WAIT AND SEE...?

The UK and Ireland rental sector appears to have moved from 'cautiously optimistic' in 2023 to a 'wait and see' attitude last year. In general, 2024 was a year of change, marked by several significant events including the ongoing conflicts and climatic extremes, with its effects felt by most countries in one way or another. However, it is political uncertainty that upsets businesses, the 'not knowing what is going to happen' which affects confidence, delays major projects, restricts investment and results in businesses of all types and sizes battening down the hatches and waiting to see.

All of this coupled with price rises - albeit at a slower rate - and the appetite for adding new equipment to the fleet and expanding the business tends to go on the 'back burner'. Only six percent of crane companies and four percent of access companies said that their fleet size had decreased last year but 55 percent of cranes and 25 percent of access fleets remained the same with 39 percent of cranes, 71 percent of access and 63 percent of telehandler companies claiming to have grown their fleet size.

Rental rates in the UK and Ireland generally improved in 2023, even if those rates were insufficient to cover the significant double digit cost increases to power, labour and materials. Inflation is now coming under control, although higher interest rates has dampened down the economy a little. It can turn into a vicious downward cycle, all of which can cause rental rates to fluctuate enormously - some up, some the same as last year and some falling quite substantially. The majority of responses - around 50 percent - indicated rates had remained stable, around 25 percent - equally split between crane and access rental companies - saying they had increased or decreased. However, telehandler companies were split 50/50 between remained the same and increased.

Looking forward to 2025 the response was cautious with about half of the respondents across all three categories saying rates would increase and slightly fewer saying they would stay the same. Only three percent of crane companies said they would decrease, 10 percent of access companies but not one telehandler company.

TELEHANDLERS A GOOD INDICATOR?

As telehandlers are often the first machines on site they can provide an indication of the workload in the pipeline, which might benefit the crane and access companies later. It may also reflect greater rate discipline among the big telehandler fleet owners? But hopefully the former proves to be the case, and that a busy-ish year ahead will become a reality for most companies.

The stampede by manufacturers towards electric machines appears to have lost a little momentum as contractors realise that carbon neutral sites can be a costly challenge in terms of organising enough power to cope with overnight charging demands.

SHOULD YOUR CHILDREN COME INTO THE INDUSTRY?

The final acid question that always provides a good indication of the state of the industry is

'Would you recommend the equipment rental business to your children?' All three sectors were quite similar this year, crane managers answered similarly to last year, (57% Yes/43% No), while access people were not as optimistic but still surprisingly high at (64% Yes/36%No). Telehandler optimism however plummeted from 91 percent that said yes last year to 64 percent this year.

Interesting times ahead.

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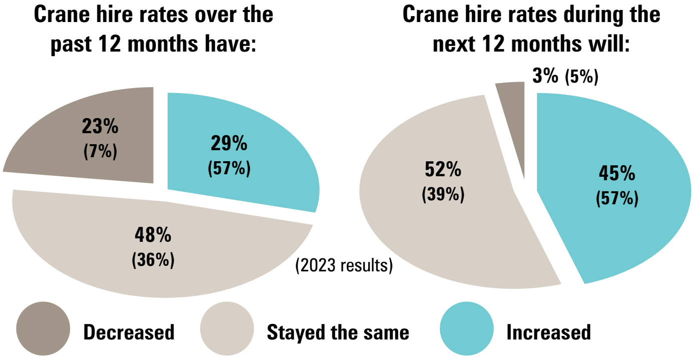
CRANE RATES

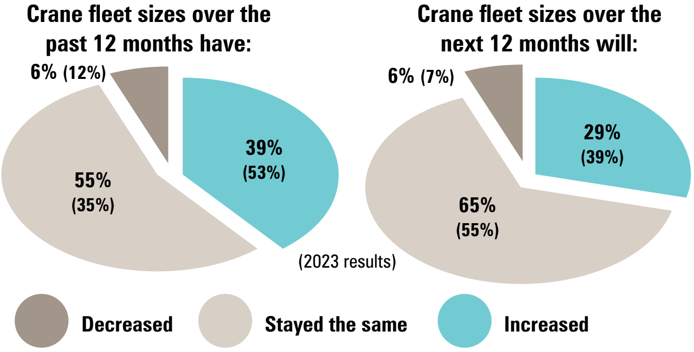
Crane rate trends - all types



2024 has certainly been less optimistic than last year's predictions. Only 29 percent of our respondents say that rates have increased in 2024, while last year 57 percent had seen an increase. At the same time 23 percent say rates have actual decreased compared to five percent who thought this might happen in last year's survey. This is backed up by comments saying there are too many cranes chasing less work, while companies without cranes are offering a cheap full service and companies dropping rates to get cranes out.

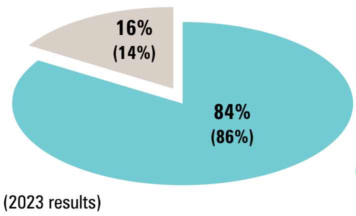
Fewer companies are predicting an increase in rates during 2025, with the majority thinking rates will remain stable. Only three percent think rates will decrease which is in some respects positive.

Crane fleet size



The majority of company crane fleets - 55 percent - have remained the same, while 39 percent have increased which is exactly as predicted in last year's survey. However bearing in mind most new cranes have more than a 12 month lead time, investment levels last year were already known! Slightly worrying is that only 29 percent of companies are planning to increase their fleets in the coming 12 months - down from 39 percent in the last survey.

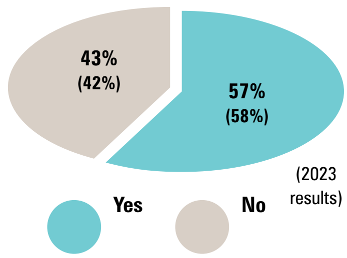
What percentage of your operators are employed or freelance?

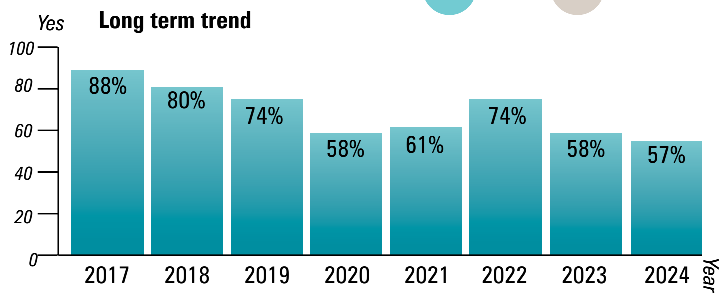


This year is almost identical to last with the vast majority of operators being employed possibly looking to lock in hard to find skilled operators?

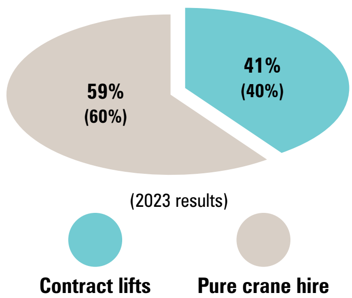
Would you recommend the crane hire industry to your children?

A very similar result to last year although the 57 percent responding yes is the lowest figure since 2016 and down from an all-time high of 88 percent in 2017. Uncertain times ahead?

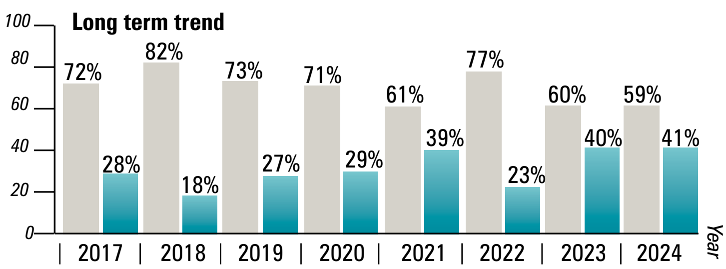




What percentage of your jobs are contract lifts?

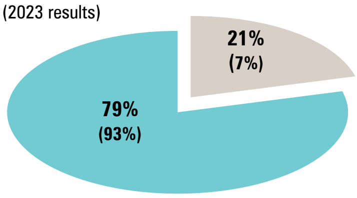


The trend towards contract lifts continues even though there is only a one percent rise from last year to 41 percent. Possibly an indicator going forward?



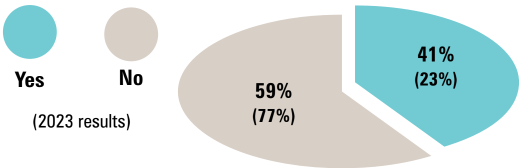
Who does your LOLER Thorough Examinations?

(2023 results)



A reasonable swing this year away from Third Party examination which is down to 79 percent.

Do you employ any female crane operators?



While the figure of 41 percent of companies saying they employ female operators is very similar to 2022 figures and significantly more than last year's 23 percent it may distort the situation as often there may be only one or two in each company.

Average fleet age in years

Average	Lowest	Highest
5.75(5)	2(2)	12(15)

(2023 results)

The average fleet age is slightly higher than last year at 5.75 years. Although the lowest is still two years, the highest has fallen to 12 from 15 years. Perhaps a sign that investment in new cranes is more replacing older models than fleet expansion?

CRANE RENTAL RATES

From last year rates have gone
▲ up ▼ down – same ND no data

All terrains or truck cranes (operated)

Daily Rate in £

Crane Size	Average	Lowest	Highest	Ideal
Under 30 tonnes	593 ▲	530 ▲	850 ▲	833 ▲
30 to 45 tonnes	697 ▲	585 ▲	850 ▲	876 ▲
50 to 75 tonnes	822 ▲	700 ▲	1,050 ▲	1,055 ▲
76 to 100 tonnes	1,214 ▲	950 ▲	1,500 –	1,433 ▲
110 to 130 tonnes	1,580 ▲	1,300 ▲	2,000 ▼	1,889 ▲
140 to 170 tonnes	2,300 ▲	1,750 ▲	3,000 ▲	2,681 ▲
180 to 210 tonnes	2,608 ▲	2,000 ▲	4,000 ▲	3,342 ▲
220 to 280 tonnes	3,044 ▲	2,500 ▲	4,400 ▲	3,669 ▲
290 to 400 tonnes	5,167 ▲	3,500 ▲	7,500 ▼	5,875 ▲
410 to 550 tonnes	8,333 ▲	6,000 ▲	12,500 ▲	10,000 ▲
Mobile Self Erecting Tower crane (2/3 axles)	1,250 ▲	950 ▲	1,800 ▲	2,000 ▲
Mobile Self Erecting Tower (4/5 axles)	1,958 ▲	1,450 ▲	2,500 ▲	2,475 –
Mobile Self Erecting Tower (6 axles +)	2,380 ▲	2,100 ▲	2,800 ▲	2,625 ▼

Lattice crawler cranes (operated)

Weekly Rate in £

Crane Size	Average	Lowest	Highest	Ideal
Up to 80 tonnes	2,750 ND	2,000 ND	3,700 ND	3,700 ND
85 to 110 tonnes	3,238 ND	2,000 ND	4,250 ND	3,438 ND
115 to 160 tonnes	4,783 ND	4,350 ND	5,500 ND	5,750 ND
170 to 260 tonnes	5,800 ▲	5,600 ▲	6,000 ▲	6,625 ▲
270 to 350 tonnes	7,253 ▲	6,500 –	8,000 ▲	8,750 ▲

Some categories have changed this year so no previous data available

Telescopic crawler cranes (operated)

Weekly Rate in £

Crane Size	Average	Lowest	Highest	Ideal
20 to 75 tonnes	3,633 ND	3,000 ND	4,500 ND	4,000 ND
80 to 120 tonnes	4,600 ND	4,000 ND	5,500 ND	5,167 ND
125 to 160 tonnes	5,250 ND	5,000 ND	6,250 ND	5,750 ND
170 to 260 tonnes	6,000 ND	5,750 ND	6,250 ND	7,500 ND

Some categories have changed this year so no previous data available

Flat tops and saddle jibs weekly rate in £

Crane Size	Average	Lowest	Highest	Ideal
Less than 70t/m	688 ▲	600 –	800 ▲	856 ▲
120t/m	925 ▲	750 ▲	1,200 ▲	1,094 ▲
200t/m	1,245 ▼	850 ▼	1,800 ▼	1,593 ▼
300t/m	1,844 ▼	1,375 ▼	2,700 ▼	2,391 ▼

Luffers weekly rate in £

Crane Size	Average	Lowest	Highest	Ideal
Less than 70t/m	1,339 ▲	1,100 ▲	1,700 ▲	2,100 ▲
100t/m	1,295 ▲	900 –	1,750 ▲	1,653 ▼
180t/m	1,713 ▲	1,400 ▼	2,350 ▼	2,094 ▼
300t/m	2,567 ▼	2,200 ▲	2,750 ▼	3,200 ▼

Self-erectors weekly rate in £

Crane Size	Average	Lowest	Highest	Ideal
Self-erectors	760 ▲	650 –	900 ▲	913 ▲

Pick & carry cranes weekly rate in £

Crane Size	Average	Lowest	Highest	Ideal
Under 3 tonnes	575 ▲	500 ▼	650 ▲	875 ▲
3 to 6 tonnes	1,483 ▼	800 ▼	2,750 ▼	717 ▼
6.5 to 10 tonnes	1,283 ▲	1,150 ▼	1,500 ▲	1,167 ▼
Over 10 tonnes*	2,625 ND	2,250 ND	3,000 ND	1,600 ND

*New category

Mini crawler cranes weekly rate in £

Crane Size	Average	Lowest	Highest	Ideal
Up to 12 tonnes	1,563 ▲	1,000 ▲	3,000 ▲	2,117 ▲

Spider cranes weekly rate in £

Crane Size	Average	Lowest	Highest	Ideal
Up to 1 tonne	467 ▼	400 ▼	500 ▼	525 ▼
2 to 5 tonnes	975 ▼	550 ▼	1,250 ▼	700 ▼
Over 5 tonnes	1,633 ▲	750 ▼	3,100 ▲	1,000 ▼

UTILISATION

All terrains or truck cranes (operated)

Crane Size	Average	Lowest	Highest	Trend
Under 30 tonnes	81%	75%	90%	▼
30 to 45 tonnes	74%	65%	80%	▼
50 to 75 tonnes	74%	50%	80%	▼
76 to 100 tonnes	69%	50%	80%	▼
110 to 130 tonnes	69%	50%	80%	▼
140 to 170 tonnes	74%	60%	90%	▼
180 to 210 tonnes	73%	60%	80%	▼
220 to 280 tonnes	68%	40%	85%	▼
290 to 400 tonnes	80%	79%	80%	▲
410 to 550 tonnes	57%	40%	80%	▲
Mobile Self Erecting Tower crane (2/3 axles)	56%	50%	80%	▼
Mobile Self Erecting Tower (4/5 axles)	73%	60%	90%	▼
Mobile Self Erecting Tower (6 axles +)	85%	80%	90%	▲

Lattice crawler cranes (operated)

Crane Size	Average	Lowest	Highest	Trend
Up to 80 tonnes	81%	70%	100%	ND
85 to 110 tonnes	92%	75%	100%	ND
115 to 160 tonnes	94%	88%	100%	ND
170 to 260 tonnes	100%	100%	100%	ND
270 to 350 tonnes	100%	100%	100%	▲

Telescopic crawler cranes (operated)

Crane Size	Average	Lowest	Highest	Trend
20 to 75 tonnes	100%	100%	100%	ND
80 to 120 tonnes	100%	100%	100%	ND
125 to 160 tonnes	96%	86%	100%	ND
170 to 260 tonnes	100%	100%	100%	ND

New category this year

Flat tops and saddle jibs

Crane Size	Average	Lowest	Highest	Trend
Less than 70t/m	50%	50%	51%	▲
120t/m	65%	50%	80%	▲
200t/m	56%	38%	70%	▲
300t/m	62%	25%	80%	▲

Luffers

Crane Size	Average	Lowest	Highest	Trend
Less than 70t/m	90%	90%	90%	–
100t/m	75%	55%	95%	▲
180t/m	62%	33%	95%	▼
300t/m	83%	70%	95%	▲

Self-erectors

Crane Size	Average	Lowest	Highest	Trend
Self-erectors	60%	55%	65%	▼

Pick & carry cranes

Crane Size	Average	Lowest	Highest	Trend
Under 3 tonnes	44%	32%	50%	▼
3 to 6 tonnes	50%	50%	50%	▲
6.5 to 10 tonnes	60%	45%	65%	▲
Over 10 tonnes	50%	50%	50%	ND

Mini crawler cranes

Crane Size	Average	Lowest	Highest	Trend
Up to 12 tonnes	25%	25%	25%	▼

Spider cranes

Crane Size	Average	Lowest	Highest	Trend
Up to 1 tonne	40%	40%	40%	▼
2 to 5 tonnes	60%	60%	60%	▲
Over 5 tonnes	65%	65%	65%	▲

CRANE RESPONDENTS' COMMENTS

While some companies were reticent to provide raw data, they were certainly forthcoming when it came to comments. Here are just a few of them:

"Still a lot of companies fighting each other and racing to the bottom, the biggest problem the industry has is companies without any assets (mainly cranes) offering a cheap full service. Crane companies should stop supplying and supporting these businesses who are driving rates down."

"Rates generally seem to be reducing with the delays in works starting mainly due to the new government gateway planning. This means there are too many cranes in the UK."

"Tower Cranes - Over the past 12 months, we have observed a consistent decline in weekly hire rates for tower cranes, a trend we expect to persist.

The tower crane market has become increasingly competitive, with numerous companies, particularly concrete frame contractors with their own crane fleets, entering the market. This heightened competition is driving down hire rates.

Additionally, the scarcity of new construction projects is exacerbating the situation. We are witnessing a growing number of companies bidding on the same projects; where previously 2-3 companies would bid, we now see 4-5. This increased competition for limited projects further reduces the demand for crane hire.

Given the current rates, it is challenging to justify the acquisition of new cranes. Consequently, we anticipate that many companies will refrain from investing in new cranes in the coming years, leading to an aging fleet.

Crawler Cranes - The market is currently buoyant, particularly for telescopic crawlers, and this trend is expected to continue for at least the next year, driven by HS2 and upcoming infrastructure projects.

However, there is a potential downside; once HS2 concludes, there may be an oversupply of crawler cranes in the UK."

"Despite best endeavours to move rates in line with costs, too many people revert back to dropping prices significantly to get cranes out. This is nothing new. Costs are extremely high and it is important to keep prices moving continually. We have had success increasing rates with customers using agreed frameworks but day to day spot hire is challenging and it appears to be a race to the bottom on a lot of occasions.

We are a little unsure of the next 12 months as the new government settles in but the mid term outlook appears to be positive and we are optimistic that consistent growth will follow in line with government predictions.

The availability of trained people of course is also a major issue and the training of new entrants is not easy, quick or cheap. Crane hire rates need to keep increasing if we are to afford competitive wage increases in order to remain an attractive sector for people. Our industry is a small fish in a big pool and both wage rates and general benefits need to improve if we are to recruit, train and retain good people.

The police have played a significant part in causing unnecessary widespread disruption to the whole of the sector this year. However we are optimistic that common sense will prevail and a more reasonable and consistent application of the regulations/guidance will follow."

"There are a lot of crane companies out there and at the moment people are under cutting people to get the jobs."

"Contract Lift rates are sustainable but crane hire rates need to increase especially for small cranes."

"I found you can lose a tender over the smallest amount."

"I think the work load has slightly dropped, more construction site are utilising tower cranes. This results in less general day to day work for 2-4 axle mobile cranes. Therefore I cant see the small to mid range mobile crane rates increasing within the next 6 months."

"The rates have remained substantially below where they need to be."

"Rates needs to increase but the client base we have is looking good for 2025."

"The market has been weak but not dead. Decent rates are possible but not the norm."

"Buoyant market in the North East. Rental rates too low mainly due to smaller/start up companies offering low rates."

"As a industry we need to raise rates in line with machine costs - fuel and embargo overtime."

"The crane industry a lot of the time destroys itself when it comes to pricing and undercutting each other."

"If you provide a good quality, accredited, safety conscious service with well trained and experienced staff then clients see that, if you can keep reproducing that day in and day out then they will pay the appropriate rates. I think the market has improved over the last few years, rates certainly have."

The problem is the larger companies taking cheap rates then letting customers down last minute leaving the price low but customers not wanting to pay for premier service only cost driven even if it costs them more in long run with down time."

"This past year has been tough with some local competitors reducing their rates. We will be increasing rates across the board in 2025 but understand it will be tough to get all customers onboard. This will inevitably result in much negotiating and compromise."

"Rental rates are circa 10% lower than they were 10 years ago, despite the overall inflation and cost pressures. I believe most, if not all tower crane rental companies have suffered a loss of margin during this time. This is largely due to market conditions, but it is also due to come rental companies cutting rates and targeting high utilisation rather than preserving margins."

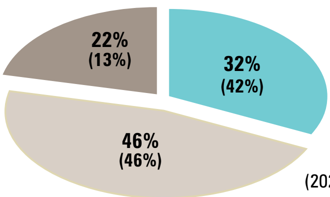
"Work levels are good, contract lifts appear to be increasing year on year, however we are losing circa £20k per month due to movement order and embargo restrictions."

POWERED ACCESS RATES

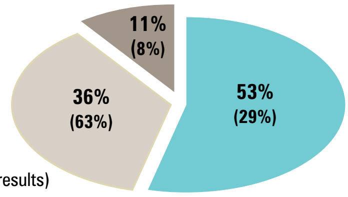
Decreased Stayed the same Increased

Rate trends

Access rates over the past 12 months have:



Access rates during the next 12 months will:

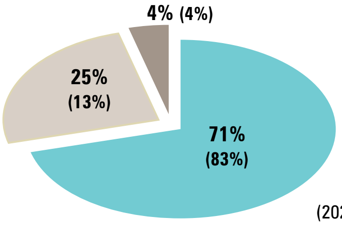


(2023 results)

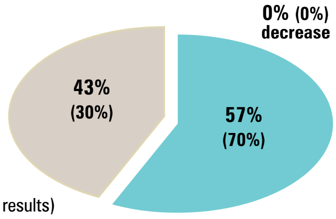
As with last year's figures, the vast majority of respondents reported that rental rates had increased or stayed the same however, 22 percent say they have fallen compared with only eight percent predicting a reduction in last year's survey. There is slightly more optimism as 53 percent of respondents think rates will increase this year with a further 36 percent expecting them to remain the same. Overall this year's figures were not as good as predicted in last year's survey.

Fleet trends

Fleet sizes over the past 12 months have:



Fleet sizes over the next 12 months will:

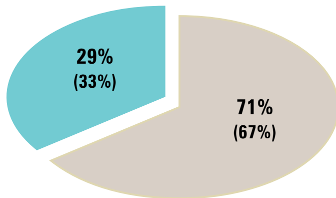


(2023 results)

The good news is no one expects to reduce the size of their fleets in 2025 and a surprising 57 percent expect them to increase. This follows on from 2024 when almost three quarters of fleets grew in size and only four percent of companies reduced them. Quietly optimistic?

Who does your LOLER Thorough Examinations?

At 71 percent in-house, this is a small move back towards in-house inspections, four percent more than the 2023 figure.

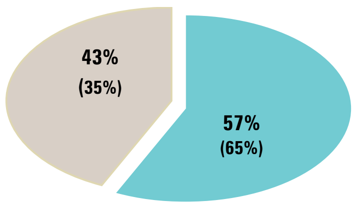


(2023 results)

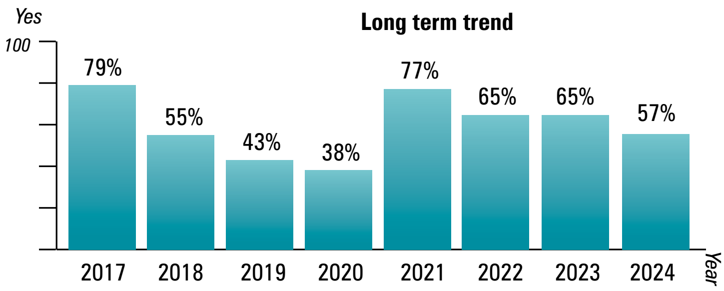
Third party In house

Would you recommend the access industry to your children?

The result is not as good as last year but at least the majority (57%) say they would recommend the business to their children. The figure is however the fourth lowest in the past nine years.



Yes No (2023 results)



Average fleet age in years

Average	Lowest	Highest
4.4 (4)	2 (2)	7(9)

(2023 results)

Whilst the average fleet age has increased to 4.4 years, the youngest is still two years however the oldest has now reduced to seven years from nine.

WEEKLY RENTAL RATES BY GENERAL CATEGORY

From last year rates have gone
▲ up ▼ down – same ND no data

Electric scissors weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 20ft (7.8m)	95 ▼	55 ▼	160 ▼	123 ▲
20ft (8m)	120 ▲	87 ▲	250 ▲	135 ▼
26ft (10m)	139 ▲	100 ▼	275 ▲	157 ▼
28-35ft (12m)	165 ▼	110 ▼	300 ▲	194 ▼
36-48ft (13-16.5m)	241 ▼	165 ▲	350 ▲	275 ▼
49-59ft (16.6-19.5m)	554 ▲	250 ▼	695 ▼	625 ▼
60-80ft (20-26m)	745 ▼	675 ▲	855 ▼	854 ▼
Over 80ft (27m)*	1,683 ND	1,600 ND	2,000 ND	2,500 ND

*New category

Diesel scissors weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 40ft (14m) (Compact RT)	202 ▲	145 ▼	400 ▲	215 ▼
32-44ft (12-15m) (Full size RT)	219 ▼	165 ▼	285 ▼	280 ▼
50-65ft (17-22m)	310 ▲	226 ▲	780 ▲	492 ▲
66-80ft (22-26m)	764 ▲	650 ▲	856 ▲	802 ▼
81-95ft (26-30m)*	1,336 ND	1,172 ND	1,500 ND	1,586 ND
Over 96ft (30m)*	2,244 ND	2,000 ND	2,500 ND	2,410 ND

*New category

Electric articulated boom lifts weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 36ft (13m) Industrial	224 ▼	180 ▼	250 ▼	263 ▼
Under 38ft (14.5m) Nifty HR12/ Snorkel AB38	247 ▼	200 ▼	300 ▼	268 ▼
38-55ft (14-18m) (Genie 45/52ft)	275 ▼	245 ▲	330 ▼	309 ▼
56-70ft (18-23m)	429 ▲	335 ▼	485 ▼	464 ▼
Over 71ft (23m)	813 ▲	490 ▼	950 ▲	897 ▼

Diesel/RT articulated booms weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 53ft (16m)	275 ▼	180 ▼	400 ▼	331 ▼
56-68ft (17-23m)	363 ▼	210 ▼	409 ▼	406 ▼
69-89ft (23-29m)	546 ▼	245 ▼	695 ▼	608 ▼
90-140ft (30-44m)	1,140 ▼	443 ▼	1,950 ▼	1,241 ▲
Over 145ft (45m)	1,711 ▲	1,500 ▲	1,911 ▲	2,000 ▲

Straight booms weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 48ft (16m)	244 ▼	234 ▼	255 ▼	284 ▼
49-70ft (17-23m)	370 ▲	328 ▲	400 ▼	437 ▼
71-90ft (23-29m)	624 ▲	510 ▲	850 ▲	720 ▼
91-140ft (29-44m)	1,223 ▼	900 ▼	1,750 ▼	1,356 ▼
141-160ft (45-50m)*	1,414 ND	1,200 ND	2,000 ND	1,746 ND
Over 160ft (50m)*	2,087 ND	2,000 ND	2,173 ND	2,337 ND

*New category

Spider lifts weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Up to 15 metres	481 ▼	420 ▼	601 ▲	537 ▼
16 - 20 metres	826 ▲	485 ▼	1,510 ▲	893 ▲
21 - 27 metres	1,253 ▼	780 ▲	1,778 ▼	1,387 ▼
28 - 30 metres	1,654 ▼	1,200 ▼	2,107 ▲	1,654 ▼
31 - 34 metres	2,069 ▼	2,000 ▲	2,107 ▼	2,202 ▲
35 - 42 metres	2,600 ▲	2,600 ▲	2,600 ▲	4,000 ▲

Van mounts weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
10 - 12 metres	529 ▲	457 ▲	600 ▲	457 ▼
13 - 14 metres	579 ▲	386 ▼	800 ▲	518 ▼
Over 15 metres	692 ▲	525 ▲	850 ▲	688 ▼

Truck mounts daily rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 18m 3.5t Self-Drive	466 ▲	150 ▼	850 ▲	300 ▼
19-25m 3.5t Self-Drive	520 ▲	129 ▼	1,100 ▲	360 ▼
22-35m with operator	934 ▲	567 ▲	1,300 ▲	567 ▼
36-49m with operator	993 ▲	750 ▼	1,250 ▲	1,044 ▲
50-65m with operator	1,271 ▼	1,200 –	1,350 ▼	1,224 ▼
66-75m with operator*	1,785 ND	1,620 ND	1,950 ND	1,820 ND
Over 76m with operator*	2,465 ND	2,380 ND	2,550 ND	2,481 ND

*New category

Mast booms weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
8 metres	120 ▼	86 ▼	175 ▲	250 ▲
10 - 11 metres	223 ▲	185 ▲	250 –	246 ▲
Over 12 metres	285 ▲	230 –	360 ▲	422 ▲

Push arounds weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Push Around (Pop Up/ Power Towers)	58 ▲	30 –	96 ▲	71 ▲
Portable (AWP/UL)	275 ▲	190 ▲	360 ▲	305 ▲

Trailer lifts weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Up to 13 metres	246 ▲	185 ▲	350 ▲	292 ▲
14 - 19 metres	380 ▲	270 ▼	450 ▲	419 ▼

UTILISATION

Electric scissors

Platform Height	Average	Lowest	Highest	Trend
Under 20ft (7.8m)	72%	30%	86%	▲
20ft (8m)	61%	30%	84%	▼
26ft (10m)	71%	30%	97%	▲
28-35ft (12m)	69%	30%	97%	▲
36-48ft (13-16.5m)	69%	50%	88%	▲
49-59ft (16.6-19.5m)	72%	46%	100%	▼
60-80ft (20-26m)	76%	54%	100%	▲
Over 80ft (27m)	86%	75%	100%	▲

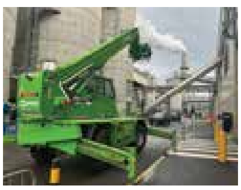
Diesel scissors

Platform Height	Average	Lowest	Highest	Trend
Under 40ft (14m) (Compact RT)	67%	30%	98%	▲
32-44ft (12-15m) (Full size RT)	67%	30%	92%	▼
50-65ft (17-22m)	79%	43%	100%	▲
66-80ft (22-26m)	64%	48%	74%	▼
81-95ft (26-30m)*	83%	65%	100%	ND
Over 96ft (30m)*	85%	55%	100%	ND

**New category*

Electric articulated boom lifts

Platform Height	Average	Lowest	Highest	Trend
Under 36ft (13m) Industrial	78%	61%	90%	▲
Under 38ft (14.5m) Nifty HR12/ Snorkel AB38	67%	14%	86%	▼
38-55ft (14-18m) (Genie 45/52ft)	78%	51%	91%	▲
56-70ft (18-23m)	72%	30%	88%	▲
Over 71ft (23m)	75%	54%	92%	▲



Diesel/RT articulated booms

Platform Height	Average	Lowest	Highest	Trend
Under 53ft (16m)	72%	49%	95%	▲
56-68ft (17-23m)	78%	48%	100%	▲
69-89ft (23-29m)	77%	50%	100%	▼
90-140ft (30-44m)	79%	56%	95%	▲
Over 145ft (45m)	65%	60%	71%	▼

Straight booms

Platform Height	Average	Lowest	Highest	Trend
Under 48ft (16m)	77%	54%	100%	▼
49-70ft (17-23m)	81%	59%	100%	▲
71-90ft (23-29m)	85%	67%	100%	▼
91-140ft (29-44m)	70%	69%	70%	▼
141-160ft (45-50m)*	71%	61%	80%	ND
Over 160ft (50m)*	73%	63%	82%	ND

**New category*

Spider lifts

Platform Height	Average	Lowest	Highest	Trend
Up to 15 metres	57%	37%	90%	▲
16 - 20 metres	58%	20%	100%	▲
21 - 27 metres	57%	50%	75%	▼
28 - 30 metres	47%	16%	78%	▲
31 - 34 metres	60%	16%	89%	▲
35 - 42 metres	53%	35%	75%	▼

Van mounts

Platform Height	Average	Lowest	Highest	Trend
10 - 12 metres	76%	65%	85%	ND
13 - 14 metres	66%	59%	77%	ND
Over 15 metres	75%	65%	85%	ND

New category

Truck mounts

Platform Height	Average	Lowest	Highest	Trend
Under 18m 3.5t Self-Drive	62%	41%	81%	▼
19-25m 3.5t Self-Drive	72%	44%	100%	▼
22-35m with operator	59%	40%	66%	▼
36-49m with operator	53%	27%	76%	▼
50-65m with operator	52%	52%	52%	▼
66-75m with operator*	62%	54%	74%	ND
Over 76m with operator*	64%	50%	85%	ND

**New category*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Mast booms

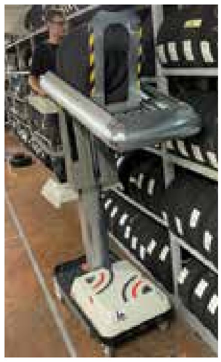
Platform Height	Average	Lowest	Highest	Trend
8 metres	63%	59%	66%	–
10 - 11 metres	70%	58%	85%	▲
Over 12 metres	80%	80%	80%	–

Push arounds

Platform Height	Average	Lowest	Highest	Trend
Push Around (Pop Up/ Power Towers)	65%	42%	80%	▲
Portable (AWP/UL)	43%	35%	50%	▼

Trailer lifts

Platform Height	Average	Lowest	Highest	Trend
Up to 13 metres	66%	48%	100%	▼
14 - 19 metres	83%	80%	87%	▲



ACCESS RESPONDENTS' COMMENTS

"Long term hire on lower rates becoming more profitable as transport costs and operating cost worsened on short term hires."

"Rental rates going down whilst cost of purchasing equipment increasing - not sustainable long term."

"I understand that there are a lot of hire companies struggling financially at the moment who seem to be buying business by reducing hire rates."

"Rates seem very low for the price of machinery now"

"Too many hire companies in the UK with too many sales people giving it away!"

"Our rates have gone up over Christmas but unsure if our competitors have done the same."

"Reasonable on Powered Access."

"I believe 2025 will be a very challenging year, where rates and returns will remain under pressure."

"Anticipate slight increase given all other costs increasing."

"Rental rates have really changed for years, end user has so many options for hire equipment. Sales people still selling on price before anything else."

"Strong rental rates for 2024. Market is now preparing for new competitors backed with large chinese rental fleets and owners."

"Certain sectors have seen the rates crashed by peoples desperation to be involved. Certain companies have employed teams of "sector specialists" only to then reduce hire rates to win work!"

"Still being driven down, bedroom brokers are not helping either."

"Rates still need to improve on most items to get a proper return on investment and the industry still needs to educate the national sales people that sell £20 notes for a tenner!"

"No comment."

"ROI is getting less and less due to increases in equipment costs that said its now a hirers market opposed to a sellers market which it hasn't been for some time."

"The rates are better than they have been historically, however, with the latest Budget changing the NIC etc. we are going to have to put our rates up to take account of the additional costs involved with running a business with employees."

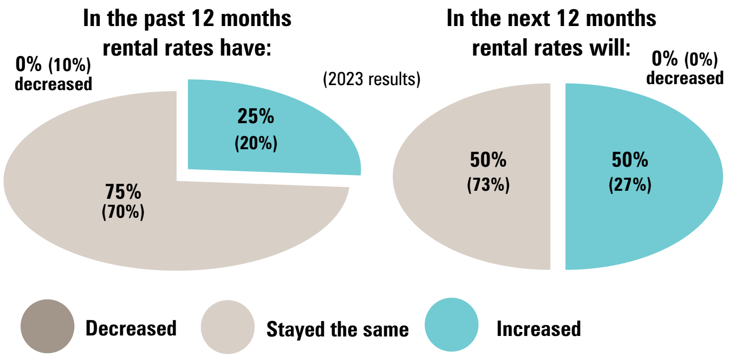
"With more manufactures coming into the fray in the UK, small independents seem to be able to lower rates as a benefit of longer term "buy now pay later" deals. I agree anyone can benefit from this, but its not sustainable, we should be pricing on service also."

"Varied and inconsistent."

"Going backwards."

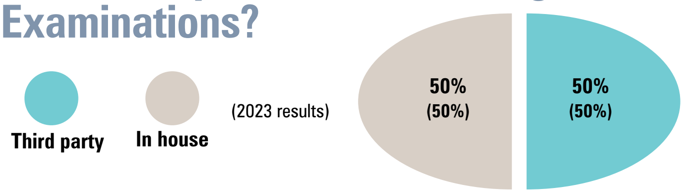
TELESCOPIC HANDLER RENTAL RATES

Rate trends



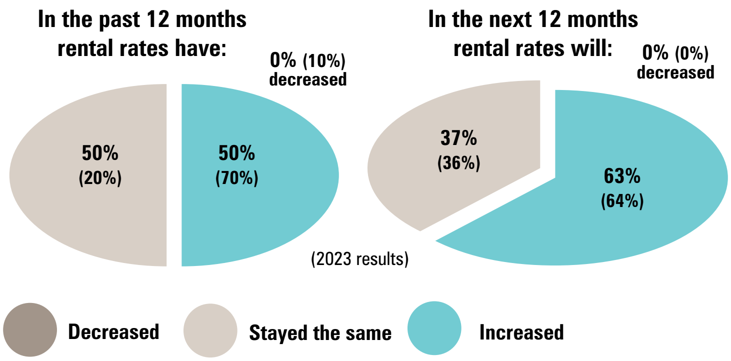
Rate predictions last year were pretty much spot on with 25 percent (compared with 27 percent) saying they had increased over the past year and 75 percent saying they had stayed the same (73%). Over the next 12 months no one thinks rates will decrease with half thinking they will increase.

Who does your LOLER Thorough Examinations?



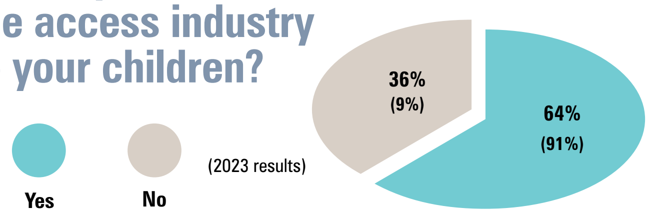
The figures this year are exactly the same as last, split evenly at 50 percent.

Fleet size



Half of the respondents say they expanded their fleets last year, 14 percent less than predicted in last year's survey. The good news is that no companies cut their fleet size. Respondents remain positive with 63 percent predicting that 2025 will see further fleet expansions, while the rest think they will remain the same.

Would you recommend the access industry to your children?



Last year must have been a tough year as only 64 percent would now recommend the industry to their children down from a strangely positive 91 percent last year.

Average fleet age in years

Average	Lowest	Highest
3.8 (3)	1.5 (1)	7.0 (5)

(2023 results)

The average age of equipment has crept up this year with the youngest fleet having an average age of 1.5 years, while the oldest is seven years giving an average of 3.8 years compared to three years previously.

What other products do you provide?

What other products do you provide?	
Cranes	9% (0%)
Access	37% (77%)
General equipment	46% (60%)
Tools	9% (33%)
Others	18% (65%)

(2023 results)

Obviously a different mix of respondents this year with general equipment the leading 'other products' supplied at 46 percent followed by access at 37 percent. This year companies with cranes in their fleets has increased from zero in 2023 to nine percent.

Fixed frame weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 5 metres (Sub Compact)	238 ▼	200 ▼	295 ▼	264 ▼
5 to 7 metres (Compact)	301 ▼	230 –	400 ▼	305 ▼
8 to 10 metres	295 ▼	240 ▼	525 ▼	332 ▼
11 to 15 metres*	378 ND	285 ND	610 ND	398 ND
16 to 18 metres	464 ▲	390 ▼	650 ▲	487 ▲
Over 18 metres	627 ▲	555 ▲	750 ▲	690 ▼

**New category*

360 degree weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
Under 20 metres	975 ▼	950 ▼	1,000 ▼	1,030 ▼
20 to 26 metres	1,224 ▲	1,100 ▲	1,423 ▼	1,388 ▼
27 to 35 metres	1,576 ▲	1,411 ▲	1,800 ▼	1,440 ▼
Over 35 metres	3,125 ▲	2,750 ▲	3,500 ▲	3,333 ▲

Heavy duty - high capacity weekly rate in £

Platform Height	Average	Lowest	Highest	Ideal
6 to 8 tonnes	693 ▲	650 ▲	730 ▲	923 ▼
9 to 12 tonnes	1,222 ▼	1,025 ▼	1,420 ▲	1,530 ▼
14 to 20 tonnes	1,725 ▲	1,450 ▼	2,000 ▲	2,121 ▼

UTILISATION

Fixed frame

Platform Height	Average	Lowest	Highest	Trend
Under 5 metres (Sub Compact)	73%	65%	75%	▼
5 to 7 metres (Compact)	74%	70%	79%	▼
8 to 10 metres	75%	70%	79%	▼
11 to 13 metres	80%	75%	91%	▼
16 to 18 metres	82%	75%	93%	▼
Over 18 metres	82%	70%	90%	▼

360 degree

Platform Height	Average	Lowest	Highest	Trend
Under 20 metres	85%	70%	100%	▼
20 to 26 metres	72%	70%	75%	▼
27 to 35 metres	66%	65%	67%	▼
Over 35 metres	67%	50%	90%	▼

Heavy duty - high capacity

Platform Height	Average	Lowest	Highest	Trend
6 to 8 tonnes	69%	65%	75%	▼
9 to 12 tonnes	73%	75%	80%	▼
14 to 20 tonnes	79%	70%	85%	▼

RESPONDENTS' COMMENTS

"The hire rates stayed firm and this year seem to be heading the same way."

"Rental rates are low, forced down by competition. Market has dropped in past 12 months."

"We missed the boat when manufacturers raised their prices during/post Covid. Rates did not increase at the same rate."