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WORK INDOORS
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A rental rate crisis?

While not as strange as last year's survey, the effects of the pandemic can still be felt. The good news is that most companies are busy although finding qualified staff and improving rates is proving a serious problem for most companies.

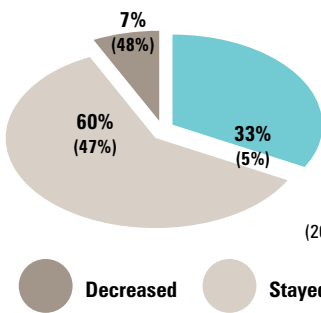
Despite the general consensus that the sector is buoyant, the comments received from cranes, access and telehandler rental companies highlight the major concern that rates have to be

increased - even if it is just to cover the increasing costs of the machines, materials and labour - although this is something the industry has struggled with for many decades.

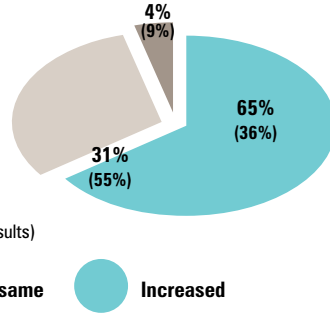
Crane rates

Crane rate trends - all types

Crane hire rates over the past 12 months have:



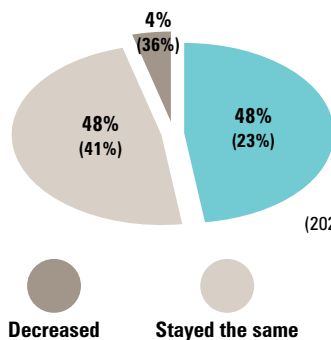
Crane hire rates during the next 12 months will:



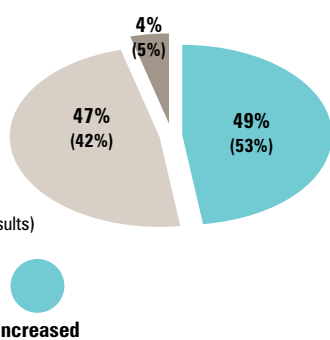
This year has been more positive than last with a third stating that hire rates had increased compared to just five percent in 2020. However, the majority of respondents reported that rates had remained static, while only a very few saw rates fall. It is good to see that last year's rate predictions were pretty much bang on! But this needs to be seen in the face of rapidly rising costs. Looking forward two thirds of respondents think that rates will rise this year. This may actually happen given the mood seen in the comments.

Crane fleet size

Crane fleet sizes over the past 12 months have:



Crane fleet sizes over the next 12 months will:



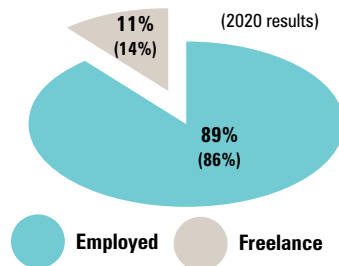
Perhaps surprisingly - given that on an inflation adjusted basis rates have fallen - almost half of companies claim to have expanded their fleets in 2021, although the vast majority simply maintained current fleet levels. It is encouraging to see that there is optimism though, with a similar number - 49 percent - are planning to expand this year.



c&a 2021 rental rate survey



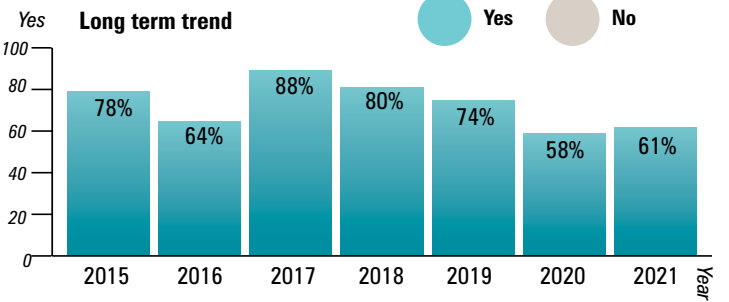
What percentage of your operators are?



It looks as though the earlier trend towards employing more operators on a freelance basis has continued to reverse, reaching a three year low. This may be a symptom of the pandemic as freelance operators look for more security, while companies are keen to have committed staff.

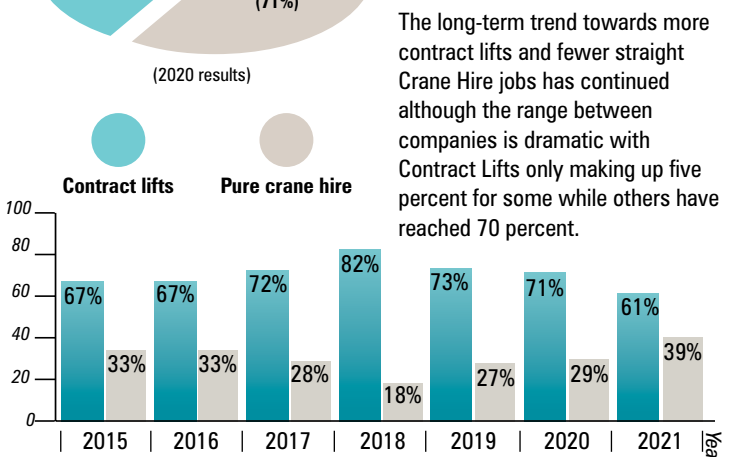
Would you recommend the crane hire industry to your children?

A slight rise in the 'tell-tale' indicator with the majority still upbeat enough to recommend the crane hire business as a career for their children, but it is on a downward trend.



What percentage of your jobs are contract lifts?

The long-term trend towards more contract lifts and fewer straight Crane Hire jobs has continued although the range between companies is dramatic with Contract Lifts only making up five percent for some while others have reached 70 percent.





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20.2 m with optional fly jib
7 inch multi monitor
2000KG pick & carry duty
Rear view camera
Limit setting



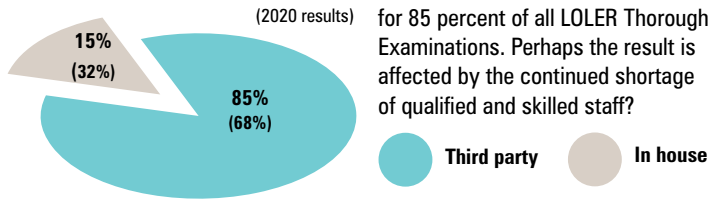
CC1908S-1

8100kg max capacity
20.1 m lifting height
26 m with hydraulic fly jib
10.4 inch multi monitor
3500KG pick & carry duty
360° surround view camera
Limit setting

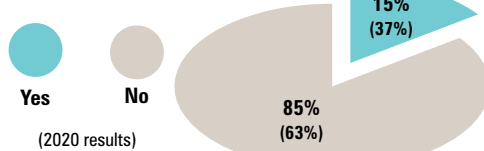


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Who does your Loler Thorough Examinations?

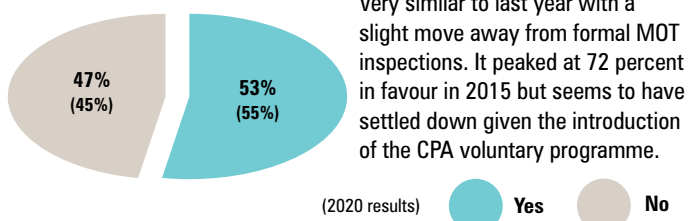


Do you employ any female crane operators?



Not encouraging with just 15 percent of crane companies employing female crane operators. While the trend is down it merely reflects the very small numbers of female operators in the industry.

Should cranes be subject to MOT's?

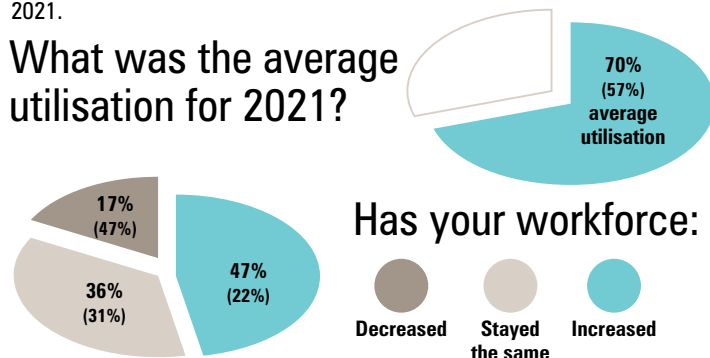


Very similar to last year with a slight move away from formal MOT inspections. It peaked at 72 percent in favour in 2015 but seems to have settled down given the introduction of the CPA voluntary programme.

Covid questions

The overall easing of the regulations and buoyant market is reflected in the figures - utilisation up, an increasing work force and more people on site and in the office - the UK Government furlough scheme ended 30th September 2021.

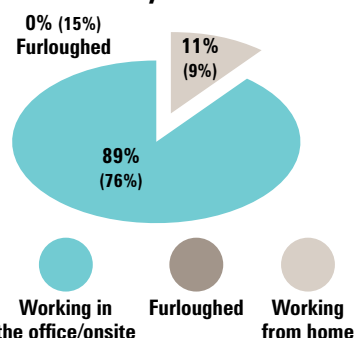
What was the average utilisation for 2021?



Has your workforce:



What percentage of your workforce is currently:



C&a 2021 rental rate survey

Crane rental rates

Daily rates for mobile cranes

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

Crane size	Average (£)	Lowest	Highest	Ideal
Up to 30 tonnes	£486 ▼	£400 ▲	£560 ▼	£597 ▲
30-45 tonnes	£507 ▲	£420 ▼	£635 ▼	£644 ▼
50-65 tonnes	£641 ▼	£570 ▲	£768 ▲	£782 ▼
70-90 tonnes	£888 ▼	£780 ▲	£1,023 ▲	£1,215 ▲
100-120 tonnes	£1,153 ▲	£950 ▼	£1,525 ▲	£1,386 ▲
130-160 tonnes	£1,675 ▲	£1,300 ▲	£2,500 ▲	£2,009 ▲
160-200 tonnes	£2,483 ▲	£1,600 ▲	£3,500 ▲	£2,917 ▲
210-250 tonnes	£2,633 ▲	£1,750 ▲	£5,310 ▲	£3,627 ▲
260 -350 tonnes	£4,529 ▲	£3,200 ▲	£6,345 ▲	£5,586 ▲
360-490 tonnes	£6,902 ▲	£4,000 ▼	£10,000 ▲	£8,522 ▲
500-600 tonnes	£8,164 ▲	£4,500 ▼	£13,000 ▲	£9,826 ▲
610 - 750 tonnes	£10,833 ND	£6,000 ND	£18,200 ND	£14,341 ND
Self-Erecting Tower (4-5 axles)	£1,239 ▲	£984 ▲	£1,300 ▲	£2,200 ▲
Self-Erecting Tower (6-7 axles)	£1,899 ▲	£1,650 ▼	£2,250 ▲	£2,432 ▲

Weekly rates for crawler cranes

Crane size - operated	Average (£)	Lowest	Highest	Ideal
Up to 50 tonnes	£1,367 ▼	£1,000 ▼	£2,000 ▼	£3,052 ▲
50-60 tonnes	£1,988 ▼	£1,500 ▼	£2,000 ▼	£2,369 ▼
70-80 tonnes	£2,473 ▼	£650 ▼	£3,500 ▼	£3,140 ▼
90-100 tonnes	£3,122 ▲	£2,650 ▲	£3,500 ▲	£4,252 ▲
120 -150 tonnes	£3,806 ▲	£2,950 ▲	£4,250 ▲	£5,240 ▲
180-250 tonnes	£4,086 ▲	£3,800 ▲	£4,600 ▲	£6,976 ▲
Over 250 tonnes	ND	ND	ND	ND

Weekly rates for tower cranes

Flat tops and saddle jibs	Average (£)	Lowest	Highest	Ideal
Up to 70 tonnes/metres	£705 ▲	£600 ▲	£900 ▲	£902 ▲
120 tonnes/metres	£973 ▲	£900 —	£1,100 ▲	£1,221 ▲
200 tonnes/metres	£1,191 ▼	£875 ▼	£1,550 ▲	£1,554 ▲
300 tonnes/metres	£1,498 ▼	£1,300 ▼	£1,800 —	£1,774 ▼
Luffers	Average (£)	Lowest	Highest	Ideal
Less than 70 tonnes/metres	£1,252 ▲	£950 ▲	£2,000 ▲	£1,783 ▲
100 tonnes/metres	£1,773 ▲	£1,700 ▲	£1,900 ▼	£2,091 ▲
180 tonnes/metres	£1,777 ▼	£850 ▼	£2,000 ▼	£1,977 ▼
300 tonnes/metres	£1,865 ▼	£1,450 ▼	£2,400 ▼	£2,452 ▼
Self Erectors	Average (£)	Lowest	Highest	Ideal
Self Erectors	£1,250 ▲	£800 ▲	£2,000 ▲	£1,346 ▲

Weekly rates of other cranes

Crane size	Average (£)	Lowest	Highest	Ideal
Pick & Carry < 2.5 tonnes	£692 ▲	£550 ▲	£800 ▲	£783 ▲
Pick & Carry 3-5 tonnes	£731 ▲	£500 ▼	£850 ▲	£735 ▲
Pick & Carry 5.5-10 tonnes	£974 ▼	£725 —	£1,350 ▲	£1,000 ▲
Pick & Carry > 10 tonnes	£1,050 ▼	£850 ▲	£1,250 ▲	£1,222 ▼
Mini crawlers < 12 tonnes	£1,297 ▼	£750 ▲	£1,845 ▼	£1,966 ▲
Spider cranes < 1 tonne	£788 ▲	£600 ▲	£1,200 ▲	£1,493 ▲
Spider cranes 2-5 tonnes	£963 ▲	£650 ▲	£1,500 ▲	£1,363 ▲
Spider cranes > 5 tonnes	£1,169 ▼	£1,050 ▲	£1,800 ▲	£1,817 ▲

Average fleet age in years

Average	Lowest	Highest
5.7 (5.5)	2.5 (1.5)	10 (8)



Utilisation and percentage of initial cost

Mobile cranes

Crane size	Utilisation			Trend
	Average	Lowest	Highest	
Up to 30 tonnes	82%	65%	95%	▲
30-45 tonnes	83%	60%	90%	▲
50-65 tonnes	82%	50%	95%	▲
70-90 tonnes	72%	40%	90%	▼
100-120 tonnes	72%	35%	90%	▼
130-160 tonnes	76%	65%	90%	▲
160-200 tonnes	66%	40%	90%	▲
210-250 tonnes	63%	50%	90%	▼
260-350 tonnes	52%	40%	65%	▼
360-490 tonnes	55%	40%	60%	▲
500-600 tonnes	57%	55%	65%	▲
Over 600 tonnes	48%	30%	65%	ND
Self-erecting twr (4-5 axles)	66%	55%	75%	▲
Self-erecting twr (6-7 axles)	74%	73%	85%	▲

Crawler cranes

Crane size	Utilisation			Trend
	Average	Lowest	Highest	
Up to 50 tonnes	51%	45%	65%	▲
50-60 tonnes	47%	40%	55%	▲
70-80 tonnes	48%	25%	55%	▼
90-100 tonnes	47%	40%	55%	▲
120-150 tonnes	54%	35%	75%	—
180-250 tonnes	75%	60%	90%	▲
Over 250 tonnes	ND	ND	ND	ND

Tower cranes

Flat tops and saddle jibs	Utilisation			Trend
	Average	Lowest	Highest	
Up to 70 tonnes/metres	70%	65%	75%	▲
120 tonnes/metres	73%	65%	80%	▲
200 tonnes/metres	72%	70%	75%	▲
300 tonnes/metres	74%	70%	80%	—

Luffers	Utilisation			Trend
	Average	Lowest	Highest	
Less than 70 tonnes/metres	68%	60%	80%	▲
100 tonnes/metres	80%	70%	90%	▲
180 tonnes/metres	74%	70%	80%	▼
300 tonnes/metres	85%	80%	90%	▼

Self Erectors	Utilisation			Trend
	Average	Lowest	Highest	
Self Erectors	66%	50%	75%	▼

Other cranes

Crane type	Utilisation			Trend
	Average	Lowest	Highest	
Pick & Carry < 2.5 tonnes	66%	60%	70%	▲
Pick & Carry 3-5 tonnes	65%	60%	70%	▲
Pick & Carry 5.5-10 tonnes	61%	50%	70%	▼
Pick & Carry > 10 tonnes	62%	55%	70%	▲
Mini crawlers < 12 tonnes	57%	45%	70%	▲
Spider cranes < 1 tonne	58%	40%	75%	▲
Spider cranes 2-5 tonnes	67%	60%	80%	▲
Spider cranes > 5 tonnes	74%	60%	85%	▼

Crane respondent's comments

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

"It is time the Crane Industry stopped shooting itself in the foot and began to charge a realistic rate for its services. The low rates being charged in relation to the value of equipment provided is ludicrous when compared to other sectors - couple this with the degree of technical ability required to run a crane fleet and the equipment required with the attendant risk, makes the situation even worse. When you have to invest in excess of £1m in equipment, man it, maintain it and provide all the necessary back up and you are unable to obtain the same rate as a mechanic in the average car main dealership, then surely it is time for things to change!"

"Rates in general are incredibly poor especially in the lower 40 to 50 tonne range. With increasing costs for fuel, wages and crane purchasing all companies must work harder to recoup these costs."

"The rental rates are far too low against the cost of buying new or nearly new cranes."

"Crane hire rates need to be increased dramatically because of large increases in the capital cost of replacements. From the 1st of April 2022 there needs to be a further massive increase to absorb the switch from red to white diesel."

"Rates are far too low for the level of investment required. With HS2 etc requiring the newest equipment the rates need to reflect this. Too many rental companies are working too cheaply, and this is driving the rates down."

"People need to realise ALL our base costs are increasing from equipment, labour, fuel etc, so for us as an industry to remain sustainable we need to increase our rates in line with these cost increases. It's basic economics!"

"As previously stated despite manufacturer's prices rising year on year it seems that the Crane Hire companies cannot take note of this, and they keep dropping their Hire Rates just to get their equipment out on Hire. Today we are finding Rental Companies putting cranes out on Hire at less than a 1/4% of the purchase price INCLUDING OPERATORS !!!!"

"Good to see that the demand for 'green' equipment is being driven by government policy."

"I have decided that I would rather have all our cranes sitting in the yard than accept some of the stupid rates that we are told others have quoted. Especially with the driver shortage and cost of fuel. I have had enough of being a busy idiot. How can we all be so stupid?"

"Rental rates have not got much worse but have not improved either. It will be interesting to see if rates can be increased in the next 12 months to match the large cost increases being experienced across the economy."



C&A 2021 rental rate survey



"We feel like the market is very buoyant at present and we foresee a positive 2022 with rental rates increasing slightly over the year."

"Too many small companies without any overheads such as correct maintenance, safety and other factors are substantially undercutting the rates to keep the crane rates at levels seen in the 1980s - this also includes various contract lifting companies."

"New equipment increased in price last year some by as much as 20% however rates remain the same due to competitive pricing in the market. Should this continue its going to be increasingly difficult to maintain a fleet renewal policy."

"We're having success with our spider cranes, the return is far greater than for a mobile, especially when it comes to the daily rate we can earn on a contract lift."

"Surprisingly maintained the same despite Covid."

"Labour rates increased."

"The tower crane market is trending towards taller free-standing saddles and luffers, and shorter out of service radii on luffers, and therefore cranes that have these characteristics carry a premium. Also, there are a lot of older luffers in the UK market and increasing numbers of clients wanting newer cranes, so this is also a significant pricing factor. With the arrival of red diesel cranes with inverter drives and hydraulic luffers that need much less power than conventional ones will also be favoured and be likely to gain a price premium over rope operated ones."

"Rates should be at least doubled to get in line with the rest of Europe."

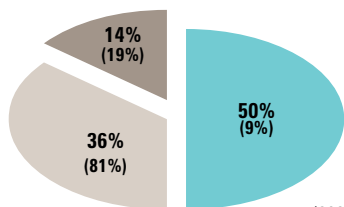
"Rates are too low - the crane industry should be run like the haulage industry, more discipline!"

"This industry is its own worst enemy. It fights between itself which keeps the rates low. If this industry worked together rates would improve. There are too many companies that don't have any safety, training or real substance to them and if you went beyond the crane on site, you would see how badly they are run. A company sends cranes all over the UK and undercuts the local companies in that area driving down the rates!! Crazy and this must change going forward as its hard enough without stupid companies doing stupid actions which helps no-one."

Powered access rates

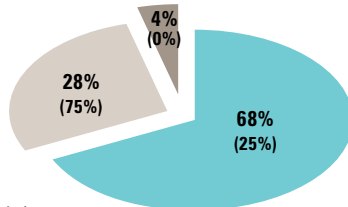
Rate trends

Access rates over the past 12 months have:



Decreased Stayed the same Increased

Access rates during the next 12 months will:

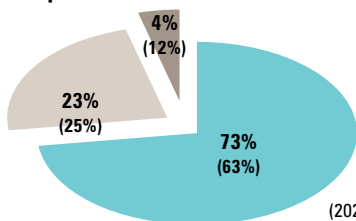


(2020 results)

The good news is that half of all respondents experienced an increase in rental rates and of those that didn't, the vast majority reported that they were static. This was far better than most predicted this time last year, when only a quarter thought rates would rise, interestingly no one anticipated a fall in rates for 2021 yet 14 percent say that is what happened. The optimism continues for 2022, with most companies expecting rates will rise again.

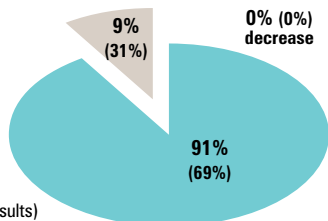
Fleet trends

Fleet size over the past 12 months have:



(2020 results)

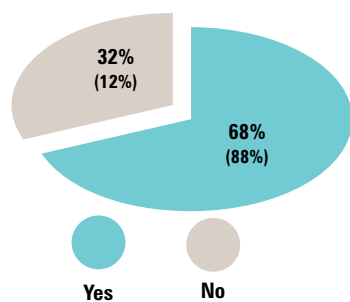
Fleet size over the next 12 months will:



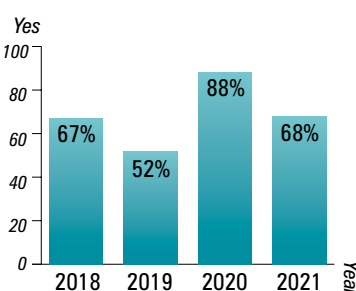
With rates improving along with demand, the majority of companies did exactly what they planned and increased their fleet size during 2021. This looks set to continue in 2022.

Do you offer IPAF training?

The percentage of correspondents offering IPAF training has fallen significantly this year. This has more to do with the fact that last year was something of an anomaly, this year's survey is more of a return to normal. We also saw a wider range of rental companies than usual. It does show that opportunities still exists to encourage more UK companies to offer formal training services.

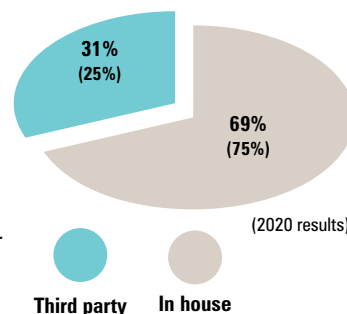


Four year trend



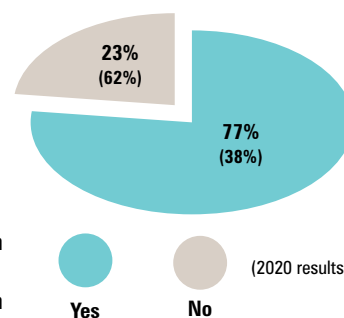
Who does your LOLER Thorough Examinations?

There has been a slight move towards third party inspections, but the vast majority continue to do their Loler inspections in-house.

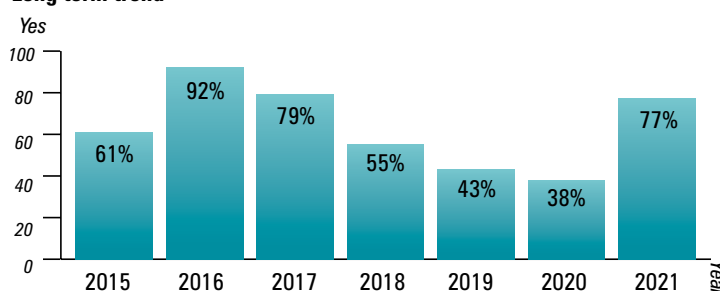


Would you recommend the access industry to your children?

This is a huge and surprising swing back to the positive levels last seen in 2017, which is interesting. More than three quarters of respondents gave an emphatic Yes to the question, which is very good to see.

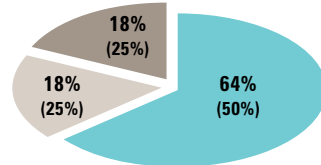


Long term trend

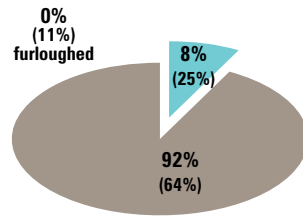


Covid questions

Has your workforce:



What percentage of your workforce is currently:

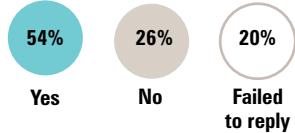


Average fleet age in years

No great change here.

Average	Lowest	Highest
5 (4.5)	2 (2.7)	11 (6.5)

Do you offer any other equipment?



Telehandlers	41%
General Plant	27%
Tool	27%
Cranes	9%
Other	9%

Weekly rental rates by general category

Push around lifts

From last year rates have gone
 ▲ up ▼ down — same

Working Height	Average (£)	Lowest	Highest	Ideal
Push Armd Lifts (PopUps etc)	£55 ▼	£45 —	£70 ▲	£77 ▲
Portable Push Armd (AWP/UL)	£131 ▲	£65 ▲	£200 ▲	£182 ▼

Trailer lifts

Working Height	Average (£)	Lowest	Highest	Ideal
12-13 metres (30-43ft)	£221 ▼	£170 ▼	£250 ▲	£272 ▲
17 metres (50ft)	£250 ▲	£200 —	£325 —	£366 ▲
Over 20 metres (65ft)	£309 ▼	£230 ▲	£375 ▼	£512 ▲

Mast booms

Working Height	Average (£)	Lowest	Highest	Ideal
8 metres	£144 ▲	£125 —	£200 ▲	£251 ▲
10 metres	£215 ▲	£175 ▲	£280 —	£332 ▲
12 metres	£281 ▼	£220 ▼	£360 —	£401 ▲



Spider lifts

Working Height	Average (£)	Lowest	Highest	Ideal
Up to 15 metres	£462 ▲	£380 ▼	£565 ▲	£750 ▲
16-20 metres	£607 ▼	£600 ▲	£825 ▼	£1,225 ▲
20-26 metres	£822 ▼	£800 —	£950 ▼	£1,624 ▲
28-30 metres	£1,269 ▼	£1,225 ▲	£1,400 ▼	£1,802 ▲
30-35 metres	£1,610 ▼	£1,200 ▼	£1,750 ▼	£2,200 ▲
Over 35 metres	£1,618 ▲	£1,375 ▼	£2,250 ▲	£2,721 ▲

Van mounts - Weekly rates

Working Height	Average (£)	Lowest	Highest	Ideal
Up to 13 metres	£330 ▼	£290 —	£350 ▼	£382 ▲
13-15 metres	£326 ▼	£285 ▼	£391 ▲	£543 ▲
Over 15 metres	£550 ▼	£440 ▼	£610 ▲	£759 ▲

Truck mounts - Daily rates

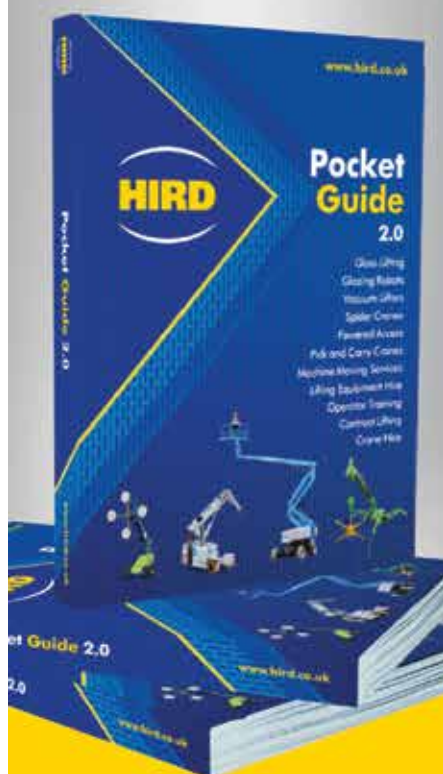
Working Height	Average (£)	Lowest	Highest	Ideal
Up to 25 metres (3.5 tonne) no operator	£192 ▲	£140 ▼	£235 ▲	£247 ▲
22-35 metres (7.5 tonne) with operator	£444 ▼	£425 ▼	£550 ▼	£602 ▲
36-45 metres with operator	£583 ▼	£530 ▼	£760 ▼	£866 ▼
46-60 metres with operator	£1,011 ▼	£935 ▼	£1,250 —	£1,473 ▲
61-70 metres with operator	£1,363 ▼	£1,300 ▼	£1,450 ▼	£1,591 ▲
Over 70 metres with operator	£1,926 ▼	£1,750 ▼	£3,000 ▼	£2,938 ▼

Electric self-propelled scissor lifts

Platform Height	Average (£)	Lowest	Highest	Ideal
Up to 5 metres	£68 ▲	£60 ▲	£75 ▼	£95 ▲
6 metres (19/20ft)	£89 ▲	£65 ▲	£100 ▼	£110 ▲
8 metres (26ft)	£104 ▲	£70 ▲	£120 —	£133 ▲
9-10 metres (30-33ft)	£128 ▲	£125 ▲	£130 ▼	£150 ▲
11-12 metres (36-39ft)	£166 ▲	£120 ▲	£185 ▼	£205 ▲
13-17 metres (42-55ft)	£288 ▲	£200 ▲	£350 —	£388 ▲
18-22 metres (60-72ft)	£475 ▼	£325 ▼	£610 ▲	£600 ▲
23-25 metres (75-82ft)	£664 ▲	£425 ▼	£675 —	£1,000 —
Over 26 metres (85ft)	No Data			

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Diesel/bi-energy scissor lifts

Platform Height	Average (£)	Lowest	Highest	Ideal
8 metres (26ft)	£158 ▼	£120 ▼	£247 —	£188 ▼
9-10 metres (30-33ft)	£163 ▲	£125 —	£185 ▲	£190 ▲
11-12 metres (36-39ft)	£195 ▲	£150 —	£225 ▲	£250 ▲
13-17 metres (42-55ft)	£230 ▲	£150 ▼	£300 ▲	£273 ▲
18-22 metres (60-72ft)	£613 ▼	£495 ▲	£700 ▲	£700 ▲
Over 22 metres (72ft)	£812 ▲	£630 ▼	£990 ▲	£1,100 ▲

Electric self-propelled booms

Platform Height	Average (£)	Lowest	Highest	Ideal
Up to 11 metres (industrial)	£207 ▲	£160 ▲	£220 ▼	£312 ▲
10-12 metres (32-40ft) (Nifty/AB38)	£215 ▲	£175 ▲	£275 ▼	£273 ▼
14-15 metres (46-49ft)	£262 ▲	£160 ▲	£295 ▼	£325 ▲

Rough Terrain articulated booms

Platform Height	Average (£)	Lowest	Highest	Ideal
12-14 metres (39-45ft)	£228 ▲	£200 ▲	£255 ▼	£279 ▲
15-16 metres (49-52ft)	£245 ▲	£225 ▲	£270 ▼	£321 ▲
17-19 metres (56-62ft)	£288 ▲	£210 —	£380 ▲	£336 ▼
20-23 metres (65-70ft)	£361 ▲	£320 ▲	£400 —	£458 ▲
24-26 metres (80-86ft)	£567 ▼	£550 ▲	£600 ▼	£648 ▼
Over 27 metres	£989 ▲	£590 ▼	£1,200 —	£1,620 ▲



Straight telescopic booms

Platform Height	Average (£)	Lowest	Highest	Ideal
Up to 17 metres (26ft)	£225 ▲	£180 —	£275 ▼	£397 ▲
20-23 metres (60-70ft)	£343 ▼	£300 ▲	£380 ▲	£450 ▲
24-26 metres (80-86ft)	£517 ▲	£440 ▲	£550 ▲	£525 ▲
27-30 metres (88-100ft)	£1,433 ▲	£950 —	£1,825 ▲	£2,567 ▼
Over 30 metres	£1,875 ND	£1,750 ND	£2,000 ND	£3,500 ND

Utilisation and percentage of initial cost

Push around scissor lifts

Platform Height	Utilisation	
	2021	trend
Push Around Lifts (Pop Ups etc)	69%	▼
Portable Push Around (AWP/UL)	67%	▲

Trailer lifts

Platform Height	Utilisation	
	2021	trend
12-13 metres (30-43ft)	61%	▲
17 metres (50ft)	64%	▲
Over 20 metres (65ft)	65%	▲

Mast booms

Platform Height	Utilisation	
	2021	trend
8 metres	63%	▲
10 metres	65%	▼
12 metres	85%	▲

Spider lifts

Platform Height	Utilisation	
	2021	trend
Up to 15 metres	67%	▼
16-20 metres	65%	▲
20-26 metres	53%	▼
28-30 metres	54%	▼
30-35 metres	60%	▼
Over 35 metres	70%	▲

Vehicle mounted lifts

Platform Height	Utilisation	
	2021	trend
Up to 13 metres	79%	—
13-15 metres	76%	▼
Over 15 metres	60%	▼

Truck mounted lifts

Platform Height	Utilisation	
	2021	trend
Up to 25 metres (3.5 tonne) no operator	72%	▲
22-35 metres (7.5 tonne) with operator	60%	—
36-45 metres with operator	90%	▲
46-60 metres with operator	88%	▲
61-70 metres with operator	50%	▲
Over 70 metres with operator	70%	▼



Diesel bi-energy scissor lifts

Platform Height	Utilisation	
	2021	trend
8 metres (26ft)	68%	▼
9-10 metres (30-33ft)	70%	▲
11-12 metres (36-39ft)	65%	▲
13-17 metres (42-55ft)	60%	▲
18-22 metres (60-72ft)	72%	▼
Over 22 metres (72ft)	70%	▲



Electric self-propelled scissor lifts

Platform Height	Utilisation	
	2021	trend
Up to 5 metres	68%	▲
6 metres (19/20ft)	80%	▲
8 metres (26ft)	70%	▲
9-10 metres (30-33ft)	69%	▲
11-12 metres (36-39ft)	73%	▲
13-17 metres (42-55ft)	63%	▲
18-22 metres (60-72ft)	66%	▲
23-25 metres (75-82ft)	71%	▼
Over 26 metres (85ft)		

Electric self-propelled booms

Platform Height	Utilisation	
	2021	trend
Up to 11m (industrial)	75%	▲
10-12m (32-40ft) (Nifty/AB38)	70%	▲
14-15m (46-49ft)	61%	▼

RT articulated booms

Platform Height	Utilisation	
	2021	trend
12-14 metres (39-45ft)	78%	▲
15-16 metres (49-52ft)	75%	▲
17-19 metres (56-62ft)	68%	—
20-23 metres (65-70ft)	67%	▼
24-26 metres (80-86ft)	80%	▲
Over 27 metres	65%	▲

Straight telescopic booms

Platform Height	Utilisation	
	2021	trend
Up to 17 metres (26ft)	55%	▲
20-23 metres (60-70ft)	52%	▼
24-26 metres (80-86ft)	42%	▼
27-30 metres (88-100ft)	70%	▼
Over 30 metres	69%	▼



Access respondent's comments

As with cranes we received plenty of comments from access rental companies this year. The main themes concern the need to increase rates and the seeming inability of many companies to do so, including apparently, the major players which ought to be showing leadership.

"Some companies are still trashing rates while their costs climb by the week."

"They have to go up - a Z45 diesel boom cost 30k in 2019, the same machine is 41k today!"

"Rental rates in Ireland will remain the same or go down due to big companies and new entrants i.e. Briggs, Baloo hire, HSS, Laois, Aerial acquisitions and will put machines out at any price to gain market share and justify the takeover. This will change as there will always be a rental market for the small personal operator and the cycle will begin again."



"With demand high it's a great opportunity to increase hire rates but sadly there are still hire companies that cut rates unnecessarily."

"Too many people racing to the bottom. Brokers are driving down margins with little or no overheads."

"For more than 15 years interest rates have been very low allowing companies to take on more risk/debt. Now they are bound to rise, and with inflation maybe faster than many might expect? If they do there is trouble ahead."

"Rates have remained consistent for a number of years, but given current inflationary pressures, an element of asset cost increase has had to be passed onto customers. This will likely continue in 2022/23. We continue to invest to provide a modern, well maintained fleet."

"Ruined by National companies charging too little in an effort to grab land at all costs. Same equipment in Germany goes out at almost double the rate."

"Far too low given the rising costs. The biggest risk to the industry is increased transport costs. The market needs to be realistic on the costs of transport and all move forward together."



"The market remains buoyant, and I believe this is the best opportunity in my career to see the rates increase within the market."

"It seems that some hire companies are offering equipment to 'Middlemen' at well below their own agreed rates, allowing them to be undercut by their own machines!"



HGV drivers are getting pay rises of 11% or more because there is a shortage, demand for access equipment is strong, certain machines are hard to get hold of, yet prices have hardly budged. Are all these whizzo business owners and their sales people incompetent? Perhaps we should train them as HGV drivers and put some of these drivers into the sales team?

"Bonkers! Very little sign of leadership from the big players in all aspects of plant & tool hire in raising rates. Welfare & accommodation are the only sector we see raising rates. Only caveat to that is the rates when cross hiring are quoted much higher to us now."

Fuel, wages, spare parts, office equipment, electricity, heating oil and consumables are all getting more expensive by the week. Contractors are facing price increases for materials of 30 to 50 percent and paying it! Yet we in the hire game can't make a 10% price increase stick!

"The market has never been so busy. The Access link raised its hire rates between 9% to 14% dependant on machines."

"Chose the right kit like all-electric RT scissors or booms, or specialist machines that the bottom feeders do not have and don't be afraid - demand an economic rate. Contractors want and need the better machines."

"I have decided now if we don't get a commercial rate it stays in the yard, and I don't give a damn. Looking out of the window today, there is not much sitting there. We do not actually appear to be losing much, if anything. Be proud to ask for a fair and economically viable rate."

"There are too many 75 and 90 metre truck mounted platforms in the UK for the amount of demand. Rates are dropping and there are too many poor sales people that sell tenners for fivers! The rest of the access market is doing well and looks busy."



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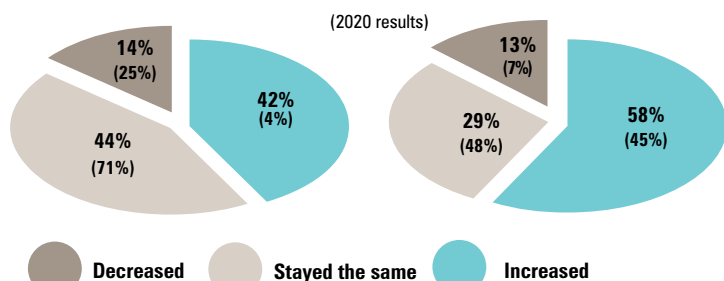
The specialist advisory for selling hire businesses

Telescopic handler rental rates

Rate trends

In the past 12 months rental rates have:

In the next 12 months rental rates will:



In the past 12 months Rental Rates have:

The overall impression of doom and gloom in the telehandler sector - as can be seen from the respondent's comments - is not quite borne out by the actual figures. Last year just less than half predicted that rates would increase and almost half that they would stay the same. According to this year's figures, this has indeed happened however perhaps the level of increase is causing concern when compared to costs increases?

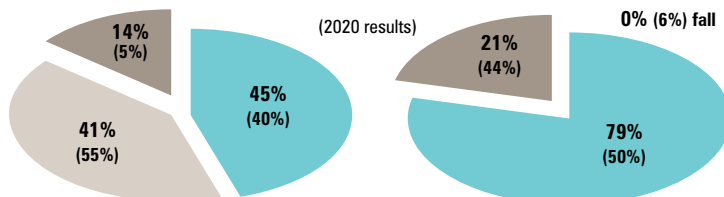
In the next 12 months rates will:

This may well be the case as the vast majority - 58 percent - predict a further rise in rates this year, although worryingly 13 percent think rates will fall which could result in some companies dropping them from their product lines, given the strong resale values. As with the crane and aerial lift markets, rates clearly need to improve, even if only to keep up with price increases on equipment, labour and materials.

Fleet size

In the past 12 months rental rates have:

In the next 12 months rental rates will:



In the past 12 months Rental Rates have:

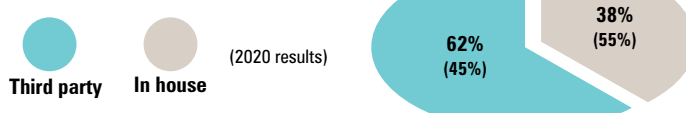
As in last year's survey, respondents were roughly split down the middle, between those that say they have expanded their fleets in 2021 and those that simply maintained them - all largely in line with last year's predictions.

In the next 12 months rates will:

Astonishingly, given the comments on page 37, almost 80 percent of respondents claim that they are planning significant capital investment in fleet expansion this year. Possibly by getting in early with their orders and banking on others having to wait, while the long promised building and infrastructure spending boom takes off. If it does not work out, they are still likely to have a valuable asset on their hands.

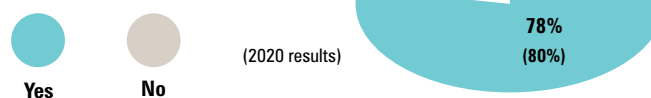


Who does your LOLER Thorough Examinations?



The progressive trend towards Third Party Thorough Examinations was reversed last year as the 2020 Covid Lockdowns took effect and companies brought it back in-house. With the market returning to some form of normality last year, it reverted to the longer term trend, with almost two thirds reporting that they used external inspection companies.

Would you recommend the access industry to your children?



Oddly the number of respondents saying Yes has declined slightly. On reflection perhaps last year's results were the odd ones out? However, they give a definite thumbs up for the industry, reflecting confidence in the sector and perhaps a realisation that it does have a great deal to offer.

Average fleet age in years

Average	Lowest	Highest
2 (2.9)	1.2 (2)	3.1 (4.4)

Interestingly most fleet owners reported a reduction in the average age of their fleets. Possibly due to the high prices obtainable for three to four year old machines last year. While long lead times on replacement machines may have led to deliveries later in the year?

Percentage of units going out with work platform attachments:

From last year rates have gone
 ▲ up ▼ down — same

Type	Average	Lowest	Highest
Fixed frame	2% ▼	0% ▼	10% —
360 degree	3% ▼	0% —	15% ▼

This result rarely changes by much, and always surprises us, given how many people still use telehandlers as a makeshift access platform.





What other products do you provide?

Cranes	Access	General equipment	Tools	Vehicle hire
6% (9%)	49% (65%)	59% (65%)	29% (40%)	24% (20%)

(2020 results)

This result is more reflective of who responds each year rather than anything significant. It has actually bounced back towards the 2019 results which may have some significance.

Weekly rental rates for telehandlers

Fixed frame

From last year rates have gone
 ▲ up ▼ down — same

Lift height	Average (£)	Lowest	Highest	Ideal
Up to 5 metres	282 ▲	200 ▼	350 ▲	327 ▲
5-7 metres	298 ▲	200 —	410 ▲	299 ▼
8-10 metres	333 ▲	220 ▲	500 ▲	352 ▼
11-13 metres	374 ▲	250 ▲	480 ▲	371 ▲
14-15 metres	426 ▲	400 ▲	480 ▲	494 ▲
16-18 metres	531 ▲	360 ▲	595 ▲	516 ▲
Over 18 metres	668 ▲	625 ▲	687 ▲	803 ▲

360 degree

Lift height	Average (£)	Lowest	Highest	Ideal
Up to 20 metres	980 ▼	920 ▲	1,120 ▲	1,383 ▲
20-25 metres	1,400 ▲	1,080 ▼	1,500 ▲	1,810 ▲
Over 25 metres	1,495 ▼	1,200 ▼	1,800 ▼	2,330 ▲

Heavy Duty

Lift height	Average (£)	Lowest	Highest	Ideal
6-7 tonne	666 ▼	600 ▲	770 ▼	844 ▲
8-9 tonne	775 ▼	630 ▼	900 ▼	1,221 ▲

Respondent's comments

"Rates have picked up this year and we are busier, that's a fact, but when you look at the cost increases we are faced with that we cannot avoid, they have actually gone down! Combine that with the cost of new machines and..... We have similar issues with other kit, the problem is that unlike the material suppliers we have competitors out there with new machines who are putting them out for silly money - some of them even publish their silly rates on their website!"

"Good second-hand prices on three year old machines has really made a difference and almost makes it an attractive proposition, but then you realise that you need to have replacement machines on order well before the disposal date, then there is the price, but finance rates from the manufacturers makes it all work."

"The key requirement with telehandlers is to keep them out with good customers who do not abuse them but will keep them onsite for extended periods. If utilisation exceeds 85% and the customer is fair all is OK - not great but OK. Poor utilisation and customer abuse is the road to bankruptcy. We have barred some companies from hiring our telehandlers based on previous experience. Oh and they also seem to be the worst payers!"



Utilisation and percentage on initial cost

Fixed frame

Lift height	Average	Lowest	Highest
Up to 5 metres	74%	60%	75%
5-7 metres	76%	65%	95%
8-10 metres	72%	65%	80%
11-13 metres	63%	55%	75%
14-15 metres	69%	65%	75%
16-18 metres	73%	65%	80%
Over 18 metres	82%	70%	90%

360 degree

Lift height	Average	Lowest	Highest
Up to 20 metres	64%	60%	70%
20-25 metres	66%	60%	75%
Over 25 metres	77%	70%	85%

Heavy Duty

Lift height	Average	Lowest	Highest
6-7 tonne	74%	60%	85%
8-9 tonne	69%	60%	75%



"Telehandlers are the worst return on investment. Rates do not seem to be improving, but the cost of equipment increases year on year."

"Rates are still very competitive in the telehandler market, this reduces 'return on investment'. The resale values are helping supplement the products overall full life profitability, but if these resale values fall then the hire rates can only go up otherwise the product will become unsustainable."

"We appear to be offering telehandlers as a service to our customer base rather than to generate a profit!"

"Many years ago, we decided to focus on more specialist equipment and leave the 13 and 17 metre market to the big guys. That has paid dividends and we are closer to our customers now with high capacity models, some rotos, the sub-compacts and now the electric models that are coming out. We also find that having a range of attachments helps too."

