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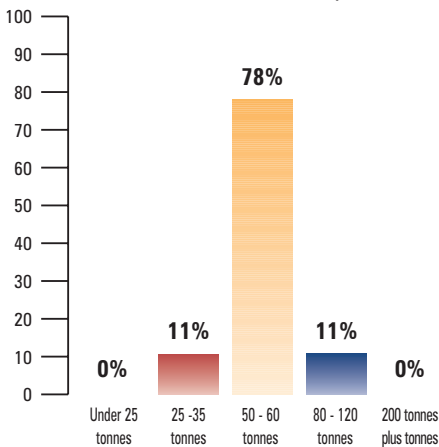
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# Hire Rates Survey 2004

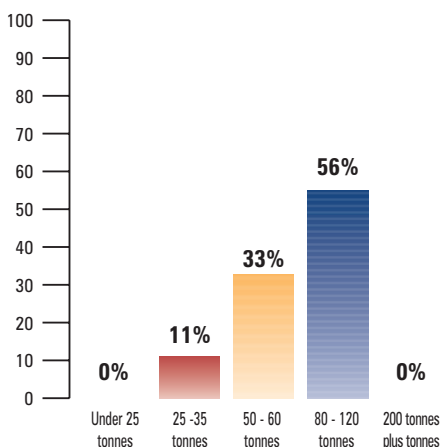
Those now familiar with the annual C&A Hire Rates Survey will notice a more defined listing this year with a more comprehensive equipment category breakdown. Readers are invited to browse at leisure over the following pages for C&A' annual crane and access equipment hire industry 'health check'.

For the next part of the survey, those same companies were asked to indicate which capacity cranes provided them with the best physical utilisation rates, against those which have given the best financial returns for the past 12 months. For the 2004 survey, we have redefined the crane capacities and produced an extra two categories.

**Fig 5.** Cranes giving the best physical utilisation rates annually

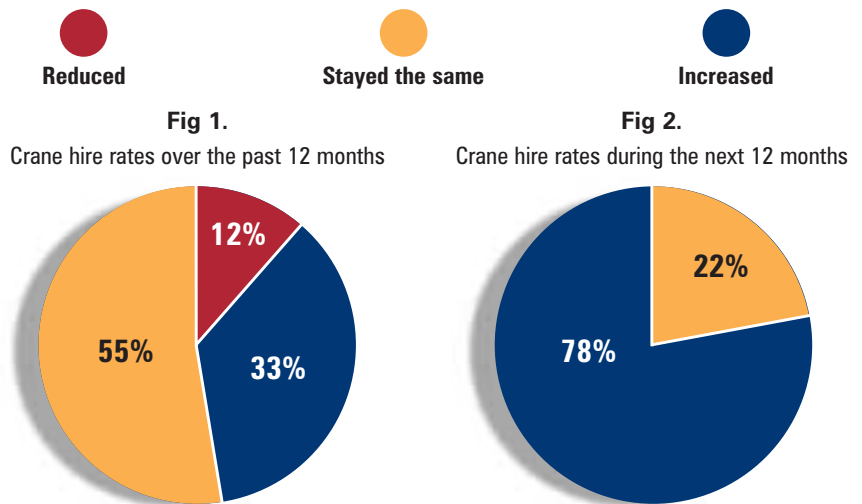


**Fig 6.** Cranes giving the best financial returns



## crane rates

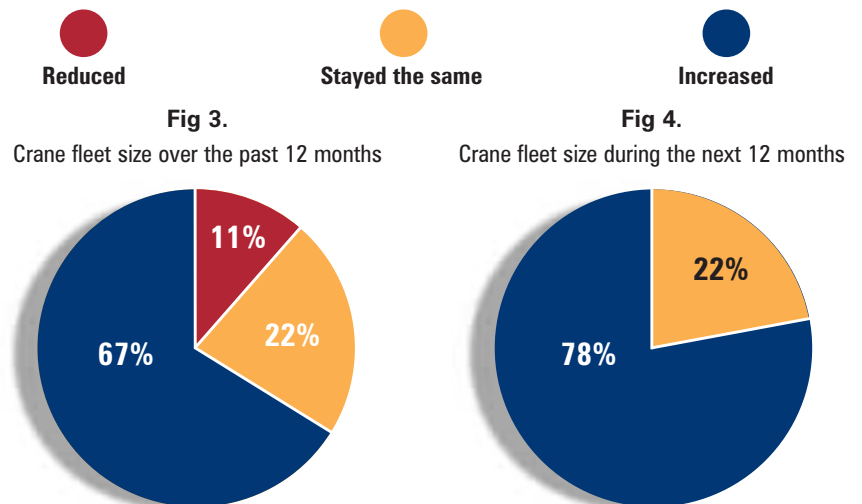
We kick start this year's survey with a look at what has happened to UK and Ireland crane hire companies' rental rates over the past 12 months, and what they expect to happen to them in 2005.



**Comment:** In last year's survey, not one crane hire company in the UK or Ireland saw its hire rates fall during the previous 12 month period. This changes this year as 12 percent of respondents reported a drop in rates in 2004. Perhaps the most significant difference though is that just 33 percent of this year's respondents increased their rates in 2004, compared with a massive 73 percent in 2003.

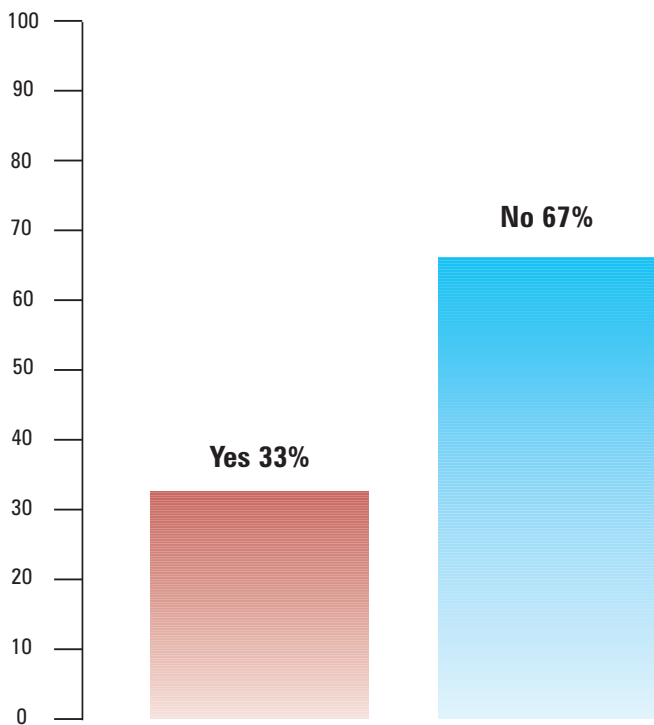
Despite the drop in hire rates increases though, our 2004 respondents remain optimistic for the future with 78 percent predicting that rates will increase during 2005.

Turning to crane hire company fleet sizes, investment in new equipment is always a relatively secure way of gauging just how healthy an industry is at a particular point in time. Here we asked companies to tell us what strategies they have employed in terms of their fleets during the past 12 months, and whether their plans are any different for 2005.



**Comment:** Last year, 73 percent of respondents were expecting to increase their fleet size this year and almost all kept their word. 67 percent of this year's respondents reported investing in their crane fleets in 2004, while a promising 78 percent expect to continue the trend next year. While the remaining 22 percent are happy with their fleet size for the time being, not one company said that it would reduce the number of cranes in its fleet in 2005.

**Fig 7.** Would you recommend the crane hire industry to your children?



**Comment:** Our traditional, 'Would you recommend the crane hire industry to your children?' question has delivered a rather despondent reply this year compared to last year, where an optimistic 55 percent of respondents took the 'yes' vote. The events of the past 12 months have seemingly changed the minds of many with just 33 percent willing to nurture their young into the crane hire industry.

Next up and the most popular part of the survey is our breakdown of the crane hire rates that have been quoted to hirers during 2004 and those that are currently being charged by UK and Ireland crane hire companies.

**Fig 8.** Average weekly hire rates for mobile cranes

Capacity	Lowest weekly rate	Highest weekly rate	Average weekly rate
under 25 tonnes	£1,200	£6,559	£2,192
25 – 35 tonnes	£1,400	£8,285	£2,588
50/60 tonnes	£2,080	£10,357	£3,638
80 – 120 tonnes	£3,000	£17,951	£5,843
200 tonnes plus tonnes	£5,110	£24,169	£7,683

**Comment:** The figures are difficult to compare with last year's results as we have taken the decision to rearrange the categories to give a more accurate breakdown of rates for certain sized cranes this year.

At a glance, however, the results seem to support the above response that only 33 percent of crane hire companies increased their rates last year, for instance the average rate for a 100-tonne capacity crane was £5,382. This year, a 80- to 120-tonne unit would be marginally more expensive at an average of £5,843.

# industry comments

*"The Irish crane industry is saturated with cranes over 200 tonnes so rates are very low. Small crane rates are holding well because of the volume of work being carried out at the moment."*

*Crane professional*

*"Cranes are still priced low in consideration of other plant and labour."*

*Crane professional*

*"Crane rates must rise to keep in line with a six percent increase in labour and 10 percent increase in cranes."*

*Crane professional*

*"Too many people in the industry who make a mess of it for others."*

*Crane professional*

*"Rates too low (our fault)."*

*Crane professional*

*"Still based on rates used ten years ago. Should be much higher."*

*Crane professional*

*"Large crane rental companies reducing rates to give national coverage and gain domination of market. If this works, then in time rates will increase, by which time the smaller companies will have been forced out of business."*

*Crane professional*



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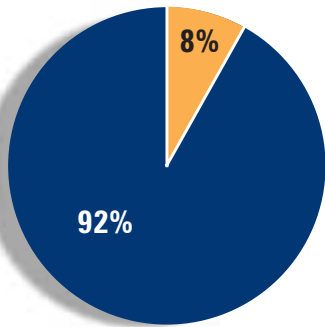
# access rates

The access segment of the 2004 Hire Rates Survey has been beefed-up this year to include numerous additional categories under the 'average weekly hire rates' section. The following charts have been researched to give the reader an idea of what has happened to hire rates for access equipment during the past 12 months, and also to give an idea of what the industry's platform hire companies are expecting to happen in the following 12 months.

● Reduced      ● Stayed the same      ● Increased

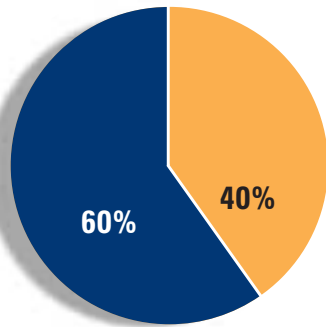
**Fig 9.**

Access hire rates over the past 12 months



**Fig 10.**

Access hire rates during the next 12 months

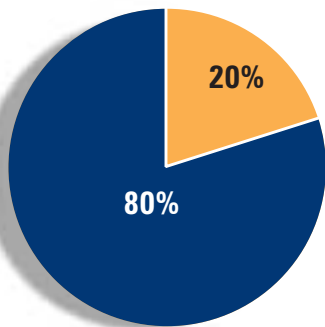


**Comment:** 40 percent of last year's respondents were expecting access equipment hire rates to increase this year, and they were right. According to this year's respondents, 92 percent reported an increase in its hire rates. But, the question is by how much. Judging by the industry comments dotted throughout the survey, not enough - "we have seen an excellent improvement in hire rates over the past 12 months, and we still feel there is room for even more over the next 12 to 24 months", said one access industry professional.

● Reduced      ● Stayed the same      ● Increased

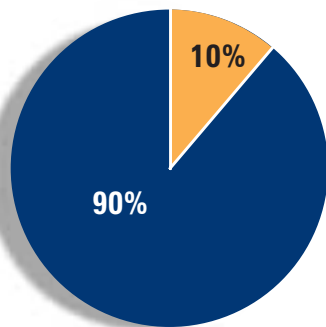
**Fig 11.**

Access fleet sizes during the past 12 months



**Fig 12.**

Access fleet sizes during the next 12 months



**Comment:** Last year, 90 percent of respondents reported an increase in their fleet size in 2003 with the same 90 percent expecting to continue the trend in 2005. According to this year's survey, 80 percent of them have done. Not one company reduced its fleet size during the same period and is unlikely to in 2005. 90 percent of respondents said that they will be adding equipment to their hire portfolios during the next 12 months.

As with the crane hire rates section, the next two tables highlight the platforms that hire companies believe have given them the best physical utilisation rates during the past 12 months, compared to those giving the best financial returns.

Using the scale, '1' being the best and '5' being the worst, respondents were asked to give their top 5 equipment categories. The results were then combined for each category to give the final scores in Figures 13 and 14.

**Fig 13.** Best physical utilisation

Category	Score
small electric scissors	1
45 ft articulated booms	2
small electric booms	3
larger trailer lifts	4
small diesel scissors 10 m under	4
big articulated booms (60/80 ft)	5

**Fig 14.** Best financial return

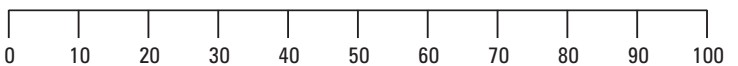
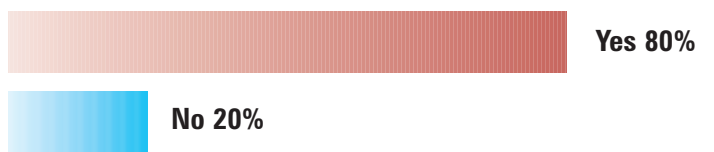
Category	Score
small electric scissors	1
small electric booms	2
45 ft articulated booms	3
larger trailer lifts	4
mid to large electric scissors	5

**Comment:** The jury's out. According to our 2004 respondents, small electric scissor lifts have given them the best physical utilisation and the best financial returns to boot over the past 12 months. In the best physical utilisation chart, 45-foot articulated booms, which 54 percent of last year's respondents claimed gave them the best utilisation in 2003, came in a close second. Small electric scissors took the number two spot last year with a backing of 22 percent.

Small electric scissors also provided the best financial returns in last year's survey, taking 54 percent of the votes. Providing the second best financial returns in 2004 were small electric booms, taking the place of joint second place holders last year, 45-foot articulated booms and electric bi-energy articulating booms, with a 15 percent each.

Just like with the crane industry we once again get personal with the crunch question, would you put your business where your mouth is and recommend the access industry to your children?

**Fig 15.** Would you recommend the access industry to your children?



**Comment:** Unlike the crane industry though, the majority of access industry professionals would be more than happy to see their young ones follow them into the access equipment hire market.

# industry comments

***“The industry still has its band of unprofessional low hire rate merchants. However, their demise is but a phone call away from a bank or investor. Maybe they will learn one day that low hire rates, poorly maintained equipment and low service levels does not win in the end.”***

*Access professional*

***“Still buoyant in East Anglia, but lead in time from suppliers now creating a problem. We still take the cautious approach.”***

*Access professional*

***“Due to increased users, improved health and safety and the demise of some established MEWP hire companies, we have seen an excellent improvement in hire rates over the past 12 months, and we still feel there is room for even more over the next 12 to 24 months.”***

*Access professional*

***“Still access capacity and marginal returns, but very good potential for growth and improved returns.”***

*Access professional*

***“At last, the hen’s come home to roost! A shame though that badly run companies manage to rise from their self inflicted ashes and continue to line their own pockets at the expense of those running professional operations.”***

*Access professional*

***“We have an extremely positive outlook on the industry as a whole, and for us, for the next two to three years.”***

*Access professional*

Fig 16.

Electric scissors	Average weekly hire rates
under 5 metres	£105.00
6 m	£107.80
8 m	£129.40
10 m compact	£151.60
10 m plus	£226.50
Scissors diesel bi-energy	Average weekly hire rates
8 – 10 m	£140.20
10 – 14 m	£172.60
14 m plus	£233.60*

Fig 17.

Electric booms	Average weekly hire rates
under 11 m	£226.40
10 – 14 m	£232.00
14 m plus	£233.60
Mast booms	
6 m	£125.00
8 m	£160.00
Rough terrain articulating booms	
15 – 16 m	£255.60
20 – 25 m	£336.25
25 m plus	£565.00
Straight booms	
under 17 m	£234.00
18 – 23 m	£335.00
25 – 29 m	£571.25
30 m plus	£1,075.00
Trailer lifts	
12/13 m	£167.50
17 m	£247.30
over 20 m	£500.00
Van mounts	
all sizes	£375.00
Truck mounts	
under 22 m/3,500 kg	£425.00
23 – 35 m	£420.00
36 m plus	£700.00

\*Respondents reported that diesel scissors with full spec and seven-metre plus dual extended decks typically fetch around £100 more than standard units of the same height.