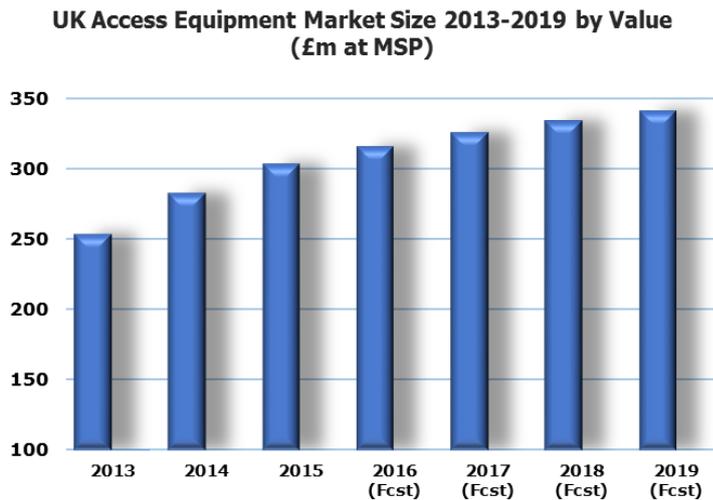




## PRESS RELEASE

### Good growth forecast in the UK powered access equipment market

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The UK access equipment market was estimated to have grown by 7% in 2015, followed by further growth of 4% in 2016, according to a new report released by AMA Research. Overall, powered and specialist access equipment is estimated to account for around 57% of the market in 2015, with non-powered access equipment accounting for the remainder. Following a stagnant period, the market returned to growth in 2012, experiencing particularly sharp growth in 2014, with slightly lower growth in 2015/16.

This growth was initially driven by an improvement in the powered access equipment sector, although the non-powered sector also increased in value in 2014, largely in response to higher output in housebuilding. However, powered access equipment has continued to enjoy faster growth overall than non-powered equipment, as safety considerations and the increasing range and penetration of powered products in the low-level access sector continue to erode the share of non-powered equipment.

The access equipment market is influenced by the relative health of key end-use sectors, principally new build construction. In addition to housebuilding, the key construction sectors that have contributed to growth have included infrastructure, offices and industrial. Powered access and non-powered access products compete for similar work and, within each separate sector, products also compete directly, for example, access towers, scaffolding and ladders.

The rental sector is a key purchaser of access equipment, particularly in the MEWP sector, which represents the largest segment of the overall market. This has been particularly relevant in recent years as hire companies have sought to renew and expand their fleets in response to improving economic prospects, along with growth in construction output.

Legislation on safe working at height, most notably the 'Work at Height Regulations 2005', continues to impact the UK market for access equipment, driving demand for safer products. Tighter emissions regulations, most recently the European Stage IV emission standards, which came into force in 2014, have also added value to the market, as purchasers seek to replace older products with compliant equipment, such as hybrid powered machines.

Within the powered access sector, MEWPs account for the majority share, with an estimated share of around 50% in terms of value. In the non-powered sector, aluminium dominates the ladders materials mix, but GRP has gained market share and is increasingly seen as a mainstream product, not just one for applications where non-conductive materials are necessary.

*"Going forward, the powered access equipment market is forecast to perform better than the non-powered sector, particularly towards the latter part of the decade, as the non-powered sector is more mature with less scope for product development"* said Hayley Thornley, Market Research Manager at AMA Research. *"After a period of comparative price stability, some future price rises are expected, also adding value to the market across the review period."*

Prospects for the construction industry continue to appear positive, although lower growth rates are expected compared with 2015 and 2016. Growth in construction output will generate market opportunities for access equipment, especially in the housebuilding and infrastructure sectors, which are likely to be boosted by government measures. However, UK business confidence remains fragile, and in addition, the access equipment market can fluctuate, being influenced by fleet buying decisions in the relatively volatile MEWP sector, leading to erratic levels of growth. From 2017, growth is expected to continue at an average 3-4% a year until 2020.

The '**Access Equipment Market Report – UK 2016-2020 Analysis**' report is published by AMA Research, a leading provider of market research and consultancy services with over 25 years' experience within the construction and home improvement markets. The report is available now and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.

#### **Editors Note:**

If you would like to receive more information on the report, or would like to speak to the author, then please contact Anna Eriksson or Hayley Thornley on 01242 235724.

Please include our web address and telephone number on any review printed, and it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

AMA Research Ltd  
Montpellier House  
Montpellier Drive  
Cheltenham  
Gloucestershire GL50 1TY  
Tel: +44 (0)1242 235724  
Fax: +44 (0)1242 262948  
E-mail: [annaeriksson@amaresearch.co.uk](mailto:annaeriksson@amaresearch.co.uk)  
Website: [www.amaresearch.co.uk](http://www.amaresearch.co.uk)