

Plant Hire Market Report - UK 2018-2022

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Introduction and Overview

The 11th edition of the '**Plant Hire Market Report - UK 2018-2022**' reviews developments within the industry, with emphasis on market assessment. Recent trends, key influencing factors and forecasts of future developments are assessed and the report also reviews the product mix offered by hire companies.



Key issues covered in the report:

- Plant hire market in the UK highlighting key organisations and factors affecting market performance.
- Product groups analysis includes the following sectors:
- Earth moving - excavators, dump trucks, site dumpers, etc.
- Lifting - cranes, powered access, material handling equipment.
- Pumping, crushing and screening plant.
- Road making equipment - rollers, pavers, planers, etc.
- Generators, compressors, lighting and welding.
- Others/non-mechanical plant - heating, cooling & drying, portable accommodation, etc.

Areas of particular interest:

- Review of market performance 2013-2017 - influences including non-residential construction, housebuilding, events, waste management, etc.
- Forecasts for performance of the UK Plant Hire Market 2018-2022.
- Product sector review - analysis of hire market by product group (as above).
- Review of market structure and major plant hire companies.
- Major equipment suppliers by hire sector product group.
- Detailed market data and insight on the plant hire market by AMA Research, a leading UK provider of construction market intelligence.

Some of the companies included:

AB 2000, AFI Uplift, Aggreko plc, Ainscough Crane Hire, Ambrose Plant Hire, Andrew Sykes Hire, Ardent Hire, Ashtead Group plc, Atterbury UK Ltd, B&T Plant Hire, Beck and Pollitzer Engineering, Blackwood Plant Hire, Boels Rental, Briggs Equipment, Camfaud Concrete Pumps, Charles Wilson Engineers, Clive Barford Limited (CBL), Finning (UK), Gap Group, Garic, Generator Power, Hawk Plant Hire, HE Group, King Lifting, Liebherr-Rental, L Lynch, Quattro Plant Limited, Mammoet UK, M J Church (Plant), Morris Leslie Plant, Nationwide Platforms, P. Flannery Plant Hire, Readypower Rail Services, Select Plant Hire, Selwood, Speedy Hire plc, Turner & Co, TXM Plant Limited, VP plc, Weldex, Wernick Group, and more.

THE MARKET

- Market definition of plant hire companies and products included.
 - Market trends 2013-2017 - factors influencing market development (levels of construction activity, infrastructure developments, waste management & environmental factors, legislation, events, distribution & warehousing, impact of hire rates & periods etc.). Forecasts of market size up to 2022.
- Market prospects for hire market - impact of construction and non-construction activity, including domestic and non-domestic construction e.g. infrastructure (including transport and utilities), offices, waste management, distribution, etc.

HIRE COMPANIES

- Overview of supply structure - competitive, fragmented sector with most players operating in relatively limited product sectors due to the high number of specialist operators.
- Market shares of major hire companies - major players, increasing shares through acquisitions and organic growth.
- Review of major hire companies - turnover, branches, areas of specialisation etc.

PRODUCTS/SUPPLIERS

- Product groups analysis includes the following sectors:
 - Earth moving - excavators, dump trucks, site dumpers, etc.
 - Lifting - cranes, powered access, material handling equipment.
 - Pumping, crushing and screening plant.
 - Road making equipment - rollers planers, pavers, trenchers.
 - Generators, compressors, lighting and welding.
 - Others/non-mechanical plant - environmental (heating, cooling & drying), portable accommodation and 'other' equipment.
- Product mix within major product groups - analysis by major sectors, share by sector, key trends.
- Product trends by product group - growth sectors etc.
- Review of hire product sectors by type of hire company - plant hire, tool hire and specialist.
- Major equipment suppliers by hire sector product group.

Report Summary

The UK plant hire market experienced modest growth to 2013, but then increased significantly in 2014 due to improvements in both housing and non-residential building markets, as well as manufacturing and other non-construction end-use sectors.

Since then, the market has continued to grow, although at lower annual growth rates.

AMA's definition of the market relates to equipment hire only and excludes ancillary services (fuel, labour, transport etc.), which can add substantial value in some hire sectors, such as generators and cranes. Infrastructure remains the key end-use sector, although there have been differences between parts of the infrastructure sector in recent years.

This is a competitive market and the continuing high levels of competition have impacted on hire rates, which have been relatively static in recent years. The level of hire is also dependent on companies opting to hire rather than buy, with many companies choosing to hire plant and tools, generally to avoid risk.

It is estimated that construction accounts for around two-thirds of the plant hire market, with the remaining share accounted for by the non-construction sector. As a result, demand for plant hire is heavily dependent on the level of construction activity and market performance over the 2012-2017 period reflects the volatility of the sector. Current prospects for the plant hire market into the medium-term remain moderately optimistic.

List of Contents

Contents Listing

- 1. INTRODUCTION 6
 - 1.1 BACKGROUND 6
 - 1.2 SOURCES OF INFORMATION 6
- 2. SUMMARY AND MARKET PROSPECTS 8
 - 2.1 SUMMARY 8
 - 2.2 MARKET PROSPECTS 9
- 3. ECONOMIC ENVIRONMENT 11
 - 3.1 GDP 11
 - 3.2 INFLATION & INTEREST RATES 12
 - 3.3 UNEMPLOYMENT 13
 - 3.4 HOUSEHOLD CONSUMPTION 14
 - 3.5 HOUSING & CONSTRUCTION 14
 - 3.6 STERLING 15
 - 3.7 POPULATION PROFILE 16
 - 3.8 CONCLUSIONS 16
- 4. PLANT HIRE MARKET 17
 - 4.1 DEFINITION 17

4.2 MARKET STRUCTURE	18
4.3 MARKET SIZE	19
4.3.1 Background and Recent Performance	19
4.3.2 Market Prospects	22
4.4. KEY MARKET INFLUENCES	26
4.4.1 Overview	26
4.4.2 Non-residential Construction	27
4.4.3 Housebuilding	32
4.4.4 Non-construction	34
4.4.5 Legislation	36
4.5 HIRE SECTOR OVERVIEW - PLANT HIRE, TOOL HIRE AND SPECIALISTS	38
5. PLANT HIRE COMPANIES	40
5.1 MARKET STRUCTURE	40
5.2 SUPPLIER SHARES	41
5.3 COMPANY PROFILES	43
6. PRODUCTS	49
6.1 PRODUCT MIX	49
6.2 HIRE PRODUCT GROUPS	50
6.2.1 Earth Moving Equipment	50
6.2.2 Lifting Plant	54
6.2.3 Pumping, Crushing and Screening Plant	60
6.2.4 Road-Making Equipment	63
6.2.5 Generators, Compressors, Lighting & Welding	66
6.2.6 Others/Non-Mechanical Plant	71

Tables & Charts

CHART 1: UK PLANT HIRE MARKET SIZE 2013-2022 - BY VALUE (£M AT HIRE MARKET PRICES) 8
TABLE 2: GDP DATA - 2015-2018 - KEY CONSTITUENT ELEMENTS 11
CHART 3: INTEREST RATES AND INFLATION (CPI) FROM 2000-2022 13
CHART 4: PDI & SAVINGS RATIO AT CURRENT PRICES 2000-2022 14
TABLE 5: EXCHANGE RATE FLUCTUATIONS 2014-2020 - STERLING TO THE DOLLAR, AND THE EURO, SPOT RATES 15
CHART 6: UK PLANT HIRE MARKET DISTRIBUTION STRUCTURE 18
TABLE 7: UK PLANT HIRE MARKET 2013 TO 2022 AT HIRE MARKET PRICES (£M) 20
CHART 8: FORECAST OF NEW WORK CONSTRUCTION OUTPUT SECTOR DEVELOPMENTS 2017 TO 2022 - % CHANGE 25
CHART 9: NON-RESIDENTIAL CONSTRUCTION OUTPUT (GREAT BRITAIN) 2013 TO 2022 - BY VALUE (£ BILLION AT CURRENT PRICES) 27
CHART 10: NON-RESIDENTIAL CONSTRUCTION OUTPUT NEW WORK SECTOR MIX (INFRASTRUCTURE, EDUCATION, OFFICES, RETAIL ETC) % BY VALUE 2017 & 2022 28
CHART 11: NON-RESIDENTIAL CONSTRUCTION RMI OUTPUT MIX 2013 TO 2022 - BY VALUE (£BN AT CURRENT PRICES) 29
CHART 12: INFRASTRUCTURE OUTPUT BY SECTOR (ROADS, RAILWAYS, WATER, ELECTRICITY, ETC) 2017 - % BY VALUE (%) 30
CHART 13: VALUE OF ROAD & RAIL CONSTRUCTION OUTPUT 2010-2017 (£M AT CURRENT PRICES) 31
CHART 14: UTILITIES MARKET GB CONSTRUCTION OUTPUT 2013 TO 2017 - BY VALUE (£BN AT CURRENT PRICES) 32
CHART 15: HOUSING COMPLETIONS (GB) 2013 - 2022 - BY VOLUME (000'S) 33
CHART 16: HOUSEBUILDING COMPLETIONS IN ENGLAND MIX BY TYPE OF DWELLING (HOUSES/FLATS) 2006-2017 - % 34
TABLE 17: UK MARKET FOR CONTROLLED WASTE MANAGEMENT (COLLECTION, TREATMENT & DISPOSAL AND MATERIALS RECOVERY)2010-2021 - BY VALUE (£BN) 35
CHART 18: NUMBER AND RATE OF FATAL INJURIES TO WORKERS IN CONSTRUCTION 2006-2017 37
TABLE 19: ESTIMATED SHARES BY TYPE OF HIRE COMPANY (PLANT, TOOL, SPECIALISTS) BY HIRE PRODUCT SECTORS 38
TABLE 20: MARKET SHARES OF THE UK PLANT HIRE OPERATORS 2017 42
TABLE 21: HIRE COMPANY PRODUCT MIX 2017 - £M AT HIRE MARKET VALUE 49
TABLE 22: UK EARTH MOVING EQUIPMENT HIRE MARKET, 2013-2018 - HIRE MARKET VALUE (£M) 50
CHART 23: PRODUCT MIX - HIRE MARKET FOR EARTH MOVING PRODUCTS 2017-2018 - % BY VALUE 51
TABLE 24: UK LIFTING EQUIPMENT HIRE MARKET, 2013-2018 - BY VALUE (£M AT HIRE MARKET VALUE) 55

CHART 25: PRODUCT MIX - HIRE MARKET FOR LIFTING PLANT - MIX BY CRANES, POWERED ACCESS, MATERIALS

HANDLING AT HIRE MARKET, 2017, % BY VALUE 55

CHART 26: UK POWERED ACCESS EQUIPMENT HIRE MARKET (SCISSORS, BOOMS. TRAILER MOUNTED, VEHICLE MOUNTED ETC) - MIX BY VALUE 59

TABLE 27: UK PUMPING, CRUSHING AND SCREENING PLANT HIRE MARKET, 2013-2018 (£M) AT HIRE MARKET VALUE 61

CHART 28: UK HIRE MARKET FOR PUMPING, CRUSHING AND SCREENING PLANT PRODUCT MIX 2017 - % BY VALUE 61

TABLE 29: UK ROAD-MAKING EQUIPMENT HIRE MARKET 2013-2018 - BY VALUE (£M AT HIRE MARKET VALUE) 64

CHART 30: UK HIRE MARKET FOR ROAD-MAKING PRODUCTS PRODUCT MIX (ROLLERS, PLANERS/PAVERS, OTHERS)2017 - % BY VALUE 65

TABLE 31: UK GENERATORS, COMPRESSORS, LIGHTING AND WELDING EQUIPMENT HIRE MARKET 2013-2018 - BY VALUE (£M AT HIRE MARKET VALUE) 67

CHART 32: UK MARKET FOR GENERATORS COMPRESSORS, LIGHTING HIRE PRODUCT MIX 2017 - % BY VALUE 67

TABLE 33: HIRE MARKET FOR NON-MECHANICAL PLANT - MIX OF ENVIRONMENTAL, PORTABLE ACCOMMODATION AND OTHER EQUIPMENT AT HIRE MARKET VALUE 2017 71

CHART 34: UK HIRE MARKET FOR HEATING, DRYING & COOLING 2017 - % BY VALUE (AT HIRE MARKET PRICES) 73

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