

UK Access Market

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Off-Highway Research

European Construction Equipment Sales

- Down 25% in 2008
- Down 15% in 2009 (prediction)

Worst affected markets

- Spain, Denmark, Ireland and UK
- Rental related markets

Recovery to 2004-2005 levels by 2010 - 2011

Construction Skills Network

Construction Output

- 3% decline 2009
- Nil growth 2010
- 1% growth 2011
- 2% growth 2012
- 3% growth 2013

Average growth of 0.5% over the next 5 years

Davis Langdon Consultancy

Trends in Construction Prices

- Q1 2009 fell 7.5%
- Tender prices fall 5 to 8% over 2009 (forecast)
- 2 year decline
- 12% reduction in construction volume by 2010 (forecast)

Glenigan Index for March 2009

- 23% year on year fall in new construction start ups
- 30% contraction in first half 2009

Market subdued until 2011

Other influential factors

- Consolidation of the rental market
- Council tax
- Modern fleets
- Generalist drop-outs
- Back to scaffold

Affect on manufacturers

- Reduced order books
- Inventory
- Reduced demand for mid-range machines
- Modern fleet
- Finance

Affect on rental

- Slowdown
- Utilisation
- Paying the bank

Outlook

- 2008 access market fell 4%
- 2009 – 2010 deterioration expected to continue
- Moderate growth 2011 and 2012

By 2011 – 2012 UK powered access market worth
£174 million

Opportunities

- Safety and productivity
- Niche products
- Niche marketing
- Truck/van mounts
- Construction

Construction

- Government funding
- Public sector work
- Infrastructure
- Crossrail
- Scotland's 10 year transport plan
- Major station development
- Olympics