



Trade Remedies
Authority

Anti-subsidy investigation on boom lifts from China

Note to public file

Business responses

The TRA conducted an online survey of downstream businesses to help us to understand the economic impacts of potential tariffs paid on boom lifts from China. The survey was open from 02/03/2026 to 02/04/2026. This document sets out the evidence received from this survey.

Number of responses and verification

We received 81 responses. We reviewed these and removed:

- Responses where the business identity could not be verified
- Responses from ineligible businesses
- Responses from outside of the UK
- Duplicate responses
- Incomplete responses

Once these responses were removed, there were 30 business responses. To support clear interpretation of the survey findings, each survey question has been converted into subject-based table headings.

Q1: How do boom lifts relate to your business?

Table 1 shows that, of the 30 responses, there were 12 downstream businesses¹ and 18 upstream businesses². Among the 12 downstream businesses, there were 11 rental companies³ and 1 end-user or consumer⁴.

Table 1: Boom lift business characteristics

Business	Frequency
Downstream businesses	12
Rental companies	11
End-user / consumer	1
Upstream businesses	18
Grand Total	30

Q2: How did you find out about this survey?

Most downstream businesses (67%) reported that they learned about the survey from the email sent by TRA. Among upstream businesses, 44% reported receiving the survey information from the TRA email, while another 44% indicated that they learned about it through manufacturers or other customers (Table 2).

Table 2: Sources of survey awareness

Businesses	Survey awareness	Frequency
Downstream businesses	Email from the TRA	8
	Social Media	1
	Trade Association	3
Downstream business total		12
Upstream businesses	Email from the TRA	8
	News Story	1
	Trade Association	1
	Customers/Manufacturers	8
Upstream business total		18
Grand Total		30

Q3: Please describe what your business does

As mentioned before, among the 12 downstream businesses, 11 were rental companies and 1 was an end-user. Of the 11 rental companies only 6 provided activity descriptions (Table 3). The single end-user respondent identified their activity as construction. Overall, the downstream group was dominated by rental businesses,

¹ Downstream businesses are buyers and users of boom lifts. They include rental businesses, dealers and end users.

² Upstream businesses supply raw materials to downstream businesses.

³ Rental businesses are a type of downstream business that own fleets of boom lifts and rents them out short- or long-term. They handle delivery, maintenance, and support.

⁴ End users/consumers are a type of downstream business that use boom lifts for work, typically in construction, maintenance, or facilities management. They may rent or buy depending on project needs.

with only one company using the equipment directly. All 18 upstream businesses responded to the question. They supplied specialised components and engineering services that support boom lift manufacturing, including FRP/GRP mouldings, hydraulic and electronic parts, sheet-metal and CNC-machined assemblies, plastic finishing products, protective items, control panels, and other industrial components.

Table 3: Business description of downstream and upstream businesses

Downstream businesses	Business description	Frequency
Rental companies	Powered-access hire firms that rent out boom lifts, scissor lifts, and other access platforms.	6
	No response	5
End-user	Construction	1
Downstream business total		12
Upstream businesses total	Supply FRP/GRP mouldings, hydraulic cylinders and components, electronic control systems, sensors, sheet-metal fabrications, plastic finishing products, signage, labels, protective covers, control panels, electrical assemblies, electromechanical parts, CNC-machined components, welding and fabrication services, safety cages, and industrial/automotive parts.	18
Grand Total		30

Q4: Who do you rent boom lifts to?

Table 4 shows that all downstream rental companies rented boom lifts to end users. Of these, 64% (7 out of 11) reported renting only to end-user companies that needed to work at height across construction, industrial and events sectors. The remaining 36% (4 out of 11) rented to both end users and other rental companies through cross-hire.

Table 4: Customer groups for downstream rental businesses

Customer groups	Frequency
End users only	7
Cross-hire (other rental companies) & end users	4
Downstream business (Rental companies total)	11

Q5: Please provide your company's approximate revenue (in Pound Sterling) for the last financial year.

For confidentiality reasons, full responses are not provided here. Downstream businesses reported rental-related revenue ranging from £0.7 million to £450 million in the last financial year, while upstream businesses reported sales revenue ranging from £0.1 million to £727 million.

Q6: Please provide your company's approximate cost of rental product purchases (in Pound Sterling) for the last financial year.

Downstream businesses reported rental product purchases and production costs, ranging from £0.3 million to £5 million in the last financial year.

Q7: Approximately how many UK employees does your company have?

For downstream businesses, the number of UK employees ranged from 2 to 3300. For upstream businesses, responses ranged from 4 to 1200.

Q8: Approximately what percentage of your total revenue in the last financial year was linked to boom lift activity (either through rental income or sales of raw materials to boom lift manufacturers)?

Table 5 shows that among downstream businesses, (8 out of 11, 72%) rental businesses reported that boom lifts accounted for more than 20% of their total rental product revenues in the last financial year. The one end-user reported that boom lift purchases represented approximately 1-10% of their total production costs. In contrast, 8 out of 18, 66% upstream businesses indicated that only 1-10% of their total raw material sales were made to companies manufacturing boom lifts.

Table 5: Boom lift share of purchase costs and raw material sales across downstream and upstream businesses

Downstream businesses	Boom lift share of total rental revenue and purchase costs by downstream businesses	Frequency
Downstream business (boom lift rental revenue)	Greater than 20%	8
	Over 10% up to 20%	2
	Over 1% up to 10%	1
Downstream business (rental) total		11
Downstream business (end-user boom lift production cost)	Over 1% up to 10%	1
Downstream business total		12
Upstream businesses	Share of raw material sales to boom lift manufacturers by upstream businesses	Frequency
Upstream business	Greater than 20%	6
	Over 10% up to 20%	3
	Over 1% up to 10%	8
	Less than 1%	1
Upstream business Total		18
Grand Total		30

Q9: How does your company source boom lifts?

When downstream businesses were asked how they sourced boom lifts, 9 out of 12, (75%) reported buying from UK suppliers. 17% mentioned sourcing from both imports and buying from the UK suppliers (Table 6) and one did not respond.

Table 6: Boom lift sourcing methods

Boom lifts source	Frequency
No response	1
Both, import and buy from the UK suppliers	2
We buy from UK suppliers	9
Downstream business total	12

Q10: Please select all applicable characteristics of the boom lifts you rent out or purchase (lift type, vehicle type, maximum working height, power type, drive type, outreach capability).

Across the 12 downstream businesses, the attributes of boom lifts used or purchased vary widely. The most commonly mentioned attributes were outreach capability (chosen by 8 out of 12 businesses, 67%) and maximum working height (6 out of 12, 50%), but even these still show that a substantial number of businesses selected different specifications. Power type and maximum working height were selected by 6 businesses (50%) and wheel-drive configurations was selected by 5 businesses (42%), indicating mixed preferences across electric, combustion, hybrid systems and different drive setups. Lift type and some wheel-drive combinations were chosen by 4 businesses (33%), while vehicle type options were selected by only 3-4 businesses (25-33%), showing high variation in operational needs. (Table 7).

Table 7: Boom lift features provided by downstream businesses

Components	Attributes	Frequency
Lift type	Articulated/Knuckle lift, Telescopic/Straight (with Jibs), Telescopic/Straight (without Jibs), Spider Booms	4
Vehicle type	Self-propelled	4
	Self-propelled, Self-drive, Track drive/Spider Lift	3
Maximum working height	<15m, 15m - 25m, >25m	6
Power type	Electric battery powered (lithium battery, lead-acid battery), Combustion (petrol, gas, diesel), Hybrid (battery & petrol, battery & diesel, battery & hydrogen), Bio-Energy	6
Wheel drive	2-wheel drive, 4x4, 4x4x4	5
	2-wheel drive, 4x4	4
Outreach capability	Outreach available	8
Downstream business Total		12

Q11: Are your products ever used because of a protected characteristic? Protected characteristics are; age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

All businesses were asked whether their products were ever used by customers because of a protected characteristic. Businesses reported no instances of their products being used by customers with protected characteristics.

Q12: Question for upstream business - Please tell us how a potential tariff on boom lifts from China would affect your business, and provide any additional information that may help us assess its impact on the UK's overall economic interest

Upstream businesses overwhelmingly stated (14 out of 18, 78%) that a tariff would increase their sales, support UK manufacturing, protect jobs, and counter the impact of low-priced Chinese imports. One business (1 out of 18, 6%) described current harm from cheap imports, and another (1 out of 18, 6%) said the tariff would not affect them or had nothing further to add (Table 8).

Table 8: Feedback of upstream businesses on potential tariffs on boom lifts from China

Themes	Frequency (out of 18)	Examples of what businesses said
Positive impact / support for tariff	14	Increased sales, stabilised production, confidence to invest, protect UK manufacturing, level the playing field
Protect UK jobs / skills	2	Prevent redundancies, maintain skilled engineering jobs
Harm from cheap Chinese imports	1	Low-cost imports damaging UK OEMs, reduced production
No impact / no additional information	1	'No', 'not sure it could affect us'

Q13: Question for downstream businesses - Please tell us how boom lifts from China compare to those from other countries (including the UK) in terms of price, quality, or characteristics, and how a potential tariff on Chinese boom lifts might affect your business and the overall economic interest of the UK.

Table 9: Feedback of downstream businesses on potential tariffs on boom lifts from China

Themes	Frequency (out of 11)*	Examples of what businesses said
Higher costs / reduced profits	5	Tariff increases costs; reduces profits; prevents reinvestment; increases CAPEX; makes trading difficult.
Chinese boom lifts are higher quality	8	Better quality; higher build quality; more reliable; better innovation; higher quality than US/Canadian machines.
Chinese boom lifts are cheaper / more cost-effective	3	More cost-effective; cheaper than UK machines; very low purchase prices.
Market disruption / reduced choice / rental-rate pressure	4	Reduced choice; used-equipment market hit; rental rates pushed down; "race to the bottom".
Financial risk / residual-value concerns	3	Tariff affects value of machines already purchased; companies at risk; finance may be withdrawn.

Support for UK manufacturing / jobs	2	Need to safeguard UK skills and jobs; UK used to be a strong manufacturer.
Avoid purchasing from China	1	"We try not to purchase from Chinese manufacturers."
Safety emphasis	1	"Safety is everything."
Free-market preference	1	"It should be left as a free market."
Negative view of Chinese quality	1	"Quality is not very good compared to others."

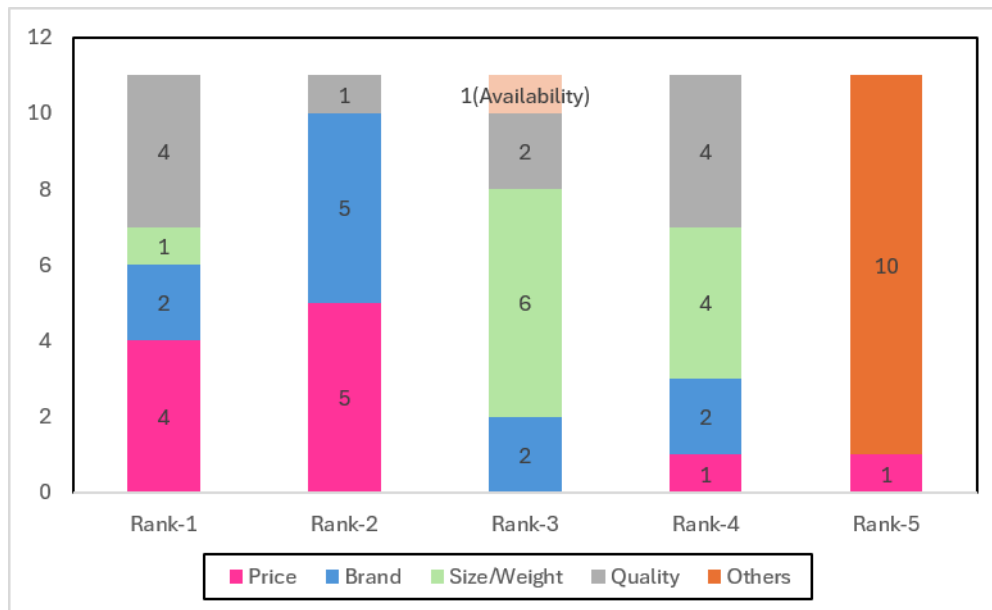
* Note: All 11 downstream rental businesses answered this question. The one downstream end-user did not, so the total number of respondents is 11. Each respondent commented on several issues, for example, costs, quality, choice, risks etc which led to higher overall frequencies across the themes. However, each individual theme still has fewer than 11 responses.

All 11 downstream rental businesses responded to this question. The downstream end-user did not provide a response. The answers from the 11 businesses were grouped into several themes. Around 73% (8 out of 11) said Chinese boom lifts are higher quality, more reliable, better specified, or more innovative than UK, US or European alternatives. Around 27% (3 out of 11) said Chinese boom lifts are cheaper or more cost-effective. Around 45% (5 out of 11) said a tariff would increase costs, reduce profits, limit reinvestment, or require higher capital expenditure. Around 36% (4 out of 11) said a tariff could reduce equipment choice, affect the used-equipment or spare-parts markets, or worsen rental-rate pressure caused by low-priced imports. Around 27% (3 out of 11) said a tariff could create financial risks, including residual-value issues or withdrawal of finance. Around 18% (2 out of 11) emphasised the need to support UK manufacturing, skills, and jobs. Around 9% (1 out of 11) said they avoid buying from China, 9% stressed safety, 9% preferred a free-market approach, and 9% reported lower quality from some Chinese machines.

Q14: Rank the order in which the following factors apply when considering purchasing a boom lift by your company (with 1 being the most important and 5 being the least important).

Downstream businesses were asked to rank the order in which certain factors (price, brand, size/weight, quality, availability) applied when considering purchasing boom lifts (with 1 being the most important and 5 being the least important) (Figure 1). The ranking results were mixed. Price and quality emerged as the strongest factors at Rank-1, while price and brand were most common at Rank-2. Size/weight dominated Rank-3. Overall, the findings show that downstream businesses consider four key factors, namely price, quality, brand and size/weight, rather than price alone when purchasing boom lifts.

Figure 1: Ranking of factors considered by downstream businesses when purchasing boom lifts



Q15: If boom lift prices were to increase, how would this affect rental demand, and what actions would your business take if a £50,000 boom lift increased in price by £2,500 or by £15,000?

Downstream businesses were asked how rental demand would be impacted if prices of boom lifts were to increase. 58% (7 out of 12) of respondents indicated no change (Table 10). When asked how they would respond to a £2,500 price increase (2 out of 12, 17%) mentioned they would not purchase the boom lift or switch to an alternative product while the remaining 10 respondent (83%) said they would either still buy it or switch to a cheaper boom lift. With a £15,000 increase, half of the downstream businesses (6 out of 12, 50%) mentioned they would not purchase the boom lift while the remaining half said they would either still buy it or switch to a cheaper boom lift.

Table 10: Sensitivity of downstream businesses to boom lift price increases

Downstream businesses	If prices of boom lifts were to increase, how would that affect rental demand?	Frequency
	Rental demand for boom lifts would reduce	5
	Rental demand for boom lifts would remain the same	7
Downstream businesses total		12
Downstream businesses	If you were considering buying a boom lift costing £50,000, and the price of this boom lift rose by £2500, what would you do?	Frequency
	Buy a cheaper boom lift	3
	Buy it regardless	7
	Not buy it	1
	Use an alternative product (not a boom lift), please specify	1
Downstream businesses total		12

Downstream businesses	If you were considering buying a boom lift costing £50,000 and the price of boom lift rose by £15,000 what would you do?	Frequency
	Buy a cheaper boom lift	3
	Buy it regardless	3
	Not buy it	6
Downstream businesses total		12
