

Home » Machinery & Equipment
» Global Boom And Scissor Lift Market

Global Boom And Scissor Lift Market (By Product Type: Boom Lifts (Articulated Boom Lifts, Telescopic Boom Lifts, Straight Boom Lifts), Scissor Lifts (Electric Scissor Lifts, Engine-Powered Scissor Lifts, Rough Terrain Scissor Lifts); By Power Source: Electric, Engine-Powered, Hybrid; By End-Use Industry) – Global Market Size, Share, Growth, Trends, Statistics Analysis Report, By Region, and Forecast 2025–2033



Description	Segmentation
Table Of Content	Methodology
Request Free Sample	

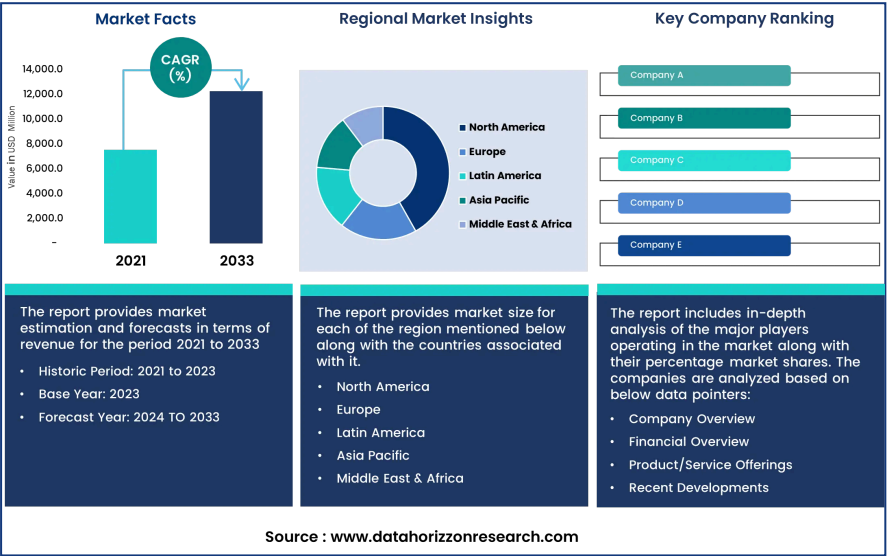
Market Overview
Market Overview

The global boom and scissor lift market was valued at USD 13.7 billion in 2024 and is projected to reach USD 22.4 billion by 2033, registering a CAGR of 5.6% during the forecast period 2025–2033. Boom and scissor lifts, collectively known as aerial work platforms (AWPs) or mobile elevating work platforms (MEWPs), serve as essential equipment for providing temporary access to elevated work areas across construction, maintenance, manufacturing, and various other industrial applications. These versatile machines enable workers to safely perform tasks at height while maintaining productivity and efficiency compared to traditional access methods such as scaffolding or ladders.

The market encompasses various lift configurations, including articulated and telescopic boom lifts that provide extended horizontal and vertical reach with greater flexibility, and scissor lifts that offer stable elevated platforms with higher load capacities but more limited reach capabilities.

The COVID-19 pandemic temporarily disrupted the market in 2020 through construction project delays and reduced industrial activity, but recovery has been robust as infrastructure development and maintenance activities resumed. Technological advancements have significantly transformed the industry landscape, with manufacturers integrating telematics, improved safety features, electric and hybrid power systems, and automated functions that enhance performance while reducing operational costs and environmental impact. Safety regulations have increasingly influenced market dynamics, with stringent worker protection standards driving adoption of modern aerial platforms with advanced safety features in place of traditional access methods. The rental business model dominates the market, with approximately 70% of boom and scissor lifts globally owned by equipment rental companies rather than end-users, creating a unique market structure where rental fleet replacement cycles significantly impact manufacturing demand. Market growth has been particularly strong in developing regions experiencing rapid urbanization and infrastructure expansion, though mature markets continue generating substantial replacement demand as aging equipment reaches end-of-life. The competitive landscape encompasses both global full-line manufacturers offering comprehensive aerial lift portfolios and specialized producers focusing on particular lift categories or applications. Environmental considerations have accelerated the transition toward electric and hybrid models, particularly in indoor applications and environmentally sensitive outdoor settings, though

conventional diesel-powered units maintain advantages in demanding outdoor environments requiring extended operation without recharging access. The market continues evolving with increasing focus on total cost of ownership, including not only acquisition costs but also operational efficiency, maintenance requirements, residual value, and productivity enhancements that deliver superior return on investment for equipment owners.



Key Market Highlights

- Boom lifts represented the largest product segment in 2024, accounting for approximately 56% of total market value due to their versatility, extended reach capabilities, and suitability for diverse applications.
- Electric-powered machines demonstrated the fastest growth rate at approximately 7.8% annually, driven by increasing environmental regulations, indoor application requirements, and improving battery technology.
- The construction industry remained the dominant end-use segment in 2024, capturing approximately 45% of market share, supported by global infrastructure development and commercial building activities.
- North America maintained its position as the largest regional market in 2024, accounting for approximately 35% of global market value due to strong rental fleet infrastructure and stringent workplace safety regulations.

- Telematics and fleet management technologies have gained significant traction, with approximately 60% of new machines sold in developed markets now equipped with remote monitoring capabilities.
- Compact and lightweight models designed for space-constrained job sites and floors with limited load-bearing capacity have emerged as a growing market segment with approximately 12% annual growth.
- The equipment rental business model continues dominating the market, with rental companies accounting for approximately 70% of global aerial lift purchases and significantly influencing product development priorities.

Global Boom And Scissor Lift Market Regional Market Size 2024 and 2033

Region	Market Size 2024 (USD Billion)	Market Size 2033 (USD Billion)
North America	4.80	7.56
Europe	3.97	6.49
Asia Pacific	3.56	6.27
Latin America	0.89	1.34
Middle East & Africa	0.48	0.74

Market Drivers

Expanding construction activities and infrastructure development represent primary drivers for the boom and scissor lift market. According to the U.S. Census Bureau, construction spending in the United States reached approximately \$2.1 trillion in 2023, with non-residential construction growing at 5.3% annually, creating substantial demand for elevated access equipment. The European Commission reports that construction output across EU countries increased by 2.8% in 2023, with public infrastructure projects, renewable energy installations, and commercial building renovations driving particular growth

in aerial platform requirements. Stringent worker safety regulations have significantly accelerated market adoption. The U.S. Occupational Safety and Health Administration (OSHA) reports that falls remain the leading cause of fatalities in construction, accounting for 36.5% of all construction fatalities, compelling employers to implement safer access solutions including modern aerial lifts. The European Agency for Safety and Health at Work estimates that work-related accidents cost EU economies approximately €476 billion annually, with falls from height representing a significant preventable portion, creating strong regulatory pressure for safer elevated work solutions. Labor shortages and productivity concerns have further boosted demand for efficient access equipment. The U.S. Bureau of Labor Statistics reports that the construction industry faces a shortage of approximately 546,000 workers in 2023, increasing pressure to maximize productivity of available workforce through efficient equipment utilization. Additionally, the aging infrastructure in developed regions requires substantial maintenance activities. The American Society of Civil Engineers' Infrastructure Report Card assigns a C- grade to American infrastructure, indicating significant maintenance backlog across bridges, buildings, and utilities, with approximately \$2.6 trillion in infrastructure needs, much of which requires elevated access equipment for inspection, maintenance, and renovation work. The growing trend toward green building designs with complex architectural features and sophisticated building systems has further expanded application requirements. The U.S. Green Building Council reports that LEED-certified buildings grew by 14% in 2023, with these structures often featuring advanced MEP systems, unique facades, and sustainable energy components requiring specialized maintenance access solutions.

Market Restraints

Despite promising growth prospects, the boom and scissor lift market faces several challenges that could impede its expansion. High acquisition and maintenance costs create adoption barriers, particularly in developing regions and among smaller contractors. According to the U.S. Small Business Administration, equipment acquisition represents a significant capital burden for small construction companies, with aerial platforms typically requiring investments of \$15,000 to \$150,000 per unit depending on size and capabilities. The U.S. Bureau of Economic Analysis reports that construction equipment prices increased by approximately 5.8% annually between 2021 and 2023, outpacing general inflation and creating additional cost pressure for equipment buyers and rental companies. Economic cyclicalities and construction market volatility introduce significant demand fluctuations. The U.S. Federal Reserve's economic indicators show that construction activity typically experiences contraction of 15-25% during economic downturns, directly impacting equipment purchase and rental activity. The European Construction Industry Federation notes that construction activity fluctuations averaged $\pm 8.4\%$ annually over the past decade, creating challenging demand planning for equipment manufacturers and rental fleets. Transportation logistics and mobilization costs constrain utilization efficiency. The U.S. Department of Transportation's freight analysis indicates that construction equipment transportation costs increased by approximately 12% between 2021 and 2023 due to fuel price fluctuations and trucking capacity constraints. Operational skill requirements and safety training needs represent additional implementation challenges. The U.S. Occupational Safety and Health Administration mandates comprehensive operator training for aerial work platforms, with the National Commission for the Certification of Crane Operators reporting that proper training requires approximately 6-8 hours per operator plus periodic recertification, creating logistical and cost burdens for

equipment users. Additionally, site conditions and space constraints limit application feasibility in certain environments. The U.S. Department of Energy's Building Technologies Office reports that approximately 30% of building maintenance activities occur in spaces with limited floor loading capacity or restricted access, creating challenges for deploying conventional aerial platforms without specialized compact or lightweight equipment designs.

Market Opportunity

Technological innovations present significant opportunities for market expansion, particularly through the development of advanced power systems, automation features, and enhanced safety technologies. The U.S. Department of Energy reports that battery technology advancements have improved energy density by approximately 7% annually since 2018, enabling electric aerial platforms with extended operational cycles and reduced charging requirements. The U.S. Department of Labor's Occupational Safety and Health Administration (OSHA) has documented a 25% reduction in workplace accidents when advanced safety technologies such as proximity detection and overload prevention are implemented on elevated work platforms. Increasing infrastructure investment across global markets creates substantial growth potential. The U.S. Infrastructure Investment and Jobs Act allocates approximately \$1.2 trillion for infrastructure development through 2026, including substantial investments in transportation, utilities, and public facilities that require extensive elevated access equipment during construction and subsequent maintenance. The European Commission's NextGenerationEU initiative provides €723.8 billion in funding for infrastructure modernization and green energy transition projects across member states, creating sustained demand for aerial work platforms. Urbanization trends in developing regions represent another significant

opportunity. The United Nations Department of Economic and Social Affairs projects that 68% of the world population will live in urban areas by 2050, up from 55% currently, driving substantial construction activity in emerging markets. The expansion of renewable energy installations offers promising specialized applications. The U.S. Energy Information Administration forecasts that renewable energy capacity in the United States will increase by approximately 85% between 2023 and 2030, with solar and wind installations requiring specialized aerial access equipment for construction and maintenance. Additionally, the growing adoption of Building Information Modeling (BIM) and digital construction technologies creates opportunities for integrated smart equipment solutions. The U.S. National Institute of Standards and Technology estimates that BIM implementation can improve construction productivity by 5-10% while reducing project costs by 3-5%, with these digital approaches increasingly incorporating equipment utilization planning and specialized access requirements during both design and construction phases.

Market Segment Analysis

By Product Type

Boom lifts represented the largest product segment in 2024, accounting for approximately 56% of total market value. These versatile aerial platforms feature extending arms (booms) that provide significant horizontal outreach capabilities in addition to vertical elevation, enabling access to work areas that would be otherwise unreachable with vertical-only lifts. The segment encompasses several boom configurations, including articulating booms with multiple hinged sections allowing navigation around obstacles, telescopic booms providing maximum horizontal reach, and straight booms offering economical solutions for less complex access requirements. Boom lifts typically provide working heights ranging from 30 to 185 feet, with horizontal reach capabilities extending to over 90

feet in larger models. Their prominence in the market reflects their exceptional versatility across diverse applications including construction, maintenance, inspection, and industrial operations where accessing difficult locations is essential. According to the U.S. Occupational Safety and Health Administration's workplace equipment utilization data, boom lifts demonstrate particular advantages for tasks requiring access over obstacles, reaching across open spaces, or positioning workers at precise locations around complex structures. The U.S. Bureau of Labor Statistics reports that specialized construction trades including electrical, HVAC, and exterior finishing work—activities particularly suited to boom lift capabilities—grew by approximately 3.8% annually between 2020 and 2023, outpacing general construction growth and driving corresponding demand for these access platforms. Technological advancements have significantly enhanced boom lift capabilities, with manufacturers implementing advanced control systems, improved stability management, and sophisticated safety features including envelope control that prevents operation in unstable configurations. The segment has experienced notable innovation in power systems, with hybrid and electric options gaining significant market share, though diesel-powered units remain dominant for outdoor applications requiring extended operation without charging access.

By End-Use Industry

The construction industry remained the dominant end-use segment in 2024, capturing approximately 45% of market share. This segment encompasses diverse construction applications including commercial buildings, industrial facilities, infrastructure projects, residential developments, and institutional structures. Aerial platforms serve critical functions throughout the construction process, from initial structural work through mechanical and electrical system installation to finishing activities and subsequent

maintenance operations. The segment's prominence reflects the fundamental importance of safe, efficient elevated access across virtually all construction project types and phases. According to the U.S. Census Bureau, total construction spending reached approximately \$2.1 trillion in 2023, with non-residential construction growing particularly strongly at 5.3% annually, creating substantial demand for elevated access equipment across project types. The U.S. Bureau of Labor Statistics reports that approximately 32% of construction activities involve work at heights, with modern safety regulations increasingly mandating mechanized access solutions rather than traditional ladders or improvised platforms. The construction segment utilizes the full spectrum of aerial platforms, with boom lifts typically preferred for exterior work requiring extended reach and scissor lifts commonly deployed for interior applications where higher load capacities and larger platforms benefit multiple workers and materials. The segment has driven significant innovation in equipment design, particularly regarding terrain capability for unimproved construction sites, compact dimensions for operation in confined spaces, and specialized attachments that enhance productivity for specific construction tasks. According to the Associated General Contractors of America, approximately 72% of construction firms reported difficulty filling positions in 2023, creating additional incentives to maximize worker productivity through efficient equipment utilization, including modern aerial platforms that reduce setup time compared to traditional scaffolding while improving safety outcomes.

Market Scope

Report Coverage	Details
Market Size in 2024	USD 13.7 Billion
Market Size in 2033	USD 22.4 Billion

Report Coverage	Details
Market Growth Rate from 2025 to 2033	5.6% CAGR
Largest Market	North America
Segments Covered	Product Type, Power Source, End-Use Industry
Regions Covered	North America, Europe, Asia Pacific, Latin America, Middle East & Africa

Regional Analysis

North America dominated the global boom and scissor lift market in 2024, accounting for approximately 35% of total market value. This regional leadership is primarily attributed to well-established safety regulations, a mature construction industry, extensive manufacturing facilities, and the world's most developed equipment rental infrastructure. According to the U.S. Census Bureau, construction spending in the United States reached approximately \$2.1 trillion in 2023, with non-residential construction growing at 5.3% annually, creating substantial demand for elevated access equipment. The American Rental Association reports that the North American equipment rental industry generated approximately \$70.4 billion in revenue in 2023, with aerial work platforms representing one of the highest-utilization categories in construction equipment fleets. The region's stringent workplace safety regulations significantly drive market adoption, with the U.S. Occupational Safety and Health Administration (OSHA) maintaining comprehensive standards regarding fall protection and safe access to elevated work locations. OSHA statistics indicate that falls remain the leading cause of construction fatalities, accounting for 36.5% of construction deaths in 2023, compelling employers to implement safer access solutions including modern aerial lifts. The U.S. Bureau of Labor Statistics reports that specialized construction trades including electrical, HVAC, and exterior finishing work—activities particularly suited to aerial platform capabilities—

employed approximately 4.6 million workers in 2023, creating substantial application opportunities. Canada's infrastructure investment programs have further supported regional demand, with Statistics Canada reporting that public sector capital expenditures reached CAD 86.8 billion in 2023, with significant allocations for transportation infrastructure, utilities, and public facilities requiring elevated access equipment during both construction and maintenance phases. The region also benefits from significant manufacturing presence, with the U.S. Department of Commerce reporting that approximately 40% of global aerial lift production capacity is located in North America, providing logistical advantages for equipment deployment while supporting a robust aftermarket parts and service ecosystem.

Competitive Landscape

The global boom and scissor lift market exhibits moderate concentration, with approximately 60% of global market share controlled by five major manufacturers who maintain comprehensive product portfolios spanning multiple lift categories, sizes, and power options. These leading companies leverage economies of scale, extensive distribution and service networks, established brand recognition, and substantial research and development capabilities to maintain competitive advantages across global markets. Mid-sized manufacturers typically focus on specialized market segments, particular geographical regions, or innovative niche applications where specialized expertise creates defensible market positions despite lacking the scale advantages of larger competitors. The competitive landscape is characterized by significant barriers to entry in the premium segment, including substantial capital requirements for manufacturing facilities, technical expertise in hydraulic systems and structural engineering, established safety certification credentials, and the challenge of developing global distribution and service capabilities. Product differentiation

strategies focus on total cost of ownership rather than initial acquisition price alone, with manufacturers highlighting productivity enhancements, reduced maintenance requirements, improved fuel efficiency, extended service intervals, and enhanced residual values that deliver superior long-term economics despite potentially higher upfront costs. The market has experienced considerable consolidation through strategic acquisitions, as larger equipment manufacturers seek to expand their aerial platform portfolios, access new geographic markets, or acquire specialized technological capabilities. Service support capabilities represent a critical competitive factor, with manufacturers developing sophisticated parts distribution systems, technical training programs, and rapid-response field service capabilities to minimize equipment downtime—a critical consideration for rental companies where equipment utilization directly impacts profitability. The competitive environment continues to evolve with increasing emphasis on technological differentiation, particularly regarding telematics capabilities, advanced control systems, automated functions, and alternative power systems that address evolving customer requirements while creating premium positioning opportunities. Regional competitive dynamics vary significantly, with local manufacturers maintaining stronger positions in developing markets through lower cost structures and designs adapted to local operating conditions, while global premium brands typically dominate developed markets where safety standards, performance requirements, and sophisticated rental fleet management create advantages for advanced equipment designs.

Key Companies

- JLG Industries, Inc. (Oshkosh Corporation)
- Terex Corporation (Genie)
- Skyjack (Linamar Corporation)
- Haulotte Group

- Aichi Corporation (Toyota Industries Corporation)
- Manitou Group
- Snorkel (Xtreme Manufacturing)
- MEC Aerial Work Platforms
- Zoomlion Heavy Industry Science & Technology Co., Ltd.
- Dingli Machinery Co., Ltd.
- XCMG Group
- Sinoboom
- Tadano Ltd.
- Niftylift
- CTE Group

Recent Developments

- In March 2024, JLG Industries introduced a new electric articulating boom lift featuring a redesigned power system that extends operating time by approximately 35% compared to previous models while reducing charging requirements and total energy consumption.
- Genie (Terex Corporation) launched an integrated telematics platform in January 2024 that provides real-time performance monitoring, predictive maintenance alerts, and utilization tracking across mixed equipment fleets, enhancing rental fleet management capabilities.
- Haulotte Group unveiled a new range of compact electric scissor lifts in November 2023 specifically designed for space-constrained environments, featuring zero tail swing, compact dimensions, and improved maneuverability while maintaining full work capabilities.
- Skyjack (Linamar Corporation) expanded its rough terrain scissor lift lineup in September 2023 with models featuring enhanced payload capacities, improved terrain capabilities, and next-generation control systems that simplify operation while implementing additional safety features.
- Zoomlion Heavy Industry Science & Technology Co., Ltd. established a new manufacturing facility in July 2023 dedicated to electric aerial work platforms, increasing

production capacity by approximately 12,000 units annually to meet growing global demand for emissions-free equipment.

- Dingli Machinery Co., Ltd. introduced a hybrid boom lift series in May 2023 combining diesel engines with battery-electric systems that reduce fuel consumption by approximately 40% while extending operating range compared to pure electric models.
- Manitou Group secured a strategic partnership with a leading construction equipment rental company in March 2023, becoming the preferred supplier for aerial work platforms across multiple European markets with an initial order for 1,500 units.

Future Outlook

The global boom and scissor lift market is poised for steady growth over the forecast period, driven by infrastructure development, stringent safety regulations, and technological advancements enhancing equipment capabilities while addressing environmental considerations. Expanding infrastructure investment will remain a primary growth driver, with substantial government funding allocated for transportation networks, utilities, and public facilities across global markets. The U.S. Infrastructure Investment and Jobs Act provides approximately \$1.2 trillion for infrastructure modernization through 2026, creating sustained demand for construction equipment including aerial work platforms. The European Commission's NextGenerationEU initiative allocates €723.8 billion for infrastructure development and green energy transition projects across member states, supporting similar equipment requirements. The evolution of workplace safety regulations will continue accelerating market adoption of modern access equipment. The U.S. Occupational Safety and Health Administration reports that companies implementing comprehensive fall protection programs, including appropriate access equipment, experience 60-70% fewer fall-related incidents and

associated costs. The International Labour Organization estimates that work-related accidents cost approximately 3.9% of global GDP annually, creating strong economic incentives for improved workplace safety practices including modern access equipment. Technological innovation will significantly transform equipment capabilities and applications. The U.S. Department of Energy projects that battery technology improvements will enable electric aerial platforms to achieve operational parity with conventional diesel units by approximately 2028 in most applications, accelerating the transition toward emissions-free equipment. The U.S. Department of Transportation's research programs indicate that autonomous and semi-autonomous functions could improve aerial platform operational efficiency by 15-25% while enhancing safety outcomes through preventing operator errors. Urbanization trends in developing regions represent substantial growth opportunities. The United Nations Department of Economic and Social Affairs projects that urban populations in developing regions will increase by approximately 2.5 billion people by 2050, driving corresponding construction activity requiring access equipment. The rental business model will continue dominating equipment deployment, with the American Rental Association forecasting that equipment rental penetration will increase from approximately 55% to 65% of total construction equipment utilization by 2030 as contractors increasingly prefer the flexibility and reduced capital requirements of rental versus ownership. Additionally, the growing focus on building energy efficiency and sustainability will create expanding maintenance requirements for increasingly complex building systems. The U.S. Department of Energy's Building Technologies Office reports that high-performance buildings typically require 30-40% more frequent access to mechanical systems, building envelopes, and energy management components compared to conventional

structures, creating additional aerial platform utilization opportunities throughout building lifecycles.

Market Segmentation

- By Product Type
 - Boom Lifts
 - Articulated Boom Lifts
 - Telescopic Boom Lifts
 - Straight Boom Lifts
 - Atrium/Spider Lifts
 - Scissor Lifts
 - Electric Scissor Lifts
 - Engine-Powered Scissor Lifts
 - Rough Terrain Scissor Lifts
- By Power Source
 - Electric
 - Engine-Powered
 - Diesel
 - Gasoline/Petrol
 - LPG/Propane
 - Hybrid
- By End-Use Industry
 - Construction
 - Manufacturing
 - Warehouse & Logistics
 - Maintenance & Facility Management
 - Entertainment & Events
 - Aerospace
 - Energy & Utilities
 - Others
- By Lift Height
 - Below 10 Meters
 - 10-20 Meters
 - 20-30 Meters
 - Above 30 Meters
- By Region
 - North America
 - Europe

- Asia Pacific
- Latin America
- Middle East & Africa

**REPORT ID:**

DHR 49068

PUBLISHED DATE:

19/02/2025

NO. OF PAGES:

155

FORMAT:[Buy Now](#)[Download Free Sample](#)[Download PDF Sample](#)[Download Free Sample](#)[Need Customization](#)[Speak to Analyst](#)[Ask for Discount](#)[Get In Touch With Us](#)[☎ +1-970-672-0390](#)[✉ Contact By Mail](#)



[Who we are](#) [Subscription](#) [Reports](#)

[Subscribe](#)

Trust Online



Useful Links

[Licensing and Pricing](#)

[Terms and Conditions](#)

[Privacy Policy](#)

[FAQ's](#)

Contact Us

✉ sales@datahorizzonresearch.com

☎ +1-970-672-0390

Connect with us



Headquarters:

North Mason Street, Fort Collins,
Colorado, United States.

Operations:

Office-402, Garnets Bay,
Next to Four Points by Sheraton,
Viman Nagar, Pune-411014.

© 2025 **DataHorizzon** | All Rights Reserved