

# Sign of the times

It has been quite a year, thus far, but the 2020 access50 listing of the world's largest access equipment rental companies, ranked by fleet size, reflects a pre-Covid-19 market, overall.

The top 10 of the annual Access50 listing has been pretty stable in recent memory, apart from the appearance of Loxam in third place, after it acquired Lavendon Group in 2017. This year, Loxam remains in third, despite a 35% increase in its fleet following another acquisition - Ramirent - in 2019.

However, there have been some notable

changes among the top 10 places. The top five remains the same as last year, with United Rentals unsurprisingly taking top position again. The gap between United and customarily-second placed Sunbelt Rentals has historically been vast, with a difference last year of 40,000 units. Until now, Sunbelt and its UK-based sister company A-Plant,



## TOP 50 FLEET SIZES

	2020	% change	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
<b>TOP 5</b>	<b>417614</b>	<b>10.7</b>	377292	339351	291170	222165	214325	220192	204624	196656	165556	164237	173792
<b>TOP 10</b>	<b>572984</b>	<b>13.6</b>	504337	455788	523157	428443	298383	295334	271576	265888	240113	238181	254424
<b>TOP 50</b>	<b>850914</b>	<b>6.4</b>	799179	691465	645461	577377	527514	523767	481490	460758	434358	424853	449250

## access50 RENTAL FLEETS

'20	'19	COMPANY	MEWP FLEET			TELEHANDLER FLEET			FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
			2020	2019	CHANGE	2020	2019	CHANGE				
1	1	<b>United Rentals</b>	<b>142256</b>	145686	-2.4%	<b>31645</b>	31461	0.6%	S,B,T	1165	USA, Canada, France, Germany, UK, The Netherlands	USA
2	2	<b>Sunbelt Rentals</b> (Including A-Plant)	<b>126150</b>	104200	21.1%	<b>24050</b>	20000	20.3%	S,B	740	USA, Canada, UK	USA
3	3	<b>Loxam</b> (Including Ramirent & Stavdal)	<b>71800</b>	53150	35.1%	<b>7700</b>	7100	8.5%	S,B,T, M,H	1100	Europe, Middle East, South America	France
4	4	<b>Mateco</b> (TVH Group)	<b>39647</b>	38145	3.9%	<b>1621</b>	1479	9.6%	S,B,T	185	Europe, Malaysia, Mexico	Belgium
5	5	<b>Aktio Holdings Corp.</b>	<b>37761</b>	36111	4.6%	<b>0</b>	0	0%	S,B,T	1037	Japan, Taiwan, Bangladesh, Southeast Asia	Japan
6	19	<b>Shanghai Horizon Equipment &amp; Engineering Co.</b>	<b>34964</b>	11191	212.4%	<b>0</b>	0	0%	S,B	105	China	China
7	15	<b>Boels</b> (Including Cramo)	<b>33201</b>	14629	127.0%	<b>1333</b>	712	87.2%	S,B,T,M	758	Europe	Netherlands
8	7	<b>Ahern Rentals</b>	<b>31256</b>	27365	14.2%	<b>4978</b>	4974	0.1%	S,B	94	USA	USA
9	8	<b>Nikken</b>	<b>28707</b>	26948	6.5%	<b>0</b>	2		S, B, T	244	Japan, USA, Southeast Asia, UAE, Germany	Japan
10	6	<b>HERC</b> (EST)	<b>27242</b>	27797	-2%	<b>5645</b>	5760	-2%	S, B	280	US, Canada, China, Saudi Arabia, UK	USA
11	9	<b>Nishio Rent All</b>	<b>24634</b>	23432	5.1%	<b>4382</b>	3196	37.1%	S,B,T,M	434	Japan, Singapore, Southeast Asia, Australia	Japan
12	10	<b>H&amp;E Equipment Services</b> (EST)	<b>21100</b>	21503	-1.9%	<b>2842</b>	2899	-2%	S,B,T, H,M	65	USA	USA
13	11	<b>Sunstate Equipment</b>	<b>20400</b>	20800	-1.9%	<b>4450</b>	4400	1.1%	S,B	77	USA	USA
14	12	<b>Riwal</b>	<b>19000</b>	18750	1.3%	<b>1000</b>	1080	-7.4%	S,B,T	72	Europe, Middle East, India, Kazakhstan	Netherlands
15	14	<b>AVS System Lift</b>	<b>18334</b>	16804	9.1%	<b>1720</b>	1563	10.0%	S,B,T, M,H	96	Germany, Poland, Netherlands, Austria, Italy, Switzerland, Romania, Turkey	Germany

both owned by Ashtead Group, have been listed separately as they were quite different operations.

This year, it was announced that the UK arm would be rebranded as Sunbelt in line with its US counterpart, and to avoid confusion the fleets of both companies have now been combined in the Access50. It brings the group's 126,000 units much closer to United's fleet size and explains why Sunbelt has such major growth, while United has seen a 2% decline in its fleet.

As we know, the world's biggest access market, North America, was already experiencing a decline in the months leading up to the coronavirus pandemic. The drop in United's fleet figure bears this out, with a similar story being told among other North America-based rental companies, even taking

## TOP 10 TELEHANDLER FLEETS

	COMPANY	TELEHANDLER FLEET 2020	TELEHANDLER FLEET 2019	CHANGE %
1	<b>United Rentals</b>	<b>31645</b>	<b>31461</b>	0.6%
2	<b>Sunbelt</b> (Including A-Plant)	<b>24050</b>	<b>20000</b>	20.3%
3	<b>Loxam</b> (Including Ramirent & Stavdal)	<b>7700</b>	<b>7100</b>	8.5%
4	<b>HERC</b> <sup>(EST)</sup>	<b>5645</b>	<b>5760</b>	-2%
5	<b>Ahern Rentals</b>	<b>4978</b>	<b>4974</b>	0.1%
6	<b>Sunstate Equipment</b>	<b>4450</b>	<b>4400</b>	1.1%
7	<b>Nishio Rent All</b>	<b>4382</b>	<b>3196</b>	37.1%
8	<b>Kiloutou</b>	<b>3800</b>	<b>4250</b>	-10.6%
9	<b>H&amp;E Equipment Services</b> <sup>(EST)</sup>	<b>2842</b>	<b>2899</b>	-2%
10	<b>AVS System Lift</b>	<b>1720</b>	<b>1563</b>	10.0%

into consideration that a couple of those are estimates.

Across the board, the European rental companies' fleets are also generally subdued,

compared to last year, with a number seeing declines year-on-year. Europe was subject to a similar drop in market expectations before Covid-19 made itself known.

'20	'19	COMPANY	AWP FLEET			TELEHANDLER FLEET			FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
			2020	2019	CHANGE	2020	2019	CHANGE				
16	13	<b>Kiloutou</b>	<b>16000</b>	17375	-7.9%	<b>3800</b>	4250	-10.6%	S,B,T,M,H	527	France, Germany, Poland, Italy, Spain	France
17	16	<b>AJ Networks</b>	<b>13300</b>	14000	-5%	<b>400</b>	250	60%	S,B,T	17	South Korea, Vietnam, USA	South Korea
18	21	<b>PartnerLift</b>	<b>11138</b>	10519	5.9%	<b>976</b>	957	2%	S,B,T	135	Germany, Austria, Switzerland, The Netherlands, Eastern Europe	Germany
19	21	<b>Kanamoto</b>	<b>10762</b>	10477	2.7%	<b>31</b>	30	3.3%	S,B,T,M	180	Japan	Japan
20	22	<b>Korea Rental</b>	<b>9600</b>	9569	0.3%	<b>25</b>	0	-	S,B,T	11	Korea, Vietnam, China, India, Qatar, Kuwait, Saudi Arabia	Korea
21	23	<b>Mills Estruturas e Serviços de Engenharia</b> (inc. Solaris)	<b>8706</b>	9000	-3.3%	<b>373</b>	78	378.2%	S,B	32	Brazil	Brazil
22	28	<b>XCMG Guanglian Rental</b>	<b>8542</b>	6663	28.2%	<b>0</b>	6	-	S,B,T,H	15	China	China
23	24	<b>Coates Hire</b>	<b>8400</b>	8000	5.0%	<b>1000</b>	610	63.9%	S,B	168	Australia, Indonesia	Australia
24	25	<b>Pekkaniska</b>	<b>7950</b>	7350	8.2%	<b>0</b>	0	0%	S,B	29	Finland, Russia, Ukraine	Finland
25	26	<b>AFI Rentals Group</b>	<b>7393</b>	7138	3.6%	<b>78</b>	71	9.9%	S,B,T	30	UK, UAE, KSA, Qatar, Bahrain	UK
26	27	<b>Speedy Hire</b> <sup>(EST)</sup>	<b>7320</b>	7100	3.1%	<b>-</b>	<b>-</b>	<b>-</b>	S,B,T	200	UK	UK
27	30	<b>Collé Rental &amp; Sales</b>	<b>6978</b>	6076	14.8%	<b>920</b>	923	-0.3%	S,B,T,H	15	Benelux, Germany	Netherlands
28	29	<b>HSS Hire Group</b> <sup>(EST)</sup>	<b>6820</b>	6615	3.1%	<b>50</b>	50	0.0%	S,B	292	UK, Ireland	UK
29	31	<b>Salti</b>	<b>5257</b>	5104	3.0%	<b>1507</b>	1359	10.9%	S,B,T,M	42	France	France
30	NEW	<b>Rentagroup</b>	<b>5023</b>	NA	NA	<b>199</b>	NA	NA	S,B,T,M,H	77	Finland, Sweden, Norway, Poland	Finland
31	32	<b>Modern (International) Access &amp; Scaffolding</b>	<b>4800</b>	4800	0.0%	<b>2</b>	2	0%	S,B	3	Hong Kong, Macau, Singapore	Hong Kong
32	34	<b>MEP Hire</b> <sup>(EST)</sup>	<b>4635</b>	4500	0.3%	<b>0</b>	0	0%	P	9	UK	UK
33	33	<b>GAM</b> <sup>(EST)</sup>	<b>4610</b>	4500	2.4%	<b>0</b>	0	0%	S,B,T,M,H	100	Europe, North Africa Middle East, South America	Spain
34	37	<b>Tonguan Machinery Rental</b>	<b>4200</b>	3995	5.1%	<b>0</b>	0	0%	S,B	25	China	China
35	35	<b>Acces Industrie</b>	<b>3952</b>	4400	-10.2%	<b>111</b>	110	0.9%	S,B,T,M	37	France	France
36	38	<b>Aver Asia</b>	<b>3900</b>	3805	2.5%	<b>50</b>	50	0%	S,B	17	Singapore, Cambodia, Malaysia, China, Indonesia, Myanmar, Thailand	Singapore
37	50	<b>Dongguan Jiafeng Machinery</b>	<b>3600</b>	2350	53%	<b>0</b>	0	0%	S,B	6	China	China
38	39	<b>Kranpunkten</b>	<b>3500</b>	3536	-1.0%	<b>80</b>	80	0%	S,B,T,M,H	7	Sweden	Sweden

### Major climbs

Returning to the subject of the top 10, there a couple of new arrivals in sixth and seventh positions by companies that have worked their way up the list. One of them, in seventh place, is Boels Rental, following its major acquisition of Cramo. Its fleet has more than doubled in size since last year, taking on Cramo's 13,000-strong fleet, as it appeared in the 2019 listing.

It means that two of the three major fleet changes in the top 10 have been brought about by fleet merger or acquisition. It also substantially explains why there is 13.6% growth in the top 10 fleet sizes table, on the first page of this feature. Shanghai Horizon, China's largest rental company bucks that trend, with its fleet rise of more than 20,000 units since the **access50** last year, to bring it into sixth position, from 20th last year. It's

an astounding achievement, in an equally astounding market, that until Covid-19 struck, was growing at up to 45% year-on-year, and manufacturers, including significant new ones, based in the country, were struggling to keep up with demand. It is worth mentioning that other China-based rental companies in this listing do not have the same level of growth as Horizon, although they are still generally well above the average. >

'20	'19	COMPANY	AWP FLEET			TELEHANDLER FLEET			FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
			2020	2019	CHANGE	2020	2019	CHANGE				
39	40	<b>GV3</b> (GruppoVenpa3)	3158	3159	0%	444	420	5.7%	S,B,T,M	34	Italy, Europe	Italy
40	41	<b>Galmon</b>	3000	3000	0%	0	0	0%	S,B	1	Singapore	Singapore
41	NEW	<b>Onsite Rental Group</b> (EST)	3000	NA	NA	300	NA	NA	S,B	32	Australia	Australia
42	44	<b>Prangl Gesellschaft</b>	2850	2661	7.1%	370	366	1.1%	S,B,T	15	Austria, Europe	Austria
43	42	<b>High Reach</b> (EST)	2800	2713	3.2%	520	488	6.6%	S,B	5	USA	USA
44	NEW	<b>Access Group</b> (EST)	2800	NA	NA	280	NA	NA	S,B	20	Australia, Oman, UAE, KSA, Kuwait	Australia
45	46	<b>Zeppelin Rental</b>	2703	2459	9.9%	535	451	18.6%	S,B,T,H	136	Germany, Austria, Czech Republic, Slovakia, Sweden, Denmark	Germany
46	43	<b>Height for Hire</b>	2700	2693	0.3%	0	0	0%	S,B,T,H	28	UK, Ireland, Slovakia, Hungary	Ireland
47	45	<b>JMS</b> (EST)	2575	2500	3%	200	NA	NA	S,B,M	5	UK	UK
48	47	<b>Brand Energy &amp; Infrastructure Services</b> (EST)	2400	2400	0%	0	0	0%	S,B,M	50	France, Holland, UK	USA
49	48	<b>MRT Makina</b>	2374	2366	0.3%	69	67	3%	S,B	6	Turkey, Kuwait	Turkey
50	49	<b>The ALL Family of Companies</b>	2350	2350	0%	430	415	3.6%	S,B	34	US, Canada	USA
51	56	<b>GT Access</b>	2302	2200	4.6%	0	0	0%	S,B,T	8	UK	UK
52	51	<b>Tayeou Kao Kong Enterprise</b>	2300	2100	9.5%	0	0	0%	S,B	6	Taiwan	Taiwan, China
53	NEW	<b>Kennards Hire</b>	2030	NA	NA	32	NA	NA	S,B	184	Australia, New Zealand	Australia
54	52	<b>Alfasi Hire</b> (EST)	2000	1900	5.3%	75	70	7.1%	S,B	4	Australia	Australia



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LARGEST % GROWTH

	COMPANY	MEWP FLEET 2020	MEWP FLEET 2019	CHANGE %
1	Shanghai Horizon Equipment & Engineering Co.	34964	11191	212.4%
2	Boels (Including Cramo)	33201	14629	127%
3	Dongguan Jiafeng Machinery	3600	2350	53%
4	Sudhir Power	1050	750	40%
5	Loxam (Including Ramirent & Stavdal)	71800	53150	35.1%
6	XCMG Guanglian Rental	8542	6663	28.2%
7	Guangzhou Liluo Mechanical Equipment Leasing	1200	960	25.0%
8	Sunbelt (Including A-Plant)	126150	104200	21.1%
9	Goscor	1208	1,019	18.5%
10	Collé Rental & Sales	6978	6076	14.8%

Certainly, the China-based companies will have a continuing impact on the **access50** in the years to come.

Apart from a few exceptions, the table this year, does reflect a more cautious market, yet

still within the realms of normality - a word that few of us would use to describe recent months. The consolidation trend that has been a constant and evolving story in recent years, is still in evidence, with the Boel's

THE SURVEY

This survey was carried out via an e-mail and e-cast campaign in the two months leading up to the publication of this list. Companies with MEWP fleet sizes above 500 units were asked to provide quantities of each platform type in their fleet, along with the other details shown in this listing. This year, for the fifth time, we have also shown the number of telehandlers in each company's fleet. Where figures have not been available we have made an estimate.

buyout of Cramo and the Loxam acquisition of Ramirent, and we continue to be reminded that the access industry has huge growth potential in many global markets.

How the listing will look next year, we can only guess. Many rental companies put capex on hold, but whether they will decide to defleet or where those units would go to if they did, is another question.

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'20	'19	COMPANY	AWP FLEET			TELEHANDLER FLEET			FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
			2020	2019	CHANGE	2020	2019	CHANGE				
55	53	Location d'outils Simplex	1948	1944	0.2%	138	119	16.0%	S,B	43	Canada	Canada
56	55	Star Platforms	1936	1729	12%	0	0	0%	S,B	5	UK	UK
57	54	Chicardo Investment (EST)	1800	1800	0%	2	2	0%	S,B	2	Hong Kong, Macau	Hong Kong
58	57	Alo Rental	1712	1608	6.5%	90	98	-8.2%	S,B,T	19	Chile, Peru, Panama, Argentina	Chile
59	58	AGF Access (EST)	1620	1568	3.3%	12	12	0%	S,B,M		Canada, USA	Canada
60	NEW	United Forklift & Access Solutions	1616	NA	NA	88	NA	NA	S,B	9	Australia	Australia
61	59	Rom Israel	1390	1400	-0.7%	8	7	14.3%	S,B	2	Israel	Israel
62	60	Estaf Equipamentos (EST)	1350	1350	0%	0	0	0%	S,B	9	Brazil	Brazil
63	62	TH Tong Heng Machinery	1316	1246	5.6%	4	0	-	S,B,T	5	Malaysia	Malaysia
64	64	China Construction Bright Futures Equipment	1215	1096	10.9%	0	0	0%	S,B,T	5	China	China
65	68	Goscor	1208	1019	18.5%	49	54	-9.3%	S,B	8	South Africa	South Africa
66	70	Guangzhou Liluo Mechanical Equipment Leasing	1200	960	25%	0	0	0%	S,B	5	China	China
67	61	Fortrent	1191	1341	-11.2%	102	97	5.2%	S,B,M,H	16	Russia	Russia
69	67	Belaruslift	1145	1038	10.3%	46	36	27.8%		6	Belarus, Russia, Kazakhstan	Belarus
69	63	Fatih Vinç	1112	1175	-5.4%	6	6	0%	S,B,T,M	7	Turkey, Bulgaria, Azerbaijan	Turkey
70	65	Rent Rise	1068	1065	0.3%	3	3	0%	S,B,M,H	5	Turkey, Georgia, Azerbaijan, Pakistan, Iraq, Turkmenistan	Turkey
71	71	Mtandt Rentals	1052	957	9.9%	4	4	0%	S,B,T,M,H	5	India, Srilanka	India
72	75	Sudhir Power	1050	750	40%	10	0	-	S,B	6	India, UAE, Saudi Arabia	India
73	69	LH Construction and Machinery Leasing (EST)	1050	984	6.7%	0	0	0%	S,B	2	Singapore	Singapore
74	72	JP Nelson Access Equipment (EST)	1000	900	11.1%	0	0	0%	S,B	7	Southeast Asia	Singapore
75	66	Instant Access	945	1040	-9.1%	0	0	0%	S,B	10	Australia, New Zealand	Australia

(est) – estimated NA – not applicable

Fleet details key: S – scissors B – Booms T – truck mounts M – mast climbers H – passenger hoists P – pusharound