

# access

## INTERNATIONAL



# 2019

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Find out what's new in the fast-changing global MEWP rental sector. This year's access50 listing of the world's largest access rental companies, ranked by fleet size, is as illuminating as ever.

# Crossing the rental world



It has been another striking year for the access50, thanks to a range of acquisitions and new entries.

Let's get started with the buyouts. Since the 2018 listing, United Rentals confirmed it had bought BlueLine, helping to bring its MEWP fleet size to a blistering 145,686. It was only three years ago, in the 2016 list, that United was still on its way to hitting the 100,000 fleet size target. This year, its closest competitor Sunbelt has risen above that landmark too for the first time, with more than 104,000 units.

It was two years ago that third-placed Loxam entered the top 10 for the first time, thanks to its acquisition of Lavendon Group. It joined Mateco (part of the TVH group) as only the second Europe-based rental company in the top 10, which remains the case today.

Both have been on the acquisition trail in the last 12 months, and it's worth pointing out that Loxam's figure in this list does not include Ramirent, as the deal was not 100%

confirmed when it was compiled, and we are waiting on an exact number for Ramirent's fleet - estimated separately here. It does not make any difference to the placings in the table and, no doubt, Ramirent's fleet will be incorporated next year.

### Topping up

Outside the top 10, access specialist Riwal, in 12th position - up two places on last year - has been growing its presence around Europe, with acquisitions in Germany, Sweden and Denmark, as well as making considerable organic investment in its fleet. Just one place behind in 13th is Kiloutou, following its wave of investments that pushes it three places up the table. It too has bought companies in the last 12 months in Germany, along with buyouts in Spain and Italy, demonstrating that these southern European markets are on their way back, particularly Spain. On that subject, Mateco also made its first move into

## TOP 50 FLEET SIZES

	2019	% change	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Top 5	<b>377292</b>	<b>11.2</b>	339351	291170	222165	214325	220192	204624	196656	165556	164237	173792	189850
Top 10	<b>504337</b>	<b>10.7</b>	455788	523157	428443	298383	295334	271576	265888	240113	238181	254424	270510
Top 50	<b>799179</b>	<b>15.6</b>	691465	645461	577377	527514	523767	481490	460758	434358	424853	449250	446956

2019	COMPANY	MEWP FLEET		%	TELEHANDLER FLEET		%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2019	2018		2019	2018					
1	<b>United Rentals</b> (including BlueLine)	<b>145686</b>	129677	12.3	<b>31461</b>	25695	22.4	S, B, T	1165	USA, Canada, France, Germany, UK, the Netherlands	USA
2	<b>Sunbelt</b>	<b>104200</b>	96500	8	<b>20000</b>	17250	15.9	S,B	550	USA, Canada	USA
3	<b>Loxam</b> (including UK Platforms/ not including Ramirent)	<b>53150</b>	48250	10.2	<b>7100</b>	6500	9.2	S,B,T,M	750	Europe, Middle East, South America	France, UK
4	<b>Mateco</b> (TVH Group)	<b>38145</b>	32560	17.2	<b>1479</b>	989	49.5	S,B,T	167	Europe, Malaysia, Mexico	Belgium
5	<b>Aktio Corp</b>	<b>36111</b>	32500	11.1	NA	NA	NA	S,B,T	1010	Japan, Taiwan, Bangladesh, South East Asia	Japan
6	<b>HERC</b> (est)	<b>27797</b>	25979	7	<b>5760</b>	5358	7.5	S, B	280	US, Canada, China, Saudi Arabia, UK	USA
7	<b>Ahern Rentals</b>	<b>27365</b>	24499	11.7	<b>4974</b>	4587	8.4	S,B	89	USA	USA
8	<b>Nikken</b>	<b>26948</b>	24194	11.4	2	2	0	S, B, T	242	Japan, USA, Southeast Asia, UAE, Germany	Japan
9	<b>Nishio Rent All</b>	<b>23432</b>	21479	9.1	<b>160</b> (est)	140	14	S,B,T,M	416	Japan, Singapore, Southeast Asia, Australia	Japan
10	<b>H&amp;E Equipment Services</b> (est)	<b>21503</b>	20286	6	<b>2899</b>	2735	6	S,B,T,H,M	65	USA	USA
11	<b>Sunstate Equipment Co LLC</b>	<b>20800</b>	20100	3.5	<b>4400</b>	4100	7.3	S,B	72	USA	USA
12	<b>Riwal</b>	<b>18750</b>	15646	19.8	<b>1080</b>	854	26.5	S,B,T,M	75	Europe, Middle East, India, Kazakhstan	Netherlands

## TOP 15 TELEHANDLER FLEETS

COMPANY	FLEET SIZE 2019	FLEET SIZE 2018	CHANGE %
<b>1 United Rentals</b>	<b>31461</b>	<b>25695</b>	22.4
<b>2 Sunbelt</b>	<b>20000</b>	<b>17250</b>	15.9
<b>3 Loxam</b>	<b>7100</b>	<b>6500</b>	9.2
<b>4 HERC (EST)</b>	<b>5760</b>	<b>5358</b>	7.5
<b>5 Ahern Rentals</b>	<b>4974</b>	<b>4587</b>	8.4
<b>6 Sunstate Equipment Co LLC</b>	<b>4400</b>	<b>4100</b>	7.3
<b>7 Kiloutou</b>	<b>4250</b>	<b>3400</b>	25
<b>8 H&amp;E Equipment Services (EST)</b>	<b>2899</b>	<b>2735</b>	6
<b>9 A-Plant</b>	<b>1900</b>	<b>2000</b>	-5
<b>10 SystemLift</b>	<b>1563</b>	<b>1430</b>	9.3
<b>11 Mateco (TVH Group)</b>	<b>1479</b>	<b>989</b>	49.5
<b>12 Salti</b>	<b>1359</b>	<b>1182</b>	15
<b>13 Acces Industrie</b>	<b>1,100</b>	<b>1,100</b>	0
<b>14 Rival</b>	<b>1080</b>	<b>854</b>	26
<b>15 PartnerLift</b>	<b>957</b>	<b>924</b>	3.6

Spain this year by acquiring the country's oldest access platform rental company Afron. This follows Loxam's previous move into the country when it bought Hune in 2017, just after its investment in Nacanco in Italy that year.

### Brazil merger

Further down the table, in 23rd position, is Mills. Brazil's largest rental company announced earlier this year that it was merging with Solaris, based in the same country. Both have been longstanding entries in the **access50** and the takeover of Solaris by Mills underlines the economic issues in the country over recent years and the continued challenges that lie ahead.

2019	COMPANY	MEWP FLEET 2019	MEWP FLEET 2018	%	TELEHANDLER FLEET 2019	TELEHANDLER FLEET 2018	%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
13	<sup>16</sup> <b>Kiloutou</b> (est)	<b>17375</b>	13900	25	<b>4250</b>	3400	25	S,B,T,M	500	France, Germany, Poland, Spain	France
14	<sup>13</sup> <b>SystemLift</b>	<b>16804</b>	15678	7.2	<b>1563</b>	1430	9.3	S,B,T,M,H	86	Germany, Poland, Netherlands, Austria, Switzerland, Turkey	Germany
15	<sup>19</sup> <b>Boels</b>	<b>14629</b>	11293	29.5	<b>712</b>	556	28.1	S,B,T,M	400	Europe	Netherlands
16	<sup>17</sup> <b>AJ Networks</b>	<b>14000</b>	13550	3.3	<b>250</b>	150	66.7	S,B	18	Korea, Vietnam, Saudi Arabia, USA	South Korea
17	<sup>15</sup> <b>Cramo</b>	<b>13569</b>	14278	-5	<b>483</b>	488	-1	S,B,T,M,H	300	Finland, Sweden, Norway, Austria, Germany, East Europe, Russia	Finland
18	<sup>18</sup> <b>Ramirent</b> (est)	<b>11332</b>	11563	-2	<b>505</b>	515	-1.9	S,B,M,T,H	40	Slovakia, Ukraine, Russia	Sweden
19	<sup>25</sup> <b>Shanghai Horizon Equipment &amp; Engineering Co.</b>	<b>11191</b>	7474	49.7	NA	NA	NA	S,B	43	China	China
20	<sup>20</sup> <b>Kanamoto</b> (est)	<b>10762</b>	10477	2.7	<b>31</b>	30	3	S,B,T,M	180	Japan	Japan
21	<sup>21</sup> <b>PartnerLift</b>	<b>10519</b>	10004	5.1	<b>957</b>	924	3.6	S,B,T	142	Germany, Austria, Switzerland, Netherlands, Eastern Europe	Germany
22	<sup>23</sup> <b>Korea Rental</b>	<b>9569</b>	9000	6.3	NA	NA	NA	S,B,T	10	Korea, Vietnam, China, India, Qatar, Kuwait, Saudi Arabia	Korea
23	<sup>28</sup> <b>Mills</b> (including Solaris)	<b>9000</b>	5723	57.3	<b>78</b>	71	9.9	S,B,M	30	Brazil	Brazil
24	<sup>24</sup> <b>Coates Hire</b>	<b>8000</b>	8170	-2.1	<b>610</b>	835	-26.9	S,B	162	Australia, Indonesia	Australia
25	<sup>27</sup> <b>Pekkaniska</b>	<b>7350</b>	6500	13.1				S,B	29	Finland, Russia, Ukraine	Finland
26	<sup>26</sup> <b>AFI-Uplift</b> (including Kimberly Group)	<b>7138</b>	7363	-3.1	<b>71</b>	75	-5.3	S,B,T	30	UK, Middle East	UK
27	<sup>NEW</sup> <b>Speedy Hire</b> (including Lifterz)	<b>7100</b>	5500	29.1	-	-	-	S,B,T	200	UK	UK
28	<sup>NEW</sup> <b>XCMG Guanglian Rental</b>	<b>6663</b>	NA	NA	<b>6</b>	NA	NA	S,B,T,H	20	China	China
29	<sup>22</sup> <b>HSS Hire Group</b> (est)	<b>6615</b>	9300	-28.9	<b>50</b>	50	0	S,B	292	UK, Ireland	UK
30	<sup>29</sup> <b>Collé Rental &amp; Sales</b>	<b>6078</b>	5185	17.2	<b>923</b>	890	3.7	S,B,T,H	14	Europe	Netherlands
31	<sup>31</sup> <b>Salti</b>	<b>5104</b>	4439	15	<b>1359</b>	1182	15	S,B,T,M	34	France	France
32	<sup>30</sup> <b>Modern (International) Access &amp; Scaffolding</b>	<b>4800</b>	4700	2.1	<b>2</b>	3	-33.3	S,B	3	Hong Kong, Macau, Singapore	Hong Kong
33	<sup>29</sup> <b>GAM</b> (est)	<b>4610</b>	4610	0	NA	NA	NA	S,B,T,M,H	100	Europe, North Africa, Middle East, South America	Spain
34	<sup>NEW</sup> <b>MEP Hire</b> (est)	<b>4500</b>	NA	NA	NA	NA	NA	Pusharound		UK	UK
35	<sup>32</sup> <b>Acces Industrie</b>	<b>4400</b>	4400	0	<b>1100</b>	1,100	0	S,B,T,M	30	France, Morocco	France
36	<sup>33</sup> <b>A-Plant</b>	<b>4200</b>	4400	-4.5	<b>1900</b>	2000	-5	S,B	190	UK	UK
37	<sup>NEW</sup> <b>Tonguan Machinery Rental</b>	<b>3995</b>	NA	NA	NA	NA	NA	S,B	15	China	China
38	<sup>36</sup> <b>Aver Asia</b>	<b>3805</b>	3059	24.4	<b>50</b>	50	0	S,B	16	Singapore, Cambodia, Malaysia, Indonesia, Myanmar, Thailand	Singapore
39	<sup>35</sup> <b>Kranpunkten</b>	<b>3536</b>	3167	11.7	<b>80</b>	70	14.3	S,B,T, M,H	7	Sweden	Sweden

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Beyond the usual ups and downs of the **access50**, there is a notable new wave of entries from China. Rental is booming across Asia, particularly in China, where just a few years ago there were no rental companies with more than 1,000 MEWPs in their fleets.

Now there are up to ten of them, and that figure will grow significantly over the next five years. I am slightly vague on the exact number, as the fast-moving market means things change quickly.

In addition, new markets sometimes have different dynamics to those in mature markets. Just for example, where the rental model is developing, we find more distributors

offering rental in addition to their usual services. Indeed, XCMG Guanglian, which appears in the **access50**, is a subsidiary of manufacturer XCMG and focuses on re-rental.

Another example is Zhongneng United Digital Technology, which does not appear in the list. It claims to oversee a fleet of around 20,000 units. Most of the equipment is not owned directly by the company, rather by partners and investors, similar, in some cases, to a franchise arrangement. The company was set up in 2016 and says it is seeking an IPO this year.

Southeast Asia, which has a number

of growing access markets, like Malaysia, Thailand, Vietnam and Indonesia are following similar paths. There are already a few companies that are already based in those countries, or operate there, in this list.

### Growth markets

Another growing market is Turkey. We have the country's largest rental company in this list for the first time, that being MRT Makina, with more than 2,300 units in its fleet. Turkey is an important country for access and includes three rental companies with more than 1,000 units. Most of their fleets are based in their home country but

2019	COMPANY	MEWP FLEET			TELEHANDLER FLEET			FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2019	2018	%	2019	2018	%				
40 <sup>38</sup>	<b>GV3</b>	<b>3159</b>	2907	8.7	<b>420</b>	370	13.5	S,B,T,M	32	Italy, Europe	Italy
41 <sup>37</sup>	<b>Galmon</b>	<b>3000</b>	3000	0	<b>0</b>	0	0	S,B	1	Singapore	Singapore
42 <sup>42</sup>	<b>High Reach</b>	<b>2713</b>	2448	10.8	<b>488</b>	465	4.9	S,B	5	USA	USA
43 <sup>39</sup>	<b>Height for Hire</b> (est)	<b>2700</b>	2693	0.3	NA	NA	NA	S,B,T,H	28	UK, Ireland, Slovakia, Hungary	Ireland
44 <sup>41</sup>	<b>Prangl Gesellschaft</b>	<b>2661</b>	2600	2.3%	<b>366</b>	556	-34.2	S,B,T	16	Austria, Europe	Austria
45 <sup>NEW</sup>	<b>JMS</b> (est)	<b>2500</b>	NA	NA	NA	NA	NA	S,B,M	5	UK	UK
46 <sup>44</sup>	<b>Zeppelin Rental</b>	<b>2459</b>	2292	7.3	<b>451</b>	450	0.2	S,B,T,M,H	135	Germany, Austria, Czech Republic, Slovakia	Germany
47 <sup>43</sup>	<b>Brand Energy &amp; Infrastructure Services</b> (est)	<b>2400</b>	2400	0	NA	NA	NA	S,B,M	50	France, Holland, UK	USA
48 <sup>NEW</sup>	<b>MRT Makina</b>	<b>2366</b>	NA	NA	<b>67</b>	NA	NA	S,B	6	Turkey	Turkey
49 <sup>46</sup>	<b>The ALL Family of Companies</b>	<b>2350</b>	2100	11.9	<b>415</b>	385	7.8	S,B	29	US, Canada	USA
50 <sup>NEW</sup>	<b>Dongguan Jiafeng Machinery</b>	<b>2350</b>	NA	NA	NA	NA	NA	S,B	12	China	China
51 <sup>50</sup>	<b>Tayeou Kao Kong Enterprise</b>	<b>2100</b>	1800	16.7	NA	NA	NA	S,B	6	Taiwan	Taiwan, China
52 <sup>48</sup>	<b>Alfasi Hire</b> (est)	<b>2000</b>	1900	5.3	<b>75</b>	70	7.1	S,B	4	Australia	Australia

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**LARGEST % GROWTH**

COMPANY	PERCENTAGE GROWTH
Mills (including Solaris)	<b>57.3</b>
Sudhir	<b>50</b>
Shanghai Horizon Equipment & Engineering Co.	<b>49.7</b>
Boels	<b>29.5</b>
Speedy Hire (including Lifterz)	<b>29.1</b>
Mtandt Rentals	<b>25.6</b>
Kiloutou	<b>25</b>
Tong Heng Machinery	<b>24.6</b>
Aver Asia	<b>24.4</b>
Riwal	<b>19.8</b>
Mateco (TVH Group)	<b>17.2</b>
Collé Rental & Sales	<b>17.2</b>
Tayeou Kao Kong Enterprise	<b>16.7</b>
Salti	<b>15</b>
GT Access	<b>13.3</b>
Pekkaniska	<b>13.1</b>
United Rentals (including BlueLine)	<b>12.3</b>
The ALL Family of Companies	<b>11.9</b>
Ahern Rentals	<b>11.7</b>

the potential for expansion into surrounding Middle East countries, including Iraq, Iran, Syria, Azerbaijan and Turkmenistan, among others, where they have been known to operate, is great.

Moving back to the subject of the established markets of North America and Europe, there is impressive growth over the last year across the board. There has been talk of rental market growth in both continents slowing somewhat this year and next. Even if this is the case, the curve will come from a very high level. And it's worth remembering that a reasonable, often cyclical, slowdown is preferable to a crash from a grossly high level that is unsustainable.

**New era**

All this would suggest that the global MEWP rental sector is in a very healthy place. For more information on developing markets, see the China feature in this issue of the magazine, and for a view on Spain's move back into growth, there is a country report

towards the back of the issue.

And, as we head into a new era of rental we, here at *Access International*, are always on the look out for new entries to the listing. If you are aware of any rental companies that are not listed, but should be, please get in contact.

Similarly, if your rental company is not represented, let us know. The form is quick and simple to fill out and helps us provide an accurate view of the access industry. **AI**

**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 fourth 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.

2019	COMPANY	MEWP FLEET 2019	2018	%	TELEHANDLER FLEET 2019	2018	%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
53	<sup>47</sup> Location d'outils Simplex	1948	1944	0.2	138	119	16.0	S,B	43	Canada	Canada
54	<sup>49</sup> Chicardo Investment (est)	1800	1800	0.0	2	2	0	S,B	2	Hong Kong, Macau	Hong Kong
55	<sup>NEW</sup> Star Platforms	1729	NA	NA	NA	NA	NA	S,B	5	UK	UK
56	<sup>53</sup> GT Access (est)	1700	1500	13.3	NA	NA	NA	S,B,T	5	UK	UK
57	<sup>58</sup> Alo Rental	1608	1533	4.9	98	96	2.1	S,B,T	18	Chile, Peru, Panama, Argentina	Chile
58	<sup>55</sup> AGF Access (est)	1568	1508	4.0	12	10	20	S,B,M	8	Canada, USA	Canada
59	<sup>59</sup> Rom Israel	1400	1410	-7	7	7	0	S,B	2	Israel	Israel
60	<sup>56</sup> Estaf Equipamentos (est)	1350	1350	0	NA	NA	NA	S,B	9	Brazil	Brazil
61	<sup>57</sup> Fortrent	1341	1405	-4.6	97	90	7.8	S,B,M,H	18	Russia, Ukraine	Russia
62	<sup>63</sup> Tong Heng Machinery	1246	1000	24.6	NA	NA	NA	S,B,T	6	Malaysia	Malaysia
63	<sup>61</sup> Fatih Vinc	1175	1120	4.9	6	6	0	S,B,T,M	7	Turkey, Bulgaria, Azerbaijan	Turkey
64	<sup>NEW</sup> China Construction Bright Futures Equipment	1096	NA	NA	NA	NA	NA	S,B	4	China	China
65	<sup>60</sup> Rent Rise	1065	1155	-7.8	3	3	0	S,B,M,H	5	Turkey, Georgia, Azerbaijan, Pakistan, Turkmenistan, Iraq	Turkey
66	<sup>62</sup> Instant Access	1040	1100	-5.5	NA	NA	NA	S,B	10	Australia, New Zealand	Australia
67	<sup>68</sup> Belaruslift	1038	740	40.3	36	32	12.5	S,B,T,M,H	6	Belarus, Russia, Kasakstan	Belarus
68	<sup>65</sup> Goscor Access Equipment	1019	948	7.5	54	54	0	S,B	8	South Africa, Namibia, Botswana, Mozambique	South Africa
69	<sup>63</sup> LH Construction and Machinery Leasing (est)	984	956	2.9	160	155	3	S,B,T	2	Singapore	Singapore
70	<sup>NEW</sup> Guangzhou Liluo Mechanical Equipment Leasing	960	NA	NA	NA	NA	NA	S,B	5	China	China
71	<sup>66</sup> Mtandt Rentals	957	762	25.6	4	4	0	S,B,T,M,H	5	India, Srilanka	India
72	<sup>NEW</sup> JP Nelson Access Equipment	900	NA	NA	NA	NA	NA	S,B	7	Southeast Asia	Singapore
73	<sup>45</sup> Maquinza	877	2124	-58.7	337	237	42.2	S,B,M	16	Spain, Columbia	Spain
74	<sup>67</sup> Alimak Group	750	740	1.4	NA	NA	NA	M,H	9	Australia, Germany, Benelux and France	Sweden
75	<sup>70</sup> Sudhir	750	500	50	NA	NA	NA	S,B	5	India, UAE, Saudi Arabia	India
76	<sup>69</sup> WS-Skyworker	674	616	9.4	28	25	12.0	S,B,T	7	Switzerland	Switzerland
77	<sup>NEW</sup> Shangdong Jurui Machinery Rentals	618	NA	NA	NA	NA	NA	S,B	4	China	China

(est) – estimated NA – not applicable

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

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