

**ACCESS, LIFT & HANDLERS**

**ALH**



**2019**

Published in the **October** issue of ALH magazine



# ALH A20

## AERIAL PLATFORMS

# Adjusting for

**For the first time in 10 years, the AERIALS20 shows a slight decline in North American access rental fleets. ALH reports.**

**T**he industry has been mumbling about a "softening" for a few months now, and if the AERIALS20 top list is any indication, we might be in for an adjustment.

While the list represents the second-largest

access fleet figure in its history (a total of 403,969 unit,) it's down -2.4 percent over 2018's, in large part to United's fleet fine-tuning.

Still at the top spot, and following a number of high-profile acquisitions, the world's largest

RANK 2019	RANK 2018	COMPANY	FLEET 2019	FLEET 2018	FLEET 2017	% CHANGE 2018-2019
1	1	United Rentals	150,745	158,330	145,833	-4.79%
2	2	Sunbelt Rentals*	104,200	96,500	76,500	7.98%
3	3	Herc Rentals*	29,960	28,000	27,160	7.00%
4	5	Ahern Rentals	29,560	27,231	23,694	8.55%
5	4	H&E Equipment Services	29,157	27,346	21,083	6.62%
6	6	Sunstate Equipment	21,500	20,350	19,100	5.65%
7	8	Equipment Depot	6,000	5,840	5,000	2.74%
8	9	Briggs Equipment*	5,200	5,075	5,055	2.46%
9	10	Star Rentals*	4,150	4,030	4,030	2.98%
10	11	High Reach Co.*	3,200	3,075	2,977	4.07%
11	12	Admar Supply Co. Inc	3,045	2,770	2,600	9.93%
12	14	All Aerials (All Family of Companies)	2,500	2,100	2,100	19.05%
13	13	Able Equipment Rental	2,372	2,178	1,361	8.91%
14	15	Simplex Equipment Rental	2,000	1,801	2,150	11.05%
15	16	American Scissor Lift	1,535	1,350	1,175	13.70%
16	18	Stephenson's Rental Services, Inc.	1,140	1,200	1,050	-5.00%
17	19	ACME Lift Company	1,095	1,063	700	3.01%
18	NEW	Illini Hi-Reach	1,050	1,000	N/A	5.00%
19	NEW	Accès Location +	995	747	N/A	33.20%
20	NEW	Equipment Finders, Inc.	991	763	N/A	29.88%
21	22	Ideal Crane Rental Inc.	844	796	720	6.03%
22	21	AGF Access*	800	800	1,450	0.00%
23	25	Kropp Equipment, Inc.*	695	675	675	2.96%
24	26	Randall Industries*	635	615	610	3.25%
25	27	Birch Equipment Co., Inc.	600	525	510	14.29%

\* - estimated

 **MANITOU**  
HANDLING YOUR WORLD  
www.manitou.com



**YOUR MATER**

# a slowdown?

rental company decreased its aerial fleet size by almost 5 percent, bringing it down to 150,745 from last year's 158,330.

Some might scratch their heads at this decrease, bringing to mind United's acquisitions of RSC, NES, BlueLine and more, but United knows how to right-size its fleet, and it appears it has done just that.

Brent Kuchynka, United Rentals' vice president

**Despite murmurs of a 2020 recession, the rental market should remain stable next year.**

of corporate fleet management, tells *ALH* the market remains stable.

"We're seeing steady rental demand for boom lifts across a range of models, including telescopic, articulating and self-propelled," Kuchynka says. "The 20-foot vertical, electric



lifts continue to be popular due to the versatility of their applications."

Nearly 43,000 pieces of access equipment were acquired by either United Rentals or Sunbelt Rentals over the last few years – and not all of that has been absorbed into current fleets. So, despite this slight decrease in the **A20**, the overall list shows growth from both big and small companies.

Sunbelt, for instance, has broken the six-figure mark for the first time in the company's history, with industry experts estimating roughly 104,200 pieces of access equipment in the company's fleet.

This goes in-hand with its parent company's (Ashtead Group) plan for Sunbelt's presence in North America. In September, Ashtead's Chief Executive, Brendan Horgan, said, "Our North American end markets remain strong and we continue to execute well on our strategy of organic growth supplemented by targeted bolt-on acquisitions."

In excess of \$1 billion will be spent on growing Sunbelt's fleet, while up to C\$60 million will be invested in expanding Sunbelt Canada's fleet. In the first quarter of 2019, \$368 million was channeled into growing the Sunbelt U.S. fleet, and C\$25 million was invested in fleet growth for Sunbelt Canada.



Rental markets could see softening in 2020.

HEAD OFFICE	WEBSITE	PHONE
Greenwich, CT	<a href="http://www.ur.com">www.ur.com</a>	800-877-3687
Fort Mill, SC	<a href="http://www.sunbeltrentals.com">www.sunbeltrentals.com</a>	800-667-9328
Park Ridge, NJ	<a href="http://www.hertzequip.com">www.hertzequip.com</a>	888-777-2700
Las Vegas, NV	<a href="http://www.ahern.com">www.ahern.com</a>	800-400-1610
Baton Rouge, LA	<a href="http://www.he-equipment.com">www.he-equipment.com</a>	877-410-4242
Phoenix, AZ	<a href="http://www.sunstateequip.com">www.sunstateequip.com</a>	888-399-4826
Waco, TX	<a href="http://www.eqdepot.com">www.eqdepot.com</a>	800-835-2128
Dallas, TX	<a href="http://www.briggsequipment.com">www.briggsequipment.com</a>	214-630-0808
Olympia, WA	<a href="http://www.starrentals.com">www.starrentals.com</a>	800-825-7880
Sanford, FL	<a href="http://www.hr2fl.com">www.hr2fl.com</a>	800-860-1648
Rochester, NY	<a href="http://www.admarsupply.com">www.admarsupply.com</a>	800-836-2367
Cleveland, OH	<a href="http://www.allcrane.com">www.allcrane.com</a>	216-986-5190
Deer Park, NY	<a href="http://www.ableequipment.com">www.ableequipment.com</a>	866-468-2666
Montreal, Canada	<a href="http://www.simplex.ca/en">www.simplex.ca/en</a>	800-361-1486
Stockton, CA	<a href="http://www.americanscissor.com">www.americanscissor.com</a>	209-466-3867
Mississauga, Ontario, Canada	<a href="http://www.stephensons.ca">www.stephensons.ca</a>	416-209-1562
Mesa, AZ	<a href="http://www.acmelift.com">www.acmelift.com</a>	877-254-0650
Lemont, IL	<a href="http://www.hi-reach.com">www.hi-reach.com</a>	800-REACH-90
Quebec, Canada	<a href="http://www.acceslocation.com">www.acceslocation.com</a>	866-921-2244
Nashville, TN	<a href="http://www.efitn.com">www.efitn.com</a>	615-313-8334
Madison, WI	<a href="http://www.idealcranerental.com">www.idealcranerental.com</a>	608-241-4092
Quebec, Canada	<a href="http://www.groupeagf.com/en/access">www.groupeagf.com/en/access</a>	877-404-9494
Streamwood, IL	<a href="http://www.kroppequipment.com">www.kroppequipment.com</a>	866-402-2222
Elmhurst, IL	<a href="http://www.randallind.com">www.randallind.com</a>	630-833-9100
Bellingham, WA	<a href="http://www.birchequipment.com">www.birchequipment.com</a>	360-734-5744

## IAL SOLUTIONS HANDLED.



# AERIALS20: Fleet numbers by years

	2019	2018	% change	2017	2016	2015	2014	2013	2012	2011
<b>TOP 5</b>	<b>343,622</b>	337,407	<b>1.84%</b>	294,270	250,366	216,801	215,965	200,327	189,268	158,733
<b>TOP 10</b>	<b>383,672</b>	391,136	<b>-1.90%</b>	348,455	312,775	271,651	266,300	244,517	222,783	201,824
<b>TOP 20</b>	<b>403,969</b>	413,934	<b>-2.40%</b>	373,008	337,371	294,753	289,982	265,615	241,522	222,281

The remaining big five – Herc Rentals, Ahern Rentals and H&E Equipment Services – all increased their aerial fleets, and large independent, Sunstate Equipment, runs tight with the large packs; it’s aerial fleet of 21,500 is inching toward next-in-line H&E’s, which is at 29,157.

Looking at the independents, regional activity was hot, with many reporting double-digit access fleet growth. Equipment Finders, Inc. increased its fleet by almost 30 percent while American Scissor Lift saw a 13.7 percent increase and the All Family of Company’s access division bumped its aerial figure up by 19 percent.

## Caution in the air?

The American Rental Association, which released a revised forecast in August, expects

slower growth than what it previously reported. John McClelland, ARA vice president for government affairs and chief economist, said, “The market for the equipment and event rental industry remains positive, but there definitely are signs that U.S. economic growth is slowing.”

McClelland spoke at the 2019 ALH Conference and told the crowd, “We have seen some softening. But is a recession imminent? Not necessarily.”

McClelland said there’s a 35 percent chance of a 2020 recession but also explained what a recession is: a general slowdown in overall economic activity lasting for a period of two or more consecutive quarters in order to nullify seasonal effects.

Will fleet be resized to adjust to an uncertain market grappling with tariffs and a U.S. Presidential election? We will have to wait and see. ■

## AERIALS20: Survey details

Research for the AERIALS20 list was carried out during the Summer of 2019. Where companies were unwilling to provide data, we made our own estimates based on company financial reports and advice from industry experts. We thank those who participated and made our list stronger than ever.

If you would like to be listed on next year’s AERIALS20, please contact Lindsey Anderson, editor, at (312) 929-4409 or [lindsey.anderson@khl.com](mailto:lindsey.anderson@khl.com).



## SMART DRIVE ACCESS.

GROWTH HACK YOUR BUSINESS WITH BRAVI'S INTELLIGENT APPROACH TO OPERATIONAL WORK SPACES.

SAFELY ACCESS, MULTIPLE POSITIONS, OPTIMISE TASK RATES & OPERATIONS.

**BRAVI**<sup>®</sup>  
PLATFORMS

[WWW.BRAVI-PLATFORMS.COM](http://WWW.BRAVI-PLATFORMS.COM)

## KHL OFFICES

### **UNITED KINGDOM (Head Office)**

KHL Group LLP  
Southfields, Southview Road,  
Wadhurst, East Sussex, TN5 6TP, UK  
Tel: +44 (0)1892 784 088

### **USA HEAD OFFICE**

KHL Group Americas LLC  
3726 East Ember Glow Way,  
Phoenix, AZ 85050, USA  
Tel: +1 480 659 0578

### **USA CHICAGO OFFICE**

KHL Group Americas LLC  
205 W. Randolph Street,  
Suite 1320,  
Chicago, IL 60606, USA  
Tel: +1 312 496 3314

### **USA WAUKESHA OFFICE**

20855 Watertown Road,  
Suite 220,  
Waukesha, WI 53186-1873, USA  
Tel: +1 262 754 4100

### **CHINA OFFICE**

KHL Group China  
Room 769, Poly Plaza, No.14, South Dong  
Zhi Men Street, Dong Cheng District,  
Beijing 100027, P.R. China  
Tel: +86 (0)10 6553 6676

### **SOUTH AMERICA OFFICE**

KHL Group Américas LLC  
Av. Manquehue 151, of 1108,  
Las Condes, Santiago, Chile  
Tel: +56 2 2885 0321

### **GERMANY OFFICE**

KHL Group, Niemöllerstr. 9  
73760 Ostfildern (Stuttgart), Germany.  
Tel: +49 (0)711 3416 7471

