

ACCESS, LIFT & HANDLERS

ALH



2019

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RANK		COMPANY	HEADQUARTERS	FLEET SIZE IN 2019	FLEET SIZE IN 2018	PERCENTAGE CHANGE (2018-2019)
2019	2018					
1	1 ➡	United Rentals	Greenwich, CT	31,420	24,826	26.56%
2	2 ➡	Sunbelt Rentals*	Fort Mill, SC	18,000	15,000	20.00%
3	3 ➡	HERC Rentals, Inc.*	Park Ridge, NJ	6,200	5,700	8.77%
4	5 ⬆	H&E Equipment Services	Baton Rouge, LA	5,900	4,500	31.11%
5	4 ⬆	Ahern Rentals	Las Vegas, NV	4,974	4,513	10.21%
6	6 ➡	Sunstate Equipment Co.	Phoenix, AZ	4,350	3,850	12.99%
7	8 ⬆	Leavitt Machinery*	Langley, BC, Canada	800	730	9.59%
8	8 ➡	Equipment Depot	Houston, TX	760	800	-5.00%
9	12 ⬆	Admar Supply Co. Inc.	Rochester, NY	540	415	30.12%
10	10 ➡	High Reach Co. LLC	Sanford, FL	488	445	9.66%
11	11 ➡	Manulift	Sainte-Foy, QC, Canada	450	425	5.88%
12	13 ⬆	Star Rentals*	Seattle, WA	425	400	6.25%
13	14 ⬆	The ALL Family of Companies (ALL Erection & Crane Rental Corp.)	Cleveland, OH	415	375	10.67%
14	16 ⬆	Rental Equipment Investment Corp (REIC)	Miami, FL	374	291	28.52%
15	15 ➡	Ameco*	Greenville, SC	310	300	3.33%
16	17 ⬆	Cloverdale Equipment Co.	Oak Park, MI	260	245	6.12%
17	19 ⬆	AeroLift	Milford, MI	225	194	15.98%
18	18 ➡	Aerial Access Equipment*	Belle Chasse, LA	210	209	0.48%
19	21 ⬆	Ideal Crane Rental Inc.	Madison, WI	192	165	16.36%
20	20 ➡	NMC*	Omaha, NE	180	175	2.86%
21	22 ⬆	ABLE Equipment Rental	Deer Park, NY	176	164	7.32%
22	23 ⬆	Western One Rentals*	Port Coquitlam, BC, Canada	140	135	3.70%
23	24 ⬆	Battlefield Equipment*	Ottawa, ON, Canada	113	105	7.62%
24	25 ⬆	Associated Supply Company, Inc.	Lubbock, TX	111	105	5.71%
25	26 ⬆	Wagner Rentals*	Ashland, KY	105	96	9.38%
26	27 ⬆	Kirby-Smith Machinery	Oklahoma City, OK	103	90	14.44%
27	29 ⬆	Stevenson Crane Service	Bolingbrook, IL	100	80	25.00%
28	31 ⬆	Bigge Crane and Rigging Co.	San Leandro, CA	95	75	26.67%
29	31 ⬆	Illini Hi-Reach, Inc.	Crown Point, IN	95	75	26.67%
30	32 ⬆	AirWorx Construction Equipment & Supply*	Indianapolis, IN	65	60	8.33%
		Total fleet size:	77,576	64,543	20.19%	

*Denotes estimate



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Still warm

The North American telehandler market is thriving. With double-digit growth on our annual TELEHANDLER30 listing, the rental industry's versatile equipment shows no signs of slowing down. Lindsey Anderson reports.

ALH T30

TELEHANDLERS

There has been plenty of action across the North American rental industry over the last year. Acquisitions and bolt-ons are propelling businesses and overall construction work remains steady. The TELEHANDLER30 backs this up with outstanding growth for 2019

“ 12,000-pound maximum capacity with 55 feet of maximum reach is heavily populated within rental and end user fleets throughout North America. ”

MATTHEW ELVIN, CEO, Xtreme Manufacturing

at 20.19 percent from last year's 64,543 units to this year's 77,576.

The top five companies make up the largest chunk of the T30, with 66,494 units representing the big players; this showcases CapEx spend and acquired fleets that toppled the entire T30 last year.

For the most part, there aren't major surprises or ranking upsets on the TELEHANDLER30 this year. United Rentals sits at the top with 31,420 units in its fleet, a 25.5 percent increase over last year. The company recently reported a good start to 2019, with rental revenue rising by 23 percent to a first-quarter record of \$1.8 billion. This represents a 7.2 percent year-on-year increase.

United reaffirmed its full-year outlook, with total revenue for 2019 expected to be between \$9.15 and \$9.55 billion. Capital expenditure is



United Rentals reported 31,420 telehandlers in its fleet for 2019.

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**ABLE has 176
telehandlers in its fleet.**



forecast in the range from \$1.4 billion to \$1.55 billion, after gross purchases of \$2.15 billion to \$2.3 billion.

Sunbelt, HERC, H&E and Ahern make up the remaining top five, with Ahern and H&E swapping between fourth and fifth compared to last year (H&E taking the number four spot.) H&E increased its telehandler fleet by more than 31 percent due to regional acquisitions and a more buoyant oil and gas market. Ahern saw double-digit growth of 10.2 percent from 4,513 telehandlers to 4,974.

Manufacturers' views

"The 12,000-pound maximum capacity with 55 feet of maximum reach is heavily populated within rental and end user fleets throughout North America," says Matthew Elvin, CEO of Xtreme Manufacturing. "End users have experience when renting and choose to purchase the machine that their operators have been trained on as well as had the most



Bigge added 20 units to its fleet over the last year, from 75 to 95.

“ The 10,000-pound class has proven the test of time and has continued to be the most popular telehandler capacity. ”

BRADEN SPENCE, product manager, Skyjack

field experience operating.”

While the competition between capacity classes is quite close for Skyjack, the company says its largest demand from within the rental industry is for 10,000-pound-capacity machines. Skyjack offers two machines that fall within this category, the SJ1044 TH and SJ1056 TH, which both have a lift capacity of 10,000 pounds and bring materials to maximum heights of 44 feet, 3 inches and 56 feet, 3 inches, respectively.

"Between the two machines, the SJ1056 TH has proven to be the one telehandler that all rental stores make sure to have in their inventory," says Braden Spence, product manager for Skyjack. "Being a true pick-and-place machine, the SJ1056 TH features an industry-leading load chart allowing the operator to lift 6,000 pounds to 56 feet, 3 inches and 3,000 pounds to 42 feet, 6 inches forward reach, all with outriggers down. The 10,000-pound category class has proven the test of time and has continued to be the most popular telehandler capacity class in the North American market."

Survey details

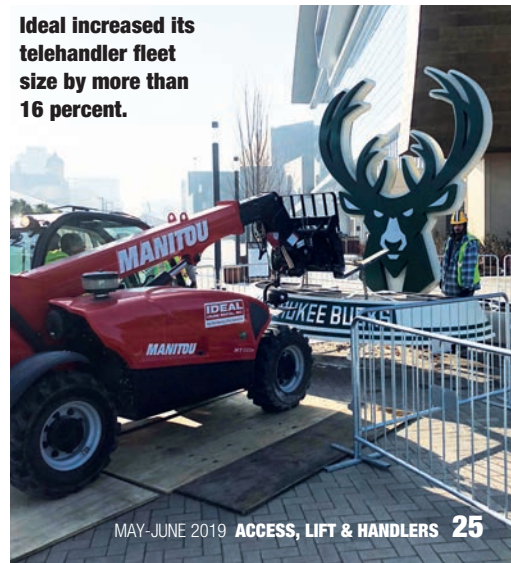
Research for the TELEHANDLER30 was carried out during the Spring of 2019. Where companies were unwilling to provide figures, we made our own estimates based on data from annual reports and advice from industry contacts. Thank you to everyone who contributed.

If you would like to be included in next year's list or would like to get a head start on our upcoming AERIALS20 list, please contact editor **Lindsey Anderson** by calling (312) 929-4409 or emailing lindsey.anderson@khl.com. Please include the size of your current aerial or telehandler fleet, last year's number and your company's website address.

Continued optimism?

As we look forward into 2019, most everyone ALH spoke with expressed a positive outlook for the telehandler market. The industry can anticipate the telehandler market to be positively affected by the continued strength in the construction industry. Additionally, with rental houses and end users becoming increasingly aware of the telehandler's versatility beyond just a pick-and-place machine, this will continue to contribute to this market's growth.

**Ideal increased its
telehandler fleet
size by more than
16 percent.**



Changes in telehandler fleet sizes

	2019	2018	2018-2019 % CHANGE	2017
TOP 5	66,494	58,389	21.9%	46,916
TOP 10	73,432	60,779	20.8%	55,901
ALL	77,576	64,543	20.19%	60,137

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