

The prevailing mood of this year's ACCESS50 listing of companies with the biggest access equipment fleets is a positive one, and there is growth across much of the table. AI reports.

ACCESS50

Upward curve

This year the **ACCESS50** includes telehandlers for the first time. The figure has been separated from the aerial work platform fleet sizes to ensure an accurate comparison to last year's figure and to maintain the longstanding AWP listing.

United Rentals and Sunbelt have the biggest telehandler fleet sizes, taking first and second place, respectively. This matches their customary positions in the main AWP table and cements their claims as the dominant forces in the rental market.

Both companies are based in the US, and looking down the table many fellow US companies also have impressive telehandler fleet sizes. Indeed, they make up a majority of the 'Top 15 telehandler fleets' table. European companies do feature in the list however, with Loxam bucking the trend and coming in

third with its fleet of 4500 telehandlers.

In the AWP list Loxam is in tenth place - two places up from last year - which demonstrates AWP fleet sizes and telehandler figures do not always correlate. Another example of that comes with the two UK-based companies in the list; A-Plant sits at 47th in the AWP league but is ninth in the telehandlers top 15, with 1323 units. Hewden is 11th in the telehandler list but 53rd in the AWP standings.

Some companies with large AWP fleets have few or no telehandlers, notably those based in Japan. Nikken Corp, for example, is fifth in the AWP list but has zero telehandlers. An exception is Kanamoto, which has 300 telehandlers in its fleet. Sticking with companies in Asia; Galmon in Singapore and a new entry AJ Networks in

TOP 50 FLEET SIZES

	2014	% CHANGE	2013	2012	2011	2010	2009	2008	2007	2006	2005
Top 5	220192	7.6	204624	196656	165556	164237	173792	189850	179880	151178	140200
Top 10	295334	8.7	271576	265888	240113	238181	254424	270510	251700	207758	187975
Top 50	523767	8.8	481490	460758	434358	424853	449250	446956	402900	332700	283071

Rank 2014	Company	AWP Fleet 2014	2013	%	Telehandler Fleet	Fleet Details (see key)	Branches	Areas of operation	Country of origin	Website
1 ¹	United Rentals	108203	105486	2.5	18224	S, B, T, M	876	USA, Canada,	USA	www.unitedrentals.com
2 ²	Sunbelt	49406	40332	22.5	8557	S,B, M, H	430	USA	USA	www.ashtead-group.com
3 ³	HERC (Hertz Equipment Rental Co)	22506 ^(est)	20460 ^(est)	10	3850 ^(est)	S, B	345	US, Canada, Europe	USA	www.hertzequip.com
4 ⁴	Lavendon	20677	19646	5.2	460	S, B T	75	Europe, Middle East	UK	www.lavendongroup.com
5 ⁵	Nikken Corp	19400	18700	3.4	0	S, B, T	238	Japan, US, Europe, Thailand UAE	Japan	www.rental.co.jp
6 ⁶	Ahern rentals	17017	15702	8.4	4318 ^(est)	S,B,H	74	USA	USA	www.ahearn.com
7 ⁷	NES Rentals	15350	13300	15.4	1866	S,B,T,M	77	USA	USA	www.nesrentals.com
8 ⁸	H&E Equipment Services	14520 ^(est)	13200 ^(est)	10	2460 ^(est)	S,B,T,H,M	65	USA	USA	www.he-equipment.com
9 ⁹	Sunstate Equipment Co LLC	14250	12500	14	2700	S,B	56	USA	USA	www.sunstateequip.com
10 ¹²	Loxam	14000	11975	16.9	4500	S,B,T	607	Europe	France	www.loxam.com
11 ¹⁰	Cramo	12450	12250	1.6	400	S,B,T,M,H	360	Europe	Finland	www.cramo.com
12 ¹³	Riwal	12237	11954	2.4	626	S,B,T	51	Europe, Middle East, Brazil, India	Netherlands	www.riwal.com
13 ¹⁴	Nishio Rent All	12013	11293	6.3	0	S,B,T,M	295	Japan, Malaysia, Singapore, Thailand	Japan	www.nishio-rent.co.jp
14 ¹¹	Aktio Corp	12000 ^(est)	12000 ^(est)	0	0	S,B	280	Japan	Japan	www.aktio.co.jp
15 ¹⁶	TVH Group	11733	10866	8	822	S,B,T	65	Europe	Belgium	www.tvh.com

Korea, both have thousands in their AWP fleet but also have no telehandlers.

Turning our attention to the main AWP list, there are a number of new entries but they mostly appear at the bottom of the table. Blue Line Rental is an exception in 17th position with its fleet of 10978 AWP's. It changed its name earlier this year from Volvo Rent, following new ownership. In the 2013 table Volvo Rent stood at 37th position with a fleet of 3100. It should be noted, however, that Volvo Rent's figures were estimated for a number of years.

It's the USA-based companies that dominate the top 10, with the exception of European major Lavendon group in fourth place, the previously mentioned Nikken Corp, in fifth, and Loxam, which sneaks in at tenth. European companies come in to their own in the second half of the top 20, taking a majority of places in this part of the table.

Major leaps in fleet sizes are generally found outside the top 20. One of them is performed by Brazil-based Mills. It has a 2014 fleet of 6568, 53% more than last year. Despite that, it still remains in the top 30 as it did last year, up from 30th to 23rd - an

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 AWP fleet sizes above 1000 units were asked to provide quantities of each platform type in their fleet, along with the other details shown in this listing. For the first time this year we have also shown the number of telehandlers in each company's fleet. Where figures have not been available it has been necessary to estimate them based on current market conditions. If you are not included in the list, please take part next year.

TOP 15 TELEHANDLER FLEETS

(Not including estimated entries)

COMPANY	TELEHANDLER FLEET SIZE
United Rentals	18224
Sunbelt	8557
Loxam	4500
Sunstate Equipment	2700
Ahern Rentals	2675
Blue Line Rentals	2406
Kiloutou	2200
NES Rentals	1866
A-Plant	1507
NEFF Corp	1405
Hewden	1323
Salti	1149
ABKS Partnerlift	839
TVH Group	822
Rival	626

Rank 2014	Company	AWP Fleet 2014	2013	%	Telehandler Fleet	Fleet Details (see key)	Branches	Areas of operation	Country of origin	Website
16 ¹⁵	Ramirent	11004 ^(est)	11004	0	505 ^(est)	S,B,M,T,H	40	Slovakia, Ukraine, Russia	Sweden	www.ramirent.com
17 ³⁷	Blue Line Rental (formally listed as Volvo Rent)	10978	3100 ^(est)	254	2406	S,B	132	USA, Canada	USA	www.bluelinerental.com
18 ¹⁷	SystemLift	9600	9300	3.2	1000	S,B,T,M,H	70	Germany, Austria, Switzerland	Germany	www.systemlift.de
19 ¹⁹	Kiloutou	8400	7800	7.7	2200	S,B,T,M	430	France	France	www.kiloutou.fr
20 ²⁰	HSS Hire Group (includes UK Platforms)	8396	6730	24.8	59	S,B	250	UK	UK	www.hss.com www.ukplatforms.com
21 ¹⁸	ABKS PartnerLift	7514	7827	-3.9	839	S,B,T	138	Europe	Germany	www.partnerlift.com
22 ²²	Coates Hire	6570	6350	6.3	440	S,B,T	240	Australia, UK, Indonesia	Australia	www.coates.com.au
23 ³⁰	Mills Estruturas e Srvicos de Engenharia	6568	4292	53	356	S,B,M	51	Brazil	Brazil	www.mills.com.br
24 ²¹	Pekkaniska	6000	6500	0	0	S,B	25	Scandinavia, Eastern Europe, Russia	Finland	www.pekkaniska.com
25 ²³	Boels Rental	5775	5550	4.1	500	S,B,T,M	315	Europe	Netherlands	www.boels.com
26 ²⁵	AFI-Uplift	5598	5492	1.9	24	S,B	21	UK, Middle East	UK	www.afi-group.co.uk
27 ²⁵	Kanamoto	5565	5300	5	300	S,B,T	148	Japan	Japan	www.kanamoto.co.jp
28 ²⁴	Hune	5459	5459	0	474 ^(est)	S,B,T	41	Europe	Spain	www.hune.com
29 ⁴⁰	Galmon	5000	2800	78.6	0	S,B	1	Singapore, Malaysia	Singapore	www.galmon.com
30 ²⁸	GAM	4610 ^(est)	4610 ^(est)	0	460 ^(est)	S,B,T,M,H	100	Europe, North Africa Middle East, South America	Spain	www.gamaquiler.es
31 ³²	Simplex Equipment rental	4235 ^(est)	3850	10	420 ^(est)	S,B,M	42	Canada	Canada	www.simplex.ca
32 ²⁹	Acces Industrie	4192	4488	7.1	893	S,B,T,M	32	Southern Europe, Morocco	France	www.acces-industrie.com
33 ³⁴	Trico Lift	4018	3309	21.42	460	S,B,M	6	USA	USA	www.tricolift.com

LARGEST % GROWTH

(Not including estimated entries)

RANK	COMPANY	% GROWTH
17	Blue Line Rental <small>(formerly listed as Volvo Rent)</small>	254 <small>(previous years' figures were estimated)</small>
29	Galmon	78.6
23	Mills Estruturas e Srvicos de Engenharia	53
20	HSS Hire Group (includes UK Platforms)	24.8
2	Sunbelt	22.5
33	Trico Lift	21.4
10	Loxam	16.9
7	NES Rentals	15.4
9	Sunstate Equipment Co LLC	14
47	A-Plant	13.7

impressive achievement nevertheless. Hitting another high note is Galmon with a 78% rise in fleet size, bringing it up the table from 40th to 29th this year. There are a number of companies with 20% and more increases and they are mainly based in the US. In Europe rental companies are looking at anything between 1% - 10% rises, with companies based in north of the continent edging closer to the 10% mark than their southern counterparts.

A promising sign is that this year's table continues to show growth, particularly in the US, and demonstrates that the rest of the world is generally on an upward curve. The combined fleets of the top 5, 10 and 50 entries bear this out with 7.6 to 8.8% increases between them. All-in-all a steady, yet stable move in the right direction.

AI

Rank 2014	Company	AWP Fleet 2014	2013	%	Telehandler Fleet	Fleet Details (see key)	Branches	Areas of operation	Country of origin	Website
34 ⁴²	Gerken	3780	2475 ^(est)	52	420 ^(est)	S,B,T	15	Europe	Germany	www.gerken-arbeitsbuehnen.de
35 ³¹	Force Access	3731	3957	-5.7	294	S,B,T	16	Australia	Australia	www.forcecorp.com.au
36 ³³	Star Rentals	3638^(est)	3465 ^(est)	5	618 ^(est)	S,B	17	Western USA	USA	www.starrentals.com
37 ³⁶	Solaris Brazil	3552	3200	11	190	S,B	25	Brazil, Argentina	Brazil	www.solarisbrasil.com.br
38 ³⁵	Salti	3478	3202	8.6	1149	S,B,T,M	30	France	France	www.salti.fr
39 ^{New Entry}	AJ Networks	3324	-	-	0	S	3	Korea, Vietnam, Saudi Arabia	Korea	www.ajurental.co.kr
40 ³⁸	Colle	3000	3000	300 ^(est)	0	S,B,T	11	Europe	Netherlands	www.colle.eu
41 ⁴⁶	Height for Hire/ Easi Uplifts	2559	2311	10.7	121	S,B,T,H	14	UK, Ireland, Slovakia, Hungary	Ireland	www.easiuplifts.com
42 ³⁹	NEFF Corp	2502	3000 ^(est)	-16.6	1405	S,B	64	USA		www.neffrental.com
43 ⁴³	Venpa (GV3)	2489	2453	1.5	470	S,B,T	30	Italy, Eastern Europe	Italy	www.gv3.it
44 ⁴¹	All Erection & Crane Rental Corp.	2466	2660 ^(est)	10	458	S,B	37	North America	USA	www.allaerials.com
45 ⁴⁴	Nacanco	2409	2435	-1.1	248	S,B,T	16	Italy	Italy	www.naconco.it
46 ⁴⁵	Kranpunkten i Båstad	2400	2400	0	240	S,B,M,H	4	Sweden	Sweden	www.kranpunkten.com
47 ⁴⁷	A-Plant	2377	2091	13.7	1507	S,B	131	UK	UK	www.aplant.com
48 ^{New Entry}	Brand Energy & Infrastructure Services <small>(formerly known as Harsco Infrastructure)</small>	2300	-	-	20	S,B,M	50	France, Holland, UK	USA	www.beis.com/nl
49 ⁴⁸	Kimberly Group	2007	2080	-3.5	15	S,B	7	UK	UK	www.kimberlygroup.co.uk
50 ⁴⁹	Prangl Gesellschaft	2046	2046	0	289	S,B,T	20	Austria, Europe	Austria	www.prangl.at
51 ⁵⁰	Skyreach	2028	2040	-0.6	123	S,B	10	Australia	Australia	www.skyreach.com.au
52 ^{New Entry}	Instant Access	1350	-	-	0	S,B,M	13	Australia, New Zealand	Australia	www.instantaccess.com.au
53 ⁵¹	Hewden	1217	1500	-18	1323	S,B	31	UK	UK	www.hewden.co.uk
54 ^{New Entry}	GT Access	1078	-	-	0	S,B,T	5	UK	UK	www.gtaccess.co.uk
55 ^{New Entry}	Ramirent SA (Poland)	1100	-	-	100	S,B,M,H	40	Poland	Poland	www.ramirent.pl
56 ^{New Entry}	Belaruslift	935	-	-	64	S,B,T,M,H	6	Belarus	Belarus	www.belaruslift.com

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