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INTERVIEW

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ALH T30 TELEHANDLERS

North
America's
largest
telehandler
fleets



PLUS
Engines | Training | Truck mounts



OFFICIAL NORTH
AMERICAN MAGAZINE

The 2021 ALH TELEHANDLER30 annual fleet ranking reflects how the North American rental market reacted to the global pandemic.

Lindsey Anderson discusses the ups and downs across the board.

Fleet adjustments

(Below) ABLE Equipment says projects are quickly ramping up and the market is strong.

| RANK 2021 | RANK 2020 | COMPANY | HEADQUARTERS | FLEET SIZE IN 2021 | FLEET SIZE IN 2020 | PERCENTAGE CHANGE (2020-2021) | WEBSITE |
|-----------|-----------|---|------------------------|--------------------|--------------------|-------------------------------|-----------------------------|
| 1 | 1 | United Rentals | Greenwich, CT | 28,997 | 31,283 | -7.31% | www.ur.com |
| 2 | 2 | Sunbelt Rentals* | Fort Mill, SC | 20,350 | 20,500 | -0.73% | www.sunbeltrentals.com |
| 3 | 3 | HERC Rentals, Inc.* | Park Ridge, NJ | 6,055 | 6,250 | -3.12% | www.hertzequip.com |
| 4 | 4 | H&E Equipment Services | Baton Rouge, LA | 5,300 | 5,900 | -10.17% | www.he-equipment.com |
| 5 | 6 | Sunstate Equipment Co. | Phoenix, AZ | 4,300 | 4,530 | -5.08% | www.sunstateequip.com |
| 6 | 5 | Ahern Rentals | Las Vegas, NV | 4,064 | 4,978 | -18.36% | www.ahern.com |
| 7 | 7 | Leavitt Machinery* | Langley, BC, Canada | 830 | 825 | 0.61% | www.leavittmachinery.com |
| 8 | 8 | Equipment Depot | Houston, TX | 800 | 800 | 0.00% | www.eqdepot.com |
| 9 | 9 | Admar Supply Co. Inc. | Rochester, NY | 532 | 532 | 0.00% | www.admarsupply.com |
| 10 | 10 | High Reach Co. LLC* | Sanford, FL | 500 | 495 | 1.01% | www.hr2fl.com |
| 11 | 11 | Manulift* | Sainte-Foy, QC, Canada | 455 | 455 | 0.00% | www.manulift.ca |
| 12 | 12 | Star Rentals | Seattle, WA | 405 | 425 | -4.71% | www.starrentals.com |
| 13 | 13 | The ALL Family of Companies (ALL Erection & Crane Rental Corp.) | Cleveland, OH | 430 | 430 | 0.00% | www.allcrane.com |
| 14 | 14 | Rental Equipment Investment Corp (REIC) | Miami, FL | 373 | 362 | 3.04% | www.reicorporation.com |
| 15 | 15 | Ameco* | Greenville, SC | 320 | 320 | 0.00% | www.ameco.com |
| 16 | 16 | Cloverdale Equipment Co. | Oak Park, MI | 325 | 312 | 4.17% | www.cloverdaleequipment.com |
| 17 | 17 | AeroLift | Milford, MI | 245 | 235 | 4.26% | www.aeroliftusa.com |
| 18 | 18 | ABLE Equipment Rental | Deer Park, NY | 274 | 232 | 18.10% | www.ableequipment.com |
| 19 | 19 | Ideal Crane Rental Inc. | Madison, WI | 211 | 198 | 6.57% | www.idealcranerental.com |
| 20 | 20 | NMC* | Omaha, NE | 185 | 180 | 2.78% | www.nmccat.com |
| 21 | 21 | Equipment Finders, Inc. | Nashville, TN | 155 | 153 | 1.31% | www.EFitn.com |
| 22 | 22 | Associated Supply Company, Inc. | Lubbock, TX | 120 | 120 | 0.00% | www.ascoeq.com |
| 23 | 23 | Battlefield Equipment* | Ottawa, ON, Canada | 118 | 115 | 2.61% | www.battlefieldequipment.ca |
| 24 | 24 | Stevenson Crane Service* | Bolingbrook, IL | 110 | 105 | 4.76% | www.stevensoncrane.com |
| 25 | 25 | Kirby-Smith Machinery | Oklahoma City, OK | 105 | 103 | 1.94% | www.kirby-smith.com |
| 26 | 26 | Bigge Crane and Rigging Co.* | San Leandro, CA | 110 | 100 | 10.00% | www.bigge.com |
| 27 | 27 | Illini Hi-Reach, Inc. | Crown Point, IN | 95 | 95 | 0.00% | www.ihl-reach.com |
| 28 | 28 | Atlantic Lift Systems | Norfolk, VA | 75 | 70 | 7.14% | www.atlanticliftsystems.com |
| 29 | 29 | AirWorx Construction Equipment & Supply* | Indianapolis, IN | 67 | 65 | 3.08% | www.airworxcorp.com |

*Denotes estimate

The 2021 TELEHANDLER30, ALH's annual ranking of North America's largest telehandler rental fleets, declined -7.31 percent this year at 75,906 units compared to last year's 80,168. It's not too surprising given the fact most economies around the world were paused in response to the global pandemic, forcing rental operations to restructure and de-fleet for cost-saving measures.

Looking at the top six companies on the T30, all reported decreases in their telehandler fleet sizes, with top-spot-holder United Rentals reducing its number by -7.31 percent to 28,997 from 2020's 31,283.

While the world's largest telehandler fleet owners rightsized, the biggest shift to note amongst the top players is Sunstate Equipment's leap into the top five, having previously ranked sixth for the past four years. Sunstate reduced its telehandler fleet by just over -5 percent, reporting a total of 4,300 units, leap-frogging Ahern Rentals, which has long been a top-five operation.

Ahern, however, cut more than -18 percent of its telehandler fleet size, reporting a total of 4,064 units compared to last year's 4,978.

But when we look further down the list, mid-sized and independent rental companies appear to have weathered the storm without much de-fleeting; a silver lining.

Big gains from the middle

Once again, New York-based ABLE Equipment Rental upped its telehandler fleet by double digits, adding 42 units to its fleet to bring it to a total of 274.

Philippe Bisson, director of ABLE's telehandler and rotator division, said the rental company saw an increase in demand for rotating telehandlers and special applications/ attachments mainly for steel erection, concrete, framing and glass applications.

"We've seen a big return of projects from a year ago," Bisson told ALH. "We expect the market to



grow as demand is increasing for residential renovation and new construction, in addition to industrial and distribution projects. The approval of the Infrastructure Bill will boost the demand even more as they are widely used for these projects."

A little further up the list, Admar Supply Company remained at 532 units, with Executive Vice President Richard DiMarco II telling ALH the company did purchase 15 units last year in order to replace older models. Admar has 25

additional units on order to be delivered later this year.

Despite utilization being down for the last 12 months, DiMarco said the company expects business to increase to 2019 levels later this year.

"New equipment is back ordered up to six to seven months," he said. "So we are keeping our used [units] until we can get replacements."

The Pacific Northwest's



ABLE Equipment has invested in Magni units, right.

Star Rentals “faired well through Covid-19,” said President Bob Kendall. “Albeit our marketplace has certainly been negatively impacted.”

Star Rentals’ telehandler fleet declined by just around an estimated -5 percent, with Kendall noting nonresidential construction work took the largest hit.

“We still have major projects in both downtown Seattle and Portland that are restricted to 50-60 percent capacity and using far less equipment than normal,” Kendall noted. “Many new projects that were in the pipeline for 2021 remain postponed, suspended, if not cancelled indefinitely.”

Kendall said while work related to hospitality, office space, etc., is off dramatically, warehousing, distribution, education and healthcare-related jobs are still moving forward, but not at full speed.

“Our sense is that it may still take until September 2021 to really fully understand where we are at and where we are going,” Kendall said. “No doubt there is a lot of pent-up



Michigan-based Aero Lift saw a return to business this year and added more than 10 units to its telehandler fleet lineup

Survey details

Research for the TELEHANDLER30 was carried out during the Spring of 2021. 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.

demand that will be released at some point. But the big question is how long will it take to gain traction.”

From the manufacturers

The overall decrease in telehandler fleet sizes runs parallel with recent equipment manufacturer financial results.

While overall positive, JLG’s Q2 results showed a -19.4 percent decline in telehandler sales compared to 2020’s Q2 at \$175.2 million compared to last year’s \$217.6 million.

At Terex AWP, access equipment sales of \$477 million were down -7 percent compared to last year, driven by the decline in North America last year, said John Garrison, Terex Corporation’s chairman and CEO. Despite the decrease, Garrison noted the two fastest-growing markets right now are the U.S. and China.

“Both of those are weighted toward AWP’s versus telehandlers,” Garrison said in a call with investors. “The U.S., because the AWP fleet, which is the largest, needs to be replaced.

Bonus

Lindsey Anderson asks Michigan-based Aero Lift how the company has fared over the last 12 months. President Jim Koontz said the company is up significantly over 2020. “Housing markets were generally ‘non-essential’ and were shut down,” Koontz said. “Now, housing is very strong.” The exclusive podcast can be listened to within the digital edition or via ALH’s website, www.accesslifthandlers.com.

And we’re seeing that start to happen.”

Terex AWP is still expecting double-digit gains for its aerial and telehandler division, however, with 30 percent year-over-year growth being forecasted.

The company recently announced it will move its GTH telehandler production from Oklahoma City to Monterrey, Mexico in 2022, and will close its facility in Oklahoma as a result.

Changes in telehandler fleet sizes

| | 2021 | 2020 | 2020-2021 % CHANGE | 2019 |
|---------------|---------------|--------|--------------------|--------|
| TOP 5 | 65,002 | 68,911 | -5.67% | 66,494 |
| TOP 10 | 72,183 | 76,093 | -5.14% | 73,432 |
| ALL | 75,906 | 80,168 | -7.31% | 77,576 |