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OFFICIAL NORTH AMERICAN MAGAZINE

INSIDE: **SCAFFOLD & ACCESS MAGAZINE**



**NEW FOR 2022**

# Fleet ALH growth A20

AERIAL PLATFORMS

The largest access equipment rental companies in North America

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# Market moves

This year's AERIALS20 toplist not only shows double-digit fleet growth for some of the largest access equipment rental companies in the world, but a number of surprises along the way. ALH reports.

**ALH**  
**A20**  
AERIAL PLATFORMS

Despite a slight dip in its aerial fleet size, H&E Equipment Services remains one of the top five largest aerial equipment providers in North America.

PHOTO: H&E EQUIPMENT SERVICES

RANK 2022	RANK 2021	COMPANY	HEAD OFFICE	FLEET 2022	FLEET 2021	% CHANGE 2021-2022	WEBSITE
1	1 ▶	<b>United Rentals</b>	Greenwich, CT	<b>160,560</b>	146,738	<b>9.42%</b>	www.ur.com
2	2 ▶	<b>Sunbelt Rentals</b>	Fort Mill, SC	<b>140,000</b>	120,000	<b>16.67%</b>	www.sunbeltrentals.com
3	5 ▲	<b>Herc Rentals</b>	Park Ridge, NJ	<b>38,100</b>	28,750	<b>32.52%</b>	www.hertzequip.com
4	3 ▼	<b>Ahern Rentals</b>	Las Vegas, NV	<b>30,185</b>	31,432	<b>-3.97%</b>	www.ahern.com
5	4 ▼	<b>H&amp;E Equipment Services</b>	Baton Rouge, LA	<b>23,250</b>	29,200	<b>-20.38%</b>	www.he-equipment.com
6	6 ▶	<b>Sunstate Equipment</b>	Phoenix, AZ	<b>23,200</b>	20,900	<b>11.00%</b>	www.sunstateequip.com
7	7 ▶	<b>Equipment Depot</b>	Waco, TX	<b>6,650</b>	6,500	<b>2.31%</b>	www.eqdepot.com
8	8 ▶	<b>Briggs Equipment*</b>	Dallas, TX	<b>5,400</b>	5,300	<b>1.89%</b>	www.briggsequipment.com
9	10 ▲	<b>ABLE Equipment Rental</b>	Deer Park, NY	<b>4,585</b>	<b>3,829</b>	<b>19.74%</b>	www.ableequipment.com
10	9 ▼	<b>Star Rentals*</b>	Olympia, WA	<b>4,300</b>	4,150	<b>3.61%</b>	www.starrentals.com
11	12 ▲	<b>Admar Supply Co. Inc</b>	Rochester, NY	<b>3,100</b>	3,065	<b>1.14%</b>	www.admarsupply.com
12	11 ▼	<b>High Reach Co.*</b>	Sanford, FL	<b>3,025</b>	3,000	<b>0.83%</b>	www.hr2fl.com
13	13 ▶	<b>All Aerials (All Family of Companies)</b>	Cleveland, OH	<b>2,350</b>	2,350	<b>0.00%</b>	www.allcrane.com
14	14 ▶	<b>Simplex Equipment Rental</b>	Montreal, Canada	<b>2,150</b>	2,100	<b>2.38%</b>	www.simplex.ca/en
15	16 ▲	<b>American Scissor Lift</b>	Stockton, CA	<b>1,650</b>	1,606	<b>2.74%</b>	www.americanscissor.com
16	17 ▲	<b>Rental Equipment Investment Corp.</b>	Kalispell, MT	<b>1,500</b>	1,414	<b>6.08%</b>	www.reicorporation.com
17	18 ▲	<b>Equipment Finders, Inc.</b>	Nashville, TN	<b>1,344</b>	1,195	<b>12.47%</b>	www.efitn.com
18	20 ▲	<b>Birch Equipment Co., Inc.</b>	Bellingham, WA	<b>1,200</b>	1,097	<b>9.39%</b>	www.birchequipment.com
19	19 ▶	<b>Accès Location +</b>	Quebec, Canada	<b>1,150</b>	1,100	<b>4.55%</b>	www.acceslocation.com
20	21 ▲	<b>Illini Hi-Reach</b>	Lemont, IL	<b>1,100</b>	1,050	<b>4.76%</b>	www.hi-reach.com
21	22 ▲	<b>Ideal Crane Rental Inc.</b>	Madison, WI	<b>850</b>	847	<b>0.35%</b>	www.idealcranerental.com
22	23 ▲	<b>Kropp Equipment, Inc.*</b>	Streamwood, IL	<b>715</b>	700	<b>2.14%</b>	www.kroppequipment.com
23	24 ▲	<b>Randall Industries*</b>	Elmhurst, IL	<b>675</b>	650	<b>3.85%</b>	www.randallind.com

\*Denotes estimate



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**N**orth America's largest rental companies might be facing ongoing challenges regarding delayed access equipment deliveries, but according to this year's AERIALS20 ranking, almost every firm listed grew its fleet from 2021 to 2022, with the overall AERIALS20 reporting a 9.61 percent increase for a total of 457,039 units.

Quite possibly the biggest shake-up on the list comes from Herc Rentals, who leapfrogged both Ahern Rentals and H&E Equipment Services to firmly position itself as the third-largest access equipment renter with 38,100 units reported.

The massive 32 percent increase from Herc aligns with the company's overall expansion strategy and expected fleet investment of \$900 million to \$1.2 billion for the year. This momentum "demonstrates the acceleration in growth we are achieving with our investments and fleet and M&A," Larry Silber, president and

CEO of Herc Rentals said recently. "As you can see, we have truly shifted into high gear. We've come a long way in the six years since we went public and I'm proud of the tremendous strides that we've made."

### Movers and shakers

Looking at the top five, which represents a total of 392,095 aerials and nearly 86 percent of the total AERIALS20 fleet listing, United remains the top player, reporting a total aerial fleet size of 160,560 units this year. Sunbelt, which has meticulously executed its Sunbelt 3.0 strategy, also stays put as the second-largest access equipment fleet provider, increasing its aerial count from an estimated 120,000 units last year to 140,000 today. Meanwhile, Herc moved into third as both H&E Equipment Services and Ahern Rentals decreased their access fleet totals, with H&E reducing its fleet by

**ABLE Equipment Rental grew its access fleet size by nearly 20 percent this year.**

**PHOTO: ABLE EQUIPMENT RENTALS**

-20 percent and Ahern -3 percent.

Further down the list, New York-based ABLE Equipment Rental continues its steady expansion, moving up a spot to ninth with a nearly 20 percent increase year-over-year. ABLE has long been listed on the AERIALS20, having invested in growing its fleet each cycle. When looking back to just three years ago, the company reported a total of 2,372 units in its aerial fleet, nearly half of what it rents today. (For more on ABLE's path and market expectations, see our exclusive interview with the company in this issue.)

## AERIALS20: LOOKING BACK: 10 YEARS OF ACCESS EQUIPMENT RENTAL FLEET NUMBERS

	2022	2021	12 MONTH CHANGE	2020	2019	2018	2017	2016	2015	2014	2013
<b>TOP 5</b>	<b>392,095</b>	356,120	<b>10.10%</b>	345,091	343,622	337,407	294,270	250,366	216,801	215,965	200,327
<b>TOP 10</b>	<b>436,230</b>	396,799	<b>9.94%</b>	385,117	383,672	391,136	348,455	312,775	271,651	266,300	244,517
<b>AERIALS20</b>	<b>457,039</b>	416,973	<b>9.61%</b>	408,770	403,969	413,934	373,008	337,371	294,753	289,982	265,615

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## More growth to come?

Beyond those staggering figures, the AERIALS20 shows a resilient and positive market for access equipment, with fleet sizes increasing across the board for companies listed 11th through 23rd averaging out to more than 3 percent.

With equipment delivery delays expected to continue quite possibly well into 2024, according to industry sources, the access rental sector will be one to keep an eye on over the next 12 months as renters scramble to secure equipment all while trying to keep up with steadily strong, and growing, demand. ■



**United Rentals saw a 9 percent increase in its access fleet this year.**  
PHOTO: UNITED RENTALS



**Herc Rentals had the largest aerial fleet increase of any company on this year's A20.**  
PHOTO: HERC RENTALS

## Survey details

Research for the AERIALS20 list was carried out during the Summer of 2022. 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).

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