Less talk, more work







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UK & Irela per la motorUK & Irela per la mot

The 12 months since our last survey of the UK and Ireland crane, access and telehandler rental industry has been relatively stable compared to the previous three or four. This has been particularly true of small to medium sized businesses which have regained sufficient confidence to both renew and even expand their fleets. The story varies enormously between the three different product groups that we cover with demand for telehandlers continuing to grow, while access recovers at a steady pace and cranes are beginning to regain some stability after a very rocky period.

While overall growth of the fleet has been modest to non-existent there has been a good deal of renewal and product fleet restructuring. This has been particularly true in the crane market where the re-emergence of attractive and relatively easy finance packages have encouraged companies to replace older cranes and releasing some of the equity to help fund the business. On the access front the overall numbers are up substantially thanks to very strong growth in low level machines and the expansion of general rental companies into the sector.



The make-up of the crane hire sector has changed little over the past year with most companies having pulled through and looking slightly more positively about the future. The number of fleets with larger capacity cranes has grown with the most notable expansion being in the 300 to 800 tonne range where the 'permanent' fleet has doubled in 12 months. At the same time the number of 1,200 tonne units has fallen as international companies have moved them to other locations and locals have chosen to go with 750 tonne boom-on alternatives.

The access market continues to see a gradual consolidation, partly through acquisitions and partly through the growing importance of general rental companies such as HSS, Speedy, Hire Station, A-Plant and to a lesser extent Hewden. At the same time the number of 'national contracts' continues to increase, albeit at a slower pace, tying up equipment supply to many of the UK's largest contractors. For telehandlers, the picture is a little different. While still largely the domain of general rental companies - only A-Plant and Hewden among the national chains have a significant presence in the market although UK Forks is a division of Vp - the bulk of the business is taken by small to mid-sized generalists with the one big independent specialist Fork Rent.

Methodology

As in previous years forms were sent out to every company that we felt might qualify as one of the 30 largest overall or niche fleets and those that have large machines. We also advertised the survey online at www.vertikal.net. The most likely candidates are sent reminders and then followed up with telephone calls. Finally if all else fails or a company refuses to send anything we estimate the fleet size, often with the help of others

top 30

knowledgeable in the industry to do a 'reality check'. As always our aim is to keep the number of estimated fleets to less than five percent or a couple of companies per chart. This year we have again achieved that target in almost all areas.

We are of course aware that while most companies do treat the exercise seriously, some cannot help but exaggerate or understate their fleets, depending on their strategy or mentality. When we spot one that is clearly odd we do try and check it with their peers and may from time to time tweak the numbers via our own estimate. One thing that we know for sure is that some errors will creep in so we do ask readers to inform us of any discrepancies they might spot.

Finally and most importantly we would like to thank all of the companies that participated and who took the time to help and support us as sponsors, in what we hope proves to be a very useful report.





The crane hire market has eased a little over the past 12 months and is looking quite a bit more promising. A good number of the medium to large companies have invested in new cranes this year, although most have been replacements and upgrades rather than for fleet expansion.



Some have also changed the mix of cranes in their fleet in terms of types and capacities. The most notable change perhaps is King Lifting expanding its fleet slightly and nudging ahead of Bronzeshield with the third largest mobile crane fleet after Ainscough and Hewden.

1	ГОР	30	MOBI	LE CR	ANE H	IRERS	S	
Company	Total		ATs/RTs Trucks	Crawlers over 12t	Crawlers under 12t	Mobile Tower Cranes	Industrial Pick & Carry	Spider Cranes
Ainscough	458		448	0	0	3	7	0
Hewden	125		125	0	0	0	0	0
King Lifting	83		74	0	3	1	3	2
Bronzeshield	71		64	0	0	5	0	2
Baldwins	65		65	0	0	0	0	0
Marsh Plant	62	-	62	0	0	0	0	0
Quinto	62	-	56	0	0	2	3	1
Emsley	56		55	0	0	1	0	0
ALE	56	NEW ENTRY	45	11	0	0	0	0
Emerson	54		42	0	6	0	0	6
Mammoet	44		44	0	0	0	0	0
City Lifting	43		17	1	4	17	0	4
Southern Cranes	40		37	0	0	2	1	0
Sparrows	40	-	25	0	10	0	0	5
Hird	40		0	0	0	0	28	12
Davies Crane Hire	38		36	1	0	0	1	0
Bob Francis	38		22	15	1	0	0	0
NMT Crane Hire	37		34	0	0	3	0	0
Whyte Crane Hire	35	—	35	0	0	0	0	0
John Sutch Cranes	35		32	0	0	3	0	0
William O'Brien	32		32	0	0	0	0	0
McNally's Crane Hire	32		26	6	0	0	0	0
Bryn Thomas Cranes	29		20	0	2	4	3	0
Specialist Hire Group	28		25	0	0	0	3	0
MacSalvors	26	—	26	0	0	0	0	0
Kavanagh Crane Hire	26		24	0	0	2	0	0
Crowland Cranes	26		22	0	0	0	2	2
Sarens UK	26	-	13	13	0	0	0	0
Dewsbury & Proud	25	—	22	0	1	0	0	2
J Hewitt Crane Hire	24	-	24	0	0	0	0	0
Crane Hire Ltd	21		20	0	0	0	0	1
ABA Crane hire	20	-	20	0	0	0	0	0
Port Services	19		18	1	0	0	0	0
Millenium Crane Hire	18	-	18	0	0	0	0	0
Flack size in the las	410		. h			d	Demesium	

Fleet size in the last 12 months has: A Increased V Decreased - Remained the same



TOP CRAWLER CRANE HIRERS					
Company	Total	Full size	Mini		
Weldex	113	111	2		
NRC Plant	78	60	18		
AGD	64	44	20		
BPH	44	44	0		
Select Plant	40	38	2		
Q-Plant	30	30	0		
Bob Francis	16	15	1		
Sarens UK	13	13	0		
JT Cranes	14	0	14		
ALE	11	11	0		
Emerson	6	0	6		
McNally's Crane Hire	6	6	0		

TOP MINI	CRAWLER	CRANE	HIRERS
Company	Total	Mini	Spider Crane
GGR UNIC	145	6	139
Easi Uplifts	25	0	25
TCA Lifting	20	0	20
NRC Plant	18	18	0
Coppard Plant	15	0	15
JT Cranes	14	14	0
Hird	12	0	12
Sparrows	10	0	10









LARGEST TOWER CRANES					
Company	Capacity	Model			
Select	720tm	Comedil CTT 721-40			
HTC Plant	710tm	Wolff 700B			
Falcon Crane Hire	410tm	Jaso J600			
Bennetts Cranes	316tm	Jost JL316.16			
London Tower Crane	293tm	Yongmao STT293			
City Lifting	290tm	Comansa 21LC290			
Mantis	130tm	Saez TLS65			
Ladybird Cranes	88tm	Potain MCT 88			

Cranes continued



top 30



TOP 10 TOWER CRANE COMPANIES					
Company	Total Units	Self Erectors	Top Slewers		
Select Plant	288	0	288		
HTC Plant	245	0	245		
Falcon Crane Hire	184	22	162		
London Tower Crane	160	20	140		
Mantis Cranes	103	89	14		
City Lifting	85	12	73		
Ladybird	66	39	27		
Bennetts Cranes	58	3	55		
Irish Cranes & Lifting	29	0	29		

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LARGES	T MOBILE	CRANES
Company	Capacity t	Model
Sarens UK	1,200	Gottwald AK680/3
Mammoet	1,200	Liebherr LTM11200
Port Services	1,000	Terex Demag TC2800-1
Baldwins	1,000	Liebherr LTM 11000D
Ainscough	1,000	Liebherr LTM11000
William O'Brien	800	Terex Demag AC800
McNally's Crane Hire	750	Liebherr LG1750
Crane Hire Ltd	750	Liebherr 1750-9.1
Whyte Crane Hire	750	Liebherr LG1750
Bronzeshield	500	Liebherr LTM1500-8.1
John Sutch Cranes	500	Liebherr LTM1500
ALE	400	Liebherr LTM1400
NMT Crane Hire	400	Terex Demag AC400
Davies Crane Hire	400	Tadano ATF400G-6
Kavanagh Crane Hire	350	Terex Demag AC350
King Lifting	350	Terex Demag AC350/6
Peterborough Crane Hire	300	Grove GMK 6300
City Lifting	220	Tadano ATF 220G-5
Crowland Cranes	220	Tadano ATF 220G-5
PP Engineering	220	Tadano ATF 220G-5
Horizon Crane Hire	220	Tadano ATF 220G-5
ABA Crane Hire	220	Grove GMK5220
Quinto	220	Grove GMK5220
Southern Cranes	220	Grove GMK5220
Walsh Crane Hire	220	Liebherr LTM1220-5.2
Emerson	200	Liebherr LTM1200-5.1
Emsley	200	Liebherr LTM1200/5
APC Crane Hire	200	Liebherr LTM1200 5.1
Specialist Hire Group	200	Terex-Demag AC200-1
Sparrows	200	Terex-Demag AC200-1
Lifterz Crane Hire	200	Liebherr LTM1200-5.1
Bryn Thomas	200	Liebherr LTM1200-5.1
J Hewitt Crane Hire	180	Grove GMK5180
Marsh Plant	130	Liebherr LTM1130-5.1
County Lifting	130	Liebherr LTM1130-5.1
Bob Francis	130	Grove GMK5130
Dewsbury & Proud	130	Grove GMK5130
Millenium Crane Hire	120	Terex Demag AC120-1
Hewden	100	Terex Demag AC100
Raymond Crane Hire	100	Grove GMK4100L





CRANE	COMPANIES A	ND INVESTA	AENT
Company	Investment	Depots	Employees
ALE	£20,000,000	33	950
Veldex	£18,000,000	2	140
Ainscough	£11,500,000	28	1,058
VicNally's Crane Hire	£11,400,000	6	350
Port Services	£9,515,000	3	75
Bronzeshield	£8,000,000	4	85
alcon Crane Hire	£8,000,000	1	267
King Lifting	£5,200,000	8	178
John Sutch Cranes	£4,000,000	2	75
Emsley Crane Hire	£3,200,000	2	83
Emerson	£2,500,000	1	115
Davies Crane Hire	£2,300,000	4	50
City Lifting	£2,000,000	2	95
Varsh Plant	£2,000,000	6	105
Bryn Thomas	£1,900,000	4	48
Southern Cranes	£1,850,000	4	76
VMT Crane Hire	£1,800,000	3	54
GGR UNIC	£1,000,000	3	100
ifterz Crane Hire	£1,000,000	1	16
Quinto	£1,000,000	7	122
County Lifting	£750,000	1	25
lewden	£750,000	18	170
Hird	£700,000	3	55
Specialist Hire Group	£600,000	3	41
NRC Plant	£500,000	2	36
Berry Crane Hire	£400,000	1	13
.adybird	£350,000	1	17
AGD	£250,000	1	73
Kavanagh Crane Hire	£200,000	4	50



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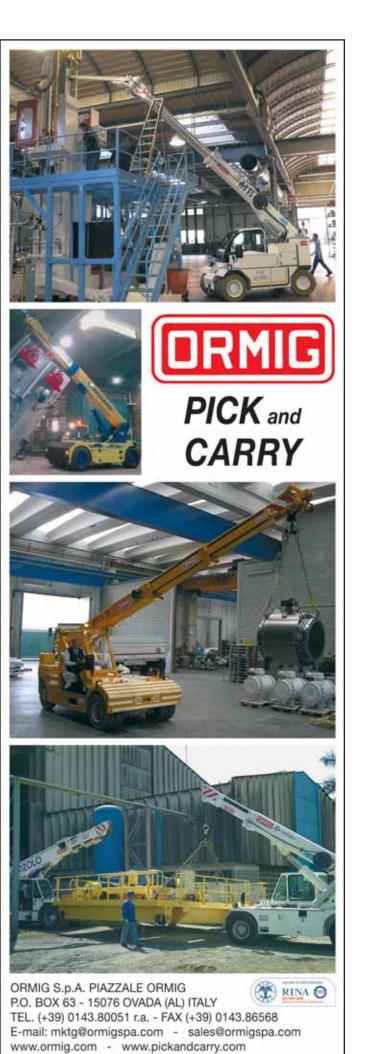


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LARGEST CRAWLER CRANES					
Company	Capacity t	Model			
Weldex	1,800	Liebherr LR 11350 + P Boom			
ALE	1,600	Terex CC8800-1			
Sarens UK	1,250	Terex CC6800			
McNally's Crane Hire	1,200	Liebherr LTR 11200			
Port Services	650	Terex CC3800			
Ainscough	600	Terex CC2800			
BPH Equipment	250	Kobelco CKE2500			
Q-Plant	180	Kobelco CKE1800			
NRC Plant	150	Sumitomo SC1500-2			
HTC Plant	120	Sumitomo SCX120-2			
AGD Equipment	120	IHI CCH1200			
Bob Francis	100	Manitowoc 1000			
City Lifting	95	Liebherr			
Davies Crane Hire	60	Terex TCC60			







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Access

There have been substantial changes at the top of our chart this year with general rental company HSS acquiring UK platforms - last year's number seven - from Haulotte, which together with its large low level fleet propelled it to the number two slot. This in spite of last year's number two -AFI - acquiring ninth largest Hi-Reach taking its fleet to more than 5,000 units. Another point to note is the steady expansion of the truck mounted lift market as more general rental companies give it a try at the same time as the specialists continue to expand.



TOP TRUCK MOUNTED FLEETS Trucks Company Total Vans Nationwide Platforms 572 304 268 Access Hire Nationwide 522 40 482 85 Loxam 205 120 Smart Platform Rental 102 108 6 Facelift 103 75 28 Easi Uplifts 103 31 72 41 41 0 Orion Access Manlift Hire 27 26 1 Warren Access 26 10 16 25 Blade Access 25 0 15 AFI 15 0 AA Access 12 12 0 Rapid Platforms 11 11 0





		TOP 30 P	OWERED A	CCESS CON	IPANIES			
Company	Total	Boom Lifts	Scissor Lifts	Spider Lifts	Push Arounds	Truck Mounts	Van Mounts	Trailer Lifts
Nationwide Platforms	10,936 🔺	3,899	5,165	0	1,292	304	268	8
HSS Hire inc. UK Platforms	6,979 🔺	1,641	4,146	0	1,068	0	0	124
AFI inc. Hi-Reach	5,210 🔺	1,833	2,690	12	652	15	0	8
Vp Hire Station	2,500 NEW ENTRY	0	0	0	2,500	0	0	0
Easi UpLifts	2,409 🔻	1,310	842	88	55	31	72	11
A-Plant	2,406 🔻	981	1,159	45	221	0	0	0
Speedy	2,033 🔻	0	605	0	1,427	0	0	1
Kimberly	2,028 🔻	823	1,150	3	52	0	0	0
Loxam	1,510 🔻	550	750	5	0	85	120	0
Hewden	1,500 🔻	800	700	0	0	0	0	0
Plantfinder	1,260	400	600	10	250	0	0	0
Charles Wilson	909	420	430	5	51	0	0	3
Facelift AL	787	251	353	31	7	75	28	42
GT Access AA	750	228	448	18	50	1	0	5
Lifterz AL	659	222	316	0	117	1	0	3
Elavation	600	125	375	0	100	0	0	0
Riwal	525	203	310	11	0	1	0	0
Access Hire Nationwide	522	0	0	0	0	40	482	0
Horizon Platforms AA	464	88	323	0	52	0	0	1
Highway Plant AL	450	155	250	5	25	0	0	15
Prolift Access AA	375 ENTRY	114	214	2	39	2	1	3
KDM Hire <i>AA</i>	359	93	227	6	24	3	0	6
Platform Sales & Hire AA	350 ENTRY	94	233	3	17	0	0	3
London Tower Service AA	334	74	180	0	80	0	0	0
Mr Plant Hire <i>AA</i>	319	52	153	2	112	0	0	0
Manlift Hire	308	158	110	7	3	26	1	3
Smiths Equipment Hire	305 ENTRY	60	179	2	60	0	0	4
Aerial Platform Hire	300	120	160	10	5	0	0	5
Hird AL	286	111	157	5	12	0	0	1
Advanced Access AL	284 ENTRY	62	156	5	57	0	0	4
1 Up Access AA	274 ENTRY	121	130	0	20	1	0	1
GPT	260 ENTRY	125	125	0	0	0	0	10
2 Cousins AL	260	82	169	6	3	0	0	0
PAS	240 -	113	109	0	0	0	0	0
Premier Platforms AA	210	80	127	0	6	2	0	1
Brightcast Platforms AL	173 ENERY	37	112	0	24	0	0	0
One Stop Hire	163 ENTRY	0	26	0	137	0	0	0
Bella Access	154 <u>ENTRY</u>	41	96	0	16	1	0	0
Clements	135 -	50	60	3	10	0	2	10
Southern Cranes & Access	126	64	62	0	0	0	0	0
Huntley Plant AL	120 112 NEW ENTRY	42	70	0	0	0	0	0
Huntley Plant AL Higher Access		4Z 0	0	102	0	0	0	0
	102	23	25		0		0	-
Orion Access		23	25	12 14	0	41 11	0	0
Rapid Platforms	76 🔻	24	20	14	0	11	0	1

Fleet size in the last 12 months has: 🔺 Increased 🔻 Decreased – Remained the same 🛛 AA - Access Alliance 🛛 AL - Access Link



Access continued





LARGEST SCISSOR LIFTS

LAKULJIJ	
Company	Height & Model
PAS	32m Liftlux SL320
HSS Hire	31.7m Holland Lift G-320
Riwal	31.7m Holland Lift G-320
AFI	31.7m Holland Lift G-320
Hewden	31.7m Holland Lift G-320
Nationwide Platforms	30m HAB S320-28
Kimberly	26m Liftlux SL260-25
Aerial Platform Hire	26m Liftlux SL260-25
Easi Uplifts	24.5m Liftlux SL245-25
A-Plant	24m JLG 245/25
Manlift Hire	21m Liftlux 2312
KDM Hire	20.5m Liftlux SL205 25
Lifterz	20.5m PB 225-12
Platform Sales & Hire	16.5m Holland Lift 165
Horizon Platforms	16.5m Holland Lift 165
1 Up Access	16m Genie GS5390
Charles Wilson	16m Genie GS5390
Plantfinder	16m JLG 180-12
Active Rentals	16m Genie GS5390
GPT	16m Genie GS5390
Loxam	16m Genie GS5390
Hird	16m Genie GS5390
Elavation	16m Genie GS5390
TCA Lifting	16m Genie GS5390
GT Access	15m Holland Lift
Premier Platforms	13.5m Skyjack 9250
Facelift	13.5m Skyjack 9250
Brightcast Platforms	13.5m Skyjack 9250
Bella Access	13.5m Skyjack 9250
London Tower Service	13.5m Skyjack 9250
Rapid Platforms	13.5m Skyjack 9250
Huntley Plant	13.5m Skyjack 9250
Advanced Access	13.5m Skyjack 9250
Prolift Access	13.5m Skyjack 9250











LARGEST TRUCK MOUNTED LIFTS

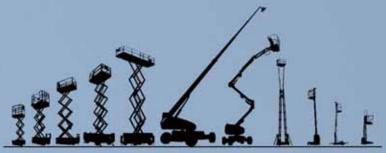
Company	Height & Model
Blade Access	101m Palfinger WT1000
Easi Uplifts	88m Bronto S90HLA
Nationwide Platforms	68m Bronto S70XDT
AA Access	68m Bronto S70XDT
Riwal	68m Bronto S70XDT
Outreach Access	68m Palfinger WT700
Loxam	63m Multitel J2365TA
Facelift	59m Bronto S61XDT
Orion Access	59m Palfinger WT610
Manlift Hire	54m Palfinger WT560
AFI	51m Palfinger WT530
Rapid Platforms	43m Palfinger WT 450
RKP Access Platforms	32m Bronto 34MDT
Warren Access	31m Ruthmann T330
Bella Access	25.3m Ruthmann T275
Smart Platforms	24m Ruthmann T265
Premier Platforms	19m CTE Zed21JH
1 Up Access	19m Gemini 20.35
Lifterz	19m Gemini 20.35
Prolift Access	19m Gemini 20.35

LARGEST BOOM LIFTS								
Company	Height & Model							
Nationwide Platforms	46m JLG 150HAX							
Riwal	46m JLG 150HAX							
Aerial Platform Hire	46m JLG 150HAX							
Easi Uplifts	46m JLG 1500SJ							
AFI	46m JLG 1500SJ							
KDM Hire	41m Genie Z135/70							
Hewden	41m Genie Z135/70							
1 Up Access	41m Genie Z135/70							
PAS	41m Genie Z135/70							
Charles Wilson	41m Genie Z135/70							
Kimberly	41m Genie Z135/70							
TCA Lifting	41m Genie Z135/70							
Manlift Hire	41m JLG 1350SJP							
A-Plant	41m JLG 1350SJP							
Plantfinder	41m JLG 1350SJP							
HSS Hire	41m Haulotte H43TPX							
Loxam	41m Genie Z135/70							
Active Rentals	38m Genie S125							
GPT	38m Genie S125							
GT Access	26m Genie S85							
Southern Cranes & Access	26m Genie S85							
Advanced Access	26m Genie S85							
Premier Platforms	26m JLG 860SJ							
Facelift	24m Haulotte HA260PX							
Lifterz	24m Genie Z80/60							
Hird	24m Genie Z80/60							
Platform Sales & Hire	24m JLG 800AJ							
Brightcast Platforms	24m JLG 800AJ							
2 Cousins	24m JLG 800AJ							
Prolift Access	24m JLG 800AJ							
Horizon Platforms	20m JLG 660SJ							
Bella Access	19.8m Genie S65							
Orion Access	19.8m Genie S65							
Mr Plant Hire	19m Nifty HR21							
Elavation	19m Nifty HR21							
London Tower Service	19m Nifty HR21							
Rapid Platforms	19m Nifty HR21							



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1











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ACCESS continued



Access Hire Nationwide

Vp Hire Station

Charles Wilson

Higher Access

Prolift Access

GT Access

Elavation

AA Access

1 Up Access

Lifterz Premier Platforms

Hird

PAS

Rapid Platforms

Huntley Plant

Platform Sales & Hire

Smart Platform Rental

Advanced Access

Company Nationwide Platforms

Loxam Kimberly

Facelift

A-Plant

top 30

1,576

not disclosed

not disclosed

not disclosed

200

87

78

116

111

20

95 not disclosed

67

130

22

34

18

77

48

55

33

23

1,250



















COMPANY DETAILS & INVESTMENT

10

7

1

10

6

13

2

2

2

3

5

2

2

£23,137,829 26

£7,000,000

£5,379,000

£3,500,000

£3,000,000

£2,984,118

£2,090,000

£1,980,000

£1,780,000

£1,452,000

£1,400,000

£1,300,000

£1,200,000

£1,101,543

£1,100,000

£1,092,000

£1,000,000

£974,000

£768,000

£709,000

£661,282

£593,000

£2,683,143 111

Investment Depots Employees Units Added

850

100

104

16

70

147

215

16

30

13

36

43

20

27

8

20

37

44

10

55

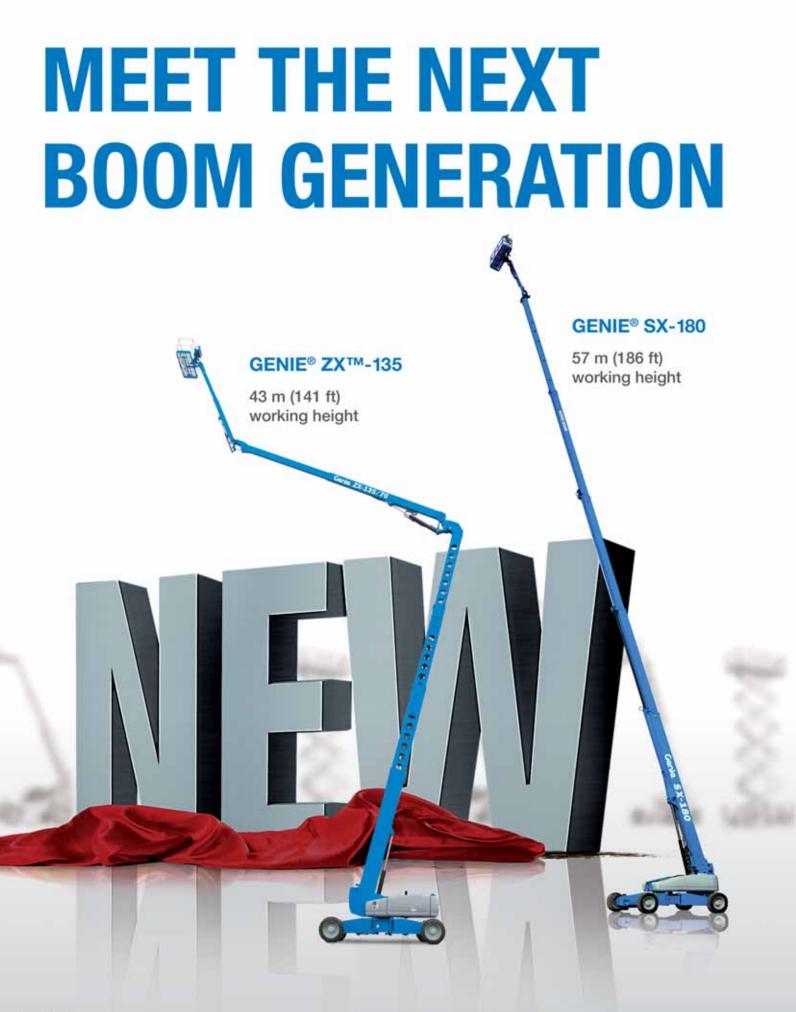
14

17

1,930









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📥 Taking you higher."





Telehandlers

While we continue to struggle with the input from small to medium sized telehandler companies, we have had a far more willing response this year from the larger players. This is still the one area however where we do not manage to achieve our target of having to estimate less than five percent of the chart. If you have a telehandler rental fleet we would very much appreciate hearing from you so that we can add you into next year's survey.

What is notable is that the two large specialists have increased their fleets substantially since last year and that A-Plant has edged ahead of Hewden to become the third largest telehandler rental company in the country while new entrant Morris Leslie of Scotland comes in at number five with a 500 unit fleet.











TOP 30 TELESCOPIC HANDLER COMPANIES

Company	Total Units	Fixed	Largest Fixed	360°	Largest 360°	Compact	Main Brand	Depots	Employees	Investment
Fork Rent	2,250 🔺	1,950	20m	0	n/a	300	JCB	3	69	£37,000,000.00
UK Forks	1,300 🔺	1,130	17m	25	25m	145	JCB	6	100	£3,500,000
A-Plant	1,229 🔺	1,014	17m	0	n/a	215	JCB	111	1,950	£10,029,449
Hewden	1,000 🔻	850	17m	0	n/a	150	CAT	29	850	£1,700,000
Morris Leslie	500 NEW ENTRY	420	17m	0	n/a	80	JCB	9	108	£5,000,000
Charles Wilson	495 🔺	495	18m	0	n/a	0	JCB	13	215	£2,250,000
Hessle	453 🔺	395	18m	18	30m	40	Manitou	4	40	not disclosed
Hawk	289 🔻	280	17m	0	n/a	9	CAT/JCB	6	600	not disclosed
HE Services	270 🔺	250	17m	0	n/a	20	JCB	11	140	£5,350,000
Jarvie Plant	260 🔺	200	20m	20	30m	40	Manitou	6	140	£3,000,000
Plant Hire UK	250 NEW ENTRY	250	20m	0	n/a	0	JCB	1	n/d	not disclosed
Selwood	200 🔻	148	17m	0	n/a	52	Merlo	29	420	not disclosed
GPT	195 🔻	170	17m	25	21m	0	Manitou	10	100	not disclosed
Lynch Plant	226 🔺	184	18m	6	26m	36	JCB	3	465	not disclosed
One Call	207 🔻	162	17m	0	n/a	45	JCB	7	85	£1,000,000
Greenwood Hire	200 🔻	115	10m	75	25m	10	Merlo	4	n/d	not disclosed
ACF	150 NEW ENTRY	150	17m	0	n/a	0	CAT	n/d	n/d	not disclosed
Nixon Hire	136 🔺	124	17m	0	n/a	12	JCB	14	300	£5,000,000
Geoff Huntley	135 🔻	127	17m	2	21m	6	JCB	2	14	£1,671,500
Easi-UpLifts	117 🔻	72	18m	21	30m	24	Manitou	13	145	not disclosed
MJ Hire	100 🔻	85	17m	0	n/a	15	Manitou/JCB	12	150	not disclosed
Emmitt Plant	96 –	78	17m	8	16m	10	JCB	9	25	£925,000