MEWP RENTAL TRENDS



October 11, 2018

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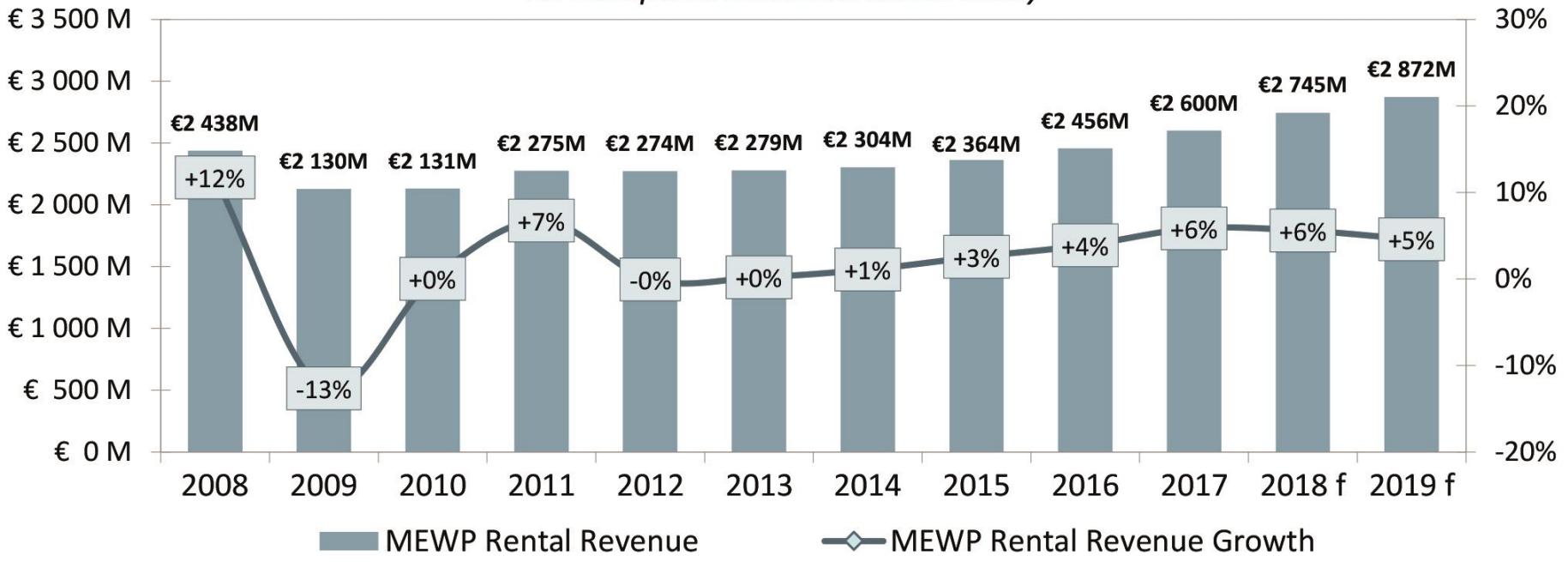
- Rental growth in Europe/North America
- Fleet size analysis
- OEM sales trends

ACQUISITIONS/MERGERS

Buyer	**Acquired**
United Rentals	NES / Neff / BlueLine / BakerCorp
Loxam	Nacanco / Haulotte Italy (Nove) / UK Platforms
TVH	Kohler's MEWP division
Riwal	Adam GmbH / AFI GmbH
Sunbelt	Above and Beyond
Kiloutou	Butsch & Meier / GL Verleih / Elevo / Gam Poland
Accès Industrie	Matelev
Mills & Solaris	*Possible merger*
Ahern Rentals	*Will not acquire*

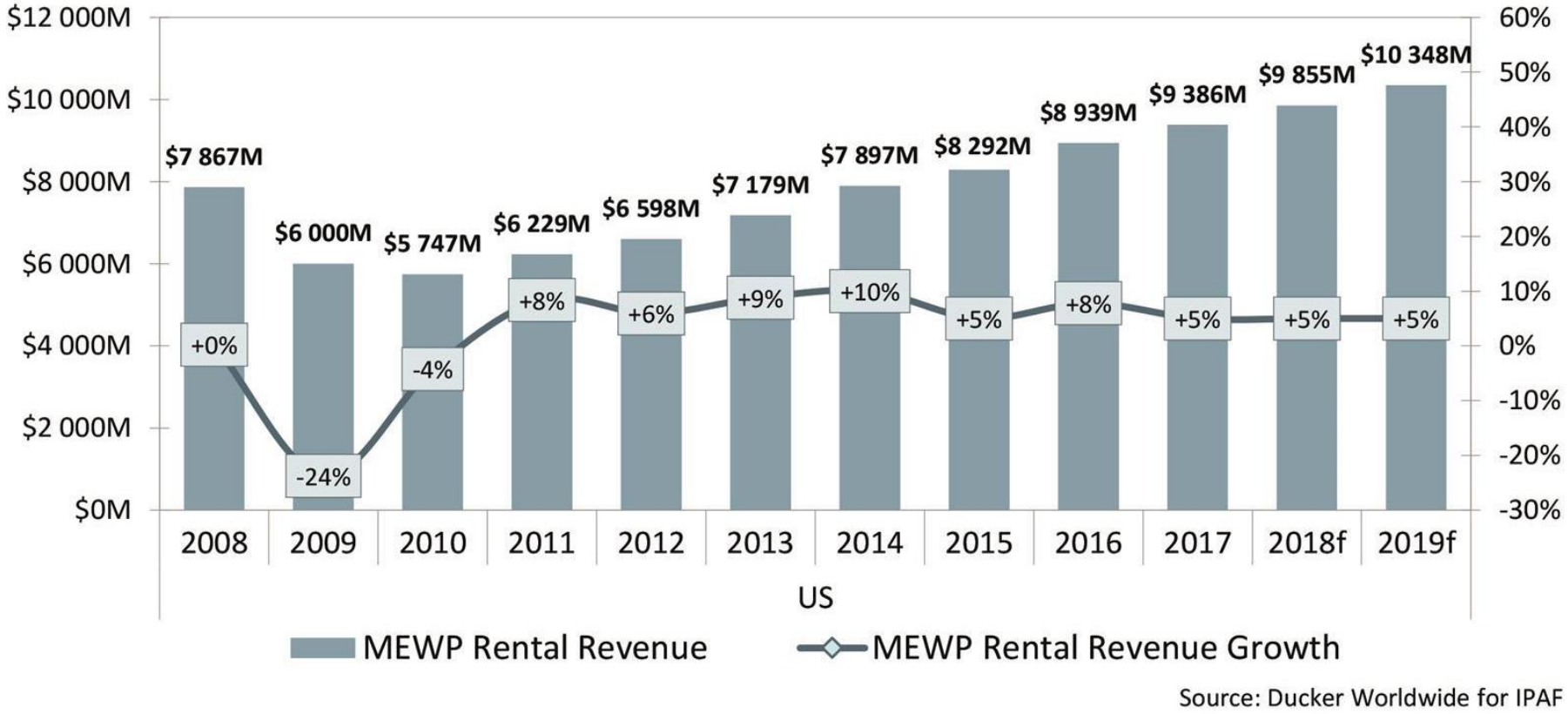
MEWP rental revenue & MEWP rental revenue growth

10 European countries under study



Source: Ducker Worldwide for IPAF

MEWP Rental Revenue & Rental Revenue Growth
USA



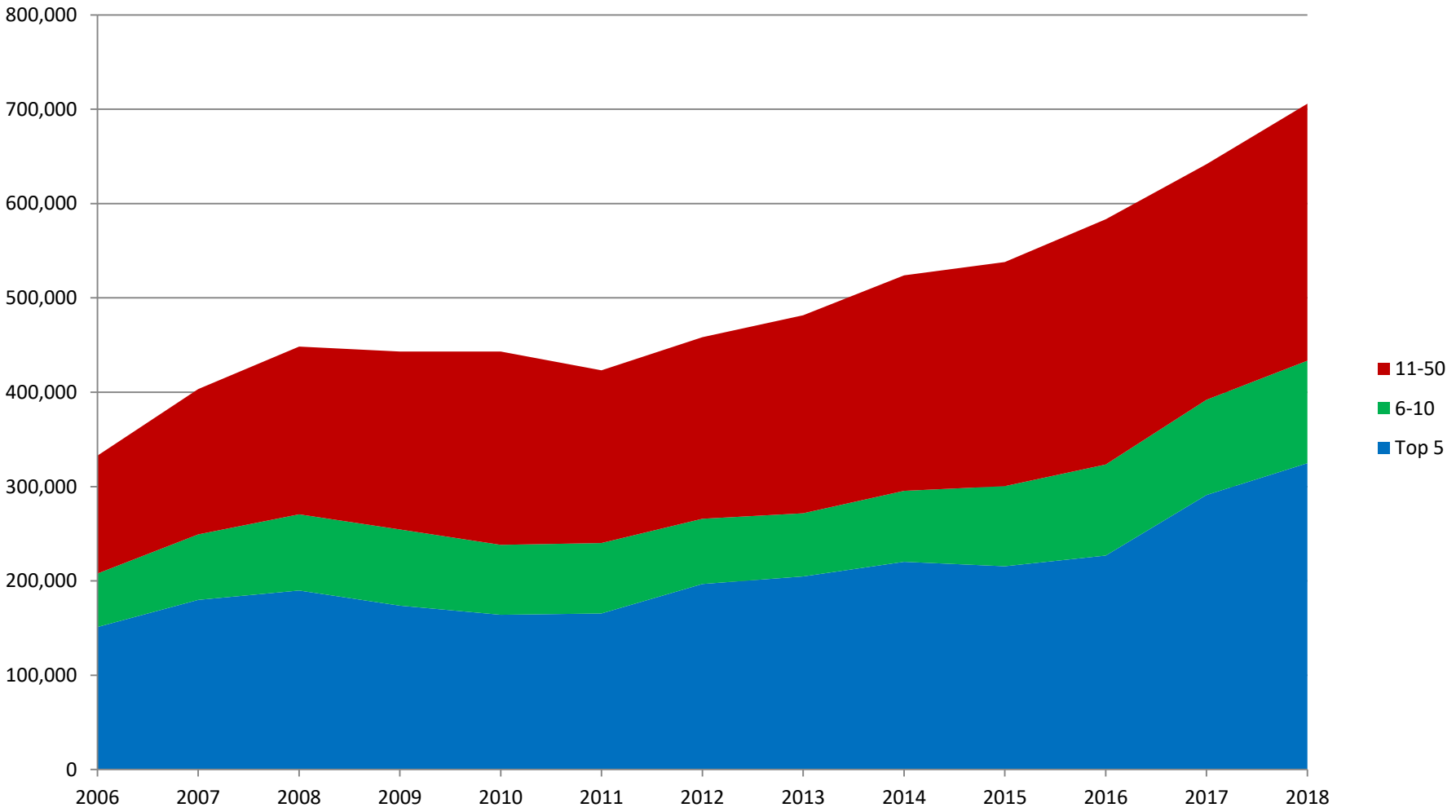
Source: Ducker Worldwide for IPAF

Access50 – August 2018

2018	COMPANY	MEWP FLEET 2018	MEWP FLEET 2017	%	TELEHANDLER FLEET 2018	TELEHANDLER FLEET 2017	%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
1 [1]	**United Rentals** (includes NES Rentals/NEFF Corp)	**129677**	122708	5.7%	**25695**	22481	14.3%	S, B, T	1002	USA, Canada,	USA
2 [2]	**Sunbelt**	**96500**	76500	26.1%	**17250**	14400	19.8%	S,B, M, H	440	USA	USA
3 [3]	**Loxam Group** (includes Lavendon/Hune/Nacanco)	**48250**	44232	9.1%	**6500**	4100	58.5%	S,B,T,M	750	Europe, Middle East, Morroco, Brazil, Columbia	France, UK
4 [4]	**HERC** (est) (Hertz Equipment Rental Co)	**25979**	25222	3%	**5358**	5203	3%	S, B	280	US, Canada, China, Saudi Arabia, UK	USA
5 [6]	**Ahern Rentals**	**24499**	22071	11%	**4587**	5710	-19.7%	S,B	86	USA	USA
6 [5]	**Nikken Corp**	**24194**	22397	8%	**2**	0	-	S, B, T	241	Japan, USA, Southeast Asia, UAE	Japan
7 [7]	**Mateco** (rental business unit of TVH Group)	**22438**	20667	8.6%	**989**	865	14.3%	S,B,T	119	Europe, Malaysia, Mexico	Belgium
8 [8]	**Nishio Rent All** (includes Skyreach Group)	**21479**	20491	4.8%	**140**	133	5.3%	S,B,T,M	386	Japan, Singapore, Southeast Asia, Australia	Japan
9 [9]	**H&E Equipment Services** (est)	**20286**	19320	5%	**2735**	2607	4.9%	S,B,T,H,M	65	USA	USA
10 [10]	**Sunstate Equipment Co LLC**	**20100**	18200	10.4%	**4100**	3700	10.8%	S,B	65	USA	USA
11 [11]	**Aktio Corp** (est)	**18361**	18001	2%	**0**	0	-	S,B,T	650	Japan, Taiwan, Banglades, South East Asia	Japan
12 [12]	**Blue Line Rental**	**18012**	15870	13.5%	**4392**	3360	30.7%	S,B	114	USA, Canada	USA
13 [16]	**SystemLift**	**15678**	12363	26.8%	**1430**	1130	26.5%	S,B,T,M,H	81	Germany, Netherland, Austria, Italy, Swiss, Turkey	Germany
14 [14]	**Riwal**	**15646**	13934	12.3%	**854**	837	2%	S,B,T,M	70	Europe, Middle East, India, Kazakhstan	Netherlands
15 [13]	**Cramo** (est)	**14278**	14278	0%	**488**	488	0%	S,B,T,M,H	412	Europe, inc. Eastern Europe & Russia	Finland

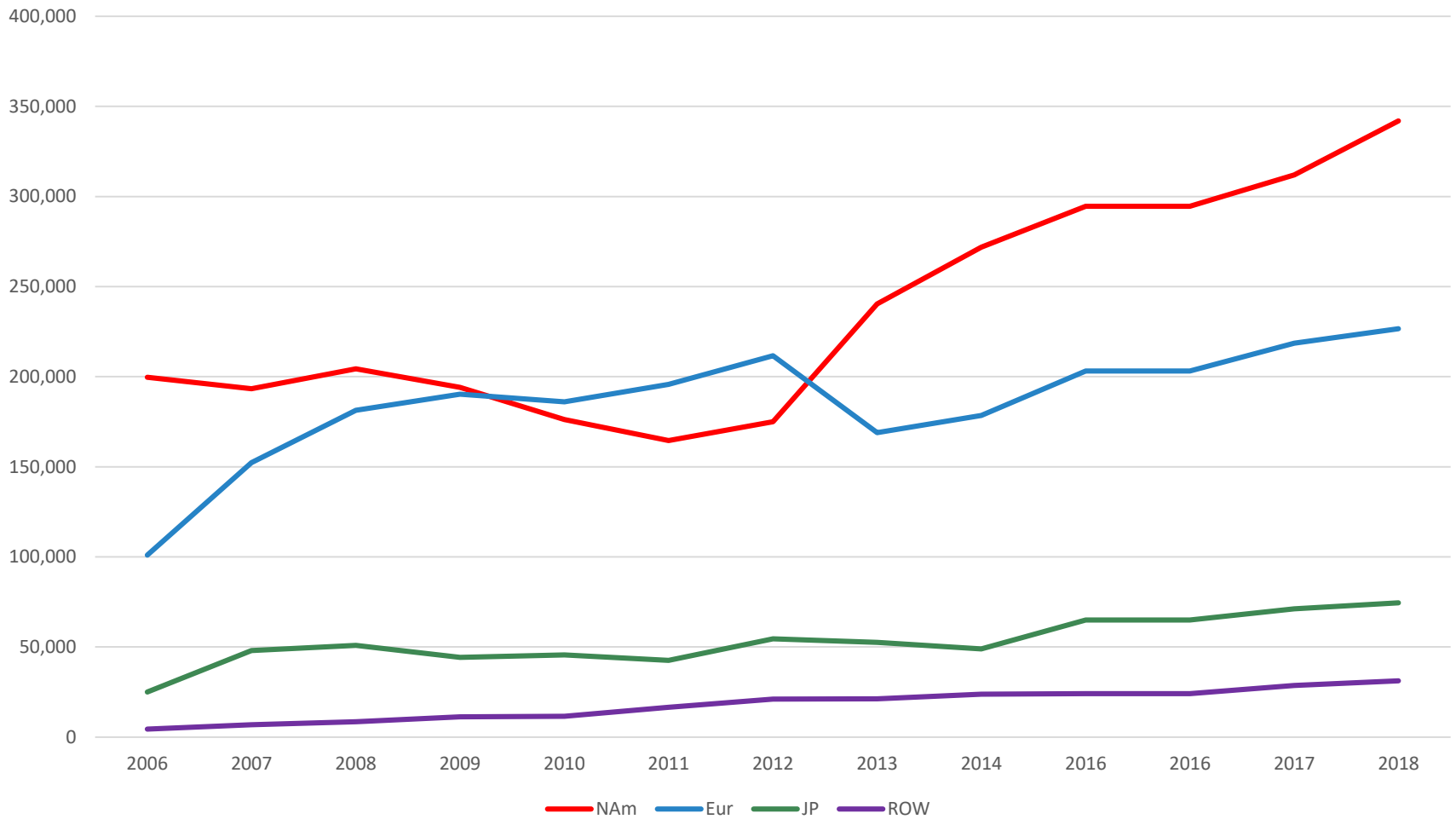
SOURCE: Access International

Access50 MEWP fleet size



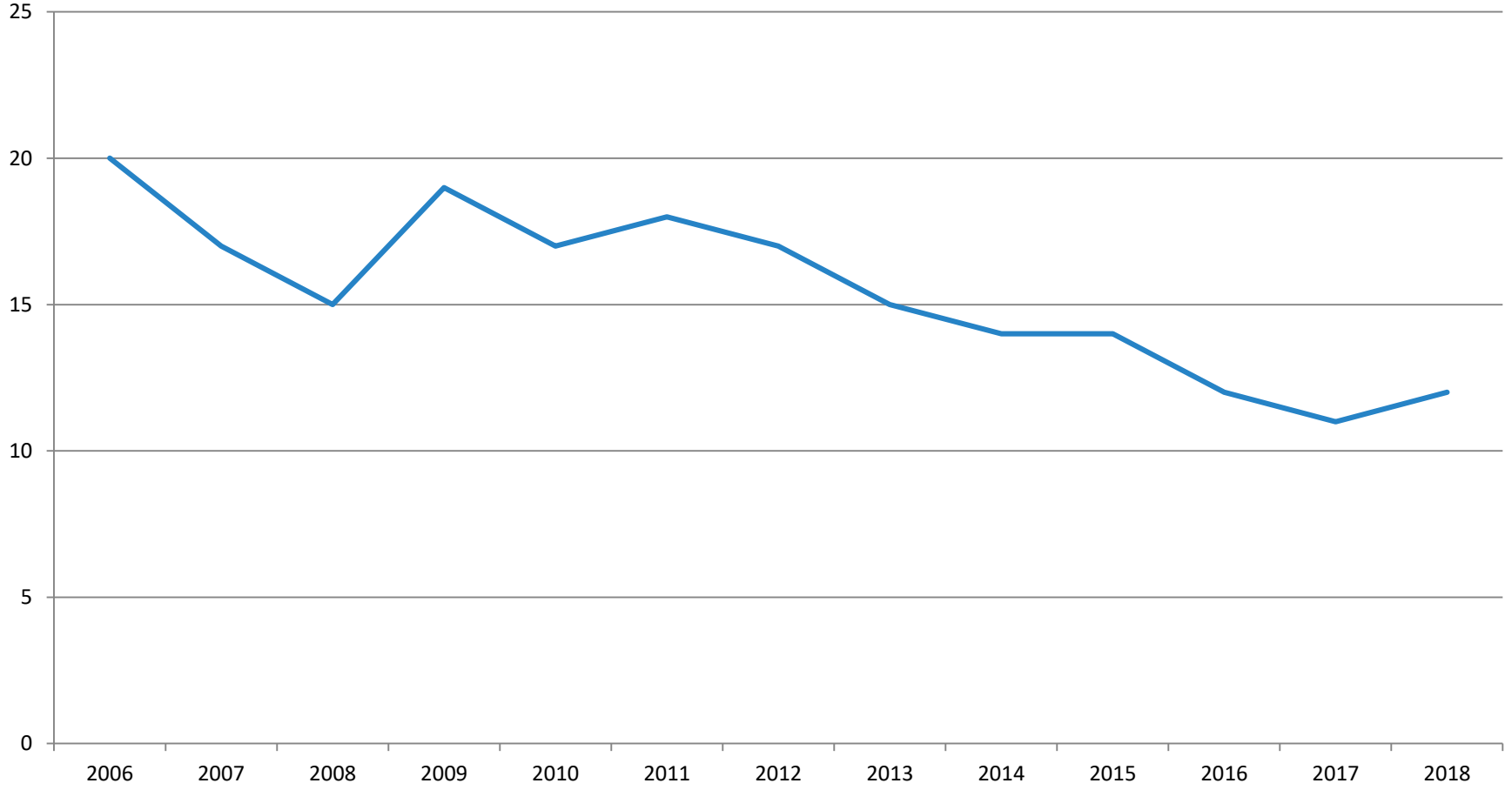
SOURCE: Access International

Access50 fleet size by region



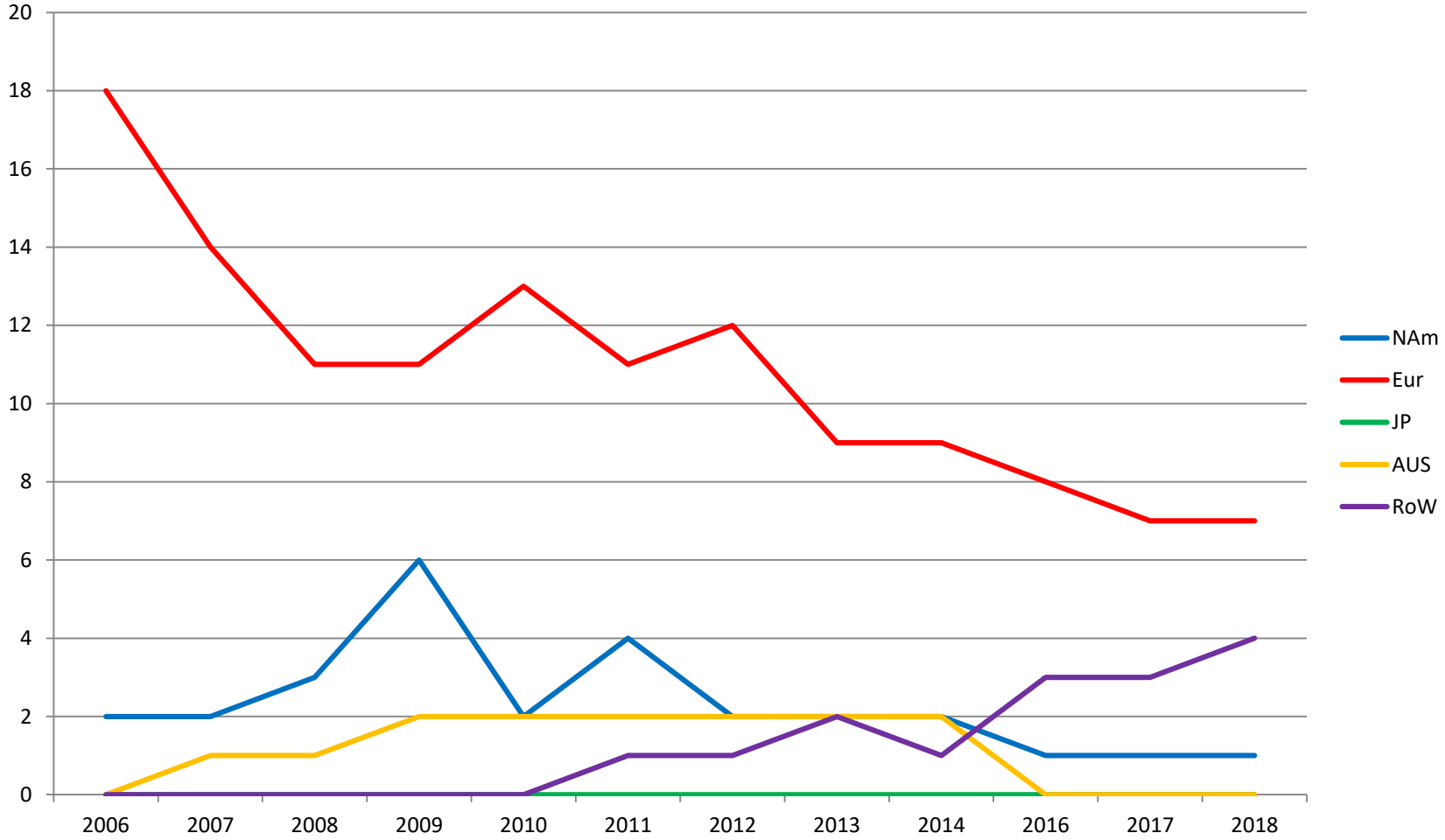
SOURCE: Access International

Access50 specialists



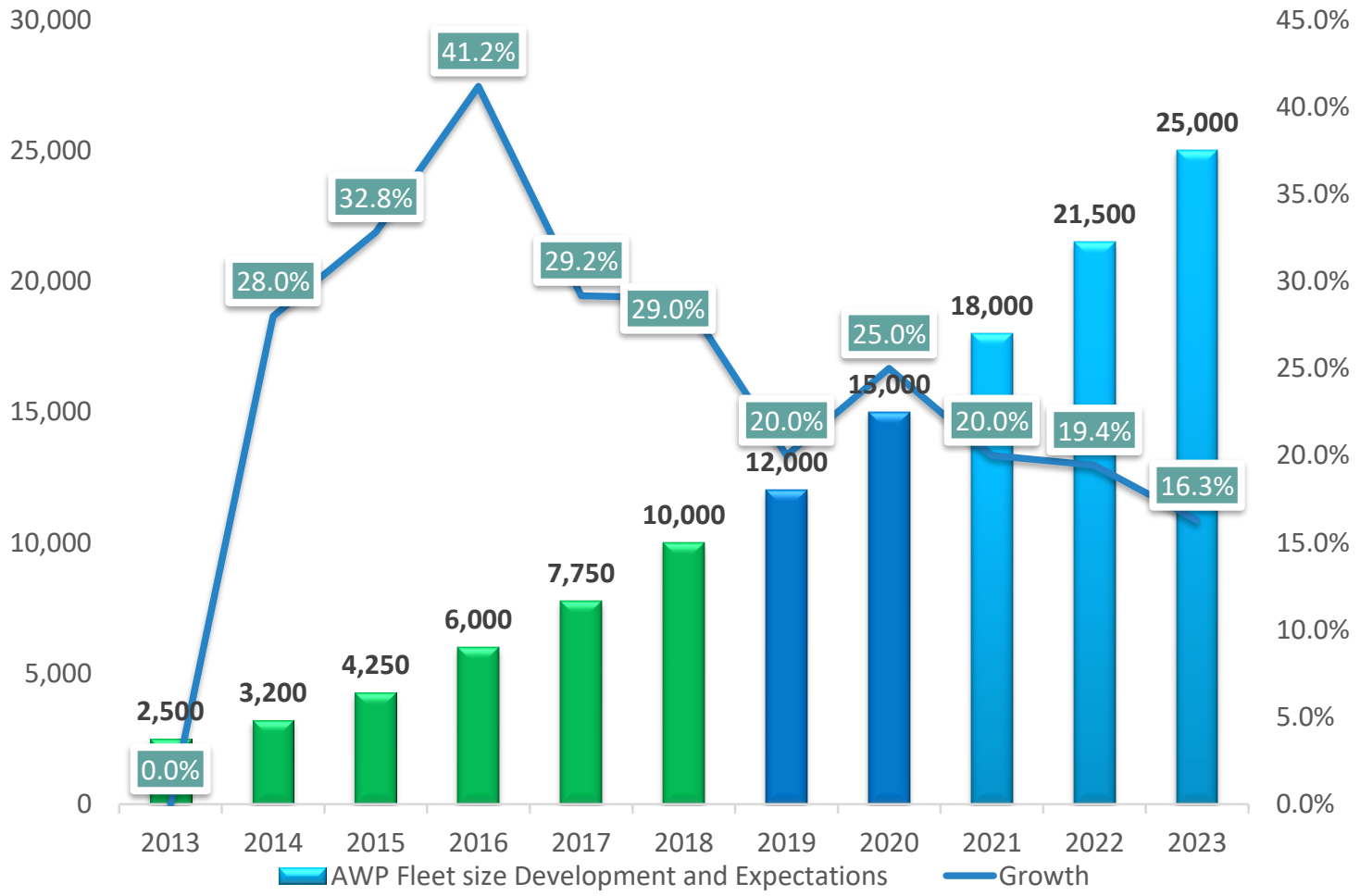
SOURCE: Access International

Access50 specialists by region



SOURCE: Access International

Turkey rental fleet growth

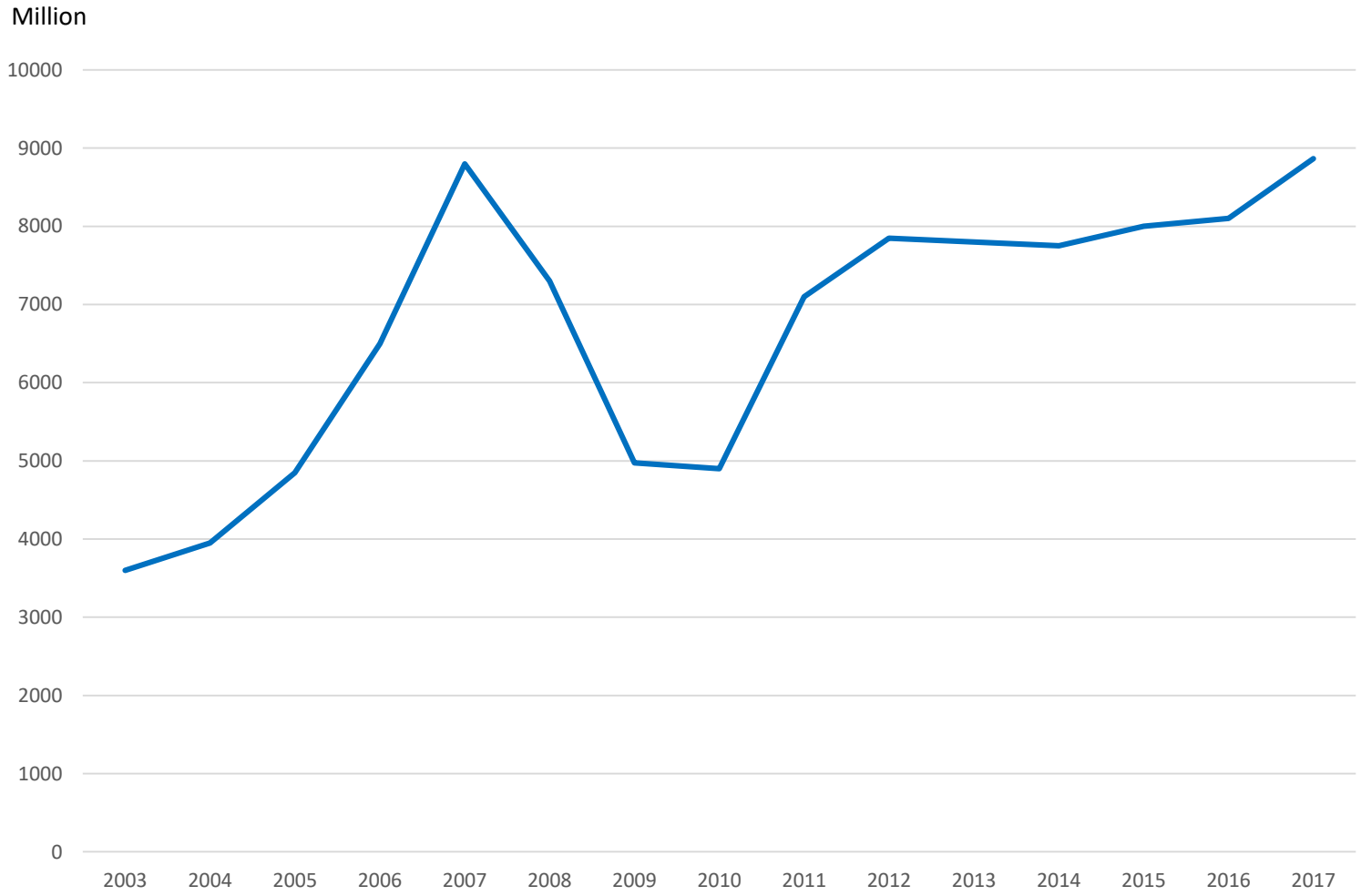


SOURCE: Rent Rise/IPAF

RANK 2017	2016	COMPANY	2017 TURNOVER US$* MILLION	2017 TURNOVER LOCAL CURRENCY MILLION	2016 TURNOVER US$ MILLION	2016 TURNOVER LOCAL CURRENCY MILLION	% CHANGE OVER YEAR
1	1	**JLG Industries**	**2115.7**	$2115.7	1911.1	1911.1	⊕10.7
2	2	**Terex** (Genie & Utility products)	**1693.2**	$1693.2	1748	1748	⊖3.1
3	3	**Skyjack**	**960**EST	CAN €1050EST	777.24EST	850EST	⊕23
4	4	**Haulotte**	**758.28**	€556.33	561.95	€453	⊕2.9
5	6	**Altec**	**436**EST	$436EST	420EST	$420EST	⊕4
6	5	**Aichi Corporation**	**435.1**	JPY 44549	448.33	JPY 46220	⊖2.9
7	14	**Manitou**	**270.1**	€198	184.13	€135	⊕46
8	8	**Tadano**	**239.4**	JPY 24678	225	JPY 23200	⊕6.4
9	7	**Alimak Hek**	**237.2**	SEK 1575.3	205.69	SEK1364 (revised)	⊕15.3
10	10	**Time**	**210**	$210	210	US$210	0
11	11	**Ruthmann**	**207.3**	€152	193.7	€142	⊕7
12	17	**Dingli**	**182.1**	RMB 1139	111.1	RMB 694.7	⊕63.9
13	12	**Palfinger Platforms**	**170.5**EST	€125EST	168.8EST	€123.5EST	⊕0.8
14	16	**Snorkel**	**165.8**	$165.8	118.9	U$118.9	⊕39.4
15	13	**Niftylift**	**146.2**	£87.1	142.5m	84.9m	⊕2.6
16	15	**Bronto Skylift**	**137.3**	€100.7	139.5	€102.4	⊖1.5
17	18	**Multitel Pagliero**	**103.7**	€76	99.29	€72.8	⊕4.4
18	19	**Geda**	**102.9**	€75	89.47	€65.5	⊕15
19	20	**France Élévateur**	**79.1**	€58	79.1	€58	0
20	NEW	**Klubb**	**74**	$74	$59	$59	⊕25

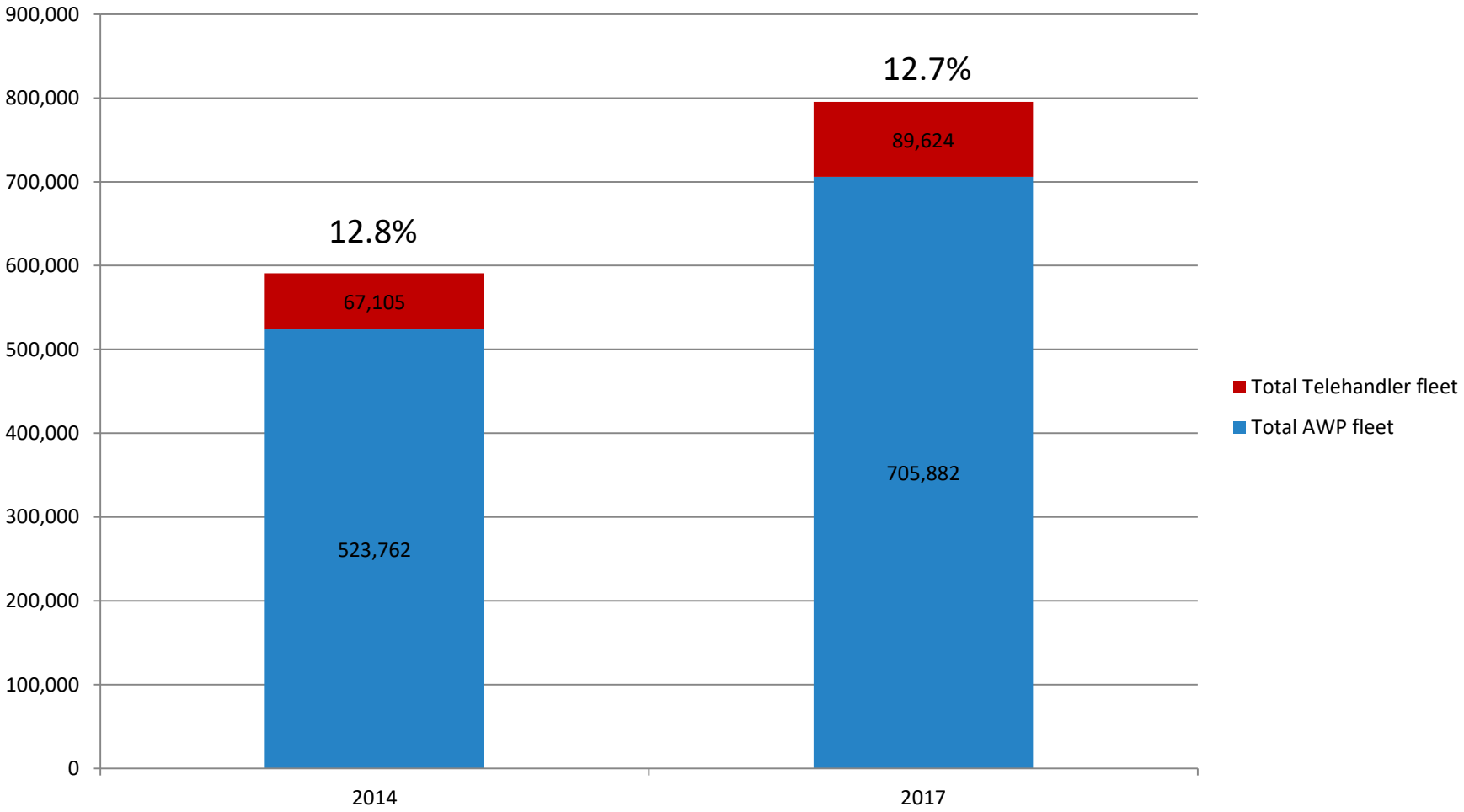
SOURCE: Access International

AccessM20 top 20 manufacturers



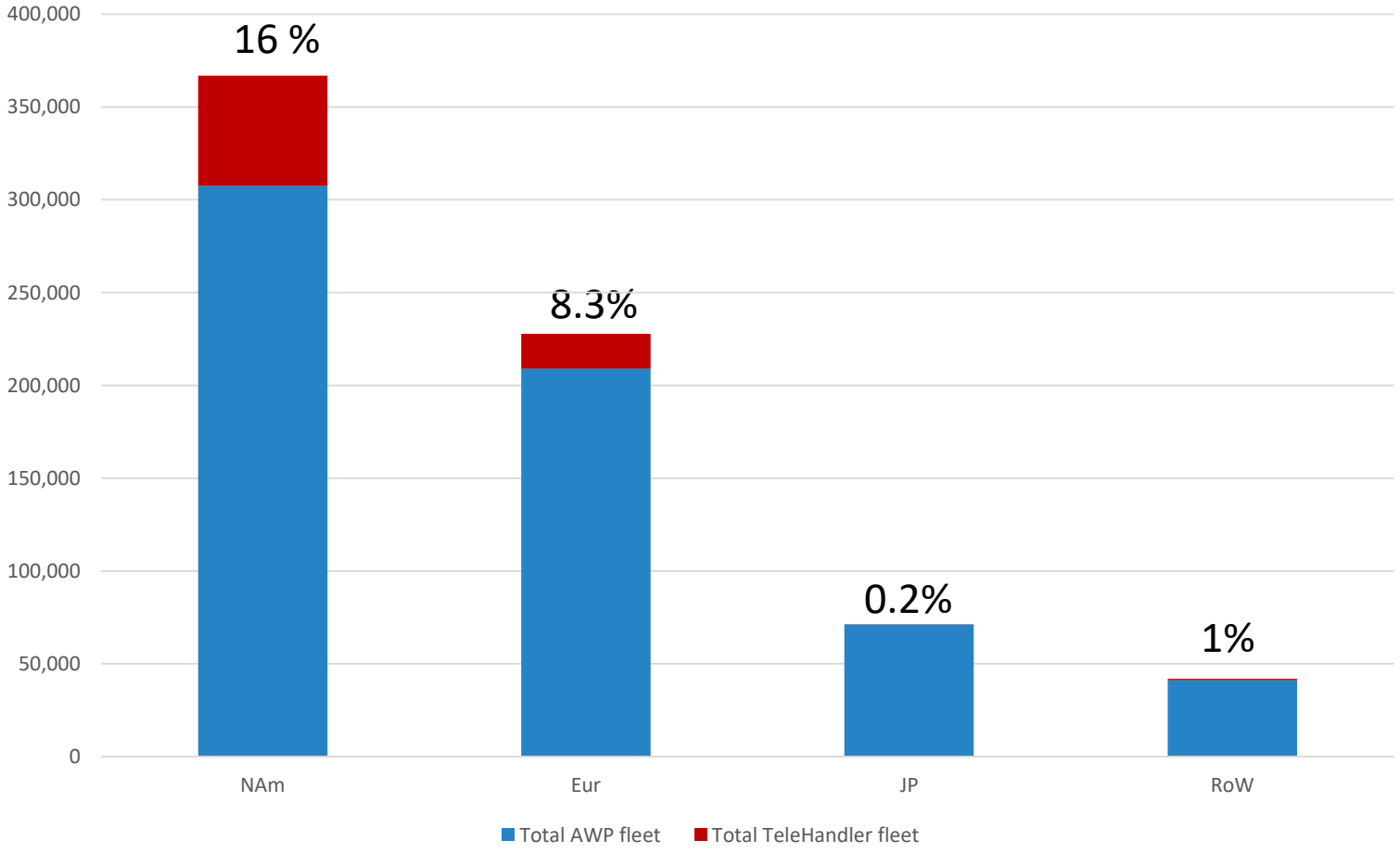
SOURCE: Access International

Access50 telehandler fleet size



SOURCE: Access International

Access50 regional telehandler fleet size



SOURCE: Access International

Thank you

Any questions, contact:

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