



The Journey of Malaysia MEWP Market



Asia Conference 2018
19 July - Kuala Lumpur

Malaysia Daredevils Workers

AERIAL LIFT
& EQUIPMENT



Malaysia Daredevils Workers

AERIAL LIFT
& EQUIPMENT



KANG HAN FEI



Malaysia

Member of  Group



Introduction

1991



1996



2015



2000

Introduction

2016



3 Phases of MEWPs Development



New Emerging Market

- Lack Awareness
- Lack of Machines
- Lack or non existence of Safety Standards



PAST



Established Emerging Market

- Growing Adoption
- Growing Fleet Size
- Safety Pull from Large Contractors or Project Site



PRESENT



Mature Market

- High Adoption
- Right Size Fleet
- Safety Standards



FUTURE

The Past - 1980's to 2008



New Emerging Market

- Lack Awareness
- Lack of Machines
- Lack or non existence of Safety Standards



- MEWPs Introduced
- Limited No. of Machines

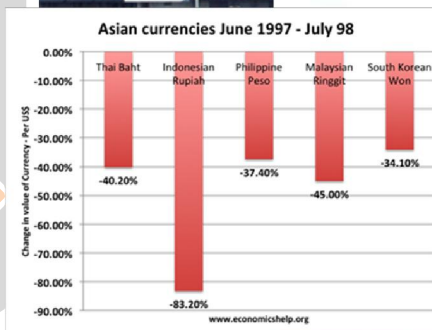
1980s

1990s

- Construction Boom Time
- Asian Financial Crisis

- Y2K
- Recovery
- Stagnant Market

2000



The Past - 1980's to 2008



New Emerging Market

- Lack Awareness
- Lack of Machines
- Lack or non existence of Safety Standards



Scaffolding is the choice of access at heights



Mostly scissors and old machines



Rental Concept not well received by End Users



Strong Presence of Truck Mounted (Skylift)

The Present 2008 - 2018



Established Emerging Market

- Growing Adoption
- Growing Fleet Size
- Safety Pull from Large Contractors or Project Site



Stimulus Package
+ 10th Malaysian Plan
The **Crisis** turn into
Opportunities



The Present 2008 - 2018

MRT and LRT Projects



Established Emerging Market

- Growing Adoption
- Growing Fleet Size
- Safety Pull from Large Contractors or Project Site



PIPC (Pengerang Integrated Petroleum Complex) better known as **RAPID**



The Present 2008 - 2018

Characteristic of Mega Project

Timelines to Complete

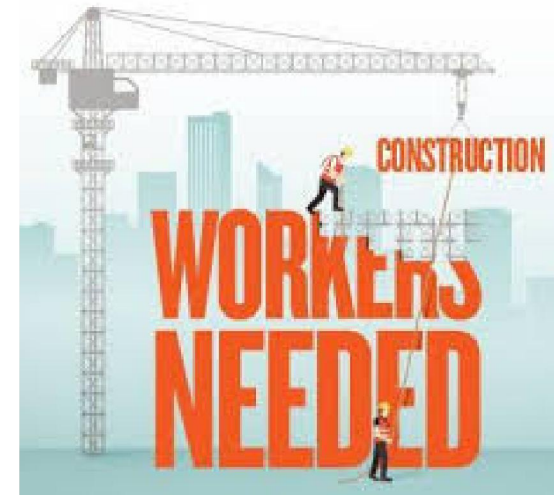


Established Emerging Market

- Growing Adoption
- Growing Fleet Size
- Safety Pull from Large Contractors or Project Site



**Stringent
Safety
Requirement**



Shortage of Labor



Push for the use of MEWPs
**THE MARKET RESPONDED TO
THE DEMAND**

The Present 2008 - 2018



**Enter of Small & Medium
Rental Co.**

**Large Fleet of MEWPs
Available with Affordable
Rental Price**

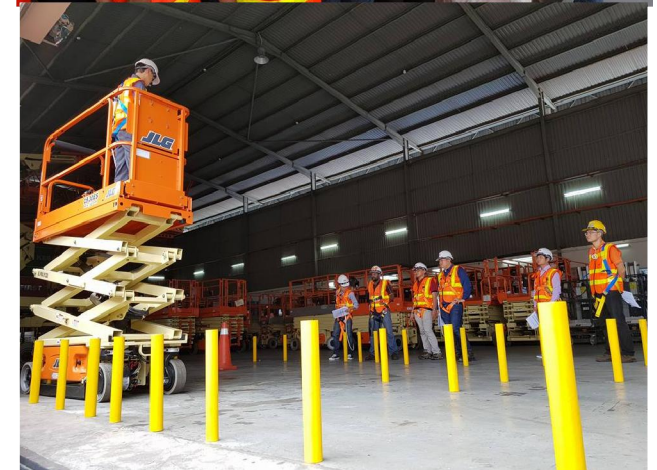


Established Emerging Market

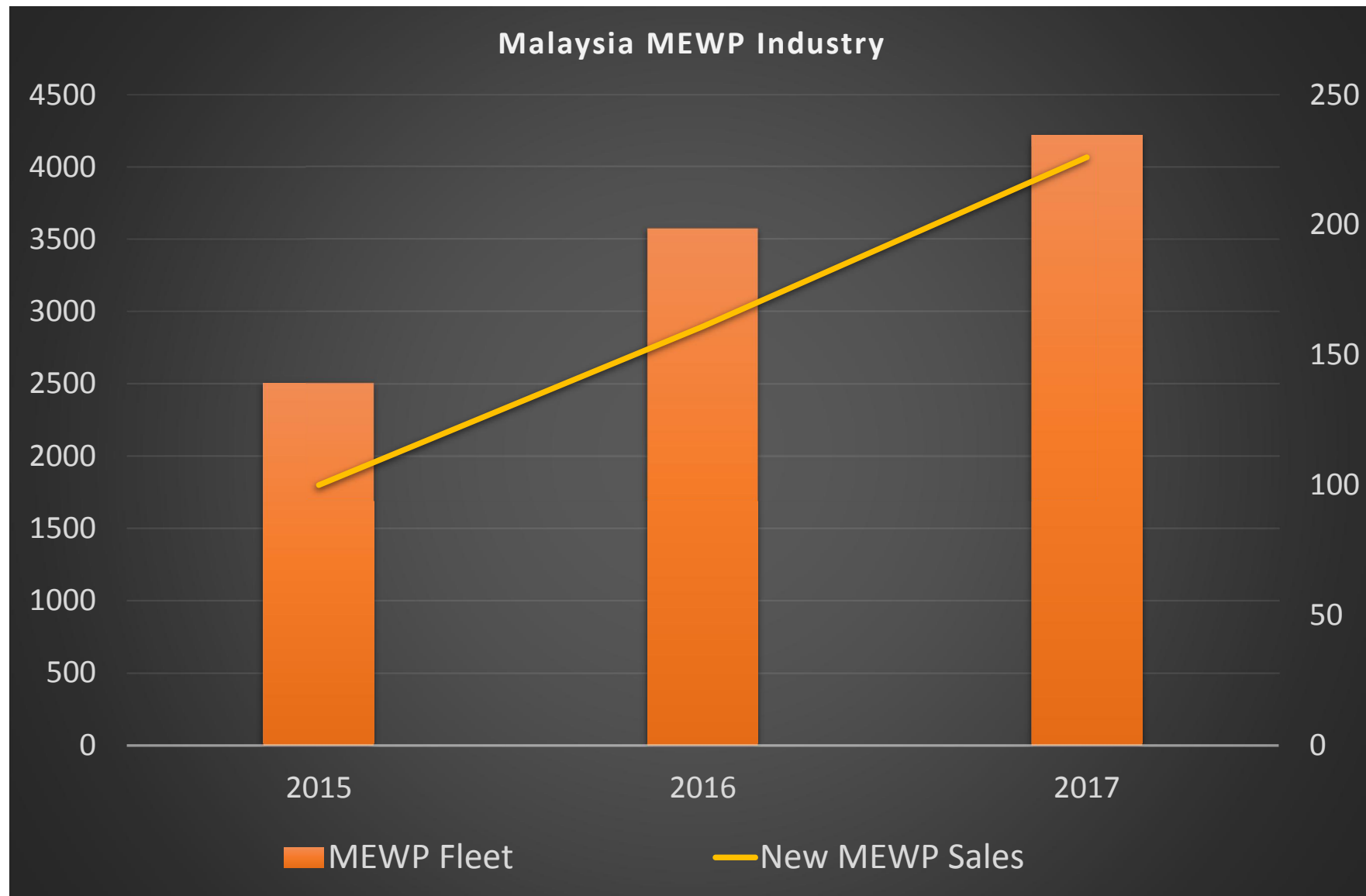
- Growing Adoption
- Growing Fleet Size
- Safety Pull from Large Contractors or Project Site



**More Established &
Professional Rental Co.**
**Safety & Operator Training is
made Available**

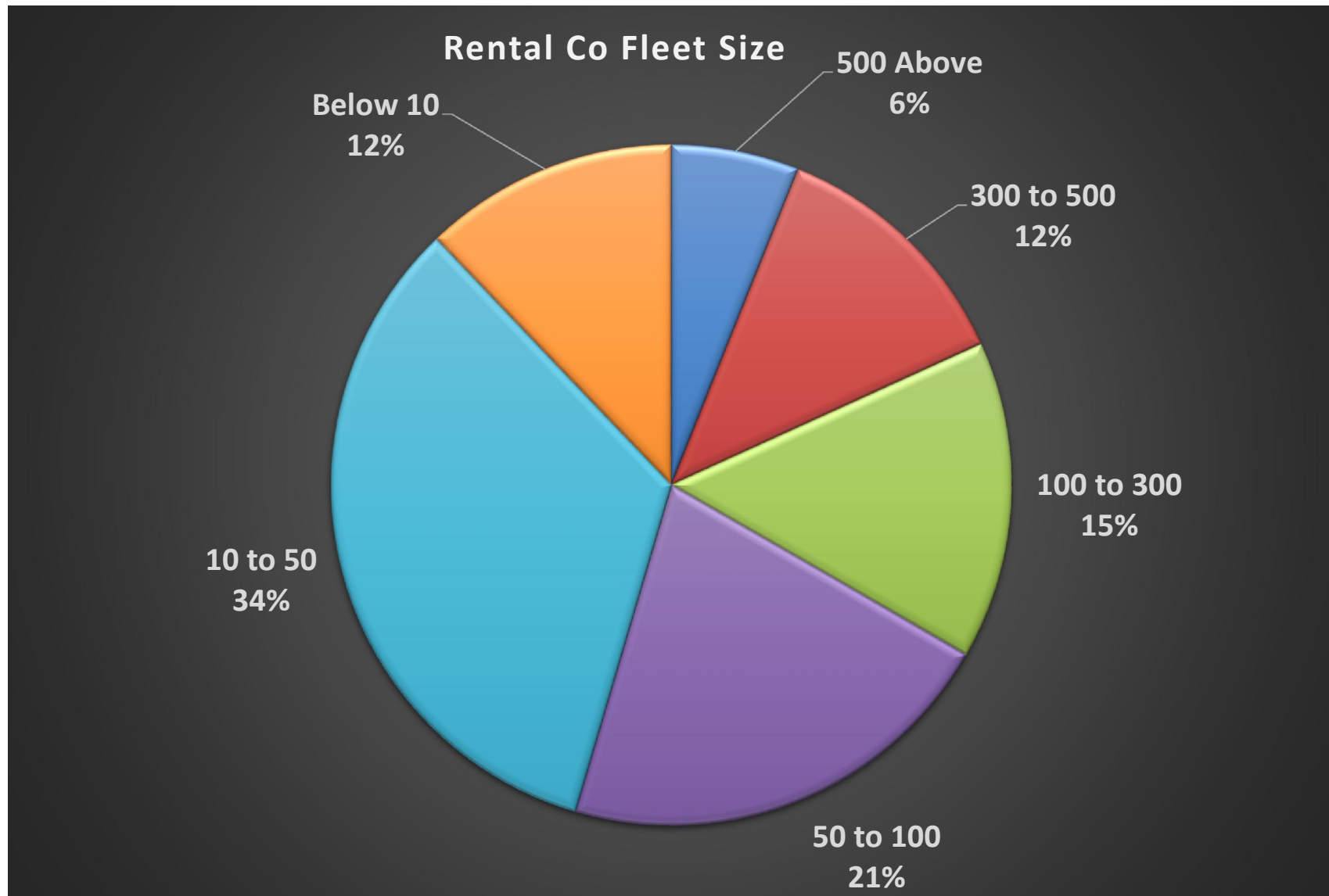


The Present 2000 - 2018



Source: AEM Reports and Local MEWP Rental Fleets Survey on 34 Rental Co; exclude Truck Mount

The Present 2000 - 2018



Source: MEWP Rental Fleets Survey on 34 Rental Co

Development of MEWPs Market



New Emerging Market

- Lack Awareness
- Lack of Machines
- Lack or non existence of Safety Standards

**THE
PAST**



Established Emerging Market

- Growing Adoption
- Growing Fleet Size
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**THE
PRESENT**

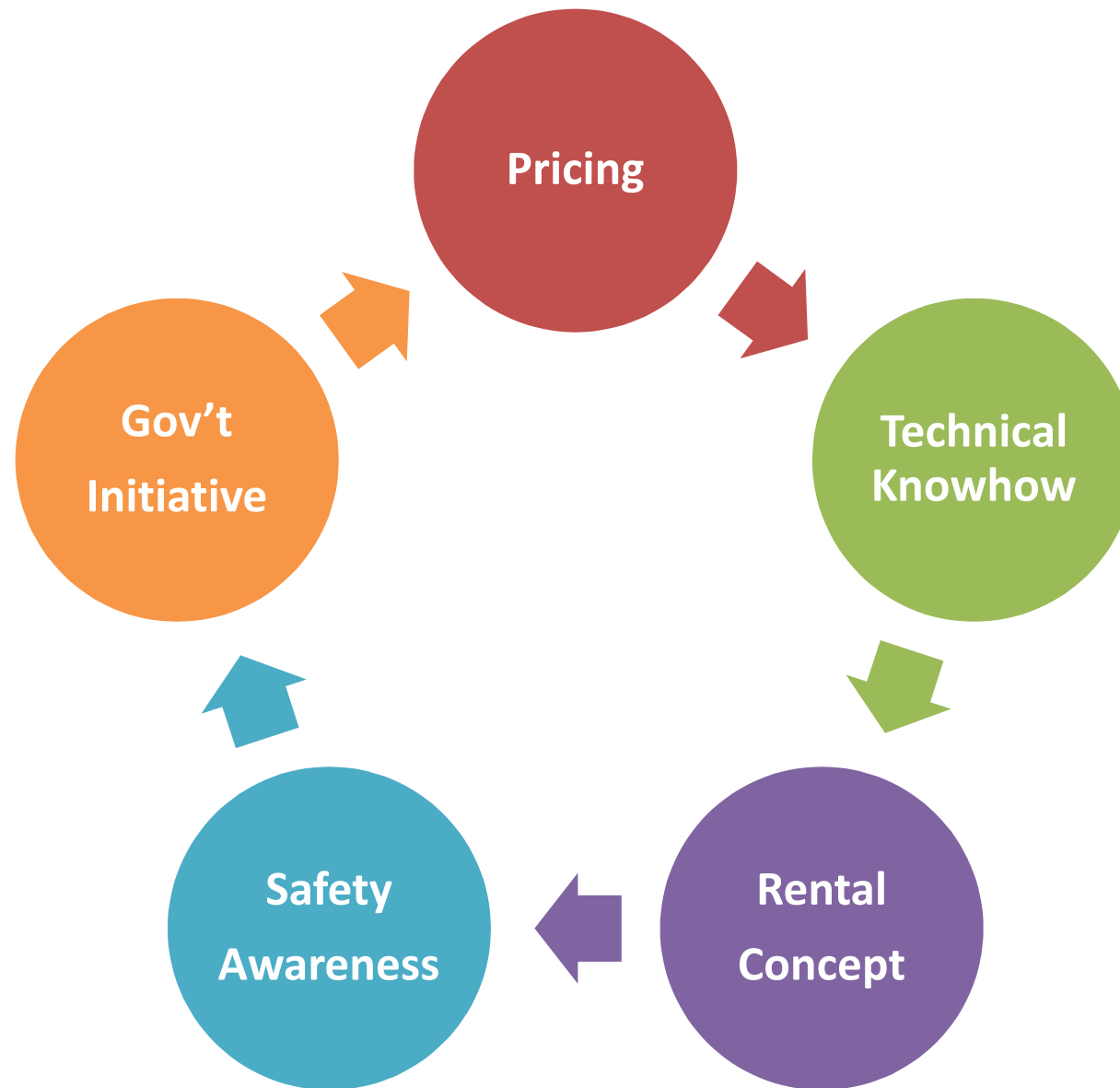


Mature Market

- High Adoption
- Right Size Fleet
- Safety Standards

**THE
FUTURE**

The Challenges Facing



The Future – Looking Forward



STRONGLIFTER

equipinc



**SUPERB
ACCESS**
Global Access Solution



LAIMOVING
Since 1985



EESB

A K T / O



Mature Market

- High Adoption
- Right Size Fleet
- Safety Standards



The Future – Looking Forward

Rental Company
Who Provide ~~Equipment~~

Emphasize
Safety

Believe in
Training

Focus on
Service

Invest in
New
Machine

Create
Differentiation

Service Company 
Who Provide Total Solutions

The Future – Looking Forward

Guidelines for Safe Use of Mobile Elevating Work Platform (MEWP)



March 2018

MBAM launched **Industrial Guidelines for MEWP** with CIDB, JKKP and IPAF



Mega Projects

Will continue to fuel the industry



Mature Market

- High Adoption
- Right Size Fleet
- Safety Standards

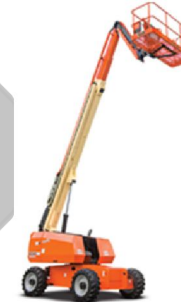


The Future – Looking Forward

No. of Construction Workers @ MEWP

United States
6.6million
Construction
Workers

1 MEWP for
Every 12.5
Workers



Singapore
500,000
Construction
Workers

1 MEWP for
Every 42
Workers



Malaysia
1.2million
Construction
Workers

1 MEWP for
Every 240
Workers



Development of MEWPs Market



New Emerging Market

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**THE
PAST**

1980s - 2008



Established Emerging Market

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**THE
PRESENT**

2008 - 2018



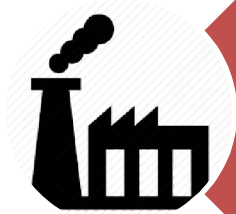
Mature Market

- High Adoption
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**THE
FUTURE**

2018 - 2022

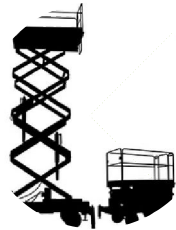
Our Suggestions to the Stakeholders



Manufacturers



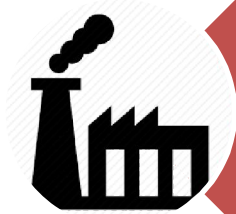
Authority



Rental Companies



Users



Manufacturers

- **Established Manufacturers:**
 - Closer working relationship with the Rental companies. Understand what the market wants
 - Provide good **technical supports** and educate the industry with the **right practices**
- **New Entrants:**
 - MEWP is for Safety and Productivity
 - Understand and Serve the Market Needs
 - Be a Great Maker not a Big Maker chasing for numbers.



Authority

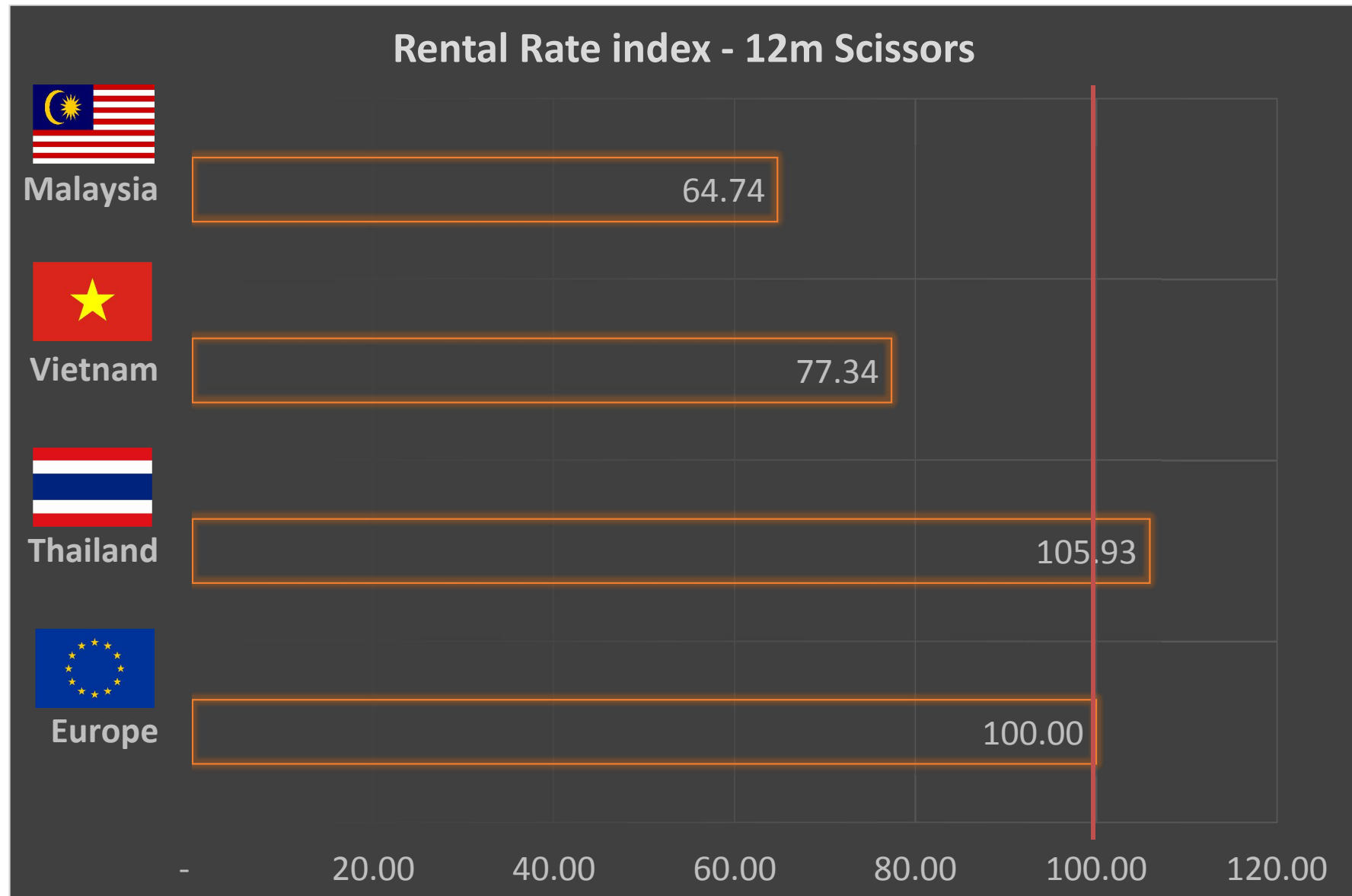
- **Simplify and Centralize** the process in **PMA** renewal
- Promote the **Use of MEWPs**
- Encourage **Operator's Training**
- Stringent **Enforcement** against unsafe practices
- **Educate the Public** about Important of Safety
- **Set Timeline** for the development of MEWPs



Rental Companies

- Rental is a **matrix of decisions** – Understand the essence of Rental – TCO, Time Utilisation, Fleet Mix....
- **Choose and understand your market** – it helps you to have the right mix of machines
- **Create Your Own Market** and Be Different
- Invest in **Service & Training**
- **Beware of Maintenance**, get rid of very old machines – they are your liabilities to operations and financials.
- **Understand your costing** – Profit keeps your business growing. Understand your costing will avoid enter Price War

Our Suggestions to the Stakeholders



Our Suggestions to the Stakeholders



Rental Companies

- **Create Your Market** and Be Difference.



Our Suggestions to the Stakeholders



Users

- Choose the **Right** Rental **Companies**
 - Do not make choice based on price alone

Our Suggestions to the Stakeholders

BUNGY JUMP
\$2,800
Per Jump

Sure! The finer the rope, the cheaper! We have rope of \$500 and \$1,000. I can even do it for **free** if without rope! **Deal?**



Its Expensive.
Can it Be
Cheaper?

**Respect
the Price
when
Seeking
for Quality**

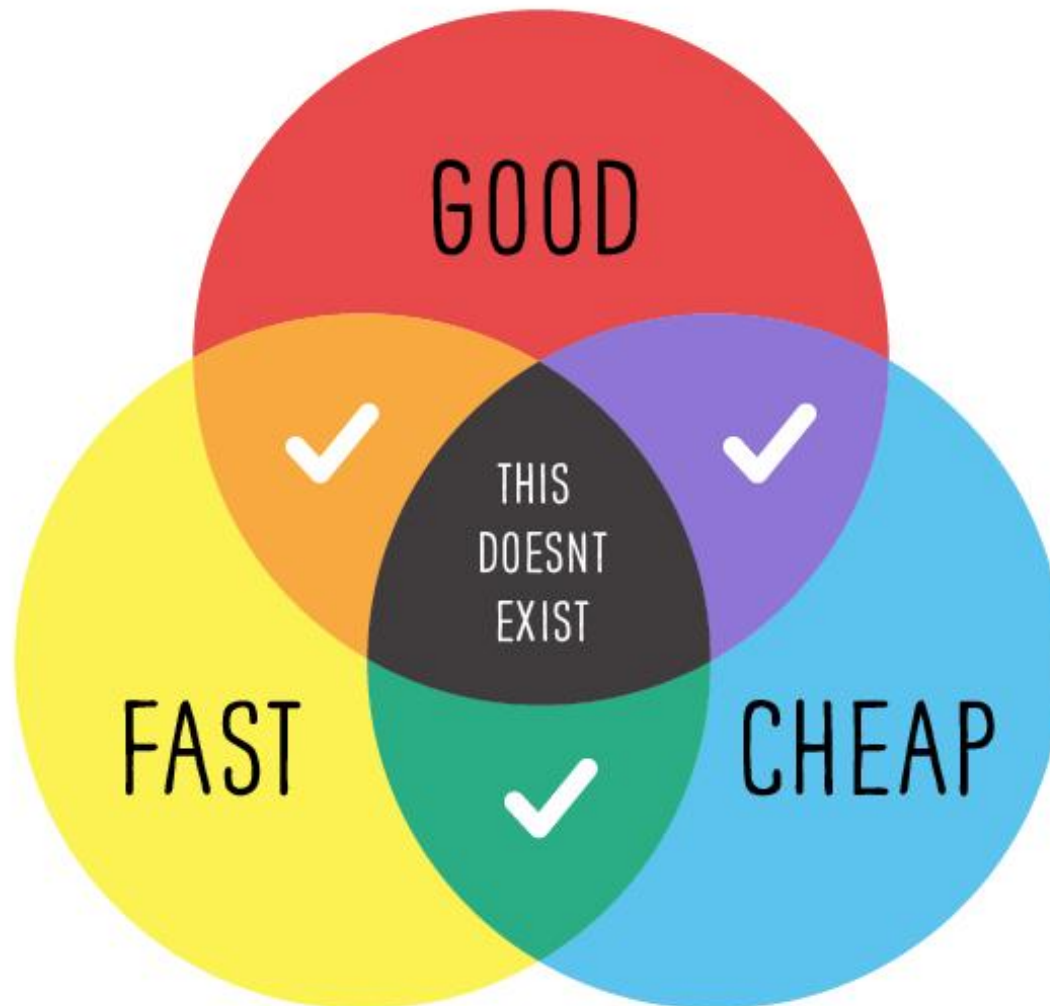
OK.... I will
have the
\$5,000 rope....



Users

- Choose the **Right** Rental **Companies**
 - Do not make choice based on price alone
 - Give time to Rental co to prepare their machines thru forecast. Fast won't be cheap, and definitely won't be good.

Our Suggestions to the Stakeholders



REALITY CHECK

THERE ARE 3 KINDS OF SERVICE
GOOD - CHEAP - FAST
BUT YOU CAN PICK ONLY TWO

GOOD & CHEAP WON'T BE **FAST**
FAST & GOOD WON'T BE **CHEAP**
CHEAP & FAST WON'T BE **GOOD**

Our Suggestions to the Stakeholders



Users

- Choose the **Right** Rental **Companies**
 - Do not make choice based on price alone
 - Give time to Rental co to prepare their machines thru forecast. Fast won't be cheap, and definitely won't be good.
 - Reject & Report any Unsafe Machines & Practices
- Ensure **Competency** of your **Operators** thru **Training**
- And More importantly....
- **Pay Your Suppliers Promptly** 😊



Our Suggestions to the Stakeholders

THINK
SAFETY IS
EVERYBODY'S
BUSINESS

Revised Product # 2246 Rev 1 (02/04/2014) - 1.000.000.000



