中国高空作业平台
2014～2016租赁商规模状况调查报告

Interim Scale Investigation Report on Lift Equipment Rental Suppliers in China from 2014 to 2016

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一、背景 Background

- 由于近年来，受宏观经济增速回落、固定资产投资持续放缓的影响，从2009年~2014年中国工程机械行业销售收入年增长率从 +40%下降到 -10%。在这样下滑的市场环境下，高空作业平台却连年保持在50%以上的年平均增长率，成为本建机制造行业的一枝独秀，引人注目。高空作业平台租赁市场呈高速发展态势，为此在租赁行业管理上也带来了跟不上“高发展”的诸多问题。
- Influenced by the slowdown of macroeconomic growth and Investment in fixed assets, the annual sales revenue growth rate of construction & engineering machinery industry in China has dropped from +40% in 2009 to -10% in 2014.

  However, even under such shrinking environment, the annual growth rate of lift equipment industry （manufacture） has remained above +50% for years, which makes lift equipment industry stand alone and attractive.

  As the rental market of lift equipment in China is now on fast track, many problems related to management have occurred while trying to keep pace with the rapid development.

二、调查范围 Scope of Investigation

- 在这样高速发展的背景下，我“中国建筑业协会机械管理与租赁分会”按市场反映和企业需求，自2016年3月开始对高空作业平台的租赁商开展全国性调查（至今尚未结束）。其调查范围为：

  Under this rapid development, China Construction Industry Association (CCIA)machinery management and rental branch has began an nationwide investigation on all rental suppliers of lift equipment throughout China due to market reaction and enterprise needs. (the investigation is still in progress)
  Here's the scope of investigation:

  1. 全中国除港澳台以外的地区

     All areas in China except Hong Kong, Macao and Taiwan.
  2. 未能在黑龙江、广西、新疆、西藏采集到租赁商信息

     Fail to collect any data on rental suppliers in the 4 areas: Heilongjiang, Guangxi, Xinjiang and Tibet
  3. （本报告）以下数据来自27个省的243家租赁商

     The data in this report are collected from 243 rental suppliers throughout 27 provinces in China
  4. 共找到的租赁商有430家，其中187家未能采集到数据

     No other data but company name is collected for 187 suppliers among the total of 430 suppliers
  5. 调查重点是租赁商规模（企业户数、台套、产值）

     Scale is the key of this investigation (number of suppliers, the amount of equipment, rental output value)
  6. 采集数据时间段为：2014～2016年的三年

     The period for the data collection is 3 years from 2014 to 2016

三、调查内容 INVESTIGATION CONTENT

（一）高空作业平台租赁商户数 the number of lift equipment rental suppliers

至2016年底已采集到三年数据齐全的租赁商户数为243户

By the end of 2016, the number of the suppliers with 3 years’ full data collected is 243.

1. 租赁商大于10户的地区14个（见图1） the 14 areas with over 10 suppliers (Chart 1)

图1：2016年地区高空作业平台租赁商户数排序（第1～第14）

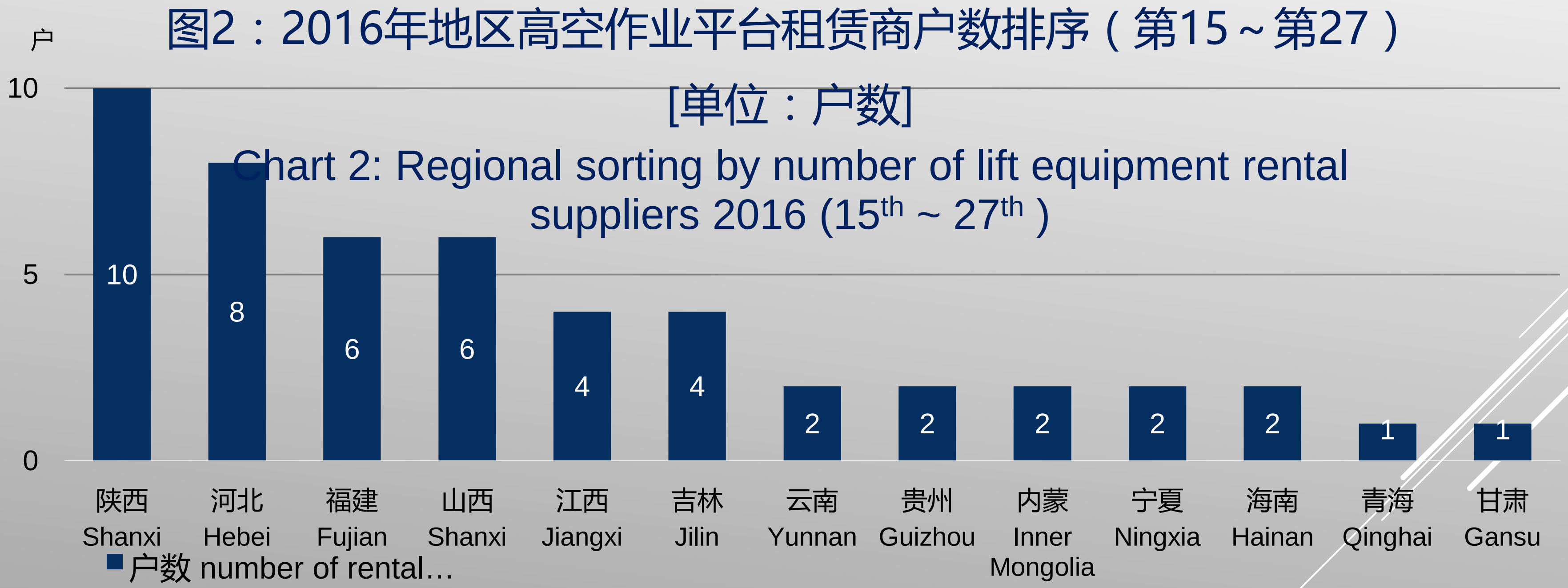
[单位：户数]

Chart 1: Regional sorting by number of lift equipment rental suppliers 2016 (1st ~ 14th)

注1：上海为高空作业平台租赁商的发源地，租赁商户数量远远领先全国其他地区。占全国总数的42%。

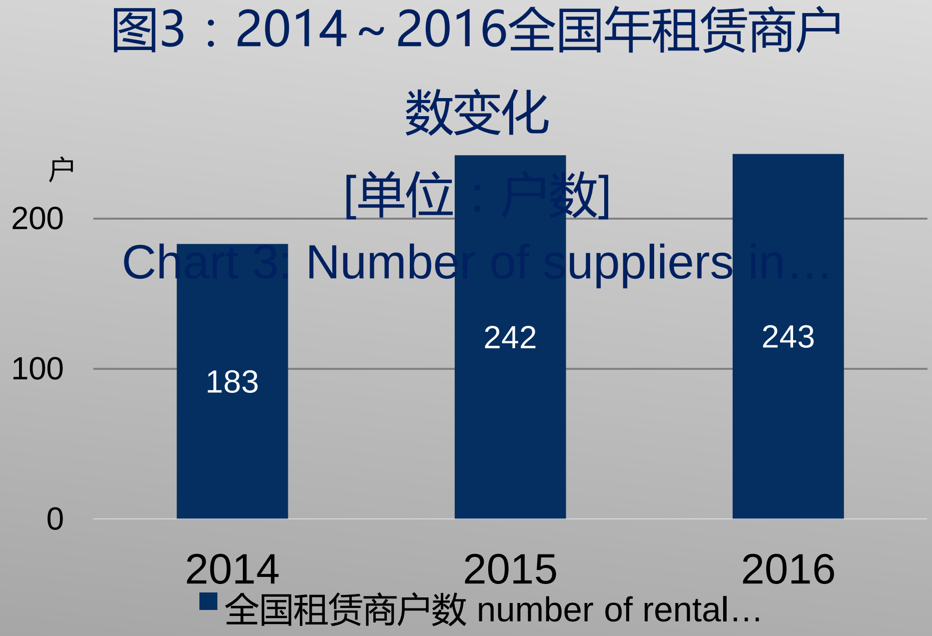
Remark 1: As the cradle of lift equipment rental supplier, Shanghai has much more suppliers than any other area in China and accounts for 42%.

2. 租赁商≤10户的地区13个（见图2） the 13 areas with less than 10 suppliers (Chart 2)



3. 近三年高空作业平台租赁商户数的增速：在430家总户数中，对其中三年数据齐全的243户租赁商进行户数增速反映（见图3）

the growth rate of suppliers number from the 243 suppliers with data fully collected (Chart 3)



注1：2015年户数年增长量为32%。

注2：2016年户数增长1户，趋于稳定。

Remark 1: the growth rate of 2015 is 32%.

Remark 2: the growth of 2016 is only 1, which tends to be stable.

（二）高空作业平台设备拥有量 amount of lift equipment possessed

至2016年底，在已采集三年数据齐全的243户的设备拥有量为42000多台套。

By the end of 2016, the total amount of lift equipment possessed by all the 243 suppliers above 42000.

1. 设备拥有量超过1000台套的地区有10个（见图4）

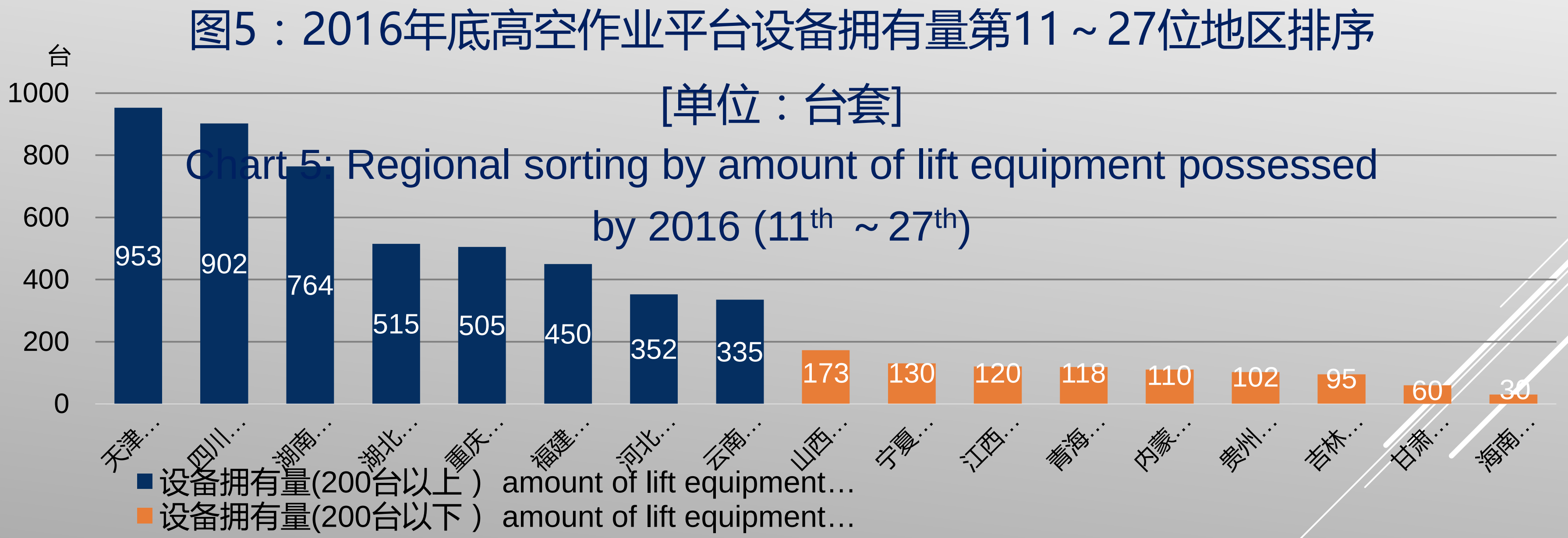
the 10 areas with more than 1000 equipment possessed (Chart 4)

注1：上海地区的台套数是排序第2广东地区的5.84倍。

Remark 1: Shanghai's equipment amount is 5.84 times of Guangdong (2nd rank).

2. 设备拥有量小于1000台套的17个地区（见图5）

the 17 areas with less than 1000 equipment possessed (Chart 5)



注1：橙色柱图的9个地区拥有量低于200台，处于刚出生时期。

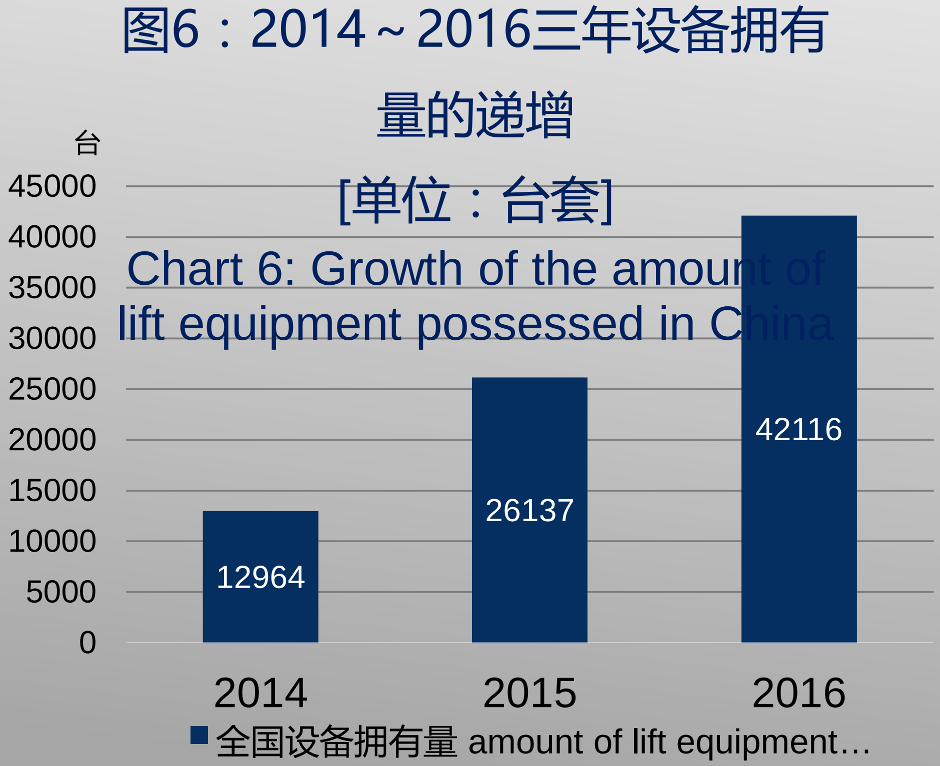
注2：蓝色柱图的8个地区拥有量在300～1000台，仍属起步阶段。

Remark 1: the 9 areas in **orange block** possesses less than 200 equipment, which are at birth stage.

Remark 2: the 8 areas in **blue block** possesses 300～1000 equipment, which are also at their beginning.

3. 近三年设备拥有量的增速（见图6）

the growth rate of lift equipment amount from 2014 to 2016 (Chart 6)



注1：2015年设备拥有量年增长13173台套，年增长率为102%。

注2：2016年设备拥有量年增长15979台套，年增长率为69%。

注3：2016年的设备拥有量是2014年的3.25倍。

Remark 1: the growth of 2015 is 13173 sets at growth rate 102%.

Remark 2: the growth of 2016 is 15979 sets at growth rate 69%.

Remark 3: the equipment number of 2016 is 3.25 times of 2014.

4. 设备拥有量前12位地区近三年台套数量的递增（见图7）

the growth of the top 12 areas with the biggest amount of equipment (Chart 7)

增长率 growth rate	上海 Shanghai											
2015增长率 2015 growth rate	76%	85%	289%	55%	182%	203%	163%	147%	145%	79%	182%	106%
2016增长率 2016 growth rate	46%	45%	79%	60%	93%	78%	242%	79%	73%	59%	96%	77%
2年增长率 2 year growth rate	156%	169%	596%	149%	442%	438%	800%	343%	325%	185%	451%	264%

从图7中的数据得出：
The following are concluded from Chart 7:

① 前12位地区的2015年设备拥有量增量为：11713台，年增长率为：
2015’s growth of the total amount of lift equipment possessed by the top 12 areas in China is 11713 sets, and the growth rate is:

$$\frac{24137 - 12424}{12424} = 94.3\%$$

② 前12位地区的2016年设备拥有量增量为：14120台，年增长率为：
2016’s growth of the total amount of lift equipment possessed by the top 12 areas in China is 14120sets, and the growth rate is:

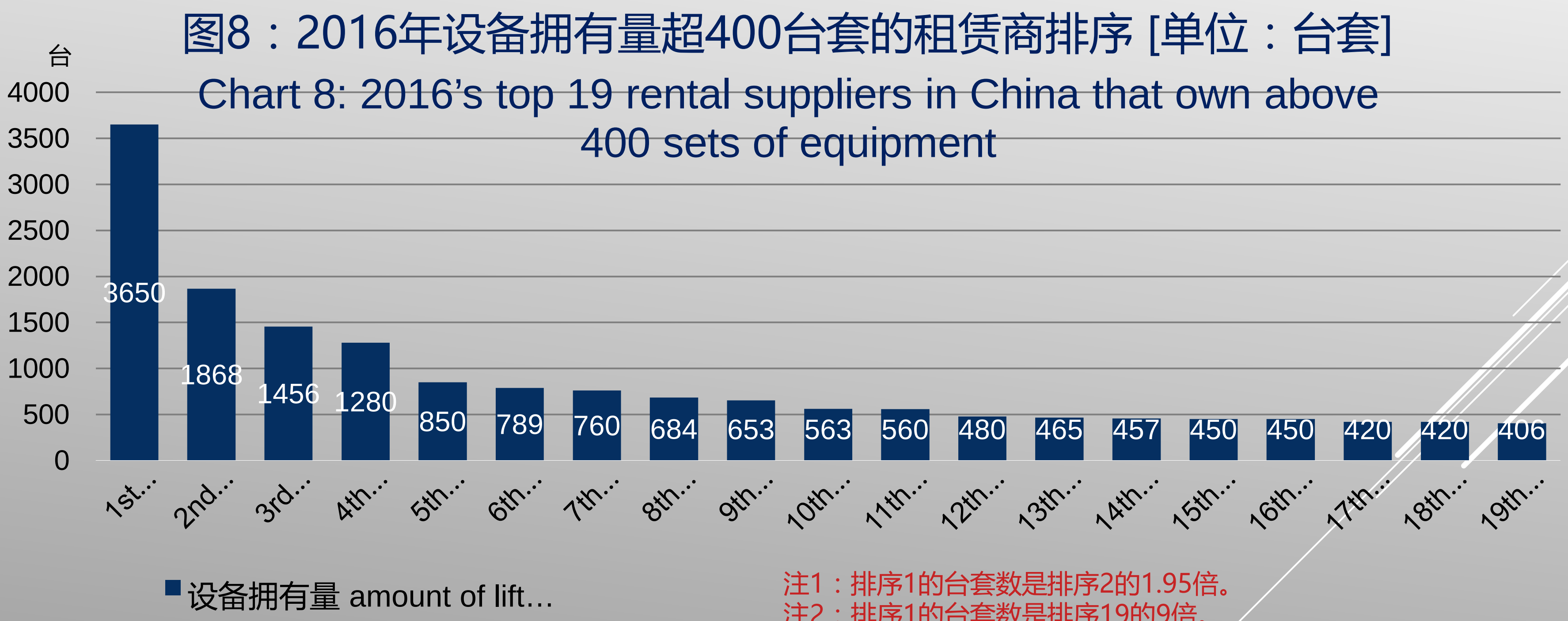
$$\frac{38257 - 24137}{24137} = 58.5\%$$

③ 前12位地区的2016年相比于2014年的设备拥有量增长率为：
2016-2014’s growth rate of the total amount of lift equipment possessed by the top 12 areas in China.

$$\frac{38257 - 12424}{12424} = 208\%$$

5. 设备拥有量前19位的租赁商（见图8）

the top 19 suppliers with the biggest equipment amount （Chart 8）



注1：排序1的台套数是排序2的1.95倍。
注2：排序1的台套数是排序19的9倍。
Remark 1: rank 1 is 1.95 times of rank 2.
Remark 2: rank 1 is 9 times of rank 19.

6. 设备拥有量前20位~39位的租赁商（见图9）

the top 20th to 39th suppliers with the biggest equipment amount （Chart 9）

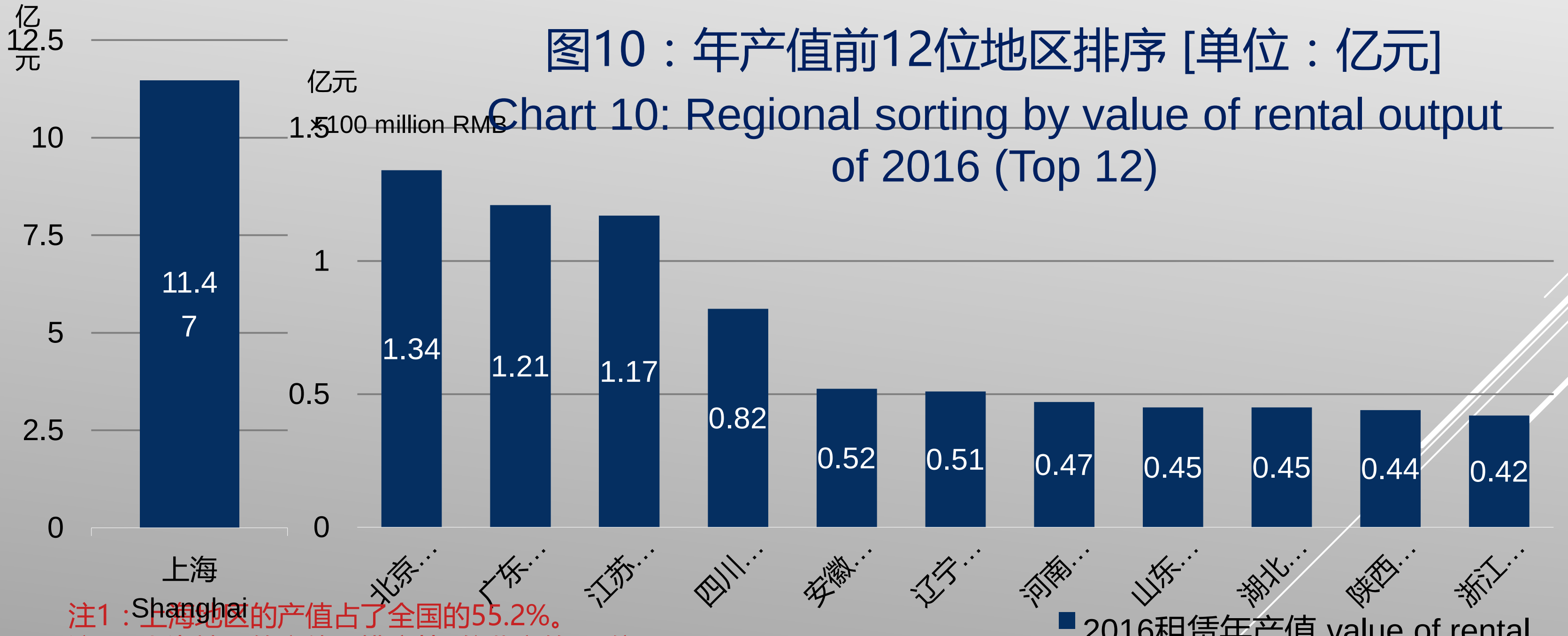
（三）高空作业平台租赁产值 the rental output value of lift equipment

2016年243户租赁商的租赁年总产值为 20.78亿元。

The total rental output value of the 243 suppliers in 2016 is 2.078 billion RMB.

1. 2016年租赁产值超过4000万的地区有12个（见图10）

the 12 areas with rental output value above 40 million RMB (Chart 10)



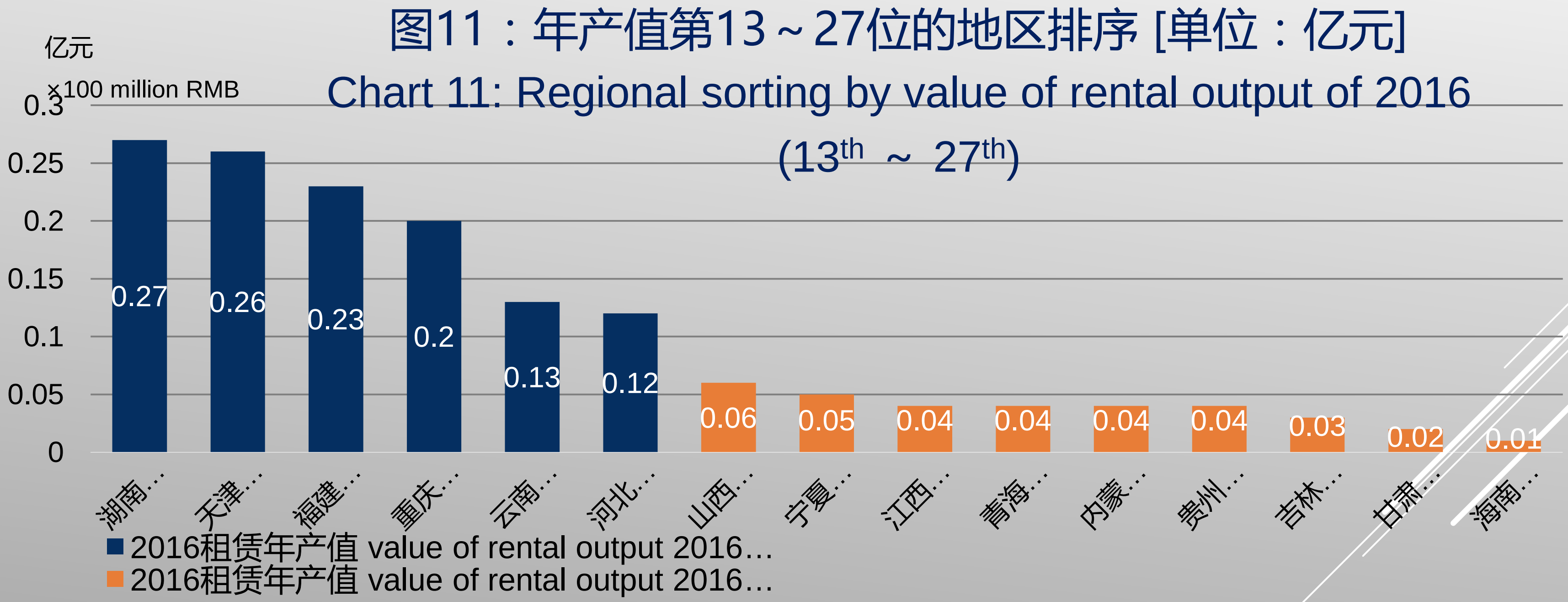
注1：上海地区的产值占了全国的55.2%。

注2：上海地区的产值是排序第2位北京的8.6倍。

Remarks: Shanghai's output value accounts for 55.2% of China and is 8.6 times of Beijing (Rank 2).

2. 2016年租赁产值低于4000万的地区（见图11）

the areas with rental output value less than 40 million RMB (Chart 11)



注1：蓝色柱图的6个地区的高空作业平台属于起步阶段。（地区产值1200万～2700万）

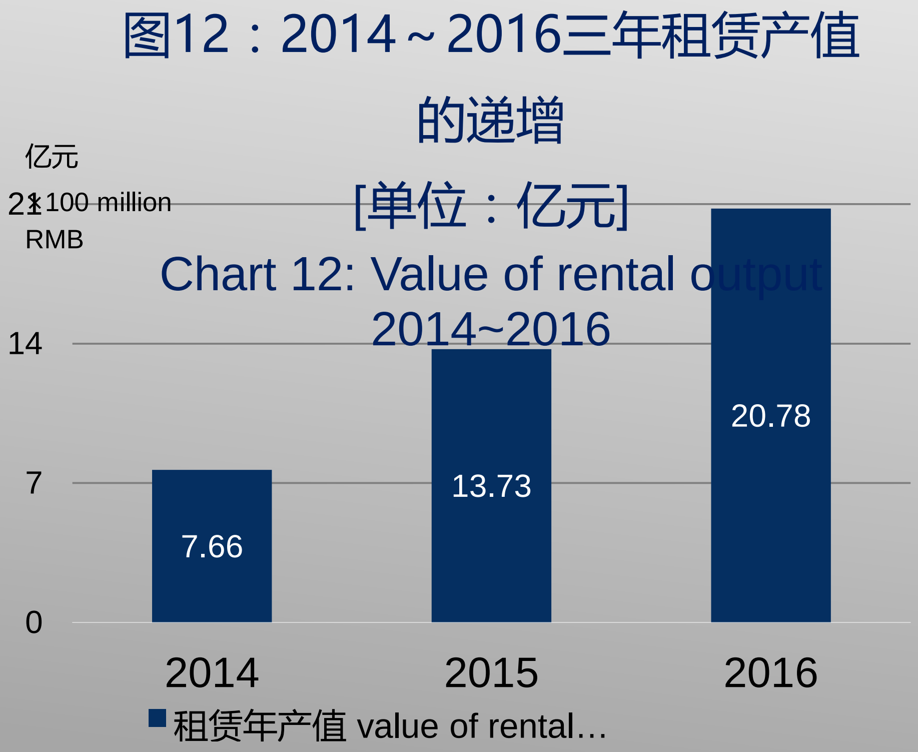
注2：橙色柱图的9个地区的高空作业平台处于刚出生时期。（地区产值≤600万）

Remark 1: the 6 areas in **blue block** with output value from 12 million RMB to 27 million RMB are at their beginning.

Remark 2: the 9 areas in **orange block** with output value less than 6 million RMB are at birth stage.

3. 近三年租赁产值的增速（见图12）

the growth of rental output value from 2014 to 2016 (Chart 12)



注1：2015年租赁产值年增长值6.07亿元，年增长率为79.24%。

注2：2016年租赁产值年增长值7.05亿元，年增长率为51.35%。

注3：2016年租赁产值是2014年的2.71倍。

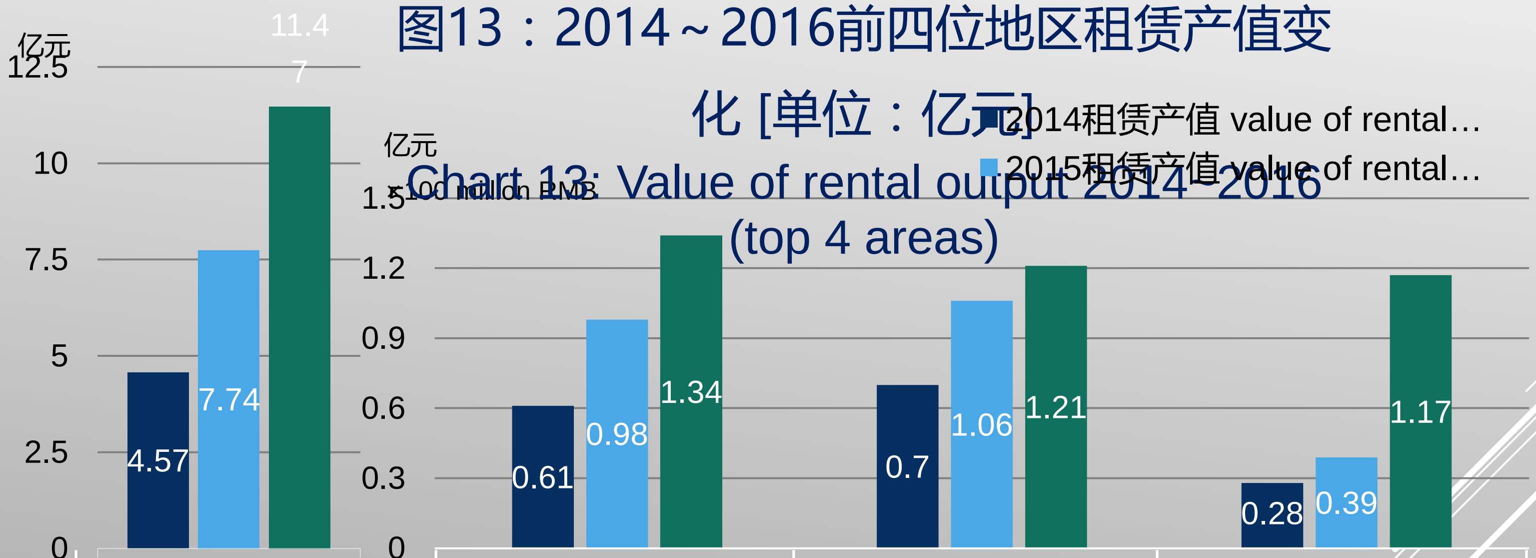
Remark 1: the growth of 2015 is 607 million RMB, growth rate 79.24%.

Remark 2: the growth of 2016 is 705 million RMB, growth rate 51.35%.

Remark 3: the value of 2016 is 2.71 times of 2014.

4. 租赁年产值过亿元地区的近三年租赁产值的递增（见图13）

the growth of the areas with rental output value above 100 million RMB (Chart 13)

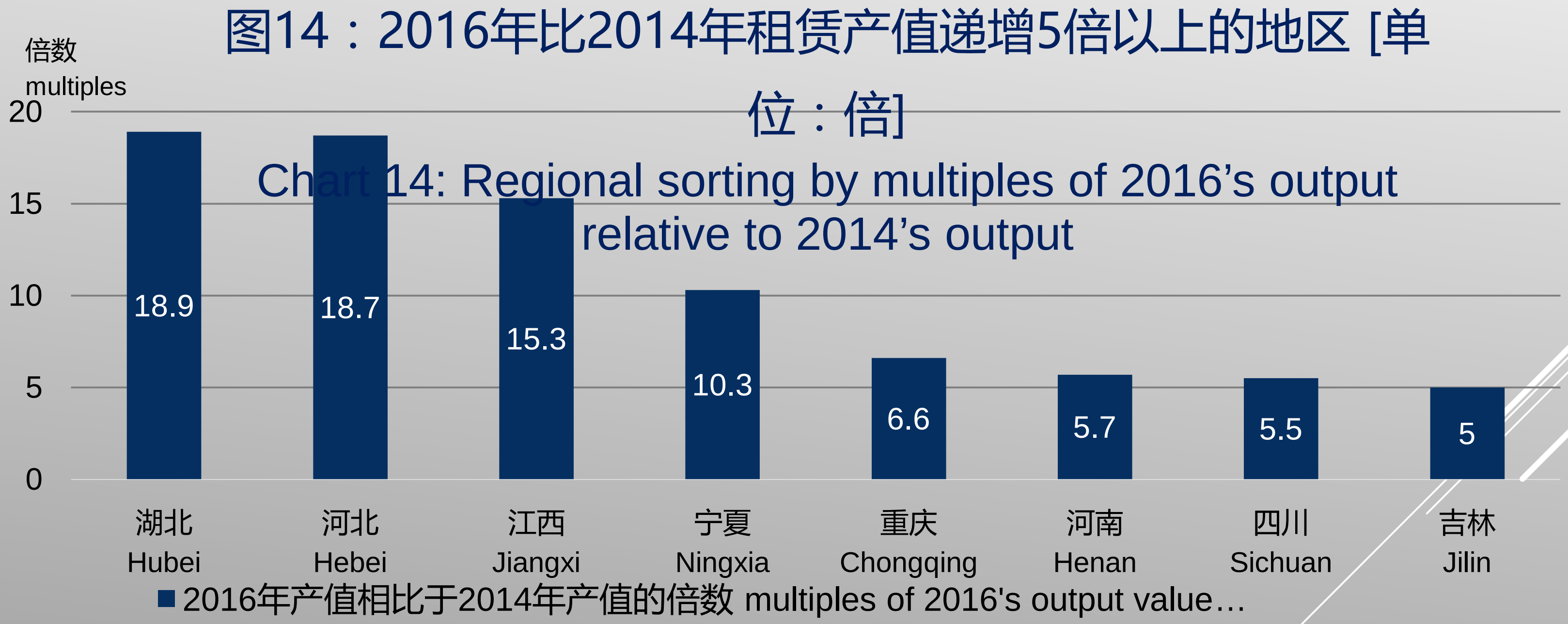


增长率 growth rate	上海 Shanghai	北京 Beijing	广东 Guangdong	江苏 Jiangsu
2015	69%	61%	51%	39%
2016	48%	37%	14%	200%
2014～2016	150%	120%	73%	318%

注1：江苏受上海影响最大。 Remark 1: Jiangsu is well influenced by Shanghai.

5. 近三年租赁年产值增速迅猛的8个地区（见图14）

the top 8 areas with the most impressive growth rate of rental output value (Chart 14)



6. 2016年租赁产值前十位的租赁商（见图15）

the top 10 suppliers with the highest rental output value in 2016 (Chart 15)

注1：前十位租赁产值和为7.75亿元，占全国的37.3%。

注2：第一位（上海宏信）一家产值占全国11.4%。

Remark 1: the total output value of the top 10 suppliers is 775 million RMB, which accounts for 37.3%.

Remark 2: the top supplier (Shanghai Hongxin) accounts for 11.4% alone.

谢谢大家

Thank you