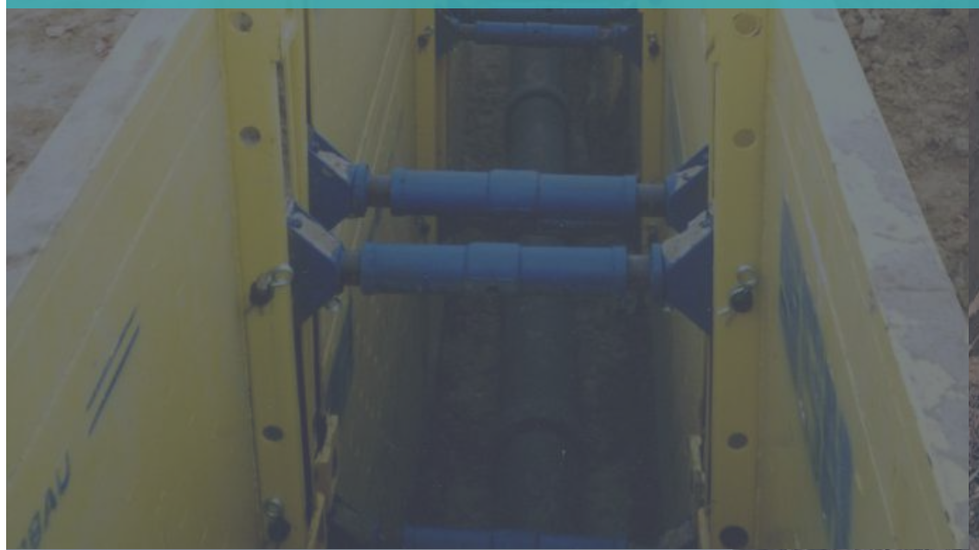
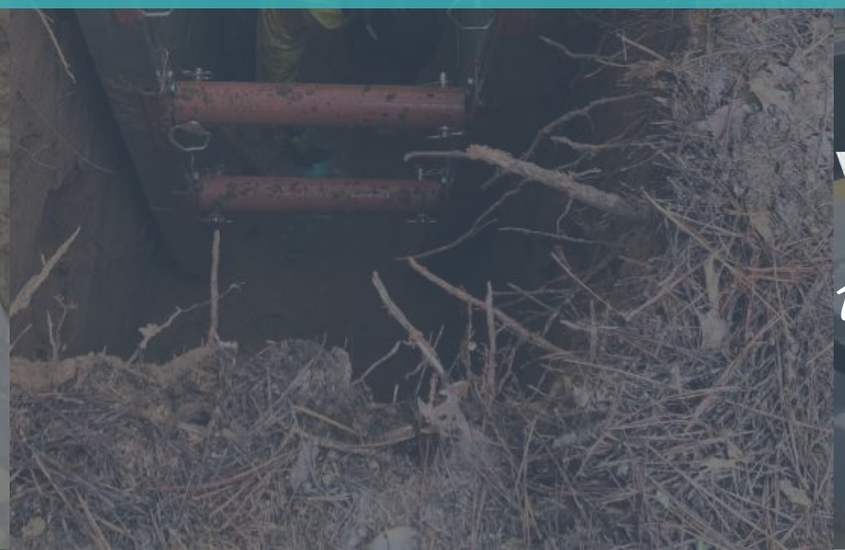


North American Trench Shoring Equipment Rental Market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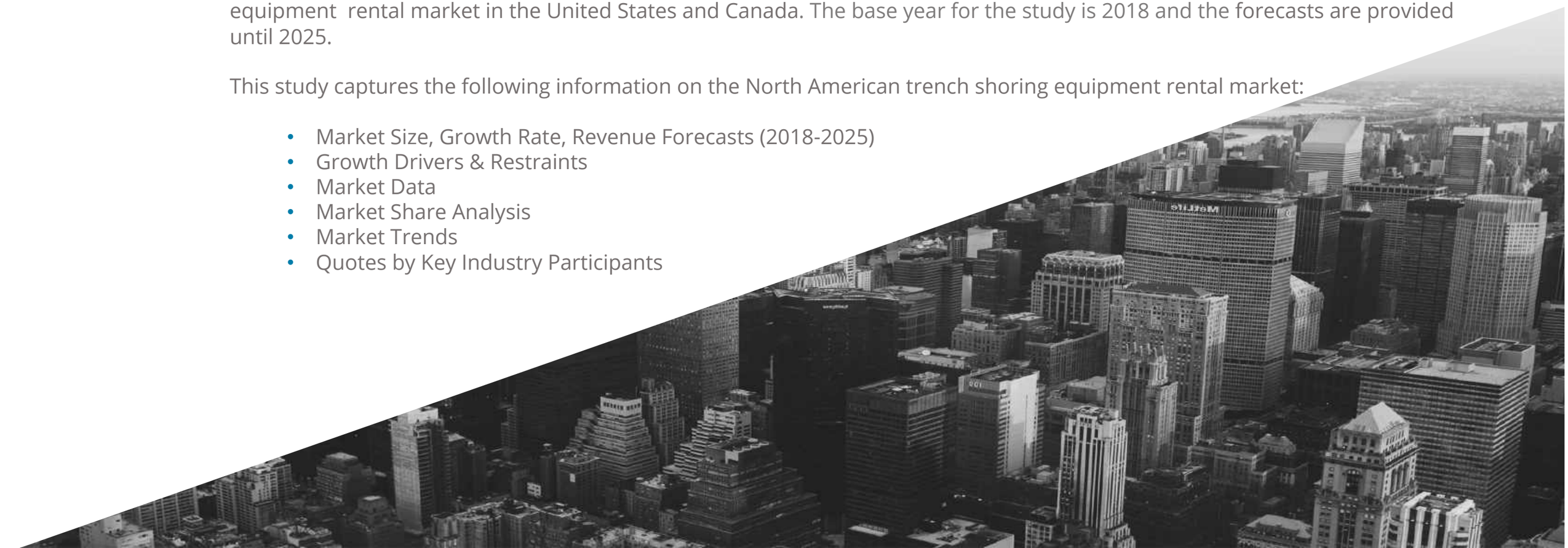
Research scope

This study aims to provide a detailed analysis on the North American trench shoring equipment rental market along with qualitative trends for the year 2018. Trench shoring equipment, for temporary applications, enables customers to safely work in an excavation environment and meet OSHA and other safety-organization guidelines.

The market numbers included in this report represent revenues generated by companies operating in the trench shoring equipment rental market in the United States and Canada. The base year for the study is 2018 and the forecasts are provided until 2025.

This study captures the following information on the North American trench shoring equipment rental market:

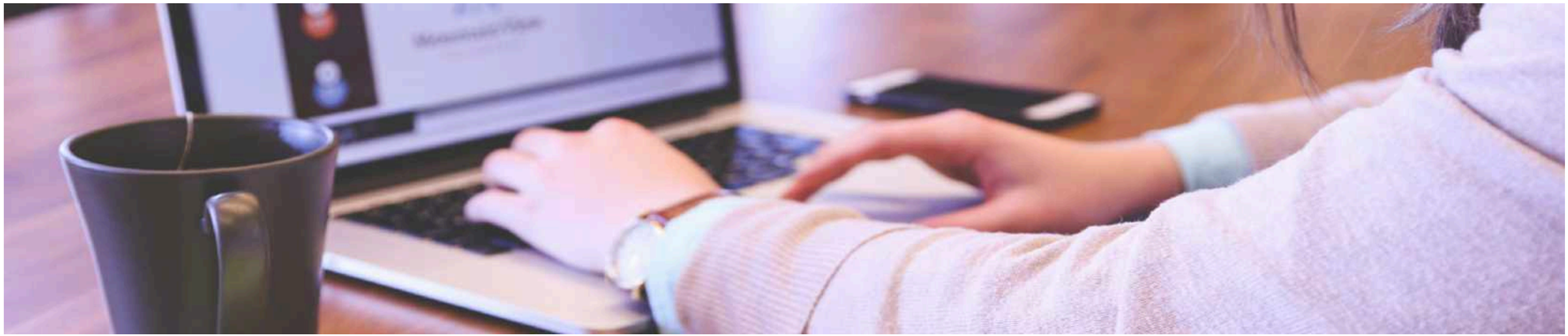
- Market Size, Growth Rate, Revenue Forecasts (2018-2025)
- Growth Drivers & Restraints
- Market Data
- Market Share Analysis
- Market Trends
- Quotes by Key Industry Participants



North American Trench Shoring Equipment Rental Market

Methodology

Interviews with key market participants: The research methodology adopted while conducting this study involved conducting interviews with various key market participants, enabling Verify Markets to identify various trends for the trench shoring industry. Furthermore, discussions with industry participants enabled us to provide a comprehensive view of the overall market. Next, the information was validated through our internal databases and market experts. Later, the collected information was structured and collated into this report.



North American Trench Shoring Equipment Rental Market

Definitions: Equipment types

Shoring shields: Shoring shields and boxes, typically made of steel, are a staple in the trench shoring industry. The primary advantage of shields is to provide a clear open space as opposed to trench jacks where struts are continually obstructing the workers and the production work. Shields provide continuous sheeted protection from the trench wall that prevents raveling or caving soils from injuring workers and disrupting the production work area. Trench boxes are moved and set into place by the save equipment that is being used to excavate the hole. Shields are most commonly used for pipeline and other linear utility installations owing to their ability to be dragged along with the production operation. In deeper excavations of over 16 feet, workers tend to feel far more comfortable working inside shoring shields than trench jacks. Because of their protracted use in pipeline and pit construction, low purchase cost as compared to long-term rental, and practically no required maintenance, contractors own more shoring shields than any other piece of shoring equipment.

Shoring shields, made of aluminium, are lightweight and modular. Aluminum weighs approximately 14.1 lb. per in. thick sq. feet. while steel weights 40.8 lb. per in. thick sq. feet. One the primary benefits of aluminum shields is the ease of installation. Trench cages can be quite large and therefore require heavy machinery to maneuver. Installation of these heavier materials typically requires more workers and can take a large portion of the work day. The lighter, smaller nature of aluminum shoring materials means less workers and it only requires a small piece of equipment for installation.

Source: Excavation Systems: Planning, Design & Safety

North American Trench Shoring Equipment Rental Market

Definitions: Equipment types

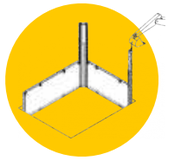
Hydraulic Shoring: Hydraulic shoring uses hydraulic pistons that can be pumped outward until they press up against the trench walls. Hydraulic shores, made of aluminum, a.k.a. trench jacks and vertical shores, have been used successfully in North America since the early 1950s. At the time they were a major technological advancement over timber shoring due to the fact that they could be installed and removed from outside the trench, so that the worker did not have to risk entering an un-shored excavation to install the shoring. Hydraulic shores can be installed by a single worker as fast as the trench is cut, greatly reducing shoring time and cutting costs dramatically. The original design has changed very little. Accordingly, there are several manufacturers with many parts being almost interchangeable. Basic elements include rail, pin, cylinder block, hydraulic cylinder, and hydraulic hoses.

Road Plates: Road plates can be considered a simply supported steel bridge deck. Steel plate trench covers have been used since the late 1800s. Today when trenches and open pits in the street are not being worked in, it is standard practice to completely cover them. For road plates, the expectation is that the road will be much the same as it was prior to construction, smooth and drivable at normal speeds. Road plates are normally loaded and hauled out of the supply yard and delivered to the job site with a boom truck.

Source: Excavation Systems: Planning, Design & Safety

North American Trench Shoring Equipment Rental Market

Definitions: Equipment types



Slide Rail System: The slide rail shoring system represents a major innovation in shoring technology. The system is most efficient in “bad ground” where dig and set shoring systems, such as trench jack and shoring shields, will not work because the ground collapses before the shoring can be installed. The slide rail system features a vertical rail post and panel that are manufactured and designed to slide relative to each other specifically for the purposes of digging the system into the ground.

The system was first brought to the United States in the early 1980s on the East Coast and Gulf states. Both these regions have a large share of soft marine clays well-suited to slide rail use. After a large financial investment and promotion effort by select shoring rental companies, the system became accepted as an equal alternative to other systems. Slide rail is the best and least expensive alternative shoring system when dig and then set shoring systems are no longer an option.

Source: Excavation Systems: Planning, Design & Safety

North American Trench Shoring Equipment Rental Market

Definitions: End user industries

For purposes of this study, trench shoring equipment rental refers to construction applications that encompass some form of underground excavation work.

Water, wastewater, and storm infrastructure – These include underground pipelines for transportation of drinking water, pipes, and other infrastructure which are a part of a storm drain system and waste or sewer water from drains and other sources.

Oil and gas distribution infrastructure – Planning, construction, operation, and maintenance of storage tanks and pipelines for distribution of oil and natural gas.

Transport infrastructure – Refers to the planning, construction, operation, and maintenance of roads, bridges and tunnels, and underground railroads, among others.

Electrical utility - Comprised of power utility companies using shoring equipment for underground utility work. Underground utility construction today utilizes many “trenchless” construction and rehabilitation procedures that greatly reduce the need to dig trenches or excavations to install and maintain buried infrastructure. Nonetheless, the bulk of utility work continues to be done by conventional cut-and-cover methods, requiring wide, deep, man-entry trenches.

About Verify Markets

About us

Expert Advice and Strategy Consulting

Verify Markets is a Research Firm specializing in Industrial, Environmental, Energy and Water markets. Our Research & Consulting practice provides global industry analysis, custom engagements, end-user analysis, strategy consulting, strategic market intelligence, and forecasts that are designed to facilitate strategic decision-making. Our team of consultants, industry experts and analysts continually monitor and evaluate information to create insights for your business needs. We are comprised of a group of analysts that have been tracking their respective markets for a number of years.

Our goal is to help you reach yours.

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methodology

The methodology when formulating market trend projection is outlined below. Historical trends were determined through secondary research and Verify Markets in-house database.

- Secondary research was conducted. A list of key industry participants was put together.
- Telephonic interviews were conducted. Most of the leading participants across all countries were contacted.
- Bottom up methodology was used to calculate the market size.
- Market drivers and restraints were built into the forecasting model to estimate the revenue growth and market size figures.

primary research

Profiles of Interviewees: Vice President, Marketing Manager, Business Development Manager, Brand Manager, CEO (for smaller companies).

Most of the primary interview data was captured through telephonic interviews. Pictures, company contacts, preliminary data was captured through secondary research. Images are derived from company websites and other web sources.

awards

Verify Markets identifies companies that are leaders within a respective industry. These companies are given awards, which are selected by the consultant writing the report. Companies can promote their award publicly to boost brand awareness and confidence.

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Disclaimer

Despite Verify Markets' best efforts, certain challenges were encountered and certain assumptions had to be made. The competitive nature of the trench shoring equipment rental market often results in an increased reluctance on the part of several competitors to discuss their market position, future plans, or market trends. Verify Markets used its skills and experience to extract the relevant data in order to complete the analysis.

Verify Markets is not responsible for any incorrect information supplied to us by companies during our primary research process.

Verify Markets report is for customers' internal use and not for general publication. This research cannot be given, disclosed, or sold to non-customers or third parties.

Since most of the data is based on company personnel views, it is subject to fluctuation.

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