

INTERNATIONAL

# rental

NEWS

JUNE 2023

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A KHL Group Publication

IRN100 SURVEY

# Supercharged North America

p24

INTERVIEW

EQIN on expanding its  
industrial rentals business

p19

**ire** 2023  
International Rental Exhibition

**IRIX** 2023  
MAASTRICHT  
10<sup>th</sup> EDITION  
6-8 JUNE

IRE & APEX

Rental suppliers  
in Maastricht

p39

Official magazine of the ERA



SPECIALTY RENTAL | MINI AND MIDI EXCAVATORS | RENTALTRACKER

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## The IRN100 issue

**T**his year's IRN100 survey, published on page 24, is revealing for several reasons. First, it reinforces the dominant position of North America in the global rental business – its companies are bigger and growing faster than everywhere else, with the exception of China.

That scale, and the rate of growth, suggests that there is plenty of room yet for the biggest rental companies to continue to expand in their home territory. There are lots of businesses – Sitepro, H&E and Sunstate come to mind – that have enormous scope to expand. Even Ashtead's massive Sunbelt Rentals, with around 1,000 sites in the US alone, has a cluster strategy around key market areas that will see it continue to expand its footprint.

The second thing to note from the survey is what it reveals about fleet spending. The largest 25 spenders in the top 100 invested around €12.2 billion gross on their fleets last year. That is almost 50% more than in 2021.

That says a lot about the appetite for equipment and is especially remarkable given the constraints on supply that the industry has been facing. Had there been no supply chain issues, the figure last year would have been even higher. It is possible that limits to supply – perceived to be a bad thing – have actually helped level out demand over a manageable period, and at the same time allowed rental companies to maintain price and utilisation levels.

There is more in this issue than the IRN100. We provide a last-minute preview of the IRE and APEX exhibitions, and my colleague Lewis Tyler, IRN's new Deputy Editor, contributes an interesting interview with the CEO of EQIN, the Dutch industrial rentals business that was formerly part of Stork.

We also have an interview with Western Global, the supplier of diesel fuel tanks to rental companies. What does a firm do when its business model is predicated on fossil fuels? Read the piece on page 57 to find out.

We hope that you enjoy the issue, and to those of you travelling to Maastricht for IRE, APEX and the ERA Convention, we look forward to seeing you there.

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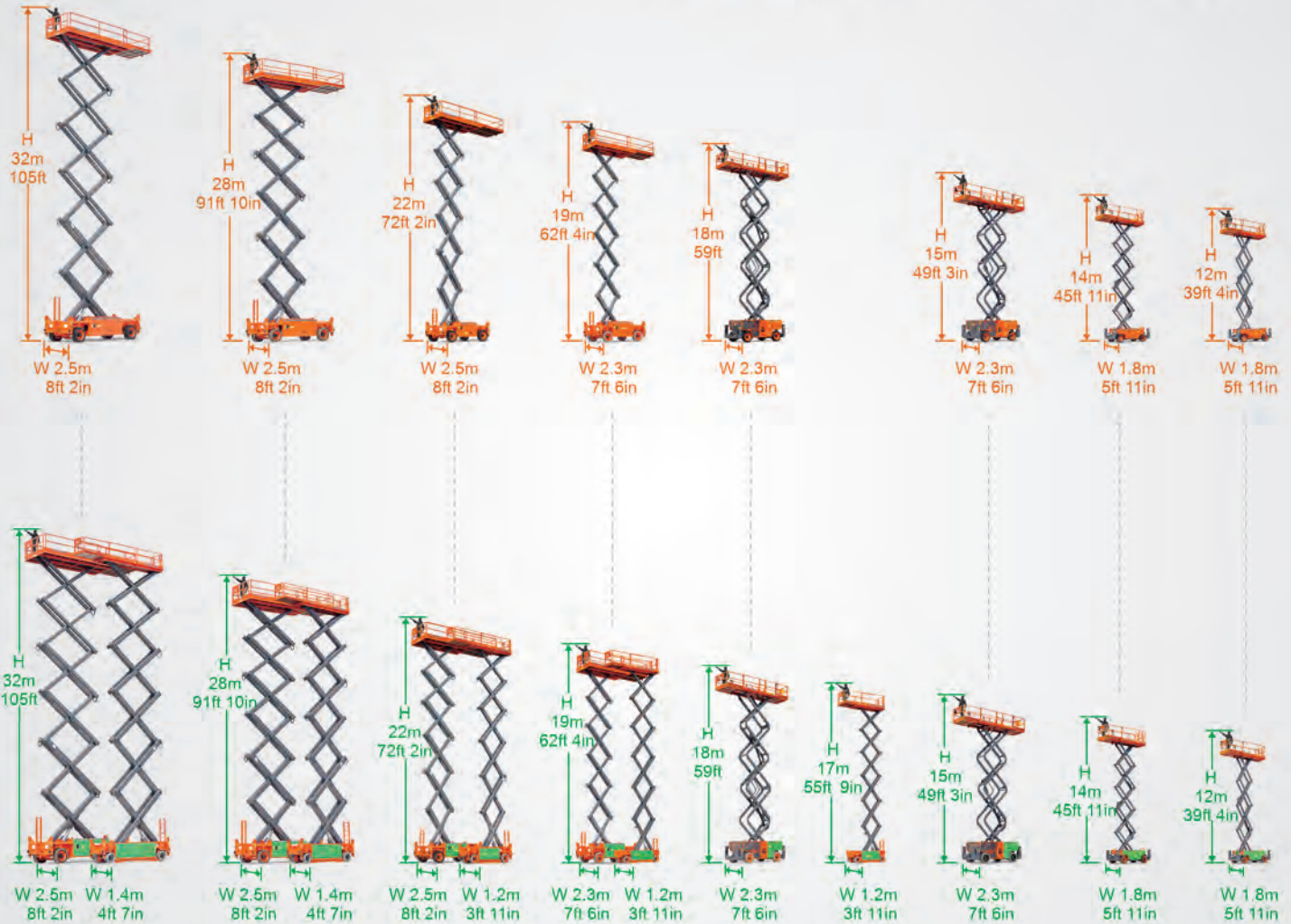
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**Global TOP3**

2021 Industry Global Manufacturers Sales Ranking

\*Data source: (Access International)



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*IRN's* league table of the top 100 rental companies in the world based on 2022 revenues features on pages 24-36.



PHOTO: ADOBE STOCK

## EquipmentShare completes €264 million funding round

EquipmentShare has completed a \$290 million (€264 million) funding round that will enable it to grow its coverage and invest in its digital solutions.

The round was led by funds affiliated with BDT Capital Partners and included participation from existing investors and several new investors, including Brown Advisors. It is the latest to be carried out by the company, which also held a funding round in 2021 to support the launch of its T3 management system.

Trevor Schauenberg, EquipmentShare CFO, said the company will use the funding to “expand our US footprint, continue to invest in our T3 technology platform and further strengthen our balance sheet for future opportunities.”

Jabbok Schlacks, CEO and co-founder of EquipmentShare said, “Our growth continues to be fuelled by new customers who are ready for a technology-driven construction solution.”

“This latest round of funding brings in growth capital from both new and existing investors. We were pleased to have completed this raise in a challenging macro-economic environment at a valuation that was 40% higher than the previous raise in 2021.”

Henry Yeagley, partner & head of Middle Market at BDT & MSD Partners, said, “We’re thrilled to partner with Jabbok and Willy Schlacks and the entire EquipmentShare team to help build the connected jobsite of the future.”



Investment in 2022 increased by 47% for the top 25 spenders.

PHOTO: ADOBE STOCK/ KZENON

# IRN 100 Investment levels reach historic highs

Investment levels among the largest 100 equipment rental companies in the world reached very high levels in 2022, despite supply chain constraints.

The new IRN100 survey – published in this issue – reveals that the biggest 25 spenders invested €12,2 billion, gross, in their fleets last year, a remarkable 47% increase on 2021.

The figures reveal that rental companies continued to invest even as wider economic conditions were weakening.

This year’s survey also reveals a striking difference in rental growth rates between North American companies and their counterparts in Europe and elsewhere.

The survey revealed that, on average, North American businesses grew by

almost 15%, compared to growth rates of less than 4% for Europe and the rest of the world.

IRN estimates that the IRN100 companies generated revenues of more than €66 billion last year, which may represent as much as two-thirds of the entire global rental market.

► Read the full list starting on page 24.

## Boels buys Norwegian renter

Boels Rental has acquired Norwegian rental company BAS Maskinutleie, a business with eight locations throughout the country.

BAS, which reported revenues of €32 million in 2021, is being sold by its 100% owner, AS Backe, a company with interests in construction, property and equipment rental.

The deal has to be approved by Norway’s competition authorities.

Boels said the deal will strengthen its Nordic subsidiary, Cramo, in Norway.

“A leading market position is important to increase resilience and to leverage future growth,” said Pierre Boels, CEO of Boels Rental, “It is our aim to have a top three position in all our markets.”

BAS Maskinutleie was established by Backe in 2008 and has a wide range of equipment and rental services.

Eirik Gjelsvik, CEO of Backe, added, “Both companies complement each other well.

As part of Cramo, BAS Maskinutleie will benefit from the resilience and long-term growth strategy of its new owner.”

Cramo’s CEO, Martin Holmgren, said BAS Maskinutleie was a well-established company that “not only adds equipment and locations to Cramo Norway, but above all new competences and expertise.

“We can now build on two solid structures, the combined strength of which will add value to our Norwegian customers.”

BAS has depots in Hof, Grålum, Lindeberg, Gjøvik, Elverum, Trondheim, Kristiansand and Klepp.

Boels Rental and its subsidiary Cramo have a network of more than 725 branches in 18 countries and employ more than 7,000 people.

Boels owns Nordic renter Cramo.



PHOTO: BOELS

### IN BRIEF

■ **Kiloutou Germany** has signed up to join the global network of companies using software equipment services and parts procurement solutions from SmartEquip.

■ UK rental company **HSS Hire** has said it will continue to expand the services and products it offers on its HSS ProService online marketplace and is rolling out the offer to its largest clients.

■ **Easy Lift’s** collaboration with Loxam Italia has continued with another order for four spiders from the European rental giant, consisting of two R180 models and one R160 and R210.

■ **The European Rental Association (ERA)** has announced plans to organise a ‘European Rental Week’ to promote equipment rental across Europe. The event will take place from 9 to 15 October.

**Atlas Copco has unveiled the B-Air battery compressor prototype.**

**Maarten Vermeiren, product marketing manager sustainability and digitalisation for Atlas Copco Portable Air Division, said the B-Air was launched in response to user demand for a battery solution on site. The company says the**





## JCB launches fully electric boom lift

JCB has launched the A45E electric boom lift. The machine has a maximum platform height of 13.84m with 7.47m horizontal reach, 300kg basket capacity across the entire envelope, along with secondary guarding as standard, slew lock and emergency override, as well as solid rough terrain tyres.

The A45E is powered by eight 6V batteries, creating a 48V, 400AH operating system. The battery packs are located on either side of the lower chassis, maintaining a low centre of gravity for added stability and improved traction. The batteries power AC drive motors via motor controllers and the machine's hydraulic pump through a hydraulic motor controller.

It also has a four-wheel drive and two-wheel steering as standard. The wheels are driven by four AC motors which recover energy through regenerative braking, to prolong battery performance.



A45E fully electric boom lift.

### DIARY DATES

#### IRE/APEX

6 – 8 June 2023

Maastricht, The Netherlands

#### EUROPEAN RENTAL CONVENTION

6 -8 June 2023

Maastricht, The Netherlands

For more information on upcoming events, please visit [www.khl.com/events](http://www.khl.com/events)



PHOTO: ATLAS COPCO

# Atlas Copco to acquire pump specialist NPE

Atlas Copco is to acquire National Pump & Energy (NPE), a major pump, power and compressor rental and sales business in Australia and New Zealand.

The deal is expected to close during the second quarter of 2023. The price has not been disclosed.

Headquartered in Queensland, the company employs 420 staff and generated revenues of SEK1.4 billion (€138 million) in 2022. In addition to pumps, it rents generators and compressors.

NPE will become part of the Specialty Rental Division within the Power Technique Business Area of Atlas Copco. A statement on the NPE website said it will continue to operate as NPE.

Andrew Walker, business area president Power Technique, said, "NPE has strong market recognition, and great expertise. The acquisition will strengthen our presence in dewatering and water treatment, which is an area where needs are increasing due to climate change and more frequent flooding events.

"This is driving the need for fast response and specialty dewatering solutions."

National Pump & Energy (NPE) has



PHOTO: ATLAS COPCO

The deal is expected to close in Q2 2023.

also experienced its own growth through acquisitions over the past decades.

The business took on its current identity in 2015 with the merger of National Pump

Services (NPS) and Resource Equipment Limited (REL), while in 2021 it acquired Vortex Group, expanding its national footprint to 12 branches in the process.

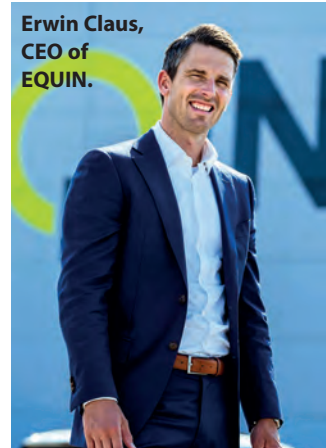
## EQIN plans growth in Western Europe

Erwin Claus, CEO of Netherlands-based industrial equipment rental company EQIN has revealed details of the company's plans to expand into the European market.

Speaking to *IRN* via video call, Claus said the company's "big goal" is to supply every industry professional in Western Europe with its solutions, which will start with a new branch in Germany that will open in the coming weeks.

Claus said, "We have branches for our rental company in the Netherlands and Belgium and in a few weeks, we will open our first branch in Germany.

"It is evident that Germany or France is



Erwin Claus, CEO of EQIN.

PHOTO: EQIN

the next step for expansion. Both countries are large rental markets in Europe so there is a lot of potential for us as a company."

On its wider expansion plan, Claus said EQIN, which is predominantly based in the Benelux region, is looking at "growing organically" and will seek potential mergers and acquisitions with other rental firms that "fit together with EQIN."

In terms of expanding its rental equipment, Claus said EQIN is focusing on reinforcing what the company do best and not veering from its equipment on offer.

► Read the full interview with Erwin Claus on page 19.

product features no local emissions and emits low noise pollution. It also says the compressor allows up to 1.5 to 2 hours of usage if used at maximum capacity.

Vermeiran added it also has the potential to save up to 70% of energy in comparison to a diesel fuel compressor. It will go into production at the end of 2023.

■ **Renta Group** has revealed that it saw a 40% increase in its sales for the year ending 2022.

■ **AER Rents** has announced the acquisition of Hudson Lifting, a UK-based rental company that specialises in lifting and height safety equipment.

■ **Zeppelin Group** is buying Danish rental company CP ApS, a three-location

specialist in the rental of temporary accommodation and general construction equipment and tools.

■ **Himoinsa** has acquired Powersil, a supplier of generator sets and manufacturer of electrical panels and automation systems.

■ **Kiloutou** has posted record revenues for 2022, exceeding €1 billion for the first time in its history.

PEOPLE NEWS

■ UK powered access company **Star Platforms** and temporary power specialist **Star Power** have announced the appointment of **Michael Hooton** as finance director. Hooton will oversee the entire finance department and will be responsible for managing the group's financial strategy, budgeting, forecasting, and reporting.



■ **Cummins** has added to its off-highway engine business with the appointment of two new senior executives. **Phil Dawson**, who replaces Annie Schmelzer as Cummins' global agriculture segment leader, will lead the company's agriculture business strategy, while he will also oversee the business' global agriculture account teams. **David Atkinson**, who takes the role of global off-highway support, will assume responsibility for the delivery of "best-in-class customer support" to Cummins' agriculture and construction clients.



# APEX and IRE sold out

The International Rental Exhibition (IRE) and APEX shows have both sold out, with 100 suppliers signed-up for IRE and more than 125 attending APEX.

The shows are co-located at the MECC in Maastricht on 6 to 8 June and are being held alongside the European Rental Association (ERA) convention on 7 and 8 June.

APEX will be the largest selection of access equipment anywhere in the world this year, while IRE will be a fantastic showcase for the latest battery powered equipment as well as software and technology used by rental companies.

Combined, the exhibitions represent the perfect opportunity for visitors to see the full range of products and technology used in the rental industry.

Tony Kenter, CEO of Industrial Promotions International BV (IPI), the show organiser, says: "The shows represent a tremendous opportunity for equipment buyers to see a wide range of products and services within a single, easy-to-navigate location."

"Rental companies and other buyers have an appetite to see the latest battery powered or low emission machines, as well as new working at height solutions. The phrase 'one stop shop' may be



overused, but it's an accurate description for what's happening in Maastricht on 6 to 8 June."

It will be the first time the shows have

been held since 2017, with the 2020 events cancelled because of the pandemic.

Visitors who register for one show will have free access to the other. Free shuttle buses will be running to MECC from Brussels Zaventem Airport and Düsseldorf Airport. Check the time tables here.

For those flying to Amsterdam Schiphol, the train journey to Maastricht takes between 2.5 and 3 hours.

IRN RENTAL SHARE INDEX				
COMPANY		4/4/23	5/5/23	CHANGE (%)
Ashtead Group	UK£	49.4	45.5	-7.9%
Emeco	A\$	0.72	0.67	-6.9%
H&E Equipment	US\$	44.00	32.62	-25.9%
HSS Hire	US\$	0.12	0.15	+25.0%
GAM Alquiler	€	1.19	1.39	+16.8%
Herc Rentals	US\$	112.4	94.33	-16.1%
Kanamoto	Yen	2217	2257	+1.8%
Nishio Rent All	Yen	3190	3235	+1.4%
Speedy Hire	UK£	0.33	0.33	-
United Rentals	US\$	389.1	328.4	-15.6%
VP PLC	UK£	6.72	6.60	-1.8%
WillScot	US\$	46.3	41.89	-9.6%
<b>IRN Index</b>		<b>887.5</b>	<b>781.0</b>	<b>-12.0%</b>

## Unlock the full potential of your connected fleet

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ARX 23.1-2 | ARX 23.1-2C | ARX 23-2 | ARX 23-2C  
ARX 26.1-2 | ARX 26.1-2C | ARX 26-2 | ARX 26-2C  
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## What can the rental industry do about rising costs and higher interest rates?

IRN columnist Andy Wright says getting paid fairly would be a start.

# The perfect storm?

**W**e live in very challenging times. For people of a certain age, and I'm including me in that age bracket, we have been here before (sort of), dealing with high levels of inflation and high interest rates. When I joined the industry in 1989, inflation was running at around 8% and interest rates had been hiked to nearly 15% (yes you did read that correctly) in an attempt to control soaring house prices. In the 1970s inflation averaged 12% across the decade and peaked in 1975 at almost 25%!

So, what's the big deal now that inflation is *only* 10% and interest rates remain below 5%?

Well, there are some very big differences, now to then, which I believe means that the rental industry could be in the middle of an existential crisis for some of its players, and it's not just because of inflation.

### So why is this current period 'the perfect storm'?

Well firstly, we are currently at the beginning of the most significant technology transition ever, in the history of the industry. Everything is changing or about to change. Diesel, which most of the equipment in the sector runs on, is now seen as bad and numerous alternatives are being developed, from HVO, to electrification, to solar to hydrogen or some combination of them all.

It's not absolutely clear yet which new technology will win out to be the predominant one for the future, so that in itself is a major risk for rental companies as we decide which we should invest in.

And that question assumes that you can either raise the debt required to do so or pay for it when you have raised it, given the spiralling cost of debt currently. So, both fleet renewal and fleet transformation to new technologies are very problematic issues now.

The second issue relates to OEM supply chains and their ability to supply equipment in a timely manner. They are constrained, with lead times extending beyond a year for some products, meaning fleet renewal and transformation is taking longer than expected.

Thirdly, a combination of inflation and supply chain constraints are resulting in rocketing OEM pricing, either through price inflation or surcharges. We have all seen numerous increases over the last two years and given the tightness of the supply chain, the OEMs are generally able to impose this new pricing onto the sector, like it or not.

### Supply and demand

Supply and demand combined with inflation is also affecting labour costs and availability, particularly around skilled trades. The average age of many of the skilled trades within rental companies continues to increase and the lack of young people wanting to do this kind of work is exacerbating this issue and pushing the cost of labour up significantly as businesses fight to hold onto their skilled staff.

War in Europe has driven energy costs to an unprecedented level, fuelling inflation and this has badly affected the profitability of companies throughout the industry. The cost of delivering equipment, using external haulage or their own vehicles, has increased dramatically. For an industry that doesn't always recover its cost of transport this is very damaging.

All other costs are rising massively too.

### So, what can we do about it?

Well, we could seek to reduce our cost base. This is a credible response to the rising cost of doing business but, as they say, you can't cut yourself to greatness. A reduced cost base will likely result in a reduced service level, which over time probably means a reduced revenue and profit stream, as customers find new suppliers who deliver a better-quality service, resulting in a further round of cost reductions, resulting in further revenue losses and the cycle of death by a thousand cuts. We have all seen this before, somewhere.

We could also stick our heads in the sand and hope it all goes away and things return to normal sometime soon. We could continue to do the same things that we have always done and ignore the fact that almost every aspect of how we do business has become significantly more costly. We could continue to let customers dictate

“ War in Europe has driven energy costs to an unprecedented level, fuelling inflation and this has badly affected the profitability of companies throughout the industry. ”

**ANDY WRIGHT** is CEO of Sunbelt Rentals UK and an experienced senior executive in the rental equipment sector. His career began in 1989, leading to roles including Managing Director Northern Europe at Aggreko, International Chief Executive of Lavendon Group and Managing Director UK & Ireland at Speedy Services.

how much they will pay for the great service that we as an industry provide and we could continue with the old pricing policies of undercutting the next lowest price and see who gets to the bottom first. For the record, I don't recommend this as an approach.

### So, what else can we do to deal with these issues now?

Well, in the past we had sensible rental rates to help to soften the blow. Currently, that isn't the case. In 1989, when I joined the industry with Aggreko, a 15KVA generator went on hire for £249 per 40-hour week, twice that if running 24 hours. We made excellent returns; customers got a great service; and we could afford to invest in keeping the fleet young and of a high quality.

Surely this is something that our customers need and that we should all want; being fairly paid for the great work we do, particularly right now as we approach the eye of 'the perfect storm'. **IRN**





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The ERA/IRN RentalTracker for the first quarter of 2023 shows the region’s rental companies in a kind of holding pattern, hoping for better things to come. Murray Pollok reports.

# Waiting game

At the end of March 2023, Europe’s rental companies seems to be almost in waiting mode, with the worst of the Ukraine energy impact behind them and the prospect of an easing of inflationary pressures, but still in the midst of a low growth economic environment.

It is possible that a rental survey in Europe at this point would be the most downbeat of any in the world, given

that the IMF is forecasting that the Euro zone will see growth of just 0.6% this year, the lowest by some margin of any region worldwide.

Asked about ‘business conditions now’ at the end of March 2023, more than 90 companies in Europe managed to maintain a positive balance of opinion of +17.6%, with 34% positive, 16% negative and almost 50% seeing no change. That means two thirds of the respondents

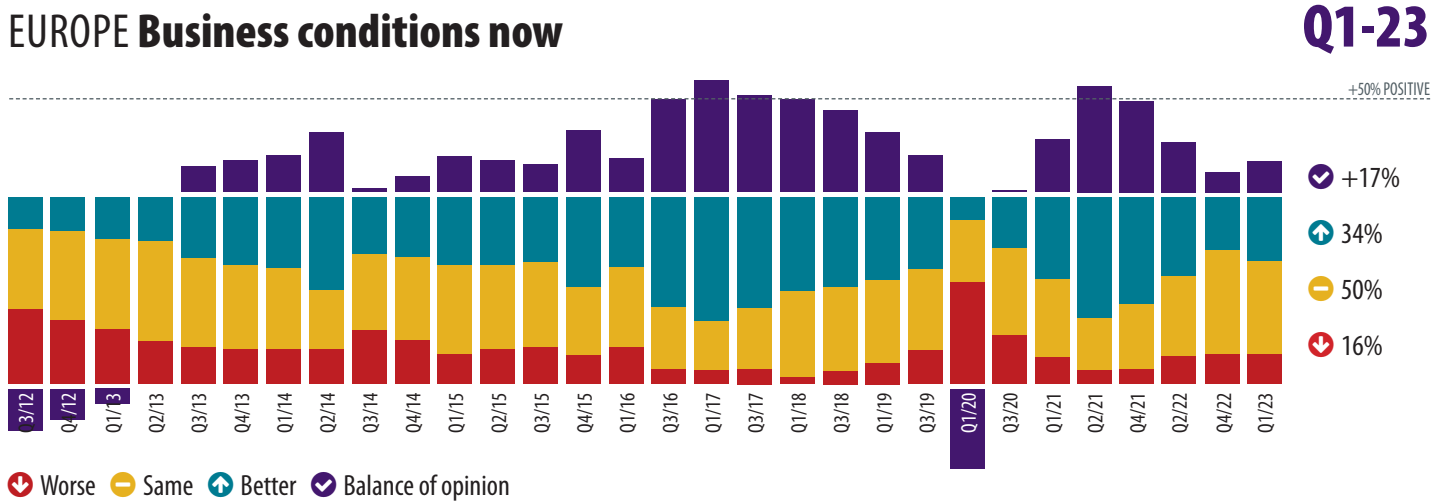
were either seeing no change or worsening conditions.

Still, the picture remains net positive and a slight improvement on sentiment at the end of December last year.

The ERA/IRN RentalTracker survey is conducted jointly by International Rental News (IRN) magazine and the European Rental Association (ERA).

In terms of business levels in the first quarter of this >

**FIGURE 1** EUROPE Business conditions now Q1-23



**FIGURE 2** EUROPE Expectations for year from now Q1-23

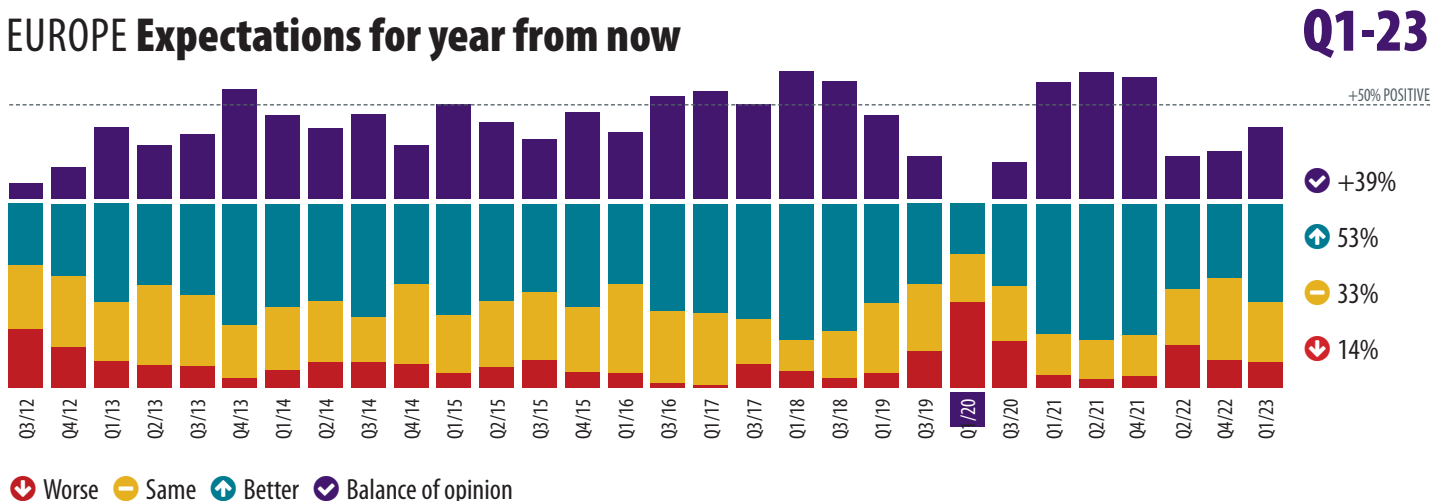
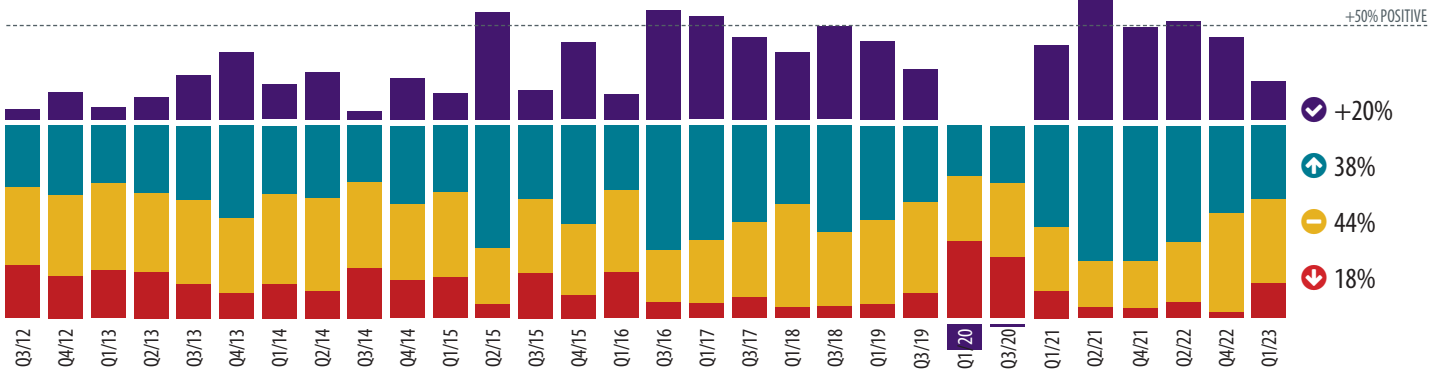


FIGURE 3

EUROPE Time utilisation trend

Q1-23



Worse Same Better Balance of opinion

TABLE 1

Forward thinking

PERCENTAGE FORECASTING BUSINESS TO BE 'BETTER' OR 'MUCH BETTER' 12 MONTHS AHEAD

Spain	89%	(44%)
UK/Ireland	58%	(30%)
Italy	58%	
All Europe	53%	(40%)
Multinationals	46%	
France	29%	(25%)

year compared to Q1 2022, there was a positive balance of +38%, with 53% seeing higher levels of business, 15% lower, and 31% the same.

That's very similar to the year-on-year comparator for Q4 2022, but a lot lower than the post-pandemic period when comparison periods were distorted by the Covid slowdown. It again points to a continued recovery from that difficult period and evidence of a continuing bounce back.

Utilisation trends

Other key business confidence measures for rental – time utilisation rates and employment intentions – also remained positive, but softening.

With fleet utilisation, there was a net positive balance of option of +20% (the difference between the 38% reporting improvements and the 18% seeing a deterioration). That +20% looks like a good figure, except that it is the lowest since the height of the pandemic in early 2020 and less than half the figure of the three surveys in 2022.

There is a slight weakening in employment intentions, but rental companies in Europe remain keen to employ

more people. Almost 50% of respondents said they would recruit more in the second quarter of this year against the 5% who said they would employ fewer staff.

This metric has remained high over the past two years – post the worst of the pandemic – and reflects the wider problems that companies are having to recruit and retain staff.

What about fleet investment intentions? Again, this data is complicated by supply chains issues which have 'choked back' supply and perhaps maintained investment levels at historically good levels even as economies have weakened.

There was a +13% positive balance of opinion on whether spending this year would be higher or lower than 2022. Some 29% said they would spend more this year, 16% said less, and the majority, 54%, said investment would be maintained at the same level.

That +13% positive balance compares to figures around the +50% mark throughout 2022, which means that companies last year were forecasting higher spending levels for 2023 than are now actually being planned.

For spending intentions in 2024 – although it is a bit early to be clear on that – the positive balance rises to

TABLE 2

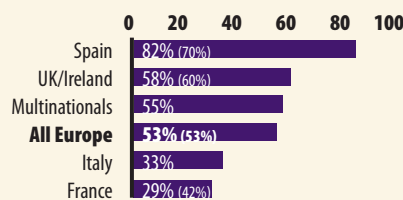
The here and now

How countries differ on key indicators in the survey (all figures in percentages)

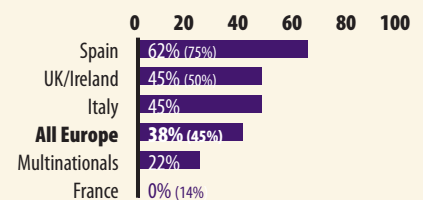
PERCENTAGE OF COMPANIES EXPERIENCING IMPROVING MARKET CONDITIONS (END Q1, 2023)

Spain	83%	(70%)
UK/Ireland	42%	(20%)
All Europe	34%	(28%)
Multinationals	27%	
Italy	8%	
France	0%	(4%)

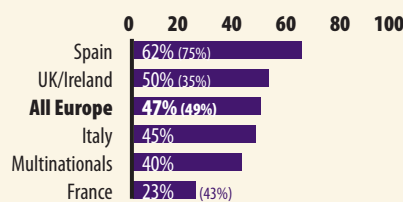
PERCENTAGE REPORTING Q1 2023 GROWTH VS Q1 2022



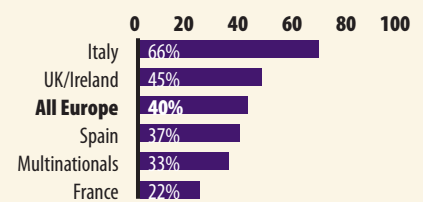
PERCENTAGE WITH INCREASING UTILISATION IN Q1 2023



PERCENTAGE WHICH WILL EMPLOY MORE IN Q2 2023



PERCENTAGE EXPECTING TO INCREASE INVESTMENT IN 2024

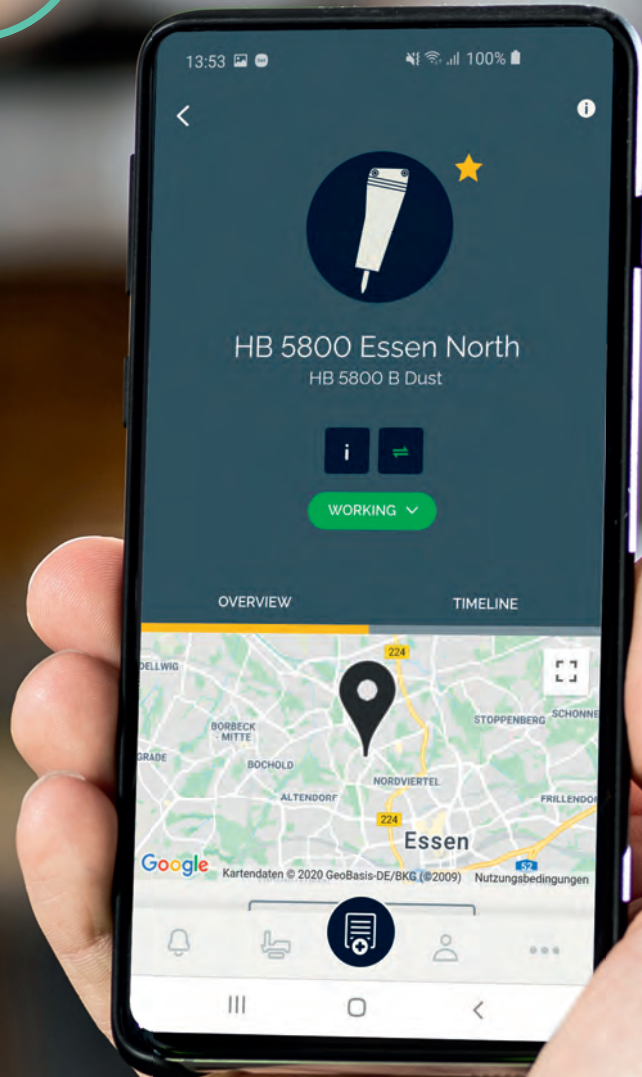




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+34%. Only 7% of respondents were forecasting that their spending next year would be lower.

That 'wait for next year' sentiment is backed up by the responses to the question 'how will things be in 12 months' time?' Here, the positive balance of opinion rose to 39%, the highest since Q1 2022. Only 14% were expecting worse conditions by March 2024, with 53% expecting better to come and 32% anticipating no major change.

**National differences**

Looking at national differences, there seems to be a rather stark difference between Spain and the UK – which are near the top of many of the metrics – and France and Italy, which are near the bottom.

It is worth remembering that sample size for individual countries is rather low, so the findings are definitely in the category of 'anecdotal' rather than 'scientific'. There were insufficient results, for example, to allow us to report meaningfully on the Benelux, Germany or Nordics.

Remarkably, France is at the bottom of every metric that we track. Not a single French company was reporting improving conditions in late March 2023, or seeing utilisation improve, or forecasting higher spending this year. The survey period coincided with social unrest about pension reforms and industrial strikes, so that is bound to have had an impact on business sentiment.

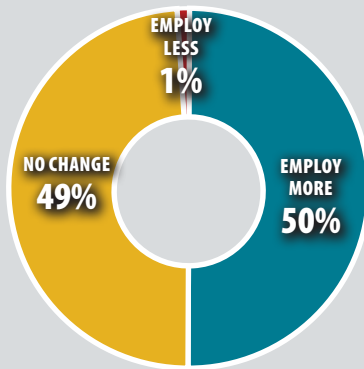
The UK is in a different position and much more positive, relatively speaking, perhaps surprisingly so, given the IMF's forecast that the UK will have the slowest growth economy in Europe this year (it forecasts a 0.6% contraction).

When reading survey results, one has to remember the starting conditions: business sentiment has been

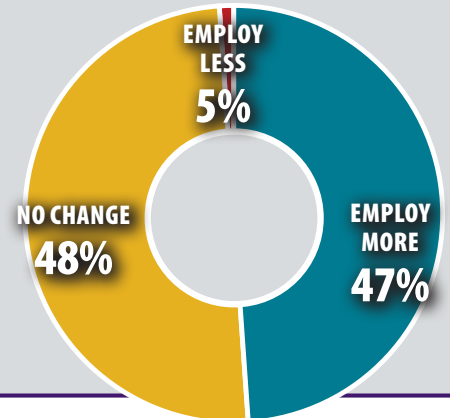
**FIGURE 4**

**EUROPE Employment intentions for next quarter**

Asked end of Q4 2022



Asked end of Q1 2023



relatively low for some time in the UK, but the prospect of lower inflation and a weaker recession than widely anticipated may have led to a healthier view on business prospects.

It is also worth pointing out that multinationals are similar to France and Italy on the confidence stakes. For these bigger companies, there is no hiding from an overall weaker economic environment.

The Q1 survey is therefore revealing not of any dramatic changes that are underway, but of the curious position facing the European rental industry: simultaneously, an easing of certain pressures alongside generally weak economies. **IRN**

**Survey info**

The survey was conducted in the final two weeks of March 2023, with almost 100 rental companies in Europe taking part. IRN would like to thank the rental associations in Europe, including ERA, DLR, ASEAMAC and Assodimi, for their help in distributing the survey.

If you have questions about the survey, please contact IRN Managing Editor, Murray Pollok, E-mail: [murray.pollok@khl.com](mailto:murray.pollok@khl.com)



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# Sharpened focus

**Erwin Claus, CEO of Dutch industrial equipment rental company EQIN tells *IRN* deputy editor Lewis Tyler about the company's core focus areas, expansion strategy and shift towards sustainable solutions.**

**W**hen sitting down via video link with EQIN CEO Erwin Claus, it's clear that he has outlined a specific path of where he wants the industrial equipment rental business to go in the future, both in its geographical footprint and in the services it provides.

Headquartered in Rotterdam, the company provides a range of equipment, such as generators, compressors, welding equipment and lighting towers throughout the Benelux region, where it employs over 250 staff.

Claus, who spent almost a decade with Boels Rental before joining EQIN, has been with the company for eight years, and it would be a fair assessment to say that much has changed in the company in that time.

## New focus

In 2020, Stork, part of Fluor's Diversified Services segment, announced that it was to sell EQIN to Value Enhancement Partners (VE Partners), a Dutch investment company. Claus explained to *IRN* that the divestment had come at the right time for the company.

"We are very thankful that Stork developed EQIN, but there came a natural point in the development of EQIN and the future of Stork. I think it was the right moment to divest EQIN and give it the chance to develop as an agile company on its own feet."

At the time of the announcement, EQIN said the sale would allow it to focus on its key areas and grow as a business. Since then, with investment from VE Partners, the company has implemented several changes, one of which is a sharpened strategy that is aimed at preparing the company for the future by embracing

sustainable equipment, both internally and externally, as well as digital solutions.

Part of this strategy will also see the company move into new headquarters as part of a drive to further growth and professionalisation. That move is expected to take place later this year or early 2024.

Elsewhere, EQIN has continued to invest in its fleet, which Claus says was a key focus for VE Partners once the deal was finalised. "Every year we invest in expanding and renewing our fleet. We have replacement investments and expansion investments, and it was clear to our investor that to let EQIN grow it was important to invest in the company. We are now two and a half years on our own feet and can look back at a successful carve-out."

## Digitalisation and sustainability

A large part of that investment has been spent on sustainable equipment, according to Claus, with sustainability forming part of two key areas in which the company is "fully investing in" due to demand from its customer base.

"We have to invest in more sustainable solutions, that could be electric air compressors, battery packs, diesel driven equipment with Stage V engines, HVO diesel or battery hand tools.

"An internal sustainability project is the 100% electrification of the fleet of vehicles. We make that step together with the market to invest in sustainable solutions."

Although an ongoing pledge, the shift towards sustainable equipment could be seen last year, when EQIN exchanged 60% of its lease cars for fully electric cars as part of its plans to make its fleet more sustainable. This came shortly after it achieved level 3 on the CO2 performance ladder.

Before that, the company had already committed to providing environmentally friendly equipment as part of its rental fleet, and currently offers battery-powered or hybrid equipment from the likes of US manufacturer Milwaukee.

The second key area in which the company is investing in is digitalisation, according to Claus. Shortly after being purchased by VE Partners the company launched Smart, an IoT platform that can monitor the location, condition and use of its equipment remotely. The cloud-based platform allows both the customer and EQIN to see all collected data, enabling them to work together to improve the reliability of its rental fleet.

"We invested in EQIN Smart (telematics) which means you can monitor equipment types such as generator, lighting towers and compressors. From order to pay, you >

“ An internal sustainability project is the 100% electrification of the fleet of vehicles. We make that step together with the market to invest in sustainable solutions. ”

ERWIN CLAUS, CEO, EQIN





As part of its new strategy, EQIN will move from its current headquarters.

have to make it more digital to support customers and make the process more transparent and accessible," Claus revealed.

"With our equipment, we can monitor it from our head office, see what the problem is, the equipment type and see how we can support our customers from a distance and not drive for every repair or maintenance action."

### European expansion

The company operates within the Benelux region, but for some time EQIN has set its sights on expanding into the wider European market, says Claus. "We have branches for our rental company in the Netherlands and Belgium and in a few weeks, we will open our first branch in Germany.

"It is evident that Germany or France is the next step for expansion. Both countries are large rental markets in Europe so there is a lot of potential for us as a company.

"Our big goal? In Western Europe, every industrial professional contributes to a better tomorrow by using our solutions."

Alongside the plans for European expansion, Claus says

**Claus says expansion is planned in Western Europe, with the company opening its first branch in Germany this year.**

the company has outlined a strategy, with mergers and acquisitions at the forefront, that will see it look for other industrial rental companies.

Claus said, "We have an expansion strategy to grow the company organically and through mergers and acquisitions, so we are looking around for other industrial rental companies that fit together with EQIN, and it could be in the countries in which we are active or expand our footprint in new geographical areas."

### Fleet investment strategy

According to Claus, EQIN is formed of what he describes as three core 'pillars': "Equipment solutions, that is our rental pillar. Within welding solutions (the second pillar) we are

the exclusive importer of Fronius Welding equipment for the Netherlands and Belgium. We serve our customers with the total welding package.

"The (third) pillar, 'service solutions,' includes several services; on site locations, 24/7 services, tool management & warehousing solutions and temporary energy, air, light and welding networks at project sites, etc.

"From a market segment perspective, we are focusing on industries like renewables, (petro) chemical, oil and gas, and steel and shipbuilding market segments."

In terms of growth in these areas, Claus says he expects movement with its welding segment through its partnership with Fronius. "We do this with direct sales through our own sales representative, but we also have a dealer network with 10 dealers in the Netherlands and Belgium.

"Currently, we have an expansion strategy to add extra dealers in the Netherlands and Belgium in the coming years."

In terms of expanding its product portfolio within its rental division, Claus says EQIN is focusing more on its core business, with no plans to move into the earthmoving or access equipment sectors.

Moving forward, the plans set in place for EQIN point to a company that is in the midst of a shift in focus, especially from a geographical perspective.

And, while Claus says the focus is on reinforcing what the company do best and not veering from its equipment on offer or industries it serves, you can expect to see significant movement in the European sector in the near future from EQIN.

IRN



EQIN's fleet includes generators, lighting towers and welding equipment.





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by **irdeto**

**There is no doubt where the energy was in the equipment rental industry last year, with North American firms leading the way in revenue growth. Murray Pollok reports.**

# Supercharged North America

## Notes & thanks

IRN again thanks those companies and individuals who contributed information to the survey. If you have comments, or would like to be included next year, please contact the deputy editor, Lewis Tyler. +44 (0)1892 786209 | lewis.tyler@khl.com

Rankings are based on rental revenues for 2022 (or the most recent financial year) and include sales of used fleet and consumables/contractor supplies. Sales of new equipment have been excluded where these constitute a significant and separate part of a company's business, and where we have this information.

- Figures denoted <sup>(EST)</sup> have been estimated by IRN.
- IRN thanks Michael Roth, editor of RER magazine, for some help with US data.
- All revenues have been converted into € using exchange rates as at 31/12/2022, as follows (exchange rates used in last year's survey are given in brackets):

- €1.00 = US\$1.07 (1.14)
- = £0.89 (0.84)
- = A\$1.57 (1.56)
- = C\$1.45 (1.44)
- = JPY141 (130)
- = SEK11.19 (10.26)
- = NOK10.50 (10.02)
- = BRL5.67 (6.33)
- = CNY7.41 (7.22)
- = UAE AED 3.94 (4.18)
- = S\$1.44 (1.53)

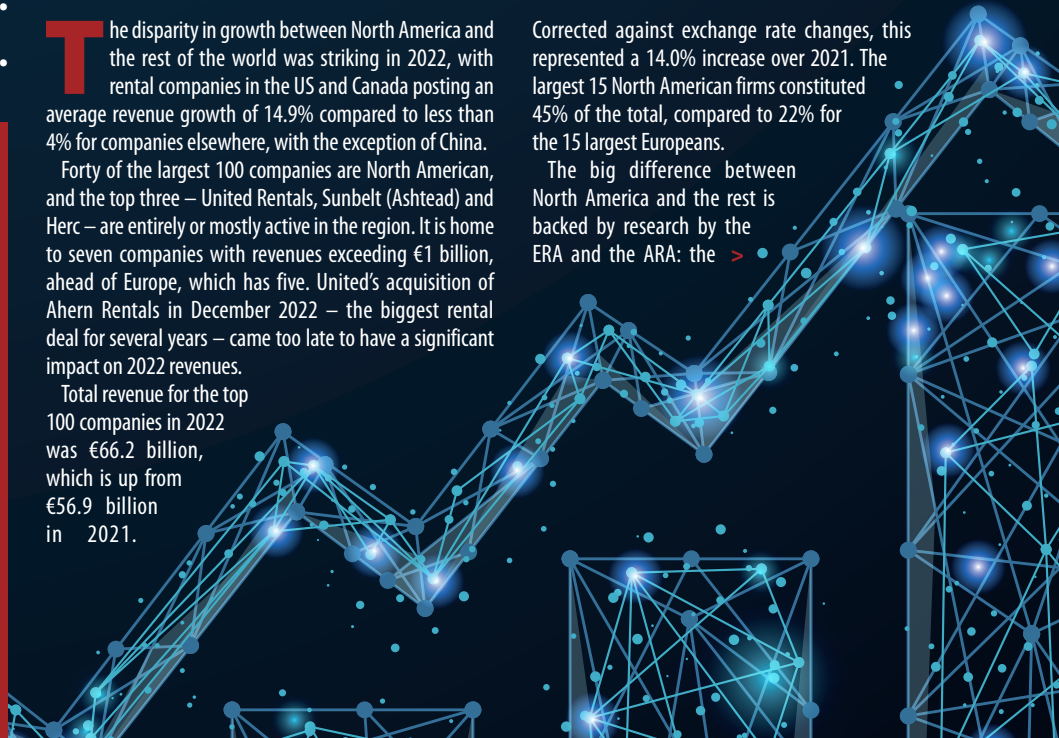
The disparity in growth between North America and the rest of the world was striking in 2022, with rental companies in the US and Canada posting an average revenue growth of 14.9% compared to less than 4% for companies elsewhere, with the exception of China.

Forty of the largest 100 companies are North American, and the top three – United Rentals, Sunbelt (Ashtead) and Herc – are entirely or mostly active in the region. It is home to seven companies with revenues exceeding €1 billion, ahead of Europe, which has five. United's acquisition of Ahern Rentals in December 2022 – the biggest rental deal for several years – came too late to have a significant impact on 2022 revenues.

Total revenue for the top 100 companies in 2022 was €66.2 billion, which is up from €56.9 billion in 2021.

Corrected against exchange rate changes, this represented a 14.0% increase over 2021. The largest 15 North American firms constituted 45% of the total, compared to 22% for the 15 largest Europeans.

The big difference between North America and the rest is backed by research by the ERA and the ARA: the



## What do we measure?

IRN limits its definition of rental to products that are broadly related to the construction industry as well as some sectors of general industry and events. That means we include construction equipment, small tools, portable accommodation, aerial equipment, pumps, shoring equipment, power and temperature control.

This excludes many other rental sectors, including specialist businesses such as medical equipment rental, testing and measurement equipment, and the rental of specialist oil and gas related equipment.

Revenues relating to industrial forklifts are included when they are part of a wider equipment rental business, but companies focusing almost 100% on forklifts are not included.

RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
1 1	<b>UNITED RENTALS</b>	<b>9434</b>	8144	Stamford, Connecticut, US	US, Ca, Europe, Australia, NZ	Construction equipment, tools	1520	24,600	+001 (203) 622-3131 www.unitedrentals.com
2 2	<b>ASHTEAD GROUP</b>	<b>8075</b>	6284	London, UK	US, Ca, UK, Ger, Ire, France, Netherlands	Construction equipment, tools	1,343	23,527	+44 020 7726 9700 www.ashtead-group.com
3 6	<b>HERC RENTALS</b>	<b>2560</b>	1842	Bonita Springs, Florida, US	US, Canada	Construction equipment, tools	350	6400	+1 239 301 1000 www.hercrentals.com
4 4	<b>LOXAM</b>	<b>2403</b>	2200	Paris, France	Europe, Middle East, Braz, Col	Construction equipment, tools	1091	11,800	+33 1 58 440 400 www.loxam.com
5 3	<b>AKTIO HOLDINGS CORP</b>	<b>2303</b>	2349	Tokyo, Japan	Jap, Thai, Sing, Mal, Tai, Ind'sia, Myan	Construction equipment, tool hire, party/events	9487	1080	+81 3 6854 1413 www.aktio.co.jp/en



# IRN 100

RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
6 5	<b>AGGREKO</b>	<b>2001</b>	1900	Glasgow, UK	+80 countries	Power, temperature control and compressor rental	180	6000	+44 141 225 5900 www.aggreko.com
7 7	<b>WILLSCOT MOBILE MINI</b>	<b>2000</b>	1658	Baltimore, US	US, Canada, UK, Mexico	Modular buildings	240	4500	+1 410 931 6000 www.willscot.com
8 9	<b>MODULAIRE</b>	EST <b>1704</b>	1420 EST	London, UK	>25 countries in Eur, NA, ME, Au/NZ, Asia	Portable accommodation/storage storage units	240	5000	+1 410 931 6000 www.modulairegroup.com
9 10	<b>BOELS RENTAL</b>	<b>1470</b>	1304	Sittard, Netherlands	Europe (18 countries)	Construction equipment, tools, party/events, industrial	770	7340	+31 46 459 2159 www.boels.com
10 8	<b>KANAMOTO</b>	<b>1333</b>	1457	Sapporo, Japan	Jap, Chi, HK, Sing, Ind'sia, Thai, Viet, Ph, Mal	Construction equipment, tools	551	3882	+81 11 209 1631 www.kanamoto.co.jp
11 12	<b>HOME DEPOT RENTALS</b>	EST <b>1175</b>	1000 EST	Atlanta, Georgia, US	US, Canada	Construction equipment, tools	1400	8500	+1 770 433 8211 www.homedepotrents.com
12 11	<b>NISHIO RENT ALL</b>	<b>1167</b>	1185	Osaka, Japan	Jap, Mal, Thai, Sing, Viet, Au, Chi	Construction equipment, tools, party/events	484	4551	+81 6 6251 7302 www.nishio-rent.co.jp
13 19	<b>H&amp;E EQUIPMENT SERVICES</b>	<b>1121</b>	965	Baton Rouge, Louisiana, US	US	Construction equipment	102	2500	+1 225 298 5200 www.he-equipment.com
14 16	<b>HORIZON CONSTRUCTION DEVELOPMENT</b>	<b>1065</b>	850	Shanghai, China	China	Construction equipment, aerial platforms	349	4294	+86 400 821 8001 www.hongxinjianfa.com
15 14	<b>KILOUTOU</b>	<b>1018</b>	793	Villeneuve d'Ascq, France	France, Denmark, Germany, Poland, Portugal, Spain, Italy	Construction equipment, tools, power, access, modular, party/events, temperature control	605	6885	+33 359 56 54 00 www.kiloutou-group.com
16 =34	<b>EQUIPMENTSHARE</b>	EST <b>1000</b>	400 EST	Columbia, MD, USA	USA	Construction equipment, tools	150	4100	+1 888 807 3687 www.equipmentshare.com

RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
17 13	<b>NIKKEN CORP</b>	853	877	Tokyo, Japan	Japan	Construction equipment	254	3,197	+81 3 5512 7311 www.rental.co.jp/english
18 15	<b>MAXIM CRANE WORKS</b>	843	800	Wilder, KY, US	US	Cranes and aerial platforms			+1 859 441 7400 www.cranerental.com
19 21	<b>SUNSTATE EQUIPMENT CO</b>	748	614	Phoenix, AZ, US	US	Construction equipment, tools	96	2130	+1 6022752398 www.sunstateequip.com
20 17	<b>TAIYO KENKI RENTAL</b>	669	695	Shizuoka, Japan	Japan	Construction equipment, party/events	122	3019	+81 542 843 111 www.taiyokenki.co.jp
21 23	<b>ZEPELIN RENTAL</b>	666	576	Garching (Munich), Germany	DE, Aus, Cz, Slvka, Dk, Swe	Construction equipment, tools, party/events, logistics, temporary infrastructure	160	1983	+49 (0)89 32 000 220 www.zeppelin-rental.com
22 24	<b>SARENS</b>	651	575	Wolvertem, Belgium	63 countries worldwide	Cranes	890	4636	+32 52 319 319 www.sarens.com
23 22	<b>COATES</b>	640	606	Sydney, Australia	Australia, Indonesia	Construction equipment, tools	160	1936	+61 13 15 52 www.coateshire.com.au
24 27	<b>MATECO</b>	630	469	Munsbach, Luxembourg	Netherlands, Belgium, Luxemburg, Germany, Poland, Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Spain, Switzerland, Chile, Panama, Mexico.	Construction equipment, aerial platforms, forklift trucks, events	160	2600	+32 56 43 42 21 www.mateco.eu
25 37	<b>GROUP MONNOYEUR RENTAL</b>	621	483	Saint Denis, France	France, Be, Pol, Rom, Sp, Port, UK, China	Construction equipment, forklifts			+33 149 226 061 www.monnoyeur.com
26 25	<b>CUSTOM TRUCK ONE SOURCE</b>	618	404	Indiana, US	US, Canada, Mexico	Utility lift trucks and equipment	35	1800	+1 855 637 2672 www.customtruck.com

latter consistently highlighting high growth rates in the US, while the ERA is reporting far more modest expansion.

**Notable rises**

The headline growth figure for North America holds within it some quite dramatic moves. We don't have official figures for EquipmentShare, but believe our estimate of US\$1 billion in rental-related revenues to be reasonable. The company has recently raised more finance through a funding round and is also engaged with its first bond issue, both of which should see it add further rental locations and equipment in 2023/4.

We don't have a good estimate for EquipmentShare's 2021 revenues, and we possibly under-reported in our estimate for that year, which explains its dramatic climb up the table from position 34 to 16.



**United rentals' acquisition of Ahern Rentals came too late in the year to have a major impact on 2022 revenues.**

TABLE 1

**IRN100 REVENUES**

	2022 REVENUES (CURRENCY ADJUSTED)	2022 REVENUES (€ BILLIONS)	2022 % CHANGE (CURRENCY ADJUSTED)	2021 REVENUES	2020 REVENUES
<b>TOP 5</b>	€23.7	€24.8	+13.4%	€20.9bn	€17.5bn
<b>TOP 100</b>	€64.9	€66.2	+14.0%	€56.9bn	€48.1bn

H&E Equipment Services is also a mover, rising to number 13. In recent years the company has been exiting its equipment sales and crane activities to focus on equipment rental. It is a strategy that seems to be paying off.

Among European firms, the generalists Loxam, Boels, Kiloutou and Zeppelin Rental all had years of solid growth, aided in most cases by acquisitions. One suspects that the battle for Europe-wide supremacy between Loxam, Boels and Kiloutou will be an interesting one, with the added spice of United Rentals now having a foothold in the region.

Renta Group, based in Finland, is the fastest growing company in the list – through acquisitions and organic



TABLE 2

## IRN100 REGIONAL TOP 15

TOP 15 USA-BASED		
	COMPANY	REVENUES IN 2022 (€)
1	UNITED RENTALS	9434
2	ASSTEAD GROUP	8075
3	HERC RENTALS	2560
4	WILLSCOT MOBILE MINI	2000
5	HOME DEPOT RENTALS	1175 <sup>EST</sup>
6	H&E EQUIPMENT SERVICES	1121
7	EQUIPMENTSHARE	1000 <sup>EST</sup>
8	MAXIM CRANE WORKS	843
9	SUNSTATE EQUIPMENT CO	748
10	CUSTOM TRUCK ONE SOURCE	618
11	SAMMONS INDUSTRIAL (BRIGGS EQUIPMENT & SITEPRO RENTALS)	448
12	ATLAS COPCO SPECIALTY RENTAL DIV.	453
13	MCGRATH RENTCORP	432
14	ALL FAMILY OF COMPANIES	380 <sup>EST</sup>
15	SOENERGY INTERNATIONAL	320 <sup>EST</sup>
		<b>€29.6 billion</b>

TOP 15 EUROPE-BASED		
	COMPANY	REVENUES IN 2022 (€)
1	LOXAM	2403
2	AGGREKO	2001
3	MODULAIRE	1704 <sup>EST</sup>
4	BOELS RENTAL	1470
5	KILOUTOU	1018
6	ZEPELIN RENTAL	666
7	SARENS	651
8	MATECO	630
9	GROUP MONNOYEUR RENTAL	621
10	MAMMOET HOLDING BV	600 <sup>EST</sup>
11	TOI TOI & DIXI GROUP	560 <sup>EST</sup>
12	HKL BAUMASCHINEN	490
13	SPEEDY HIRE	489
14	RENTA GROUP	421
15	VP PLC	400 <sup>EST</sup>
		<b>€14.4 billion</b>

TOP 15 ASIA		
	COMPANY	REVENUES IN 2022 (€)
1	AKTIO HOLDINGS CORP	2303
2	KANAMOTO	1333
3	NISHIO RENT ALL	1167
4	HORIZON CONSTRUCTION DEVELOPMENT	1065
5	NIKKEN CORP	853
6	TAIYO KENKI RENTAL	669
7	COATES	640
8	EMECO	480
9	SHANGHAI PANGYUAN CONSTRUCTION EQUIPMENT & ENGINEERING	480
10	ZHEJIANG HUATIE EMERGENCY EQUIPMENT SCIENCE & TECHNOLOGY	443
11	HITACHI CONSTRUCTION MACHINERY JAPAN	356
12	AJ NETWORKS	350
13	KENNARDS HIRE	332
14	TAT HONG	320
15	XCMG GUANLIAN RENTAL	275
		<b>€11.0 billion</b>

Note: Revenues for each company represent their totals, and not restricted to region.

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RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
27 =30	<b>MAMMOET HOLDING BV</b>	EST 600	500 EST	Utrecht, Netherlands	Worldwide	Crane rental	85	4200	+31 10 204 24 24 www.mammoet.com
28 =30	<b>TOI TOI &amp; DIXI GROUP</b>	EST 560	450 EST	Ratingen, Germany	27 countries worldwide	Portable toilets	220	4400	+49 (0)800 555 989 078 www.toitoidixi.de
29 29	<b>HKL BAUMASCHINEN</b>	490	450	Hamburg, Germany	Germany, Austria, Po	Construction equipment, tools	170	1647	+49 40 538021 www.hkl24.com
30 26	<b>SPEEDY HIRE</b>	489	455	Newton-le-Willows, UK	UK & Ireland, ME, Kaz	Construction equipment, tools, temperature control	200	3300	+44 1942720000 www.speedyservices.com
=31 36	<b>EMECO</b>	480	397	Osborne Park, Australia	Australia	Heavy construction, mining	9	1400	+61 8 9420 0222 www.emecogroup.com
=31 18	<b>SHANGHAI PANGYUAN CONSTRUCTION EQUIPMENT &amp; ENGINEERING</b>	480	646	Shanghai, China	China, Mal, Phil, Ind'sia, Camb	Cranes, construction equipment	41	3033	+86 02132180088 www.pangyuan.com
33 33	<b>SAMMONS INDUSTRIAL (BRIGGS EQUIPMENT &amp; SITEPRO RENTALS)</b>	448	406	Dallas, TX, US	US, Mex, UK, Rep of Ireland	Construction equipment, tools, access equipment	111	4100	+1 214 617 0000 www.sammonsindustrial.com
34 32	<b>ATLAS COPCO SPECIALTY RENTAL DIVISION</b>	453	413	Boom, Belgium	155 countries worldwide	Compressors and generators	138	1350	+1 281 454 2200 www.atlascopcorental.com
35 40	<b>ZHEJIANG HUATIE EMERGENCY EQUIPMENT SCIENCE &amp; TECHNOLOGY</b>	443	359	Hangzhou, China	China	Equipment/Construction Plant	192	3348	+86 0571 86038116 www.zjhuatie.cn
36 41	<b>MCGRATH RENTCORP</b>	432	346	Livermore, California, US	US, Canada	Construction equipment, modular, electronic test equipment, tanks			+1 925 606 9200 www.mgrc.com
37 50	<b>RENTA GROUP</b>	421	275	Vantaa, Finland	Finland, Sweden, Norway, Denmark, Poland, Estonia, Latvia and Lithuania	Construction equipment, tools, weather protection, scaffolding, modular, site services	136	1500	+358 40 511 6445 www.renta.com

TABLE 3

## IRN100 REGIONAL TRENDS

	NUMBER OF COMPANIES									
	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
<b>N AMERICA</b>	40	41	42	43	38	34	33	35	35	34
<b>EUROPE</b>	35	38	36	37	39	41	42	41	39	42
<b>JAPAN</b>	8	8	10	9	10	10	9	10	10	10
<b>ASIA (EXC JAPAN)</b>	7	5	5	5	4	3	4	5	5	6
<b>AUSTRALIA</b>	6	4	5	3	5	5	3	3	2	2
<b>SOUTH AMERICA</b>	2	2	2	3	3	3	5	3	3	3
<b>MIDDLE EAST</b>	2	2	0	0	1	4	4	3	6	3
<b>AFRICA</b>	0	0	0	0	0	0	0	0	0	0

growth – and although still only at position 50 (and 14 in Europe) you wouldn't bet against it rising many places by the time of next year's survey.

Specialist rental players – whether in power, access or temporary accommodation – continue to make their mark. Three of the top 10 – Aggreko, WillScot Mobile Mini and Modulaire – are such companies, and there are many more sprinkled throughout the list, including Australia's National Pump & Energy (NPE), which makes the list for the first time just as it is being acquired by Atlas Copco as an addition for its Specialty Rentals business.

Japan's rental companies grew modestly in 2022 and they were hindered – at least in terms of the IRN100 survey – by a weaker Yen against the Euro, which saw their

TABLE 4

## IRN100 DROP OUTS

COMPANY	REASON
<b>AHERN RENTALS</b>	Acquired by United Rentals
<b>GSV MATERIELUDLEJNING</b>	Acquired by Kiloutou
<b>HASTINGS DEERING</b>	
<b>AINSCOUGH CRANE HIRE LTD</b>	

TABLE 5

## IRN100 NEW ENTRANTS

RANK	COMPANY	REVENUES
43	<b>AJ NETWORKS</b>	Under-reported in previous survey.
54	<b>XCMG Guanglian Rental</b>	New entry
=71	<b>NATIONAL PUMP &amp; ENERGY</b>	Being acquired by Atlas Copco
87	<b>REIC</b>	Making acquisitions
88	<b>XCMG</b>	OEM-owned rental business in China



RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
=38 =34	<b>LIEBHERR MIETPARTNER</b>	400	400	Ludwigshafen, Germany	Germany, France, Austria, UK, Switzerland	Construction equipment	130	250	+49 6237 400 610 www.liebherr.com
=38 28	<b>VP PLC</b>	EST 400	458 EST	Harrogate, UK	UK, Ireland, DE, UAE, S America, Sing, Aus	Construction equipment, tools			+44 (0)1423 533 400 www.vpplc.com
40 38	<b>ALL FAMILY OF COMPANIES</b>	EST 380	370 EST	Independence, OH, US	US, Canada	Cranes, construction equipment, specialised transport	33	1500	+1 216 524 6550 www.allcrane.com
41 39	<b>HSS HIRE</b>	374	361	Manchester, UK	UK/Ireland	Construction equipment, tools	105	1500	+44 20 82603100 www.hss.com/hire
42 37	<b>HITACHI CONSTRUCTION MACHINERY JAPAN</b>	356	385	Saitama, Japan	Japan	Construction equipment, tools			+81 (0) 48 933 5509 www.hitachi-kenki.co.jp
43 42	<b>MEDIACO</b>	354	340	Marseille, France	France, Germany, North Africa	Cranes, access platforms, industrial services, logistic and transport	80	2200	+33 4 9103 8191 www.mediaco-groupe.com

Euro revenues artificially lowered compared to 2021.

China's rental companies continue to expand at remarkable rates, although perhaps there are signs of a slight cooling down. Most of these companies are renting aerial platforms, but there is now one company, XCMG Guanglian Rental, renting general construction equipment. It is a subsidiary of Chinese construction equipment manufacturer XCMG.

**Fleet spending**

As far as capital investment in fleet is concerned, 2022 was another good year for the equipment suppliers. The top 25 investors in the list (who are not necessarily the largest 25 companies) collectively invested €12.2 billion in new equipment in 2022, which was a 47% increase on 2021. That figure, which represents gross capital spending before accounting for sales of used fleet, represents a continuation of the 'catching up' process following the pandemic years.

The €12.2 billion, and the increase it represents over 2021, is all the more remarkable given the supply chain > problems facing OEMs. Of course, the increase reflects the

TABLE 6

**IRN100 GROWTH LEAGUE**

RANK	COMPANY	% GROWTH
1	RENTA GROUP	53%
2	EQUIPMENTSHARE	50% EST
3	CUSTOM TRUCK ONE SOURCE	44%
4	MATECO	34%
5	HERC RENTALS	32%
6	COOPER EQUIPMENT RENTALS	31%
=7	KILOUTOU	29%
=7	FLANNERY PLANT HIRE	29%
=7	WARREN CAT	29%
10	BYRNE EQUIPMENT RENTAL	28%
11	MCGRATH RENTCORP	27%
12	FINNING INTERNATIONAL	26%
13	HORIZON CONSTRUCTION	25%
14	ZHEJIANG HUATIE EMERGENCY EQUIPMENT	24%
15	KENNARDS HIRE	23%

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RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
44 NEW	<b>AJ NETWORKS</b>	EST 350	374 EST	Seoul, South Korea	South Korea, USA, Saudi Arabia, Vietnam, Poland, Hungary	Equipment/Construction Plant	n/a	Over 500	+82 2 6363 9975 http://www.ajnet.co.kr
45 51	<b>KENNARDS HIRE</b>	332	270	Sydney, Australia	Australia, New Zealand	Construction equipment, tools	192	1813	+61 2 8805 6100 www.kennards.com.au
=46 =44	<b>TAT HONG</b>	EST 320	300 EST	Singapore	Sing, Aust, Chi, Mal, Thai, Ind'sia, HK, Viet, Myan, PNG	Cranes, tower cranes, construction equipment	35	1700	+65 67090300 www.tathong.com
=46 =44	<b>SOENERGY INTERNATIONAL</b>	EST 320	300 EST	Miami, Florida, US	33 countries worldwide	Power rentals	<10	1100	+1 305 593 5085 www.soenergy.com
48 49	<b>RIWAL HOLDING GROUP</b>	314	278	Dordrecht, Netherlands	NL, Bel, Dk, Swe, No, UK, DE, Fr, Po, Sp, Slo, Hu, UAE, Qa, Ind, Kaz	Aerial platforms, power, telehandlers	60	1349	+31 88 618 1800 www.rival.com
49 52	<b>TOROMONT INDUSTRIES</b>	311	269	Concord, Vaughan, Canada	Canada	Construction equipment	148	6500	+1 416 667 5511 www.toromont.com
50 47	<b>ADAPTEO</b>	EST 300	290 EST	Solna, Sweden	Swe, Fin, No, Dk, DE, NL, Lith	Portable accommodation	20	600	+358 10 661 5500 www.adapteogroup.com
51 53	<b>ALTA EQUIPMENT</b>	292	263	Michigan, US	US	Construction equipment, tools	64	1000	+1 844 462 2582 www.altaequipment.com
52 48	<b>PORTAKABIN</b>	EST 290	285 EST	York, UK	UK, Ireland, NL, Be, Fr, Lux, DE	Accommodation rental, events	106	900	+44 01904 611655 www.portakabin.com

TABLE 7

## IRN100 CAPITAL EXPENDITURE – TOP 25 INVESTORS

RANK	COMPANY	GROSS CAPITAL EXPENDITURE 2021 (€ MILLION)
1	<b>UNITED RENTALS</b>	<b>3,170</b>
2	<b>ASHTeAD GROUP</b>	<b>2,457</b>
3	<b>HERC RENTALS</b>	<b>1091</b>
4	<b>H&amp;E EQUIPMENT SERVICES</b>	<b>471</b>
5	<b>HORIZON CONSTRUCTION DEVELOPMENT</b>	<b>435</b>
6	<b>WILLSCOT MOBILE MINI</b>	<b>371</b>
=7	<b>SUNSTATE EQUIPMENT CO</b>	<b>326</b>
=7	<b>LIEBHERR MIETPARTNER</b>	<b>326</b>
9	<b>CUSTOM TRUCK ONE SOURCE</b>	<b>318</b>
10	<b>AGGREKO</b>	<b>309</b>
11	<b>NISHIO RENT ALL</b>	<b>296</b>
12	<b>SAMMONS INDUSTRIAL (BRIGGS EQUIPMENT &amp; SITEPRO RENTALS)</b>	<b>282</b>
13	<b>ZEPPELIN RENTAL</b>	<b>275</b>
14	<b>KILOUTOU</b>	<b>234</b>
15	<b>MATECO</b>	<b>220</b>
16	<b>LOXAM</b>	<b>211</b>
17	<b>GROUP MONNOYEUR RENTAL</b>	<b>206</b>
18	<b>ALTA EQUIPMENT</b>	<b>175</b>
19	<b>FINNING INTERNATIONAL</b>	<b>167</b>
20	<b>TESYA SPA</b>	<b>165</b>
21	<b>FLANNERY PLANT HIRE</b>	<b>163</b>
22	<b>NIKKEN CORP</b>	<b>142</b>
23	<b>SHANGHAI PANGYUAN CONSTRUCTION EQUIPMENT &amp; ENGINEERING</b>	<b>140</b>
24	<b>TOROMONT INDUSTRIES</b>	<b>137</b>
25	<b>RENTA GROUP</b>	<b>132</b>
	<b>2022</b>	<b>€12.2 BILLION +47%</b>
	<b>2021</b>	<b>€8.3 BILLION</b>

Note: not all IRN100 companies supplied CapEx data.

higher cost of equipment, but it still represents a big rise over 2021. Imagine what the figure might have been if there were no constraints on supply.

It is worth also saying a few words about some companies that are present in the list, but not explicitly. Sumitomo Corp in Japan, for example, has long owned the Taiyo Kenki rental business in its home country, but it also owns Sunstate Equipment in the US, KRents in Western Canada (through its Canadian business SMS Equipment) and Aver Asia, the South East Asian access rental specialist. Consider these businesses together and Sumitomo becomes a very big rental owner.

Likewise, Malaysian-based Caterpillar dealer Sime Darby operates several rental businesses in the region, most notably Hastings Deering in Australia (which is just outside the top 100) and Onsite Rental Group, a major player in Australia's rental sector, which it has recently acquired. Onsite is ranked 71 in the list. That acquisition is a signal by Sime Darby that it intends to be a significant player in rental.

PHOTO: MOXION POWER



Sunbelt Rentals has purchased more than 600 MP-75/600 mobile battery units from Moxion Power.



RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS STAFF		CONTACT DETAILS
		2022	2021						
53 57	<b>MUSTANG CAT</b>	EST 280	230 EST	Houston, Texas, US	US	Construction equipment	11	120	+1 800 256 1001 www.mustangcat.com
54 NEW	<b>XCMG GUANGLIAN RENTAL</b>	275		Xuzhou, China	China	Aerial work platforms, tower cranes, construction equip	608	150	+15365889712 www.xcmg.com/en-ap
55 56	<b>GAP GROUP</b>	270	234	Glasgow, UK	UK	Construction equipment, tools, Plant, Tools, Lifting, Welfare, Trenching & Shoring, Survey & Safety, Non-Mechanical Plant, Pumps	175	2000	+44 141 225 4600 www.gap-group.co.uk
56 55	<b>KOMATSU RENTAL</b>	EST 260	260 EST	Yokohama, Japan	Japan	Construction equipment			+81 45 274 3337 www.komatsu-rental.co.jp
57 54	<b>RENT CORP</b>	251	261	Shizuoka-shi, Japan	Japan, Thailand	Construction equipment	62	1102	+81 54 265 2201 www.rent.co.jp
58 =58	<b>TESYA SPA</b>	245	210	Vimodrone, Italy	It, Sp, Po, Cro, Slo, Serb, Mont, Alb, Kos, Mac, Bos.	Construction equipment, tools, party/events, lifting, trucks	95	350	+39 (0)2 2740 2641 www.tesya.com
59 60	<b>UPERIO</b>	235	207	Paal-Beringen, Belgium	Fr, Be, Lux, NL, DE, UK, Swe, US	Cranes	30	650	+32 11 45 09 50 www.uperio-group.com
60 =63	<b>FLANNERY PLANT HIRE</b>	232	180	London, UK	UK	Construction equipment, Operated Plant Hire	7	457	+44 (0)208 900 9290 www.flanneryplanthire.com
61 80	<b>PEINEMANN MOBILIFT GROEP</b>	EST 230	210 EST	Rotterdam, Netherlands	NL, DE, Rom, Po, Ivory Cst, Om, Gha	Cranes, aerial platforms	12	950	+31 10 295 5000 www.peinemann.nl
62 =58	<b>COLLÉ RENTAL &amp; SALES</b>	224	190	Sittart, The Netherlands	Europe	Construction equipment, aerial platforms, events, tool hire	19	700	+31 (0)46 4574 100 www.colle.eu
63 62	<b>COOPER EQUIPMENT RENTALS</b>	219	167	Mississauga, Ontario, Canada	Canada	Construction equipment, tools	62	950	+1 800 315 COOP www.cooperequipment.ca
64 71	<b>XYLEM WATER SOLUTIONS</b>	213	173	Rye Brook, US	Worldwide	Pump rentals			0845 707 8012 www.xylen.com
65 65	<b>RING POWER</b>	210	180	St Augustine, FL, US	US	Construction equipment, cranes	25	500	+1 904 737 7730 www.ringpower.com
66 86	<b>MILLS LOCAÇÃO, SERVIÇOS E LOGÍSTICA S.A.</b>	209	124	São Paulo, Brazil	Brazil	Aerial platforms, telehandlers	55	1953	+55 0800 705 1000 www.mills.com.br
67 73	<b>FINNING INTERNATIONAL</b>	205	163	Vancouver, Canada	Canada, UK, Ireland, Chile, Arg, Bol	Construction equipment, power	50	750	+1 604 691 6444 www.finning.com
=68 =63	<b>RED-D-ARC WELDERENTALS</b>	EST 200	190 EST	Grimsby, Canada	US, Ca, Mex, UK, NL, Fr, UAE, DE	Welding/power.	70	700	+1 905 643 7877 www.red-d-arc.com
=68 66	<b>LOU-TEC</b>	EST 200	180 EST	Quebec, Canada	Canada	Construction equipment, aerial platforms, forklift trucks, power tools	33	500	+1 514 356 0047 www.loutec.com
=68 72	<b>ZHONGNENG UNITED DIGITAL TECHNOLOGY CO LTD</b>	EST 200	166 EST	Nanjing, China	China	Aerial platforms	151	2012	+86 024 85711611 www.znlh.com
=71 NEW	<b>NATIONAL PUMP &amp; ENERGY</b>	192	160	Birtinya, Australia	Australia	Pumps, power, air	13	420	+61 (0)7 5438 4300 www.nationalpump.com.au

RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
=71 =74	<b>ONSITE RENTAL GROUP</b>	<b>192</b>	160	Sydney, Australia	Australia	Construction equipment, power	39	500	+61 134040 www.onsite.com.au
73 82	<b>LAMBERTSSON</b>	<b>191</b>	183	Förlöv, Sweden	Sweden	Construction equipment	33	560	+46 431 89300 www.lambertsson.com
=74 82	<b>TNT CRANE &amp; RIGGING</b>	EST <b>190</b>	175 EST	Houston, US	US, Canada	Crane and rigging equipment	40	1500	+1 800 799 2505 www.tntcrane.com
=74 67	<b>CARRIER RENTAL SYSTEMS</b>	EST <b>190</b>	170 EST	West Drayton, UK	UK, US, DE, Fr, NL, Po, Sing	Cooling equipment, pumps, generators, party/events			+44 (0)1372 220169 www.carrierrental systems.co.uk
=74 69	<b>HOLT CAT</b>	EST <b>190</b>	155 EST	San Antonio, Texas, US	US	Construction equipment			+1 855 465 8228 www.holtcat.com
77 76	<b>GAM</b>	<b>187</b>	168	Granda, Asturias, Spain	Sp, Por, Mor, S Arabia, Mex, Chile, Pe, Col, Dom Rep	Aerial platforms, power, material handling, events	80	1300	+34 900 230 022 www.gamrentals.com
78 70	<b>SELECT PLANT HIRE</b>	<b>175</b>	171	Dartford, UK	UK, Australia	Construction equipment, tools, tower cranes	6	600	+44 (0)1322 732 732 www.selectplanthire.com
=79 68	<b>KIRBY SMITH MACHINERY</b>	EST <b>165</b>	135 EST	Oklahoma City, Oklahoma, US	US	Construction equipment			+1 73127-6590 www.kirby-smith.com
=79 =77	<b>KELLY TRACTOR</b>	EST <b>165</b>	135 EST	Miami, Florida, US	US	Construction equipment, tools			+1 305 592 5360 www.kellytractor.com
81 =77	<b>EQUIPMENT DEPOT</b>	EST <b>160</b>	130 EST	Texas, US	North America	Construction equipment, access equipment	50	850	(+1)713 365 2547 www.eqdepot.com
=82 83	<b>OHIO CAT</b>	EST <b>155</b>	125 EST	Ohio, US	US	Construction equipment			+1 440 526 6200 www.ohiocat.com
=82 =84	<b>WAGNER CAT</b>	EST <b>155</b>	125 EST	Aurora, Colorado, US	US	Construction equipment, tools			+1 877 654 1237 www.wagnerequipment.com
84 =84	<b>WARREN CAT</b>	<b>151</b>	110	Texas, US	US	Construction equipment, power			+1 432 571 4200 www.warrencat.com
=85 =87	<b>CLEVELAND BROTHERS EQUIPMENT CO</b>	EST <b>150</b>	120 EST	Murrysville, PA, US	US	Construction equipment			+1 866 551 4602 www.clevelandbrothers.com
=85 =87	<b>MACALLISTER CAT</b>	EST <b>150</b>	120 EST	Indianapolis, Indiana, US	US	Construction equipment			+1 317 545 2151 www.macallister.com

Sammons Industrial, at position 33, the privately owned US business which runs the Briggs Equipment and Sitepro rental companies, is another fast-growing company investing heavily in its fleets. With Sitepro, it is building a new rental company after the split-out from Briggs, and in the UK and Ireland it is acquiring both access rental and forklift dealerships.

### Biggest getting bigger

What does the survey tell us about rental consolidation? The ARA estimated the value of the North American rental industry at around US\$60 billion (€56 billion). The top 15 North American's have total revenues of around €30 billion, so they represent 50% of the market. The top five have a 42% share of the North American total.

For Europe, if the rental market is value at around €27.5 billion in 2022 (based on ERA figures), then the largest 15 European companies have a share of more than 50%. The market share of the top five is 31%. There is clearly room for further consolidation at the very upper end of the market. >

TABLE 8

## IRN100 TOP 10 GLOBAL PLAYERS

RANK	COMPANY	REVENUES (€ MILLION)	COUNTRIES
1	<b>UNITED RENTALS</b>	<b>9434</b>	US, Ca, Europe, Australia, NZ
2	<b>ASHTREAD GROUP</b>	<b>8075</b>	North America, UK
3	<b>LOXAM</b>	<b>2403</b>	Europe, Middle East, Braz, Col
4	<b>AGGREKO</b>	<b>2280</b>	+80 countries
5	<b>MODULAIRE</b>	<b>1704</b>	Europe, Asia Pacific
6	<b>SARENS</b>	<b>651</b>	>25 countries in Eur, NA, ME, Brazil, Au/NZ, Asia
7	<b>MAMMOET HOLDING BV</b>	<b>600</b>	63 countries worldwide
8	<b>TOI TOI &amp; DIXI GROUP</b>	<b>560</b>	Worldwide
=8	<b>SPEEDY HIRE</b>	<b>489</b>	UK, Middle East
10	<b>SAMMONS INDUSTRIAL (BRIGGS EQUIPMENT &amp; SITEPRO RENTALS)</b>	<b>448</b>	USA, UK, Ireland



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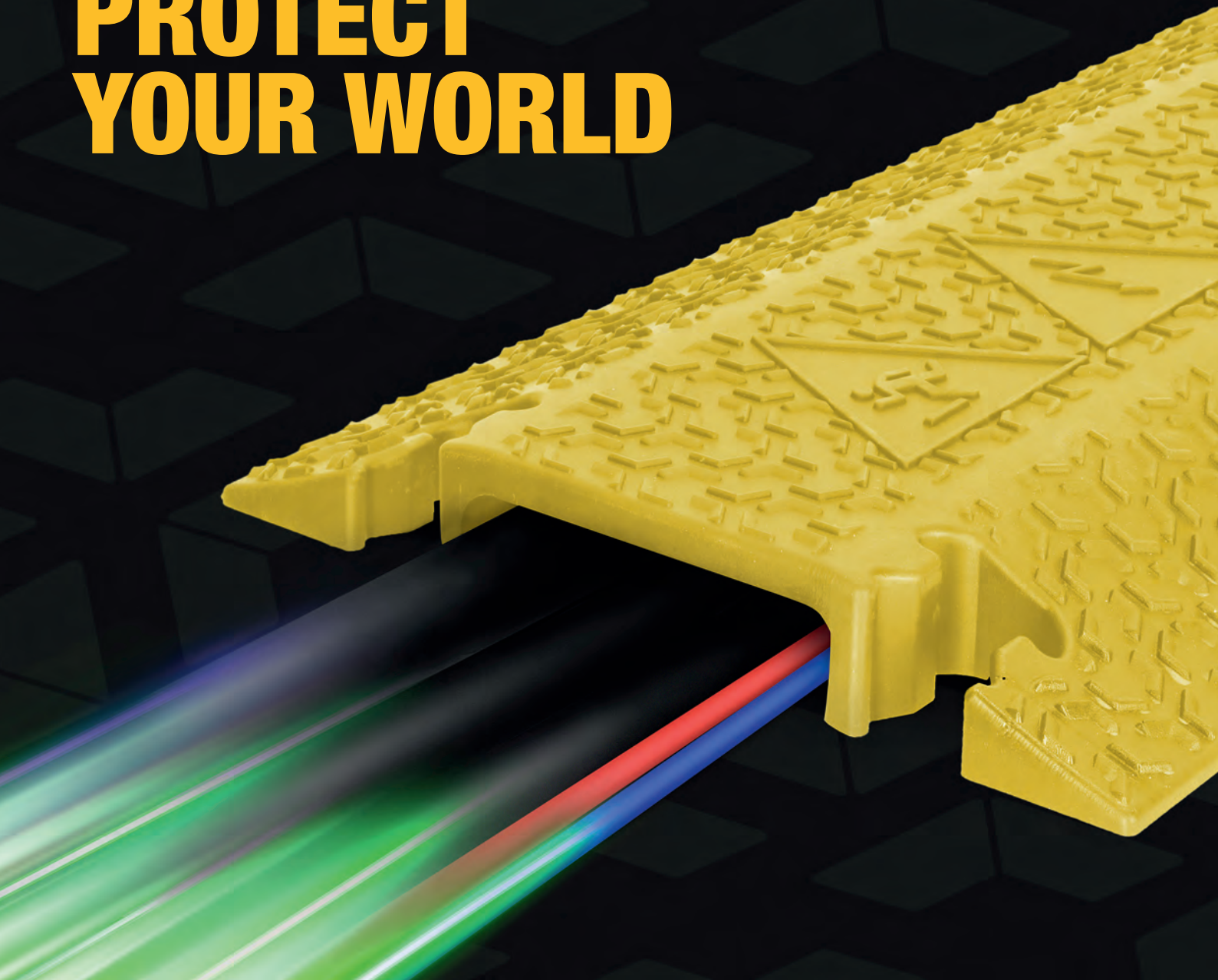
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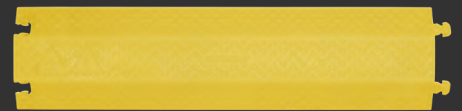
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RANK '23 '22	COMPANY	REVENUES (EUROS)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		2022	2021				DEPOTS	STAFF	
87 NEW	<b>REIC</b>	<b>146</b>		Miami, Florida, US	US and Canada	Equipment/Construction Plant, tool hire, HVAC	50	500	+1 786 238 7313 reicorporation.com
88 61	<b>APR ENERGY</b>	<b>144</b>	201	Jacksonville, Florida, US	Global	Power			+1 (904) 223 8488 www.aprenergy.com
89 93	<b>BLANCHARD CAT</b>	EST <b>140</b>	115 EST	South Carolina, US	US	Construction equipment			+1 844 252 6242 www.blanchardmachinery.com
90 92	<b>BOOM LOGISTICS</b>	<b>137</b>	117	Melbourne, Australia	Australia	Cranes, aerial platforms	14	800	+61 3 92072500 www.boomlogistics.com.au
91 91	<b>MADISA CAT</b>	<b>136</b>	118	Monterrey, Mexico	Mexico	Construction equipment, events, mining	75+		+52 81 8400 2000 www.madisa.com
=92 =87	<b>SIMS CRANE &amp; EQUIPMENT CO</b>	EST <b>130</b>	120 EST	Tampa, Florida, US	US	Cranes, access equipment, forklifts			+1 813 626 8102 www.sims Crane.com
=92 =87	<b>CAROLINA CAT</b>	EST <b>130</b>	120 EST	Charlotte, North Carolina, US	US	Construction equipment			+1 704 596 6700 www.catrentalstore.com/ carolina/en_US/home.html
=92 100	<b>BYRNE EQUIPMENT RENTAL</b>	<b>130</b>	102	Dubai, UAE	UAE, Oman, S Arabia, Kuw, Bahrain	Construction equipment, party/events, oil and gas onshore and offshore, Manufacturing & Logistics, Marine & Ports, Retail & Commercial, Defence & Military	18	1500+	+971 44 544 800 www.bymerental.com
95 =96	<b>WORLDWIDE GROUP</b>	EST <b>125</b>	110 EST	Denver, Colorado, US	US	Construction equipment	10	200	+1 888 997 3687 www.wwmach.com
96 98	<b>SALTI</b>	<b>117</b>	106	Marcq en Baroeul, France	France	Construction equipment, tool hire, parties/events, electric power, aerial platforms	44	450	+33 (0)3 20 92 92 92 www.salti.fr
=97 95	<b>AVESCO RENT GROUP</b>	<b>115</b>	110	Puidoux, Switzerland	Switz, Est, Lat, Lith, Fi	Construction equipment, tools, party/events, Mobile Construction, Temperature Control, Water Treatment)	37	190	+41 (0)21 946 0061 www.avescorent.ch
=97 =96	<b>JEWSON TOOL HIRE</b>	EST <b>115</b>	110 EST	Coventry, UK	UK	Tool hire			+44 (0) 2476 438 400 www.jewson.co.uk/tool-hire
99 101	<b>PRANGL HOLDING</b>	EST <b>114</b>	102	Vienna, Austria	Europe	Construction equipment	17	670	+43 5 0995 11000 www.prangl.a
100 =105	<b>KOREA RENRAL CORP</b>	EST <b>110</b>	95 EST	South Africa, Saudi Arabia, Vietnam	Seoul, South Korea	Construction equipment	8	177	+82 1899 3945 www.korearental.co.kr



Sitepro in the US is part of the Sammons Industrial business and a sister company to Briggs.

What about when the rental market is considered globally? Nobody compiles consistent statistics for the global market, but if we add together Europe and North America and make estimates for Japan (€10 billion), South America (€1 billion), Middle East (€1 billion), and rest of Asia and Australia (€5 billion), then we get to a total of €100 billion. That's a number to be taken as indicative rather than definitive.

That implies that the IRN100 companies represent around 65% of the total, and the top five just short of a quarter of the global market. Here, of course, there is room for far greater consolidation. Although there are many rental companies with operations in several continents, >



IRN has estimated EquipmentShare's 2022 revenues at US1 billion. It is one of the fastest growing rental businesses in the world.

apart from some crane companies (Sarens and Mammoet), there is only one major company, Aggreko, that can be said to have a meaningful global spread of revenues. That will surely change.

What may not change, at least in the short term, is the dominance of North American companies in the list. Everything is bigger in the US, of course, and their rental companies are no exception.

**IRN**

## Extended version

A more detailed look at this year's IRN100 survey – The IRN100 Extended Top list – will be available in the coming months from the KHL.com Information Store (<https://khl-infostore.com>).

The extended version will include commentary on each of the companies in the list as well as extra graphs analysing trends.

TABLE 9

## IRN100 NEAR MISSES

RANK	COMPANY	REVENUES (€ MILLION)	COUNTRIES
101	PRANGL HOLDING	113	Vienna, Austria
=102	ACCES INDUSTRIE	110 <sup>EST</sup>	Tonneins, France
=102	AMECO	110 <sup>EST</sup>	Greenville, SC, US
=102	RENTAL SOLUTIONS & SERVICES (RSS)	110 <sup>EST</sup>	Dubai, UAE
105	HASTINGS DEERING	109	Archerfield, QLD, Australia
=106	SK RENTAL	108	Santiago Chile
=106	AINSCOUGH CRANE HIRE LTD	108	Wigan, UK
108	MOLLO	106	Alba, Italy
109	STEPHENSON'S RENTAL SERVICES	105 <sup>EST</sup>	Mississauga, Ontario, Canada
110	GLOBAL PUMP	98	Davison, USA
111	UTLEIECOMPAGNIET	97	Lillestrøm, Norway
112	NORDIC CRANE	96	Halden, Norway
=113	ANDREWS SYKES	95 <sup>EST</sup>	Wolverhampton, UK
=113	SKYWORKS	95 <sup>EST</sup>	Buffalo, New York, US
=113	LOCAR	95	Guarhulhos
=113	PEKKANISKA GROUP	95 <sup>EST</sup>	Vantaa, Finland
117	NIXON HIRE	92	Newcastle, UK
=118	SELWOOD	90	Eastleigh, UK
=118	NATIONAL TRENCH SAFETY	90 <sup>EST</sup>	Houston, USA
=120	ARDENT HIRE SOLUTIONS	85	Bedford, United Kingdom
=120	ADMAR SUPPLY	85 <sup>EST</sup>	Rochester, New York, US
121	CROSS-COUNTRY INFRASTRUCTURE SERVICES	77	Aurora, Colorado, US
122	CHARLES WILSON ENGINEERS (CW PLANT HIRE)	76	Harpden, UK
123	GREGORY POOLE RENTAL EQUIPMENT	75 <sup>EST</sup>	North Carolina, US
124	MORRIS LESLIE PLANT HIRE	65	Kinfauns, UK
125	AVER ASIA	58	Singapore, Singapore

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Euromachine will highlight its Arditia pump series at IRE. PHOTO: EUROMACHINE



### Event details

**WHEN:** 6-8 June  
**WHERE:** MECC Exhibition Centre  
 Maastricht, The Netherlands

Also co-located with the APEX and IRE shows will be the European Rental Association's annual convention and the European Rental Awards.

[www.apexshow.com](http://www.apexshow.com) | <https://ireshow.com>

### IRN delves into what visitors will see at APEX and IRE in June.

Anticipation has been building for the return of APEX and IRE. With the opening of the events drawing ever closer, we take a look at a selection of products on show, from electric equipment to storage solutions, to spider lifts and telehandlers.

#### IRE

Part of its latest line of electric equipment, **VOLVO CE** will show its EC18 Electric mini excavator. Described as easy to operate, the 1.8 tonne excavator is powered by a Volvo D0.9A engine and can last up to 6 hours of work per charge depending on the environment and task at hand.

The on-board charger, which supplies a 3kW power output to the batteries, charges the machine from 0% to 100% in as little as 6 hours, according to the company. For faster charging, the EC18 Electric comes with a range of optional fast off-board chargers that can charge the EC18 Electric from 0 to 80% in up to 1 hour 15 minutes.

**EUROMACHINE** will highlight its Arditia pump series for dewatering, wastewater slurry pumping applications, that it developed alongside Cornell Pumps.

# Last call for Maastricht

PHOTO: VOLVO

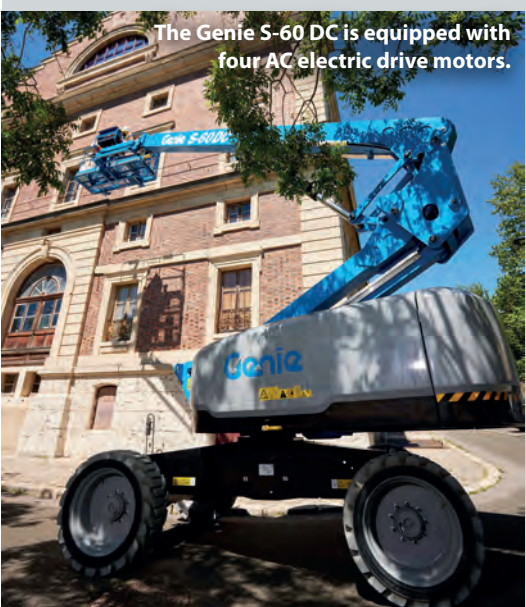


Volvo's electric range.

#### APEX

Electrification will be a key theme for **GENIE** at APEX, as it is for so many other manufacturers at the show.

Genie's equipment display will include both hybrid and



The Genie S-60 DC is equipped with four AC electric drive motors.

electric boom and scissor lifts models, including the GS-1932 E-Drive Lithium-Ion and GS-3246 scissor lifts, the electric S-60 DC telescopic boom lift and the hybrid Z-45 FE articulating boom lift.

The GS-1932 E-Drive scissors lift features a specially designed zero-maintenance battery that, in addition to providing a full working day's use of the machine, has a 10-year lifespan and comes with a five-year warranty.

The battery can be charged in just four hours, which Genie claims is 33% faster than FLA batteries, and can tolerate temperatures as high as 49° Celsius and as low as -29° Celsius.

The manufacturer's equipment line-up will also include its award-winning electric S-60 DC boom lift. Said to be the industry's first lightweight, four-wheel drive electrified telescopic boom lift in the 18m height class.

The S-60 DC is equipped with four AC electric drive motors and weighs just 7,983kg, which is "about one-third less than comparable booms".

Genie will also showcase a boom lift equipped with its TraX feature.

**MAGNI** will showcase the latest range of articulated

#### The Magni/Dingli HTBJ30RT boom lift.

and telescopic boom lifts built through its partnership with Dingli, including articulating models with heights from 16m to 28m and capacities ranging from 250kg to 300kg, alongside new telescopic boom lifts that provide heights from 16m to 44m with capacities of between 250 to 454kg.

Magni will also show four new scissor lift models. Extending the reach of its existing off-road product line, the new models comprise the 28m electric ES2825RT and diesel powered DS2825RT scissor lifts, and the 32m electric ES3225RT and diesel DS3225RT models.

Alongside these will be two new vertical lift mast models. The MJP070F and MJP080F offer working heights of 6.7m and 7.6m respectively, with capacities of 200 and 227kg respective."



#### Spiders

The **PALAZZANI** stand will focus on green energy with ECO





The MaxiTrack is said to be unbreakable by vehicles up to 130 tonnes.



According to Dragon Equipment, the CR300 can crush up to six tonnes of concrete an hour. PHOTO: DRAGON EQUIPMENT

PHOTO: GROUNDGUARDS

## Ground protection

GroundGuards will demonstrate the MaxiTrack trackway mat, said to be guaranteed unbreakable by vehicles up to 130 tonnes, and the FastCover Plus temporary walkway matting product.

MaxiTrack is suitable for medium to longer-term projects especially if there's to be higher traffic volumes and increased use such as temporary access roads. Softer ground conditions, heavy machinery use, or larger areas like car parks or site compounds are all applications where this system performs well.

The pumps are available in both high-volume diesel and electric units which can reach high flows up to 8,600 m<sup>3</sup>/h, and at very high pressures, up to 250 meters.

UK-based **DRAGON EQUIPMENT** will bring its



Western Global says its DEF Cube can increase job site efficiency.

PHOTO: WESTERN GLOBAL

newest launch, the PB1000 Power Barrow. Said to be capable of safely carrying, lifting and tipping loads of up to 1000kg, the PB100 is powered by a Vanguard 400 14HP engine, and comes with an all-terrain track base and weight of under 650kg, while its steel bucket is described as "durable and robust."

In its lowest position the front of the bucket is just 870mm from the ground to enable loading by hand easier.

The company will also show its CR300 Crusher, which can crush up to six tonnes of concrete an hour. With width of 700mm and weight of less than 780kg, the crusher has been designed to provide access through standard doorways and around tight corners.

**HELI** will show its HELI G2 Series 2-3.5 tonne lithium battery forklift. The company says the machine comes with a maintenance-free battery which produces no pollutants or emissions.

## Fuel storage

**WESTERN GLOBAL** will use IRE to highlight its all-new diesel exhaust fluid (DEF) cube, a 500 Litre storage tank designed to support and extend the run time of stage IV/V generators and other non-road mobile machinery.

The company says the DEF Cube has all the same features as its TransCube Global, as well as the DEF inner tank, including forklift pockets for easy transport, lockable compartments for enhanced security, and a stackable design to optimise space. The tanks can be operated and fill the equipment with both fluids at the same time, and as a result, increase job site efficiency, according to Western Global.

PHOTO: EMILIANA SERBATOI

**Emiliana Serbatoi** says it will highlight new launches in its Carrytank line of transport tanks.



It also has a polyurethane interior to reduce weight and cost, while its design is said to provide integrated heating options and enable it to be transported to any site.

Italian OEM IRE **EMILIANA SERBATOI** says it will highlight new launches in its Carrytank line of transport tanks.

Released towards the back end of last year and beginning of 2023, the new additions come with 150 litre 330 litre and 600 litre volumes.

The company will also show the CARRYTANK 220 pickup, a transportable diesel fuel tank with 220 litre capacity that is made from roto-moulded linear polyethylene. The company says the tank can be placed inside the body of a pickup vehicle and remain below the height of the side boards, allowing the installation of the most common closures for bodies, while it also has "optimised the dimensions of the tank for international transport." **IRN**

versions of the XTJ 52, TZX 250 and XTJ 35.1 Ragno spider lift models taking centre stage.

The new Ragno TSJ 35.1 includes the "latest generation technology for easier maintenance" and performance.

The TSJ 35.1 spider is available in a full green ECO power version that includes an AC electric motor and a lithium-ion battery, and as hybrid model with an electric motor and diesel engine.

While the TSJ 35.1 offers an outreach of 15m and a working height of 35m, the Ragno XTJ 52+ is described as "the colossus of the Palazzani range".

The XTJ 52+ spider is a bi-energy unit that is equipped with a diesel engine and an electric motor.

It features the company's Area manager system, which automatically adjust the machine's 19.5m maximum outreach according to its stabilisation and load.

## Telehandlers

Other highlights on Magni's APEX 2023 stand are to include its RTH rotating telehandler range.

The RTH product line of 14 models comprises eight restyled versions of previous machines and six newly introduced models. It offers capacities ranging from 5 to

13 tonnes, lifting heights of 18 to 51 metres and reaches from 14 to 34.5m.

**FARESIN INDUSTRIES** will present an updated version of its 6.26 Full Electric telehandler model, with the machine set to be the manufacturer's standout exhibit at this season's major equipment trade shows.

The new 6.26 Full Electric MY 2023 model is a redesigned version of the original 6.26 Full Electric model introduced in 2018 with full production starting in 2020.



Palazzani's The TSJ35.1.



Magni's RTH telehandler product line.



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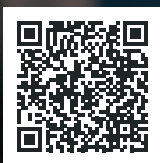
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**SK34SR-7**



**SK39SR-7**







GAP Hire Solutions has 10 specialist divisions.

**Demand for specialist services means rental companies are expanding their product portfolios to meet customer needs.**

# Industry specialists

“ Special rental solutions are, in combination with general rental, providing a significant added value and synergy for clients. ”

**ROBERT WILLEMSSEN,**  
managing director,  
Boels Rental.



In his column in the March-May issue of *IRN*, Andy Wright, CEO of Sunbelt Rentals UK, argues that it is possible for companies to provide both specialist and general services.

And, while the generalist still takes up a large part of the rental sector, the number of rental companies offering specialist services has risen over the last decade.

One such company that has moved into this space is GAP Hire Solutions, which has 10 specialist divisions made up of plant, tools, lifting & TIC, survey & safety, trenching & shoring, welfare, non-mechanical, tanker services, event services and pump services.

In addition to equipment rental, the company also has a range of technical services that includes site surveys, which is carried out by technical specialists, customer equipment inspection, servicing and repairs.

Karen Greenshields, managing

director, technical and environmental services, GAP Hire Solutions, says the company is seeing demand for technical support of equipment rental, a service she believes is “key when supplying equipment that requires an additional level of specialism.”

“Each of the divisions from GAP are separate and run by specialists in their field,” says Greenshields, with the company investing heavily in “people, premises and equipment to keep each division focused on specialist support.”

According to Greenshields, this approach also means the company can evaluate the impact specialty rental has had internally.

## Industry trends

One of Europe’s largest rental companies, Boels Rental, is also invested in specialty rental services, and has 13 divisions, including site accommodation, industrial, site preparation and site security.

Speaking to *IRN*, Robbert Willemsen, managing director >



of Boels Rental, said the company had seen a “growing demand for total solutions when it comes to rental” in the last couple of years.

“Special rental solutions are, in combination with general rental, providing a significant added value and synergy for clients. The one-stop-shop and requirements from the market has become more prevalent in recent years, with customers seeking to streamline their rental needs by sourcing all required equipment and services from a single supplier.”

According to Willemsen, Boels has responded to this trend by expanding their product portfolio to include a broader range of specialised equipment which enables customers to find all the equipment they need in one place. This, he says, has led to an increase in special rental as customers seek out unique and complementary equipment for specific projects.

## Specialty plays part in record Q1 for United Rentals

United Rentals reported rental revenues for its first quarter of \$2.740 billion, an increase of 26.0% year-over-year for the three months ending March 31. The increase reflects the broad-based strength of demand across the end-markets served by the company, as well as the impact of the December 2022 acquisition of Ahern Rentals.

Year-over-year, fleet productivity increased 2.0% while average original equipment at cost (“OEC”) increased 25.6%. On a pro forma basis, including the pre-acquisition results of Ahern Rentals, first quarter rental revenue increased 16.6% year-over-year, supported by a 12.2% increase in average OEC and a 5.9% increase in fleet productivity.

According to United, “Key verticals saw growth across the board, led by nonres construction, industrial manufacturing and power.” The company added it saw double-digit growth in all of its operating regions, and its specialty business delivered another strong quarter with rental revenue up 24% year-on-year and strong growth across all lines of business, led by United’s mobile storage team.

Within specialty, United opened six new locations and said it is on track for around 40 cold starts this year.

## Specialist as a growth strategy

In its financial results for the nine months ended 31 January 2023, Ashtead Group, owner of Sunbelt Rentals, posted a 25% increase in Group revenue and said that the positive results revealed the benefits of its strategy of growing its specialty businesses. In the US, its general tool business grew 22%, while its specialty businesses grew by 33%.

A key part of the increase was acquisitions, according to the company, which saw it make no fewer than 16 purchases of specialised businesses throughout the nine-month period. These include companies within the power, temporary fencing, TV and film and HVAC sectors.

Willemsen agrees that specialty rental and acquisitions of companies already offering it as a service has played a key part of the approach taken by Boels, “In recent years, Boels has increased its special rental offerings by acquisitions due to the growing interest of the one-stop-shop principle and the demanding and changing requirements of the market in combination with supporting the availability and solution selling as one of their unique selling points, and their focus on meeting customer needs.

“Investing in specialty rental has been part of the company’s growth strategy, particularly as it is linked to general rental and serves a broader scope of customers with demanding needs. By providing specialised rental options, Boels can differentiate itself from competition and offer unique value to customers. This helps attract and retain customers, and ultimately lead to increased successes.”

Apart from adding new specialties through acquisitions, Willemsen says changes in its services forms part of its future strategy, adding that the company “need to adapt and change accordingly to stay ahead and challenge the



Sunbelt Rentals made a number of acquisitions in the UK TV and film rental sector last year. PHOTO: ALPHA GRIP

customers and attract potential new customers in existing or new segments.”

## The view from Asia

According to Japanese giant Kanamoto, it is seeing a particular demand for equipment that comes with remote control systems as standard, driven by an increase in the number of projects related to ICT and IoT and changes in the social environment and rise in interest in green energy.

Responding to this demand, the company says it is providing remote control systems and new services in collaboration with construction companies and manufacturers. This, according to Kanamoto managing director Masaomi Tamura, is a long-term investment. “Customer needs are changing, and we are constantly making changes in the ICT and IoT fields and we recognise that this is an item that we will need to continue to strengthen in the future.”

In terms of its approach to specialty rental, Tamura adds that the company believes that its proactive approach to its solutions will pay off in the long-term. “We believe that responding in advance to changes in needs, such as labour saving and energy efficiency due to the declining working population, will lead to an increase in corporate value.”

Elsewhere in the Asian market, Aktio has also seen an increase in the number of customers requesting specialist services.

It says that “as the needs of general contractors and other customers become more diversified and segmented, there

are occasions when simply acquiring and renting existing construction equipment manufactured by manufacturers is not sufficient to meet their needs.”

This, according to the company, is where its Resulting service is beneficial. “Aktio’s strength lies in Resulting, which is a fusion of construction equipment rental and consulting. Diversifying customer needs, demanding environmental performance and labour reduction. We feel that there is a growing interest in Resulting, which is the result of Aktio’s innovative and flexible approach to handling construction equipment from multiple manufacturers.

“Through Resulting, we are able to meet the sophisticated needs of our customers by proposing unique machinery through in-house development of private products and joint development with manufacturers.” **IRN**

**Aktio says acquiring and renting existing construction equipment manufactured by manufacturers is not sufficient to meet customer needs. PHOTO: AKTIO**



PHOTO: GAP HIRE SOLUTIONS

GAP Pump Services’ fleet comprises Stage V pumps from suppliers including Atlas Copco, DXB pumps and Active Engineering.



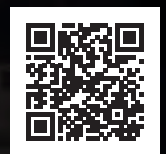




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Factors such as regulations and demand for digital solutions is driving demand for excavators in the mini and midi range, writes Lewis Tyler.

Yanmar's SV17e electric mini excavator prototype.  
PHOTO: YANMAR

# Small but tough

In terms of numbers sold, mini and midi excavators might not match up to some of the models in the larger categories, but they have certainly grown in popularity in recent years, as users can reduce both manual labour and costs.

Due to their capability to be used on a number of job sites, excavators in the mini and midi range are the equipment of choice for many end users. Able to carry out work that their larger counterparts are unable to, it is one of the fastest growing equipment sectors in construction.

The size, according to Kobelco, is partly why it is seeing an increase in demand for mini and midi excavators. "We're finding that the demand for short radius excavators has increased significantly in recent years. These machines are vital on jobsites with restricted space as they have a much smaller working footprint.

"In regions such as Italy, France and Austria, these short radius machines also are ideal for working on narrow, mountainous roads without disrupting traffic, or up against hedges, fences and next to ditches."

Kobelco SK39SR-7 mini excavator.  
PHOTO: KCME

## Electric power

While it could be argued that construction is historically slow to adapt to alternative powered equipment, the rise in popularity of electric equipment in the sector seems to point to an industry that is continuing to embrace new methods.

And, while there are obvious benefits for the user to opt for alternative powered solutions, Chris Bardas, product manager, Hitachi Construction Machinery (Europe) NV, believes stringent regulations in some areas has played a key part in the demand for zero-emission equipment in the mini and midi excavator space.

"Due to EU regulations, and the growing need for sustainable zero-emission solutions, mini and compact excavators are among the fastest growing product segments.

"We have seen strong and steady growth in the traditional markets such as the UK and Ireland, Germany

and Scandinavian countries. In addition, countries such as Italy, Poland, Greece and Portugal are also showing signs of strong growth."

Off the back of this growth, the company has developed its own zero emission excavators, the ZX55U-6EB mini and the ZX85-6EB, which it launched at Bauma 2022.

On the new launches, Bardas says the performance of the compact electric machines matches the level expected of excavators powered by traditional fuel.

"One of the main advantages of our zero-emission mini >

Doosan has a wide range of mini and midi excavators.





and compact excavators, the ZX55U-6EB and ZX85U-6EB, is the high level of performance they provide. No compromises have been made in terms of performance and they have been designed to provide similar levels of performance as diesel alternatives. The fact that they are zero-emission and quieter than diesel models are additional benefits," says Bardas.

Another OEM looking to embrace alternative power is US giant Caterpillar. Some of its latest launches include the Cat 302.7 CR, 303 CR and 303.5 CR Compact Radius, which it launched in 2021. However, Sam Matthews, product & application specialist for mini excavators and small track type tractors in Europe, Africa & Middle East, Caterpillar, reveals the company is currently developing an electric machine. "To help customers achieve their sustainability goals, we will expand the portfolio with a 301.9 battery electric model which is currently in development.

"This model will be equipped with a 32kWh (gross capacity) battery which allows the machine to run for extended periods. We will be releasing an off-board fast charger for it too. The 301.9 battery electric model will have the same features as the other next generation mini excavator models and with the same linkage and cylinders as the 301.8."

## Technological advances

Another key factor that Hitachi's Bardas points to is technological advancements, which he says was a consideration for the OEM with its latest launches. "The ZX55U-6EB mini and the ZX85-6EB compact excavators are equipped with ICT solutions, safety features such as rear- and side-view cameras, and benefit from the Zaxis-6 cab, which is renowned for being highly comfortable and spacious, with an ergonomic seat and user-friendly controls and colour monitor."

The demand for technological solutions from the market is also echoed by David Cockayne, regional director, Northern Europe at Yanmar Compact Equipment EMEA, who points towards planned and predictive maintenance via telematics as a key driver for innovation in mini and midi excavators.

For Develon (previously Doosan), telematics is already a key feature in some of the company's latest models. Stephane Dieu, excavators product manager, Europe for Develon, says that, "With the arrival of our DX-7 range, all of the new mini-excavators in the range are now equipped with our DoosanConnect telematics system, which was restricted in the past to only our medium and heavy segments – 14 tonne and over in the excavators. This gives our customers the opportunity to fully monitor their compact fleet."

Elsewhere, Caterpillar has previously launched its Cat Grade platform, which is available in its dozers, excavators and paving equipment. Matthews says the company is predicting more demand for this type of technology in the future. "There is a move towards using more technology,



According to Hitachi, the ZX55U-6EB has been designed to provide similar levels of performance as diesel alternatives. PHOTO: HITACHI

## First EV mini from New Holland

New Holland Construction is releasing its first commercially available EV machine, the electric-powered, zero emission E15X mini excavator.

The E15X has a 29hp cobalt-free lithium-ion battery and a 21.5hp motor – equivalent in power to its E14D diesel counterpart.

When fully charged, the battery can operate for up to eight hours, and it can recharge in 10 hours with a standard 110V outlet or within an hour with its fast-charge features, the manufacturer said.

The mini excavator uses bio-hydraulic oil to extend service intervals; comes with pre-set precision, normal, productivity and individual control modes that can be independently adjusted; and runs quieter than similar diesel models.

The machines variable height and width adjustments allow the E15X's undercarriage to be narrowed to 31 inches and the height to be lowered to less than 4.9 feet by rotating the roll bar. According to the manufacturer, customers can fit the E15X through most standard-sized doors.

The new E15X mini excavator. PHOTO: NEW HOLLAND CONSTRUCTION



especially for the larger models. Tilt-rotate couplers which have been prevalent in Northern Europe are now increasing in popularity in other regions as they enable the machine to reach more work area from a single position and to manoeuvre around obstacles.

"Similarly, Cat Grade and other assist technologies help the operator get better accuracy, do less rework and lower costs."

## Next generation equipment

In March this year, Kobelco gave a glimpse into the future of its equipment with the launch of the SK34SR-7 and SK39SR-7 mini excavators, which are said to offer increased engine performance, improved operability, an updated cabin interior and easier maintenance when compared with the previous SK30SR-6E and SK35SR-6E.

In addition to the new cabin design, the Kobelco SK34SR-7 and SK39SR-7 comes with increased engine

output (from 18 to 19 kW), larger bucket cylinders (from 65 to 70mm) and 15% increase in bucket digging force (from 27.8 to 32kN).

Kobelco says the machines, which were showcased for the first time at the SaMoTer exhibition in Verona in May, demonstrates "how we are continually developing our mini excavator technology and machine concepts in order to better meet the increasing demands of our operators."

Another machine that is currently in the development stage, Yanmar is working on its SV17e electric mini excavator prototype, designed for the 1.5 to 2.0 tonnes segment. According to Cockayne, the unit is powered by an "all-electric drive and features an open-centre hydraulic system with load-sensing hydraulic pump, creating an exceptional experience for both owner and operator. It boasts impressive digging, lifting and carrying capabilities, all while meeting the world's most demanding emissions restrictions and offering ultimate comfort, ergonomics and control."

IRN



Caterpillar announced four battery electric machine prototypes last year, including the 301.9 mini excavator. PHOTO: CATERPILLAR





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According to Dynapac, the DFP5X e offers the same quality as its conventional counterparts. PHOTO: DYNAPAC

## Rental a key focus for Ammann

On its stand at Bauma 2022, Ammann said the company were focusing on electric and environmentally friendly releases designed with attention to the rental market.

Among the machines on show was the APF 15/50 – plate vibrator, which is fitted with a Vanguard engine.

Speaking to *IRN*, Ammann Germany International Key Account Manager Patrick Stellweg pointed out a useful feature proving beneficial to rental companies.

“With this machine, the moment you stop it, the fuel valve closes, so that’s a very useful feature. It’s a common problem that operators often forget to close the fuel valve, which causes a lot of wastage. The fuel can also run into the engine, running through the cylinder, mixing with the oil and this creates additional wear on the machine.”

“If I can double the service intervals to two years rather than a year, then I have less oil being used and a very good environmental outcome from a small feature.”

# Sustainable focus

## Alternative power and autonomy drives change in compaction equipment.

In almost every faction of construction equipment, the drive to produce low-emission or zero-emission machinery is increasing.

In the compaction sector, OEMs such as HAMM, Bomag, Dynapac, Swepac and many others are continuing to invest in such equipment as regulations and environmentally conscious customers push for innovation in the industry.

This is a sentiment that Matthew Biellers, global product manager, Dynapac, shares. Speaking to *IRN*, Biellers says the company’s customers are “becoming more interested in machines with alternative power sources, including electrification.”

### Customer demand

The demand from its customers is reflected in three of Dynapac’s recent

#### The CC1000 e electric tandem roller was launched at Bauma 2022.

PHOTO: DYNAPAC



launches, the DFP5X e, DFP8X e & DFP9X e all-electric forward plates. Launched earlier this year, the models are available in the 50, 80 and 90kg weight class and offer between 300mm and 500mm minimum compaction width.

According to Dynapac, the plates offer the same quality as their conventional counterparts, but with the long-term benefits of an all-electric operation and are built to meet the toughest construction machinery requirements.

The company also launched the CC900 e & CC1000 e electric tandem rollers at Bauma 2022. According to Biellers, both rollers “reduce carbon footprint by producing no emissions at point of use, limit operation costs as they are without the need for many fluids or filters, and have no learning curve by utilising the operating platform we current use on our Generation VI Small Tandem Rollers (CC1100 VI – CC1400 VI), so any operator with experience with them will not notice any difference to operating a diesel machine besides a much quieter working environment.”

Another OEM making a sustainable equipment push is Swedish company Swepac. From its Battery One range, the company is launching six models, three standard forward plates between 55kg and 90kg (F52B, F82B, F92B), a 90kg round plate (FR95B) and two professional asphalt plates (F70BA, F90BA).

The models have interchangeable Battery One batteries and chargers which allows users to select



The F52B forward plate. PHOTO: SWEPAC

battery sizes and chargers depending on the application, while also allowing for batteries that are compatible with equipment from other vendors.

Swepac is also launching an internal vibrator based on a battery-powered backpack with the Battery One concept. Each of these products can use any of the three Battery One battery variants (BOB5, BOB10 or BOB14) depending on the desired running time before having to re-charge. Each of the battery variants can be charged by either a standard or a fast charger.

### Electric focus

Elsewhere, Hamm exhibited its first fully electric battery-powered tandem rollers from its HD Compact Line series at the ConExpo construction exhibition in March, alongside several other new launches.

Expected to be available on the US market at the end of 2023, the range includes the 2.5 tonne HD 10e and 2.7 tonne HD 12e, both of which are powered by a single, 48V lithium-ion battery with a capacity of 23.4kW.

According to Hamm, both models deliver the same compaction power as their diesel-powered equivalents and offer emission-free and quiet operation.

The battery can recharge from 0% to 100% in approximately 4 hours with a 400V, rapid charge plug, or roughly 7.5 hours with a standard 240V, earthed plug, and last a full working day on a single charge.

Another trade show launch, Bomag, part of Fayat Group, >





The BW 120 AD e-5 light electric tandem roller.  
PHOTO: BOMAG

unveiled its BW 100 AD e-5 and BW 120 AD e-5 light electric tandem rollers at Bauma 2022.

The company says the machines come with two “highly efficient electric motors on board” for the travel system and steering as well as vibration. For charging, built-in rechargeable batteries that can be charged with a voltage of 230V or 400V are fitted into the machines which can be charged directly at an external DC charging point or using a CEE socket, wall box or a domestic connection.

**Autonomous compaction**

The role of technology has played a key role in

Hamm unveiled several new machines alongside the HD 10e and HD 12e at ConExpo. PHOTO: HAMM



the development of compaction equipment. For Dynapac, this comes in the form of an autonomous version of its soil compactors that it is launching alongside Trimble. The equipment is currently in the testing stage.

At ConExpo, Bomag also unveiled a new autonomous concept, the ROBOMAG 2.

Based on the BW 177 D smooth single drum with a 66.5in (1.690mm) compaction width, the ROBOMAG 2 single drum roller features Bomag’s building block technologies combined with GPS, Lidar and position sensors.

Together these obtain information on position, situation, and movement using a combination of different technologies for spatial orientation, environmental perception, and environmental safety. This allows the ROBOMAG to be used completely independently in a defined work area, in “safe, fully autonomous operation”.

Additionally, remote control operation also means operators can “complete manually entered movement patterns”, as well as load and unload the machine from transport vehicles. A comprehensive safety concept with sensory environment recognition is used to prevent collisions.

IRN




**Simple compaction**

Caterpillar has launched an initiative to simplify nomenclature for select models in the Cat vibratory soil compactor range. To correlate with the GC models in the compaction product family, all models within the soil compactor line will feature weight-based names derived from the metric tonnage class in which the model competes. Additionally, the model series descriptor letter suffix will be removed.


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[www.plantworx.co.uk](http://www.plantworx.co.uk)

The TL25.60 telehandler from Bobcat will make its first UK appearance at Plantworx. PHOTO: BOBCAT

# The wait is over

**Biennial event returns, with innovation in equipment and technology high on the agenda.**

One of the biggest construction equipment and technology events in the UK returns between the 13 and 15 June. Plantworx, which is held at the East of England Arena & Events Centre, Peterborough, promises to bring together 300 exhibitors. So, what can visitors expect to see?

## Innovation in construction equipment and technology

Making its UK trade show debut will be **DEVELON** (formerly known as Doosan Construction Equipment). The company has confirmed it will display several new products on its stand, such as the new DX63-7 six tonne and DX85R-7 eight tonne mini-excavators.

Completing the full line up is the DX27Z-7 mini-excavator, DX100W-7 wheeled excavator, DL80TL-7 compact wheel loader, DX140LCR-7 15.6 tonne crawler excavator and the DL280-7 wheel loader. In its demonstration area the company will showcase its DX250WMH-7 Material Handler.

Elsewhere, **BOBCAT** will present a host of new products for the first time. From its telehandler range, the TL25.60 telehandler will be on view with the T36.120SL and T40.180SLP telehandlers, while the T86 R-Series Compact Track Loader, L85 compact wheel loader and L28 small articulated loader will also be exhibited.

From its range of excavators, the company will exhibit its E88 8 tonne Stage V compliant mini-excavator and E10z, E17, E27z and E55z mini-excavators.

Other debuts from the company include its Ground

Maintenance Equipment (GME), MaxControl Remote Control system and Light Compaction Product Line.

Construction technology specialist **LEICA GEOSYSTEMS** will demonstrate its 3D collision safety solution integration with Xwatch Safety Solutions.

The solution allows users to create or import 3D avoidance zones above and below the surface area directly within the Leica MC1 machine control software. It works by combining the Leica MC1 machine control software and XW5 Series from Xwatch Safety Solutions.

**SANY** will have its biggest stand at Plantworx to date and will use it to debut two new wheel loaders, the SW305 and SW405 alongside its latest range of excavators.

The company will also host the Sany Operator Challenge, which will see visitors put their operator skills to the test.

Other exhibitors to confirm their attendance include



The DX85R-7 from Develon. PHOTO: DEVELON

Leica Geosystems will demonstrate its 3D collision safety solution integration with Xwatch Safety Solutions.

PHOTO: LEICA GEOSYSTEMS

**CATERPILLAR, ATLAS COPCO, GAP HIRE SOLUTIONS, YANMAR and MAGNI.**

## New zones

Plantworx is launching the Get Connected Technology Zone, a space for technology providers in the construction equipment sector.

The new zone will bring together companies that have new and innovative ways of delivering solutions, with companies such as Leica Geosystems, Thomas Plant, Unicontrol, Sitech, Plinx Connect, MachineMax, GKD, and FTC confirmed to exhibit in the inside area.

Another new feature that will launch at the event is the BIG Ideas Zone, which said to be aimed at "startup companies, emerging innovators and established SMEs who are developing radical new concepts with game-changing applications."

## Conferences and awards

The Plantworx Innovation Awards Dinner will take place on Monday 12 June. The full list of awards is as follows:

- **Non-Operated Plant & Support Service**
- **Environmental Initiative**
- **Safety**
- **Best Use of Technology – Including Digital Innovation**
- **Security Initiative**
- **Engineering & Design**
- **Training & Skills Development Programme**
- **Special Recognition Awards**

The CEA will host its own conference on challenges in the industry. - *Today's Challenges – Tomorrow's Opportunities*. Conference speakers include:

- **Chris Sleight**, MD of Off Highway Research
- **Alex Woodrow**, MD of Knibb Gormezano (UK)
- **Dale Camsell**, CEA, Senior Technical Consultant
- **Riccardo Sardelli**, Volvo Penta
- **Richard Payne**, Cummins
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# Storing energy

*IRN's Murray Pollok*

**caught up with fuel tank specialist Western Global at the ConExpo show to talk about new products, new sources of energy and the impact of the investment by MML Capital in 2021.**

**W**hat happens when your business model is based around the consumption of fuel, and, specifically, diesel? In the case of UK-based Western Global – long-time provider of fuel storage tanks to rental companies – it has meant adjusting the product profile and preparing for a different future.

Simon Craddock, commercial director of Western Global, speaking to *IRN* at the ConExpo-Con/Agg show in March, says hydrogen fuel, when it comes, will inevitably become a focus; "It's part of our future thinking. We think that in the short to medium term, it will be renewable diesel [such as HVO] and then it will be batteries and hydrogen. As hydrogen adoption becomes mainstream, then we want to be part of that."

For the time being, though, the focus is on adapting to current market demand, and that means a new range of DEF (or AdBlue) storage tanks to use alongside gensets fitted with the latest low-emission engines.

At ConExpo, for example, the company launched the DEFcube, a DEF version of its well-known Transcube diesel tanks. Craddock says the new tank, which is a modified version of the Transcube, will allow rental companies to extend the running hours of gensets without requiring daily site visits to replenish DEF supplies.

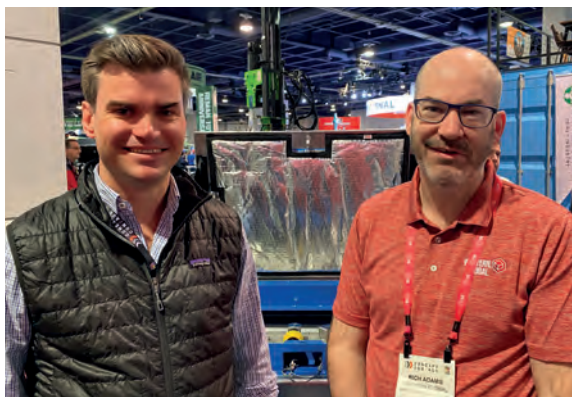
## Responding to demand

The first model is a 500 litre/130 gallon unit which matches well with a 5000 gallon capacity diesel tank. The DEFcube has a removable polyethylene inner tank that is suitable for containing DEF.

"We're starting with this size and we'll see what the demand is," says Craddock.

He tells *IRN* that the company's diesel tanks are also compatible with HVO fuels; "In the last 12 to 18 months, there has been a switch to HVO, and we are starting to see that also in the US, particularly on the West Coast. So, we're making sure the Transcube products are suitable for HVO."

**The new DEFcube has an internal polyethylene inner tank that is suitable for containing DEF. The tanks are stackable.**



**Simon Craddock (left), commercial director of Western Global, with Richard Adams, Western's CFO, at ConExpo in March this year.**

Like many manufacturers, Western Global is facing supply chain challenges, but its products don't use computer chips, so is in the unusual and enviable position of being able to supply tanks very quickly.

"Our key value proposition is that we have products in stock in the US," says Craddock, "We can turn around a unit in one to two days. Some filters and pumps have supply issues, but we maintained a higher stock level of those."

Part of that is down to £40 million inward investment in the business three years ago by MML Capital, a London-based private equity firm.

The funding helped Western open US locations in Sacramento and Charlotte over the past two years, which has reduced delivery times compared to the location in Detroit. That has helped the company boost its sales in North America, and it now has around 1,500 tanks on the ground.

The company's main production facility remains in Poland, just north of the city of Łódź, with an inventory store also in Bristol, UK, where its head office is based.

Richard Adams, Western's chief financial officer, tells *IRN* that the investment in facilities and its salesforce has had

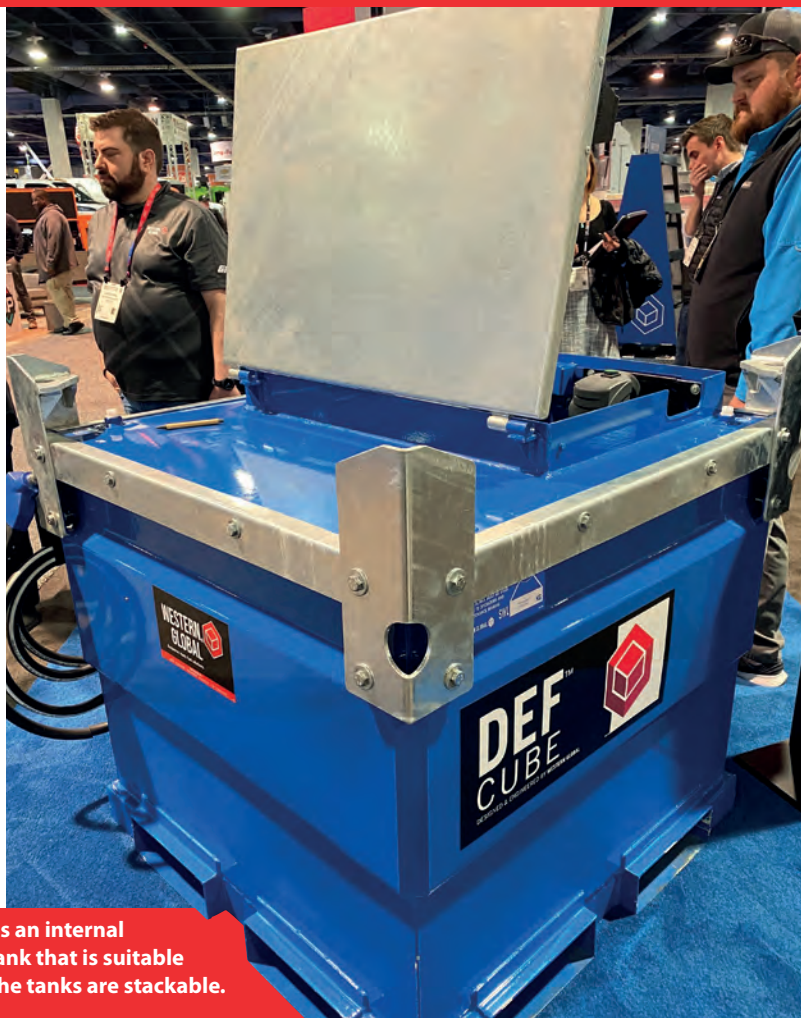
a significant impact on sales, with revenues growing from \$65 million in 2020 to closer to \$110 million last year.

## Across the board growth

The company sold 17,000 tanks in 2022 to around 5,000 customers, and as many as 40% of these were to rental companies. He says sales will hit more than 20,000 units this year.

"MML Capital has supported our growth plans," says Adams, "We've increased our staffing from 130 in 2020 to more than 200 now. It has supported our growth in people, facilities and product development for customer needs."

"Customers are working in remote locations and need a reliable source of power. We see ourselves storing that energy, however that develops over time." **IRN**



**A trailer-mounted version of a Transcube tank designed for North America.**



New calculator, set to be released in June, comes following extensive feedback from ERA members and other equipment stakeholders.

# Make sustainable choices with the improved Equipment CO<sub>2</sub> Calculator

The European Rental Association (ERA) is set to release a new and improved Equipment CO<sub>2</sub> Calculator, providing a comprehensive and easy-to-use tool for making sustainable choices when using equipment.

The updated Equipment CO<sub>2</sub> Calculator – version 2.0 – is based on extensive feedback from ERA members and other equipment stakeholders and will be released in June. It will include an expanded scope, enhanced functionality and improved navigation to provide a more comprehensive, easier to use and more practical tool for

equipment stakeholders, including rental companies, contractors, OEMs, public authorities and other equipment users.

## How it works

**3 Calculators in 1:** In order to expand the scope of the Calculator, the new version will effectively become three calculators in one. In addition to the equipment calculator in the current version, there will also be calculators for handheld tools and modular space, with the calculations tailored to each category of equipment across the parameters of production, transportation, lifetime and utilisation, energy consumption, maintenance and end-of-life.

### Single equipment and group calculations:

The new version of the Calculator will retain the current calculation of the carbon footprint of a single piece of equipment in a specific use scenario, which will be expanded to include handheld tools and modular space, as well as the comparison function.

In addition to this, version 2.0 will enable users to group calculations for a specific project, task or jobsite, or calculate the carbon footprint of an entire equipment fleet. Users will be able to group all categories of equipment into a single calculation and, in a later update, it will be possible to input the data in bulk from a standard template.

The results will show the total carbon footprint for all the equipment, with a breakdown of the impact of equipment from different categories.

**Improved navigation:** In order to navigate to the correct calculator, users will simply have to select the equipment type from 5 categories – ‘construction machines and equipment’, ‘powered access, forklifts and telehandlers’, ‘power and temperature control’, ‘modular and sanitary space’ and ‘smaller equipment and tools’. This will provide an easy and straightforward navigation and better user experience.

“ The results will show the total carbon footprint for all the equipment with a breakdown of the impact of equipment from different categories. ”

Version 2.0 of the Equipment CO<sub>2</sub> Calculator will remain an independent and free-to-use tool for all equipment stakeholders to make more sustainable choices when using equipment. It will be available on the same website as the current version (<https://equipmentcalculator.org/>) and, in addition to being available in English, a further update will translate it into French, German, Italian, Spanish and Dutch.

## Calculator updates

The Equipment CO<sub>2</sub> Calculator was first released in January 2021 and enabled equipment stakeholders to determine the carbon footprint of construction equipment over its entire lifecycle, with the results providing an estimate of the CO<sub>2</sub>e emissions per hour of use. It was updated in March 2021 to enable comparisons between different user scenarios and include alternative fuel choices.

The calculations are provided by the independent research consultancy CE Delft, who first developed the tool for the ‘Carbon Footprint of Construction Equipment’ study released in 2019, and the online tool was built by Alias2k, a digital services provider. **IRN**

For more information about the Equipment CO<sub>2</sub> Calculator, please contact the ERA Secretariat at [era@erarental.org](mailto:era@erarental.org).



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## About the ERA

The European Rental Association was created in 2006 to represent national rental associations and equipment rental companies in Europe. Today, the membership includes more than 5,000 rental companies, either directly or through 14 rental associations. The ERA is active through its committees in the fields of Promotion, Sustainability, Statistics and Technical, and through its Future Group.

Extensive information on the ERA's activities, reports and publications is available at [www.erarental.org](http://www.erarental.org)



**EQUIPMENT  
CO<sub>2</sub> CALCULATOR**  
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