

INTERNATIONAL

rental

NEWS

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Site dumpers take the load

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Official magazine of the ERA



TELEHANDLERS | ZEPPELIN E-PROCUREMENT | IRC REPORT

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Taking stock

As the last of 2021, this issue of *International Rental News* is an opportunity to take stock and also look ahead.

The year has been mixed to say the least in terms of signs of recovery following the outbreak of the Covid-19 pandemic in early 2020. The latest European Rental Association's Market Report (p50) shows the trajectory - in Europe at least - depicting a troubled 2020 for rental markets, a return to growth in 2021 and further growth forecast for 2022. Alongside these trends, it also outlines the longer term, and often diverse, impacts of the crisis on different markets.

This edition also captures some of the other important issues affecting the construction equipment sector. In the wake of the COP26 UN Climate Change Conference in November, it's apt to see many companies upping their game in environmentally driven initiatives (see news, p8), while our feature on ESG-linked finance (p40) examines the extent to which funding can shape sustainable industry initiatives.

Meanwhile our report on *IRN's* Cybersecurity Webinar in November examines the problem of cybercrime, which has grown exponentially in the past couple of years and has clear implications for rental companies. Fortunately, solutions are at hand, but a joined up, sectoral approach to solving them will also be critical.

Looking ahead, rental sector companies' achievements will again be recognised by the 2022 European Rental Awards, now open for entries, with a deadline of Friday 25 February. The Awards event will take place on the evening of 15 June 2022, during the ERA Convention in Riga, Latvia on 15 and 16 June 2022. We invite companies to put in their entries and have their efforts in innovating and advancing rental operations recognised.

On the subject of achievement, this issue also marks the end of our columnist Kevin Appleton's tenure with *IRN*, after nine years in the position. I would like to thank Kevin for his great contribution and insights and wish him well for the next chapter, and to welcome Andy Wright, CEO of Sunbelt Rentals UK, as our new columnist.

Enjoy the issue.

Belinda Smart

Editor

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Scissor Lifts: 5.9m - 32m



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...inside

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THE WRIGHT COLUMN 13

From January, *Andy Wright*, CEO of Sunbelt Rentals UK, is taking over from *Kevin Appleton* as *IRN's* regular columnist. He has a rich rental background, including leadership roles at Speedy, Aggreko and Lavendon Group. We asked him about his rental career.

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DIARY DATES

2022

EXECUTIVE HIRE SHOW

9-10 February, 2022
Coventry, UK

IAPA / IPAF SUMMIT

10 March, 2022
London, UK

ERA CONVENTION

15-16 June, 2022
Riga, Latvia

NEWS IN BRIEF

■ German rental and sales company HKL Baumaschinen is opening 'Baushop 2.0' stores nationally. The new equipment sales locations are in addition to its main equipment rental activity.

■ Modular accommodation specialist Modulaire Group has agreed to acquire Spanish modular firm Alquibalat, 'Balat'. Based in Pamplona, Balat operates over 15,000 units from 15 sites in Spain and Portugal.

ERA forecasts 5.6% rental growth in 2022

The European Rental Association (ERA) is forecasting a 5.6% increase in rental activity in Europe in 2022, following estimated growth of 6.3% this year.

The organisation said its 2021 Market Report estimates that the industry shrank by 7.2% in 2020 when the pandemic had its greatest impact. ERA said the industry generated revenues of €25.2 billion in 2020.

The association, which works with consultant IHS Market on its estimates and forecasts, said Covid continued to hamper the recovery directly and indirectly.

"The Nordic countries, which did

not lock down and with almost no site shutdowns, performed better than southern Europe and the UK, which faced severe lockdowns and disruptions to activity", said ERA.

ERA said the reopening of European economies after the first quarter of 2021 has benefited rental activity with "solid growth" forecast for 2021, mainly in Southern Europe and the UK, which were the worst-hit regions.

In 2020, markets like France, Italy, Spain and UK all fell "considerably", while others such as Switzerland, Sweden and Germany also lost ground but fared better overall.

Extended version of IRN100 now available

The IRN100 Extended Edition is now available for download at internationalrentalnews.com. The IRN100 is *International Rental News'* annual league table of the top 100 rental companies in the world, based on revenues from the previous year (2020), and the extended version looks at these companies in more detail. The

overall theme is the impact of Covid-19 on the construction equipment rental sector, and businesses' resilience in responding to it.



New company to oversee Doosan and Hyundai Construction

Following the purchase earlier this year of Doosan Infracore by Hyundai Heavy Industries Group, an intermediary holding company called Hyundai Genuine (HG) has been set up to oversee both firms.

Doosan Infracore has been renamed Hyundai-Doosan Infracore and both it and Hyundai Construction Equipment will operate as subsidiaries of the newly created HG group. However, they will continue to operate under their own management systems, competing as sister companies within the global equipment market.

HG will provide support to both businesses and help facilitate

cooperation – there are several areas where the two companies will work together. This includes the joint development of integrated excavator and wheeled loader platforms by 2025 and working on the development of hydrogen engines for construction machinery.

Doosan Infracore and Hyundai Construction Equipment will work together as part of HG with the aim of becoming one of the world's top five biggest OEMs. The construction equipment business will be developed as a core sector of the group and will receive further investment.

NEWS IN BRIEF

■ United Rentals Europe has added electric submersible pumps and further diesel and electric centrifugal pumps to its offering. They feature telemetry, emergency stop switches and remote monitoring.

■ Danish rental company GSV has acquired Mogens Hansen, an earthmoving equipment rental business. The deal, for an undisclosed price, adds 12 employees and 22 large earthmoving machines to GSV.

■ UK rental firm Speedy has extended its partnership with UK DIY and builders' merchants chain B&Q, following a successful trial in 16 B&Q stores, with a further 23 in-store outlets scheduled to open by January 2022.



Yanmar Compact Equipment has developed a prototype electric mini excavator, the SV17e. With commercial launch scheduled for Bauma in October 2022, it will target European customers. It is powered by an electric drive and 48-volt batteries with fast charging capability.

Herc acquires US Chicago-area lifting specialist SkyKing

Herc Rentals has added to a string of recent acquisitions with the purchase of Chicago-area SkyKing Lift Rentals, for an undisclosed figure.

SkyKing Lift Rentals is a single-location rental business specialising in mobile elevating work platforms including scissor and boom lifts.

The company has grown over the past five years and, according to its website, now operates "one of the largest independent rental fleets in the Midwest" comprising leading aerial lift brands of aerial lifts with an average age of less than five years.

The acquisition of SkyKing Lift Rental expands Herc's Chicago-area presence to six physical locations.

Rolls Royce has partnered with investment firm Sustainable Development Capital LLP (SDCL) to jointly offer 'Energy-as-a-Service' including sustainable power solutions for the rental market. Pictured: the agreement was signed at COP26 in Glasgow on 11 November. From left: Perry Kuiper, President Sustainable Power Solutions at Rolls-Royce; Jonathan Maxwell, CEO and Founder of Sustainable Development Capital LLP; and Andreas Görtz, VP Stationary Power Solutions at Rolls-Royce.



Tobroco-Giant is launching a new electric powered vibratory plate, having become the first company in Europe to get permission from Honda Engines to use its GXE2.0H electric engine. Designed for heavy duty applications, the GIANT GP1950E ('E' for electric) recently entered mass production.



U.S. ITC body announces final ruling on Chinese MEWP tariffs

On Nov. 10, the U.S. International Trade Commission unanimously ruled that U.S. MEWP manufacturers are being economically harmed by Chinese MEWP imports and therefore announced countervailing tariffs will go into effect.

Following the U.S. Department of Commerce's determination that MEWPs are being subsidised by the government of China, Chair Jason E. Kearns, Vice Chair Randolph J. Stayin, and Commissioners David S. Johanson, Rhonda K. Schmidtlein and Amy A. Karpel made the affirmative threat determinations.

The ITC ruling follows an October determination by the U.S. Department of Commerce that Chinese MEWP producers were receiving illegal subsidies from the government of China.

Kiloutou appointments to drive business in France

French rental company Kiloutou Group has made two new appointments in its home market: Christine Ouayoun as Sales Director and Xavier Boulet as Marketing Director.

Both will report directly to Kiloutou France General Manager Pierre Knoché.

Sales Director Christine Ouayoun will be responsible for structuring Kiloutou's commercial activities and leading its commercial strategy.

A member of the Kiloutou France Board of Directors, she will oversee commercial development and business reorganisation, developing the local authority market and integrating acquisitions across the company's departments.

Marketing Director Xavier Boulet will be responsible for streamlining Kiloutou's marketing activities. A member of the Kiloutou France



Christine Ouayoun, Sales Director - France, Kiloutou Group.

Board of Directors, he has experience in market positioning, sales performance, supply chain,

purchasing across markets in Europe.

Pierre Knoché, Managing Director of Kiloutou France said the appointments would support the link between Kiloutou's sales and marketing departments, strengthen its Board of Directors and help accelerate its development in France.



Doosan Portable Power has launched small Stage V compliant portable compressors (pictured) for the European market, rental-friendly generators and an LVL portable light tower for the Middle East and Africa (MEA) markets.

Kevin Appleton bows out as IRN columnist

Kevin Appleton writes his last column in this issue of *IRN*, after more than 60 articles over a nine year period. At the same time, we are delighted to announce that his replacement will be Andy Wright, the CEO of Sunbelt Rentals UK, whose first column will appear in the Jan-Feb issue..

Having started writing in the magazine in April 2012, Kevin has decided that now is a good time to call a halt, although he will remain active in the industry in a number of board-

level roles, and may indeed write the occasional article for *IRN* in the future.

In his final column (p11) he writes; "The thing I appreciate most about the rental business at its best, is the down-to-earth style of its people and their courage to take bold decisions to get things done. I can assure readers that this combination is far from a given across the many other industries in which I work, and is something we should do our absolute best to protect and cultivate."

On page 13 we have a short Q&A with our new columnist, Andy Wright, who has several decades experience in the equipment rental sector with companies including Aggreko, Speedy and Lavendon, and now with Sunbelt Rentals UK, where he became CEO in early 2020.

We offer our sincere thanks to Kevin for his remarkable contribution over the past nine years – lucid, thoughtful and gently provocative – and welcome Andy to his new role as our columnist.

IRN Rental Share Index

COMPANY		SHARE PRICES			
		Start date 07/01/06	Previous mth 11/10/21	Current mth 29/11/21	% change
Ashtead Group (UK/US)	UK£	1.83	54.8	61.9	+12.9%
Emeco	A\$	–	1.11	0.96	-13.5%
GAM SA (Spain)	€	8	1.55	1.55	0.0%
Herc Rentals	US\$	–	167.2	180.5	+8.0%
HSS Hire	UK£	–	0.18	0.16	-11.1%
H&E Equipment	US\$	–	38.2	43.81	+14.5%
Kanamoto	Yen	841	2591	2173	-16.1%
Nishio Rent All	Yen	2480	2855	2523	-11.6%
Speedy Hire (UK)	UK£	8.32	0.61	0.64	+4.9%
United Rentals (US)	US\$	24.9	342.5	357.8	+4.5%
VP PLC	UK£	2.74	10.1	9.5	-5.6%
WillScot	US\$	–	31.5	38.8	+23.2%
IRN INDEX		100	748.7	759.4	+1.4%

Note: The index is based on aggregate changes in market values of the companies in the list. The initial index value of 100 is based on values on 11 January 2006.





Speedy adopts science-based net zero targets

UK equipment rental company Speedy has committed to adopting science-based targets (SBT) to achieve net zero carbon emissions before 2050.

The company said it is the first UK hire company to publicly commit to SBT.

An emissions target is 'science-based' if it is in line with the reductions under the Paris Agreement, to limit global warming to well-below 2°C above pre-industrial levels and pursue efforts to limit warming to 1.5°C.

Speedy's targets will be verified by the Science Based Targets initiative and published, alongside the first year's progress, over the coming financial year.

United Rentals unveils Scope 3 emissions goal

A recent United Rentals' report outlines a heightened focus on sustainability including the tracking and reporting of scope 3 greenhouse gas (GHG) emissions; indirect emissions in a company's value chain.

United's 2020 Corporate Responsibility Report: 'Forward Together' confirmed that this year it has expanded the boundary of its GHG emissions reduction goal to include scope 3 emissions from its third-party haulers, following an evaluation of its scope 3 GHG emissions in 2020.

It has also committed to reduce GHG emissions intensity by 35% by 2030 from its 2018 baseline.

Among the strategies for reducing emissions, United was collaborating with OEMs and customers to reduce



United is tracking Scope 3 emissions.

Scope 3 emissions from rented equipment at jobsites, the report said.

A spokesperson contacted by *IRN* confirmed Scope 3 was a focus of United's overall sustainability strategy, and that United was engaged in ongoing efforts to determine how best to track and report on Scope 3.

Easy Toolhire launches carbon offsetting

The 'Easy' rental online platform has launched a carbon offsetting function that allows rental customers to reduce their impact on the environment with each transaction.

Managed by Rentuu, a cloud-based

platform, the 'easy' rental brand is part of the easyGroup of brands and is backed by investment from the group and Sir Stelios Haji-Ioannou, founder of the easyJet airline.

Rentuu and easyHire co-founder Andrea Guzzoni told *International Rental News* the function "works in a similar way to carbon offsetting when booking a commercial flight."

He confirmed the platform had also utilised the European Rental Association's equipment CO₂ Calculator to make calculations for key clusters of equipment including vehicles and access units.

Easy Toolhire carbon offsetting.

The Trime Group has formed Trime Asia Pacific to market Trime products - including the T-ZERO PRO range of solar and hybrid lighting towers (pictured) and generators - throughout Australia and New Zealand. The group said the new business would operate out of Perth, Western Australia, to meet growing demand for eco-friendly products.



PEOPLE NEWS

■ **Christophe Sanchez** has been appointed Managing Director of Liebherr-France SAS, effective 1 November, replacing his predecessor Martin Schickel, who is retiring after more than 44 years with the company. Sanchez (pictured right) was previously General Director of Liebherr-Location (Liebherr Rentals) France SAS, having taken over the role from Schickel in June 2020.



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In addition to the published magazine, *IRN* provides rental news and information in a variety of formats:

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SCAN TO WATCH
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As IRN columnist Kevin Appleton bids us farewell to move on to the next chapter, he reflects on the ongoing and often inspiring evolution of the rental sector.

After writing this column for, by my estimate, a little over seven years this will be my last. So I'm taking the chance to be a little reflective in today's column. I confess this spirit of reflection feels a bit fraudulent, or at least contrived. My time in rental stretches back to 2002 and will go on beyond today with my continuing involvement at Horizon Platforms and bits and pieces of advisory, speaking and consulting work so I am in no sense retiring or withdrawing from the scene.

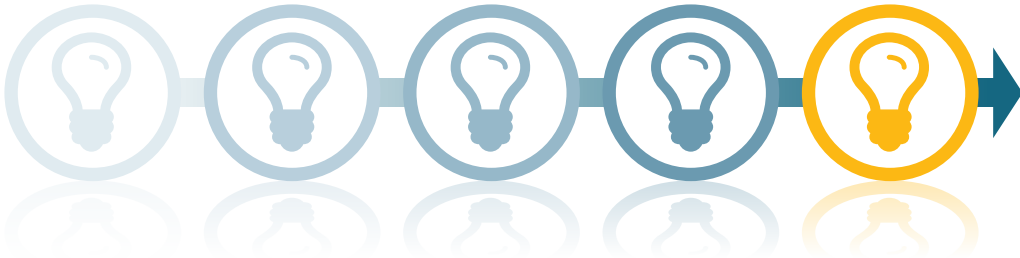
On the other hand, I have learned that if we don't take time to intentionally reflect, we risk missing the opportunity to appreciate the changes that we've been part of, and we also miss the changes that might be the end of us if we don't react to them in good time.

So here are some thoughts on the things that have changed most and those that might yet.



KEVIN APPLETON is an experienced senior executive and advisor in the rental, logistics and construction service industries. He is a former CEO of Lavendon Group and Travis Perkins Builders Merchants and is currently chairman and/or non-executive director of a number of companies in the rental, construction services and logistics sectors. To comment on these articles e-mail: IRNfeedback@khl.com

Farewell



Fine-tuned investments

Data analysis and fact-based decision making are much more prevalent and demanded in the industry now compared to twenty years ago. I well remember my shock at discovering that many companies were making decisions about multi-million equipment investments based on little more than gut-feel. The harvest of this was often to be seen in equipment graveyards in the corners of yards where the units that had been bought on the basis of "Fred's hunch" stood and rusted until they were eventually broken up or sold for scrap.

I guess these graveyards might still exist, but they are much less prevalent now than then, as rental businesses work hard to identify those units that are in demand and profitable, and place orders accordingly. This, in turn, means that manufacturers are able to produce equipment that is truly demanded by the marketplace, rather than producing on faith and hoping someone buys the latest product design engineer's creation, whether or not it serves a genuine end-user need. This means much less waste overall in the supply chain – good for manufacturers, good for financial returns, good for customers and good for the planet.

I guess linked to this is the substantial growth in overall professionalism in the industry. Back in the day the gulf between the worst service provider (or branch) and the best was huge. This was due to the fact that service (and financial) performance very

much revolved around the intelligence, work ethic and active involvement of the business owner or branch manager. Staff were often treated poorly, and rather autocratic and chaotic management styles were often in evidence.

Standard-setting

Wherever there are humans there will be stupidity – I am personal proof of this – but the general trajectory over the past few years has been towards much greater and better use of systems and well-defined procedures. The importance of independent accreditation has grown, and this has helped ensure there is at least a minimum focus on how the business runs, irrespective of who's in charge on any given day. For this reason, although there is still a bandwidth of outcomes, real horror stories around service, leadership style or health and safety practice are mercifully much fewer than in the industry's earlier years. It has also made it easier to introduce and retain new staff to the industry, without expecting them to learn everything through a combination of word of mouth and trial and error.

I wrote in my last column about changes that I expected to see in the future of the industry and, unsurprisingly, I would put increased use of technology and automation to limit non-value-added human interventions near the top of the list. We also all seem duty-bound to play a role in our species' battle to reverse our damaging impact on the planet. We may be a small player in this battle, but we can and should still contribute.

Courage and vision

It has been pure privilege for me to make many friends and good acquaintances in this industry over the years of my involvement. Indeed, one of my industry friends, Andy Wright, will become the new face and voice of this column. I wish him all the best in doing so.

The thing I appreciate most about the rental business at its best, is the down-to-earth style of its people and their courage to take bold decisions to get things done. I can assure readers that this combination is far from a given across the many other industries in which I work, and is something we should do our absolute best to acknowledge, protect and cultivate.

My best wishes to you all for your continued endeavours.

IRN

“ We all seem duty-bound to play a role in our species' battle to reverse our damaging impact on the planet. We may be a small player in this battle, but we can and should still contribute. ”



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Our new columnist Andy Wright

From January, Andy Wright, CEO of Sunbelt Rentals UK, is taking over from Kevin Appleton as *IRN*'s regular columnist. He has a rich rental background, including leadership roles at Speedy, Aggreko and Lavendon Group. We asked him about his rental career.

***IRN*: HOW MANY YEARS HAVE YOU BEEN IN THE RENTAL INDUSTRY AND WHAT FIRST ATTRACTED YOU TO IT?**

AW: I joined in 1989 and it was my first opportunity to move into a sales role, therefore 32 years (gulp).

HOW DID YOU FIRST ENTER THE INDUSTRY?

I joined Aggreko as a Sales Engineer at its Doncaster depot, which was the fifth depot to open in the UK.

WHAT HAVE BEEN SOME OF THE KEY MILESTONES IN YOUR RENTAL CAREER?

My first Managing Director role was as MD Northern Europe for Aggreko in 2000. I then became UK Chief Executive, Lavendon Group in 2007, followed by International Chief Executive at Lavendon Group in 2010, then Managing Director UK & Ireland at Speedy Services in 2018, and finally CEO of Sunbelt Rentals UK from 2020 to date.

WHAT IS IT ABOUT RENTAL THAT YOU STILL FIND COMPELLING AFTER ALL THESE YEARS?

Great people, great customers, and a strong culture. I've made lifelong friendships and relationships in this sector.

WHAT ARE SOME OF THE CHALLENGES AND OPPORTUNITIES IN TODAY'S RENTAL INDUSTRY?

We stand at a crossroads. Challenges and opportunities can be found in the technological transition to lower carbon products, and data and tech-driven transformation. Changing and challenging customer requirements, skills gaps and the development of future leaders within the industry, are also key.

WHERE DO YOU SEE THE RENTAL INDUSTRY IN THREE, FIVE AND 10 YEARS' TIME?

In three years' time, I see evolving rental products through technological change; in five, digitisation will really be driving the growth, efficiency and consolidation of products, depot footprint and markets. In 10 years' time, we'll be seeing fully connected sites through digitisation, with BIM technology, data provision

and semi- and fully autonomous equipment enhancing efficiency, safety and carbon reduction.

WHAT CAN *IRN* READERS EXPECT TO READ IN YOUR COLUMNS?

I'll be addressing the current issues in this changing sector, providing a senior operational perspective on the significant challenges that all aspects of the industry will face, given the seismic changes happening now and in the future.

I'd like to think that I will provide food for thought, as well as raise some debate amongst the rental community. And of course, this is also a good opportunity for me to emphasise that this column is written from my personal viewpoint and does not represent the official view of Sunbelt Rentals or Ashtead Group. ***IRN***

Andy's first column will be published in the January-February issue of *IRN*.

“ Challenges and opportunities can be found in the technological transition to lower carbon products, and data and tech-driven transformation. ”

ANDY WRIGHT, CEO, Sunbelt Rentals UK.





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The recently opened Cat Rental Store in Abidjan, the Ivory Coast.

Manutention Africaine
Côte d'Ivoire

CAT

African growth

Caterpillar dealer JA Delmas is finding demand for rental services in West Africa, and it's growing. Murray Pollok spoke to the company.

The fact that JA Delmas employs hundreds of equipment operators in its West African operations tells you immediately that its rental business is slightly different from the traditional 'non-operated' model found in Europe and North America.

The prominent role that mining plays in the region, which is reflected in demand for large machines, explains the number of operators, but that does not quite tell the whole story of JA Delmas's rental business. The Bordeaux-based company is also developing Cat Rental Stores in several countries and is seeing a general increase in demand for rental.

Denis Paput, Managing Director of JA Delmas - which holds Caterpillar dealerships in 11 countries in West Africa - tells *IRN* that mining represents between 50 and 60% of its total business.

"After mining, you have a more traditional activity for us, which is construction", says Paput, a 27-year veteran at JA Delmas, "We have a long history with construction, mainly roads. Construction is around 25% of our activity today and the remainder is energy and industry."

However, it is rental that is the fastest growing business line; "Rental is still the third or fourth largest regarding turnover, but is clearly the activity with the highest rate of growth."

Denis Paput, Managing Director of JA Delmas, is a 27-year veteran of the France-based Caterpillar dealer.



"Rental today represents around €50 million of turnover, for a company with total revenues near to €600 million. And it's clearly growing very, very fast. It was less than €10 million in 2013."

He says that one out of seven Caterpillar machines its sends to West Africa are for its rental fleet; "If 100 machines, including from our competitors, are sold in West Africa, five are new Cat machines for our rental fleet." It now has a fleet comprising 500 machines, including 300 Caterpillar models.

Shift towards rental

His colleague, Gilles Le Berrigaud, the Rental & Used Manager at JA Delmas, who has worked at the company since 2007, tells *IRN* that every country in the region is different, "but West Africa is very, very attractive because there are lots of projects in terms of mining in certain countries, and where there is less mining there are many construction projects. We have very dynamic countries and lots of projects in the past few years."

Denis Paput says there was already a need for rental services 10 years ago; "We didn't decide to shift towards rental very quickly, but it changed a few years ago. We decided clearly to go, and we have the ability to invest."

"We saw that the rental solution was good for customers", he continues,

JA Delmas

JA Delmas is based in Bordeaux, France and has been trading in West Africa for 167 years. It became a Cat dealer in 1932, and now operates in Benin, Burkina Faso, Gambia, Guinea, Guinea-Bissau, Cote d'Ivoire, Mali, Mauritania, Niger, Senegal and Togo, employing more than 2400 people. There are 23,000 Caterpillar machines operating in the region.

Gilles Le Berrigaud is the Rental & Used Manager at JA Delmas.



"There is a trend in the region. Year after year, rental is considered with more interest by customers. Ten years ago they wanted to own the assets themselves. So, it has not been very fast, but it's a long-term trend, even in West Africa."

He says that more recently, Covid also introduced some uncertainty into the market, which led some customers to consider renting rather than buying equipment.

Mining plays a major role in the economies of West Africa, and it is mainly gold; "Clearly, the gold price is high, which is a good thing for mining companies", says Paput, "So there are projects which continue or new projects to be developed. There are also other minerals, like iron ore, but it's mainly gold."

Covid has had an impact on the region's economies, as everywhere, but he says the countries have proven resilient; "GDP is coming from a low level, depending on the country, but there's clearly huge potential in the coming years. The construction business is clearly at a high level."



"In terms of the general economies, the Ivory Coast is still the locomotive of our region, but in our business, each of the countries can be viewed separately."

As rental develops, so does the structure of the customer base. For example, within construction, the role of major international contractors is diminishing, says Paput, and there is a growth in local players, including some quite large businesses.

"That means that they can operate in three, four, five or six countries in the region. And they are very clearly increasing their quality. And there is a third type of contractor, which is the Chinese. They are probably less present than in parts of East Africa, but they are present and very aggressive."

Mining related rentals

The mining sector, meanwhile, currently accounts for two thirds of the company's rental activity, and it is dominated by international concerns from Australia, South Africa or North America, and include a few Chinese customers; "Chinese companies are less active in mining than construction, but they will be more present in the future", says Paput.

He continues; "Today in mining, we don't yet rent to many customers, but when you rent a large fleet of mining machines you can have a high turnover on one project with one customer. But it's a solution that mining customers are more and more interested in. Maybe not for the full fleet of the operations, but a small part of operational fleet or for construction works in the mine sites."

A good example is a large rental contract with a mine in Burkina Faso; "They are renting for more than three years and for the lifetime of the mine", says Le Berrigaud, "We also have mining customers

who use rental to start their activity very quickly, to make the first stage of the mine and the mine construction. We also have customers who want rental for a peak of activity."

The JA Delmas Country Manager for Burkina Faso, Eric Zouré, gives more background on the project; "Burkina Faso is a big gold mining country and our rental activities are mainly in mining operations. One big project started at the end of 2015 with three machines and in December 2016 we signed the initial contract for the mobilisation of machines and started with a fleet of 14 machines. A workshop was quickly set up and progressively the fleet evolved to reach 27 machines in 2019. And we have a 23 machine on the site today."

These machines are used in the mining process, and not on the construction of the mine, include 90 tonne Cat 390 excavators, three 150 tonne 6015 mining shovels, and 14 of the 100 tonne Cat 777 haulers.

"The customer used to buy machines", says Zouré, "The site where we manage to rent, the customers had mainly Komatsu trucks. They didn't rent on this site before, so it was a way for us to offer a solution to the customer and also a tool to compete." He adds that the company is currently negotiating for other projects.

Denis Paput says the goal is to develop other deals in countries like Mali, Ivory Coast and Guinea, with mining customers and for mining operations; "We have another rental deal in Mali. The fleet, although not as big as the

Eric Zouré, the JA Delmas Country Manager for Burkina Faso.



Burkina project, is already significant for mining operations."

It is also a quite distinctive kind of rental business, involving a lot of staff and operators. In Burkina Faso alone the company has 100 equipment operators and 200 rental-related staff.

Says Paput; "We have the strategy to operate the rental machines ourselves. It's requested by our customers, but it's also an important point on our side. The rental business involves a lot of people, because especially in mining you need maybe four or five operators for each machine, probably more on mining operations, because it's working 24 hours a day, seven days a week.

Not just mining

Mining may be important, but JA Delmas is doing a lot more to develop rental in the region. For example, it is working to develop Cat Rental Stores. Last year is established a store in Abidjan, the Ivory Coast.

"It's inspired by the experiences and successes from European Cat dealers", says Gilles Le Berrigaud, "and with the help of Caterpillar we launched it, but with specific, local solutions.

"We can rent large equipment for the long term, and large mining customers, but definitely we want to promote the rental of small equipment for short-term, a few days or few weeks. And we strongly believe in the growth of this type of rental in our market."

The product range includes lighting towers, small generators, compactors, compact loaders, as well as a small number of aerial platforms.

"The idea is to propose a wide range,

The new Abidjan Cat Rental Store is in a city centre location, and separate from JA Delmas's main office in the city.



the right portfolio of small equipment to various customers. We definitely think that this will promote rental and promote our company", says Le Berrigaud.

The Abidjan store is a separate location from the main Delmas office in the city; "It is totally separated", says Paput, "A different location with different equipment. That makes the distinction between the two rental proposals: this is two different ways of renting equipment.

"It is a site which is located more in the centre of the city, so it's more visible. It is a different target customer, so it was important to do it with a site in the centre of the city."

Le Berrigaud says Covid delayed the launch last year, but that it has been a very good experience; "We are testing the market and are very eager to understand and to get customer feedback, to confirm what equipment, what kind of operation, what kind of service they need."

Paput says it is too early to talk about its financial performance; "but it adds value besides being a pure rental business or rental store business. It's also a question of visibility. I have a lot of people coming to me saying, 'I saw your rental store, your new location in Abidjan'."

JA Delmas is now considering Cat Store launches in other countries, such as Senegal, as well as a second store in the Ivory Coast. Is there a target number; could there be 10 stores within five years? "It could be the case", he says, "but it's too soon to announce that we will develop as fast as that."

Many of the West African countries are dominated by the central city. Paput says it is not a problem to serve customers from these cities for longer duration periods, "But clearly if we want to develop the short-term rental of Cat machines it will be difficult if we don't have a location based near the operations of customers.

"We have this perspective on the future. But today, we have machines in only one main site in each country, even if there are a few exceptions."

What about competitors in the rental market? Denis Paput says the need for capital investment in rental is limiting its wider development; "Rental is not yet a priority for our competitors, and it's also a new activity which needs CapEx and cash. Today, not many manufacturers are developing rental.

"Regarding pure rental companies, there are different type of companies in West Africa. You have many small, informal companies and you can rent from them, but I don't know if we can consider them as offering the same the same service as us, but it's a form of competition. And you have also a few rental companies which try to develop this business, and sometimes they buy Cat machines."

Power rentals

Gilles Le Berrigaud adds that existing rental companies are often specialists in forklifts or handling equipment. Paput says it is not easy to have a clear view of the market; "For rental, although we try to study the competition, it's difficult to get statistics and clear data."

One other aspect of the Delmas rental strategy is power rentals. Le Berrigaud says it is a big market because of the vulnerabilities of national grids and increasing demand for electricity; "We definitely want to develop this activity, and also with smaller generators for contractors."

He says the market will be installations using gensets in the 10 KVA to 1000 kVA range; "We have in our region some rental projects over 50 MW rental, but that is a totally different business. We will operate more on the smaller generators or power plants from 10 KVA up to 2 to 10 MW." JA Delmas has a sister company, Africa Power Services, which is 100% focused on power, including rental.

In any case, JA Delmas has full hands with the development of smaller equipment rentals through its Cat Rental Stores and mining rentals. It seems it will have more equipment operators on its books in the coming years.

IRN



Pictured are articulated dump trucks ready for delivery in Burkina Faso.

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Call for award entries



The date and deadline for entries have been set for the ERA Awards 2022.

The 15th European Rental Awards will take place on the evening of 15 June 2022, during the ERA Convention in Riga, Latvia on 15 and 16 June, 2022.

The deadline for entries is **Friday 25 February**. The entry form and award judging criteria will be available soon from **www.khl.com/rentalawards**

The 2022 awards categories will be:

- Small Rental Company of the Year
- Large Rental Company of the Year
- Rental Product of the Year
- Best Digital Innovation by a Rental Company
- ERA Sustainability Committee Award: Best Carbon Reduction Initiative
- ERA Technical Committee Award
- Rental Person of the Year
- Lifetime Achievement Award

The Awards are jointly organised by the European Rental Association (ERA) and *International Rental News (IRN)*.

They will form part of the ERA Convention 2022. For more information, visit **www.erarental.org IRN**



The 2021 European Rental Awards in Amsterdam.



Photos by Maurice Vinken, www.kleurstof.eu. Courtesy ERA.



This year's Showman's Show was held at the Newbury venue on 20 and 21 October. Next year's dates are 19-20 October.

The UK's exhibition for the events sector, the Showman's Show, returned in October after an enforced pandemic break. Events veteran Graham Crisp reports for *IRN*.

Events recovery?

The event industry is a tight-knit enterprise, with often a friendly rivalry between competitors. This was evident at the Newbury Showground, with *IRN* observing lots of cordial greetings, smiles and hugs around the Show after its enforced absence.

One such welcome was conveyed to *IRN* on the GAP Group stand. GAP are probably best well known for their work in construction related markets, however they do have a thriving event hire division, managed by Richard Judge.

Judge said the division had experienced "tough times" during the lockdown, but that they were already experiencing considerable growth in the event markets: recently they crammed "three months of work into just two months."

The company used the downturn to assess its equipment range, with one consequence being investment in a new plastic temporary flooring system and metal front-of-stage barriers. He added that they would be heavily promoting low emissions products such as solar lighting and hybrid units.

Growing demand

US temporary flooring producer Signature Systems displayed a range of flooring systems all manufactured in their Orlando, Florida facility. Signature's UK representative Tony Booth explained there had been extensive demand for his equipment from UK rental firms supplying some of the country's large infrastructure projects, such as HS2.

Booth said its SignaRoad panels, manufactured from HDPE plastic, had become one a popular product with rental and event markets, because of its durability, compact size and ease of installation. He added that he expected more demand from rental firms with events and festivals to flourish in 2022.

Interestingly, rental giant Sunbelt Rentals UK chose not to display equipment at the Show, instead, treating visitors to a massive wide-screen monitor, set up inside a cosy marquee, that demonstrated a large part of their rental fleet in action. One item that caught *IRN*'s eye was an electric bicycle that was recently filmed being ridden by UK Prime Minister, Boris Johnson.



SPA Power Machinery showed its East Petrol Post Driver, which was developed in Australia by Christie Engineering.

JCB had a large stand packed with telehandlers, forklift trucks and Stage V generators. *IRN* noticed a new 'battery-pack' style generator, although this innovation has yet to be formally launched.

At first glance the Show – which was first held in 1984 – appeared to have less exhibitors in the outside arena than in previous years, however the indoor marquee stands looked to be fully occupied.

The outside areas are where many of the power and lighting exhibitors were located, and what was very noticeable at the Show was the amount of battery/hybrid, and solar/hybrid power systems being used to power individual stands.

Nic Forsdike, Managing Director of power supplier Gofer, showed *IRN* an app that confirmed that his hybrid unit had been powering their stand continually for twenty-four hours, and had only used 13% of the battery power. He was confident that they would complete the Show with zero emissions.

Likewise, Will Docherty of Generator Power enthusiastically handed *IRN* a case study where they partnered with a national UK housebuilder to reduce both their fuel usage and emissions.

Generator Power supplied a 45kVA battery pack >

Autotrak Portable Roadways worked during the pandemic to rent temporary roadways to film sets, Covid testing sites and temporary 'Nightingale' hospitals.



combined with a 60kVA generator on standby, ready to recharge the battery pack when required. During September 2021, the generator ran for 52 hours over a 5-week period which, said Generator Power, reduced the client's fuel bill by more than £4750, with a corresponding CO₂ savings of 13,936kg.

Docherty said that during the winter months they would be monitoring this site via a telemetry system to ensure that all unnecessary items are powered down to save even more fuel and emissions.

Green power

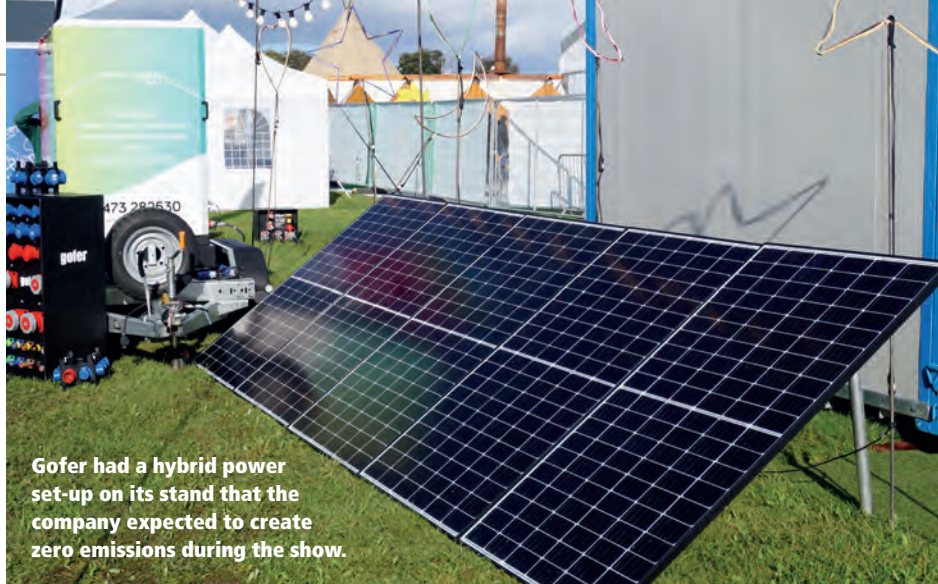
Continuing on the green power theme, *IRN* spotted the imposing HybridPowerSafe unit displayed on the Stuart Power stand. Stuart Power's Russell Tregent, a Director at the company, explained that it was a combination of a 65kVA generator and a 30kVA battery. *IRN* noted the multi-socket arrangement, consisting of 125A 3 phase, alongside an array of 63, 32 and 16A outlets. During August 2021 the HybridPowerSafe set was used on an HS2 project and, according to Power, clients saved £1630 in fuel costs and cut more than 5730kg in CO₂ emissions.

Manchester based Falcon Power was making its Showman's Show debut. Formed in 2015 as a division of Falcon Tower Crane Services, it has more than 400 generators in its fleet, supplied by JCB and Atlas Copco. The fleet ranges from 20 to 1250kVA, with a line of hybrid sets, titled the Hussh Pod range. Mostly known for their industrial applications, *IRN* was told the company had seen steady growth in the events markets, and was actively seeking to extend its services to outside events and festivals.

Hybrid lighting sets were also evident across the Show. The MHM Group had a very busy stand displaying the wide range of generators, fluid storage



Falcon Power was formed in 2015 as a division of Falcon Tower Crane Services.



Gofer had a hybrid power set-up on its stand that the company expected to create zero emissions during the show.

tanks and lighting towers. Managing Director, Mat Llewellyn was eager to show *IRN* the solar-only, emission free lighting tower, the ST-9.

Llewellyn explained that the ST-9 was a self-charging, solar powered lighting set, with a vertical 9m mast fitted with LED lamps. MHM is championing the use of HVO (Hydrotreated Vegetable Oil) renewable diesel and is already using HVO in its own rehire rental fleet, supplied by Crown Oils.

Meanwhile ACE Plant's dust suppression units are widely used in the demolition industry, but are also popular at festivals, dampening down swirling dust which could be a hazard. Keith Whitlock, ACE Plant's National Sales Manager said that events had "taken a big hit" during 2020 due to the pandemic, but infrastructure projects had kept it busy. He was expecting a big rise in event work in 2022.

Naturally, marquees play an important part when setting up an event. Installation and erection can be difficult particularly when there has been a prolonged dry spell. To combat this, Australian manufacturer Christie Engineering has developed a petrol-powered post driver, alongside a range of accessories. Simon Anthony, Director of SPA Power Machinery, which markets the Easy-branded products in Europe, told *IRN* the post drivers were popular with marquee firms, fencing contractors and farmers. They were also available to hire from UK rental businesses.

There were a large number of trackway rental firms dotted around the Show. Nick Russell of Autotrak Portable Roadways informed *IRN* that they had prospered during the pandemic supplying film sets as well as Covid testing sites and the temporary UK 'Nightingale' hospitals. He mentioned that they had invested heavily in plastic trackway panels to complement their traditional aluminium panels.

Russell was another experiencing a substantial upturn in events, and he expects a big rise in 2022.

Mark Pruce, Director of Operations for the temporary trackway supplier CAP TRAC, showed *IRN* a new plastic flooring systems, manufactured exclusively for his company. He confirmed that CAP TRAC were very busy "right now."

Positive outlook

Davis Trackhire have just opened a new depot in Retford, Nottinghamshire, UK. They supply both plastic ground protection mats and heavy-duty aluminium trackway to a broad range of industries. Similar to other firms in the events markets, Davis Trackhire suffered a big business drop early in 2020, but they soon found work in the construction markets, and were quickly back up to full speed.

Away from the equipment side of the Show, *IRN* learned about the Event Hire Association's (EHA) recent link up with the insurance broker, Towergate Insurance Brokers. This partnership jointly launched a new product called HireSecure. The EHA told *IRN* that HireSecure is a "new and improved short-term hire insurance product that covers their members in event of loss, damage, fraudulent hire, theft, vandalism and malicious damage." The product is available on both owned or cross-hired equipment.

Paul Gaze EHA's CEO commented that "2022 is looking like an incredibly busy year for events. Having the security of a short-term insurance product will allow companies to fulfil contracts with minimised risks." The Hire Association Europe (HAE) was formed in 1974 and its' sister association the EHA in 2008.

Computer software is a must for most rental firms. Amelia Reed, Point of Rental's Account Executive, said its new Syrinx 365 system had all the features of the standard Syrinx software with the exception that 365 was cloud based. 365 has also added features such as simple customisation, real-time weather tracking, and an instant messaging service helping to keep team members in close contact at all times.

Finally, and going slightly off-piste, *IRN* was introduced to an all-new range of female urinals, marketed by the cleverly titled company PeeQual Limited. Director Hazel McShane said that the mission was to "pioneer pee-equality that is quick, safe and sustainable". An interesting concept that should help to avoid queuing for the toilets at events and shows. PeeQual is available to buy or rent.

Clearly the events industry is back. Perhaps not "with a bang", as one press release stated, but after a hollow year, the enthusiasm and determination to get back on track was palpable. We wish them well.

The Show will be back 19 - 20 October 2022. **IRN**



Signature Systems showed its new SignaRoad flooring panels, made from HDPE plastic, for events and festivals.

The ninth International Rental Conference (IRC) was held in Shanghai on 25 October, with a stellar line-up of Chinese rental industry speakers.

INTERNATIONAL rental CONFERENCE ASIA

The IRC conference was successfully held in Shanghai, China, on 25 October, attracting an audience of around 300 delegates. The audience saw high-level presentations from companies including LSHM North China, Hitachi Shanghai, JLG, Liugong and rental company Zhongneng United.

The event, being held for the ninth time, is the largest conference in China focusing on the fast-growing equipment rental sector.

Lawrence Luo, CEO of LSHM North China – a major Caterpillar dealer in China – spoke about the future role for equipment dealers in China's rental market, while Tei Gyomei, Managing Director of Hitachi Shanghai, provided a 'masterclass' in rental management techniques.

Zeng Guang'an, Chairman of Liugong, outlined the situation facing the construction equipment industry in China. Host for the day was KHL's Managing Director in China, Cathy Yao.

All-Chinese event

This year's conference was an all-Chinese affair because of the travel restrictions relating to Covid, but two video presentations were shown from foreign speakers.

Paul Wilson and Brent Horne of telematics specialist ZTR discussed how rental companies in Europe and North America are exploiting telematics and data.

Murray Pollok, Managing Editor of *IRN*, highlighted

300 at IRC



Lawrence Luo, CEO of LSHM North China at IRC focused on the role of equipment dealers in China's rental market.



Yang Tian Li, CEO, Zhongneng United.



Zeng Guang An, Chairman of Liugong, with IRC conference host Cathy Yao.



Tei Gyomei, Managing Director of Hitachi Shanghai, speaking in Shanghai.

William Gu, Managing Director, JLG Asia.

Celebrating 10 years

Next year's IRC will be held in Shanghai on Monday 21 November, the day before Bauma China (22-25 November, 2022).

This will be the 10th IRC, so will be a special celebration event. If you are interested in speaking or participating, please contact *IRN*'s Murray Pollok (murray.pollok@khl.com) or in China, Cathy Yao (cathy.yao@khl.com).

some of the key rental trends, such as sustainability, digitalisation and the structure of the rental market.

IRC, which is organised by KHL group and *International Rental News* magazine, took place the day before the APEX Asia exhibition, which saw the largest collection of aerial platforms

of any trade show in Asia this year.

Next year's the conference, the 10th IRC, will be held in Shanghai on 21 November, 2022. **IRN**

Almost 300 delegates attended the 2021 International Rental Conference in Shanghai.



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Pumpset suppliers' latest product releases are positioned to meet rising market demand for fuel efficiency, low maintenance, as well as a range of specialised applications, writes Belinda Smart.



Atlas Copco Power & Flow has launched PAS dewatering surface pumps with HardHat technology.

Pump sets get set

DXB Pump & Power, the UK based manufacturer of high efficiency pumps, has introduced new fuel efficient compact 150mm portable pumpsets, expanding its range of Stage V emission compliant pumps used in sewage bypass and wastewater applications.

Dave Rodgers, DXB Integrate UK Key Account Director, said there had been no new high efficiency

sewage bypass pumpsets launched since the water companies' investment cycle, the AMP5 programme a decade ago. The new pump would respond to demand from contractors and pump hire companies for more environmental Stage V solutions, especially in urban applications like Thames Water or Severn Trent regions.

Launched in November, the WW250/15 utilises a

Cornell Warrior high efficiency cutter impeller, which operates at 1600 rpm to pump up to 60 l/sec at 15m with a 5m suction lift. It also uses less than 3.5 litres of fuel an hour, equivalent to almost three days of run time on a tank. The "high efficiency" six inch (15.25 cm) pump is powered by an 18.5kw Deutz Stage V engine, it generates flows in excess of 95 l/sec or heads over 20m "whilst still passing the most challenging solids contained in raw sewage," according to DXB.

"DXB Pump has optimised its design to generate the industry standard performance using an engine half the size of the leading competitor reducing noise, fuel consumption, pollution and costs of operation not seen before in the UK pump hire industry."

At the other end of the performance range, DXB Pump is launching a high head, high flow WW600/60 pump powered by a Stage V Deutz engine, in a six cylinder, 150kw TCD6.11L6 model.

United Rentals Europe adds product

United Rentals Europe, a subsidiary of United Rentals, is expanding its product offering, with electric submersible pumps and further types of diesel and electric centrifugal pumps.

The company said its pump product line was designed for safety, versatility and "plug and play" compatibility and confirmed "a full range of diesel and electric centrifugal pumps in standard and industrial ranges" will be available.

The range will include pumps that deliver both lower and higher pressure and the majority will be equipped with telemetry, emergency stop switches and automatic level controls for remote monitoring.

Additional diesel and electric centrifugal pumps from Pioneer Pump, which feature the latest emission-compliant Stage V diesel engines, will be added over the coming months.

The new submersible pump range from BBA will also form part of the fleet.

These new pump offerings follow United Rentals Europe's recent rebranding from BakerCorp, which was acquired by United Rentals in 2018.

BBA submersible pumps.



High flow applications

Designed for high flow/high head applications such as those seen in major rising main bypass applications, DXB says it allows contractors to reduce the number of pumpsets on a temporary site by being able to pump over 180 litres a second at heads of up to 60m.

Also using the Warrior cutter impeller, the pumpset comes with >

a patented Cycloseal system in the pump end, reducing seal failure caused by high amounts of sand and grit seen in sewage especially storm water entering the network.

Featuring Deutz six-cylinder engine and DXB in-house designed control panels, the pumpset operates remotely whilst monitoring all aspects of the pump condition including fuel in the tank, DEF in the Ad-blue tank as well as full engine and pump monitoring. Data is available on the digital control panel or via an onboard telemetry system that sends to end users' monitoring services.

Simon Ruffles, Managing Director of DXB Pump & Power said, "DXB now has a complete range of raw sewage pumpsets from 100mm to 250mm capable of handling the worst possible sewage with the cutter impeller but combining that with Stage V emission compliant engines that dramatically reduce fuel burn and emissions regardless of choice of fuel."

"With the price of HVO fuel expected to rise along with white diesel, there is huge pressure on contractors, rental companies and end users alike to reduce the total consumption of fuel in many projects. By designing these pumpsets to run at lower RPM and use high efficiency cutter impeller, some of these pumps halve the fuel consumption of the major competitors on the UK markets."



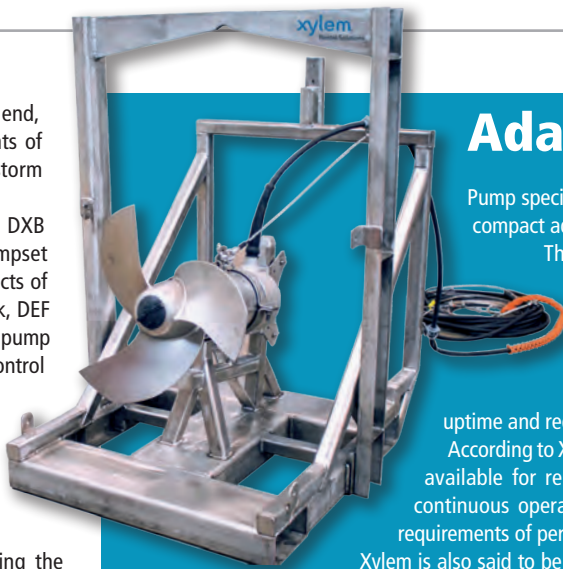
Arctic assistance

UK company Obart Pumps has supplied a free Tsurumi submersible pump to assist Real Ice Real Ice CIC, a North Wales-based start-up that is aiming to help refreeze the Arctic.

Real Ice's wind-powered machines are designed to restore Arctic sea ice and help indigenous communities and wildlife at risk from global warming. Positioned down a hole drilled through the sea ice, the pump from Obart uses electricity generated from a renewable source to lift water from below onto the top of the sea ice. The naturally cold northern environment freezes the water, making new ice that will replenish losses due to climate change.

Pete McMurtie, Sales Director of Obart Pumps confirms the company enlisted the help of the technical team at Tsurumi Europe who provided analysis for the pump.

Real Ice has begun testing the prototype, with initial testing carried out in Wales on 25 and 26 September.



Adaptive mixer

Pump specialist Xylem Rental Solutions has added the Flygt 4220 compact adaptive mixer rental package to its offering.

The mixers are designed to enable water utilities to manage changing mixing conditions in wastewater treatment application by adjusting the mixer output, and offer "enhanced capabilities, including full automation," contributing to "significant energy savings, imposed process resiliency, increased uptime and reduced inventory," the company said.

According to Xylem, Flygt 4220 is the "first and only" mixing product available for rent, to help avoid unplanned downtime and enable continuous operation of plant processes, regardless of maintenance requirements of permanently installed mixing equipment.

Xylem is also said to be the only manufacturer that also installs, commissions and services all rental equipment.

The mixer's compact design is intended for easy transport and installation, while adaptive mixing technology is suitable for applications, including municipal wastewater treatment plants, water utilities and industrial.

Diesel power

Meanwhile Dutch pump manufacturer BBA Pumps has introduced a new diesel driven 8-inch (just over 20.3 cm) mobile pumpset for the rental market. The BA180E D328 mobile pump unit with the Stage V Perkins is a dewatering and sewage pump based on BBA's BA180E, a vacuum assisted centrifugal pump with an open impeller. The pump has a free passage of 80 mm and is equipped with cutting grooves and large inspection covers.

Key features include a maximum pump speed of 1800 rpm, driven by a 3.6 litre 904J Perkins diesel engine. The electronically controlled variable speed engine meets Tier 4 final and Stage V emission requirements, making it suitable for use in both Europe and North America.

DXB's new release responds to demand for environmental Stage V pump solutions.

Also new is a sound attenuated canopy a multilingual LC45 dashboard and forklift pockets and lifting eyes to aid mobility.

Other innovations include automatic start-stop via level control; LED lights integrated in the canopy; composite tanks in liquid-tight and leak-proof base.

Maintenance and repairs

Atlas Copco Power & Flow has launched two new PAS dewatering surface pumps with HardHat technology offering a lightweight yet tough canopy.

Saksham Dube, Product Marketing Manager at Atlas Copco Power & Flow says, "Our HardHat technology is a tough polyethylene resin material proven in the field to protect equipment's most vital and expensive core components.

"It has been incorporated on Atlas Copco's compressor and light tower range for over 15 years and we're delighted to now extend the technology to our PAS pumps so customers can better protect their investment. The canopy on the PAS pump range has traditionally been metal, however, we have worked closely with our customers to fully understand their needs for increased durability on site."

The result is a unit that is maintenance free and resistant to discoloration.

Featuring hinged door design, the pumps provide are designed for easy serviceability on site and can be cleaned and restarted in three minutes and serviced in under 60 minutes, 10% quicker than previous models.

Meanwhile, Saksham Dube, Product Marketing Manager at Atlas Copco Power & Flow, says design improvements have been introduced to deal with inaccessible hydraulics and the need to disassemble Atlas Copco high-head pumps.

The result is improved 'mean time to repair' (MTTR) of up to 30%, says Dube, adding that spare parts and training are also provided through Atlas Copco's global network.

"The issue of ready access to the pump hydraulics has been addressed with development of an innovative hinge kit. This comprises a 'swing door' that allows quick and easy access to the pump's internal workings."

Maintenance is also enabled by a single bolt to remove the impeller, while link belts are used to enable changeovers without having to dismantle the entire wet end of the unit. The semi-cartridge



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DAE's Growler dredge pump.

Selwood joins sustainability school

UK pump specialist Selwood has partnered with UK collaborative organisation and resource The Supply Chain Sustainability School. Announced September, the move reflects a commitment to sustainability, Selwood says, both within the business and in engaging with customers and suppliers.

Richard Brown, Selwood CEO, says, "We believe that partnering with the Supply Chain Sustainability School will not only improve our understanding of sustainability but ensure that we can continue to add value to our clients in supporting them in achieving their own environmental responsibility objectives."

Selwood's other sustainability measures include hydrogenated vegetable oil (HVO) as an optional alternative to diesel and the use of electric engines. It has developed remote telematics technology to enable customers to monitor and minimise the fuel consumption of its pumps by reducing idling times and unnecessary refuelling trips. It also uses electric vehicles in its fleet wherever possible and offers greener solutions where appropriate – for example by using gravity-fed siphoning systems as an alternative to powered overpumping.



This year Selwood opened multi-million-pound solutions centre in Crayford, southeast London, adding to its existing centre in North Wales. The London site hosts a new "stopper centre" offering products including pipe stoppers; inflatable and re-useable bungs used for blanking off pipework.

Selwood sustainable products, part of a wider company drive.

seal design allows seal access and replacement from the front, while an integral seal oil bath prevents damage if the pump runs dry, and a visual inspection port makes leakage inspection simple.

Meanwhile a closed impeller equipped with deflector vanes improves thrust balance on the shaft and impeller to minimise wear and keep the mechanical seal clean.

Atlas Copco Power & Flow says the pumps also

come equipped with a range of useful features including QR codes containing information about parts and spares.

Excavator mounted

US manufacturer DAE Pumps has extended its excavator accessory equipment with the Growler series of hydraulic excavator-mounted dredge pumps. Able to connect directly to the arm of any

excavator, the Growler reduces the time and labour needed for dredging sediment, sand, and other mixed soils and transferring material in seconds.

An excavator-mounted dredge pump replaces the bucket on the excavator, and discharge slurry hose for transporting material eliminates the need for haul trucks. The hydraulic pump and two side agitators for loosening and moving material are powered directly by the hydraulics of the excavator's engine.

Heavy-duty pumps are available in multiple sizes and powers to fit different types and sizes of excavators and applications. Three-inch and four-inch models can move from 10 to 50 cubic yards of material per hour and the 16-inch unit is capable of moving up to 650 cubic yards per hour.

Made of hi-chrome metal to move the most abrasive material, DAE says the Growler excavator-mounted dredge pumps provide the durability and strength to perform in harsh environments. **IRN**

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DXB Pump & Power have announced the highly anticipated WW250/15 pumpset to the market. The new pumpset is built with sustainability in mind, and offers a Stage 5 engine with no adblue or DPF. It is made for the wastewater industry and its robust cutter impeller works

superbly with raw sewage and rags. With a low fuel burn at 250m³/hr at 1.5bar, it is super efficient. The WW250/15 has the capability to work in environments up to 50 degrees celsius and runs telemetry – giving customers full control around the world!

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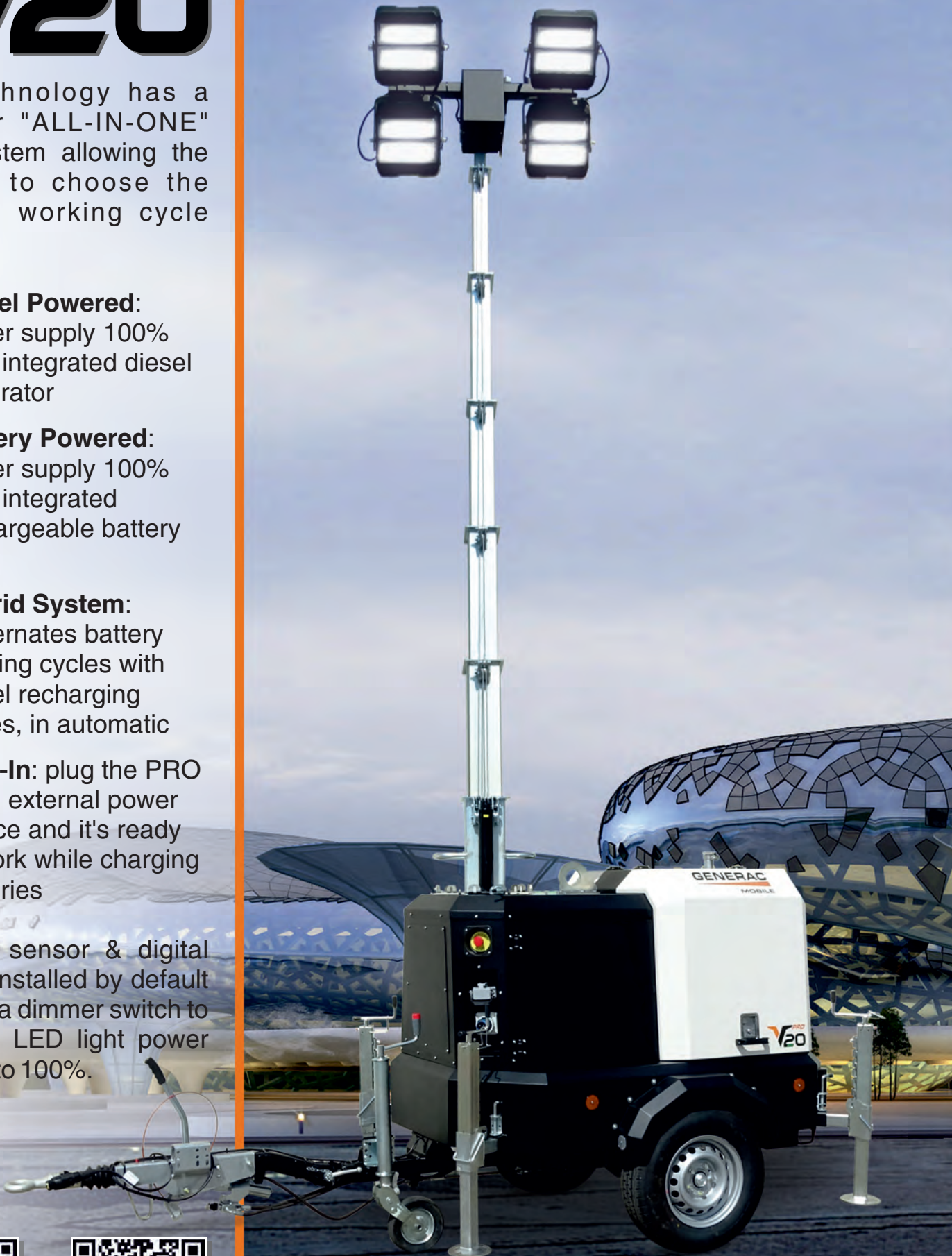
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The FS 7.32 Compact from Faresin uses Internet of Things (IoT) technology.

Lifting the game

Telehandlers are in high demand in rental for construction, mining and quarrying, forestry, logistics and agriculture, with compact versions rolling out for urban projects, and this year also marking the release of the “world’s tallest” telehandler. Aside from questions of scale, low emissions and smart technology are also drawcards in the category.

Doubling production

A key launch for October was the launch of Bobcat’s R-Series telehandler range; 12 models with Stage V engines covering lifting heights from 6 to 18 m and maximum lifting capacities between 2.6 and 4.1 tonnes.

The R-Series comprises compact telescopic loaders - TL26.60, TL30.60 and TL30.70; middle range telehandlers - TL35.70, T35.105, T35.105L and T36.120SL and high lift telehandlers - T35.130S, T35.130SLP, T35.140S, T41.140SLP and T40.180SLP.

Launched under the ‘Next is Now’ initiative, Bobcat says the new models are part of plans to double the production of its telehandlers by 2025.

Meanwhile in late 2020 Bobcat also unveiled the result of its collaboration with Italian rotating telehandler specialist Magni to launch a new range of products, sold under the Bobcat name, and designed for Europe, the Middle East and Africa (EMEA), Russia and CIS countries.

Also in October, Italian manufacturer Faresin

Driven by rebounding construction activity, the telehandler market across Europe and North America is reaching new heights, literally, while compact models and a range of other benefits are also emerging, writes Belinda Smart.

Heavy loads from Haulotte

Haulotte offers a compact range with a lift capacity from 2.99 to four tons, up to a height of 10m; a high lift range able to lift four tons up to 17m, and a heavy load capacity range adapted for loads up to 5.2 tons. The HTL3207 STAGE V has a lifting capacity of 3200 and a maximum lifting height of 7; HTL3210 STAGE V had a maximum lifting capacity of 3200 and a maximum lifting height of 10; the HTL3510 STAGE V has lifting capacity of 3500 and a maximum lifting height of 10; through to HTL4017 STAGE V maximum lifting capacity: 4000 and maximum lifting height of 17.

presented a video preview of the FS 7.32 Compact, representing a “paradigm shift with an eye to the future” due to the integration of Internet of Things (IoT) technology.

The FS 7.32 is a compact telehandler with 3.2 t maximum lifting capacity and a maximum lifting height of 7.1 m, a steering angle of 37° and a turning radius of only 3.8 m on a wheelbase of 2.95 m.

There are five engines for the FS 7.32, all 4-cylinder Deutz from 2.9 to 3.6 dm³, water-cooled >



The MRT 2260 from Manitu’s Vision+ range.



October saw the unveiling of a hydrogen powered loadall telescopic handler from JCB. JCB’s hydrogen technology, on show at COP26 in Glasgow from 31 October to 12 November, is a focus for the company.

with power ratings from 55.4 kW to 100 kW. All comply with Stage V emission regulations thanks to after-treatment technology.

Comfort and safety

Unveiled via digital launch in July, AUSA's new telescopic handlers - the T204H and T235H, have retained the same name as their previous versions but have been redesigned for better user experience.

The spacious design of the cab and the placement of the boom give the operator a 360° view, while other features include terrain adaptability thanks to 4x4x4 drive and the three steering modes: front-wheel, all-wheel and crab mode.

The T204H has a 2,000 kg payload and a maximum lift of 4.2m. The T235H can carry up to 2,300 kg and has a maximum lift of 5m. Both models have the same platform and features, including Kubota engine with 32.5 kW of power.

July also saw Manitou Group partner with rental giant Loxam to launch LoxSafe telehandlers. The new 14m and 18m telehandlers feature connected safety devices, safety alerts to support driving and operation, and telematics for reporting.

They also include new equipment including a side safety bar, a rear reversing radar with audible warning, an open door alert, sensors and alerts for tilting risk, and a safety belt.

The move follows Manitou's announcement in April of the extension of its rotating telehandler offering, now systemised into three segments: compact fixed telehandlers, ultra-compact telehandlers and articulated loaders, with the new ranges boasting "even lower Total Cost of Ownership".

The overhaul was launched at a digital "Build The Future" event in April and entailed the renaming of its two ranges Vision and Vision+.



Smallest to tallest

At 2020 Conexpo-Con/Agg in March 2020, Snorkel unveiled two models; at the smallest end of the range was the world's first electric lithium-ion battery powered compact rough terrain telehandler, the Snorkel SR626E (pictured left), with a maximum lifting capacity of 2,600kg and a lift height of up to 5.79m. Snorkel's largest telehandler model to date, the diesel-powered SR1065, able to reach up to 9.5m, was also launched.

The XR1585-C, from Snorkel's sister brand Xtreme, is the world's tallest fixed boom telehandler with a maximum lift height of 25.9m. Xtreme telehandlers (below) are primarily sold in North America to contractors, due to their long working life and higher initial purchase price, however, the XR1585-C demonstrates the category's possibilities.



With a height of less than 2m and a width of around 1.60m, the 1445 is Kramer's smallest telehandler.

All-rounder

Other recent releases, in July, were Kramer's two new models: the 1445 - a compact telescopic - and the 3610 - an "all-rounder" with a 9.5m stacking height.

The 1445 is Kramer's smallest telehandler and replaces the 1245, with a height of less than 2m and a width of around 1.60m- and an operating weight of approximately 3,000 kg.

The 3610 offers new lift heights and transmission ranges. The machine has one length (without bucket) of just 5.03m and is 2.28m wide, making it the "perfect all-rounder."

With an operating weight of 8,200 kg (depending on options) and compact dimensions, the 3610 achieves a maximum stacking height of 9.50m and a maximum payload of 3,600 kg.

Lower TCO

With total cost of ownership increasingly a focus for end-users and rental companies, earlier this year Genie introduced the GTH-1056 for the North American market, designed to lower TCO by 10% while providing 20% more lift capacity at maximum height.

Launched in February, it builds on the previous GTH-636 and GTH-846 models, retaining a side-mounted engine and stronger boom design. Able to lift 2,268 kg at maximum height of 17.25 m, and 1,361 kg at maximum reach of 12.8 m, it has a 30% stronger boom and chassis, while the boom with mid-pivot point uses a single lift cylinder.

"This simpler configuration, combined with a wider, stiffer horsehead efficiently transfers loads in applications imposing high stress on the boom, such as pipe handling or suspended loads," says Josh Taylor, Genie Product Manager.

In addition to the 120 HP Deutz engine with four-speed powershift transmission, Genie also offers a 74 HP Deutz Tier 4f engine with 3-speed powershift transmission or with Continuously Variable Transmission (CVT).

For rental, the 74 HP, DEF-free engine option is said to be a low-maintenance solution, while CVT delivers performance on par with the 120 HP engine, but with a lower purchase cost and better fuel efficiency.

Genie's GTH-1056 is designed to lower TCO by 10% while providing 20% more lift capacity at maximum height.



Described as "the industry's only new telehandler product line with a traversing boom carriage with the capability to move loads by travelling horizontally" is Pettibone's Traverse T1056X telehandler, the first 10,000-pound-capacity Traverse model in its X-Series. Released in September for the US market, it has a lift height of around 17m and the traversing boom extends the machine's maximum forward reach to around 14m.





JLG's 2733 features attachments enabling it to replace other machines with higher rental rates, such as wheel loaders.

of engine horsepower, torque, and hydraulic performance to enable smaller engines to deliver the same on-site job performance as higher-powered units.

Other changes to Skyjack's TH series include an updated tilt compensation cylinder configuration to use a dual cylinder setup for better distribution of load and improved reliability. Meanwhile a high-pressure filter has also been added to the hydraulic system to complement the oil return filter and further reduce the risk of contamination.

The main boom pivot bearings have also been updated to greaseless bearings, removing the need for end users to grease and maintain on job sites.

Skyjack's TH Series is supported by Smartorque technology.



Versatility is another plus in telehandlers, particularly for rental. In April, JLG introduced high-capacity model, the 2733 for the North American market, with 12065.5 kg maximum capacity making it the highest capacity telehandler that JLG offers. It is built to handle and haul heavy, bulky materials; load and unload trucks and trailers; and help maintenance and repair personnel work on larger fleet equipment. It offers 10.05m of maximum lifting height and a 3628.7 kg capacity at maximum reach.

John Boehme, JLG senior product manager, telehandlers, says specialised attachments mean it can replace other machines with higher rental rates.

"The 2733 can take the place of wheel loaders, in certain applications where greater lift height and forward reach is desired. Compared to a wheel loader, the 2733 offers greater versatility due to its lift height and forward reach."

Meanwhile, JLG and Italian manufacturer Dieci have signed an agreement for the introduction of new rotary telehandlers for the North American market. The line will initially consist of three models, the JLG R1370, R1385 and R11100 with max lift heights from 20.5m to 29.5m and lift capacity up to 5,987 kg.

IRN

Rental friendly

Earlier this year, Skyjack rolled out design improvements to its North American TH series telehandlers to increase uptime by reducing maintenance requirements.

The result is the addition of trademarked Smartorque technology that uses a balance

Used telehandler prices soar in Europe

Data on the Europe market from Mascus.com, Ritchie Bros.' equipment listings website, shows the current low availability of telescopic handlers in the used equipment market has caused a +31% increase in the median price compared to Q3 last year.

During Q3 2021, the number of used telescopic handlers listed for sale on Mascus was lower compared to Q3 2020. During that period, Ritchie Bros. sold -47% fewer telescopic handlers across Europe compared to Q3 2020, with utilisation high in the market and long lead times on new machines.

High utilisation has seen the supply of telehandlers coming into the used market drop, while demand continues to be strong. On the demand side, calls from buyers to sellers have increased by +12%, while email enquiries have decreased slightly by -9% compared to last year.



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JCB's 1TE electric dumper is designed to work indoors, underground and in emissions-sensitive areas.

Winning qualities

Ausa's DR601AHG wheeled dumper with reversible drive has taken out the Gold Award in the 'New machinery developments' category at the latest edition of the Technical Innovations awards, organised by Spanish machinery and construction trade show Smopyc.

The jury recognised "R&D&I, quality, environmental engagement, sustainability and safety at work" in the dumper. Another key highlight of the DR601AHG, which features hydrostatic transmission and a Stage V engine, was "the reversibility of the driving position, allowing driving in the direction of the hopper or in the opposite direction, without having to stop the machine."

Ausa showcased the DR601AHG and a range of machines at Smopyc in Zaragoza from 17 to 20 November.

Other Ausa dumpers on display included the new D1001APG, Ausa's largest model, with a 10,000 kg payload and a swing skip, the D450AHG with a 4,500 kg payload and hydrostatic transmission, the D300AHG with a 3,000 kg payload, the compact D150AHA with 1,500 kg and skip tipping at height and the D201RHGS rigid dumper with a 2,000 kg payload and hydrostatic transmission.

Dumpers that deliver

Avital and fuel-efficient workhorse on many construction sites where substantial loads need shifting, but manoeuvrability is also required, site dumpers' latest releases respond to the need for low or zero emissions. Meanwhile safety features to eliminate common risks such as tilting or overturning are an ongoing focus for both wheeled and tracked versions.

In October, JCB launched its first electric site dumper, a one-tonne high-tip model powered by lithium-ion battery technology. Designed to work indoors, underground and in emissions-sensitive areas, the 1TE electric dumper is positioned as a partner for JCB's 19C-1E electric mini excavator.

Zero emissions

Key features include zero emissions and low noise levels, fast charge capability, full-shift operation in typical use, and a high-tip skip design to allow loading into skips and larger containers.

"The 1T-E site dumper is a durable, compact machine with a full steel skip and heavy-duty articulated chassis. The machine replaces the individual wheel motors of the hydrostatic 1T-2 with conventional drive axles and a drop box, to >

New site dumper releases are meeting demand for low emissions, compact options and safety, writes Belinda Smart.



Mecalac is introducing optional hydrostatic transmission (HST) to its MDX site dumpers.



© MECALAC

Volvo Autonomous Solutions and Holcim Switzerland, a supplier of concrete and aggregate products, have partnered to develop and test autonomous electric haulers in a limestone quarry in Switzerland. Volvo says the haulers are quieter, more sustainable and safer than conventional haulers.





Zero emissions & maintenance

Launched in August as part of Kubota's Smart Energy Solutions range, the KC70H-4e fully electric site dumper is fitted with a low noise 48V lithium battery engine that can be charged up to 80% in just 1.5 hours, with a single three-hour charge providing a full day's work. An electric version of the Kubota KC70, the zero emission KC70H-4e, weighs 590kg and has a 700kg load capacity. The motor, battery and inverter mean the KC70H-4e dumper are said to require zero maintenance.

provide full-time all-wheel drive. A 7kW hydraulic motor delivers drive to the drop box, while a second hydraulic pump is used to power the machine's standard hydraulic circuit, for steering and skip lift.

"Power is supplied by two 5kWh lithium-ion batteries, capable of providing full shift operation in normal use. The batteries can be recharged from conventional site electrical supplies, with 110V and 230V cables available. In addition, the optional JCB Universal Charger can be used to rapid charge the batteries for extended operation.

"Designed for the European and North American markets, the 1TE delivers zero emissions at the point of use and low noise levels, making it ideal for indoor, underground and emissions-sensitive working sites."

Meanwhile, JCB's smaller site dumper, the 1T-2, which took out the prize for Hire Industry Product of the Year at the Hire Awards of Excellence 2021 in May, is a Stage V compliant 1.0-tonne site dumper equipped with a drive inhibit system, preventing travel unless the seatbelt is in use. It also has an initial movement alarm that provides an audible warning before forward or reverse travel commences.

Another feature is the Smart Safety pack which includes an intelligent tilt warning system using technology from JCB's Loadall telescopic handler range. This sounds an alarm when the skip is raised with the dumper sitting on dangerously uneven ground.

There is also an option to specify the machine with

a wider track for additional stability, with an increase in wheel offset to raise the width of the machine from 850mm to 988mm.

HST upgrades

In July, France's Mecalac unveiled innovations to its MDX site dumper range, the first of which will see all new six-tonne 6MDX and nine-tonne 9MDX model fitted with optional hydrostatic transmission (HST), while the second offers a ROPS (Roll-Over Protective Structure) foldable roll bar, making the cabin optional on new models.

HST replaces mechanical transmission with fixed gear ratios, ensuring easier operation without gear shifting and enabling responsive dynamic braking. Mecalac says the result is easier and safer operation for experienced and new operators, well suited to rental fleets.

The 6MDX and 9MDX can be fitted with an isolated MDX cab to minimise vibration and noise, while optional air-conditioning provides operator well-being in all weather conditions. The certified ROPS/FOPS MDX cab has been designed and tested to withstand impacts while loading the dumper skip.

Easy operation

Wacker Neuson's DW30 wheeled dumper, introduced late 2020, operates at 25 km/h with four tons of payload in total. With a diesel engine that meets Stage V standards, the machine has a compact design and articulated pivot point for manoeuvring on tight jobsites and rough terrain, while hydrostatic all-wheel drive eliminates gear changes for easy operation.



The TC350d is Messersì's largest track dumper, with a 3500 kg payload.

Both new models will be available with either an integrated cab or new ROPS foldable roll bar and a handle and gas strut to enable safe folding and unfolding.

Upping the scale

Italian manufacturer Messersì began working on battery-powered mini-dumpers in its Zero Emission line in 2013. It recently announced "the next step in Messersì tracked dumper projects is the new massive five tonne payload model," the TC550d, which is currently in prototype for testing and will be presented at Bauma 2022.

The Messersì range also includes the TC120-e dumper with a capacity of 1200 kg and fully electric transmission.

Its tracked undercarriage is electrically operated with two 2 kW electric motors (one per track) powered by the battery. The track has a patented layout with tilting rollers in the central area of the track to ensure a large support area and high stability.

The TC120-e also has an emergency button and electro-brakes. Its two Lithium-Iron-Phosphate battery packs have 48 cells and a power of 11.5 kW and are positioned to ensure stability.

At the larger end of the scale, positioned as an all-terrain machine, the TC350d is a 2019 model

The HS1203 mini-dumper from Hinowa, "compact and versatile, agile and robust" for construction, renovation, landscaping, work in tunnels or agricultural transport.



A dumper from UK site dumper manufacturer Thwaites recently joined forces with a Kubota excavator to break ground on new headquarters for Staves, the Czechia-based Thwaites distributor, driven by market growth.

Designed and manufactured at Thwaites' UK factory, Thwaites site dumpers are offered in capacities from one tonne to 9 tonnes and distributed to the rental and construction markets in over 70 countries.





shown at the BAUMA 2019 as a prototype and now achieving uptake across Europe.

It has a 3500 kg payload and is equipped with the 180° swivel skip. Controls are pilot assisted using joysticks on the armrests of the driver's seat, which rotates 180° to keep the operator oriented in the direction of travel.

Compact and agile

Positioned as "compact and agile" the TC50-e Zero Emission is the smallest tracked vehicle in Messers's Zero Emission range and has a 500 kg payload. The 660 mm width allows the TC50-e to enter rooms through standard-sized doors, to

access narrow corridors or stair landings.

It has a mixed electric / hydraulic transmission driven by a 5.5 kW electric motor powered by a 28-cell Lithium-Iron-Phosphate battery.

The undercarriage and electro-hydraulic systems have rubber tracks with a width of 180 mm and the TC50-e can overcome slopes of 30% with low noise emissions.

Full charge of the TC50-e battery (Lithium-Iron-Phosphate type) guarantees autonomy of up to six hours.

Meanwhile Hinowa, a manufacturer of tracked mini dumpers for 30 years, introduced the HS701E tracked electric machine as a prototype at Bauma 2019, delivering the first machines in 2020.

Powered by a lithium battery pack (48 V 100 Ah, optional 200 Ah), the machine meets demand for use in indoor and outdoor projects including construction work, renovations, landscaping or in historic centres with low emission zones.

It has no exhaust gases and can operate without the need for a nearby electrical outlet. The battery pack is autonomous for one working day and the machine's compact 750 mm width makes it possible to charge the battery pack at any residual capacity without affecting battery pack life.

Two speeds are offered: 'eco mode' for uneven surfaces and saving battery autonomy, and 'power' for flat surfaces.

While many mini dumpers transform electric power into hydraulic energy to move the tracks, the HS701E features electrically powered tracks, which also support higher battery autonomy.

It can carry out work corresponding up to five hours or to 18 km on a standard battery pack of 120 Ah and

in 'power' mode'. Charging time is less than three hours (230V).

Meanwhile the HS1203 mini dumper, launched at the end of 2020, is the latest evolution of Hinowa's medium-sized mini dumper, complementing the HS1103 - a compact earthmoving vehicle with a maximum 1000 kg load capacity.

The HS1203 is described as a "compact and versatile, agile and robust tracked machine."

It features rubber tracks with a width of 230 mm. The tracks have three rollers per side plus the slide, tensioned by a grease cylinder system.

Spanning an impressive capacity range, these releases demonstrate a category evolving to meet ever greater efficiency and safety demands. **IRN**



On the spot turns

From Yanmar, launched in October 2020, the C50R-5A tracked carrier features compact dimensions. Its direct-injection engine delivers 111hp and 410Nm of torque, and low emissions. At 2.2m wide, and 4.54m long, it can turn 360° on the spot in seven seconds.

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Growth through challenging circumstances

When a man as experienced as Scott Park, President and CEO of Doosan Bobcat, who has been in the construction industry for decades, says that he has never experienced a set of circumstances close to what we have now, it confirms that we really are in uncharted waters.

The Covid-19 pandemic has been accompanied by a global materials shortage, supply chain issues, a lack of skilled labour and, let's not forget, one of the strongest years for equipment sales that the construction industry has ever seen.

"I'm more than 30 years into my career and I've never seen a year like this before. We have a lot of people that are working extremely hard to make sure that we have manufacturing taking place," says Park. The President and CEO was speaking to me via a video call from the Czech Republic where he was taking a look at one of the company's factories.

Park says that just meeting the normal production schedule takes lots of teamwork and flexibility. "There's a lot of very tired people in the organisation, but I always tell them, 'look at the bright side: would you rather have the other situation where we're trying to figure out where we're going to get the next order?'"

A mixed story

It is certainly true that there is no shortage of orders coming in. Park says that, for the last few years, sales have been a touch under US\$4 billion – this year they are projecting US\$4.5 billion. While this is strong growth, Park characterises it as a "good news and bad news story." He comments that, "The good news is that we're selling more product than we've ever sold before. The bad news is that if we could make more product, we would sell even more."

"That's coming from the disturbances in the supply chain.

Despite the pandemic, supply chain issues, and other challenges, construction equipment sales are booming. Doosan Bobcat has performed strongly and have ambitious plans for the future, as Scott Park, President and CEO, tells Andy Brown.



Doosan Bobcat has expanded its product range from three main products to more than ten.

The company is one of the leading players in the compact equipment market.



“ I’m more than 30 years into my career and I’ve never seen a year like this before. We have a lot of people that are working extremely hard to make sure that we have manufacturing taking place. ”

SCOTT PARK,
President and CEO,
Doosan Bobcat.

Scott Park,
President
and CEO
of Doosan
Bobcat.

We’re up somewhere in the neighbourhood of 20 to 30% year on year so far. It’s been an extremely strong year. Our top line projection for this year is going to be significantly higher than the highest year we’ve ever had in history.”

During our conversation Park comes across as engaging, open, and thoughtful, providing genuine answers to questions. He gives another nuanced take on the problems that the issues in the supply chain bring to all global companies, even joking that if we were to really get into the finer details then we’d be talking for hours.

He says that the worldwide computer chip shortage has impacted Doosan Bobcat – while they have fewer in their equipment than, say, the automotive industry, there are still around 140 chips per machine. This has led to issues, but one of the big problems is when they don’t know what components will be missing.

“Really, the key point is that we really don’t know where the product or component shortage is going to come from. One day it might be an engine. Next day it might be rubber tubing. The day after it might be a display or some telematics device. It’s really all the way across the board and it’s for different varying reasons.”

Even when factories have the raw materials available, they sometimes can’t produce what is needed due to a shortage of skilled labour. And, speaking about raw materials, the costs of some of these have been skyrocketing.

“We track quite a few commodities, but the one that’s most closely related to our product is steel, and prices have gone up multiple times, around three or four times in a given year. That’s been quite a challenge.”

Expanded product range

There’s no doubt that the last year – well, the last 18 months, really – has been, and continues to be, difficult for all types of businesses. While the circumstances were very different, Park is no stranger to having a lot of balls in the air, so to speak; several years ago he formulated a strategy that saw Doosan Bobcat launch more product categories in a few years than the company had in its history. >

"In 2018 through 2020, we really accelerated the strategy around playing a bit more offence than defence. Through that three-year period we introduced more products, product categories and product concepts than we did in the whole 60 year existence of the company, if you can imagine that," comments Park.

"It blows people's minds considering how long Bobcat has been around and how many products that it has. But, if you look at our portfolio today, it's not double, it's not triple, it's even more than that. We were focused on mini excavators, compact track loaders and skid steer loaders, those three main categories. Now we've got more than ten. It's a huge introduction of new products while at the same time upgrading and updating our current equipment."

As well as this bold change in the company's approach to its product line-up a new strategy regarding construction technology was also unveiled. Park says, "The construction equipment business, especially the compact construction equipment business, has been quite slow in innovation and technology. In smaller, less costly products you often don't see as much innovation because of the proportion of the cost to the product."

Seeking to help address this the company launched their new strategy, FACE, which stands for: Future, Automation, Connectivity and Electric. Future is a focus on how retail will change and evolve, such as increased digital offerings. Automation needs no explanation; it is a rapidly expanding area.

"Obviously, because of the fact that our products have so many different attachments in applications that we use them in, you're not going to see, in the near future, a fully automated loader, right? I mean, it's very difficult to have 400 attachments and have it all automated," says Park.

"However, you will see semi-autonomous or even specific function capable autonomous features coming onto our products quite soon. We already have prototypes on different kinds of functions and capabilities, which now a user can use within the product itself."

The E stands for electric, or more accurately, electric and alternative power, now that hydrogen seems to be emerging as a genuine option for the industry. Electric is the main focus, though, and the company will be showing an electric compact track loader at the CES show in Las Vegas, US.

Park says that, regarding electric power, "The technology is here. The capabilities are here and we continue to expand our portfolio." When asked what the biggest barrier to the more widespread adoption of electric equipment from its current (relatively) low level is, he has a succinct answer: cost.

"Clearly, we do see customers that are requesting it, but there is a price differential that you need to pay... so it is really about when can that price level be at the same level as the internal combustion products.

"If you look at the automotive industry, or at some other industries, true acceleration comes from regulation, whether it's regulation on the requirement for non-emissions engines or a regulation which means a subsidy into that product category that brings that picture together."

Future targets

With original equipment manufacturers reporting that their order books are already filling up fast for next year, it looks like the major headache for the



The company's E10e electric excavator – Park says that the higher cost of electric remains a barrier to wider adoption.

OEMs will be finding the parts and labour to fulfil the orders, rather than chasing sales. Park certainly sounds bullish about the future, saying, "This is just the beginning. You're going to see continued growth in this organisation; this year is going to be the biggest year ever when it comes to product sales.

"If you look at our history we have really stayed within that US\$2 to US\$3 billion range. But this year we will be in the mid fours and next year, with the inclusion of the forklift company that we purchased, we will actually be in excess of US\$6 billion."

This strong demand for sales is occurring at the same time that the industry is experiencing more change than it has in a long time: new technology such as automation and remote control, new power options like electric and hydrogen and increasing pressure to reduce carbon emissions and become more sustainable are all pressure points.

"It's a very exciting time," Park agrees. "At the same time, it's a very scary time. We are transforming and my objective is that we want to be ahead. I want Bobcat to be the company that will sell its technology to its competitors. The objective I've given to the innovation and R&D teams is that we want to be ahead of the game, and we want to move the market in in a certain direction.

"We invented the skid steer loader way back when; we invented this category. Why can't we

reinvent the compact construction equipment market yet again and be the leader in it moving forward? I think there's a tremendous amount of excitement and a tremendous amount of change, which means a tremendous amount of challenge ahead. But it's something that I feel we're well equipped to attack."

IRN

“ We invented the skid steer loader way back when; we invented this category. Why can't we reinvent the compact construction equipment market yet again and be the leader in it moving forward? ”

SCOTT PARK,
President and CEO,
Doosan Bobcat.

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Why ESG-linked loans are impacting construction finances

It doesn't take long for Geoff Doherty, chief financial officer at Kingspan to start talking about virtuous circles and environmental, social and governance targets.

Over the last decade, the Dublin-listed building materials manufacturer which specialises in high-performance insulation systems, has marketed itself heavily on its green credentials and the targets it sets itself to reduce energy consumption.

By setting itself ambitious environmental, social and governance (ESG) targets and then putting its efforts into achieving them, Kingspan boasts that it has saved the world the equivalent of 110 million barrels of oil over the last 25 years and radically altered its power use so that all of its operational energy comes from renewables.

And that's before you start to talk about the new ESG targets the company has set out to achieve over the next ten years which include reducing its manufacturing carbon emissions to as close to zero as technically possible and to make insulation panels using discarded plastic bottles fished out of the oceans.

"ESG targets tangibly make a difference," says Doherty. "Never before has there been a greater correlation between wider business performance and doing the right thing on climate change and socially."

Kingspan's green commitments

Over the years Kingspan's environmental commitments and actions have attracted investment from specialist ethical funds. In September 2020 Kingspan raised €750 million through the sale of 'green bonds,' and the company's shareholders include funds such as Baille Gifford and Norges Bank which aim to select stocks based on strong ESG principles.

In June, Kingspan went a step further, taking out

LUCY BARNARD is senior web editor and features writer for *International Rental News'* parent company KHL. She is a specialist reporter and features writer about the construction industry.

Environment, social and governance-linked loans are fast entering the mainstream. But which construction industry companies are linking their finances to 'green' targets and why? KHL journalist Lucy Barnard finds out.

“ There is a virtuous circle of meeting the needs of customers who need energy efficient solutions, the attraction and retention of high-performance talent and the ESG objectives of other stakeholders and capital providers. ”

GEOFF DOHERTY,
chief financial officer – Kingspan.

Wind turbine.
PHOTO COURTESY OF REUTERS

“...today, nearly every conversation we have with our clients across every sector – and with all types of lenders - involves a discussion about ESG.”

MARC FINER,
director for debt advisory at KPMG.

a €700 million five-year loan with a syndicate of ten international banks which is built around its ESG targets. Under the terms of the loan, the company is able to borrow money at a more advantageous rate if it meets the targets it has set itself than if it does not.

“There is a virtuous circle of meeting the needs of customers who need energy efficient solutions, the attraction and retention of high-performance talent and the ESG objectives of other stakeholders and capital providers,” Doherty says.

And Kingspan is not alone. Businesses around the world including Nokia, Shell and Philips, are increasingly linking their loans to targets aimed at tackling the climate crisis and promoting a fairer society.

Kiloutou’s green loan

ESG loans are becoming more common in the construction industry too. In July, French construction equipment rental giant Kiloutou arranged a €10 million banking facility, linked to its performance on sustainability goals including investment in low-emissions equipment and the representation of women in its management. In May, UK contractor Wilmott Dixon agreed a £50 million sustainability-linked loan facility coordinated by HSBC with an interest rate which varies depending on the firm hitting a series of targets based around the firm’s net-zero carbon commitments. French contractor Eiffage agreed a €2 billion five-year ESG-linked loan with a syndicate of twenty institutions in 2019. And a number of other contractors including Skanska are aiming to take out ESG-linked facilities when they next refinance.

In fact, data specialist Refinitiv, calculates that ESG-linked loans issued to the construction sector in the first half of 2021 stood at US\$8.1 billion, surpassing the US\$6.6 billion issued by banks to the sector in 2020 and close to the US\$8.5 billion issued to the sector throughout the whole of 2019. And the number of new ESG-linked loans issued by lenders to the sector increased to 25 in the first half of 2021, already surpassing the record 23 issued internationally in 2019.

“If you’d have asked me eighteen months ago, I would have said that our work in this area was occasional, focused among large, industrial corporates, and with ESG rarely being a key driver of the company’s refinancing strategy or the credit market’s appetite”, says Marc Finer, director for debt advisory at KPMG who specialises in plant hire financing and ESG-linked finance. “But today, nearly every conversation we have with our clients across every sector – and with all types of lenders – involves a discussion about ESG.”

Banks argue that businesses with clear ESG strategies are generally better run and less likely to default on their loans.

Sustainable construction business

“Our starting point has always been that sustainable business is better business,” says Leonie Schreve, global head of sustainable finance at ING, which has been writing ESG-linked loans since 2017. “We see that companies with a credible sustainability strategy and strong sustainability practices have a lower credit risk. And having lower credit risk in our portfolio means we can price it differently.”

Unlike “green loans” where borrowings must be used for environmental projects or investments, ESG-linked loans have no restrictions on usage. Instead, the cost of debt is usually linked to three or four specific and measurable goals, often taken from a company’s own sustainability strategy. For example, Kingspan’s ESG targets comprise 12 specific targets surrounding the firm’s commitment to recycling and reducing energy and carbon. Under the loan agreement, if the company manages to meet these targets, the bank agrees to reduce the interest rate on the loan slightly.

“Linking financial products to the sustainability achievements of our clients is just another way we’re helping them to accelerate their sustainability agenda and really step up and make the changes they need to reach a net-zero commitment,” Schreve adds.



Greta Thunberg’s climate activism is influencing investors. PHOTO COURTESY OF REUTERS

But that is only part of the story. Spurred on by Greta Thunberg and a new generation of activists keen to take more drastic action to tackle climate change, shareholders around the world are putting pressure on banks to do more to demonstrate their commitment to saving the environment and promoting social change.

Earlier this year HSBC committed to set targets to reduce its exposure to carbon-intensive assets after a group of investors filed a resolution calling for the bank to curtail its financing of fossil fuels. And last year Barclays published a climate resolution plan after around a quarter of its shareholders supported a resolution requiring it to stop providing financial services to firms not aligned with the Paris climate accord.

Business resilience

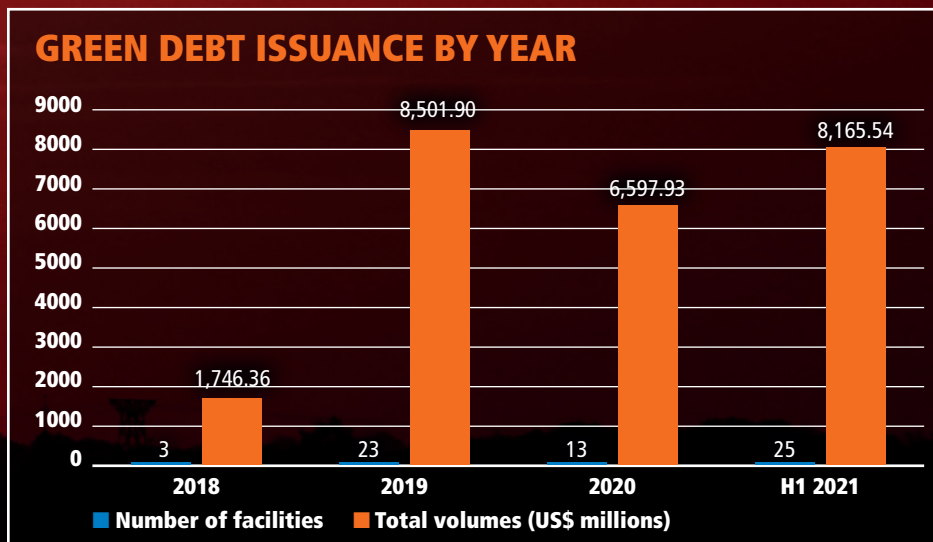
The result is that at the moment, banks are particularly keen to sign as many ESG-linked loans as possible, meaning that companies which can secure such lending can get better terms (although the actual interest rate discount on loans usually amounts to only around 5-10 basis points).

Pressure from customers, employees and shareholders to commit to fighting climate change is also encouraging directors to sign up for something which looks like it may well soon be incorporated into the financial mainstream.

“For me, this is a business resilience issue and an access to capital issue,” Finer says. “Companies are focusing on ESG not only because it’s morally the right thing to do, it’s because they know their business may not be resilient in the long term if they don’t. Lenders are starting to prefer and target those businesses which are able to make ESG commitments. Customers, in some cases, are already preferencing products from companies that they perceive to have a better record on environmental or social issues. Employees are choosing to work for these companies and holding their employers to account on their ESG commitments.”

2021 ESG-linked loans

But, without some way for banks and others to police whether or not targets have been met, critics complain that the concept runs the risk of being reduced to little more than a marketing exercise.



“ We see that companies with a credible sustainability strategy and strong sustainability practices have a lower credit risk. And having lower credit risk in our portfolio means we can price it differently. ”

LEONIE SCHREVE, global head of sustainable finance – ING.

According to data firm Reorg, nearly two thirds of ESG-linked loans written during the first quarter of 2021 do not require a third party to verify that ESG targets have been met. And, with companies able to choose their own targets, there is a risk that they will not choose particularly stretching ones.

ING's Schreve agrees a lack of third party verification, but argues that it is up to the companies themselves to make sure that they take on these loans in the right spirit.

“It's critical for sustainably-linked financing structures to be ambitious and address the most urgent challenges with maximum impact,” she adds. “Anything less won't contribute to the herculean task of building a sustainable economy. While 'greenwashing' is not a term we would use, there is a risk of falling standards, particularly as this type of financing becomes more mainstream.”

“The credibility of the market relies on clients themselves being committed to their sustainability goals and a net-zero future,” she adds. “There's always a risk that companies go for less-ambitious targets, which in turn affects the quality of the product and lessens its impact.”

Moreover, to combat the perception that borrowers were being allowed “to mark their own homework,” three industry associations representing bankers, law firms and underwriters in Europe, the US and Asia have revised their sustainability-linked loan principles earlier this year requiring borrowers to obtain independent external verification of their performance against the targets set.

In May a joint working group of the Loan Market Association, the Asia Pacific Loan Market Association and the Loan Syndications and Trading Association published an updated Sustainability Linked Loan Principles and accompanying guidance setting out voluntary market standards for what constitutes a sustainability-linked loan and how they should be assessed.

“The financial regulators are focussing on this area at present and looking carefully at how banks are monitoring claims to ESG credentials,” says Janine Alexander, a partner at law firm Collyer Bristow who specialises in financial market disputes. “Forthcoming changes in regulation and accountability are likely to mean that in future banks will demand more proof from borrowers that they have met the criteria set out and will be more prepared to act if they do not.”

“Borrowers should take legal advice before they sign up to any of these ESG-linked loans and think carefully about how they record progress against the targets/criteria set and be mindful of the reputational risk if it emerges they haven't met or can't prove they have met some of the targets they set themselves,” she adds.

Demand for greater levels of scrutiny on ESG-linked loans

Demand for scrutiny for ESG-linked loans could spell more business for firms of external auditors which must already sign off on company accounts and loans. It is also prompting banks to take on expertise from the hundreds of ESG research agencies such as Sustainalytics and EcoVadis which help investors and consumers

measure and benchmark a company's ESG performance.

And, as well as holding borrowers to account over their targets, banks, and the ESG ratings agencies they use, are also starting to demand more stretching targets in the first place.

“The quality of debate we're seeing lenders have with clients about their ESG commitments now is in a completely different zone to where it was eighteen months ago,” says Finer at KPMG. “Before, the bar was arguably lower in terms of what some lenders were prepared to accept. Now these do actually have to be commitments that are demonstrably really core and stretching.”

“If a plant hire company promises to remove all the plastic cups from the staff cafeteria. It's not going to cut it,” he adds. “It would have to be something about the operations of that business like a commitment to transition their fleet to alternative fuel technology

Kingspan's ESG Targets:

ENERGY:

- Maintain net zero energy status
- Increase direct use of renewable energy to 60% by 2030
- Increase onsite generation of renewable energy to 20% by 2030
- Install solar PV systems on all owned facilities by 2030

CARBON:

- Net zero carbon manufacturing by 2030
- 50% reduction in product CO2 intensity from primary supply partners by 2030
- Zero emission company cars by 2025

CIRCULARITY:

- 1 billion PET bottles upcycled into manufacturing processes by 2025
- All Quadcore insulation to utilise upcycled PET by 2025
- Zero company waste to landfill by 2030

WATER:

- 5 active ocean clean-up projects by 2025
- 100 million litres of rainwater harvested by 2030

or to cut carbon emissions by a meaningful percentage. It has to be measurable. And it has to be benchmarkable. A bank will be looking at this plant hire company relative to five others and asking whether their commitment to cutting emissions is enough.”

Grenfell Tower

Yet critics still argue that the practice of linking such loans to just a few narrow ESG targets could well mean that wider issues are ignored.

Interestingly Kingspan signed its ESG-linked €700 million five-year loan with a syndicate of ten international banks in June 2021, several months after some of its biggest ethical funds shareholders were exiting their holdings in the company citing concerns over its governance.

Investors Janus Henderson, WHEB Asset Management, Pictet Asset Management and Guinness Funds said they had sold their stock in Kingspan over concerns about the culture of the business which emerged following evidence company officials gave to the Grenfell Inquiry in November 2020. Fellow investors Baillie Gifford and Liontrust Asset Management also reduced their stake in the company.

Although the ongoing inquiry heard that Kingspan only supplied around 5% of the cladding used in the London tower which burnt down in 2017 and had no role in its design, Kingspan executives admitted that the company had sold Kooltherm K15 insulation without telling customers that it had failed fire tests.

“We have concluded that we are unable to continue to invest in Kingspan,” Seb Beloe, head

“ If a company has a poor or controversial track record on environmental or compliance issues, I think it’s right that the banks should probe that history when lending them money. ”

MARC FINER,
director for debt advisory, KPMG.

of research at WHEB Asset Management wrote in a note to investors. “We believe, that the culture within the UK business enabled – even encouraged – an attitude that prioritised commercial advantage over product safety. Furthermore, based on the evidence presented at the Inquiry and our knowledge of the business, this culture was at least tacitly endorsed by group management.

In a statement Kingspan said that it had “identified and apologised for process and conduct shortcomings” in its UK insulation business and that it had implemented measures to “ensure that there could be no recurrence and to reinforce our fire safety focus.”

Moreover, with demand for ESG-linked loans set

to increase, more and more companies in industries often shunned by socially conscientious investors are hoping to take advantage of the financing opportunity.

In December oil giant Shell agreed a \$10 billion US revolving credit facility co-ordinated jointly by Bank of America and Barclays linked to the company’s progress in reaching its short term net carbon footprint intensity target. In March 2021 US gold miner Newmont Corporation signed a US\$3bn loan facility including a feature which will adjust the interest rate depending on the group’s sustainability performance. And in August 2021, it emerged that tobacco giant Philip Morris International published its own set of ESG targets in the hope of attracting green finance.

Company environmental records

“If a company has a poor or controversial track record on environmental or compliance issues, I think it’s right that the banks should probe that history when lending them money,” says Finer. “There is that question which says do you cut them off or hold them to account that they have learnt from what they’ve done in the past and they are transitioning to something new and better?”

“Every business can be looked at through a whole range of different lenses. I think you have to be a realist and see that business is a diverse place. The world is not a perfect place however, there is a collective surge of willingness from business and in society to change like there never has been so this is an opportunity to get your stakeholders together and get everyone to back that change.” **IRN**

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Cybersecurity

What did we learn from the IRN Webinar 'Cybersecurity for Rental' on 4 November? IRN Editor Belinda Smart, who moderated the discussion, reports.

Due in part to increasingly digitalised workplaces necessitated by the pandemic, cybercrime is accelerating; in May, US cloud-based information security company Zscaler calculated a rise of 69% in 2020; over a quarter of this attributed to ransomware.

Webinar panellist Gareth Lloyd, Chief Digital & Information Officer at Loxam, summed up the challenge. "Every business out there is subject to attempted cyber-attacks every day," he said. "Almost all the time they get intercepted by one of the layers of security that we've all got in place."

First-hand experience

Palfinger's Alexander Wörndl-Aichriedler, VP Corporate Global Information and Communications Technology at Palfinger AG, confirmed that in



January, a ransomware attack froze operations at Palfinger sites in Europe, North America, South America and Asia for around 12 days, which necessitated the shutdown of Palfinger's production and administration processes.

Meanwhile in 2017, the purchase ledger team at Loxam Powered Access had experienced a potentially devastating phishing attack, Lloyd confirmed. Although the company didn't lose money or data, the incident elevated cybersecurity to a "board-level topic" for the first time.

Prevention tools

Following the January attack, Palfinger established a security operations centre (SOC) and implemented EDR (end point detection response) technology as well as DNS (Domain Name System) security, said Wörndl-Aichriedler. At the time of the webinar, it was also reviewing its privileged accounts - which can give cyber-attackers access to servers, databases and high value systems.

Alongside these measures, "a key challenge for is recruiting staff with cybersecurity skills," said Wörndl-Aichriedler "You need six to eight months, sometimes 12 months, to find network technicians skilled in cybersecurity."

On whether businesses should keep cybersecurity

in-house or engage third party consultancies, the panel agreed that outsourcing some cybersecurity functions was

often the best route; "We don't have the scale to do everything in house," said Loxam's Lloyd, "It's a hybrid approach."

Panellists also discussed whether cloud-based or on-premise cybersecurity solutions were more effective.

"A lot of cloud providers give you the platform baked in with some security, but it's still ultimately your responsibility and it's important that you treat it as your own network," said Guy Dulberger, VP Information Security at Ritchie Bros.

"If you're with a major cloud provider, Google, AWS [Amazon Web Services], or Azure, it's all about how you set it up and configure it, but overall, they have much better levels of expertise than we have around security," said Lloyd. "In a lot of sectors this is a debate that's already been had, and the conclusion is that on premise is dying, or will die."

Ransomware is a dominant cyberthreat, with various tools deployable as protection. One of the most important was influencing human behaviour, as ransomware typically enters an organisation via email.

"Investing in security and awareness training of staff are some typical approaches. Put simply, don't click on something suspicious," Dulberger said.

Also critical was a good back-up and disaster recovery strategy. "We also do tabletop exercises where we simulate a ransomware attack. We ask the question: 'If this happened today, how would we handle that?'," he added.

Loxam runs regular training programs including simulated phishing, while Palfinger staff go through similar exercises on a frequent basis and are also

Panellists



From left to right:

■ **Alexander Wörndl-Aichriedler**, VP ICT Palfinger AG

■ **Gareth Lloyd**, Chief Digital & Information Officer, Loxam Powered Access

■ **Guy Dulberger**, Vice President, Information Security, Ritchie Bros.

Moderator: **Belinda Smart**, Editor, *International Rental News*

“ You need six to eight months, sometimes 12 months, to find network technicians skilled in cybersecurity. ”

ALEXANDER WÖRNDL-AICHRIEDLER, VP ICT Palfinger AG.

for rental

regularly updated on common threats.

"Be prepared," said Lloyd. "Do you have a 24- and 72-hour incident response plan in place? Do you know what you're going to do? Do you know who you're going to contact? Quite often it could be a question of identifying things as soon as you can. It could be an unusual pattern of tickets through your service desk, for example."

Attack response

In the case of an actual attack, Palfinger's Wörndl-Aichriedler said that in some cases, paying the ransom "if it's in a reasonable range" was a regrettable but necessary solution. "In the time difference between your last backup and the time when the ransomware hits, the data is usually lost."

While the laws in some countries officially steered businesses away from paying ransoms, "it's quite common that people do pay," Lloyd agreed. "Cybercrime is a fantastic business model [for criminals]. It's really cheap to pick up tools, to execute attacks, and there's a very low risk of getting caught," he said. "So sometimes, the economically rational thing to do is to make the payment."

Telematics threat

In terms of threats specific to construction equipment rental, IoT and machine telematics systems are a growing cyberattack "threat vector" for rental companies, Lloyd warned. IoT attacks were still relatively uncommon, "but should be on the radar of every rental company executive team."

"Once you connect a machine to the internet, you are exposing it to the risks around cybersecurity."

"IoT is an area where there is a huge imbalance between the sophistication of the security protection in the machine and the sophistication of the cyber criminals."

"I'm guessing that in 99% of devices it is impossible to patch the software or firmware on the machines. You literally have to replace the device."

Lloyd said machines were at risk of being hacked as a way of gaining access to a wider network; to change safety settings on a machine; or to disable machines as part of a ransomware attack.

Attack via customer base

Another potential threat for rental companies is attack via their customer bases, said Lloyd.

"People in rental might think, 'We're low profile, why would we be a target?' But if cyber criminals are targeting a particular entity - it could well be one of our larger customers, someone who's in critical national infrastructure, someone who's in utilities or telco; it could be Ukrainian power plants or Iranian nuclear facilities - we could be an easy route into those organisations."

"Being the Trojan horse that lets a cyber-criminal inside one of our customers' organisations, that's a huge reputational threat."

Lloyd said it was "the norm" for Loxam customers and suppliers to do detailed cybersecurity checks. "When we're pitching for work, the tender documents are 30 out of 100 pages on cybersecurity."

Ritchie Bros. which has a large global customer base, takes a layered approach, said Dulberger. "We do encryption on sensitive data, and we do access control, so people only have access to data on a 'need to' basis. We've done a lot of work to address privacy and respect our customers' privacy."

Insurance

Panelists also discussed the pros and cons of insurance. The rise of cyber-attacks had led to rising insurance premiums with onerous requirements for the insured, Wörndl-Aichriedler said. "As with every insurance contract, you should read small print."

"Insurance is a business continuity and corporate risk question. I absolutely think it's the way to go," said Lloyd. Insurance companies also provide access to specialist providers should an incident arise, "so it can be a good way to get early support."

ERA working group

A member of The European Rental Association's (ERA) Cybersecurity Working Group, Lloyd pointed

ERA drives new cybersecurity initiatives

The European Rental Association's (ERA) Cybersecurity Working Group was set up at the end of 2020 and has produced the Cybersecurity Best Practice Guide for the equipment rental industry, which takes an enterprise-wide view of cybersecurity and outlines the leading practices relevant to the rental sector. The guide can be found in the Publications section at www.erarental.org.

“ Awareness is free, so figure out a creative way to engage with your user base to ensure they're safe and they know what to do and what not to do. ”

GUY DULBERGER, Vice President, Information Security, Ritchie Bros.

to the Cybersecurity Best Practice Guide and ERA reference materials, including a 48-hour response template.

He said the work had led to the conclusion that aiming for an "external benchmark" was helpful for companies. "In the UK, companies can get going with looking at the Cyber Essentials program, which gives you a basic action plan, and can then move up to Cyber Essentials Plus. It's a good way to look at what best practice is broadly; a good place to start."

A business priority

Overall, cybersecurity should be regarded as a business priority for rental companies, the panel agreed.

"Security doesn't have to be expensive," said Dulberger. "You can do a lot without spending a lot of money. The first step is to identify the threats to your company. If you have a public facing website, secure that. If you're a sales organisation and you do a lot of email, invest in email security."

"Awareness is free, so figure out a creative way to engage with your user base to ensure they're safe and they know what to do and what not to do."

Lloyd said demonstrating return on investment was often a barrier for businesses. "It's a harder sell to say you're spending money to avoid a potential problem," he said. "But I think we need to think creatively about how to make those business cases."

"Construction and rental are at the lagging end of digital transformation. But we are rapidly increasing our level of exposure and we need to make sure the investment in cybersecurity is there, rather than waiting for something bad to happen, and then realising we need to do something about it."

"In terms of where this should sit, cyber security is one of the top business continuity risks for any modern company."

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“ Being the Trojan horse that lets a cyber-criminal inside one of our customers' organisations, that's a huge reputational threat. ”

GARETH LLOYD, Chief Digital & Information Officer, Loxam.



Zeppelin Rental is working on a project to integrate its fleet offering into its rental customers' e-procurement platforms.

Belinda Smart spoke to Lars Schmitt, Zeppelin's Digital Product Owner for e-procurement, and Benjamin Hoeck, Director – Digital Business and Partnering.



E-procurement evolution

Sparked in part by investment in e-commerce driven by the pandemic, the digital transformation in construction and equipment rental is being widely observed.

Within that, an important area for construction companies and other rental customers is e-procurement - the online purchase of products, equipment and services. For rental, where transactions concern both physical products and services, e-procurement presents challenges: for example, how do you factor intangibles such as maintenance or service into an online purchase?

German-based Zeppelin Rental is currently grappling with such questions. In fact, in early 2021, it created a new role specifically for that purpose. Lars Schmitt was appointed in April as Digital Product

Owner for e-procurement. He brings relevant B2B e-commerce experience across a number of sectors to the role and is also looking at e-procurement and related topics via a PhD at the Technical University of Munich.

Benjamin Hoeck, Zeppelin's Director Digital Business and Partnering, tells *IRN* that while the company has been harnessing feedback from its customers to develop solutions for many years,

Schmitt's recent appointment is significant.

"You need a dedicated person who can drive these projects; someone who can be a single point of contact when customers request new digital features. Lars brings fresh perspective, having worked with other industries, and he also has the ability to bring diverse stakeholders and ideas together," he says.

Schmitt tells *IRN* the project and related research "has looked first at how digitally enabled Zeppelin's large customers are when it comes to procurement, and secondly, what areas does Zeppelin need to develop to be prepared for widespread uptake of e-procurement."

The project, which is being undertaken by Schmitt and his colleague, Antje Baumann, encompasses larger rental customers in Zeppelin's home market, Germany. (The company also operates in Austria, Czech Republic, Denmark, Slovakia and Sweden).

"We've conducted a large number of interviews with customers," Schmitt says. "Typically, we're focusing on large customers because they are proactively investing in these e-procurement systems."

e-procurement drive

Zeppelin sees clear benefits in e-procurement; broadly speaking they encompass efficiency, transparency, and cost reduction on the transactional side. Deeper integration of data, processes aligned with customer

“ For larger organisations, e-procurement reduces incidences of 'maverick buying', in other words the purchase of items outside the company's procurement channel. ”

BENJAMIN HOECK, Director - Digital Business and Partnering, Zeppelin Rental.





systems and improvement of the user experience are benefits for the customer, Hoeck tells *IRN*.

"For larger organisations, e-procurement reduces incidences of 'maverick buying', in other words the purchase of items outside the company's procurement channel," he says. And for companies with several different subsidiaries – each with a different procurement approach – it helps streamline procurement via a single channel.

It also helps procurement agents to compare different supplier offerings, while other benefits include more efficient communication between buyers and suppliers.

Ultimately the aim is to enable customers using Zeppelin e-procurement "to integrate Zeppelin Rental assets directly into their fleet management system, where they can see the Zeppelin Rental fleet and integrate it into their scheduling," says Schmitt.

"Direct connection of the Zeppelin rental fleet to the customer's procurement system provides an overview of the entire Zeppelin Rental offering. This is then value-added through the introduction of relevant information such as accessories, parts lists or supplementary products."

The e-procurement interface enables customer orders and their site-specific details to be imported into Zeppelin's contract management system

and then integrated into upcoming contracts and machine reservation or allocation. These details might include site address, project name, required machines, equipment, attachments and services, rental period and contact person on site.

Connected customers using the interface have a full view of Zeppelin Rental's fleet, he says, including specifications. They can select a desired machine via a catalogue interface and request it directly from the system.

Three options

Zeppelin offers three e-procurement options, Schmitt confirms, starting with a static customer-specific catalogue file that contains product information and customer-specific price information. "We make this file available to our customers for import into their procurement system - either independently or with the support of their system provider."

The second option is a dynamic catalogue. Also known as a 'punch-out' catalogue, it typically 'pops up' as an icon in the customer's e-procurement interface at the click of a mouse, leading the customer to the relevant supplier's e-store.

"An advantage of this is that the customer needs to be logged in, so when the punch-out happens, customer specific pricing is running in the background. So, for example when 'excavator' and the rental period are entered, the customer specific pricing is already factored in."

The third is a Request for Quotation (RFQ) function, which enables a procurement agent to digitally request a quote from a supplier.

"The supplier creates a quotation and makes it available digitally to the agent, either by e-mail or directly via the supplier portal of the relevant procurement system."

Schmitt points out that customers without an e-procurement system can of course still use Zeppelin's online store or communicate via phone, email or in person at a branch.

Rental-specific approach

Zeppelin is engaging with both e-procurement suppliers and rental customers to ensure e-procurement processes are optimised.

This focus on optimisation is important, says Hoeck; "If somebody is looking for a machine, say for example their own fleet has no capacity, they're going to turn to rental as an alternative. It's important that their purchasing enquiry is efficient. They only get this opportunity in terms of increasing efficiency if the e-procurement on the construction company side is optimised."

“ More and more companies are going to be using e-procurement systems. We believe that as a rental supplier or service provider in the construction industry, we have to get ready. ”

LARS SCHMITT, Digital Product Owner for e-procurement, Zeppelin Rental.

As well as capturing information from rental customers, engaging with technology suppliers has also proven critical. Many of Germany's larger construction companies and infrastructure operators already work with e-procurement solutions from software providers and e-procurement platforms such as SAP Ariba, Onventis, Newtron or OpusCapita.

"Firstly, there are different standards used by e-procurement system providers," says Schmitt. "For example, SAP Ariba uses the cXML standard, while many others use OCI standard (open catalogue interface), so we need to be prepared for these different standards."

There are other challenges in the rental context. "These platforms have mainly been used in the construction industry to purchase physical goods such as construction materials, spare parts, safety clothing or office supplies.

"Existing e-procurement system providers have to date demonstrated a low awareness of the special rental characteristics entailed in e-procurement; and a key observation we've made in terms of rental in the digital context, is that rental businesses behave differently to the classic purchase of physical product," says Schmitt.

"If we're buying shoes in an online shop, we add them to the shopping cart and we see the price. However, in the rental context, if you add rental equipment to a shopping cart, the pricing or invoice amount will vary, because the rental period might change over time, or the equipment might come back earlier than expected."



One of several e-procurement variants- the so-called PunchOut process in which the customer "jumps" from the e-procurement system to Zeppelin Rental's online-shop (1) – and back again with the filled shipping cart (2).

"It also needs to be cleaned and the tank needs to be filled, for example, so additional services need to be calculated. The result is that the initial shopping cart is only an estimate."

The changing availability of rental products presents another challenge. "Most e-procurement systems are made for products that are 'in stock' but in rental the exact product you've selected might not be free at a dedicated rental store in the desired timeslot."

In short, current e-procurement standards are not 100% aligned for the rental application. "For example, most e-procurement platforms don't have an entry field for an input about the rental period; they only account for quantities, and don't allow for a period start and end date to be entered. Another field that's currently missing is for the specific employee who is going to use the item of machinery on the site; that is an important field for rental."

Next steps

Looking ahead, Zeppelin plans to form an industry cluster or roundtable to bring relevant stakeholders into the discussion around topics



such as standardisation. Along with customers and e-procurement providers, other rental companies will be invited to engage.

"Our view is that we are not operating alone," says Schmitt. "We believe other rental companies need to join the discussion to come up with some standards for rental companies engaging with e-procurement, as well as addressing other related issues."

Meanwhile a white paper on the findings from Zeppelin's customer interviews, and including technical guidance on e-procurement, is also

planned for publication in the first half of 2022.

Zeppelin's approach is to help drive digital transformation for rental and construction support services, primarily through information sharing and partnering, says Benjamin Hoeck.

"We are convinced that e-procurement will not only increase efficiency and transparency for our customers, but also further enhance the quality of our partnerships," he says. "Together, the aim is to optimise data exchange and make our collaboration even easier, better and faster."

Lars Schmitt adds; "We are essentially trying to understand the behaviour of our customers when it comes to digital procurement in order to improve the experience and functionality.

"The project is at an early phase, but we have a feeling that something is starting here. More and more companies are going to be using e-procurement systems. We believe that as a rental supplier or service provider in the construction industry, we have to get ready."

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“ We are convinced that e-procurement will not only increase efficiency and transparency for our customers, but also further enhance the quality of our partnerships. ”

BENJAMIN HOECK, Zeppelin Rental.

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ERA 2021 Market Report

The ERA's Market Report outlines a difficult 2020 for European rental markets amid the pandemic, but a return to growth in 2021.

The European Rental Association (ERA) has released its 2021 Market Report. Developed with the support of the ERA Statistics Committee, the ERA Market Report has been the reference source of intelligence for the European equipment rental market since 2008.

This edition, comprising market trends and international comparisons, uses a common methodology and definition to analyse 15 European markets, plus the Baltic states, with detailed market size results for 2018–19 (actual),



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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



The ERA Market Report: the only Europe-wide rental industry benchmark.

and with almost no site shutdowns, performed better than southern Europe and the UK, which faced severe lockdowns and disruptions to activity. With Brexit having now taken effect, the UK finds itself in a difficult position as the sourcing of materials now incurs increased costs, and the labour shortage, present across Europe, is further exacerbated.

Solid growth forecast

The reopening of most European economies after the first quarter of 2021 proved beneficial for rental activity as construction was able to pick up and other sectors of the economy also reopened. The performance throughout the rest of the year improved in most markets and now points to a solid growth forecast for 2021, mainly in Southern Europe and the UK, which were the worst-hit regions, while growth in Nordic countries and Eastern Europe remains more constrained.

It is important to stress the extreme conditions of 2020 and 2021, which have been analysed with our forecasts. Large peaks are expected this year, and further significant growth is expected in the short term.

The report is being published later this year due to a delay from Eurostat in delivering its 2019 data. Unfortunately, the data will still not be available before the end of this year, so ERA and IHS Markit took the decision to publish the report based on the available data. When receiving the data for the year 2019, and if this is justified, an update of the report will be established and released as soon as possible.

Key data and indicators

The ERA Market Report is the leading source of market intelligence on the European equipment rental market and the only Europe-wide industry benchmark. It contains detailed market information for the years 2018 to 2023 and key indicators, including rental turnover, fleet value and investments. This year includes a more accurate estimate of the UK rental market, with an improved methodology for evaluating cross-hire, as well as detailed data on the US rental market.

The report is available digitally for ERA members (EUR 500) and for non-members (EUR 1,200). To order a copy, please contact the European Rental Association at era@erarental.org. **IRN**

2020–21 (estimates) and 2022–23 (forecasts). These countries account for more than 95% of the equipment rental industry in the EU, the European Free Trade Association (EFTA) and the United Kingdom.

In 2020, equipment rental companies and other companies providing rental services generated a total rental turnover of more than EUR 25.2 billion in these countries.

5.5% increase in 2022

At a constant exchange rate, the equipment rental industry in the 15 countries analysed and the Baltic region declined by 7.2% in 2020. In 2021, there is an estimated growth of 6.3%, with 2022 forecast to increase by 5.6%, also at a constant exchange rate.

The overarching theme from this year's report is that 2020 was a difficult year for all the markets covered, even for those that managed to remain positive amidst the pandemic. Consequently, some markets fell considerably (France, Italy, Spain, UK), while others also lost ground but fared better overall (Switzerland, Sweden, Germany). This trend continued into the first quarter of 2021 before seeing returns closer to pre-pandemic levels of activity later in the year.

The COVID-19 pandemic took Europe by surprise last year and continues to plague the recovery in some markets, both directly and indirectly. The immediate impact differed from country to country. The Nordic countries, which did not lock down

“ The overarching theme from this year's report is that 2020 was a difficult year for all the markets covered, even for those that managed to remain positive amidst the pandemic. ”

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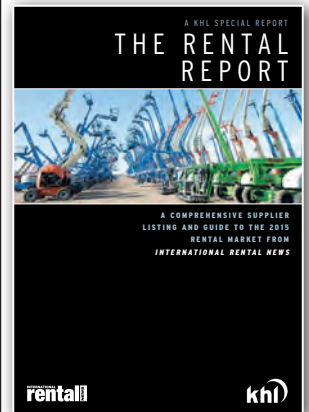
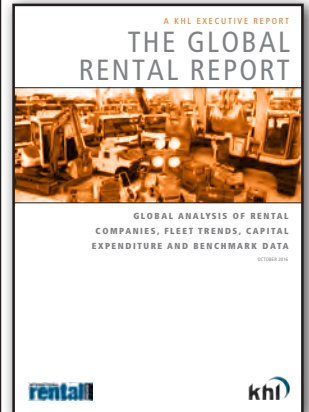
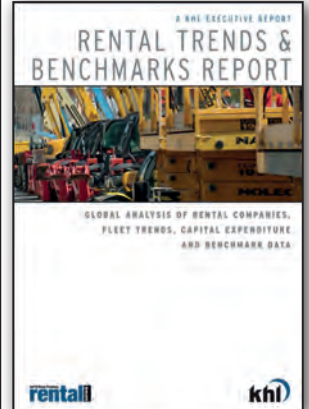
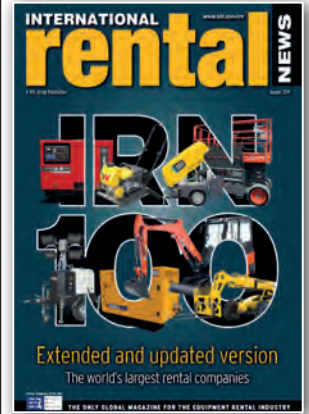


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