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NEWS

JANUARY-FEBRUARY 2022

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comment

Upbeat outlook

This first edition of *IRN* for 2022 comes amid upbeat predictions for the year ahead; I'm writing this comment following the UK's Executive Hire Show (EHS), where the message from the stands was loud and clear – an overwhelmingly positive outlook for the UK equipment rental market.

Exhibitors at EHS, which took place on 9 and 10 February in Coventry, told *IRN* demand in the UK market is rebounding; and our UK Report (page 26) also reflects this. In both instances, firms spoken to by *IRN* confirmed that, despite the pandemic-led uncertainty of 2020, UK rental demand is solid, supported by major projects and a focus on low emissions equipment.

That latter topic – the growing pressure for firms to invest in green products and processes – gains detailed coverage in our sustainability feature on page 20.

Often working hand in hand with sustainability is digital innovation, and our rental management feature on page 40 shows how one company is driving both. Meanwhile US company SitePro is also using digital technology to affect positive change within the company itself and the wider rental sector - see our interview on page 16.

On the subject of positive change, the Q4 2021 ERA/*IRN* RentalTracker survey – undertaken at the end of 2021 - shows that levels of rental business confidence in Europe remain high and have held firm since the previous survey in June 2021.

At this time of year, any mention of the European market - particularly in a climate in which confidence appears to be rebounding - leads neatly to a reminder about the European Rental Awards, which will take place on the evening of 15 June 2022, during the European Rental Association (ERA) Convention in Riga, Latvia on 15 and 16 June 2022.

The deadline for entries for the Awards is Friday 25 February 2022 (see page 25).

The award program is a unique forum for recognising achievement and sharing knowledge, and I encourage rental companies operating in Europe, as well as suppliers selling in Europe, to enter!

Enjoy the issue!

Belinda Smart, Editor

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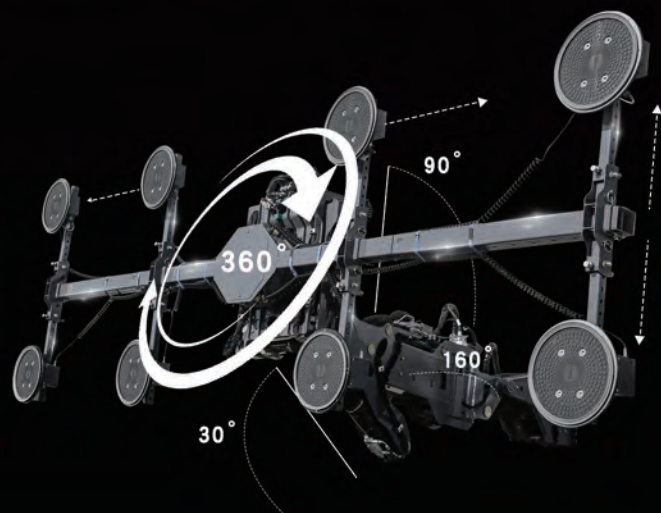


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Printed by: Buxton Press



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..outside

Sunbelt Rentals UK
– See full story
on page 28.



MEMBERS OF



Graysmark to lead Luigong



LiuGong has appointed **Phil Graysmark** as global business development director for its access equipment division. He will be responsible for launching the access division of LiuGong in Europe and will support the company's global growth strategies.

With more than 15 years of experience in the access industry, Graysmark moves over from his most recent role as European sales director for LGMG Europe. Previous to that he held senior positions at JCB and Genie.

LiuGong has 20 manufacturing facilities, over 14,000 employees, five global research and development bases and 17 regional parts centres. It is expanding its global presence by introducing its range of access equipment to Europe and North America.

Howard Dale, chairman of LiuGong Europe, commented; "Phil is widely known and brings a wealth of knowledge and product expertise to the team. We aim to become a leading provider of access equipment and Phil will help LiuGong achieve this goal."



First European delivery for new XCMG access subsidiary

XCMG has delivered its first batch of MEWPs in 2022, following its announcement in January that it would be expanding its aerial lift business into Europe.

The manufacturer's newly-established subsidiary in Germany includes training, parts and service, all of which is designed to strengthen its offering to European

rental companies.

The delivery of two containers of scissor lifts includes the XG0607DC and XG0807DC models, with working heights of 6m and 8m respectively, and lift capacities of 240kg and 230kg.

Ongoing developments in Europe will lead to further deliveries, including boom

XCMG has established a new subsidiary in Germany.

PHOTO: XCMG

DIARY DATES

IAPA / IPAF SUMMIT

10 March, 2022
London, UK

ERA CONVENTION

15-16 June, 2022
Riga, Latvia

CONSTRUCTION TECHNOLOGY SUMMIT

21 April 2022
Online

For more information on upcoming events, please visit www.khl.com/events

United Rentals to maintain high CapEx in 2022

Total revenues for 2021 were \$9.7 billion, which represents a 14.1% increase over 2020.

PHOTO: UNITED RENTALS



United Rentals has said it is likely to maintain the high levels of capital expenditure in 2022 with expected spending of up to US\$3.1 billion.

The forecast came as United reported a 24.7% increase in revenues for the final quarter of 2021, up to \$2.3 billion, with net profits rising 62% to \$481 million.

Total revenues for 2021 were \$9.7 billion, which represents a 14.1% increase over 2020, and means that United has now exceeded its record year in 2019 when sales were \$9.3 billion.

A notable feature of the results is the

continuing rise in revenues at its specialty rental division, where sales were up 45.3% in the quarter to \$613 million.

Matthew Flannery, CEO of United, said; "Our strong fourth quarter, which included record revenue, adjusted EBITDA and operating earnings, completes a year of significant achievements and provides solid momentum as we enter the new year" adding that the company's 2022 guidance – for revenues between \$10.6 and 11.0 billion – reflects "our confidence in leveraging our competitive advantages over the longer term."

IN BRIEF

■ Twelve acquisitions in 2021 helped **Herc Rentals** post record US\$578 million revenues in the final three months of the year, with operating profits doubling to \$71.8 million. The company expects to more than double its net capital expenditure on fleet this year to between \$820m and \$1120m.

■ **Elliott Group** and sister UK companies **Carter Accommodation** and **Procomm**

Site Services are to rebrand as **Algeco**. Elliott is part of the global Modulaire portable accommodation business. The move will create a single brand across the UK and Europe.

■ **Nationwide Platforms**, the UK's largest powered access rental company, has invested in more than 1,000 new machines, increasing its 13,500 machine fleet by over 8%.

Germany-based equipment manufacturer **Weber MT** has launched five electric and battery powered compaction machines.

They include three vibratory plates, a battery-powered rammer and a paver roller. **Weber MT**, said, "These new models keep with the spirit of the times in terms of environmental and climate



Hitachi sells controlling share of equipment business

PHOTO: GAP

GAP invests £18m in new pumps division

UK company GAP Hire Solutions has opened a Pump Services speciality division with an £18 million investment in Stage V pumps and related equipment. It is the company's eleventh speciality rental division.

GAP Pump Services will ultimately have 15 locations across the UK.

The firm's investment in the division includes a fleet of Stage V pumps from suppliers including Atlas Copco, DXB pumps and Active Engineering.

GAP has appointed Richard Broughton as Head of Pump Services, heading up a new team of pump specialists.

PHOTO: EEKELS POMPEN WEBSITE



Boels acquires pump specialist

Boels Rental has acquired Eekels Pompen, a rental business in the Netherlands specialising in pumps and related products and services.

The move will see Eekels Pompen added to Boels' speciality rental business.

Eekels Pompen's range includes chemical transfer pumps, ATEX pumps, submersible pumps, dry self-priming electric or diesel pumps, high pressure pumps and dewatering pumps.

It also offers pipes, hoses, accessories and generators. Terms of the transaction have not been disclosed.

Hitachi Construction Machinery is under new controlling ownership following Hitachi's sale of 26% of its holding - valued at \$1.6 billion - to Japanese trading company Itochu and private equity firm Japan International Partners.

Hitachi's stake is now 25.4%, with Itochu and JIP jointly owning a 26% controlling share.

The key motivation for the deal is Hitachi CM's business in North America, where last year the joint venture with John Deere was ended and where the construction equipment business is undergoing a major reorganisation.

JIP is a private equity firm experienced in finance and business restructuring, while trading company Itochu is already embedded in North America's construction sector through its ownership of compact equipment specialist Multiquip. Itochu has also worked with Hitachi CM in the

Hitachi Construction Machinery is under new controlling ownership.
PHOTO: HITACHI



past, co-owning its business in Indonesia.

Hitachi Construction Machinery is the world's seventh largest construction equipment manufacturer, based on annual revenues.

EHS exhibitors upbeat on UK market sentiment for 2022

The outlook for the UK rental market is optimistic, according to exhibitors at the UK's Executive Hire Show (EHS) from 9 to 10 February 2022, at Coventry Building Society Arena (CBS Arena).

They told *IRN* demand was driven by requirements for low carbon emissions equipment, and by housing and major infrastructure projects such as the HS2 high speed rail initiative.

Andy Munford, Managing Director of Shindaiwa UK, told *IRN* the UK market was "very strong."

Paul Williams, General Manager - National Accounts at JCB, described the atmosphere at the show as upbeat. "There's been a significant bounce back in business since the first lockdown in the UK, when we had to close factories."



PHOTO: IRN

JCB's stand at the Executive Hire Show in Coventry.



Deadline 25 February

The European Rental Awards ceremony is scheduled for the evening of 15 during the ERA Convention 2022, to be held on 15 and 16 June in Riga, Latvia. The deadline for entries to the awards is 25 February 2022; for more information see p25.

Registrations for the ERA Convention, to be held at the Radisson Blu Latvija Conference & Spa Hotel in Riga (Latvia), are now also open.

The theme of this year's Convention is 'Rental in Transition,' which will address the EU Green Deal, energies of the future and the place and role of the equipment rental industry in this transition.

For more detail, turn to page 25.

protection as they produce no direct CO₂ emissions."

Based on their respective diesel counterparts and said to offer the same power and performance, the environmentally friendly machines feature a Honda GXE electric motor and batteries with a modular design, meaning they can be used in different machines.

■ Spain's **GAM** has acquired a 51% stake in Grupo Dynamo Hispaman SL (GDH), a distributor of Yale forklifts in Spain. The transaction was valued at €8 million.

■ **Hilti** and **Trackunit** have partnered to make data available across their platforms. Tools registered in Hilti's ON!Track system can be viewed on Trackunit, heavy machinery equipped with Trackunit hardware can be viewed in ON!Track.

■ **Yardz**, the US IT platform for contractors' management of rental equipment, has partnered with EquipmentWatch, which supplies data on heavy equipment. The deal will allow Yardz to import data through the EquipmentWatch interface.

■ UK company **Speedy** confirmed positive trading and fleet investment in its trading update with momentum of the first half year continuing into Q3 2021.



Ramirent's 'green shift' colour scheme and eco-labelling.

PHOTO: RAMIRENT

Ramirent launches first 'green shift' branch

Norway's Ramirent has established a 'green shift' customer centre in Oslo, Norway, by transforming an existing branch in Alnabru in the north-eastern area of the Greater Oslo region.

The move is designed to meet Oslo's new emissions-free by 2025 construction sector target, confirmed Fredrik Brandal, Ramirent Executive Vice President; "...we now want to take the lead in green rental in Greater Oslo," he said.

The centre has been given a new green colour scheme and eco-labelling; it will stock Ramirent's entire portfolio of low-carbon machinery and provide biofuel services.



Bauma construction trade fair, Munich 2019.

97% of space booked for Bauma 2022 trade show

Messe München says 97% of the available space has now been booked for its Bauma construction trade fair, set to take place in Munich between 24 and 30 October this year.

The exhibition was originally planned for April, but a year ago the organiser acknowledged there was "a growing recognition that the April date involved too many uncertainties in view of the

global pandemic" and pushed the event back.

Messe München says this year's Bauma will see particularly strong representation from the mining sector.

Key exhibitors representing mining equipment will include BHS Sonthofen, Herrenknecht, Komatsu, Liebherr, Schulte Strathaus and Zeppelin Baumaschinen.

The Bauma 2022 trade event will include



BIM enables rental companies to become involved at the design stage of a project.

IMAGE: ERA

New ERA guide to BIM for rental companies

The European Rental Association (ERA) has published a beginner's guide to Building Information Modelling (BIM) to give rental companies guidance on how BIM can help them deepen their relationships with customers.

ERA said BIM gives rental companies the opportunity, for the first time, to become involved at the design stage of a project.

By engaging in BIM, said the association, rental companies can help improve productivity, make sites more equipment friendly, and provide the optimum product for each stage of a project's development.

An Innovation Hub, including a zone dedicated to the deeper understanding of how technology can connect machines and how construction businesses can make best use of data.

Ahead of the fair, Bauma is launching a new webinar series, to start in March.



Yanmar Compact Equipment EMEA has updated its ViO17 zero tail swing mini-excavator. Described as versatile, robust and reliable, the next-generation model is designed for general construction and civil engineering applications. It is powered by a Stage V-compliant diesel engine from Yanmar's TNV series, which offers both low fuel consumption and "minimal emissions" and has a maximum digging depth of up to 2310mm.

RentalTracker survey: Europe's rental sector remains positive

The Q4 2021 ERA/IRN RentalTracker survey – undertaken at the end of 2021 – shows levels of rental business confidence in Europe remain at a good level since the previous survey in June 2021.

Historically high levels of sentiment from Q2 2021 were sustained through to the end of the year, meaning that 70% of respondents were seeing increasing time utilisation at the end of Q4, with a positive balance of 65%. In terms of business conditions at the end of 2021,



there was a positive balance of opinion of 49%, with 57% seeing conditions improve, 35% reporting no change, and 8% experiencing worsening conditions.

See the full story on page 10.

IN BRIEF

■ UK company **Speedy** confirmed positive trading and fleet investment in its trading update, with momentum of the first half year continuing into the third quarter of its financial year to 31 December. UK and Ireland rental revenue for the nine months was 4% ahead of the previous corresponding period.

■ Roadbuilding specialist **Wirtgen** has launched three compact cold milling

machine models in the one metre class for the European market. The Wirtgen W100 Fi, W120 Fi and W130 Fi models offer working widths of 1.0m, 1.2m and 1.3m, respectively.

■ French rental company **Eurolev Vertical Solution** has added two Palazzani spiderlifts to its fleet. The company, which specialises in access equipment, recently took delivery of the

Palazzani bi-energy XTJ 37+ and XTJ 52+ crawler models.

■ US company **McGrath RentCorp** has acquired **Titan Storage Containers**, a regional provider of portable storage in the Texas market, adding 1,100 units to its existing Mobile Modular division fleet.

■ Nordic rental company **Cramo** has opened a new facility and flagship store

in Sweden, to meet growing demand for electrified scissor lifts. In addition to electrified lifting, the 7500 square-metre site in Arlandastad, north of Stockholm, will supply a range of construction machinery and services.

■ UK rental brand **Groundforce Attachments** has launched e-commerce for excavator attachments; with some available for next-day delivery.

HIGHLIGHT



- Load sensitive hydraulic system of substructure make the movement more energy-saving.
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RentalTracker survey:



Europe's rental sector remains positive

The Q4 2021 ERA//IRN RentalTracker survey – undertaken at the end of 2021 – shows that levels of rental business confidence in Europe remain at a good level and have not changed dramatically since the previous survey in June 2021.

The Tracker, which is organised by the European Rental Association (ERA) and International Rental News (IRN), reveals that in a wide range of measures – from business confidence and future expectations to employment intentions and fleet utilisation – the historically high levels of sentiment from Q2 2021 were sustained through to the end of the year.

That means, for example, that 70% of respondents were seeing increasing time utilisation at the end of Q4, with a positive balance of 65%. In other words, 70% reported improvements and only 5% reported

FIGURE 1

EUROPE Business conditions now

Q4-21

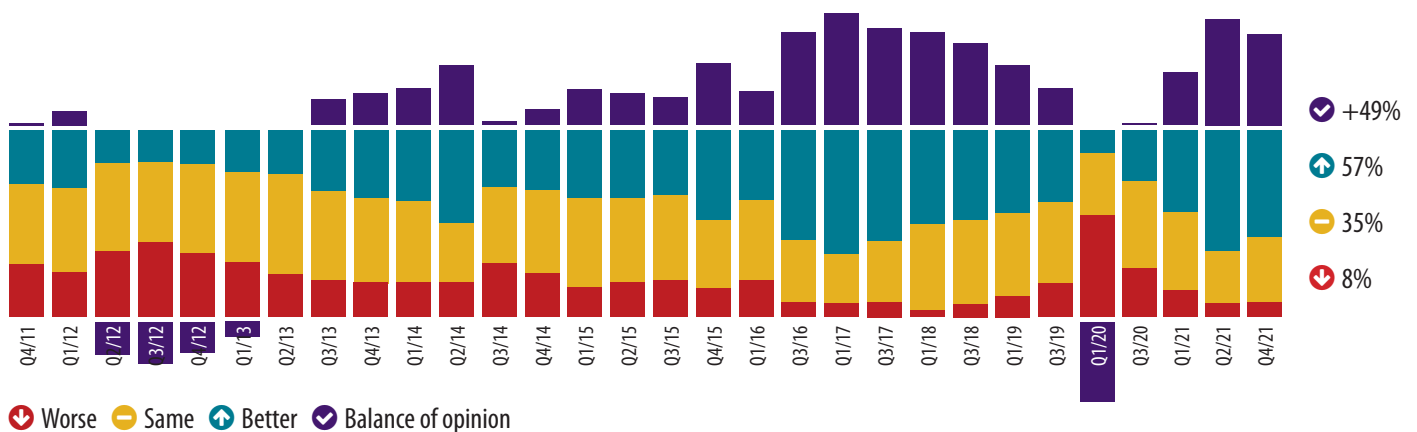


FIGURE 2

EUROPE Expectations for year from now

Q4-21

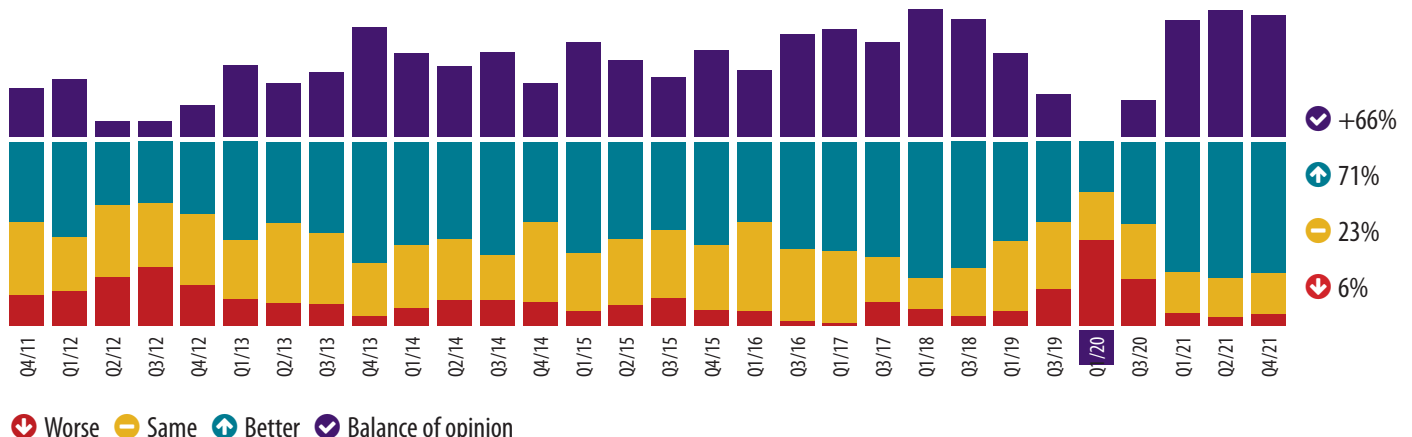
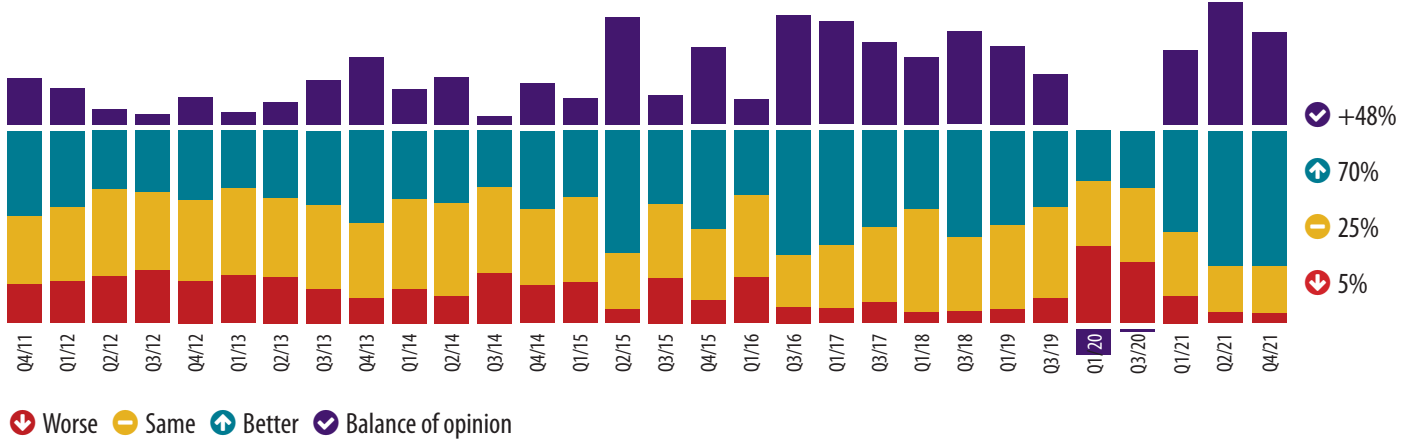


FIGURE 3

EUROPE Time utilisation trend

Q4-21



“ In terms of business conditions at the end of 2021, there was a positive balance of opinion of 49%, with 57% seeing conditions improve, 35% reporting no change, and just 8% experiencing worsening conditions. ”

worsening utilisation.

More than 125 companies in Europe - predominantly equipment rental businesses - responded to the survey.

Employment intentions

Likewise in employment intentions, 70% of respondents said they were expecting to add staff in the first quarter of 2022.

That mirrors the level seen in June last year and means companies who were thinking of adding staff seven months ago were still hoping to boost their workforce as the new year started. (It could also mean that they are

finding it difficult to recruit.)

In terms of business conditions at the end of 2021, there was a positive balance of opinion of 49%, with 57% seeing conditions improve, 35% reporting no change, and just 8% experiencing worsening conditions.

That remains a very positive picture, even if it is slightly less so than the second quarter of 2021, when the positive balance was eight points higher at 65%.

How have investment intentions for 2022 changed since the middle of last year? Six months ago, 68% of respondents were anticipating higher spending in 2022, with only 6% forecasting a lower spend. Now, 63% expect

TABLE 1

Forward thinking

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

Spain	86%	(89%)
Nordic	81%	(64%)
All Europe	71%	(74%)
Benelux	50%	(-)
France	43%	(67%)

to increase spending in 2022 and 6% will spend less.

The positive balance of opinion – at 57% – is only a few percentage points behind the Q2 2021 survey and reflects the continued recovery from the lower investment during the pandemic period. In 'normal' conditions there is >

TABLE 2

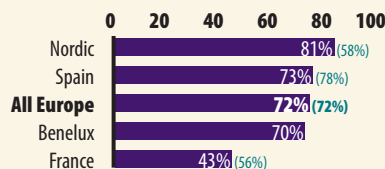
The here and now

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

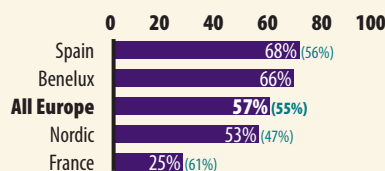
PERCENTAGE OF COMPANIES EXPERIENCING IMPROVING MARKET CONDITIONS (END Q4, 2021)

Nordic	73%	(52%)
Spain	68%	(78%)
All Europe	57%	(65%)
Benelux	40%	(-)
France	17%	(53%)

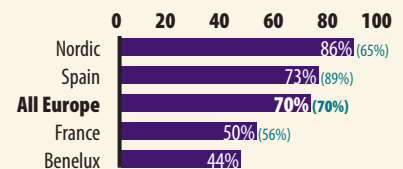
PERCENTAGE REPORTING Q4 2021 GROWTH VS Q4 2020



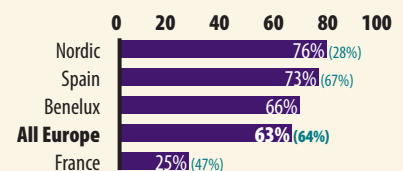
PERCENTAGE WHICH WILL EMPLOY MORE IN Q1 2022



PERCENTAGE WITH INCREASING UTILISATION IN Q4 2021



PERCENTAGE EXPECTING TO INCREASE INVESTMENT IN 2022



Survey info

IRN would like to thank all the associations who helped us to distribute the survey and all the individuals who completed the online questionnaire. More than 125 companies in Europe - mainly rental companies - responded to the survey.

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

typically a positive balance of between 10% and 30% on the question of 'spending more'.

Regional rental trends?

Regional or country trends are more difficult to assess, partly because relatively low respondent numbers from some individual countries make it difficult to provide definitive results.

However, it is clear that Nordic countries – taken as a whole – are more confident than their counterparts in southern Europe.

In every measure, their confidence levels have improved since Q2 2021. That is most notable in their investment intentions, with 76% expecting to spend more this year than last.

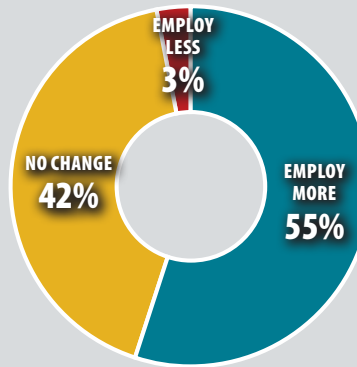
Meanwhile the figure was 73% of respondents in Spain, 66% in the Benelux region and a much more cautious 25% in France, which experienced high levels of Omicron infections in the last quarter of 2021.

In contrast, French companies seem to be much more cautious. They were least likely to report improving

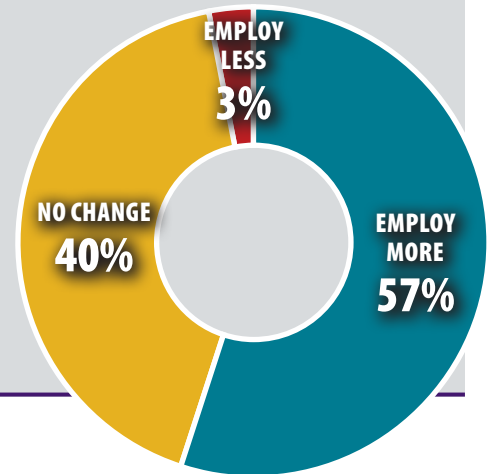
FIGURE 4

EUROPE Employment intentions for next quarter

Asked end of Q2 2021



Asked end of Q4 2021



conditions or make positive predictions about conditions a year from now, and were also the most shy in terms of investment in 2022 and recruitment in the first quarter of 2022.

No doubt the high rates of Omicron infections in the country at the end of December – when the survey was done - had a significant impact here.

Looking ahead

Looking ahead, despite the caution in France, countries' outlook for 2023 was generally very positive. Asked if business will be 'better' or 'much better' 12 months ahead, there was a 'yes' from 71% of all European respondents,

86% of Spanish respondents, and 81% of Nordic respondents.

Spain retained its generally positive outlook in most areas, including fleet utilisation, recruitment and investment in 2022. Spanish companies were also the most optimistic, with 86% forecasting better or much better conditions in 12 months' time.

So, the Q4 2021 RentalTracker makes for mostly positive reading. Europe's rental industry continues to climb out of a pandemic-sized hole. **IRN**

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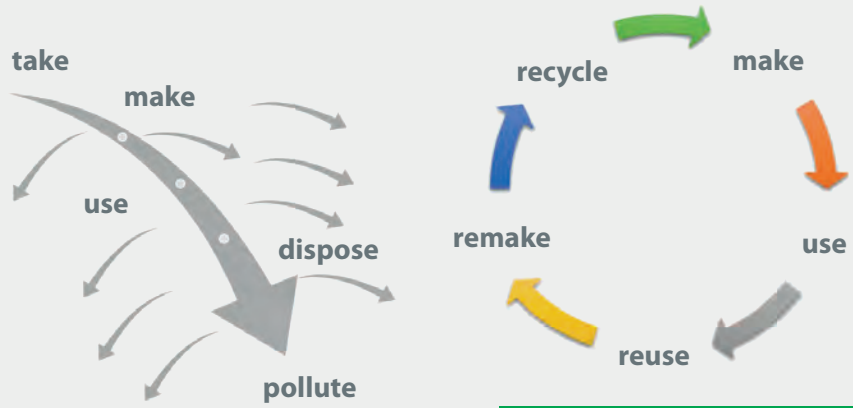
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New IRN columnist Andy Wright, the CEO of Sunbelt Rentals UK, says that sustainability, and the ways that it is impacting the rental industry, will be at the heart of his first series of columns.



A diagram contrasting the 'take, make, waste' linear approach and the circular economy approach.

IMAGE: CATHERINE WEETMAN, CREATIVE COMMONS BY-SA 4.0 -[HTTPS://CREATIVECOMMONS.ORG/LICENSES/BY-SA/4.0](https://creativecommons.org/licenses/by-sa/4.0/)>, VIA WIKIMEDIA COMMONS

Sustainability: unpacking the issues

Question. What's the number one issue at the top of every senior team's agenda right now? A few years ago, the answer would have been safety or safe working. Today, it's unequivocally the issue of sustainability and building a sustainable business model that meets the demands of the new world in which we all operate. This is the challenge every senior team in every organisation is facing up to.

For our industry safety is still highly important and is, of course, a fundamental component of sustainable working. But we have made such fabulous progress as an industry in this area, that it's now an expectation rather than an aspiration: without the ability to work safely you don't even get a ticket to the game.

After working in the Middle East for six years, I moved back to the UK at the end of 2015 and was surprised to see the progress that had been made around sustainable power production. This culminated in the first ever fossil fuel free day for the UK soon after I returned. That, coupled with an increasing focus on sustainability in discussions with clients and contractors across all sectors, clearly highlighted the changing focus in this area. It was no longer just words and aspirations – everyone wanted to see real action being delivered behind the words.

In future columns I will explore this topic in greater detail and unpack many of the crucial aspects of how and why it's important to develop a sustainable rental company and consider some of the challenges we all face in doing this. A great place to start, though, would be to agree about what we mean when we talk about sustainability, because it's not just about the environment and carbon reduction, as important an issue as that is.

There are many definitions of sustainability, but my personal favourite is simply put; 'to meet our own needs without compromising the ability of future generations to meet their own needs'.

This for me is what it's all about. How do we continue to live and deliver today's priorities whilst ensuring that our children and our children's children have a world in which to live successfully and safely, and which leaves them in a

position to build upon what we have achieved? It is our responsibility to ensure that we leave the planet and our society in the best possible position to allow them to do this.

The rental industry has a crucial role to play because it supports many of the factors that are important in delivering a sustainable planet. Often, people confuse sustainability only with environmental issues and as I have said, whilst the environment and the reduction of CO₂ is critical in tackling the climate crisis, there are other considerations we need to focus on to help create a sustainable business model.

Profits, planet and people

In addition to the environment, we need to focus on social and economic issues. Collectively these three areas are sometimes described as the three Ps of profits, planet and people. I will focus on each of these areas in future articles.

So how does rental help us to deliver a more sustainable world?

To start with - our rental industry is at the heart of the circular economy. The circular economy is a model that seeks to tackle many of the environmental challenges that we face because of the historically linear approach towards industrial activity and work. This has meant that product has traditionally been manufactured, utilised and disposed of, in contrast to the circular

approach of sharing, leasing/renting, reusing, refurbishing and recycling existing products.

In the circular economy the goal is to keep products in use for as long as possible, an approach consistent with the goals and normal activities of a rental business. It's partly because of this shift in thinking that the outlook for the rental industry is bright, but there are challenges ahead and I intend to tackle them in future articles.

Finally, I would like to emphasise that any ideas, opinions or conclusions that I draw in writing these articles are from a personal viewpoint and do not necessarily represent the corporate view of Ashted Group plc or Sunbelt Rentals in the UK or North America. I hope that you enjoy reading them. **IRN**

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



Tech-driven rental equipment company SitePro Rentals is a new player in the southern states of the US, following a move by Sammons Enterprises – owner of Briggs Equipment in the US, UK and Ireland - to split out its general equipment rental activities from its industrial forklift business. Belinda Smart spoke with SitePro President Tim Rule.

New business, new rules

Start-ups bring with them new energy and dynamism. In the case of equipment rental player, SitePro, that sense of untapped potential is also balanced by experienced leadership and local market knowledge.

Part of Sammons Industrial and with nine locations in Texas, Louisiana and Georgia, SitePro was officially incorporated on 1 December and is led by former CNH Industrial and United Rentals executive Tim Rule.

Rule has been with Sammons Industrial since 2020 and brings with him both domestic and international experience with big industry players. He travelled widely and met rental companies across the world in a business development role for United Rentals, and also ran large businesses for the company. "That's a lot of best practice in terms of seeing how international companies meet challenges and innovate," he tells *IRN*.

Point of difference

At SitePro, he'll be focussing on three elements: customer service, customer relationships and technology.

"I see some companies that do customer service really well, others are good at building customer relationships, some have made progress on the technology side,

providing useful tools for customers. But we're striving to be the best at all three, and that's our point of difference, our secret sauce."

In terms of customer service and relationships, putting together a dedicated team was one of Rule's first tasks. The company retained legacy staff, including 75 employees from Briggs, and supplemented these with new hires. It has already built up its staff to a current total of 120 employees and predicts it will grow this to 180 by the end of 2022.

Meanwhile, technology comprising a customer portal and app will be key to the digital experience for customers, enabling online ordering, rental management, equipment location, access to equipment, as well as payments and payment enquiries.

Explaining the benefits of new technology, Rule says he sees no reason why rental shouldn't be as easy as "ordering in."

"We're in a world where you can track your pizza delivery, so why not that way in equipment rental? We're looking outside the industry as well as inside it to take connectivity to the next level. We think this will be a real point of difference in the Texas market.

"If you're a busy contractor and you've got a piece of

equipment down, you need to know when it's going to be up and running because you've got a crew waiting. We'll be providing connectivity to our system on a real-time basis, so you know when that technician has been dispatched, how far away they are and when the repair is complete.

"If you've made an order, you're aware of that order

**Tim Rule,
SitePro
President.**



SitePro's immediate focus is on developing competency in establishing cold starts.



status, in terms of how far away the delivery driver is.”

He believes such features are ever more valuable to customers.

“Increasingly, customers can’t afford downtime; they’ve got crews waiting for those deliveries, so, things like on-time delivery, on-time pick up, rapid resolution of

“ We’re in a world where you can track your pizza delivery, so why not that way in equipment rental? [...] We think this will be a real point of difference in the Texas market. ”

breakdowns when they have a mechanical issue, are really important.

Using its in-house IT team, along with third party companies where needed, SitePro is developing “a highly configurable tool,” he says.

“You’ll be able to go into your customer account and decide which notifications you need. Say you want to know every time the truck leaves our branch with your equipment, or you want to know when the machine is repaired. You’ll have the option to configure the system to provide the notifications that are important to you so you can stay connected to your fleet.”

Fleet investment

The fleet-building process for SitePro began in 2021 with about \$75 million legacy fleet from Briggs Equipment, mainly aerial booms, scissor lifts and telescopic handlers. With a high average age, some machines were replaced, and growth fleet added, Rule says.

The company ended 2021 with a slightly larger but much newer fleet, and with ambitious plans for 2022. “Our capital expenditure for 2022 will be north of \$100 million,” he tells *IRN*.

As a full service company, it will expand beyond aerial

equipment to include categories such as earthmoving and compaction. “Right now, our aerial fleet is somewhere around 85% of our total fleet but we’ll end next year closer to 65%. The target percentage for aerial, if you include telescopic handlers, is probably around 55%.”

SitePro will stock brands from two to three strategic suppliers in each category; in earthmoving Case, Deere and Bobcat; in compaction Hamm and Multiquip; in aerial MEC, JLG and Genie. In forklifts, it will carry Hyster-Yale machines - its sister company is a Hyster-Yale dealer - along with JCB telehandlers.

“For earthmoving equipment, we’re focused on contribution margin, in other words, profit of each unit in your fleet,” says Rule. “When you look at larger earthmoving equipment, contribution margins are lower than smaller units such as mini excavators or loader back hoes. We have to find that balance.”

“We don’t want to be everything to everyone, but we do want to be a one-stop-shop for customers, so that means we’d probably stop at a 20 metric ton excavator. We may have a few bigger than that, but our core will be 20 metric tons and smaller, with a full offering of that medium and smaller metric ton equipment.”

“If you look at the forklift industry, forklifts are moving to electric, and you can see that in our sister company where the mix of electric forklifts as opposed to those powered by propane and diesel continues to grow.”

SitePro’s fleet will be backed by telematics and mobility technology to provide customers with tools to manage fleet and increase uptime.

The company also has an eye to sustainability.

“At SitePro, a proportion of our boom lifts are re-manufactured,” says Rule, “JLG makes an outstanding remanufactured boom lift and we’re taking advantage of that. Not only is it a sustainable practice but it drives better contribution margins for us.”

Splitting operations

An important first step in establishing SitePro was splitting equipment rental from the Sammons business, which manages equipment businesses in North America (including Mexico), the UK and Ireland.

“Sammons saw an opportunity to do better at rental,” Rule tells *IRN*. “Running a rental business and a dealership business at the same site is difficult, so the opportunity to split out the businesses meant both businesses could focus on their core competencies and do better.”

It has been a complex operation. “We launched a new business system on 1 December, and we’ve been transferring the legacy data over to the new system: customer, payroll and fleet data. Getting the data properly formatted and cleaned up prior to transfer was a crucial step that ensured that we have good data from the start, so we’ve invested resources in ensuring our data is clean.”

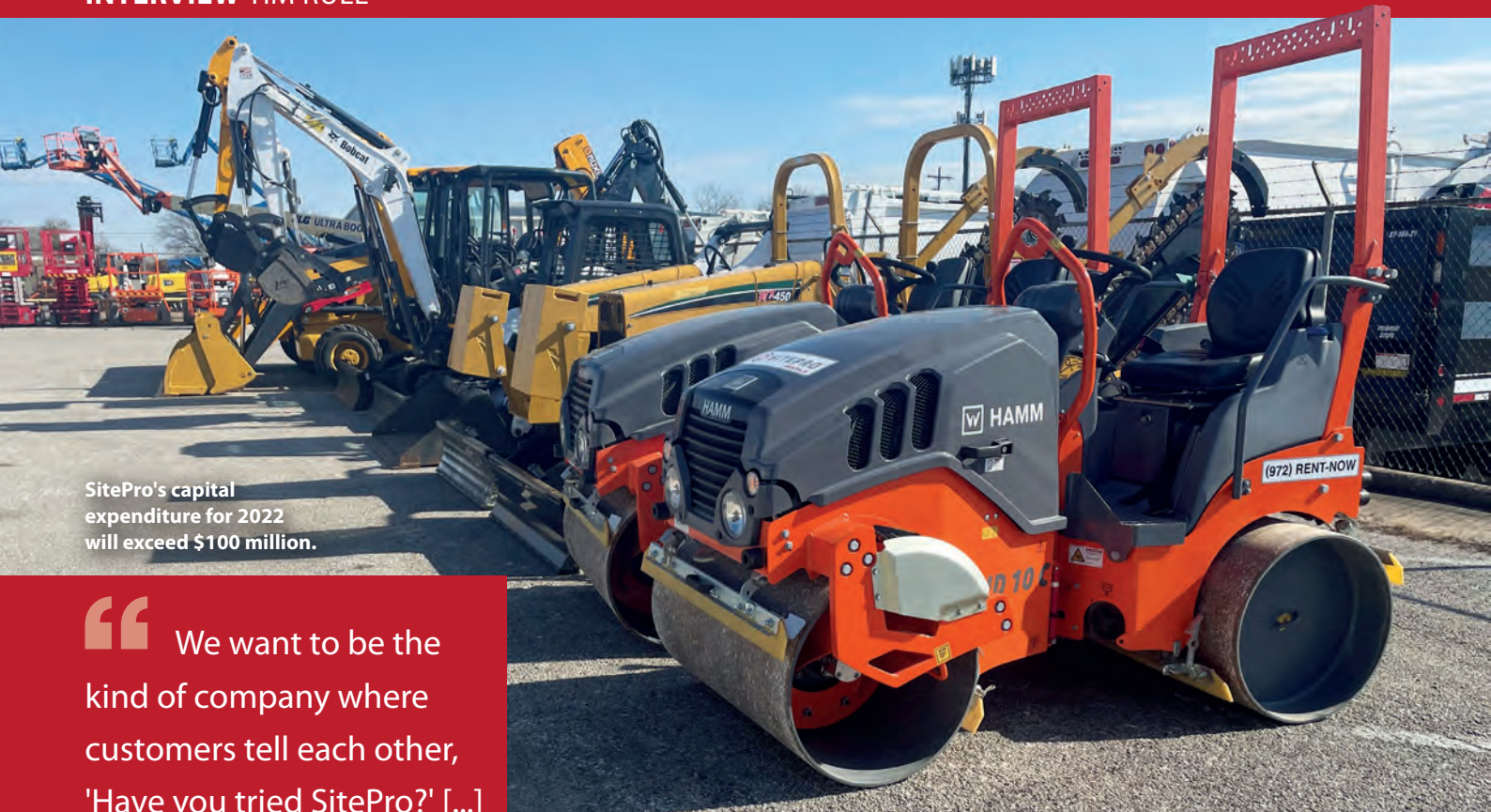
Expansion

SitePro already has plans to expand its branch footprint in 2022 with three new locations in its headquarter city of Dallas, as well as in Fort Worth and Atlanta.

Further ahead, SitePro has ambitions to be a national company, but not before it has established itself in its local markets.

“We’re not focused on being the biggest, we’re focused on being the best. We’re initially going to grow out our footprint in the southeast United States and we’re going to build a network of locations, so we can fluidly share fleet between locations, then we’ll grow from there.”

“We’ll look at markets strategically and at the opportunities in front of us, but we’ll also be opportunistic and grow through mergers and acquisitions. Our focus right now is developing a competency to establish cold starts, but if the opportunity comes along >



SitePro's capital expenditure for 2022 will exceed \$100 million.

“ We want to be the kind of company where customers tell each other, 'Have you tried SitePro?' [...] That's really our goal. ”

“Demand for construction equipment is strong – we're seeing that in some of the results being announced by the major players in the US.”

Supply challenges

And like many, the company has had to deal with supply-related challenges.

“Equipment is scarce, so we are placing orders for equipment well before we would in a normal year. Part of that is to do with supply side issues, it's also driven by strong demand for equipment by rental players. We placed orders for 2022 in the summer of 2021, when traditionally those advance orders would be placed in the fall.”

Such hitches aside, Rule says the overall climate is favourable.

“If you look at US and Canada, traditionally we benefit from a strong economy, steadily growing rental penetration and favourable rental economics relative to other western markets. We're not driven by a rate structure and 28 day billing cycle, and we benefit from a relatively low cost of doing business. There's plenty of room for growth here.”

With a tech-driven, customer-focused strategy in the southern markets of the US, SitePro is positioning itself to capitalise on that growth.

“We're not looking to be the biggest; we want to be the best,” says Rule. “We want to be admired by customers. We want to be the kind of company where customers tell each other, 'Have you tried SitePro?' because of the amazing customer experience. That's really our goal.” **IRN**

to make an acquisition, we'll also do that.”

“SitePro might someday be a global company,” he adds. “We're certainly keeping our focus in the short term on where we're at now. Our Briggs business in the UK is highly successful, it's doing well and expanding into Ireland.”

And in the US market, SitePro won't necessarily factor in the Briggs Equipment footprint when thinking about SitePro openings, he says; “We're looking at different markets for their attractiveness.”

For now, the outlook is positive, both in the US market generally and for SitePro.

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HOW TO BUILD

Environmental sustainability is now a top priority for many rental companies. Belinda Smart spoke to businesses about how they are setting and reaching goals in this area.

The concept of sustainability encompasses environmental, economic and social factors, but the first of these – the environment – continues to top the agenda for many rental businesses.

In light of the recent Glasgow COP26 climate conference, this needs little explanation. When COP26 wrapped on 31 November, countries' commitment on greenhouse gas emissions cuts was widely regarded as disappointing; it was insufficient to limit global warming to the required 1.5 degrees Celsius.

A sense of urgency now underscores thinking about sustainability in the mature markets of the rental and construction sector, as illustrated by a statement from an article published by McKinsey - 'The role of ESG and purpose'.

"Purpose and environmental, social, and governance

A sustainable rental company

(ESG) issues represent critical challenges for both boards and executive teams. They have become particularly salient since the Covid-19 pandemic, which has forced corporations to scrutinise their responsibilities and role in society."

For equipment rental companies, CO₂ emissions reduction, regulated by Stage V restrictions in Europe and their equivalent in other markets, is the most pressing challenge.

Brand reinforcement

In the French market, Kiloutou Group has made a commitment to reduce direct GHG emissions by 40% by 2030, in line with the Paris agreement.

Sustainable Development Director François Renault tells *IRN* recent initiatives include the greening of Kiloutou's HGV and light vehicles fleet and reduction of energy consumption in branches. "The true priority however is reducing fossil fuel carbon emissions," he says.

Launched in October, Kiloutou's new iMPAKT brand

for low carbon equipment is intended to help customers identify low emissions machines and reduce the environmental impact of their worksites. An alternative equipment guide has also been made available to Kiloutou staff and customers.

For Renault, motivating the construction equipment industry to change is a challenge and a responsibility.

"The rental industry is at the heart of decisions. Targets and action plans must be synchronised with the various players in this sector: its suppliers, its customers as well as business federations."

This was the motivation for a series of sustainability meetings with industry stakeholders, the first held last May, the second in December. Another meeting has been scheduled for 2022.

Renault says he recognises the scale of the challenge ahead, particularly in light of COP26, but adds that concern should be offset by determination.

"Obviously our eyes were on Glasgow, and we can be partly disappointed with the lack of commitment from



A Coates Hire telematics device. The Australian company is investigating how data can support energy efficiency and greenhouse gas emissions reductions. PHOTO: COATES HIRE

some countries. This in no way demotivated us. On the contrary, we believe it is all the more important that the construction equipment industry take its share of responsibility and offer concrete solutions to limit the impact of construction sites.”

Data driven results

Concrete solutions can emerge from the use of data, and this is the case for Danish company GSV, which began its “green transition” in 2018.

Environmental responsibility is “a prerequisite for doing business,” according to CEO Dan O. Vorsholt. He says the construction industry causes the equivalent of 10% of Denmark’s total emissions, “so the industry needs to come together and act.”

GSV’s goal is to cut CO₂ emissions from its machines on Danish construction sites by investing in electric and battery-powered machines.

“We believe that digitalisation is a big part of the solution. We have internally optimised the time in which our machinery is in workshops, under preparation or in logistics from 16% to 8%. This is done by making internal processes leaner.

“This means that our machines are used more effectively, and the utilisation is optimised; and that means that we can settle for fewer machines to the same amount of work - and as the machinery need to be replaced, we can upgrade each machine to a more climate friendly alternative.

“Across the industry, we also see too much idle time when it comes to machinery. By giving our customers a better digital overview of the fleet with our digital renting tools, GSV now helps our customers optimise fleet management and enhance the use of machinery.

This year, GSV will release a new digital platform to help customers measure and document the CO₂ footprint of the machinery and construction site, with further details to be revealed in the coming months.

Another Nordic company, Kranpunkten in Sweden, places a premium on “green” outcomes with its business goals, as sustainability manager Petra Lampa tells *IRN*.

“The goals include being the best in the industry in terms of service, machinery and working environment, as well as having the industry’s least environmental impact and becoming completely climate neutral.”

Goals and results are continuously monitored and presented in an annual sustainability report. Milestones over the last five years include 80% of the rental fleet refuelling with the alternative fuel HVO100, and all company and service cars that run on fossil fuels to be phased out by 2025.

The company is inducing its carriers to switch to fossil-free alternatives and installing solar cells at depots and recently invested an electric truck for transporting lifts to and from customers’ workplaces.

Innovation centre

Bricks-and-mortar commitments can be as important as data and digitalisation, which is the case for UK rental firm Speedy Hire, which opened a low carbon innovation and rental centre in November.

Located in Milton Keynes, Buckinghamshire, the 9000-square metre site’s initial purpose is to support contractors building the first phase of HS2 high speed rail project from London to Birmingham, with low-emission equipment including electric lighting towers and track laying machinery. It will also showcase electric, solar and hydrogen powered technologies.

The centre, along with other carbon reduction initiatives, demonstrates Speedy’s role as “a key enabler within the supply chain,” says Amelia Woodley, Speedy ESG director, who was appointed to the newly created position in mid-2021.

The company has now developed an ESG framework, and recent initiatives include, in November, Speedy’s



PHOTO: GSV

Swedish company Kranpunkten has acquired an electric truck for transporting lifts. PHOTO: KRANPUNKTEN



“ We believe that digitalisation is a big part of the solution. We have internally optimised the time in which our machinery is in workshops, under preparation or in logistics from 16% to 8%. This is done by making internal processes leaner. ”

DAN O. VORSHOLT, CEO, GSV Denmark.

public commitment to adopting Science-Based Targets (SBT) to achieve net zero carbon emissions. An emissions target is 'science-based' if it is in line with the reductions needed to meet the global commitment under the Paris Agreement to limit global warming to less than 2°C above pre-industrial levels, and pursue efforts to limit warming to 1.5°C.

Speedy is also implementing low and zero carbon fuel and power sources across the business, Woodley tells *IRN*.

New frontiers

In another first, the largest rental company in the world, United Rentals' is pushing boundaries. In its Corporate Responsibility Report 'Forward Together' released late last year, the group confirmed it had started tracking and reporting its scope 3 greenhouse gas (GHG) emissions.

Scope 3 includes other indirect emissions in a company's value chain and represents wider sectoral responsibility, building on Scope 1 - direct emissions from owned or controlled sources, and Scope 2 - indirect emissions from the generation of purchased electricity, heating and cooling.

United is now working with OEMs and customers to reduce the Scope 3 emissions from rented equipment at construction projects and job sites.

Circular economy

Australia's largest rental company Coates Hire has adopted circular economy thinking to guide its efforts in environmental sustainability, Sheridan Jones, Group Manager - Corporate Communications & Sustainability, tells *IRN*. According to a UN definition, the circular economy "aims to minimise pollution and waste, extend product lifecycles and enable broad sharing of physical and natural assets."

Reducing carbon emissions is a key priority for Kiloutou Group.

PHOTO: © FRANCK DUNOUAU



Power play

Power generation specialist Aggreko has committed to halving the amount of fossil fuel in its customer products and reaching net zero in scope 1 and 2 emissions from its business operations, by 2030. "By 2050 we aim to be a net zero business across all the services we provide," a spokesperson tells *IRN*.

Aggreko's recent measures include battery storage innovation; techniques to turn waste gas to power in industrial processes; adopting cleaner fuels including HVO and solutions including renewables, such as solar, as well as piloting a fleet of hydrogen generators.

"By providing temporary equipment solutions for businesses, we avoid costly capital outlay and reduce overall equipment purchases or manufacture."

The company has publicly committed to a 30% reduction in scope 1 and 2 emissions by 2026. By 2030 it aims to achieve a 50% reduction in Scope 1 and 2 emissions and by 2040: net zero scope 1 and 2 emissions.

Meanwhile Coates' 'Greener Choices' catalogue, due to be released mid-2022, is designed to support customers' sustainability goals. It will highlight equipment benefits such as reduced energy use, lower emissions and reduced noise impacts on site.

"We also continue to explore how our IoT data can help to minimise and reduce fuel burn on future projects, a key requirement of many sustainability programs." **IRN**

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Despite the pandemic-led uncertainty of 2020, demand for rental services has held steady in the UK, driven by government stimulus, infrastructure and housing projects; and the outlook for 2022 and beyond looks positive. Underlying trends, such as the move to low emissions equipment are also influencing demand.

According to the Construction Equipment Association (CEA), sales of construction and earthmoving equipment maintained their strength in the final quarter of 2021, showing an increase of 18% compared to the same quarter in 2020. Sales for the whole of 2021 finished the year 48% above 2020 levels, although 2020 was of course a Covid-impacted year.

The RICS (Royal Institute of Chartered Surveyors) construction survey for the final quarter of 2021, published in early February, found that for the last quarter of 2021, a positive balance of +33% of respondents reported rising workloads, with infrastructure and private housing being the two most positive sectors.

Businesses are also adapting to challenges including supply chains delays and rising fuel prices.

Rental strength

If leading firms are any indication, the UK rental sector is in reasonable shape. Take Speedy Hire, which has performed well despite the pandemic, according to chief executive Russell Down. "Overall, we're operating in a strong market at the moment, with a significant number of infrastructure projects such as HS2 and Thames Tideway [the London 'super sewer']," he tells *IRN*.

In 2022, Speedy will also continue the roll out of a DIY offering online and through Speedy in-store locations at B&Q DIY and builders merchants' sites in the UK, with consumer interest in DIY driven by pandemic lockdowns and restricted travel.

"What started as 16 trial stores in July 2020 will now see an additional 23 outlets opening nationwide", said the company.

Another major business, Sunbelt Rentals UK, also reports that during 2021 rental markets remained strong, across the plant, tools, powered access, power, traffic, survey, safety, lifting, accommodation, climate control, utilities, test/monitoring and rail categories.

"The physical utilisation in all these areas is up on the previous 2019 peak - some product categories seeing utilisation as high as 90%+" Dave Harris, Sunbelt sales & marketing Director tells *IRN*. "Across the year we will achieve revenues in excess of £600 million from a rental fleet of over £900 million."

Strong performers over the past 12 months include Sunbelt's temporary roadway division Trakway Hire and portable accommodation, "where the number of projects across the UK including some large infrastructure projects, and industrial shutdowns have soaked up tremendous demand."

In lighting, the majority of Sunbelt's fleet of 5,000 towers are out on hire this winter, and demand for power is being driven by requests for hybrid solutions.

Companies operating in the UK rental sector report a rebounding market, while most are adapting to supply and fuel price challenges, writes Belinda Smart.



UK market



Speedy Hire reports a strong market, driven by major projects such as HS2 and Thames Tideway.
PHOTO: SPEEDY HIRE

Meanwhile, as a major player in the UK rental market, GAP Hire Solutions offers a benchmark of business confidence. It has just opened a Pump Services specialty division with an £18 million investment including Stage V pumps and related equipment.



Auction insights

Rupert Craven, UK and Ireland Sales Director at auctioneer Ritchie Bros, says: "Over the last year we saw a big change after Q3 2020; so, in Q4 2020 and the whole of 2021 - similar activity over five quarters with similar market conditions. Where there isn't a great deal of machinery around, utilisation has been high across all assets in machine fleets.

"Demand is very high, either for rental companies to buy and re-hire, for overseas buyers to take out of the UK or from end-users wanting to buy machines directly. Volumes from rental companies are down and if they are getting new machines, they're going straight out on hire. Through Q2 of 2021, the March and April lockdowns hit and then Q3 and Q4 last year when manufacturers weren't making, has created a long term supply issue and that will take a couple of years to work itself out. Pricing has responded with increases across all asset groups from 2019 to 2021 to 2022."



Sunbelt Rentals UK's temporary roadway system Trakway and portable accommodation have performed well over the past 12 months.

PHOTO: SUNBELT RENTALS UK

rebounds

OEM perspective

Fenella Tolhurst, Construction Key Account Manager at Kubota UK, tells *IRN*; "Last year saw a significant increase in the excavator market in the UK and ROI, with the 0-6 tonne market growing by 49% and the 6-8 tonne market growing by 77%."

Kubota's claimed market share of over 30% of the UK's mini-excavators holds steady; and demand for its machinery has been robust over the past 12 months as contractors and hire firms renew their fleets in the rebound from the pandemic. However, supply issues hamper investment strategies. While the Government's stimulus package has boosted demand. "this leaves hire firms in a tricky situation in their machinery buying and selling cycle due to lead times being so difficult to anticipate. The shortage of machinery is so challenging that we are already taking orders for 2023."



GAP Hire Solutions invested £18 million in its new Pump Services specialty division.
PHOTO: GAP HIRE SOLUTIONS

A relative newcomer, Synergy Hire, which specialises in Hitachi excavators, launched in May 2019, just months before the pandemic's emergence in early 2020.

"However, demand for our Hitachi excavators has pleasingly exceeded our budgeted forecasts," says company co-founder John Fitzpatrick, who was previously involved with London-based One Call Hire before its merger with Fork Rent and subsequent creation of Ardent Hire.

The company supplies excavators in the 3 to 50 tonne weight range to the UK construction industry, and Fitzpatrick tells *IRN* all its models have been in high demand since September 2020, once the initial Covid-19 shock dissipated. The strongest demand has been in the 30 to 36 tonne sizes (the ZX300LC-7 and ZX350LC-7 models).

"We have the largest fleet of ZX350LC-7-CTA telescopic 25 m and 30 m dig depth machines in Europe which work well alongside our tunnelling ZX135US-6-SRF models. Both these highly specialised models were bought in anticipation of HS2 works, however they have to date been used on various central London projects with very deep basements."

Projected increased UK government infrastructure spending and higher private housing and commercial warehousing spending in 2022 will drive UK rentals, he says.

However, looking ahead, "interest rates cannot go lower and are projected to rise steeply over the coming five years to offset high inflation," which will result in cash flow challenges.

"Those hirers that can differentiate and give a great, valued service will not only survive but thrive over the coming years."

Supply and fuel prices

Fitzpatrick says supply of new machinery was affected from March 2021 on. To mitigate the shortfall, the company extended the disposal ages of its machinery from 15-18 months to 18-21 months. Mini and midi excavators have been the worst affected and will continue to be in 2022.

Low emissions push drives demand

Mat Llewellyn, Managing Director of UK power and lighting specialist MHM Plant, tells *IRN*; "There's been a serious appetite for equipment that reduces or eliminates the consumption of fossil fuel, so solar hybrid generators have been in extremely high demand."

"Power generation, fluid storage and site lighting are all in extreme demand. With Red diesel being scrapped in April that's had a real impact in rental demand and people are seriously focusing on and looking into innovative products to eliminate the consumption of diesel."



Synergy Hire is betting on specialised equipment such as the ZX135US-6-SRF tunnelling machine, bought in anticipation of HS2 works. PHOTO: SYNERGY HIRE UK

"The really big challenge coming on 1 April 2022 is the elimination of the lower HMRC excise duty red diesel used to power excavators to a much higher excise duty and subsequently expensive white diesel. This will inevitably be another unwelcome inflationary shock. However, Synergy's dash-7 Stage V powered machinery is far more fuel efficient and productive than the previous dash-6 models, which mitigates the shock."

Speedy's Russell Down says; "Whilst we seen some supply chain delays on larger equipment, artificial intelligence provides us with dynamic forecasting of product demand and availability, helping us to have the right assets in the right place and at the right time."

Despite hedging its fuel exposure, fuel price fluctuations are a challenge for the company, but one that it is managing. It recently introduced hydrotreated vegetable oil (HVO) across our business as a replacement for red diesel. We've switched from pre-fuelling red diesel to low emission biofuel across our powered access division and a section of our commercial fleet, which has already helped us to save a significant amount of CO₂."

On fuel price fluctuations, Sunbelt's Dave Harris says; "like most businesses we are now passing on modest hire rate increases, and we have moved to a model whereby fuel is supplied on a floating cost-plus basis."

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Trime says solar power is the preferred option by site managers and therefore rental firms.



Lighting tower releases continue to respond to demand for low emission products, with compact, versatile options of particular interest for rental. *IRN* reports.

Lighting the way

Extended run times

Doosan Portable Power's latest release reflects wider market demand for extended run-times. It has launched the LVL 50 Hz portable light tower for the Middle East and Africa markets. Designed for reliability and durability, the tower - also available as a 60 Hz model - is described as "ideal for the rental market." It has a compact footprint job site mobility and easy transport.

"Applications include lighting for special events, road and bridge construction sites and all general construction applications, as well as providing lighting for emergency and disaster relief, oil and gas drilling and for mining and quarrying locations," Doosan Portable Power confirms.

The LVL light tower has a power train based around the Yanmar L48N5 Tier 2 diesel engine, with a high output alternator, offering extended run-time of 220 hours (200 hours for the 60 Hz version).

"The four 300 W LED lights give an output of 1200 W, the same coverage as the last generation metal-halide lighting tower. The durability of the LED lights is also a significant improvement providing up to 50 thousand

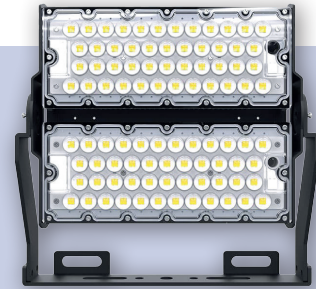
“ The four 300W LED lights give an output of 1200W, the same coverage as the last generation... ”

LED upgrades

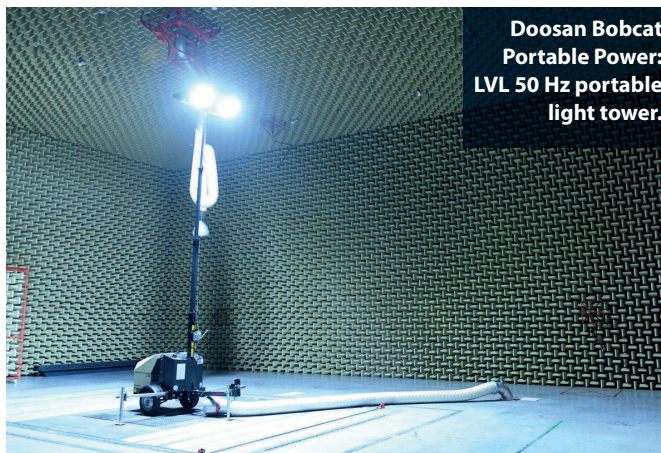
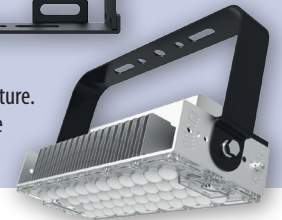
Finland-based TSR Elsite says its attracting demand for its Proled Plus replacement kit to upgrade old light masts, which includes LED flood lights and connectors that make installation easy to any light mast.

The TSR Proled Plus LED flood light kit with up to 152,000 lumen light output and 60° opening angle give lighting to a 3,000 m² area.

It includes 4 pcs 120 W or 4 pcs 240W LED flood lights with 5000K colour temperature. Flood lights include Philips Lumiled diodes and Meanwell driver. Also included are Wieland male connectors female connectors to connect lights to any light mast.



TSR Proled Plus LED flood light kit.



Doosan Bobcat Portable Power: LVL 50 Hz portable light tower.

hours of lifetime. This means that the LVL can be kept running for much longer and at a lower overall cost."

"Whether it is the forklift capability, single-point lifting, or towing eye, the user has the benefit of many options for moving the unit. Repositioning the light is very simple, thanks to the 7-metre (23 ft) telescopic extension and full 360-degree rotation.

The new vertical mast also allows more units to fit into a standard 40-foot shipping

container. Set up simply requires the draw bar to be dropped down, the fuel tank to be filled and the unit to be started.

Also "rental ready" are Generac Mobile's CUBE PRO and V20 PRO which launched just over a year ago. Described as "plug-in hybrid" lighting towers, they allow the user to select the type of power supply of the machine, offering a "3 in 1" model that is either: 100% electric (powered only by the built-in battery pack); Stage V Diesel engine (powered only by the built-in generator); or a hybrid system (powered by automatically alternated generator/battery cycles).

Trailer mounted option

The latest of Canada-based Lind Equipment's Beacon LED Light Towers is a trailer mounted unit. It has key features of the Beacon LED Tower - full brightness, uses only 200W per light head, IP65 weatherproof rating, durable and versatile - plus a built-in mounted trailer, allowing workers to pull the tower around the jobsite from the back of any vehicle.

The tower can be used as a generator powered light tower, an electric powered light tower and as a diffused no-glare light tower. It now has "the added capacity of working on construction sites that require a tow-behind light tower."

Canada-based offices in the US and a presence in the UK, Finland, Spain and France.



Trailer mounted unit from Lind.

The PRO lighting towers have two power sockets (Multipin and CEE), further extending the multiple use concept to connect to a Generac new Solar Kit (via Multipin socket). This option allows to use the unit in Hybrid Solar mode or a new Battery Pack (via CEE socket) which allows the unit to be used in extended electric mode.

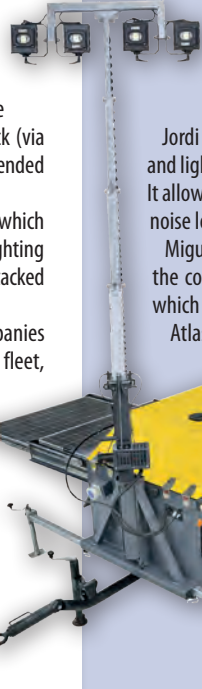
The Solar Kit has 3 x 330 W photovoltaic panels, which can recharge the batteries integrated in the PRO lighting tower during the day. The panels can be tilted and stacked using sliding guides for transport and storage.

Generac says "the PRO models allow rental companies to choose a single lighting tower model for their fleet, meeting requirements of the new World Green Deal and meeting a range of customer needs without having to diversify their fleet and increasing the speed of return on investment and ease of fleet management."

Aiming for zero

The Trime Group is continuing to make what it describes as "substantial investments" in the development of low and emission-free lighting towers under the Trime T-Zero brand.

Three lighting towers in the range attracting



Atlas Copco partnerships

Spanish company Morillo Energy Rent rented four HiLight B5+ light towers from Atlas Copco, which illuminated the sporting stages at Extreme Sports Barcelona in September 2021.

Jordi Casas, Project Manager Events at Morillo Energy Rent, said the light towers were selected for their versatility and light coverage. "We connected four HiLight B5+ to the power grid, which became a very sustainable solution. It allowed us to minimise environmental impact, reducing carbon footprint, NOx and CO₂ emissions and, of course, noise levels."

Miguel Ángel Artiel, Technical Director at Morillo Energy Rent, said the model's compact dimensions allowed the company to minimise transportation costs installation times. "They also come with start-stop function, which is great for applications that do not need a light source all the time," he said.

Atlas Copco has worked with Morillo since 2016, when it acquired a set of HiLight B5+ light towers. Morillo's B5+ fleet has since grown to 23, as well as three QAS5 power generators from Atlas Copco.

Meanwhile Atlas Copco's Power and Flow division recently sold 30 units of solar-powered LED light tower, the HiLight S2+, to Dayim Equipment Rental Co in Saudi Arabia. The innovative S2+ light tower is efficient and delivers high performance, giving workers good visibility while allowing sites to increase sustainability and comply with zero CO₂ emission and noise regulations.

Atlas Copco's HiLight B5+ is designed to reduce carbon footprint, NOx and CO₂ emissions, as well as noise levels. It features compact dimensions for easy transport.



The HBOX+ from Himoina is designed for simplicity, safety, low operating costs and easy connectivity.

“ The PRO models allow rental companies to choose a single lighting tower model for their fleet. ”

demand are the X- Eco Hybrid Lithium, and the award winning X- Solar Hybrid, alongside the X-Solar - an emission and noise-free solar only lighting tower.

Powered by lithium battery technology, the X- Eco Hybrid Lithium can be fully recharged in less than two hours; in a ten-hour cycle, for 80% of operation, the light is powered solely by its batteries and emits zero noise and zero carbon emissions.

Trime says solar power is becoming the preferred option by site managers, driving demand from rental firms for fossil-fuel free machinery, and therefore for the two solar powered lighting towers, the X-Solar Hybrid and X-Solar.

The former is powered by a combination of solar and engine power and will run for 3,000 hours before refuelling is needed, at which point it uses 0.55 litres of fuel per hour. The X-Solar sets are powered by solar panels that the company says make them emission and noise free.

The new products feature a nine-metre vertical mast and LED lamps designed to target worldwide rental markets.

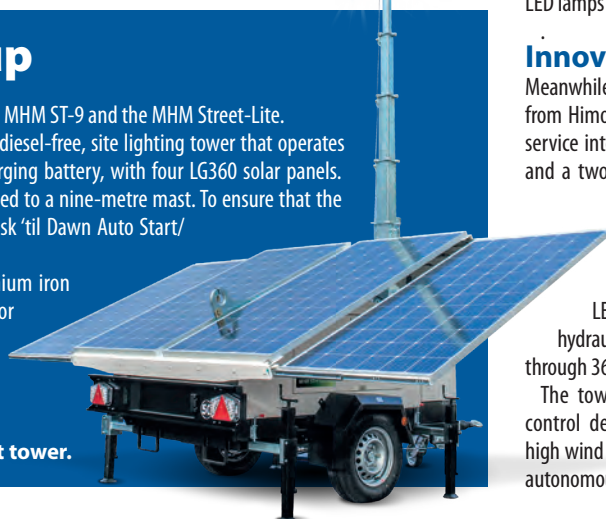
Simple use and set-up

The UK's MHM sells emission-free lighting sets include the MHM ST-9 and the MHM Street-Lite.

The ST-9 is the larger of the two units, a solar/battery, diesel-free, site lighting tower that operates from a combination of an AGM sealed lead acid self-charging battery, with four LG360 solar panels. Illumination is via a bank of energy-saving LED lamps fitted to a nine-metre mast. To ensure that the lights only operate when necessary, the ST-9 is has a 'Dusk 'til Dawn Auto Start/ Stop Sensor'.

Designed for simple use and set up, it features a Lithium iron phosphate battery "and has no complicated wiring or fixings." It is also fitted with an automatic movement sensor that dims light when no movement is detected, and increases coverage when motion is detected.

The MHM ST-9 emissions free light tower.



Innovative connectivity

Meanwhile, targeted at the European market, the HBOX+ from Himoina features long running time and 600-hour service intervals. It has "innovative connectivity features" and a two-cylinder stage V Yanmar engine designed to ensure "competitive fuel consumption levels."

"With a light capacity of 210,000 lumens, the HBOX+ incorporates 4 x 350 W LED spotlights (50X50 SMD Chip Technology). Its hydraulic mast reaches a height of 8.3 m and can rotate through 360°, thus guaranteeing optimum light coverage."

The tower also features a SafetyMast, an electronic control device that can detect obstacles, impacts and high wind speeds and can regulate the height of the mast autonomously depending on the strength of the wind.

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Portable tower

UK company NightSearcher offers the portable Tower Pro 5K, a rechargeable, battery powered floodlight that is simple to set up for inspection work, DIY and construction in both indoor and outdoor applications.

Weighing just 4.5 kg and collapsible down to a 0.9 m length, the Tower Pro uses light heads that are rotational and provide a 360° wide illumination and 90m beam. The light offers three light levels: 500-5000lm and runs from one hour (high) to five hours (low). A choice of warm and cool light outputs is also available, accessed via a switch and brightness control panel.

The floodlight can be plugged into a mains socket for a continuous operation or run on a built-in rechargeable battery. It features removable stability spikes for uneven ground, extends to 2m, collapses to 0.9m and is supplied in a carry bag for transportation.

The Nightsearcher Tower Pro includes removable stability spikes.
PHOTO: NIGHTSEARCHER



Green leadership

Sunbelt Rentals UK has over 4,000 light towers, which it describes as “the UK’s largest fleet of tower lights.”

“We have invested over £20 million in sustainable lighting in the past 18 months,” a company spokesperson confirmed. “This is largely with Trime but also with Generac, to offer a fleet that can make a significant, positive impact on the environment.”

The HBOX+ also has LED Dimming Control, while the CET8 controller includes automatic working mode (start/stop), engine Run/Stop, mast Up/Down and lamps On/Off, as well as a reverse mode when the stop is activated.

Other features include wide doors on all sides and on the roof, with a removable frame for cleaning and maintenance, while the interior contains emergency LED lights in case the equipment is switched off.

The tower is also designed to withstand wind speeds of 110 Km/h or more and to facilitate transport, it features a lifting hook at the top and mounting points on all four sides of the frame for forklifts. Up to 22 units can be transported in a 13 m mega-trailer truck and 20 units in a 40’ container.

Battery innovation

Bruno’s offering includes LED lighting

Sunbelt Rentals.



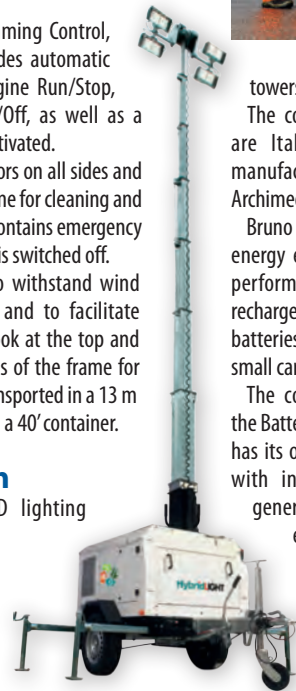
towers, energy storage systems and hybrid generators. The company says an important feature of its offer are Italian made lithium batteries (LINMC type) manufactured by the Bruno Group’s battery specialist Archimede Energia.

Bruno says of the batteries that they “stand out for high energy efficiency and longer life cycle with a constant performance over the time, faster and less frequent recharge for a higher productivity compared to traditional batteries. They do not require maintenance and have a small carbon footprint.”

The company’s R&D Department has also produced the Battery Management System (BMS) Hermes M3, which has its own software to allow batteries to communicate with inverters, solar chargers, permanent magnet generators “for a very high level of integration and efficiency.”

The batteries can be recharged from the mains as well as from the integrated generator. **IRN**

Bruno’s LED lighting tower, featuring lithium batteries.



“ The tower is also designed to withstand wind speeds of 110 km/h or more. ”

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Widening landscape

The XCMG King series has just been officially launched.



JLG's 860SJ HC3, bought by Rehm Arbeitsbühnen.

One of the key discussion points in the access industry in recent times has been Chinese manufacturers and their expansion into the mature markets of North America and Europe, thus potentially creating major competition for the established OEMs in those continents.

In January, XCMG announced the launch of its access equipment in Europe and has appointed two European access veterans – Hans Aarse and Edwin Van der Laar – to spearhead its operation.

XCMG is now delivering large volumes of scissors and booms to Europe, with stock available from the end of January at a warehouse close to XCMG's European HQ in Krefeld, Germany.

The CE marked machines will comprise scissor lifts from 6 m to 18 m working height, including slab and rough terrain models, and eight self-propelled booms up to 28 metres.

The move into Europe coincides with XCMG's international launch of its new Smart Cloud King series range of boom lifts.

Designed to be 'smarter, safer and larger' the new generation boom line is an upgrade of the manufacturer's XG series product line and features increased energy-saving capabilities.

The launch of the K series follows XCMG's release of its 58.6m working height telescopic boom lift and the introduction of its first lithium battery-powered telescopic boom lift, both in October 2021.

Another generalist manufacturer LGMG has also been growing its presence in Europe, as well as North America, through its subsidiaries there, while Chinese MEWP specialist Sinoboom has also created subsidiaries in those two continents.

In Europe, Sinoboom BV recently signed a new partnership with parts specialist TVH (and owner of Mateco) to provide spare parts supply and service for Sinoboom across Europe.

The partnership was active from late last year, and does

Chinese manufacturers of access equipment are making themselves increasingly known on the international scene, while the industry continues its move to greater capacities and electric options. *AI's Euan Youdale reports.*

not cover warranty, which will still be handled by Sinoboom.

Providing a clear indication of its global ambitions China-based specialist Dingli has completed the construction of a new \$235 million (CNY1.5 billion) factory, in its home country, for the production of its boom lifts.

It represents the completion of the fourth phase in Dingli's 'Future Factory' expansion project and enables the production of an articulated or telescopic boom lift every 30 minutes.

Dual capacities

An international trend in telescopic boom lifts has been the move towards higher capacities, with dual capacity models taking off in recent years. This is partly due to the stipulations of the new US ANSI standards, but also thanks to a greater requirement for capacity generally.

The Skyjack SJ66 T+ features dual platform capacities up to 300kg or 454kg.



In 2020, JLG launched the high capacity 860SJ and 660SJ HC3 telescopic boom lifts. And in August 2021, German rental company Rehm Arbeitsbühnen took delivery of one of the first 860SJ HC3 units to be produced.

Over the past year, Skyjack has made a number of improvements to its SJ45 T and SJ66 T telescopic boom lifts, the biggest being to its control system, powertrain and platform capacities.

The SJ45 T+ and SJ66 T+ now both feature dual platform capacities up to 300kg or 454kg. Increasing the platform capacities from the previous single 227kg, allows for more personnel, tools, and material in the platform.

Fellow Chinese manufacturer LGMG has also been expanding its high-capacity range with a large platform telescopic boom lift, this time a diesel-powered unit.

The T22J has a working height of 23.8m, a horizontal outreach of 17.5m, and a 300kg unrestricted and

Zoomlion's 26m working height electric ZT26JE boom.



The 22m working height Snorkel 660SJ.





added rough terrain and electric scissor lift production to its Umbertide, Italy, manufacturing facility. This will reduce delivery times to Europe, Middle East, Africa, Russia and India.

The models already exist in the Genie range and are also produced at its headquarters in Redmond, Washington state, US. They include the GS-2669 RT, GS-3369 RT and GS-4069 RT rough terrain scissor lifts, and the GS-2669 DC, GS-3369 DC and GS-4069 DC all electric lifts.

With growing urbanisation and a demand to reach higher, Skyjack has introduced its largest rough terrain scissor lift to date, the SJ9664 RT. It makes work at seven stories possible without asking customers to jump to a specialised class.

Using an axle-based four-wheel drive system and the company's Smartorque technology, the SJ9664 RT is designed to balance engine horsepower, torque and hydraulic performance.

Electric RTs

As with large boom lifts, electric versions of rough terrain scissors have been making their way into the market too. In recent weeks, Dingli has launched two large compact electric rough terrain scissor lifts to top its range. The 28m and 32m working height JCPT2814DC and JCPT3214DC models are equipped with 80V/520Ah high capacity Lithium battery pack.

Another key feature is their narrow width, of 1.39m, making them suitable for a range of indoor and outdoor work that cannot be reached by more traditional large rough terrain scissor lifts.

Both models provide a maximum load capacity of 600kg for two workers and can drive at full height, and are equipped with four wheel direct electric drive, as well as U-turn and crab steering. Gradeability is 25% and maximum working slope level 1%.

Snorkel's latest electric slab scissor also made its European debut at Platformers' Days in Germany last year.

Launched at Conexpo-Con/Agg 2020, in Las Vegas, US, the S4740E entered full production in North America in January 2021, with European production at Snorkel's manufacturing facility in the UK commencing later in the year.



Pettibone's AS4046E electric scissor lift offers a work height of 14.02 m and platform capacity of 320 kg. It is one of the eight scissors produced by the company, which is better known for its telehandlers.



The TB26EJ Plus is an electric option in Sinoboom's high capacity series.

450kg restricted dual-capacity. It can accommodate three operators with the maximum load.

Last year, Snorkel upgraded its mid-sized boom family, the 400S, 460SJ, 600S, 660SJ and 600S and 660SJ All-Terrain models. Starting at 16.2m working height, they offer a newly designed, globally-compliant jib boom and meet the increasing demand for enhanced lifting capacity.

Mathew Elvin, CEO, Snorkel says, "From a longer-term perspective, we see greater adoption of alternative power sources to diesel, in the telescopic boom sector, as it becomes technically and financially possible."

Concentrating on both capacity and green power sources, Sinoboom launched an electric version of its heavy-capacity range, the TB26EJ Plus at Changsha International Construction Equipment Exhibition (CICEE), in Changsha last year. The unit has a maximum platform capacity of 454kg.

Last year, Zoomlion also launched an electric telescopic boom lift, the 26m working height ZT26JE, with lithium-ion batteries, at CICEE 2021. The company is planning more electric telescopic boom lifts in the future, which will also have li-ion batteries as a power option.

Scissors solutions

There have also been developments in the scissor lift sector to meet new market conditions. One of the major issues since the start of Covid-19 is long lead times, brought about by factory closures by the OEM's and their components suppliers during the pandemic, meaning companies are now in catch up mode as markets recover and customers need new equipment as quickly as possible.

On this point, Genie announced in September that it has



Dingli's electric JCPT3214DC rough terrain scissor.

Genie's GS-3369 is one of the units in production at the manufacturer's Umbertide, Italy, facility.



LGMG's high capacity T22J.

The S4740E is the largest electric slab scissor lift offered by Snorkel, with a maximum working height of 45 ft 5 in (14m), measuring just 47 in (1.19m) wide. Ideal for working in tilt-up warehouse spaces and confined high-rise indoor spaces, the S4740E is the company's first lift to be offered with a choice of either hydraulic or electric drive.

They follow Haulottes launch of its electric rough terrain Pulseo range in 2022. Until then the Pulseo range consisted of the 20m working height HA20 LE Pro electric rough terrain boom lift, which the company is also planning on adding to as its electric offering grows

The new electric big deck, large capacity 15m and 18m working height HS15 E and HS18 E all terrain scissors offer the same drive performance as a diesel machine and are designed to climb slopes up to 45%.

IRN



Haulotte's electric Pulseo RT scissor range has two models.

Access50 Extended

Based on the 2021 edition of the access50, published in the July/August issue of *AI*, the Access50 Extended provides greater insights into the world's largest access equipment rental companies, through a range of breakout charts and analysis, all of which are unique to this supplement.



Several of the major rental companies in Europe and North America have seen small year-on-year falls in the 2021 access50 listing – based on the number of units in their fleets - much in the way they did in the previous 2020 listing.

In the 2021 listing the top four are unchanged since last year, with United Rentals and Sunbelt Rentals taking the top two spots and Loxam and Mateco in third and fourth places, respectively.

It is from fifth place onwards that we see a real change in the top 10, in that it now includes three Chinese companies. Shanghai Horizon, the only Chinese company in the top 10 last year, has jumped from sixth to fourth this year. It has been replaced in sixth position by Zhongneng United, which is new to the list. In 10th place we have Zhejiang Huatie.

Vincent Albasini, CEO of Avesco Rent, talks to Murray Pollok about the recovery of the Swiss rental market and the company's plans for the Baltic States and Finland.

LOOKING AT THE RENTAL BUSINESS IN SWITZERLAND, HOW DIFFICULT A YEAR DID YOU HAVE IN 2021?

For rental in the construction segment, during the first wave, I think the French part of Switzerland was impacted, the German part had no impact, and in some areas we grew. So, we were a little behind 2019, but not a real impact when we compare with France or Italy, for example. The main impact for Avesco was events, because it's a big part of our business [normally around 10 to 15% of the total]. In 2000 events were down 85% or 90%, so that was the main impact.

But in 2021, even the events sector did not really rebound - I think it's around 20, 25% compared to the past. We already invested a lot in different sectors. For example, we developed a lot on containers, for example, for mobile buildings. We can build a temporary school, for example. We compensated for the reduction in events already in 2021. We recovered the 2019 volume of turnover, and a little bit more.

Portable accommodation was previously a very small activity because in Switzerland we have two main players, Containex and Conecta. During the crisis, we decided to develop this activity a little bit more. And the demand was huge. And now it has a big role: we doubled the accommodation turnover between 2020 and 2021.

HOW IMPORTANT IS THE CATERPILLAR EQUIPMENT TO YOUR BUSINESS

It's a big part of the business. But at the same time, it's really amazing

Vincent Albasini joined Avesco Rent in 2012 and was made CEO in 2019.

“ We undertook a real deep analysis of our footprint in events and realized that 45 to 50% of our emissions come from transport. We extended the analysis into a lot of applications, and saw that it really is between 45 and 50%. ”

VINCENT ALBASINI, CEO, Avesco Rent.



This location in Klaipėda, a port city in Lithuania, is one of seven it now has in the three Baltic States.

Baltic

when we grow with a new product, for example containers, at the same time we are growing on the Cat equipment. Finally, we see a balance. We can say that over the last five or six years, the Cat equipment part has been almost the same proportion. And it is interesting: maybe we are more visible with the containers - we are the first ones on the job site - so that helps to keep more deals.

WHAT ABOUT THE FASTRENT EXPERIENCE - THE ALL-DIGITAL BUSINESS. WHAT HAS HAPPENED?

At the beginning for Fast Rent the idea was a separate business with a new brand to be more flexible, to use a full digital approach, with dynamic pricing. So from 2014 to 2019 it was like a startup. We tested a lot and in 2019 we decided we can use the platform. So we have transferred it to the Avesco Rents network.

And now we are using Fast Rent for our work in the do it yourself (DIY) sector, where we have the partnership with Hornbach, like Boels and like Kiloutou in France. We are using Fast Rent in Switzerland for that and as a brand it is only used in the DIY stores.

But the ideas from Fast Rent are now being used by Avesco in Switzerland already, but not in all of the network. We want to move during 2022 to propose a full digital experience for part of the product.

In the Baltics we are already using this approach. We are present in three countries [Estonia, Latvia and Lithuania] with seven branches and we are using the same approach. And now we are thinking about that for Finland.

The Fast Rent approach is not available in all regions in Switzerland, but the goal



opportunity

for the end of 2022 is to have both channels available. We will have two channels: the traditional channel with sales people and a coordinator to manage the request from the customer and to organise the contract. And the second channel is the digital channel, where the customer is able to book the machines and pay online, and see the availability of equipment. That will be available for the whole of Switzerland at the end of 2022.

A CUSTOMER CAN USE DYNAMIC PRICING MODELS WITH AVESCO OR HE CAN GO DOWN THE TRADITIONAL ROUTE WITH A SALESPERSON?

The customer has several propositions. First, as normal, he can have a fixed price so we can sign a framework agreement connected with an account. The system applies directly the fixed price. A second proposition is, OK, sometimes he wants to negotiate with the sales team, for example, or when he really wants to use the dynamic pricing, he can book the machines. It's two different ways.

We have some customers who are not interested in signing a framework agreement. They prefer to see the opportunity on dynamic pricing, because they know that the price changes a little bit. To be honest, that's more for the small and middle-sized customers, because they are very flexible. For key accounts, it's not possible to have dynamic pricing. But it's not a problem because they have their own price condition and they are able to go with the account and book machines.

AND HOW MUCH BUSINESS IS GOING THROUGH THE DIGITAL CHANNEL NOW?

In Switzerland it is very modest at the moment, but in the Baltics we can say 25 to 30% of contracts are made online. And it's interesting because in the Baltic States, we created the company between 2018 and 2019 and we were really the first with the full digital approach. I think it depends really on the culture and habits of the country.

And when you look at the Finland, I think it's the same.

WHAT IS THE POTENTIAL FOR THE HORNBACH DIY STORES?

There are eight stores and we are in all of them. We follow the strategy of Hornbach. And in some regions we are looking maybe to have different partners. At the moment the focus is with Hornbach.

AND YOU ARE ALSO LOOKING AT A FRANCHISE MODEL TO EXPAND IN SOME AREAS OF SWITZERLAND? ONE EXAMPLE IS THE ARRANGEMENT WITH WAELTI SA IN NEUCHÂTEL.

The approach is to have some partners in small regions where it is complicated to open a new branch because the volume of turnover is not enough for us.

It's a little bit different from franchising, because it is our equipment and we outsource the operation to external partners. They manage the equipment, they do the contract, and they are in touch with the customer and with our platform.

GOING BACK TO THE BALTICS. THE ERA VALUES THE MARKET AT €200 MILLION ANNUALLY: DO YOU SEE IT AS A GOOD OPPORTUNITY?

First we had the dealership, so we are trading all the Cat equipment and different brands for the job sites. And for rental it's a very interesting market, with a lot of opportunity for the future, with the big Rail Baltica project supported by the EU in the three countries.

We have opened seven branches over the last three years and we have a greenfield approach. We are not the main player - the leader of the market is really between Ramirent, Cramo and Storent - but we are following our strategy and we want really to be one of the main actors.

They are not huge countries and they are very concentrated in the cities, so we need to be strong in the main cities.

It's a little bit different from Switzerland because it's much more dynamic. I think we want to see double digit growth for the coming years.

In the Baltic States we are much more concentrated on the construction equipment. We are strong in Cat equipment as well as power and temperature control. There is a smaller range of products: the number of product types in Switzerland is 300 and in the Baltic States we are between 80 and 100.



The internal view of one of Avesco's locations in Switzerland.



The 40 tonne electric truck being used for intra-network fleet transport.

Reducing emissions

Avesco Rents is reducing its transport emissions through a joint venture with transport specialist Friderici Spécial, using an electric 40 tonne truck developed by Swiss company Designwerk.

The truck, which has 22 tonne carrying capacity and is based on a Volvo vehicle, is being used for the transport of machines between Avesco's branches in Switzerland.

Vincent Albasini, CEO of Avesco Rent, tells *IRN* the project will allow it to quickly reduce its carbon emissions; "We undertook a real deep analysis of our footprint in events and realised that 45 to 50% of our emissions come from transport. We extended the analysis into a lot of applications, and saw that it really is between 45 and 50%. It's internal transport, not from the branch to the job site. This represents around 8% to 10% of our total carbon footprint for transport. It's really a good option because it's a first step, and not for 1% or 2%, but 10%."

Read the full Q&A on reducing emissions at www.internationalrentalnews.com.



AND WHAT ABOUT FINLAND?

In Finland now we are really working, but I think the Covid situation will delay our project a little bit, but we are really ready to launch our strategy. We will open a little bit [this] year, so we are working now to transfer our knowledge to be present. Finland is really a huge market for rental - the volume of turnover is double Switzerland - so if we can take a little part of the market, I think that will already be a success.

GROWTH THROUGH ACQUISITIONS OR ORGANIC?

We are looking at both. We are in touch with some players and at the same time, we are looking at the greenfield. Sometimes I think greenfield is not a bad approach, when you consider the investment needed to acquire a business, sometimes with very high goodwill.

Caterpillar equipment is an important element of Avesco Rent's business.

HOW AMBITIOUS ARE YOU FOR THAT MARKET?

To be honest, when we look at the Finnish players, they are really strong. But I think we have some advantages in some product categories - not to be the first in the first place, but to be in the top 10 in the next five years.

I think for us, we cover five different countries. We see really a rental group. Our ambition is not to be the first in every country like in Switzerland - because we are strong market leader there - but to be one of the main rental players in Europe. I think this is a really interesting time for our group.

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Rental firms now leading equipment buyers in Europe

Rental companies now buy more construction machines than contractors do in Europe, according to new findings from UK-based market researcher Off-Highway Research.

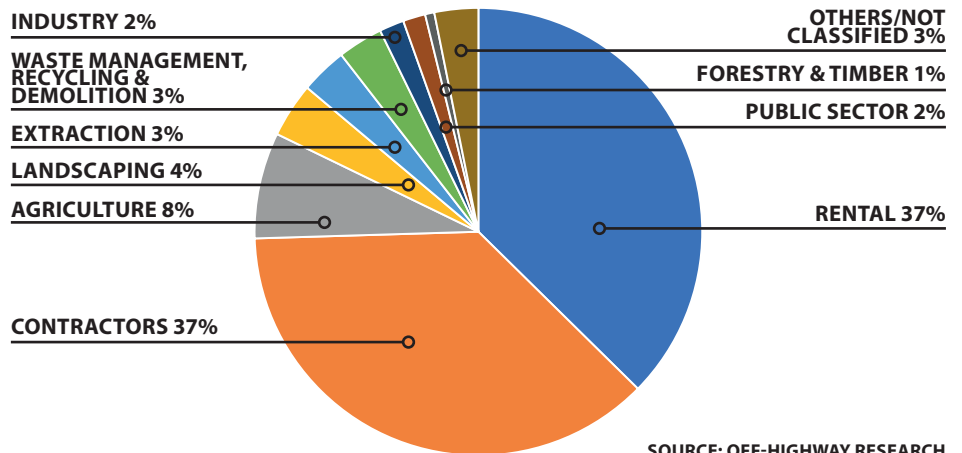
In the last decade, says Off-Highway Research (OHR), equipment rental companies have overtaken contractors as the biggest buyers of construction equipment in Europe, in terms of volume.

Its findings cover 15 key types of construction equipment, including excavators, loaders, telehandlers and larger equipment types such as dozers, graders and dump trucks. (Its figures exclude aerial platforms, which, of course, is a major equipment segment for rental.)

Rental companies bought 37.4% of the construction equipment sold in Europe in 2021. Contractors were the other major group, taking a 37.1% share.

OHR Managing Director, Chris Sleight described this as a “sea change” compared to 10 years ago; “These shifts in buying patterns are very gradual. However, the data puts a figure on what has been known in the industry for many years, that there is a slow shift from contractor-ownership of equipment to rental companies.

CONSTRUCTION EQUIPMENT SALES IN EUROPE BY CUSTOMER GROUP – UNIT TERMS, 2021



SOURCE: OFF-HIGHWAY RESEARCH

“Ten years ago, contractors were still the dominant buyer, accounting for 37% of sales – the same proportion as today – while rental was smaller with a 34% share.”

However, looking at sales in unit terms was “only part of the story,” said Sleight.

He said examining the data in terms of sales value paints a different picture. It shows that the types of equipment bought by rental companies differ from those of other buyers in Europe, with the rental industry focussed on particular machine types, such as mini excavators and telehandlers.

“In value terms, contractors are still by far the most significant equipment buyers. Our estimate is that they

still account for some 42% of the value of equipment sold in Europe, while the proportion sold to rental drops to 28%,” he said.

Long-term shift

For contractors and owner-operators, there was a stronger emphasis on larger excavators, wheeled loaders and larger earthmoving machines.

“That’s not to say that rental companies aren’t interested in these machines too, but for them the dominant machine is the mini excavator.”

On whether the shift towards rental is set to continue; “Yes and no,” he said. “Different countries around Europe have very different profiles in terms of their buyer groups, so if a certain country has a surge in demand, that can move the needle for the region from one year to the next.

“One of the things we see in our forecast is that equipment sales are set to grow most strongly in markets that are still very contractor-focussed. Italy would be the most significant of those.

“That means that in the next few years, the dial will tick back towards contractor sales by a percentage point or two. But longer term, we see a shift to rental to some extent, even in many traditional contractor markets.”

In December, Off-Highway ran a webinar on changes in construction equipment customer groups. To view the webinar, click here: <https://www.youtube.com/watch?v=J5Tq9kFu0Zc&feature=youtu.be>

Off-Highway Research’s analysis is captured by the company’s newly launched Customer Group Database Service. For more information about the service, visit www.offhighwayresearch.com.

Off-Highway Research is a KHL company.



Rental companies focus on smaller machine types, particularly mini-excavators. IMAGE: BOBCAT’S E10E

“These shifts in buying patterns are very gradual. However, the data puts a figure on what has been known in the industry for many years, that there is a slow shift from contractor-ownership of equipment to rental companies.”

CHRIS SLEIGHT, Managing Director, Off-Highway Research.

Off-Highway
RESEARCH

Inviting all awards entries!

The deadline for entries for the 2022 European Rental Awards is Friday 25 February 2022.

The 2021 European Rental Awards in Amsterdam.

PHOTO: MAURICE VINKEN
WWW.KLEURSTOF.EU, COURTESY ERA



The judges

Kari Aulasmaa, CEO, Renta Group
Pierre Boels, ERA President
Soeren Brogaard, CEO, Trackunit
Murray Pollok, Managing Editor, IRN
Armin Rappen, CEO, mateco Holding
 Non-voting Chair: **Michel Petitjean**,
 Secretary General, ERA

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

We encourage rental companies operating in Europe and any supplier selling in Europe to consider entering the awards.

The 2022 awards categories are:

- **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**

Entries can be submitted for all the awards, except for the ERA Technical Committee, which is judged solely by the committee and not on the basis of submissions.

The entry form and judging criteria are available at

www.khl.com/rentalawards

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

For more details on the ERA Convention, visit <https://erarental.org/event/era-convention-2022/> **IRN**

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Actionable insights

Since founding in 2015, Finland headquartered rental company Renta has expanded rapidly into Sweden, Norway, Denmark and Poland, and now operates 103 depots across those markets. A full-service business with specialisms including scaffolding and weather protection structures, it employs over 1,000 staff and annual revenue in 2021 was €280 million.

Chief Information Officer (CIO) Joel Särkkä says Renta is a company whose growth has always been linked to its digital strategy.

"From the get-go we established that digitisation would be one of our core values," he tells *IRN*.

"We've always understood that growth was going to be rapid, and we were going to have to support several different areas; equipment rental, site services, scaffolding and weather protection and site huts. We also understood that geographical growth was going to be fast and that our digital capabilities would need to be easily rolled out to all the countries we're operating in."

The company's most visible digital tool is the customer-facing rental and management app Renta Easy, which is supported by a number of internal apps linked to its core operations.

These include Renta Modules, which houses site modules

Digital tools including the rental and management app Renta Easy are driving business and customer relationships at Nordic company Renta Group.

Belinda Smart **spoke to Renta Group CIO Joel Särkkä.**

design and virtual reality (VR) modelling tools; Renta Pro for scaffolding; Renta Task for site services; Renta Connect, a cloud-based integration platform; Renta Tools for fleet maintenance and equipment downtime elimination; and Renta One, an analytics tool that provides "360 visibility over everything."

Scalability

As its name indicates, Renta Easy is designed to simplify the rental process for customers. It enables users to rent and return machines, view technical data and the availability of machines in various locations, and create lists of frequently used machines. It also harnesses telematics data and displays real-time locations of machines and hours of use, and can be used to view project-specific invoices and order automatically created equipment lists.

From a business perspective, says Särkkä, the key benefit of the apps is flexibility and scalability.

"Everything within Renta Easy – along with all our applications - needs to be locally relevant and accessible, whether that be in terms of dealing with the local tax and finance framework of a country, the local language or local processes along with local standards and local inspection processes.

"We also have other third party service professionals who engage with our application; we have subcontractors who might do work for us in scaffolding or site services - they can mark up the work that they've done and their own through our solution. So, we've ensured that all the different players we have working with us interface with us through digital tools, in this case the Renta Task and Renta Pro ERP apps."

“ So far, we've seen rapid growth in Renta Easy's use. Big and small customers use it for different use cases. We developed it so it works whether you are a large Nordic contractor with several work sites, or you're running a small electrical company and once a month you need a crane or a scissor lift, or if you just need a pressure washer for your deck. ”

JOEL SÄRKKÄ,
Renta Group CIO.



“ From the get-go we established that digitisation would be one of our core values. ”

Savings and sustainability

Renta Group is now largely paperless and, says Särkkä, is able to boost efficiencies through Renta Easy, for example in machine utilisation.

“For example, if a customer has looked at their customer specific pricing or has looked at a machine’s real time utilisation through the app, this means that they haven’t had to contact our depot and that has saved time. The return inspection process is in a digital format through Renta Tools, meaning we can immediately verify the condition of the machine.”

“We want our machines to be used. We want people to have the right machine at the right place. For larger contractors, that’s about management. We sit down with them to see how much their fleet has been used and where. Conversely, a customer involved with building a single house might want to be able to see if their machine hasn’t been used for a week.”

An important indicator of Renta Easy’s success is “how happy people are using the app,” he says.

“So far, we’ve seen rapid growth in Renta Easy’s use. Big and small customers use it for different use cases. We

Renta Easy displays real-time locations and hours of use for machines.



developed it so it works whether you are a large Nordic contractor with several work sites, or you’re running a small electrical company and once a month you need a crane or a scissor lift, or if you just need a pressure washer for your deck.”

Meanwhile, sustainability tends to work in lockstep with digitalisation. One example is efficient equipment usage through higher utilisation, which leads to lower emissions.

“If we can serve a larger customer base with relatively smaller fleet, that means the manufacture of fewer machines. Sustainability and digitalisation are closely intertwined.”

“When it comes to emissions or the carbon footprint of your business, the first step is to understand how much and where the emissions are occurring. This is where digitalisation is so important because you have to have awareness before you start applying mechanisms to deal with it.

“Through Renta Easy, Renta is able to say: ‘If we rent you this machine, these are the emissions’. The first step is to know and understand your emissions, so you can apply actions,” he says.

“Digitalisation also makes you run your operations more efficiently. If you have four units of scissor lifts on your work site and you see that they’re utilised between 10 and 20% of the time, and they’re not used at the same peak hour, and you can return two of those pieces of

machinery to us, that reduces everyone’s carbon footprint.

“We can send those two other machines out to another customer, which brings down overall fuel carbon footprint, because we are able to serve larger customer base with a smaller machine pool.”

Data security

One aspect of sustainability that is growing in importance is data protection, particularly for a fully digitalised company. “Data security keeps every self-respecting CIO awake at night, so this is an area we’re tackling actively,” says Särkkä.

“Luckily, we have the European Rental Association’s initiative to improve cybersecurity standards as a whole and we’re closely tracking that.”

“We are also vigorously auditing ourselves. When you digitalise everything and you’re vocal about digitalising everything, you need to make sure that you have sufficient building blocks in place to make sure you’re doing it securely.

Actionable data

With digitalisation now driving the growth of rental at a sectoral level, Renta Group is aligned to the trend, says Särkkä.

“The big trend in equipment rental is penetration, so how much is rented versus owned, and this is growing towards rental. This is where telematics and apps like Renta Easy come in, because of the transparency they offer. Digitalisation is about bringing transparency to customers.”

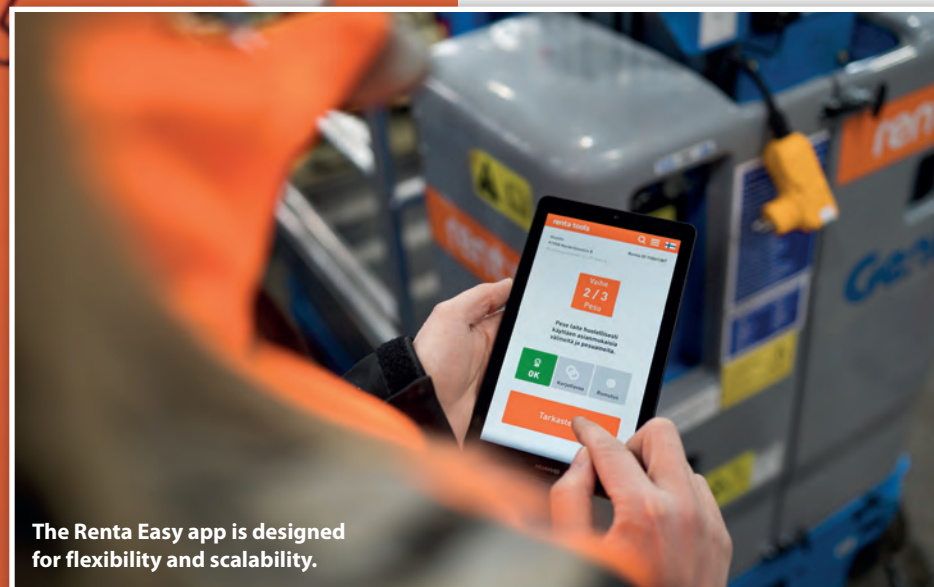
In the near term, he says Renta’s focus for 2022 and 2023 will be to expand and enrich that transparency.

“A key benefit of actionable data is to have full 360 visibility in our fleet performance, where we have digitalised our machinery service and repair processes. We have better insight to machinery health when we understand the whole life cycle of the machine.

“That’s really an area where it’s not just enough for us to say, ‘Here is the data, go and look at it’. The discussion over the next months is about how can we make this even more available and accessible, whether that’s for 2000 or two people, to give businesses transparency and power over their operations.

“These are just the first steps. Who knows what else customers might want to see in future? The far reaching future is full of unknowns for us, and the content for that is determined by our business. I’m sure being transparent with basic data such as pricing and CO₂ emissions will open doors in the future in ways that we don’t even know exist yet.”

IRN



The Renta Easy app is designed for flexibility and scalability.

ERA Equipment CO₂ Calculator version 2.0

The European Rental Association is working on the release of a more comprehensive and easier to use Equipment CO₂ Calculator, offering expanded scope and functionality.



Following the successful launch and subsequent update of the ERA Equipment CO₂ Calculator in 2021, and, based on extensive feedback from ERA members and other equipment stakeholders, ERA has started working on a version 2.0 of the Calculator.

The new version of the Calculator will include an expanded scope, enhanced functionality and improved navigation to provide a more comprehensive, easier to use and more practical tool for equipment stakeholders, including rental companies, contractors, OEMs, public authorities and other equipment users.

3 Calculators in 1:

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

Single and group calculations:

The new version of the Calculator will retain the current calculation of the carbon footprint of a single piece of equipment in a specific use scenario, which will be expanded to include handheld tools and modular space, as well as the comparison function. In addition to this, version 2.0 will enable users to group calculations for a specific project, task or jobsite, or calculate the carbon footprint of an entire equipment fleet. Users will be able to group all categories of equipment into a single calculation and, to make it simpler and easier to use, it will be possible to input the data in bulk from a standard template. The results will show the total carbon footprint for all the equipment, with a

breakdown of the impact of equipment from different categories.

Improved navigation:

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

Version 2.0 of the ERA Equipment CO₂ Calculator will remain an independent and free-to-use tool for all equipment stakeholders to make more sustainable choices when using equipment. It is expected to be released in May 2022 and will be presented at the ERA Convention on 15 and 16 June in Riga, Latvia, which will address the topic of decarbonisation and sustainability as part of rental in transition.

The ERA Equipment CO₂ Calculator was first released in January 2021 and enabled equipment stakeholders to determine the carbon footprint of construction equipment over its entire lifecycle, with the results providing an estimate of the CO₂e emissions per hour of use. It was updated in March 2021 to enable comparisons between different user scenarios and include alternative fuel choices.

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

Try the current version of the Calculator here: <https://equipmentcalculator.org/en>

For more information about the ERA Equipment CO₂ Calculator, please contact the ERA Secretariat at era@erarental.org

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About the ERA

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

Extensive information on the ERA's activities, reports and publications is available at www.erarental.org

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