

INTERNATIONAL

rental

NEWS

SEPTEMBER-OCTOBER 2023
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A KHL Group Publication

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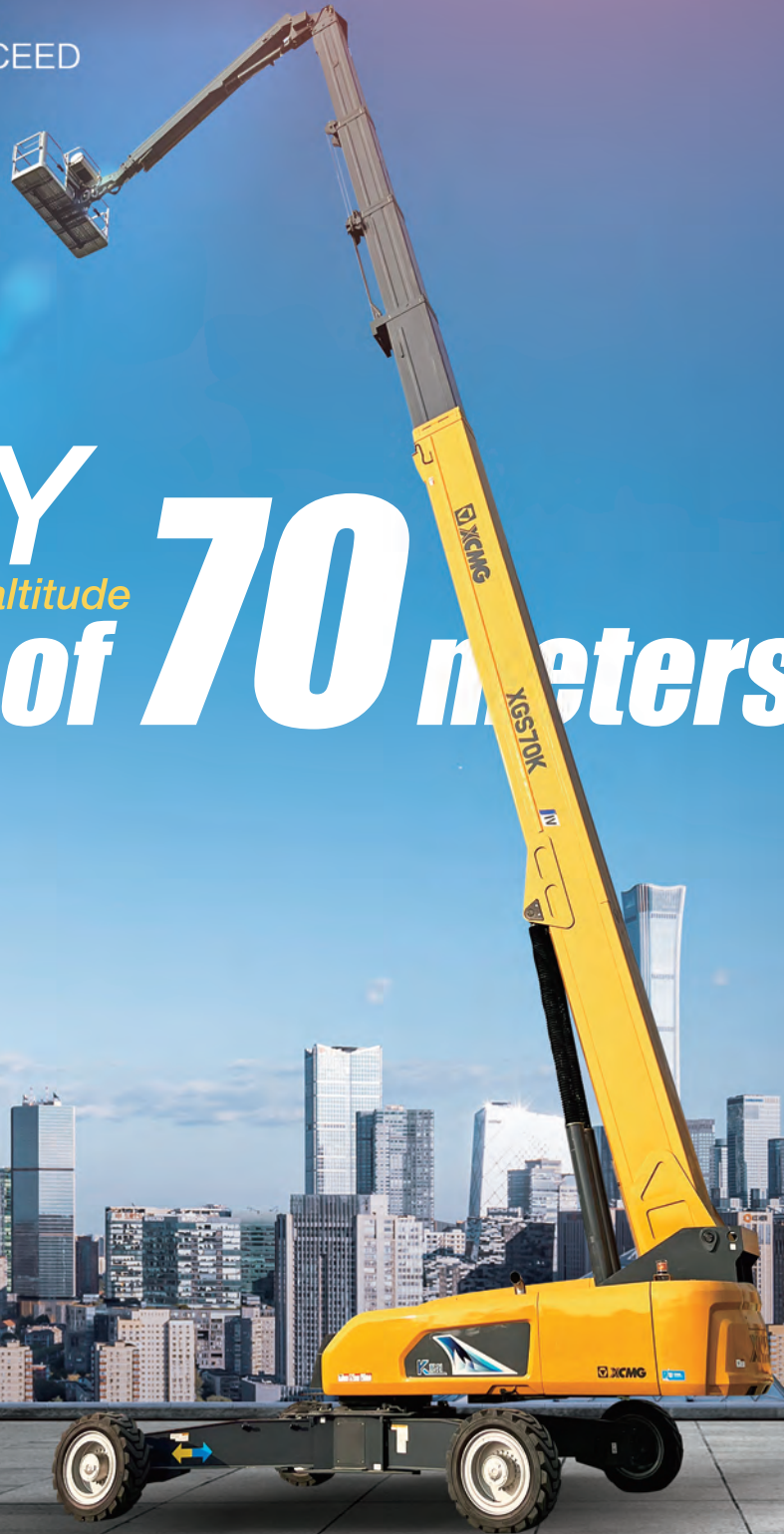
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Future focus

As we enter the final months of 2023, the focus for many companies will inevitably start to shift towards activities and outlooks for next year (if they haven't already), as well as reflection on what has been a mixed year.

While some regions have seen confidence improve, others are faced with downturns as a result of a drop in activity levels. A recent report from German construction industry body Bauindustrie found that turnover among construction companies with 20 employees or more in Germany fell by 7.3% in real terms year on year in the January-May 2023 period. Our report on Germany in this issue looks at the German construction and equipment markets and predicts what the future could hold for both.

Of course, one subject that is impacting many in the rental industry is the issue of attracting and retaining talent to the sector. While there is no quick fix for this, companies are working to fill the gap.

For example, *IRN's* Lucy Barnard recently spoke with Emma Porter, managing director of UK-based Story Contracting, one of many companies that are introducing Diversity & Inclusion programmes.

That conversation is featured in this issue, with Porter revealing how the company has changed to become a more welcoming workplace. The feature also paints a fascinating picture as to the Diversity and Inclusion statistics of the wider industry.

On the topic of people in rental, the first ever European Rental Week kicks off on October 9, with the theme of 'Investing in People' set to dominate. You will find all the information on the event on page 17.

Finally, I am delighted to say that *KHL Group* is launching *Rental Briefing*, a daily newsletter for the rental sector that will provide analysis, commentary and insight into key topics in rental.

I am excited to be working alongside Jenny Lescohier, editor of *Rental Briefing*, who brings plenty of experience and knowledge of the industry to the role. To register your interest in contributing editorial for the newsletter, Jenny can be contacted by e-mail: jenny.lescohier@khl.com.

I hope you enjoy the issue.

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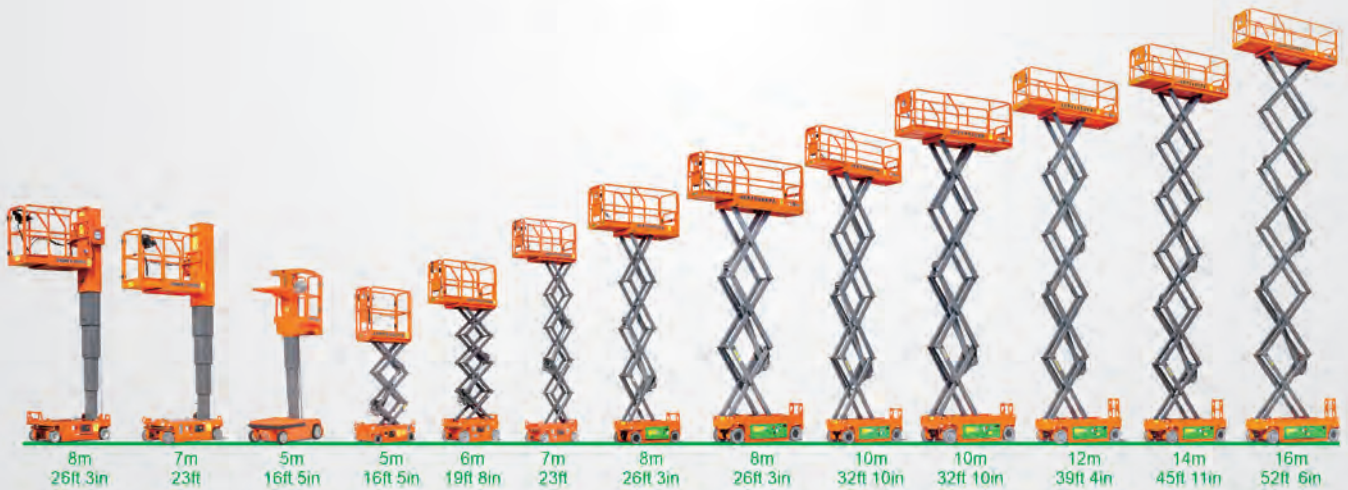
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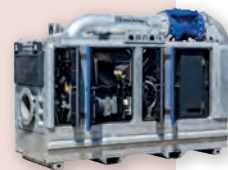


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IRN's interview with Case Construction's *Graziano Cassinelli* at its UK roadshow can be found on page 46.





PHOTO: VOLVO CE

Volvo CE's 600V power unit, for charging heavy battery-electric equipment

Volvo CE unveils mobile charging unit

Volvo Construction Equipment has launched a mobile power unit designed to provide flexible and sustainable power to remote locations with limited grid access.

The unit is designed to deliver reliable, efficient, and rapid charging for electric construction machines.

The 600V unit, tailored for larger machines, is designed for use in locations where grid access is weak or limited on-site; customers can charge the power unit elsewhere, then transport it to the site.

It also offers power peak shaving, which involves continuous low-power charging of the batteries in the power unit or high-power fast charging for construction equipment.

The unit can be configured with new or second-life battery packs, such as those previously used in other Volvo products.

Elodie Guyot, head of Volvo CE's electromobility sales for Europe, said, "Electric machines are one part of the puzzle when it comes to establishing fully fossil-free worksites – another is reliable charging solutions.

"Our power unit is the next step in our ambition to decarbonise the construction industry, helping customers comply with environmental regulations while ensuring the steady and efficient supply of power they need to get the job done."

Daily newsletter for rental sector launched by KHL

Rental BRIEFING

GLOBAL RENTAL INSIGHT - EVERY DAY

In October, *International Rental News (IRN)* and *KHL Group* will launch a new daily newsletter, *Rental Briefing*, covering the global equipment rental sector.

The newsletter will provide analysis, insight and commentary on the rental industry every day, covering topics including:

- Trends in equipment and technology
- Economic forecasts/analysis for rental
- Interviews/profiles with rental professionals

- The energy transition and new power technologies
- Fleet management best practices
- Specialist rental sectors, including aerial platforms
- Trends in rental metrics
- Safety and liability issues

Rental Briefing will be edited by experienced rental industry journalist Jenny Lescohier, supported by KHL's rental and access editorial team, comprising Murray Pollok, Lindsey Anderson, Euan Youdale and Lewis Tyler. Murray Pollok, managing editor

of *IRN*, said; "The equipment rental industry is growing in scale and importance, and is facing some major challenges and opportunities, including the shift to electric equipment, digitalisation, and its role in the circular economy.

"*Rental Briefing* will provide a valuable daily service to the industry, speaking to industry leaders, reporting on product trends, and highlighting some of the best practices being adopted by rental businesses around the world."

If you have a story to tell, or would like to contribute editorial information for the newsletter, please contact Jenny Lescohier by e-mail: jenny.lescohier@khl.com

Ashtead opening 100 new depots a year in North America



Ashtead Group is on course to expand its Sunbelt depot network in North America to 1,234 locations by April 2024.

The company plans to add more than 298 locations through organic growth and acquisitions between April 2021 and April 2024 as part of its Sunbelt 3.0 plan.

It added 40 new sites in the first quarter of its financial year to 31 July, of which 16 were through acquisitions.

Ashtead said there was "clear momentum" in the North American market, backed by the large number

of mega projects and legislative acts in the US.

The plans were revealed upon the release of the company's latest financial results, with US revenue for the first quarter up by 22% to US\$2.3 billion, while Canada saw an increase of 21% to C\$213 million.

In contrast, there was a 2% decline

in overall revenue to £178 million for Sunbelt Rentals UK, although rental revenue saw a slight increase of 1% to £150 million. The full-year guidance on growth for the UK business has been reduced to 6% to 9%, from the previous range of 10% to 13%.

Ashtead CEO Brendan Horgan Horgan said that the company is in a "position of strength" to capitalise on opportunities arising from favourable market conditions in North America. On the UK, he said that despite some softening the company expects overall performance to be in line with expectations."

IN BRIEF

■ **SmartEquip** has released a new version of its e-commerce platform to allow equipment dealers, fleet owners and distributors to set up a branded, digital parts shop quickly and easily.

■ **Sunbelt Rentals UK and Ireland** has invested more than £1.2 million on eco-friendly welfare vans in the last year, the company has announced.

■ **Loxam** has reported a 6% increase in revenues to €642 million for the second quarter of 2023, with strong performance in France and its rest of the world division aiding the growth.

■ **Fluor Corporation** has sold its Stork business to German engineering company Bilfinger. The purchase price of the transaction has not been revealed.

■ **LiuGong** has launched a new 21 tonne electric wheeled loader into the European market. Powered by a 423kWh large capacity lithium iron phosphate battery from CATL, the 856HE is said to be the first fully electric wheeled loader available in Europe.



Holland Lift falls into liquidation

Holland Lift has gone into liquidation and has ceased all its activities.

In a statement, Holland Lift said, "After careful consideration, Holland Lift International B.V. and its shareholder, have resolved to terminate the activities and to proceed with the liquidation of the company."

Holland Lift International employs around 70 people in the Netherlands, and Germany through Servi-Tec GmbH.

The company said that it had faced several challenges in recent years, such as the increase of steel prices, increasing overall running costs and supply chain issues following the pandemic, along with the war in Ukraine. Holland Lift also noted competition from "low price newcomers".

"Despite a staff reorganisation [in 2021], and heavy investments, which resulted in the launch of new designs and products and other measures," added the company, "It proved not to be feasible to ensure long term viability for the company."

DIARY DATES

APEX ASIA

24 - 27 October 2023
Shanghai, China

IRC

23 October 2023
Shanghai, China

IAPA

13 - 14 March 2024
Copenhagen, Denmark

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

Ramirent signs telematics deal with Taggr

Ramirent is partnering with telematics specialist Taggr to monitor thousands of its rental assets in Sweden.

The agreement will see Ramirent – which is owned by Loxam – deploy the technology throughout Sweden.

The company's tag enables companies to track the use, location and carbon emissions of its assets.

Describing the partnership as a "significant advancement for the European construction equipment market", Taggr said the technology will facilitate efficient rental processes.

While currently available only in Sweden, Taggr told *IRN* that both parties had ambitions to extend the agreement to other countries and the

rest of Ramirent and Loxam.

Andreas Eriksson, CEO of Taggr, said the agreement comes after two years of both companies dedicating "significant resources and effort to ensure the final product can truly transform the industry."

Eriksson, who has a background in telecommunications and IT with companies including Netcore and Zenterio, said, "Together, we aim to revolutionise the equipment industry by providing access to information in a unique way. This is essential for each asset owner's journey towards a sustainable portfolio."

"Our partnership not only aids in compliance with upcoming CSRD



PHOTO: ADOBE STOCK

Taggr said the technology will facilitate efficient rental processes.

requirements [the EU's Corporate Sustainability Reporting Directive] but also aligns perfectly with the broader objective of achieving net-zero goals. We're proud to be at the forefront of this change."

CES Power enters Europe with acquisition

CES Power has acquired Irish company Euro Touring Power (ETP), a provider of power and air conditioning equipment.

ETP rents transformers, cables, distribution boxes, and stage air conditioning to large shows, events, sports, and corporate productions

throughout Europe. ETP's managing director Vincent Campion and the management team will remain ETP. This acquisition gives CES Power its first base outside of North America and access to all of Europe. CES has also created a new division, CES Global, which will head

the company's plan to become a global supplier of mobile power, distribution and temperature control services.

Greg Landa, CEO of CES, said, "Expanding overseas has always been part of our business plan, and we are excited to gain a strong foothold in Europe with the addition of ETP, an experienced partner with a reputation for quality equipment and superior service."

"We expect to work closely with Vincent and his team to build our customer base and add exciting new products as we grow the CES brand in Europe."

CES Power rents power and temperature control equipment to the live events sector.



PHOTO: CES WEBSITE

■ **Zeppelin Group** has boosted its Zeppelin Rental business with the acquisition of Bauhof Service GmbH in Stuttgart.

■ **United Rentals** saw record results across the board in the second quarter of 2023, reporting total revenues up 28% year-on-year to \$3.554 billion and rental revenues 21.1% higher at \$2.981 billion.

■ Seven equipment rental businesses have joined forces to establish the **Belgian Equipment Rental Association (BERA)**.

■ **Kiloutou** has acquired German access rental company UKA+HAUKE Arbeitsbühnen. The company rents aerial platforms and telehandlers from four locations in central Germany.

■ In September, **LGMG** welcomed over 1,000 access industry professionals from 60 countries to celebrate the opening of its new factory in Jinan.

■ **Aggreko** has made a multi-million dollar investment in a fleet of Uninterruptible Power Supply (UPS) systems that it will pair with its temporary power generators



Renta Group posts 16% revenue increase

Renta Group has posted “strong financial and operational performance across the Group” for the second quarter of 2023, with revenue hitting €110 million and EBITDA increasing by 11.3% to €38 million. The company said its revenues, which represents a 16.7% increase on the same period in 2022, was mostly driven by acquisitions it completed in the last year.

Sweden remains its biggest market with revenues of €43 million in Q2, followed by Finland (€26 million) and Norway (€23 million).

In terms of growth, Denmark saw the highest increase and generated revenues of €11.7 million, 11% of the company’s total revenue.

US-based EquipmentShare is to open a new 11.6-acre facility in Trotwood, Ohio, as part of a planned expansion into the Dayton region.

The total investment in equipment and property improvements of the new site, its third to open in the state, is projected to be more than \$20 million, according to the company.

IMAGE: EQUIP SHARE



IRN RENTAL SHARE INDEX

COMPANY		19/7/23	22/9/23	CHANGE (%)
Ashtead Group	UK£	54.8	50.9	-7.0%
Emeco	A\$	0.71	0.62	-12.0%
H&E Equipment	US\$	47.67	42.21	-11.5%
HSS Hire	US\$	0.15	0.13	-16.0%
GAM Alquiler	€	1.42	1.32	-7.0%
Herc Rentals	US\$	147.80	120.01	-18.8%
Kanamoto	Yen	2323	2618	+12.7%
Nishio Rent All	Yen	3450	3525	+2.2%
Speedy Hire	UK£	0.37	0.34	-8.1%
United Rentals	US\$	464.50	433.29	-6.7%
VP PLC	UK£	5.80	5.22	-10.0%
WillScot	US\$	48.20	41.73	-13.4%
IRN Index		992.9	938.7	-5.5%

Coates creates power and HVAC business

Coates is launching a specialist power and heating, ventilation and cooling (HVAC) services business in Australia.

Coates Power & HVAC will offer end-to-end turnkey solutions across Australia, where it will open its first hubs in Sydney, Melbourne, Adelaide, Perth and Brisbane. Regional branches will work with these hubs to offer a complete end-to-end solution.

These include logistics & installation, system design, commissioning, maintenance & monitoring, air compressors & quality air equipment, power generation equipment,

power distribution equipment and demobilisation of equipment from site upon completion of the job.

Coates said it is expecting “significant interest” in its regional branches, where its network and teams of plant maintenance people can “provide local support to Power & HVAC systems.”

Coates said the business will help keep an organisation’s operations running and is ideal for use in industrial, engineering, mining, oil & gas and manufacturing environments.

Coates CEO Murray Vitlich said the launch will play a key part in Coates



becoming the “market leader in safe, smart and sustainable equipment solutions.” Vitlich said, “The launch of Coates Power & HVAC is another key pillar in achieving that vision and ensures we can provide solutions to a broad brush of sectors and use cases across the country.”

Atlas Copco to buy Australian pump manufacturer

Seven Group Holdings is to sell its pump manufacturing business Sykes Group Pty Ltd to Atlas Copco. Sykes will become part of the Power and Flow Division within Atlas Copco’s Power Technique division, and the brand name will be retained.

The purchase price was not disclosed and at the time of writing Seven Group had not released any details on the sale.

Based in Newcastle, New South Wales, Sykes makes dewatering pumps for

mining and wastewater applications. It employs 123 people globally and has annual revenues of approximately A\$65 million (€38.2 million).

Its main focus is surface dewatering pumps, including chopper and cutter technologies for wastewater applications, and it also has a line of hydraulic submersible pumps.



PHOTO: ATLAS COPCO

A Sykes surface pump.

Sykes has manufacturing, service and assembly facilities in Newcastle (Australia), Dubai (UAE), and Charlotte (USA), with sales and service employees globally. It also sells through distributors worldwide.

“Sykes’ products are well known in the industry as high-quality, heavy-duty products for harsh and demanding environments,” said Andrew Walker, Business Area President Power Technique.

“They manufacture products that complement our current offering well, making it a great fit for us.” Sykes Group was a sister company to rental company Coates, which is also owned by Seven Group Holdings. Seven Group also owns lighting tower manufacturer Allight.

PEOPLE NEWS

■ **Neil Stothard** has retired as CEO of **VP plc** after a 26 year career with the business. He has been replaced by former CFO, **Anna Bielby**.

■ US rental company **Equipment Depot** has appointed **Anthony Garcia** as president. Garcia succeeds President and CEO David Turner, who announced his departure after 12 years at the helm.

■ **United Rentals** has announced that its executive vice president and chief operating officer (COO) **Dale Asplund** is to step down from his role this year.

■ **Volvo Construction Equipment (Volvo CE)** has announced the appointment of **Joakim Arndorw** as head of sales, Region International.

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IRN columnist Andy Wright, CEO of Sunbelt Rentals UK, continues his 'lessons learned' theme by discussing how to create a winning team and 'system of play'

In my last article, I focused on some of the important lessons that I have learnt from a lifetime career in rental. The key messages were that a) you get the people and teams that you, as a leader, deserve and b) the consistency of words and actions is critical in building trust between employees and leadership.

In this second article on lessons learnt, I'd like to continue with the people related theme and look at some key learnings around how to build a winning rental team.

Best players on pitch

One of the most important things I have learnt over the years has been that in general, winning teams have the best players playing for them. Now this may seem obvious to many but this concept of getting the best players on the pitch doesn't always seem to be evident in many businesses that I encounter.

This is particularly relevant now, whilst we are in this war for talent, and our ability to attract great people to the team is hampered by our ability to be seen as an interesting industry to work within or one that has exciting roles to be able to offer to people, roles that engage and align to their core values and aspirations.

Too often I see people filling roles with people that aren't suitable just because of the difficulties in finding the right talent in a sensible timeframe. Having a 'body' in situ for the sake of it is not acceptable nor will it contribute to building a winning team in the rental industry. The implications of having the wrong person fulfilling a critical role, such as Hire Controller, Driver or Mobile Engineer, are enormous: however you cut it, it's our people that make the difference in the end and settling for anything but employing the best is a sure-fire way to deliver sub-standard service and ultimately to lose customers.

Employ captains

In addition to hiring the best players possible, I've learnt that employing for attitude is a better barometer of likely success than focusing just on the number of years that a person may have in our industry (we often call this experience).

Attitude always wins for me and I'm constantly looking for people that are obvious winners with a winning mentality, people that demonstrate the ability to be captains within the team, even if they aren't necessarily in a supervisory position currently. Natural leaders will always get a place on my team but only if they can also demonstrate a team ethos as well. Players who think only about their personal position and what's in it for them, won't make my team, irrespective how good their own ability might be.

We operate in a team-based environment and it's the collective strength of the team that will differentiate us from our competition. Any weak links or people that are in the wrong role will ensure that we will be found

Key players

out by customers and our competition, so we need to focus on getting the best players in their respective positions on the pitch and that each and every one of our employees are leaders in their own right. Only then do we have a chance of being successful and building a winning team.

A world class system

Having great players, with great attitudes is clearly helpful when trying to build a successful business, but it's not enough on its own. The team needs to know what is expected of it and each player needs to know what standard they need to play to, and this is what I would call having a world class system of play.

This is a highly critical piece of the jigsaw because it underpins the natural talent that exists within each individual and it pulls it all together into a joined-up approach to doing the work that needs to get done. We shouldn't underestimate how important this is towards achieving the end result.

In fact, I would go as far as to say that a world class system of play can compensate for the lack of quality in some positions within the team, if it has to.

At Sunbelt Rentals we have OpX, which is our own operational excellence programme that every one of

our businesses has to implement in order to attain a world class set of operational processes. That means we run the business consistently well from every location, and our customers receive a consistently high quality of service. We have been engaged in implementing this for the last three years and we can see the significant improvements in our customer satisfaction levels on the back of this, as well as the operational benefits that this system of play brings to each and every one of our businesses.

It's not easy building a winning rental business, but over the years I have learnt that by focusing on these three areas and being uncompromising about delivering on each of them, we have a much better chance of success.

IRN

“...in general, winning teams have the best players playing for them.”

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.



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The evolution of Huurland

Pascal Ameloot on customer changes, growth plans and the rental market in Belgium

This year marks 50 years since Huurland was founded. In that time, much has changed for the company. In 2007, CEO Pascal Ameloot, alongside his siblings Sofie and Isabelle, took over the business. Since then, it has seen a number of significant changes. In a recent video call, Ameloot talked *IRN* through the evolution of the company and its plans for future growth.

Changing direction

It would perhaps be more of a surprise to suggest that a company that has been around as long as Huurland hasn't seen some form of change or evolution. On the contrary, since taking over as CEO from his father in 2007, Ameloot has overseen plenty of development, perhaps most notably in its targeted customer base.

Ameloot tells *IRN*; "My father stayed loyal to the smaller customers, especially the homeowners. We had very small shops, mainly shops with one or two people in every city.

"One of the first things that we noticed (after taking over) is that that market was quite saturated. It hadn't shown any growth in the last couple of years. And then, around 15 years ago we decided to focus a lot more on contractors.

"Since then, the contractor is our focus customer and we have grown from a revenue which was 50% contractors 50% homeowners to now, where it's over 80% contractors. The homeowner is still our customer, but our marketing and sales focus is purely on the contractor."

Following the change in customer base, the company opened a new site last year that serves as its main depot for its fleet of between 400-500 units of large



The company's larger equipment is held at a centralised depot known as Huurland XL.

equipment, which mainly serves contractors. Known as Huurland XL, the site is the 12th the company has opened in Belgium, adding to its 11 localised branches that focus on local presence.

Meanwhile, Huurland has also experienced significant growth in its turnover, as Ameloot reveals; "We've grown 12 to 15% every year since we took over the business. In 2007 we had around 20 to 30 employees, now we have around 90. Our turnover was around €2 million. That is now heading towards €16 million."

Future opportunities

The company, which was awarded East Flemish SME of the year in 2022, isn't resting on its laurels, and further growth has already been outlined. And, while

many rental companies in Europe have targeted new territories as part of strategies, Ameloot says he has no plans to expand globally, instead prioritising growth in Flanders, which he expects will take 5-10 years; "I think we will need about five more depots to cover the region, and there will also be space for satellite depots along the way as we gain more coverage in the market, but with five depots, we would cover the area quite well"

To achieve this, the company will look to acquire other businesses, something it has only done once previously when it acquired Global Rent, a small family-owned business in the Belgian town of Boortmeerbeek. While stopping short of revealing any names, Ameloot says; "Acquisitions for us, they play a part in growing the area that we service. When we want to start in a new

city, we look at green fields as well as acquisitions, both are valid growth or expansion opportunities.”

Meanwhile, Ameloot reveals the company is also looking to expand and diversify its fleet, with a move into more specialised equipment on the cards; “Our growth path for the next couple of years will be to grow the fleet and to further diversify it to offer more specialised goods, things that we in the past have always been a bit wary of because it was too complicated with the multi branch strategy.

“For example, rotating telehandlers. We still don’t have them because in the past we looked at them as too complex for our people to deliver to the customer, and it’s a mainstream machine in the market, but for Huurland, it is still a challenge, and we want to evolve in that sense.”

Market saturation

In terms of the rental market in Belgium, Ameloot says that despite it being saturated with smaller rental businesses, there are still “consolidation opportunities” for the company. In particular, he believes the company’s service model is helping it to stand out in an industry in which Boels and other “national players”

A voice for Belgian rental

Alongside his role within Huurland, Ameloot has also recently taken up the role of secretary of recently formed rental association the Belgian Equipment Rental Association (BERA). He says he was one of the “demanding parties” behind the creation as smaller companies in Belgium needed something to “give them a voice”.



Ameloot says, “In Belgium, we have quite a complex political landscape, and as rental companies, we are very diversified. Most of the Belgian rental landscape is smaller, family-owned businesses. They often have no voice in terms of policy.

“I was really convinced that we needed to regroup all the Belgian rental companies together so that there is more exchange of information and knowledge to really create a platform from where we can really sense what are the difficulties and the challenges that they are confronted with and bring that to the policymakers.”



Ameloot spoke at the unveiling of BERA at Matexpo in September.

have entered; “I think we differentiate really strongly from the national players, and it is well appreciated by our customers.”

On the state of the wider construction sector, he says that material costs and the current state of the property market in Belgium is causing nerves among construction businesses, despite a fairly stable picture

at present. He says, “We’ve seen fairly large price increases on construction materials, together with higher demands in terms of energy and environmental performance of the buildings that have been erected. So that has driven building prices up enormously.

“There’s a lot of anxiety about what’s coming in the next couple of months. It’s quite difficult as a rental company because if you’re in sales, you know that if there will be less building, you will sell less building materials.”

Despite some anxiety, Ameloot is more optimistic about the outlook for the rental industry and that of Huurland. He says, “If the market is anxious, then as a rental company the operators might rent equipment instead of buying their equipment because it gives them more flexibility. So, maybe there will be a drop in volume, but there might also be an increase in rental versus sales of equipment.

“We are quite confident that for us as a business, we are quite diversified. We don’t have large portfolios with singular customers. We are confident that business will be quite stable and continuous for the next couple of years, even if we go through a little rougher water now.”

IRN



The company shifted its customer base when Ameloot took over as CEO, with larger equipment now part of its offering.

PHOTO: HUURLAND

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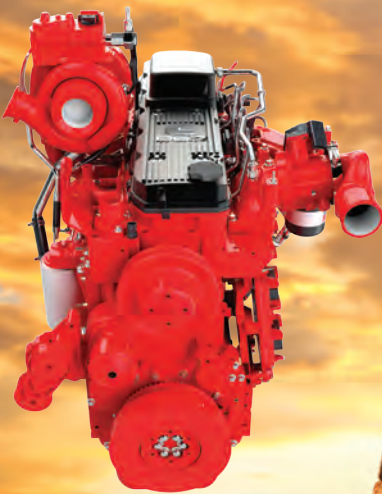
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SPOTLIGHT ON

European rental

With the inaugural European Rental Week taking place in October, *IRN* takes a look at the themes and events that will shape the event.

Dedicated to the promotion of rental across Europe, European Rental Week is to take place on 9-15 October. The annual event will focus on the theme of 'Investing in People' and will coordinate promotional activities from rental companies to improve the attractiveness of the industry, raise awareness of the rental concept, and promote rental as a sustainable, cost-effective solution.

As part of the event, a number of promotional activities have been organised by the European Rental Association (ERA) and its National Association and Promotion Committees.

European Rental Week competition

Employees of rental companies are invited to participate in a competition that demonstrates the benefits of working in the industry. Organised by ERA, the competition has been created to promote careers in the rental industry, with employees encouraged to film and post videos on their social media about why they enjoy working in the industry and why others should consider taking up a role in rental.

Using the hashtag #WorkInRental, videos posted on X (formerly known as Twitter), LinkedIn, Facebook,

Instagram and TikTok up to the 15 October will be eligible. The winner will be awarded a trip to Lisbon (flights and hotel for the winner and another person) and recognition at the ERA Convention and European Rental Awards next year. Three runners up will receive a €100 Amazon voucher.

Michel Petitjean, Secretary General of ERA, said, "The theme for this first ever European Rental Week is 'Investing in People' and we really want to showcase the great careers and opportunities that the rental industry provides. People are the lifeblood of the industry and are our best advocates.

"We want to give a bigger voice to the people who know our industry best and to bring those many great reasons to work in rental to a much wider audience."

What else will take place during European Rental Week?

Throughout the course of the week, other events will also be held. In the UK, Plant Hire Week has been confirmed, with Scottish Plant Owners Association (SPOA) taking part.

Callum Mackintosh, President of the SPOA, said, "Plant Hire Week gives us an opportunity to focus on the benefits of and the careers in plant hire, as well as focus on some of our members. We are looking for members to come forward and get involved in Plant Hire Week.

"The SPOA will help to promote member events that are organised, and we are planning a full week of content dedicated to plant hire and careers in plant hire. I really hope that members get behind this initiative and support it."

Spanish Rental Association ASEAMAC is inviting its members to participate to "raise awareness about the advantages of renting" and says it will provide "different proposals that promote recognition of the union and strengthen the rental image."

In France, DLR will participate by reactivating its "Renting is winning!" campaign, while Verhurend Nederland is offering Dutch rental companies the opportunity to take up the challenge of becoming Rental Company of the Year.

Rental companies can register for the following awards:

- Rental company of the year – category: machine
- Rental company of the year – category: catering and event
- Rental product of the year

Finalists for the award will be announced on the 11 October.



European Rental Week webinar

On 11 October, organisers ERA will host a one-hour webinar that will be live streamed from 11.00 CEST from a Loxam depot in Paris. The 'Building the Future' webinar will focus on attracting new and skilled workers into the rental sector and will also provide the latest statistics and growth projections for Europe's rental market.

The webinar programme is as follows:

11:00 – 11:10
INTRODUCTION

Stéphane Hénon, ERA President

11:10 – 11:20

THE ERA MARKET REPORT 2023

Sevra Rende, S&P Global

11:20 – 12:00

PEOPLE IN RENTAL: PANEL DISCUSSION AND Q&A

Huw Longton, ERA (moderator)

Jean-Baptiste Annat, Eurogroup Consulting

Jose Blanco, ASEAMAC

Daniela Niederstätter, Niederstätter AG

■ Registration for the webinar can be found here: <https://na.eventscloud.com/era-building-the-future-webinar>

IRN

Diversity and inclusion

As companies rush to introduce diversity and inclusion programmes, Emma Porter, managing director of Story Contracting tells Lucy Barnard how the company is becoming a more welcoming workplace.

According to the Bureau of Labor Statistics, the number of women employed in the US construction industry rose slightly from 9.3% in 2002 to 10.9% in 2022.

PHOTO: ADOBESTOCK

When she started working in the plant hire business, Emma Porter noticed that many staff were being asked to start work at seven in the morning without any apparent reason.

"The plant hire division started out providing internal plans to the wider Story Contracting company and so that meant that the teams needed to be in first thing in the morning because they were preparing the machines for the day, which made sense," recalls Porter, now managing director of UK-based contractor Story Contracting.

But as the company grew and diversified to become an external plant hire firm, staff contracts continued to

contain a 6.30am start time, even though there was no practical business case for them to do so.

"We didn't really need to be in at 6:30am or 7am – but it was just decided that was the start time. And so, for years that was the start time in people's contracts," she says. "But if you've got young children that you need to drop off at childcare in the morning, nurseries are not open at six thirty in the morning. And so, we, for no business reason at this point, had a barrier that really restricted the people who could apply for that work."

Diversity and inclusion

For Porter, who also runs Story's plant hire division, Story's inconvenient start time is just one example of the barrage of 'microaggressions' which together form a "horrible black fog of unconscious bias," which continue to make life harder for women in the construction industry and which has prompted her company to adopt a new diversity and inclusion programme aimed at making the company more welcoming.

"Often when I talk about diversity, I talk about the need for different perspectives, but I'd really missed just how much my perspective meant that I was seeing issues that others weren't," says Porter, addressing an audience at the European Rental Association Convention in Maastricht this summer. "I would be frustrated thinking why aren't they fixing this? This is a problem.

But the key reason they were not fixing these problems was because from where they were standing, they didn't see it."

And Story is not alone. Spurred on by the #MeToo movement and #BlackLivesMatter, corporates around the world including many in construction such as Vinci,

in construction

Bouygues, Skanska, Bechtel and Hochtief, have been rushing to introduce and upgrade their own Diversity & Inclusion programmes and training, aimed at finding ways to boost their numbers of women and BAME employees and find ways to retain and promote them better.

Certainly D&I training programmes are becoming big business. The global D&I industry which covers training programmes, resources groups and recruitment support, is projected to grow by 12.7% over the next decade to reach a total value of around US\$30bn by 2033.

Within construction, a record 2,345 companies took part in Construction Inclusion Week in 2022, nearly double the number which took part in its inaugural year in 2021 and more are expected to join this year's event in October.

Supporters say the moves show a real determination from C-suites to make a difference. Critics see such efforts as examples of 'wokeness' and argue many initiatives are just tick box exercises evoking little meaningful change.

The benefits of diversity

For finance directors, the rewards are appealing. A 2020 report by McKinsey which found that companies with gender diverse executive teams were 21% more likely to experience above-average profitability while those with a higher representation of women on their boards saw a 42% higher return on sales and a 66% higher return on invested capital than those with all-male boards.

And yet, despite small hints of progress in recent years, construction as a whole remains one of the most male dominated industries in the world and is seen by many as epitomising some of the worst examples of a workplace culture of toxic masculinity.

According to the Bureau of Labor Statistics, the number of women employed in

the US construction industry rose slightly from 9.3% in 2002 to 10.9% in 2022.

In the UK, the Office for National Statistics says the number of women in construction grew to 340,000 in 2023 - representing nearly 15% of workers. And in Australia, the Australian Constructors Association says women represented 12% in 2022. Moreover, if you count the number of women in site-based roles, the numbers are even smaller.

In May 2023, the US Equal Employment Opportunity Commission published its latest report into employment discrimination in the industry. Citing examples from its own recent investigations, it reported that harassment and overt discrimination continue to prompt many women and people of colour to leave the industry while discrimination in apprenticeships and hiring prevents many more from entering it in the first place.

Although Porter says Story does encourage staff to take part in some 'unconscious bias' training exercises run by Scottish training firm Insights, she says Story's main DE&I strategy revolves around three inter-related actions: Swiftly and decisively dealing with examples of overt sexism; removing so called 'microaggressions' from the business; and actively working to understand and correct the sea of unconscious bias pervading the industry.

Changing attitudes

Porter says that although examples of bigoted behaviour continue to dog the industry, in her experience, changing attitudes in society, greater awareness of employment laws and awareness campaigns such as #MeToo are making such cases rarer and easier for good managers to deal with when they do occur.

"Actually, that very explicit kind of



“ Often when I talk about diversity, I talk about the need for different perspectives. ”

EMMA PORTER,
Managing director of Story Contracting.

old-fashioned view that women just don't belong here and why would you even want them is pretty uncommon," she says. "When you do come across it, it's fairly easy to deal with as well because most people around you will agree it's unacceptable. And so, you can stamp it out pretty quickly and get on with it."

"The problem is that because it [blatant sexism] happens less and less, people mistakenly take that as evidence that now it's all fixed and there's no problem."

A second area targeted by Porter's strategy is the daily barrage of so-called 'microaggressions' - small interactions or signs which help create and perpetuate the sort of environment where some team members >



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feel uncomfortable – are rife within construction and are preventing the industry from becoming more diverse and inclusive.

First coined in the 1970s to describe the kind of tiny everyday annoyances that help create and perpetuate the oppressive environment in which a disadvantaged group lives, microaggressions can include anything from having your name constantly mispronounced to being talked over in meetings.

“They are all small things; the ‘dear sir’ on your email, the fact that there are no ladies’ toilets or sanitary bins on site, or all your company’s literature has only photos of men in it,” Porter says.

“They seem really petty – and you don’t want to make a mountain out of a molehill. And that’s what makes it hard to address because you think oh well, it’s fine, it’s only one email, I won’t make a fuss. But in this case, the mountain is made of molehills.”

Microaggressions

“These small things add together to make you think that you don’t quite fit in and they undermine you,” she says. “They unintentionally send a message that you don’t belong. They are constantly low-level signals that cumulatively send a message that you don’t belong, and you shouldn’t be there.”

Porter argues that removing these unintended microaggressions is one of the easiest ways in which business leaders can act to make businesses both more welcoming to all staff and ultimately more competitive.

“The nice thing about these unintended microaggressions is that no one is really offended if you point out that you’re not a sir or that the PPE supplies doesn’t fit you. So, once you’ve spotted them, they’re also fairly easy to fix. It’s just a matter of seeking them out one by one and getting rid of them.”

Harder to deal with, she says is the many examples of unconscious bias which continue to hinder women’s progress in the construction industry through a variety of ways, many of which may not be immediately obvious.



As well as benefitting from an unconscious association with stereotypical views of leadership, men tend to be judged differently in terms of performance. They tend to be promoted on potential whereas women tended to be promoted based on experience, meaning the men were promoted earlier in their careers. Meanwhile women could suffer from “benevolent sexism” where line managers failed to provide accurate feedback or did not offer women the chance to take on challenging projects in order to protect them.

Vinci is one of the many construction companies to have made inclusion and diversity online courses available to employees. PHOTO: VINCI

Tackling unconscious bias

Porter says that combatting unconscious bias in companies is a constant and evolving task. Unlike a number of firms in the sector, Story has stopped short >

“ They are constantly low-level signals that cumulatively send a message that you don’t belong, and you shouldn’t be there. ”

EMMA PORTER,
Managing director of Story Contracting.

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The view from rental companies

It's well documented that the rental industry is one that is seeing issues with attracting and retaining talent. To tackle this, and to improve diversity and inclusion, rental companies are deploying representation goals.

For example, United Rentals has set a date of 2030 to achieve 40% diverse representation in sales and management job groups. In 2022, the figure stood at 33.5%, a 7% increase compared to 2021.

Meanwhile, in its sustainability report for 2022, Renta Group says it prioritises training for existing employees to attract and retain talented and competent staff.

IRN also spoke to two associations for comment on the wider issue of attracting talent to a career in rental. Marco Prosperi, director of Italian association Assodimi told IRN that one of the biggest tasks facing the sector in Italy is a lack of young people filling roles; "Unfortunately, the rental sector is not present on the agenda of young people who have completed their studies and therefore the search for new figures is becoming complicated.

"Assodimi has been trying to communicate with schools and universities for a few years now, but the response has been very timid. This year Assodimi has recruited a communication company that manages very original and social oriented marketing campaigns in order to try to establish a dialogue with the under 25s to raise awareness of the rental world and its potential.

"The project involves both a social campaign carried out by the association and the creation of a kit to be provided to all Assodimi members so that they in turn can use the same communication approach for personnel recruitment."

Elsewhere, Verhurend Nederland says the Dutch market is struggling to fill technician and sales positions. "Our members have a lot of vacancies which are hard to fill, and then the problem arises to keep the personnel which has been recruited", Verhurend Nederland secretariat Silvia Bakker told IRN.

"Verhurend Nederland has organised a webinar to inform our members about employer branding and the ways in which new employees can be recruited successfully."



Renta Group says it prioritises training for existing employees to attract and retain talented and competent staff. PHOTO: RENTA

of introducing mandatory unconscious bias training for staff and instead uses Insights staff training to provide a starting point to initiate discussions on why diverse teams are important.

"This is not something that your people team can do for you. It's not something that one initiative will fix," she says. "It's really about paying attention and asking people do they feel heard in meetings? Take on board a wider range of views when you're making decisions and ask for feedback more as a leader. Always advocate for people who aren't being heard and take the time to notice the person next to you to really notice them and think about what your business might look like from where they're standing."

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RAMISHARE SOLUTION

Ramirent is offering their solution 'RamiShare', which is based on the "Imperto SiteShare" product, as part of their digital solution suite. The solution is designed to offer shared equipment pools on construction sites that can be used by all contractors.

Ramirent together with the main contractor specifies a fixed location for the equipment pickup and return. During the construction phase, equipment demand is analyzed and adjusted taking into account inputs from the main contractor and subcontractors. This ensures that customers have easy access to tailored equipment specifically suited for their needs right at the construction site.



Ramirent sales representative Lars Marcellussen (in the back) informs a customer at the construction site of the new county hall in Bergen on how RamiShare solution works
(PHOTO CREDIT TO RAMIRENT)

MINIMIZING TRANSPORTATION

RamiShare offers a significant benefit as it prioritizes environmental friendliness and sustainability, effectively minimizing the need for transportation to and from the construction site. By eliminating most of the transportation associated with rental equipment, this solution greatly reduces carbon emissions and contributes to a greener construction process.

Moreover, the solution provides a high level of flexibility and cost-efficiency for customers. They have the freedom to rent machines for specific periods, only paying for the duration they require them, rather than being charged when the equipment is not in use. This approach not only saves customers valuable time but also reduces unnecessary expenses, ensuring they have full control over their rental costs.

"Here the machines are available when they are needed, and there is no need for as many machines to do the job as before, as more people will share the same equipment," explains the manager of CC Rental in Ramirent, Lars Magne Zahl.
(PHOTO CREDIT TO RAMIRENT)



"We are located on a large and cramped construction site in the center, and by using the new system we get far fewer players to deal with and far less traffic through the construction area," explains Edvin Hesjedal from LAB Entreprenør AS; here with Ramirent sales representative Ingunn Pedersen.
(PHOTO CREDIT TO RAMIRENT)

SATISFIED CONTRACTOR

Having the responsibility for overseeing the equipment, operations, and logistics of the county hall project in Bergen, Edvin Hesjedal from LAB Entreprenør AS, confirm that testing of the new solution has been exceptionally satisfactory: *"I have actually worked on getting a couple of similar solutions before, at that time as an employee in the rental industry, and this is clearly the best version I have seen so far."*

For more information contact:

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As inflation and high interest rates hit Germany, what does the future look like for the construction and equipment industries? Lewis Tyler reports.

Cause for concern?

While Germany remains one of the more mature markets within Europe in terms of both construction equipment and activity, the country has been hit with inflation and higher interest rates. According to analysis by German construction industry body Bauindustrie, turnover among construction companies with 20 employees or more fell by 7.3% in real terms year on year in the January-May 2023 period.

Split down by different segments, building saw a 9.4% real terms year-on-year decline in revenue in January-May 2023 (stripping out the effects of inflation), while civils saw a 4.5% drop.

Forward indicators are perhaps even more of a concern, with Bauindustrie's figures showing a 14.7% decline in new construction orders between January and May 2023 compared to the same period a year before.

May also saw a month-on-month decline in new orders of 5.7%, making it the 14th consecutive monthly drop in new orders.

Bauindustrie's general manager Tim-Oliver Müller says the 14th decline in a row showed that the "downward pull has construction firmly in its grip".

According to Bauindustrie, the situation is down to a combination of rising interest rates, set by the European Central Bank (ECB), and price inflation that

reared its head in the wake of the covid pandemic and the Ukraine war.

Meanwhile, a report from the European Construction Industry Federation found that in 2022, the upward trend in the housebuilding sector (62% of total construction investment) was halted, with a decline of 2.1%.

It also found that the war in Ukraine led to a sharp rise in the cost of construction materials, which was reflected in higher prices for construction services. According to the Federation, the 15.9% increase in price was "the strongest in decades".

Among other concerns, according to the Federation,

is energy and material prices; "The problems facing the construction sector have changed significantly. Energy and material prices are now the biggest threat to construction companies, cited by 81% of them in January 2023. Another 67% report risks due to a shortage of skilled labour, and 58% due to a lack of demand."

Construction equipment market

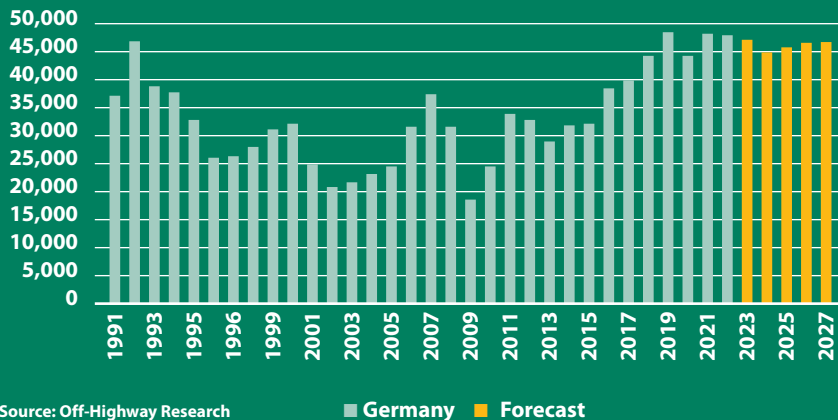
Elsewhere, a study from Off-Highway Research found that the German construction equipment market remained subject to an extremely high level of demand

PHOTO: PICTURELARIOUS VIA ADOBESTOCK

Bauindustrie is lobbying for more support for the industry from government and more investment in the housing sector.



UNIT SALES OF CONSTRUCTION EQUIPMENT IN GERMANY



A construction site in a new district of Frankfurt.

PHOTO: EUROPAPIERTEL VIA ADOBESTOCK

during the first half of 2023, with sales rising by around 11% compared to the equivalent period in 2021. However, this picture is somewhat distorted by the fact that much of this demand comes from an order backlog from 2022, the company says.

The report stated that the level of new orders received in the first half of 2023 had fallen by nearly 20%, and many suppliers now expect that retail sales will decline in the second half of the year.

Chris Sleight, managing director of Off-Highway Research says, "For the last couple of years (2020 notwithstanding), it has been at a very high level – on a par with the volume of equipment sold during the reunification boom of the early 1990s.

"One of the big drivers for this has been house building, stimulating sales of smaller machine types like mini excavators.

The current forecast for the construction equipment market laid out by Off-Highway Research is for a "gentle downturn", although Sleight says "it remains to be seen whether this holds" off the back of the wider state of the construction sector.

Off-Highway Research says the outlook for new equipment in 2024 is "more uncertain, and the declining level of new orders suggests that demand may fall by 5-10 per cent."

On the wider sector, the company says the long-term

outlook for the German construction industry "remains optimistic with significant investment in infrastructure and general construction sectors."

Meanwhile, Germany-based aerial platform rental company cooperative System Lift says capacity utilisation remains high, although it has noticed fluctuations in individual customer sectors.

The organisation, which consists of 70 partner companies with more than 20,000 rental machines spread over more than 135 branches, says it spent €57 million on over 1,600 machines in 2022 through a purchasing pool.

While figures for 2023 are not yet available, Christopher Friedrich, member of the board of System Lift says the organisation is positive in its outlook; "System Lift continues to grow. On the one hand, we are consistently expanding our services for our System Lift partners, on the other hand, we are permanently improving our service quality. We continue to look to the future with optimism.

"We currently see no slump or direct impact of the economic development on our industry. Even if the brewing industry is currently weakening, Germany continues to grow. Examples here are the expansion of photovoltaic plants and the expansion in the wind energy sector."

Is German construction heading towards a recession?

In response to fears of a looming recession in the German construction market, Bauindustrie is lobbying for more support for the industry from government and more investment in the housing sector.

It has set out a series of key points that it argues would give construction companies some breathing space in a difficult trading environment.

Those points include:

- Digitalisation of planning and construction permit procedures
- Harmonisation federal, state and local building regulations and planning law
- Interest rate reductions
- A more generous regime for investors that allows them to depreciate a greater proportion of their investments over time
- Promoting the use of repeatable, modern methods



PHOTO: DEVELON

Develon invests in new facilities in Germany

Develon is planning construction of a new customer support and training centre in Mannheim, Germany.

The new site is intended to support further market growth across Germany, Austria and Switzerland.

The facility will include a training centre, together with a machine demonstration area.

Develon's Mannheim location will join a new parts distribution and service centre in Germany. This location also has a rental fleet comprised of the latest generation of company machinery.

The two facilities will operate under HD Hyundai Infracore Deutschland GmbH. Andreas M. Lohner was initially appointed as sales manager for the DACH (Germany, Austria, Switzerland) region, but will now act as MD for the new company.

Lohner commented: "By deciding on a fully equipped transitional location, with a workshop that started operating in June, a well-stocked spare parts warehouse, a rental fleet, the latest generation of machines and a wide range of new machines, we can already provide fast, pragmatic and reliable support to customers and partners in the Rhine-Neckar metro region. Every new customer actively helps to create more jobs in the region."

- of construction to speed up construction schedules
- Access to discounted public land on which to build
- Federal subsidies for social housing
- A lowering of what it called "unnecessarily high standards" in construction when it comes to energy performance

Of course, the role of government will play a key role in the recovery of the industry. In late September, Reuters reported that the German government will put on indefinite hold plans to require more stringent building insulation standards as part of a €45 billion relief fund to help prop up the ailing building industry.

Berlin will make €18 billion available until 2027 for affordable housing, while the rest of the funding will come from federal states and municipalities. **IRN**

IRN looks at how rental software is helping companies to streamline the rental process and improve user experience.

Streamlining

In the evolving world of equipment rental, improving the entire process from order to delivery and everything in between is essential. As endless amounts of data is collected, confusion as to how best to utilise the data often occurs.

Of course, as sites and machines become more intelligent, so to must the processes of users. To achieve this, rental software providers are stepping up efforts to produce user-friendly solutions that reflect the needs of rental companies and their customers.

Remote solutions

A trend in many industries is the switch to remote working. And, while the era of office-based working may be a not too distant memory, progress in software has enabled remote working to filter into the construction/rental industries.

For example, Australia-based software company Baseplan says it decided to launch its Baseplan Mobility App (BMA) after it noticed a demand for “flexible, on-the-go solutions.”

Key features of the BMA include the Activities Dashboard which serves as a central hub for tasks, Enhanced Search Capabilities which allows users to locate critical information via different parameters, Contract Creation for full control over the rental process and Rental Returns.

According to Baseplan, these are just some of the features that allow rental companies to “seamlessly bridge the gap between in-field workforce and office staff, creating a real-time communication channel



The Baseplan Mobility App (BMA) has features that have been designed specifically for mobile devices.

PHOTO: BASEPLAN

that ensures every aspect of the rental process is interconnected.”

“Rental companies can experience a significant reduction in costs, an increase in productivity, and an elevation of customer satisfaction, all underpinned by a future-proof framework that adapts to the evolving tech landscape.”

Meanwhile, Point of Rental will launch its new Point of Rental One mobile app in November, with remote working once again a driving force.

Available on both iOS and Android devices, the company says the app is designed for rental companies that need to carry out work where the customer is, a feature that Point of Rental believes will be vital going forward as mobile work in the hire industry is “only going to increase moving forward.”

Point of Rental says, “Syrinx 365 users will find the functionality of both the legacy Operator application and Workshop application within POR One. This centralisation will make working remotely much easier, with the important functionality found in a single location.

“Users will be able to distinguish time management between item breakdown and item repair, as well as equipment return checks and full equipment inspection.”

For employees on site, the

company says Point of Rental One users will have more control over the details in every interaction, including the ability to add line-level notes such as advisories and photo images.

Another feature the company is working on is location tracking, which will allow verified users to see where their engineers are currently located. Based on their location and tool set, engineers can then be assigned a call-out if a customer reports an issue.

Improved user experience

BigChange has launched an online portal for equipment rental companies that gives end customers a way to book and track orders online.

The company says the portal gives access to contract information, ranging from bookings and job cards to images, quotes and invoices.

Additionally, customers can monitor the status and estimated arrival time of drivers or engineers en route.

Jonathan Isaacs, product marketing manager at BigChange says the portal can help equipment rental companies and engineering and construction service companies to both broaden their horizons and secure larger contracts.

Isaacs says, “With the introduction of digital working and a very flexible app, they find they can meet the most stringent demands of larger corporate and public sector clients. The portal provides a transparent, easy-to-access and real-time view of all jobs and finances; it’s exactly what their customers want.”

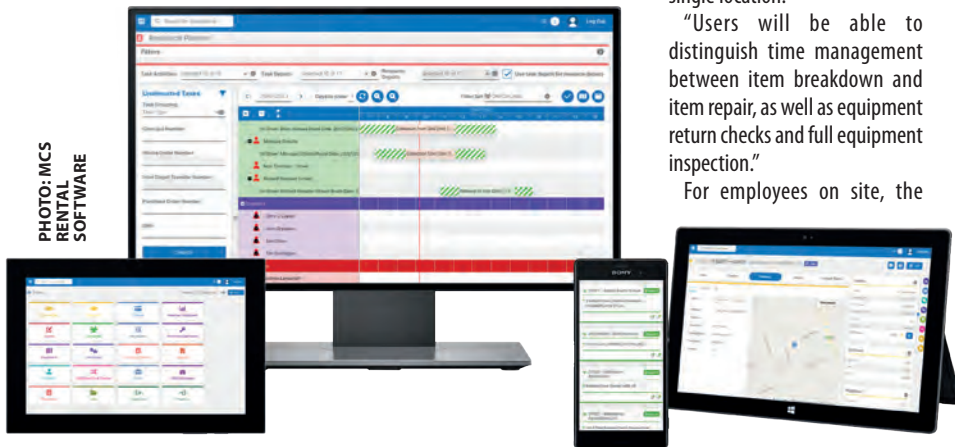
The customer dashboard is integrated into the BigChange job management system, which encompasses mobile workforce capabilities, customer relationship management (CRM), job scheduling, live tracking, financial management and business intelligence.

Service requests for a new rental contract or emergency call-outs are completed via an on-screen booking form

A screenshot of the new BigChange customer portal.

PHOTO: BIGCHANGE

PHOTO: MCS RENTAL SOFTWARE



MCS Rental Software revamped its web solution interface in July.



rental

that includes a calendar to select their preferred time slot.

Once the job is confirmed and scheduled, BigChange's software automates notifications, including reminders and job completions, providing customers with real-time updates on job progress, accessible via the customer portal.

Elsewhere, MCS Rental Software has launched its revamped web solution interface to facilitate easier mobility and smoother operations for rental companies.

MCS says the upgraded platform comes as a result of the growing importance of enhancing user experience and is "user-friendly, intuitive, and faster in providing essential information."

According to Guy van der Knaap, managing director of MCS, one of the key features of the update is quicker access to information and "improved usability, clearer workflows, and enhanced structure."

Van der Knaap says, "Rental companies are constantly seeking ways to work more efficiently and maximise their productivity. While we continue to develop new solutions to support their operations,

A screenshot of the Point of Rental One app.



PHOTO: POINT OF RENTAL

PHOTO: WYNNE SYSTEMS

Wynne Systems says its RentalMan software can help increase growth and revenue.

we also wanted to reassess our existing offerings and adapt our web platform to deliver an even smoother service.

"With the inclusion of new features like enhanced mobile responsiveness, improved accessibility features, and simplified navigation, using MCS web solutions has become incredibly user-friendly."

In the US, ease of use was also a factor for Wynne Systems with its newest additions to its RentalMan software.

The User Interface, a new web-based interface was launched in May, while IntelliSource, a new add-on solution for RentalMan that brings intelligence and automation to rental equipment sourcing for reservations and RentalMan Mobile, a solution that combines driver and service technician capabilities into one, easy to use mobile application, are expected to launch in Q4 of 2023.

equipment types, divisions or user roles, while TouchPoint also enables transport planners to batch multiple work orders into one transport job, meaning drivers won't have to repeat steps.

"TouchPoint integrates with specialist truck navigation apps and updates the truck dimensions as loads change, helping drivers avoid accidents and bridge strikes by tailoring routes to the truck's dimensions", Spartan says. "TouchPoint also integrates with what3words so that the driver can quickly navigate to the exact customer location."

Another feature of TouchPoint is live Estimated Time of Arrival, meaning Hire Control can update customers when unforeseen delays occur. Drivers can also add unexpected return items during pick-up.

Spartan Solutions' chief operating officer John Glen said, "When we spent time in the truck cab, we realised why drivers were frustrated with the technology they rely on to deliver and return equipment. Issues with badly designed mobile apps and fiddling between multiple devices to do their jobs can slow them down. Direct driver feedback inspired us to launch TouchPoint, a one-stop solution for transport planners and rental drivers."

Sycor says its Sycor.Rental, a Microsoft-based ERP system, is tailored to the needs of equipment and bulk rental and enables users to manage their entire business from one ERP platform.

The company says, "The unique thing about Sycor.Rental is that all rental features are fully embedded in the ERP software, there are no interfaces and

users don't notice any difference between using standard-ERP or Sycor.Rental supported processes.

"On a feature and process level, Sycor.Rental in conjunction with the ERP-standard covers the full scope of rental processes from a horizontal and vertical perspective, from procurement to pay over order to cash and the supporting processes such as general accounting, fixed assets, service management and transport planning."

Following feedback from users, the company has added three new features. Firstly, the

Customer focus

Collaboration was a key factor for the newest launch from Scotland-based company Spartan Solutions, a driver app designed in partnership with rental drivers to deliver a safe and efficient transport workflow that improves customer experience.

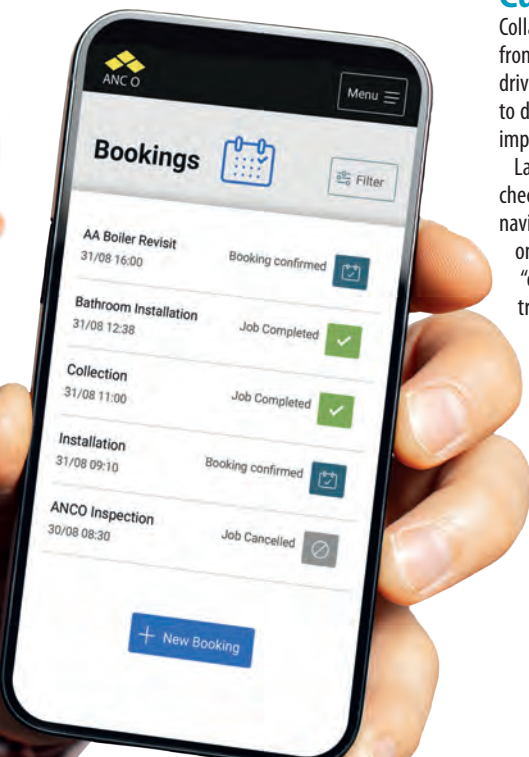
Launched in September, TouchPoint combines vehicle checks, work execution and truck navigation into one, ensuring only one mobile device is needed for "efficient, paperless equipment transport."

Data capture forms are customisable to specific



PHOTO: SPARTAN SOLUTIONS

TouchPoint from Spartan combines vehicle checks, work execution and truck navigation into one app.



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Sycor.Rental mobile app. The app connects with the ERP out-of-the box in real time and covers processes such as picking, delivery, handover, returns and equipment information.

Another new feature is the Sycor.Rental Customer Portal, which gives customers access to information on invoices and delivery notes, enables them to check orders and project information as well as extend or shorten rentals.

Elsewhere, the company has added Dispatch Board, a fully integrated graphical scheduling board that shows the availability of all kinds of equipment with a powerful set of search options and other useful features.

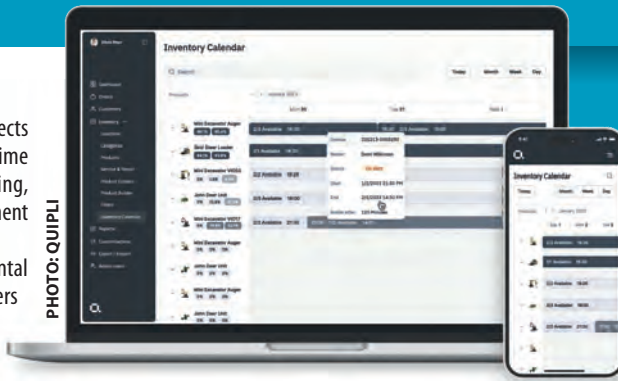
Meeting software demand

For Denmark-based Trackunit, the issue of emissions reporting for the construction industry is a particular focus. According to Kristoffer Dubois of Trackunit, the next step in tracking emissions is to "take the guesswork out" by utilising live-data tracking.

Kristoffer Dubois of Trackunit argues that utilising live-data tracking can take the guess work out of emissions reporting.



PHOTO: QUIPLI



Quipli says its inventory calendar is designed to tackle demand for software that is quick and easy to use.

but it is a necessary step in ensuring sustainable development in the construction industry."

While acknowledging the work and progress that construction has made in regulating CO₂ emissions, Dubois says "there is still a long way to go in establishing rigorous reporting standards."

Meanwhile, Quipli says it is seeing an increase in demand for making software easy and quick to help attract a higher caliber workforce.

Kyle Clements, founder of Quipli says, "We've seen a lot of trends recently towards making software very easy and quick specifically related to attracting a high-caliber workforce."

"In the US, there are younger employees coming into the workforce and to deal with the labor shortages, rental companies have been forced to adopt modern software that Millennials and Gen Z are comfortable with in order to attract and retain employees."

He goes on to say that he believes this trend is driving four functions in the rental software market: digitalisation and cloud-based solutions, e-commerce and online booking, integrated rental management and customer experience focus. "These are the core tenets of Quipli's cloud-based equipment rental software we've been developing for the past 3 years", Clements says.

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Rental in the Middle East

Byrne Equipment Rental and its journey

In the vast landscape of the Middle East, one company has stood out as a pioneering force in the equipment rental industry across the GCC region.

Byrne Equipment Rental, founded in 1992 in Dubai, UAE, started operations and quickly transformed itself into one of the largest plant and equipment rental companies in the region. Throughout its history, Byrne has navigated various challenges, from geopolitical shifts to economic fluctuations, consistently proving its resilience and commitment to innovation. It has been a remarkable journey, from its pioneering beginnings to its vision for the future.

Pioneering 1990-2000: amidst challenges

The early years of Byrne were marked by a scarcity of equipment and a prevailing trend of equipment ownership rather than rental.

Against the background of the First Gulf War, Byrne chose to stand firm, invest and capitalize on opportunities that emerged at that time. These included hiring mainly shore power to visiting foreign naval vessels, and meeting the early demand of the construction and infrastructure sectors, amongst others, over that decade. However, falling oil prices towards the end of the period brought challenges and clouds of recession.

Despite these challenges, Byrne grew to become one of the best-known rental players with a reputation for service, enjoying solid rental rates and high fleet utilization. Its growth continued organically, a testament to prudent business practices and strategic decision-making. The year 1995 saw the first depot outside of UAE in Qatar.

Developing 2001-2010: expanding horizons

As economies stabilized and improved in the Middle East, Byrne saw potential in expanding its services. The company capitalized on the construction boom, catering to the demand for rental equipment in various sectors.

Further strategic steps were taken to establish an operational base in the Eastern



province of Saudi Arabia in 2001 and to grow the fleet to meet the rising demands. One achievement in this period was Byrne's focus on the events market, serving the rental needs of large-scale international sports and entertainment events.



Developed 2011-2020: global challenges

This decade brought both challenges and opportunities. The impacts of the global financial crisis of 2008/9 gradually faded, and new opportunities arose in the oil and gas sector. Byrne adapted, with a focus on operational efficiency, investment in product offerings, and geographic expansion to ensure GCC-wide coverage in new markets.

When the global threat of COVID-19 appeared, it created many challenges and many were forced to create emergency plans to offset the negative effects. Virtually every sector of the market was impacted and none more so than the events industry. This once again posed significant challenges for Byrne throughout its now GCC-wide network of depots and offices.

Byrne found ways to face the challenges, by redirecting its resources and expertise to support local governments and organizations with buildings and equipment required for temporary field hospitals and related facilities.

Byrne's ability to adapt demonstrated its resilience and commitment to supporting communities and its workforce.

Future Vision: enabling efficiency and growth

Following the pandemic, Byrne has demonstrated resilience and determination, realigning its operations to get growth plans back on track. Capitalizing on Vision 2030 in KSA, Vision 2030 in Abu Dhabi and Vision 2040 in Dubai, Byrne has repositioned itself as a key player in the Middle East's development.

With its diverse fleet, geographical reach and focus on talent retention and technical qualifications, Byrne envisions facilitating operational efficiency through its equipment rental and lease solutions.

With a focus on operational improvement and efficiency and new investment into temporary buildings, power solutions and other equipment, Byrne continues to be a key player and is determined to develop on the experiences that have driven its success.



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Portability, durability and efficiency are key requirements for pump users, but how are OEMs factoring them in with their latest launches?

A versatile solution

While pumps may not be the first piece of equipment that springs to mind when the word versatility is mentioned, modern innovations mean they are suitable for many sites. Whether being used in the construction, mining or waste sectors, they are a versatile and popular product.

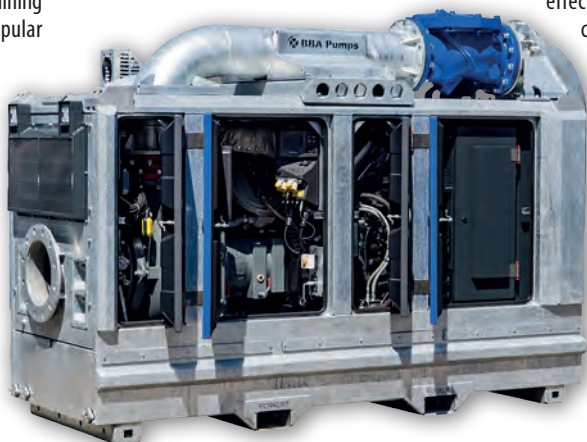
Of course, as job sites change, so to must the features and specifications of units. As with many industries, factors such as sustainability, efficiency, reliability and durability are all key requirements for users.

Whether they are looking for smaller units, electric models or easily transportable solutions, the latest launches often need to reflect the wider demands and needs of the end user.

The diesel driven BA300KS mobile sewage pump. PHOTO: BBA PUMPS

Cost of operation

In February this year, Atlas Copco launched its E-Pump range, a self-priming, zero-emissions dewatering range that consists of E PAS models with canopies for



the European market and the open configuration PAC electric models for the North American market.

The fully electric range, which is described by the company as versatile and flexible, comes with cost-effective benefits such as reduced maintenance costs, compact size for storage and lower cost of ownership due to its electric power.

The company says that for diesel pumps the efficiency of the prime mover is around 50%, where 50% of power is rejected in heat. For electric pumps, the efficiency of the prime mover will be around 94%, thereby making electric pumps more efficient.

In terms of trends, Atlas Copco says the growing demand for surface pumps is driving innovation due to the acceleration of water infrastructure development. "With advancements in pump technology and design and an increased focus on energy efficiency, the pump market is experiencing a transformation towards more sustainable pumping, meeting new regulatory norms", the company says.

The company also highlights the rise in fuel prices when asked what other factors are affecting the pump market, telling *IRN* that the instability of prices has led to doubt and unrest among global economies. This, says the company, has had a knock-on effect to the pump industry, with customers changing their product needs to reflect wider climate change goals.

Saksham Dube, marketing manager, portable flow at Atlas Copco, says, "We invest in the most advanced design and digital tools to make pumping a hassle-free experience for our customers. Our new range of fully electric self-priming surface dewatering pumps are customer focused and bring in high energy savings, durability and low operational costs so that customers

The HWP4 submersible pump with HPP18V power pack. PHOTO: HYCON



The new DE200/100 pumpset.



PHOTO: DXB

Atlas Copco says its E Pump comes with cost-effective benefits.

PHOTO: ATLAS COPCO



can focus on efficient liquid management and build efficient worksites."

Sustainable solutions

DXB Pumps says it is tackling sustainability factors by developing new products that minimise fuel consumption and emissions such as CO₂ and NoX.

The company has added to its range of Stage 5/ Tier4 emission compliant range for the international rental markets with the addition of three new smaller pumpsets that focuses specifically on reducing fuel consumption and emissions.

Part of the range is the new DE200/100 pumpset, designed for the quarry pump hire markets. The unit generates 200m³/hr at almost 11 bar operating at its best efficiency point using a smaller Deutz TCD3.6 litre engine generating 95kw at 2100rpm.

According to the company, this makes it one of the most economical 80mm high pressure pumps on the market for dewatering quarries, cleaning and jetting in industrial markets.

It comes in the same DXB3 canopy used in the SS300/70 and is equipped with a high efficiency 6X3 pump end for the higher pressure applications seen in applications where 8-12 bar is required by customers.

DXB says, "The three new units focus on the very

highly demanded 4" (100mm) and 6" (150mm) pump market where hire companies invest in large numbers of units every year to service the general pump hire markets in all countries. The third pumpset is an extension of the 3" (80mm) higher pressure range, again a highly demanded product in the general-purpose hire pump market."

DXB Pump is also launching the new 4" and 6", DE200/20 and DE325/15 high efficiency dewatering pumps for general hire.

Powered by a small Perkins 18kW engine, the 150mm unit pumps up to 500m³/hr and consumes just 5 litres of fuel per hour. The company says the small engine means no diesel particulate filter is required. Both come with a 25W solar panel and auto start-stop control panel as standard, ensuring the user benefits from reduced fuel consumption whilst in operation.

Another OEM seeing a shift towards a sustainable mindset is Dutch manufacturer BBA Pumps. The company says it is seeing strong demand for its pumps from the rental market as companies look to expand and renew fleets with environmentally friendly units.

Following this demand, the company will release an electric driven BA300KS pump unit in the future.

In terms of diesel-powered pumps, the company unveiled the new the BA300KS mobile sewage pump

in September. The company says the BA300KS, a 12-inch unit, has been developed for bypassing large sewage systems in densely populated areas and comes with a pump capacity of 1100 m³/hour.

Other features include a solids handling of 130mm, Stage V engine, discharge roof pipe, 100m³/hour vacuum system, increased free page and higher pump efficiency when compared with other pumps in its KS range.

Portable demands

Hycon says portability is one factor that is driving demand for its range of hydraulic self-priming pumps, which is made up of the HWP2, HWP3 and HWP4.

The company says its hydraulic self-priming solutions for bypass pumping are popular for small-scale jobs; "Not only does the hydraulic trash pump and hydraulic power pack easily fit into the back of a regular van. It also offers a performance that easily matches the performance of large, heavy electric submersible pumps and trailer-type diesel pumps – and at a much lower cost."

Jan Byrresen, Hycon's sales manager in North America, the UK, and Ireland told *IRN*; "We have experienced a great interest in portable pumping solutions for bypass pumping. This is a fast-growing segment that can really benefit from the great performance of our small hydraulic submersible trash pumps.

"Our customers typically need to move the pump to a new working area every day – or even sometimes more than once every day. This is easily done with our largest pump weighing only 26.7kg."

Hycon CEO Martin Møller adds, "The market in need of bypass pumping is growing. Not just in Europe but all over the World. In Germany, we have already seen large companies convert to our compact, portable pumping solutions. Our newest innovations are great additions to this industry."

IRN

Acquisition sees Tsurumi Pumps establish new sales company in Europe

Obart Pumps has changed its name to Tsurumi Pumps UK.

Based in Maidstone, England, Obart Pumps had been a distributor for the company since 1975 before it was acquired by Tsurumi Europe at the beginning of 2020. Tsurumi Europe said the change means it now has six sales companies in Europe, alongside locations in Belgium, Germany, France, Sweden and Spain.

No changes to contact details, ordering process or existing product range will be made under its new name, with the company's web address (tsurumi.co.uk) changing. Matthew Hill, managing director of Tsurumi Pumps UK said the change is a natural step for the company; "Tsurumi – pronounced Sir-roo-me – is becoming much more visible in the UK and is often associated with quality and reliability.

"This transition will lead to a positive impact for our customers, allowing us to build on our position as a market leading supplier of submersible and engine driven pumps, nevertheless, it is very much business as usual."

Obart Pumps in Maidstone, UK: the long-time distributor changed its name to Tsurumi Pumps UK and is now the Japanese manufacturer's sixth sales company in Europe. PHOTO: TSURUMI



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Growth from a record

Last year's ICON 200 – originally published by *International Construction* magazine – saw record sales – this year's table manages to surpass it.

It is becoming a cliché to talk about how resilient the construction industry is in the face of a raft of challenges – inflation, skills shortage, supply chain disruptions – but that doesn't make it any less true. The latest edition of the ICON 200 provides yet more ammunition for this viewpoint: sales have hit their highest ever level at US\$2.028 trillion.

This figure is not quite as outlandishly high when you consider that last year's ICON 200 total was US\$1.968 trillion. That this year's list (which looks at sales for 2022) is at a record-high is due to a number of factors, but one is more prominent than the others: China.

China-based contractors account for approximately 44% of the total amount. To put that into context, the country with the next highest percentage is the US with 13.7%. The results of the number one company on this list are remarkable. China State Construction & Engineering (CSCEC) had sales in 2022 of US\$303 billion – almost double that of the second placed contractor. On this year's Fortune Global 500 list CSCEC rose to ninth position from 13th in 2021.

The top five places on the list – like last year – are all taken up by Chinese contractors. All five of these companies saw their sales increase, albeit some by a few percentage points. The performance of these contractors underlines the strength of the country's Belt and Road Initiative around the world as construction activity in China itself in 2022 was down.

“Some of the biggest upwards movers on the list have been from those firms involved in the sector of home building.”

	SALES (US\$ MILLION)	COMPANY	COUNTRY	LAST YEAR	CHANGE	WEBSITE
1	303,448	China State Construction & Engineering (CSCEC)	China	1	-	www.cscec.com.cn
2	171,424	China Railway Group	China	2	-	www.crec.cn
3	162,185	China Railway Construction Corporation	China	3	-	www.crcc.cn
4	106,546	China Communications Construction	China	4	-	www.crbc.com
5	87,735	Metallurgical Corporation of China (MCC)	China	5	-	www.mccchina.com
6	64,853	Vinci	France	6	-	www.vinci.com
7	46,606	Bouygues' Construction Divisions	France	7	-	www.bouygues.com
8	35,347	ACS	Spain	9	1	www.grupoacs.com
9	34,041	Shanghai Construction Group	China	8	-1	www.scg.com.cn
10	33,709	Lennar	US	11	1	www.lennar.com
11	33,480	D R Horton	US	10	-1	www.drhorton.com
12	27,570	Hochtief	Germany	12	-	www.hochtief.de
13	23,324	Larsen & Toubro E&C	India	15	2	www.larsentoubro.com
14	22,279	Sekisui House	Japan	13	-1	www.sekisuihouse.co.jp
15	21,942	Eiffage	France	14	-1	www.eiffage.fr
16	19,385	China Gezhouba	China	19	3	www.cggc.ceec.net.cn
17	18,192	Kajima Corporation	Japan	16	-1	www.kajima.co.jp
18	17,902	Strabag	Austria	17	-1	www.strabag.com
19	17,600	Bechtel*	US	27	8	www.bechtel.com
20	16,437	Hyundai Engineering & Construction	South Korea	21	1	www.hdec.co.kr
21	16,229	PulteGroup	US	24	3	www.pultegroupinc.com
22	15,969	Skanska	Sweden	20	-2	www.skanska.com
23	15,091	Obayashi	Japan	18	-5	www.obayashi.co.jp
24	14,886	Jacobs Engineering	US	22	-2	www.jacobs.com
25	14,710	Shimizu Corporation	Japan	25	-	www.shimz.co.jp
26	13,744	Fluor*	US	26	-	www.fluor.com
27	13,022	China State Construction International Holding	Hong Kong	30	3	www.csci.com.hk
28	12,496	Taisei Corporation	Japan	23	-5	www.taisei.co.jp
29	11,934	Doosan Heavy Industries & Construction	South Korea	33	4	www.doosanheavy.com
30	11,772	Acciona	Spain	34	4	www.acciona.es
31	11,076	Emcor Group	US	32	1	www.emcorgroup.com
32	10,494	Saipem	Italy	42	10	www.saipem.it

position

	SALES (US\$ MILLION)	COMPANY	COUNTRY	LAST YEAR		WEBSITE
				CHANGE		
33	10,409	Peter Kiewit*	US	29	-4	www.kiewit.com
34	10,348	NVR	US	38	4	www.nvrinc.com
35	10,275	Toll Brothers	US	37	2	www.tollbrothers.com
36	9,750	Whiting-Turner Contracting*	US	36	-	www.whiting-turner.com
37	9,588	Takenaka Corporation*	Japan	28	-9	www.takenaka.co.jp
38	9,518	GS Engineering & Construction	South Korea	45	7	www.gsconstir.co.kr
39	9,401	Balfour Beatty	UK	31	-8	www.balfourbeatty.com
40	8,531	Spie	France	41	1	www.spie.eu
41	8,102	FCC	Spain	46	5	www.fcc.es
42	8,063	Daewoo Engineering & Construction	South Korea	47	5	www.dwconst.co.kr
43	8,050	Webuild SpA	Italy	51	8	www.impregilo.it
44	7,940	Ferrovial	Spain	43	-1	www.ferrovial.es
45	7,814	Haseko	Japan	40	-5	www.haseko.co.jp
46	7,781	Samsung Engineering	South Korea	55	9	www.samsungengineering.co.kr
47	7,361	VolkerWessels*	Netherlands	44	-3	www.volkerwessels.com
48	7,071	DPR Construction*	US	53	5	www.dpr.com
49	6,959	Bam Group	Netherlands	39	-10	www.bam.nl
50	6,903	KB Home	US	64	14	www.kbhome.com
51	6,717	CIMIC Group	Australia	50	-1	www.cimic.com.au
52	6,694	TechnipFMC	UK	56	4	www.technip.com
53	6,564	KBR	US	49	-4	www.kbr.com
54	6,490	Barratt Developments	UK	54	-	www.barratthomes.co.uk
55	6,292	Meritage Homes	US	70	15	www.meritagehomes.com
56	6,257	McDermott International	US	60	4	www.mcdermott.com
57	6,223	Lendlease Group	Australia	48	-9	www.lendlease.com.au
58	6,152	Sacyr Vallehermoso	Spain	66	8	www.sacyr.com
59	6,120	Peab	Sweden	52	-7	www.peab.se
60	6,084	Porr	Austria	59	-1	www.porr.at
61	5,740	SNC-Lavalin	Canada	63	2	www.snc-lavalin.com
62	5,664	Daelim*	South Korea	35	-27	www.daelim.co.kr
63	5,548	Gilbane Building	US	65	2	www.gilbaneco.com
64	5,500	M.A.Mortenson*	US	68	4	www.mortenson.com
65	5,445	Taylor Wimpey	UK	61	-4	www.taylorwimpey.com
66	5,356	NCC Group	Sweden	57	-9	www.ncc.se
67	5,344	Hensel Phelps*	US	62	-5	www.henselphelps.com
68	5,157	Maeda Corp	Japan	58	-10	www.maeda.co.jp

How the table is compiled

The league table is a ranking of the world's largest construction companies, based on their sales figures for 2022 – either full or financial years, depending on the individual accounting practices of the companies in question.

It is compiled from a range of sources, including audited annual accounts, companies' own statements of revenues and reputable third parties, such as Factiva. In some cases ICON has estimated the revenue – in all of these cases this is highlighted with an asterisk.

The ranking is based on sales in US dollars – the exchange rate for all currencies used has been compiled and averaged.

While every care is taken to ensure that the information in the ICON Top 200 league table is accurate, ICON can not be held responsible for inaccuracies or errors. If your company should be included in the league table, or the information supplied is not correct, then contact ICON's editor, Andy Brown, at: andy.brown@khl.com

Vinci is the first European contractor on the list, holding steady in sixth position. Fellow France-based contractor Bouygues is in seventh and then comes the first movement in the top ten, with ACS rising from ninth last year to eight. The Spain-based contractor swaps places with the Shanghai Construction Group which fall from eight to ninth due to its sales declining. US-based residential developer Lennar rounds off the top ten, swapping placed with DR Horton, another US-based housebuilder.

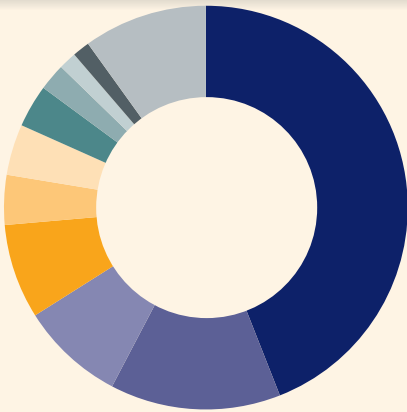
Some of the biggest upwards movers on the list have been from those firms involved in the sector of home building, with US-based KB Home and Meritage Homes rising 14 and 15 places respectively. Several firms drop out of the table due to going out of business, such as Australia-based Clough.

Eye on the future

That the total of the ICON 200 has increased from last year's record high despite the relative weakness of construction in China is a testament to the global strength of the market. Other countries, such as the US, made up for this decline and, with China abandoning its zero Covid policy, domestic sales for its contractors will surely be better in 2023 than in 2022.

Issues remain for the industry and at the front and centre are rising prices and a lack of workers. Inflation remains high globally – the International Monetary Fund predicted that global headline inflation in the baseline is set to fall from 8.7% in 2022 to 7.0% in 2023 on the back of lower commodity prices but underlying (core) inflation is likely to decline more slowly. Inflation's return to target is unlikely before 2025.

The lack of workers remains a real issue. For example, in the US the Associated General Contractors of America found that despite nearly two-thirds of metro areas adding construction jobs in the last 12 months, the total would have been higher if contractors could find



China	44.0%	South Korea	3.4%
US	13.7%	Germany	2.2%
Japan	8.3%	Sweden	1.4%
France	7.6%	Italy	1.4%
UK	4.0%	Others	9.9%
Spain	4.1%		

Analysis by country

Whichever way you look at it, it is clear that Chinese contractors are the driving force behind the sales of the ICON 200. There are nine Chinese contractors on the list – two of them increase their placing, six stay the same and just two of them drop a position.

Between them, these nine contractors generate an incredible amount of money – US\$893 billion. Put another way – they account for 44% of the total amount of the ICON 200. This is the same percentage as last year and shows how strong these contractors are globally that they can keep the same figure despite construction activity in China falling in 2022.

The US and Japan have the joint highest number of contractors, with 33 each. However, those from the US generate considerably more money at US\$277 billion (13.7%) of the total compared to Japan's US169 billion (8.3%). France, with just eight companies on the list, almost generates as much money as Japan, with France-based firms totalling US\$153 billion (7.6%).

US-based contractors had a strong year in 2022; of the 33 companies 21 saw their placings increase, three stayed the same and nine fell. The percentage total of 13.7% is an increase on last year's 12.5%. The results of Japan-based companies are in stark contrast, with 21 of the country's contractors dropping down the rankings, two holding steady, and just two seeing their placings increase.

Next there are three European countries: France, UK and Spain. France only has eight contractors on the list, but they generate US\$153 billion, with Vinci accounting for US\$64 billion of this. The UK has the third highest number of contractors on the list at 23 but these generate the (relatively) small sum of US\$80 billion – this is less than the US\$82 billion from Spain's eleven contractors.

There is only one contractor from South America on the list, from Brazil, and two from India. There are none from Africa or the Middle East.

	SALES (US\$ MILLION)	COMPANY	COUNTRY	LAST YEAR CHANGE		WEBSITE
69	4,701	Persimmon	UK	72	3	www.persimmonhomes.com
70	4,634	Kinden	Japan	69	-1	www.kinden.co.jp
71	4,628	Ackermans & van Haaren	Belgium	71	-	www.avh.be
72	4,617	JGC	Japan	90	18	www.jgc.com
73	4,575	Nexity	France	67	-6	www.nexity.fr
74	4,534	Bilfinger	Germany	82	8	www.bilfingerberger.de
75	4,451	Tecnicas Reunidas	Spain	105	30	www.tecnicasreunidas.es
76	4,451	Morgan Sindall	UK	81	5	www.morgansindall.co.uk
77	4,412	Lotte Engineering & Construction	South Korea	80	3	www.lottecon.co.kr
78	4,374	McCarthy Building*	US	75	-3	www.mccarthy.com
79	4,357	Bellway	UK	85	6	www.bellway.co.uk
80	4,254	China Railway Erju*	China	126	46	www.crec.com.cn
81	4,206	Ed Züblin*	Germany	74	-7	www.zueblin.de
82	4,200	J.E. Dunn Group*	US	84	2	www.jedunn.com
83	4,195	Parsons Corporation	US	96	13	www.parsons.com
84	4,158	Sinohydro*	China	73	-11	www.sinohydro.com
85	4,137	M/Ihomes	US	92	7	www.mihomes.com
86	4,120	Kandenko	Japan	78	-8	www.kandenko.co.jp
87	4,117	Toda	Japan	77	-10	www.toda.co.jp
88	4,020	Veidekke	Norway	83	-5	www.veidekke.no
89	4,000	Mota-Engil	Portugal	114	25	www.mota-engil.pt
90	3,969	Brasfield & Gorrie* (ok JL)	US	86	-4	www.brasfieldgorrie.com
91	3,873	Kier Group	UK	79	-12	www.kier.co.uk
92	3,820	Penta-Ocean Construction	Japan	87	-5	www.penta-ocean.co.jp
93	3,790	Tutor Perini	US	76	-17	www.tutorperini.com
94	3,762	Boskalis Westminster	Netherlands	100	6	www.boskalis.com
95	3,732	Implenia	Switzerland	88	-7	www.implenia.com
96	3,729	Enka	Turkey	123	27	www.enka.com
97	3,628	Keller Group	UK	115	18	www.keller.co.uk
98	3,623	Walsh Group*	US	98	-	www.walshgroup.com
99	3,607	Aecon Group	Canada	111	12	www.aecon.com
100	3,599	Maire Tecnimont	Italy	104	4	www.mairetecnimont.com

qualified workers.

Residential construction has been a driver for many of the contractors on the list and there are fears that in some major markets this sector could decline.

Despite some dark clouds on the horizon, the overall picture remains bright. Construction is an essential industry and Governments around the world are showing little let-up in their desire to commission large infrastructure projects. Last year it was predicted that this year's table would see a small decline, a 'soft landing', but instead the ICON 200 grew from what was a record amount. One would expect for the table next year to remain at roughly the same level but, such is the strength of the sector, another rise can't be ruled out.

IRN

Extended list

The full 200-strong listing and extended coverage can be found in the July-August 2023 edition of *International Construction* magazine.





THE POWER TO BRING RESULTS

The 970E is equipped with a Cummins QSX15 engine and worldleading components. With stable quality, high efficiency and durability, it can easily handle various harshworking conditions. The 970E uses electronically controlled high-pressure monoblock pump technology, which is highly adaptable to oil products and has higher reliability. The variable-track travel frame can quickly adjust the width of the travel frame according to operational requirements.



The aerial work platform (AWP) market holds huge potential, particularly in some key emerging nations. Euan Youdale reports on some of them.

Powered access equipment is well established in a number of key markets, notably Europe and North America but has some way to go in many parts of the world before it is considered standard on construction and industrial worksites.

There are a number of reasons for this, most of which hang around the concept of safety. Access equipment, in its capacity as a safer option compared to more rudimentary solutions in emerging markets, like bamboo scaffolding, often grows in line with the development of safety standards.

Other key factors are vital too, ahead of the adoption of powered access equipment, including a rise in the cost of labour and the development of a rental market. Hence, an emerging nation for access equipment is often far more established when it comes to other construction equipment.

Chinese growth

If there is one country that embodies these conditions, it's China. The powered access industry has been waiting for an explosion and many still expect this to happen despite slowdown in the construction market.

"If you compare and contrast from a couple of years ago access has really grown in China. You can feel the



Chinese rental company Horizon took delivery of the first 185ft working height 1850SJ Ultra Boom in the country. The company's president Jiayin Wang (left) and JLG Industries' president Frank Nerenhausen (right) marked the occasion at Bauma China 2014.

Pushing the

exponential growth starting," says Alan Loux, vice president of global marketing at JLG. "The construction business in China is down, we are not. We are underdeveloped."

The term 'exponential growth' has been linked to China for some time, and it has the biggest aerial work platform manufacturing base outside Europe and North America, with as many as domestic 80 producers. A more general view is that exponential growth is unlikely in the immediate future although the sector will grow at a high percentage rate, albeit from a relatively low base.

Putting that in to context, the International Powered Access Federation's (IPAF) latest rental reports show The Chinese AWP rental market grew at a rate of 25% to 30% in the past two years to reach approximately 9000 units.

That compares to the world's biggest aerial work platform market the USA, which recorded an expansion of 7% in 2014 to exceed 500000 units.

Some of the most positive voices can be heard from the two biggest access manufacturers, JLG and Genie, both of which have production plants in the country.

As Mr Loux points out, every market is different, potentially requiring unique products in those markets. "We should look at each market and see what it needs, some products will be similar and some very different."

For example the manufacturer's R6 and R10 RS (Rental Spec) scissors, with working heights of 19ft and 32ft, respectively, now have the addition of active pothole protection for the Asian market. Previously RS scissors only offered passive pothole protection. They will be produced at JLG's facility where, in the future, Mr Loux says, there will be an increasing number of region-specific products.

The forecasted growth in China's construction sector must be matched by an increased focus on improving health and safety standards. That is the view of Terex China president Ken Lousberg.

He confirms there are three factors that will influence the region's ability to deliver high levels of growth within construction. This includes the promotion of a workplace safety culture with regulations that are enforced to improve operating environments.

Secondly, he says construction job efficiency and productivity would be enhanced through companies adequately investing in equipment such as aerial work platforms over basic scaffolding, which would have a positive effect on standards within the rental sector.

The final element, he says, is ensuring availability of products, which remained a crucial factor within the industry.

Consequently, he adds that pursuing this policy led to Terex's decision to invest between US\$100 million (€80 million) and US\$200 million (€161 million) in new production facilities in China.



Manitou's latest boom, launched at Intermat, is the 11.91m working height Man'Go 12. It weighs 4.1 tonnes, while capacity is 230kg in the basket.

Slow progress

Skyjack, one of the 'big four' manufacturers, is more tentative in its approach to China and has chosen not to open a factory in the region. Brad Boehler, the company's president, cites the challenging rental model and 'difficult payments' as two reasons why progress in the country is slow. "All this needs to come together for it to work. And when the government decides it wants something to happen, then it does."

If demand suddenly rises and machines are required then Skyjack will bring them in, explains Mr Boehler. The plan for now is to place equipment in the market and be seen as a viable alternative.

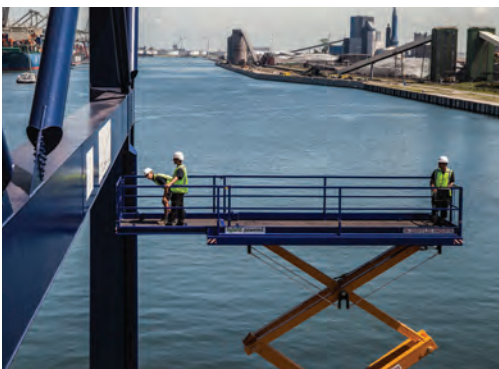
Will Skyjack introduce a plant there in the future? The fact is, says Mr Boehler, the higher the labour rate goes, the less attractive it becomes to manufacturer in the country. "There are lots of manufacturers relocating back to the USA or other parts of the world because of the labour rate.

"Perhaps we will manufacturer in Australia or somewhere like that and bring the products in." But he adds that if China does pick up it is likely Skyjack will start manufacturing somewhere in the region.

Emerging markets

The present population of aerial work platforms in India is a little above 5000 units. Thirty percent of them belong to end users for maintenance jobs while the

boundaries



Holland Lift's 27m working height M-250HYL254WD/P/N scissor was launched at APEX in June last year. It is the manufacturer's first hybrid machine, with a 1000kg capacity and can drive at full height and weighs 25 tonnes.

Built in Europe at Genie's facility to suit the needs of European customers, The 12m working height all-electric Z-33/18 is its first model to be designed and manufactured outside the USA. It is presented at Genie's first test site outside North America in October.

other 70% belong to rental companies supplying the industrial, infrastructure and commercial residential construction sectors.

Growing awareness of the equipment's effectiveness has resulted in increasing demand from industrial construction and general infrastructure projects. Enthused by this emerging demand, small, medium and even some big rental companies are starting to buy large amounts of used equipment - a sure sign of an emerging market.

Mr T Mohanraj, business head, TV, Sundaram Iyengar & Sons, JLG and Palfinger dealer for the south and east Indian market, says, "Unlike India, the global AWP business is driven by rental agencies through new equipment. In contrast, in India, the preference of rental companies has generally been to acquire used equipment."

OEM's are extolling the benefits of buying new equipment. He adds, "Parts and training support and rental fleet management are other important requirements of the rental agencies. Fleet management services have been gaining popularity among rental companies and industrial end users for maintenance requirements as it ensures higher equipment availability and a better return on investment."

There is also growing demand for telescopic and articulated booms and scissor lifts from medium and large industrial project owners and construction companies. According to industry estimates, demand for new equipment across these categories grew to 235 units in 2014, compared to 200 units in 2013 in India.

This is expected to grow further in 2015, as state-owned Indian Oil Corporation Limited (IOCL) has a major maintenance programme for its refineries across India. Demand for new equipment is also expected from India's largest private refinery company Reliance for its ongoing third phase expansion of the Jamnagar refinery in Gujarat, Western India.



Palfinger Platforms extended its jumbo NX class range with a bigger model at Intermat, the 55m working height P550. It follows the P480, the first in the new NX series launched at APEX last year.

As a result, rental companies across Asia are growing in size and numbers. There are now a good number of rental companies with fleets of more than 1000 units and above in the likes of Singapore, China, Hong Kong and South Korea. They will tell you that local knowledge is key to success.

One of those, AJ Networks is based in South Korea, one of the most established markets in the region. It has about 4000 aerial work platforms in its fleet, 90% of which are scissor lifts, with 3% being articulating booms and the remaining 7% telescope booms.

Key to success

The rise of access platforms in South Korea is not just down to recognition of safety and the expected rise in the cost of labour, there is also the key issue of, "Our society is aging, so the labour power is growing old, therefore AWP's will be used more and more."

"Secondly, however, our government is thinking about safety and regulations will become stricter."

He estimates there are around 35000 aerial work platforms in South Korea; in Vietnam that drops to about 3000, although the market is set to grow quickly.

Asked how the adoption of AWP's in South Korea is changing, Mr Son says, "Five years ago the total fleet in the country was about 16000 or 17000 units. In five years the market size will double from where it is now."

Of the machines in South Korea more than 90% are owned by rental companies, says Mr Son. "The reason behind this high percentage is that it is the rental industry that is creating the market, it is the rental companies that introduced the AWP's into the market."

Room for growth

There is no doubt then that Asia has a great deal of potential. An area with starker contrasts can be found in Europe where the difference between established markets to the western side is considerable when compared to those based in the east.

Certainly, from the perspective of the AWP industry, Poland is by far the most mature compared to its eastern European counterparts and is moving closer to the countries on the western side of Central Europe. Nevertheless, Poland is still an emerging nation. Its rental sector is growing some 20% to 25% a year.

Most manufacturers and rental companies in the industry say they are keeping at least one eye on the eastern countries. For example, Riwal and Prangle have signed a five-year framework agreement across Austria and eastern Europe. Part of the agreement is a three-year rental deal for 79 JLG platforms and telehandlers. Prangl will rent the machines to customers in Hungary, Romania, Bulgaria, Slovakia and the Czech Republic.

Turning to OEMs, Co.Me.T, is exhibiting in Poland and Romania. "We are trying to develop that market and looking for a dealer there," says a spokesperson.

Vehicle mount manufacturer France Elévateur shares a similar story and is making a concerted effort in Poland with its distributorship partner Kobcrane. "This part of Central Europe is not easy because of the price level," says Laurent Leclerc, special equipment department manager. "The idea is to design machines for this market. The goal is not to sell French machines around the whole world as the price is too high." This will culminate in a new range of van mounts on 3.5 tonne chasses aimed at Central Europe and France.

Despite such valiant attempts in the region, the challenge remains significant. Daniel Duclos, owner and chairman of French manufacturer ATN says, "What we produce is more for a mature market, It will take



The 86ft working height SJ 86T boom made its European debut on the Skyjack stand at Intermat and is its largest boom to date. The machine was launched two months earlier at the Rental Show in the USA.

a few years for these markets to change, but it will take less time to educate these markets than it took to educate the established markets as the products already exist and can be seen to work."

Mr Duclos says aerial work platforms are already being introduced in to such markets through construction companies that work globally and insist on using such machines on their worksites.

Phil Graysmark, vice president of sales at Genie Industries, says there are two main issues in the eastern area. Firstly, it is not used to the rental model, and, more fundamentally, there is a lack of understanding about aerial work platforms and their use.

The second issue is funding. Finance companies often

don't have the knowledge of the equipment from a rental and asset view and don't want to fund them.

One might think Chinese OEMs of AWP's are taking advantage in these areas due to their products' lower cost. But according to Mantall's general manager, the China-based OEMs are experiencing the same issues. "It's not a great market. We have some cooperation in Hungary and Poland but it is slow as the AWP market is still developing there."

The relative youth of Chinese manufacturers is also a factor. "There are not many Chinese machines there. Chinese equipment has only been around for five to 10 years so there has not been much time to build up a used equipment base."

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INTERNATIONAL rental CONFERENCE ASIA

China and the wider Asian markets are among the fastest growing in the world. At the International Rental Conference (IRC) this October, equipment rental experts from across Asia and Europe will provide market advice and sector information covering technology, safety, training and much more.

IRC: Focus on Asia

The largest conference in China dedicated to the equipment rental industry returns on 23 October, a day before APEX Asia and CeMat Asia. Taking place at the Jumeirah Himalayas hotel in Pudong, the IRC 2023 is the tenth instalment, and the first since 2021.

Topics and speakers for IRC 2023 include:



TEI GYOMEI
Managing director, Hitachi Construction Machinery Distribution (China) Co., Ltd.

Mr Tei is an experienced construction equipment and rental executive with extensive knowledge of Asia Pacific, China and Japanese markets.

At IRC, he will report on rental asset planning management.



PAUL RANKIN
COO, Loxam Powered Access division

Paul Rankin joined the Lavendon Group in 2014 as Managing Director of Rapid Access, based in the UAE, before moving to the position of Chief Operating Officer for Loxam's Powered Access Division in 2020, covering the UK, Europe & Middle East.

At IRC, Rankin will look at the key aspects that form a powered access rental business.



PETER DOUGLAS
CEO, International Powered Access Federation (IPAF)

Peter Douglas is the CEO of the International Powered Access Federation (IPAF), which is the leading authority worldwide on the working at height sector, representing the interests

of users, buyers and manufacturers of aerial work platforms.

He will discuss the role that e-learning has in aerial platform training.



CHAI ZHAO YI

Managing director, Shanghai Panguan and managing director and vice chairman of Shanxi Construction Machinery

Chai Zhao Yi founded Shanghai Panguan in 1998 and it is now China's largest tower crane rental company, and the second largest equipment rental company in China. It has a fleet of more than 13,000 units operating throughout China. He is also managing director and vice chairman of Shanxi Construction Machinery, which acquired the company in 2015.

Mr Chai will report on how collaboration can help to build a healthy environment in the Chinese rental industry.



CHI SEN GAY

Senior vice president, Asia Pacific & Japan, Trackunit Asia Pacific

Chi Sen joined Trackunit in 2021 to spearhead its global expansion into the Asia Pacific region. His mission is to collaborate with industry leaders to eliminate equipment downtime for the construction industry, through the use of data and IoT.

Chi Sen will provide insights into connecting customers and machines through data.



ZENG GUANG'AN
Chairman of Liugong

A senior figure in China's construction equipment industry, Mr Zeng is chairman of Guangxi Liugong Machinery Group

Co., Ltd. He is an engineer by profession and became its chairman in 2014.

Mr Zeng will explore the role that technology has to play in the rental industry, with particular focus on green powers.



HAN XIAO MING

Chairman, Shijiazhuang Tianyuan Technology Group Co., Ltd and president, industrial internet branch of China Construction

Machinery Association

In addition to his leading role at Tianyuan, Mr Han is also President of the Industrial Internet Branch of the China Construction Machinery Association (CCMA).

Mr Han will focus on the future of the rental industry and the role in which technology will play. **IRN**

Event details

WHAT: 10th International Rental Conference (IRC)

WHEN: 23 October 2023 (the day before APEX Asia and CeMat Asia)

WHERE: Jumeirah Himalayas Hotel, Pudong, Shanghai, China

WHO: Organised by International Rental News and supported by IPAF and the Rental Branch of China Construction Industry Association.

CONTACTS: In China: Cathy Yao, E-mail: cathy.yao@khl.com Outside China: Murray Pollok, E-mail: murray.pollok@khl.com

WEBSITES:

www.khl-irc.com, www.apexasiashow.cn, <https://apexasiashow.com>, www.cemat-asia.com

Diverse solutions

APEX Asia will be an important indicator of not only the domestic China market, which is fast becoming one of the most advanced in the world, particularly when it comes to the likes of charging infrastructure for electric lifts, which is growing at a quicker rate than most other countries.

It will also be interesting to discover the products that exhibitors will be introducing at the show. Here follows some of the MEWP models, set to join a vast range of components on display in the APEX Asia hall.

Alternative power

LGMG will concentrate on electric, oil-free solutions, with the launch of the zero hydraulic, all-electric S0607PE slab scissor, with electromechanical actuators that replace the hydraulic lift system.

A new control system has been developed for smooth operation, alongside a range of automatic configuration settings.

The new electric SR1623E RT scissor offers the same advantages as the S0607PE, with all electric components, brushless motors, with a high protection level.

LGMG's articulating AR24JE boom lift incorporates lithium batteries, low noise, zero-emissions and high-capacity. The axle-integrated four-wheel drive system comes with three steering modes: front-wheel, crab

Euan Youdale reports on the OEMs and products that will be on show at APEX Asia, taking place in Shanghai in October.

Dingli's heavy load capacity, lithium battery-powered BT44ERT.



and four-wheel steering, to meet the demands of operations in narrow spaces. There is also a high strength anti-torsional frame to satisfy container transportation conditions.

One of China's oldest specialist MEWP manufacturers **MANTALL** will be at the show with its latest hybrid articulated boom lifts, the 17m working height HZ170JH and new 20m working HZ200JH.

The HZ170JH features a 300kg basket capacity, four-wheel drive, AC motor drive, automatic levelling, proportional control, fault

diagnosis system, tilt alarm, weighing system, foam tyres and a 1.83m x 0.76m platform.

The hybrid system comes standard with lead acid batteries, with lithium batteries being an option.

The dual capacity HZ200JH has a 300kg unrestricted and 454kg restricted load capacity and offers the same features as described for the HZ170JH.

HAULOTTE will showcase its 8m working height Optimum 8 electric scissor, alongside the 16m working height Sigma16 electric articulating boom and 28m HT28RTJO diesel engine-powered telescopic boom.

The manufacturer has chosen these three products as the best performers for Haulotte in China, and that are produced in its facility in the country. The aim of the French manufacturer's presence at the show will be to demonstrate its 'in China, for China' philosophy, in terms of equipment and service.

ROSHOW HEAVY INDUSTRY (RHI), is a subsidiary of Roshow Group. RHI is focusing on direct electric drive scissor lifts and electric-powered boom lifts on its stand. The company boasts reliable and easy to operate equipment that are aimed at a high residual value, it says.

Among the range is the 12m working height RS1212HD and 8m working height RS0608HD slab scissors and the articulating 16m and 18m working height RSA16E and RSA18E boom lifts.

China's largest access specialist **DINGLI** will launch a mini electric articulated boom lift, the BA11NE, alongside a range of its existing equipment, at the show. This includes its Modular Electric Boom Lifts series, with 85% shared components across the series, zero emissions, and suitable for standard container transportation.

The company's electric rough terrain scissor lifts will make a showing too, equipped with a high capacity battery pack, zero emissions and strong RT four-wheel drive performance.

Event details



WHEN: 24-27 October 2024
WHERE: Shanghai New International Expo Centre (SNIIEC), China

www.apexasiashow.com



WHEN: 23 October 2024 – the day before APEX Asia starts

WHERE: Jumeirah Himalayas hotel, Shanghai China

www.khl-irc.com

XCMG Fire-fighting Safety Equipment will be on show with its wide range of access equipment.



The 12m working height RS1212HD and 8m working height RS0608HD slab scissors from Roshow Heavy Industry.





Haulotte's equipment on show are all produced in China.

suction cups and wireless remote control, alongside millimetre precision, says the company.

Versatile units

Canada-based **SKYJACK** will be promoting its new China production facilities. Adjacent to parent company Linamar's plant, the Skyjack factory will manufacture scissor and boom lifts and serve the Chinese market, as well as Japan, South Korea, Southeast Asia, Australia and Europe, among others.



Skyjack will exhibit its SJ3219 DC electric scissor, as well as other models in the DC range.

HERED INTELLIGENT TECHNOLOGY will show a 9m articulating boom lift, 6m mast lift, 21m articulating boom lift and a 22m telescopic boom.

TROJAN will launch its 29TM-AGM battery, with a 110Ah@20Hr capacity. It is made of Polypropylene with no leakage

and is maintenance-free.

Also on show will be the AGM series of adsorption glass fibre separator batteries and deep cycle flooded batteries. The company's Lithium-ion batteries will also be there with a faster charging time and longer usage.

Chinese battery producer **QUIMO** will show products from its range. As a hint the company says, "Most users lack maintenance knowledge or are unwilling to maintain batteries themselves. Rental companies have a wide distribution of MEWPs, making battery maintenance inconvenient or costly. Therefore, rich liquid batteries with high requirements for use and maintenance will be gradually replaced."

COBO will present its new sensors line including inclinometers, inertial modules, rotary, linear, forces, sonar and radar.

IRN

The AC slab scissors are equipped with fully sealed AC system, replacing the traditional DC system to make them more efficient and safer.

Dingli's fully electric mini scissors are equipped with a large hub, and are compact, light and easy to transport.

Then there will be the Electric Glass Attachment Boom Lifts with a 1500kg section tool, zero emission and eight independent



Jovoo's 20m working height electric articulated boom.

Skyjack will also be exhibiting its range of DC electric scissors, the SJ3215, SJ3219 and SJ4732 at the show.

The DC scissors offer working heights from 6m to 11.75m.

All Skyjack electric scissors come with solid rubber non-marking tyres and the manufacturer's simple to use control system.

JOVOO INDUSTRIES will present a new 20m working height electric articulated boom lift and an 18m electric telescopic boom. The V20 offers a dual load capacity of 230kg/350kg and is equipped with automatic boom lowering, four-wheel drive and strong climbing ability. The J18 electric telescopic boom lift also has four wheel drive, automatic lowering.

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Almost two years have passed since CNH Industrial unveiled its ambitious plans for a rental and used equipment programme with Case Construction dealers. Designed to cover regions spanning North and South America, Europe, South Africa, Australia, and New Zealand, the initiative encourages dealers to not only offer Case equipment for rent but also sell certified used Case machinery.

The programme made its official debut last year in Germany through its subsidiary, signaling the company's ambition to establish a strong presence in the global rental market.

Building on this momentum, in February, the programme expanded its reach to Case Construction-owned stores in France and South Africa. Additionally, Case Power Lease introduced the availability of D Series and E Series excavators for rental in North America in May.

During an interview at Case Construction's Roadshow, Graziano Cassinelli, global head of rental and used equipment at CNH Industrial, shed light on the reasons driving the rental push, the role of dealers and his insights into the future of electrification in construction equipment.

Rental focus

It was certainly timely that *IRN* was invited to Case's Roadshow in Derby. It was here that some of the company's dealers gathered to see the latest equipment from the OEM, including the CX75E 7.5 tonne excavator with a 2 piece boom.

The machine is powered by a Kubota Stage V engine that provides 44.3kW of power. Elsewhere, the WX140E wheeled excavator, part of its E-Series, attracted plenty of attention from dealers.

While the equipment was high on the agenda for dealers, Cassinelli was keen to discuss the role they will play in the company's rental programme moving forward. "We are working with the regional management teams to get all dealers engaged in this new venture as well as contacting new customers", says Cassinelli, who joined CNH in 2021.

To prepare dealers for the initiative, the company has given them the tools and guidance to provide a rental service in the regions in which they cover.

Cassinelli describes this as a "change of mindset" for dealers, who will rent machines to the end customer as well as rental companies, alongside its role of selling machines to rental companies.

Aside from this, a significant role of the dealer will see them communicate with companies to determine what specifications are required, with versatility and low cost both factors that Cassinelli believes will be key.

Cassinelli says, "We have a high technology product, especially on mini and midi excavators with zero tail swing, luxury cabs and features that this kind of company doesn't require. To penetrate the independent rental company, you need the right product.

"Some companies will require a lot of specifications, others will require very standard machines, but the idea is to prepare essential equipment just in case they want to apply optional features." Cassinelli tells *IRN* that these "essential machines" will come in the near future.

Long-term solutions

The question that naturally arises is, why is the company making the move into rental now? Cassinelli's response was clear; "Because it's growing day by day. It's slightly growing, but growing day by day", he says.

"15 years ago everybody was thinking that rental in ten years would occupy 50% of the total production. That's not happened because the trend was less than what was forecast. But the trend is continuously

Graziano Cassinelli,
global head of
rental and used
equipment at
CNH Industrial,
updates *IRN* on
the company's
rental push.

A change of mindset

As well as the 1021G wheel loader (back) the company also previewed its prototype electric compact wheel loader (front).





“ We need to support the dealers to make the move into rental now. ”

GRAZIANO CASSINELLI,
global head of rental
and used equipment
at CNH Industrial.

growing. It won't take 5 years, maybe it will take 10 years to be at 50% in the mature markets.

“We need to support the dealers to make the move into rental now because they need to have it as part of their proposition. Dealers cannot think in the future to stay as they

are today, as a retailer that buys and sells.”

Another key aspect of the programme is the residual value of machines as at the end of the rental period, customers will have the option to buy the machines. “You have two possibilities in keeping the residual value”, Cassinelli says. “First, have a very high brand recognition in the market, or support the residual value financially. We have some parts of the world where our brand is recognised as a premium brand, the residual value is a consequence of this.

“In other parts of the world we have just penetrated the market. We are not well-known and in this case in many negotiations we face the request from the

How the programme works

As part of the programme, dealers are encouraged to rent CNH Industrials range of Case equipment and sell certified used Case machines. The finance for the dealers is provided by CNH Capital, the finance arm of CNH.

CNH Capital holds machines on its balance sheet to be rented to dealers and end customers. In some markets the scheme differs. For example, France and Italy require the dealer to provide the end user with the equipment, while in other countries machines can be rented directly from CNH Capital.

The company is also in the process of testing and launching a pay per use platform. Cassinelli says that thanks to built in telematics, machine usage can be tracked, “We finance the machines and provide a very low monthly rate, but you as a dealer or a client pay based on your use.

“This is one of the tools that we are putting in place that demonstrates that we believe in that sector, we believe in rental.”

company or from the customers to have the requirement that we usually sort out using our capital company.

“So, we provide financing (through CNH Capital) and in some specific cases we provide a residual value guarantee for the machines that are financed from us.”

Dealer optimisation

Cassinelli, who is also head of sales for European construction brands for CNH, says he doesn't expect any increases in terms of the number of dealerships the company has, which currently stands at more than 200 globally. However, the company is optimising and supporting dealers. He says, “We are helping our dealers to get their activity together as much as possible.

“In some cases, we have dealers that we want to grow and some other dealers that we are not aiming to grow. Maybe we are aiming to improve their efficiency on the territory, but without extending territorial coverage. I would call this more optimisation.

“Some of them need fine tuning and support, while others need to start from scratch. There are different dealers in the Case network that require a different kind of customised support or plan to develop rental.”

He goes on to say he is “very convinced” that dealers and customer proximity remains the Caes's most important asset which will play a key role in the success of the programme.

Looking ahead, Cassinelli expects the company to strike a balance in its rental strategy, avoiding radical changes and maintaining a measured approach.

The future of construction equipment

Halfway through the interview, the conversation turns to electrification. Having arrived the day before, we were able to see some of the latest examples of from Case. The company previewed its prototype electric compact wheeled loader alongside two electric excavators, the CX15EV and the CX25EV.

Machines like the CX15EV and CX25EV epitomise the company's sustainability development, according to Cassinelli. He says, “I would say we are one of the best in terms of effort. I say this because we have electrified models that are ready to buy and use, unlike other OEMs which have prototypes that are not available.

“I believe that electrification will be the future. I'm totally convinced. Of course, if we don't have a governmental institution pushing in this direction, it will take a long time. Not as long as we were thinking two or three years ago because of new battery technology with very high efficiency capacity.”

In terms of barriers to electric-powered equipment, Graziano tells *IRN* the cost of manufacturing electric equipment is a challenge that OEMs must overcome. However, he points towards two factors that will change attitudes towards electric machines; “When the OEM is able to reduce the cost of manufacturing, with a little bit of help from governments, these two elements will trigger a very quick shift.

“In ten years, I would say that 30% of compact equipment will be electric. In larger equipment, maybe 15 to 20%, but this is just my assumption. In the long-term, I 100% believe that electric as well as other renewable opportunities like hydrogen will replace fossil fuels.”

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PHOTOS: CASE CONSTRUCTION



Belgium now has a new rental association. Speaking to *IRN*, its chairman Bill Olivier reveals why it is needed and what issues it will tackle.

A new voice

Last month it was revealed that a new rental association had formed in Belgium. Founded by seven rental companies, the vision of the Belgium Equipment Rental Association (BERA) is to become the “leading voice and catalyst for machine rental companies” in the country.

IRN spoke to Bill Olivier, BERA chairman and CEO of Loxam in Belgium and Luxembourg, to discuss BERA’s creation, its goals and the equipment rental market in Belgium.

A voice for rental

“There have been some initiatives in the past that never worked out in Belgium”, Olivier tells *IRN* when asked why a rental association in Belgium is needed.

“The needs in Belgium are similar to the needs in other countries. We are confronted with a lot of government decisions, where we know that there are lobby groups who intervene, but for the group of rental companies who are sometimes really concerned, there was no spokesperson for them.”

The association will fill that gap and act as a voice for the equipment rental industry. Olivier says it has started strong in terms of membership. At the time of writing, 21 companies have signed up as members, most of which were announced before its official launch at Matexpo. Moving forward, Olivier says the goal is to reach 40 members operating in equipment rental, before reassessing its goals and potentially moving into other areas of rental.

In his role with the association, Olivier will, at least for the short-term, be front and centre of all activities,



with Pascal Ameloot, co-owner of Belgian company Huurland, assuming the role of secretary and Dennis Renders, manager of forklift dealer Hermans Heftrucks, to serve as treasurer.

Other founding members will have roles in organising working groups and events or carrying out external communication. Olivier describes it as an efficient and manageable structure, one which “has to be driven by the industry.”

On his own involvement, Olivier says the structure could change in the next 12 months as he balances his role with BERA with his duties at Loxam.

Olivier says, “I’m CEO of Loxam Belgium and Luxembourg so I can’t spend half my time managing BERA at the moment, but we have put a lot of energy to get to a professional level quite quickly. I’m in conversations with presidents of other federations in Belgium to see how they manage and organise.”

“Everything will depend on the number of members and sponsors. If we have a budget, we will be able to have somebody representing us, and if not, we will be forced to do a bit more ourselves.”

For the time being, his remit will include driving new members and “keeping the pace” when looking to deliver



on promises made to existing members, while he will also take up one of a number of working groups that BERA has organised.

Safety and legislation in equipment rental

The first details of future working groups were revealed to both current and potential members at Matexpo.

The first will focus on legislation in Belgium, which Olivier says is a huge cost and operational burden for equipment rental companies; “Technical controls in Belgium are more intensive than in other countries.”

“We have subjects such as the obligation about license plates for machines that are on the road. We have CO₂ emissions in city centres and problems in where they do not want us to come into city’s with big trucks to deliver machines between certain hours or certain traffic.”

The second working group on safety will cover two areas, site safety and theft prevention.

“On one hand it will cover safety of all the people working in our companies and on the job site. For example, accident prevention, accident plans and what can be done together. A lot of companies talk about that, but can we do something as a sector organisation?”

“On the other hand, we are all confronted with theft. Sometimes it’s the same guy who comes to rent a machine with us who pays two months and then he’s gone. He then repeats the same act with our colleagues.”

“How can we work on prevention? Not only by putting in track and trace, but also by creating database knowledge about certain habits, certain new procedures that the thieves are using. This is, for all of us, a big loss in our profit and loss, which we want to tackle.”

In the future, Olivier anticipates the association will organise a maximum of four events

“ There are a lot of subjects which we are all concerned with and individually we don’t have the weight to make it happen. That’s where we need to join forces through the association. ”

BILL OLIVIER,
chairman of the Belgian
Equipment Rental Association.



Theft and safety will be a focus of one of the working groups organised by BERA.



PHOTO: ADOBE STOCK

The formation of BERA

Early discussions on the formation of BERA took place last year between Olivier and Tom van Hooydonck, Belgian general manager, Boels. Following on from that meeting, Olivier approached the European Rental Association (ERA) who offered support with the initiative.

Then, in January this year a meeting was held at ERA's headquarters where the idea was first pitched to 20 companies. "The outcome of that meeting was that everybody was positive, everybody wanted it to happen", says Olivier, who joined Loxam four years ago from Dutch automotive group Van Mossel.

The decision was then made to formally launch the organisation with the help of its seven founding members Key-Tec, Heli, Wim Verhuur, Marchandise, Loxam, Huurland and Hermans Heftrucks, all of which have representatives on the board.

To achieve this, it will also organise social network meetings and share up to date information and data to its members on top of the previously mentioned working groups.

Olivier says that the sharing of data is where communication with external organisations will be crucial.

Firstly, he highlights ERA, with which the association will become a member; "Today in Belgium, companies are flooded with information or they get no information.

"We want to get to the middle, and we want to digest part of the information coming in and make it easy to access.

"And, if ERA needs to do a survey, we can be the intermediate to collect data to get to the right company."

Meanwhile, BERA will also remain in contact with

the Belgian government on subjects impacting its members. Olivier says, "There are a lot of subjects which we are all concerned with and individually we don't have the weight to make it happen. That's where we need to join forces through the association."

Of course, it is still early days for BERA with more to come in the near future, including the finalisation and launch its website.

And, despite being in its infancy, Olivier says the signs are positive; "It has been seen as a need for the industry. We feel a positive attitude towards the initiative and people wanting to support us.

"We have looked a lot at the Dutch Association, Verhurend Nederland. Some Belgian companies or some companies active in Belgium, they are already partner sponsors over there, so these are the ones which we will also add to our list in Belgium, that's for sure."

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annually, covering topics such as sustainability, innovation, laws as well as regulations and safety.

Supporting the Belgian rental industry

As part of its vision to become the leading voice for equipment rental in Belgium, the association says it will help "drive excellence, collaboration and value for our members and stakeholders."

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ERA reveals details of inaugural event in October, with the importance of people in the industry set to be explored.

Participate in the European Rental Week competition and webinar

The first ever European Rental Week, an annual event dedicated to the promotion of rental across Europe, will take place from 9 to 15 October 2023. This year's theme is 'Investing in People', which aims to raise awareness of the rental industry as an employer, in addition to promoting the wider benefits of rental to customers, policy-makers and other stakeholders.

In order to illustrate the key role of people to the success of the industry and to showcase the opportunities, careers, development and training that the industry provides for people from all backgrounds,

ERA is organising a competition and webinar for European Rental Week.

Post a video about why you love working in rental

Employees of rental companies in Europe are invited to post videos on social media about why they enjoy working in the rental industry and why others should consider a career in rental.

The competition will include videos posted on Twitter, LinkedIn, Facebook, Instagram and TikTok with the hashtag #WorkInRental. Videos posted until 15 October 2023 are eligible and the winner will receive a trip to Lisbon* in May 2024 to be recognised for their achievement during the ERA Convention and European Rental Awards event.

*Flights and hotel for the winner + another person. 3 runners-up will win €100 Amazon vouchers (or equivalent).

Join the ERA 'Building the Future' webinar

ERA is organising a webinar on 11 October on 'Building the Future' – People and growth in equipment rental.

After an opening by ERA President Stéphane Hénon, the webinar will present the 2023 ERA Market Report and will feature a panel discussion with industry experts on:

- The key role of people in the growth of the industry
- The skills required to keep the industry growing and to capitalise on the green and digital transitions
- What rental companies can do to attract the people they need to move forward as an industry of the



future

- Register here: <https://na.eventscloud.com/era-building-the-future-webinar>

About European Rental Week

European Rental Week was developed in collaboration with the National Association and Promotion Committees of ERA. It is an opportunity for rental companies and associations to strengthen their voice and impact by coordinating their promotional activities in order to improve the attractiveness of the industry, raise awareness of the rental concept and promote rental as a sustainable, cost-effective and resource-efficient solution.

It is a framework for promoting the rental business at different levels: European level (ERA), national level (rental associations) and market level (rental companies). Whilst there is guidance on what kinds of activities could take place, such as events, open days, school visits, videos and social media, there are no restrictions and no rules for participation.

Activities within different countries will be coordinated and promoted by the national associations within the European Rental Week framework. The

specific actions of companies and associations will be determined by their priorities, objectives and resources, as well as their own experiences in promoting their business.

Visit the European Rental Week website – <https://europeanrentalweek.eu/> – for information about the event and the theme for this year, as well as reasons to participate, ideas for activities and promotional materials to download.

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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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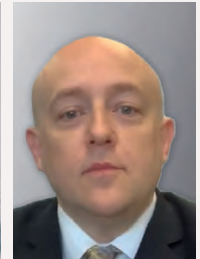
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CECE SUMMIT



On Thursday 26th October, the day after the Off-Highway Conference, the Committee for European Construction Equipment (CECE) will hold its biennial Summit at Autoworld.

For more information, visit: www.cece.eu/summit

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