INTERNATIONAL rental NEWS

JANUARY-FEBRUARY 2025 | A KHL Group Publication

www.internationalrentalnews.com

ERA/IRN rental tracker

Confidence down, hope up?

p14

INTERVIEW

Stuart Dean, incoming CEO of Kennards Hire

p46

INTERVIEW

Salti CEO on its 'secrets to success'

p18

Official magazine of the ERA

EUROPEAN RENTAL ASSOCIATION

BAUMA BUILDUP ■ HEALTH & SAFETY ■ 2025 PREDICTIONS

INTERNATIONAL rental NEWS
JANUARY-FEBRUARY 2025
Volume 25 | Issue 1
ISSN No: 1749-5040 (print)
ISSN No: 1749-5059 (online)

EDITORIAL
Editor Lewis Tyler
+44 (0)1892 786209
lewis.tyler@khl.com
Managing Editor
Euan Youdale
+44 (0)1892 786214
euan.youdale@khl.com
Rental Briefing Editor
Jeff Pao
+44 (0) 7309 317384
jeff.pao@khl.com
Director of Content
Murray Pollok
Staff Writers
Lindsey Anderson, Andy Brown, Alex Dahm, Mike Hayes, Catrin Jones, Cristián Peters, D.Ann Shiffler, Leila Steed

SALES
Vice President Sales, Access & Rental Division
Ollie Hodges
+44 (0)1892 786239
ollie.hodges@khl.com
Global Vice President Sales
Alister Williams
Client Success & Delivery Director
Peter Watkinson
Head of Marketing
Izzy Crouch

MEDIA PRODUCTION
Client Success & Delivery Manager
Charlotte Kemp
charlotte.kemp@khl.com
Client Success & Delivery Team
Alex Thomson, Ben Fisher, Olivia Radcliffe
Group Design Manager
Jeff Gilbert
Group Designer Jade Hudson
Events Manager Steve Webb
Events Design Manager
Gary Brinklow
Creative Designer Kate Brown

FINANCE
Credit Control Carole Couzens
carole.couzens@khl.com

CIRCULATION
Data Manager Anna Philo
Data Executive Vicki Rummery
HR Manager Sharron Brown

Chief Executive Officer
James King
Chief Financial Officer
Paul Baker
Chief Operating Officer
Trevor Pease

khl
www.khl.com

comment

Better times ahead?

Firstly, I want to wish all those reading this a Happy New Year (although by the time this reaches you we will already be in February.)

If 2024 was all about stabilisation in the industry, let's hope this year brings prosperity, certainty and progression in the most prevalent challenges facing companies around the world.

On to 2025, recent news already seems to provide a more positive outlook for some (see the United Rentals/H&E deal on page 11 for reference).

This year is of course a big one for events. Starting off a hectic start to the year in that respect is the ARA Show in Las Vegas.

By the time this issue goes to print the dust will be settling on the show, so in advance I would like to say thank you for taking the time to speak with me (and apologies for my frantic running between stands). Just two weeks later the Executive Hire Show takes place in the UK, and I look forward to seeing the innovation on show, as well as catching up with friends old and new.

Then there is of course the big one in April. Not only does the return of Bauma promise to be back to pre-pandemic levels in terms of attendance, it will also mark my show debut.

I am surrounded by Bauma veterans through our sister publications, each of which have reliably informed me to invest in a pair of comfortable shoes in preparation. Joking aside, I can't wait to see you all there and look forward to making the most of the networking opportunities.

Another big event, and one of my personal favourites is the ERA Convention, which takes place in Dublin on the 4th and 5th of June.

The evening of the 4th will also see the European Rental Awards return, and we are now accepting entries for the awards, with the deadline for submissions the 28th of February.

I hope to see you at one of the above events this year.

Lewis Tyler Editor

Correspondence or comments should be sent to:
The Editor, *IRN*, Southfields, South View Road, Wadhurst, East Sussex, TN5 6TP, UK.
+44 (0)1892 786209 | lewis.tyler@khl.com

KHL'S RENTAL PORTFOLIO

www.khl.com/information-store

EUROPEAN RENTAL AWARDS
www.khl.com/rentalawards

INTERNATIONAL rental CONFERENCE ASIA
www.khl-irc.com

International RENTAL exhibition
www.ireshow.com

rental tracker
www.khl.com/rentaltracker

rental newsletter
Rental BRIEFING GLOBAL RENTAL INSIGHT - EVERY DAY
rental weekly
www.khl.com/newsletters

IRN100
www.khl.com

SOCIAL MEDIA

PODCAST/VIDEOS

Listen to our interviews with industry experts on **www.khl.com**

TABLET EDITION

INTERNATIONAL rental NEWS

KHL OFFICES

UNITED KINGDOM (HEAD OFFICE)
KHL Group
Southfields, South View Road, Wadhurst, East Sussex TN5 6TP, UK.
+44 (0)1892 784088
www.khl.com/irn

GERMAN OFFICE
Niemöllerstrasse 9,
73760 Ostfildern, Germany
+49 711 34 16 74 0
gabriele.dinsel@khl.com

USA OFFICE
KHL Group Americas LLC
14269 N 87th St., Suite 205,
Scottsdale, AZ 85260, USA
+1 480 535 3862
americas@khl.com

CHINA OFFICE
KHL Group China
Room 769, Poly Plaza, No.14, South Dong Zhi Men Street, Dong Cheng District, Beijing, PR China 100027.
+86 (0)10 65536676
cathy.yao@khl.com

LATIN AMERICA OFFICE
KHL Group Americas
Av. Manquehue Sur 520, of 205
Las Condes, Santiago, Chile.
+56 9 77987493
latina-americana@khl.com

KHL SALES REPRESENTATIVES

VICE PRESIDENT SALES, ACCESS & RENTAL DIVISION
PLUS **IBERIA/KOREA**
Ollie Hodges
+44 (0)1892 786239
ollie.hodges@khl.com

AUSTRIA/GERMANY/SWITZERLAND
Peter Collinson
+44 (0)1892 786220
peter.collinson@khl.com

BELGIUM/FRANCE
Hamilton Pearman
+33 (0)1 45930858
hpearman@wanadoo.fr

CHINA **Cathy Yao**
+86 (0)10 65536676
cathy.yao@khl.com

ITALY **Fabio Potestà**
+39 010 5704948
info@mediapointsrl.it

JAPAN **Michihiro Kawahara**
+81 (0)3 32123671
kawahara@rayden.jp

THE NETHERLANDS
Arthur Schavemaker
+31 (0)547 275005
arthur@kenter.nl

NORTH AMERICA
Thomas Kavooras
+1 847 609 4393
thomas.kavooras@khl.com

SCANDINAVIA **Greg Roberts**
+44 (0) 7950 032224
greg.roberts@khl.com

TURKEY **Emre Apa**
+90 (0)532 3243616
emre.apa@apayayincilik.com.tr

UK/IRELAND **Eleanor Shefford**
+44 (0)1892 786236
eleanor.shefford@khl.com

GLOBAL VICE PRESIDENT SALES
Alister Williams
+1 312 860 6775
alister.williams@khl.com

Printed by: Buxton Press

...inside

REGULARS

SHOWS

KHL Group on the web

Visit **www.khl.com** for a wide range of editorial features, including breaking news, 'web exclusive' articles, our Videozone and more. Readers can also register to receive the digital issues of all magazines in the KHL portfolio at: **www.internationalrentalnews.com**

- Subscribe to our weekly e-Newsletter at the website.

MEMBERS OF

The paper in this magazine originates from timber that is sourced from sustainable forests, managed to strict environmental, social, and economic standards. The manufacturing mill has both FSC & PEFC certification, and also ISO9001 and ISO14001 accreditation.

FEATURES

...outside

IRN catches up with Stuart Dean, the incoming CEO of Kennards Hire. Read the interview on page 46.

PHOTO: UNITED RENTALS

DIARY DATES khl.com/events

2025

EXECUTIVE HIRE SHOW
12-13 February 2025
Coventry, UK

IAPA SUMMIT
12-13 March 2025
Dublin, Ireland

BAUMA
7-13 April 2025
Munich, Germany

ERA CONVENTION AND EUROPEAN RENTAL AWARDS
4-5 June
Dublin, Ireland

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

Hilti's Bluetooth Low Energy (BLE) Runtime Tag. PHOTO: HILTI

United Rentals to acquire H&E

United Rentals has entered into an agreement to acquire H&E Equipment Services, one of its major competitors, in a deal worth $4.8 billion, including $1.4 billion in net debt.

The acquisition will create a rental business with total 2023 revenues of $15.7 billion.

United Rentals generated $14.3 billion in revenues in 2023 and ranked top of the global IRN**100** rental company list, while H&E's revenues were $1.4 billion and it was 11th in the IRN**100**.

The deal could increase United Rentals' North American market share from around 15% to closer to %16.5-17%.

The board of directors of both companies have unanimously approved the transaction, although the agreement includes a 35-day "go-shop" period to 17 February, during which H&E can consider alternative offers.

If concluded, it will give United Rentals more than 160 branches, around 2,765 employees and a 64,000 unit fleet with an original cost of over $2.9 billion. It will also include a non-rental fleet with an original cost of roughly $230 million.

United said the planned merger, which could close in the first quarter of 2025, is consistent with its "grow the core" strategy and will increase its capacity in key US geographies. *IRN*'s Murray Pollok has taken a deeper look into the deal and its impact for both businesses and the North American market on page 11.

Renta and Hilti partner on fleet management app

Renta Group has partnered with Hilti to launch an advanced fleet management, tracking and tool usage app.

Easy+ is structured upon Hilti's Bluetooth Low Energy (BLE) Runtime Tags, Hilti ON!Track Unite and Trackunit, and is an extension of Renta's standard Easy app.

According to Renta, it gives customers the power to track, influence and report information vital to specific projects.

Enhanced notifications show equipment inactivity, idling, low battery levels and out-of-office-hours use, while telematic data highlights inefficient tool usage and environmental control data.

Meanwhile, Hilti Runtime Tags measure and store cumulative runtime data when it senses the tool is operational, recording daily utilisation and reporting the last seen location.

The Tags automatically transmit their data when they are in range of Hilti Gateways or Trackunit telematic boxes and can be scanned with smartphones using the Hilti ON!Track app.

Hilti BLE Runtime Tags' generated data is made available through the Hilti ON!Track Unite open Application Programming Interfaces (APIs) for processing in Renta's Enterprise Resource Planning (ERP) system.

Joel Särkkä, chief information officer, Renta Group, said, "At the outset of the partnership I said the Hilti Runtime Tag solution is a real gamechanger and now we are seeing the benefits of the investment for our most important people, the customers.

"The level of detail available in the new Easy+ app is unlike anything that has been seen before, and for products attached with a Runtime Tag customers can maximise powered asset usage while always knowing the locations of every item they have on hire. That ultimately means higher profits."

Michael Neidow, head of business unit Construction Software, Hilti Group, added, "Runtime Tags, supported by ON!Track Unite and Trackunit, show how it is possible to provide connectivity and transparency along the entire rental cycle of every powered asset."

PEOPLE NEWS

■ US rental company **Sunstate Equipment** has appointed **Norty Turner** (pictured) as president and CEO. Turner, who assumes the role on February 10, is replacing former president and CEO Chris Watts, who is set to retire as president and CEO in March after nearly 30 years with the company.

■ **Noblelift** has announced the appointment of **Tim Whiteman** as CEO of its newly created access division. He is responsible for developing the full potential of the current production lines in China and Malaysia and will focus on bringing the product to rental companies across the world. Whiteman was formally at Sinoboom and was CEO of IPAF for more than 15 years.

Yanmar Compact Equipment has announced that it will not be exhibiting at Bauma.

The OEM said it wanted to prioritise support for its dealer network and customers.

"This strategic decision reflects our commitment to close engagement and

Yanmar CE has announced that it will not be exhibiting at Bauma Munich 2025.
IMAGE: YANMAR CE

European Rental Awards deadline approaches

Companies have until Friday 28 February 2025 to submit entries for the 2025 European Rental Awards.

Award judging criteria and the online entry form can be found at https://eurorentalawards.com.

In total, eight awards will be up for grabs this year, including a new category on the 'Best Safety Initiative by a Rental Company'.

The award will assess an occupational health and safety initiative or programme implemented by a rental company in late 2023 and/ or 2024.

All entries should be sent to Lewis Tyler, IRN at: Lewis.Tyler@khl.com

The awards, jointly organised by International Rental News and the European Rental Association, will be held on 4 June in Dublin, Ireland, during the ERA's annual convention (4-5 June).

The judging meeting will be held on 25 March, with the award shortlists announced shortly after that.

The winners of the 2024 European Rental Awards celebrate.

Zeppelin to expand Cat partnership

The Zeppelin Group is to take over the sales and service operations for Caterpillar equipment in Norway and the Netherlands, adding approximately 2,000 employees and €1.1 billion in revenue.

The acquisition involves Zeppelin purchasing all shares in the holding company of Pepp Group BV, the owner of Pon Holdings, which has managed the territories for two decades.

Under the agreement, the legal entities in Norway and the Netherlands will transfer to Zeppelin Group as part of a share deal.

The move also includes rental solutions as well as drive and energy systems in the two countries.

Zeppelin described the transaction as a significant step in becoming one of the "leading sales and service organizations worldwide for Cat products."

Matthias Benz, chairman of the Group management board of Zeppelin, said, "With these two areas, we are strengthening the long-term partnership with Caterpillar at a global level. Zeppelin is thus growing in our well-known and proven core business.

"We will be able to offer our customers a wide range of solutions, products and services through our complementary product portfolio.

"We are proud that Caterpillar has expressed its confidence in us, and that we will operate in additional countries in future. We see a great deal of potential in these new regions and are pursuing a long-term growth strategy."

Zeppelin Rental, Zeppelin Baumaschinen and Caterpillar's joint Bauma 2022 showcase.

PHOTO: ZEPPELIN

Mollo makes landmark acquisition in Italy

Mollo Noleggio is expanding with the acquisition of Sovecar Group's rental division.

Mollo said the deal for Trento-headquartered Sovecar, which also operates two branches in Isera (Rovereto) and Arco, marks "an important moment of growth."

It said customers of Sovecar Group's rental division will be able to count on a wide range of equipment and will have access to "advanced digital technologies and a technical assistance service with highly specialised personnel, guaranteeing the highest standards of safety and equipment maintenance."

As well as seeing Mollo enter the Trentino region, the company will also expand its coverage in Italy to 66 depots and over 600 employees.

Mauro Mollo, president of the Mollo Group, said the company "wants to continue to grow by acquiring realities specialised in rental, strongly rooted in the territory they belong to."

He said, "For over 40 years Sovecar has based its essence on family, trust and professionalism, constantly working to offer the best possible experience to its customers. They share with us the same vision oriented towards growth, quality and customer satisfaction."

PHOTO: MOLLO NOLEGGIO

focus on what matters most – our customers and dealer network," said Jon Lopez, president of Yanmar CE's Europe, Middle East and Africa (EMEA) region.

"While Bauma remains a fantastic platform for the global construction equipment community, we believe this approach allows us to provide even greater value during a period of dynamic industry change."

Yanmar said it would launch a series of initiatives, enhance customer experience, strengthen partnerships, and support sustainable growth.

■ **Lambertsson** has promoted regional managers **Björn Fredriksson** and **Tobias Kvick** to the positions of CEO and deputy CEO. Carl Rülcker will then focus on leading Peab Byggsystem.

■ Portable storage and handling tank manufacturer **Western Global** has announced **Jeff Lowe** as president of its North America division.

L to R: Agako Nouch, Kent Somerville, Trayson Mathias and Scott Young of Volvo CE with Aaron Birnbaum, Will Bailie, Mark Humprey, Rob Valerio and Matt Gavin of Herc Rentals. PHOTO: HERC RENTALS

Herc and Volvo agree multi-year supply agreement

Volvo Construction Equipment and Herc Rentals have signed a multi-year agreement that will see the rental company take delivery of hundreds of compact excavators.

The deal will see Herc add an unspecified number of 3.7 tonne Volvo EC37 compact machines to its fleet across its 439 branches in the US and Canada. The final units of the first phase of Herc Rental's order were recently delivered, and hundreds more are planned for delivery to their branches across the US and Canada in 2025.

It follows a period in which the companies collaborated to "develop the model in a way that would best serve rental customers." Volvo first requested feedback from Herc technicians, salespeople and other staff when it was showcased at the Herc Rentals ProExpo in early 2024.

Following on from that, Volvo implemented several updates that are said to be beneficial to the rental customer, including making it easier to change attachments on the machine. In terms of user experience, Volvo said it prioritised the experience of the operator with the addition of a large cab, more ergonomic features and factory-installed telematics that offer "comprehensive real-time machine management."

For safety, Volvo said it offers increased operator comfort, more stability and easier maintenance than its previous model, while it also offers 10% better fuel efficiency.

Other features of the machine, which is powered by a Volvo D1.7A engine, includes customisable hydraulics flow settings and work modes.

Ashtead to make US listing switch

Ashtead Group has said that a US stock listing "is in the best interests of the business". It will seek shareholder approval with the goal of completing the US listing within 12 to 18 months. It said it would retain a UK listing in the international companies segment.

As part of the move the group will rebrand as Sunbelt Rentals. Ashtead owns Sunbelt Rentals in the US and the UK, but the US generates the vast majority of its revenues and 98% of its profits in the 2024 financial year. Its executive management team is based in the US.

The company said a US listing would benefit it in the following ways:

- Alignment of listing location with the majority of the its business activity, leadership team and employees;
- Increased exposure to US investors;
- Enhanced liquidity in its shares given access to US capital markets;
- Higher profile through a group rebranding as Sunbelt Rentals;
- Simplified share ownership for employees and expanded access to the recruitment and retention of top US talent;
- Well positioned for inclusion in leading US equity indices.

Ashtead said it would discuss the proposal with shareholders, before putting forward a resolution for approval at a general meeting; "The Board expects that the necessary steps would be implemented over the next 12-18 months."

PHOTO: ASHTEAD GROUP

IRN RENTAL SHARE INDEX

COMPANY		29/11/24	31/01/25	CHANGE (%)
Ashtead Group	UK£	62.9	53	-16%
Emeco	A$	0.87	0.92	+6%
H&E Equipment	US$	59.7	88.6	+48%
HSS Hire	US$	0.59	0.75	+27%
GAM Alquiler	€	1.2	1.27	+6%
Herc Rentals	US$	232	203	-13%
Kanamoto	Yen	2861	3135	+10%
Nishio Rent All	Yen	3675	4285	+17%
Speedy Hire	UK£	0.34	0.28	-18%
United Rentals	US$	866.00	758	-12%
VP PLC	UK£	6.00	6.00	0%
WillScot	US$	38.24	37.06	-7%
IRN Index		1485	1347	-9%

Acces Industrie buys major competitor

Acces Industrie has said it has consolidated its position as the third largest French rental company with the acquisition of Huet Location.

Founded in 1991 by the Huet family, Huet Location is a specialist in the rental of aerial work platforms and personnel lifting platforms. Huet's website states it has a rental fleet of 2,500 machines.

Operating from its headquarters in La Frette, the company operates eight depots in Nantes, Amiens, Caen, Paris, Bordeaux, Marseille, Grenoble and Toulouse.

The deal is the first notable move it has made since it was sold by its private equity owner Equistone Partners Europe in April last year.

IN BRIEF

■ **Kennards Hire** has opened its first branch in Napier, New Zealand, bringing its total branches there to 30.

■ **Coates** has signed a long-term agreement with UGL for the liquefied natural gas facilities on Curtis Island.

■ **Vp plc** has described its half-year results for 2024 as "robust."

■ **Boels** has said that it has the largest fleet in the Netherlands following the merger its own fleet of aerial work platforms with that of Riwal it has the largest fleet in the Netherlands.

■ **JLG Industries, Inc.** has launched a 60-foot articulated boom, and has plans to expand the electric, articulated line later this year.

■ **Wynne Systems** has updated its RentalMan suite with the addition of inventory management capabilities.

■ **GAM** has announced a Q3 revenue increase of 8% (to €219.7 million) from the same period in 2023.

■ The **European construction sector** is expected to see modest recovery in 2025, with growth forecasted at just 0.5% to an ING report.

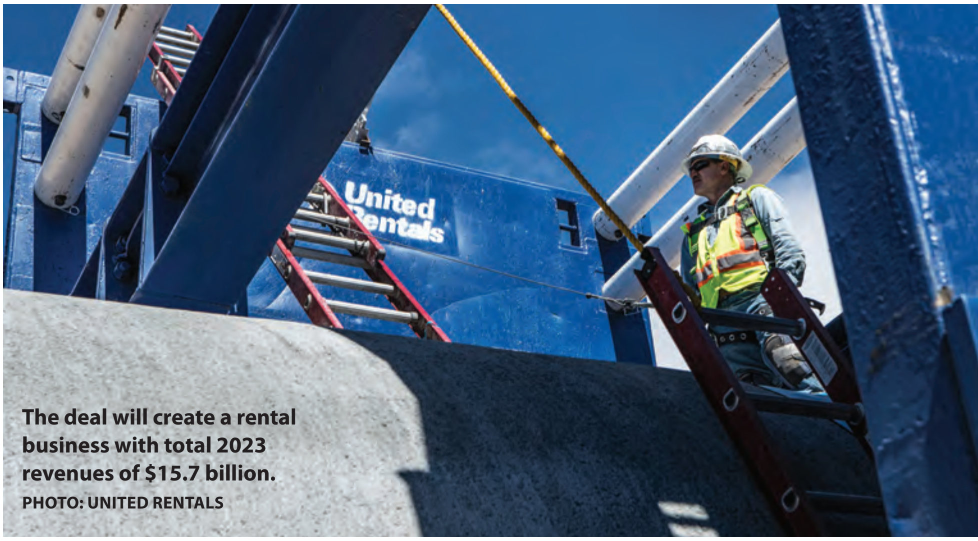
■ **Pacific Shoring Products** has been acquired by **Palm Peak Capital**.

■ US-based Caterpillar dealer **Ring Power** has become part of the **Magni Telescopic Handlers** dealership network.

ACCESS WITH ZOOMLION GREEN
2025 IPAF summit
iapa 2025 International Awards for Powered Access
bauma
BOOTH NO. FS.905
DATE: 12-13 March 2025
LOCATION: Dublin, Ireland
DATE: 7-13 April 2025
LOCATION: Munich, Germany
ZT51JEH
Work Height: 50.6m
Gradeability: 45% (24°)
Platform Capacity: 300/454kg
ZOOMLION
ZT51JEH
ZT72J
Work Height: 72.3m
Gradeability: 40% (22°)
Platform Capacity: 230/300/454kg
ZOOMLION
ZT72J
ZOOMLION
ZOOMLION
Zoomlion Intelligent Access Machinery Co., Ltd.
Add: 701 Xulong Nan Lu, Xiangjiang New District, Changsha Hunan, China
E-mail: awp@zoomlion.com
Tel: +86 0731-88250971
ZOOMLION ACCESS
ZOOMLION ACCESS
ZOOMLION ACCESS
ZOOMLION ACCESS
ZOOMLION ACCESS

United Rentals/H&E deal: Is it a good match?

Murray Pollok **analyses how the $4.8 billion deal could impact fleet, customers and United's market share going forward.**



The deal will create a rental business with total 2023 revenues of $15.7 billion.
PHOTO: UNITED RENTALS

Deals like the $4.8 billion United Rentals acquisition of H&E Equipment Services don't come around too often.

Not only will it create a rental business with total 2023 revenues of $15.7 billion, combining the largest and the sixth largest rental businesses in North America, it could increase United Rentals' North American market share from around 15% to closer to %16.5-17%.

Matthew Flannery, chief executive officer of United Rentals, said it is acquiring a well-run operation that's primed to benefit from its technology, operations and broad value proposition.

He said, "Most importantly, we're gaining a great team that shares our intense focus on safety and customer service. We'll be working side-by-side throughout the integration to capitalise on best-in-class expertise from both sides.

"We will use our well-honed integration playbook as we prepare the acquired branches to take full advantage of our systems and operational capabilities, and gain from our employee and customer-centric culture. I look forward to welcoming our new team members upon the closing of the acquisition."

A good match?

Beyond the question of whether the deal makes financial sense - the price equates to an EBITDA multiple of 6.9, which does not seem unduly high - there is the question of the operational fit, in terms of customers, fleet and locations.

It's worth remembering that H&E only became a pure-play equipment rental business very recently. In late 2022 it sold the last of its construction equipment dealerships, having previously exited the business of selling and renting cranes.

That means only two years focusing on rental, so it is a far less mature rental business than United, with less focus on specialty rentals, for example.

Specialty now makes up just under 30% of United total business, while for H&E it is negligible: that is one of the benefits of the deal, with United able to cross-sell its numerous specialty rental services to H&E's customers and through H&E's depots.

Indeed, United says it hopes to add US$120 million in revenue annually by the third year of ownership through cross-selling, with specialty a part of that.

The same customers and fleet?

In terms of customers, there is a significant difference between the two companies. H&E is much more reliant on the non-residential customer segment than is United. That sector represents 69% of H&E's business compared to 46% at United.

Another big difference here is United's exposure to industrial markets, including oil and gas, which at 49% is much higher than the 13% at H&E.

The additional fleet that H&E brings will be a significant benefit. H&E's fleet, with a $2.9 billion value at original cost, is younger than United's, at 40.8 months average age compared to 52.4 months. That will reduce the average age of United's $20.6 billion fleet.

H&E's aerial platform fleet is 51.6 months old on average, which is close to United's total fleet average, but in the case of earthmoving equipment, H&E has a very young fleet, averaging just 29.5 months.

The fleet mix is slightly different, of course, with H&E heavily reliant on AWPs (33%), material handling (30%) and earthmoving (25%). In contrast, AWPs make up 25% of United's fleet, with around 20% in material handling and less than 15% in the segment that would include earthmoving. United, of course, has a much larger proportion of tools and specialist equipment.

Overlap in depot network?

What about the locations that H&E brings, around 160 depots. H&E was investing heavily in new opens and had established itself nationally in the US over the past few years.

However, it is strong in key markets, with 46 branches in the Gulf Coast, 31 in the Southeast, 20 on the West Coast, and 18 in the intermountain region (between the Rocky Mountains on the east and the Cascade Range and Sierra Nevada on the west.)

A key part of H&E's strategy in recent years was to target mega-projects, and it said in late 2023 that 85% of such projects - defined as larger than $500 million in value - being bid for in 2023 and 2024 were covered by its network.

Of course, H&E's 160 locations is dwarfed by United's 1571 depots in North America, but it will strengthen its network in important industrial states.

Market shares

Despite the scale of the United Rentals business, the addition of H&E will not transform its market share.

United reported in October last year that its overall North American market share in 2023 was 15%, based on the ARA's annual estimate for the market. The addition of H&E's approximate $1.5 billion in annual revenue will increase that to closer to 16.5%.

That strengthens its position as market leader in North America, with Sunbelt Rentals' share being closer to 11%, followed by Herc Rentals at 4%.

Among other things, this illustrates the still-fragmented structure of North America's rental market. For United, H&E was one of the few deals open to it to shift the dial on its share.

The deal will be concentrating minds at the other big rental players in the US, with the focus likely to be on how Sunbelt will respond.

And of course, the United-H&E deal is not yet concluded, with the agreement allowing H&E to solicit other buyers and perhaps further increase the $92 dollar per share offer agreed with United.

When the transaction is completed, we hope to bring readers more analysis of the financial aspects of the deal. **IRN**

Andy Wright **talks integrating new rental businesses – and reveals why getting it right is of critical importance.**

Big company buys small company and ruins it!

As the title says, history is littered with failed acquisitions and deals that didn't deliver what they were intended to.

Acquiring and integrating other organisations successfully isn't an easy thing to do, so why do so many organisations choose this as the route to deliver growth for their shareholders?

Well, buying an established revenue and profit stream seems to make sense, and can seem like an easier solution than working out how to grow your business organically. It can also accelerate growth, as once the new business is bolted on; the revenues and profits appear in your accounts immediately and going forward, but only if you can keep all of them.

This provides day one growth and some opportunity to take future synergies, either revenue or cost based, to further bolster profits.

Entering new markets or geographies is often also achieved via acquisition as specific skills and knowledge is often considered to be easier to buy in than nurture.

So, there are numerous good reasons to acquire, but how can you integrate the new business so that you can retain all of the value that you thought you were buying?

Successful acquisition integration

In my experience, a large part of the successful integration happens before the business is even acquired. There are a number of things that you need to do as part of the process of acquisition that will ensure a smoother transition for the new business.

Firstly, and very importantly, there needs to be an obvious 'cultural fit' between your business and the business that you are buying.

This means that it will be easier to integrate if both leaderships have a joint vision of the opportunities that exist and how these might be jointly addressed and how the joint synergies of both organisations are better then each business trying to do it alone.

Secondly, the building of trust between both sets of leaders/owners is critical. Part of building trust is in getting to know each other better and not just in a business sense.

Patience is often key as it can take many meetings in a business setting and over dinner to get to the point that both sides can see the benefit of joining up. Trust is also built up by adopting an honest approach to discussions.

For example, there will undoubtedly be a question around future branding, it's always an issue, so far better to deal with this up front and if you intend to change the name in the future then be honest about it. Doing this after the event will damage trust and as this particular area is highly emotive for owners, any negative repercussions can be significant.

Effective communication

Once the business is acquired, it's crucial that members of the new team meet someone from the acquiring company on day one, setting out what this change means for everyone. This can be done as a group of people but there should also be time for one-on-one discussions where this is needed. Each group needs to be allocated an experienced member of the acquiring team, so that they know where to go if they have queries in the short term.

Communication in the early stages is critical as everyone wants to feel important, wanted and not isolated. Painting a picture of the future direction of the business and where they fit in if a powerful tool in establishing the psychological contract that is necessary to build long term commitment from everyone.

As is inclusion. Look for ways to include as many members of the new team in broader business projects as possible, allowing them to get to know other people and build a network of key contacts. Consult with them on major changes that are planned.

Generally, the acquiring business will be looking to 'get control' of the new business and often this will mean that the acquired organisation will need to take on a new IT system very early in the process, so that the new owner has visibility of rental assets, etc.

It's often helpful to establish a steering committee populated by key people from both teams to manage the integration of the businesses as well as having people from both businesses involved in managing the integration of each functional area, such as HR, Health and Safety and Finance to name but a few.

Ultimately, most of this will come down to the trust that exists between both parties and the best way to create this, post deal, is to ensure that your words and actions always match.

I've done numerous acquisitions in my career, as well as the integration of twenty four separate, existing brands during the birth of Sunbelt Rentals in the UK and these few golden rules have served me well in all of these situations. Hopefully, you will find them useful, also. **IRN**

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

Confidence down, but

More than 120 companies took part in the ERA/*IRN* RentalTracker survey for the fourth quarter of 2024. Lewis Tyler **analyses the key findings.**

Business sentiment among equipment rental companies in Europe is continuing to decline, albeit with no sign of a collapse.

This is a key finding from the Q4 2024 ERA/*IRN* RentalTracker, conducted from mid-December to early-January

The survey, which received more than 120 responses, revealed that one in five companies (20%) reported a worsening of business conditions now, although 20% said that conditions are improving, resulting in an even balance of opinion.

With 60% of companies reporting stable conditions, there seems to be reasons for cautious optimism.

However, comparing responses in the second quarter of 2024, when the balance of opinion was +10%, indicates a slight deterioration in confidence.

Low construction activity and high interest rates are affecting business conditions across various regions in Europe, with some companies particularly feeling the pressure, it seems.

The survey does reveal some optimistic sentiments. For example, there was a +6% balance of opinion on Q4 market activity compared to the same period in 2023. That compares to a negative balance of opinion of -1.9% for the second quarter of 2024. Not a massive swing in sentiment, but a sign that there is hope for the future.

For Q4, 31% reported higher activity than the same quarter in 2023, while 25% said activity was lower.

A trend in recent surveys has been one in which responses reveal an industry looking to the future for some form of positivity, and that is what we find here.

In the 'expectations for a year from now' metric, 41% said they expect conditions to be better in a year, 48% said they expect no change and just 11% predicted worse conditions, giving a +30% balance.

CapEx and utilisation

Capital expenditure has been historically high post-pandemic. However, given the current economic climate and weak construction market in some regions it should come as no surprise that companies

FIGURE 1

EUROPE **Business conditions now** **Q4-24**

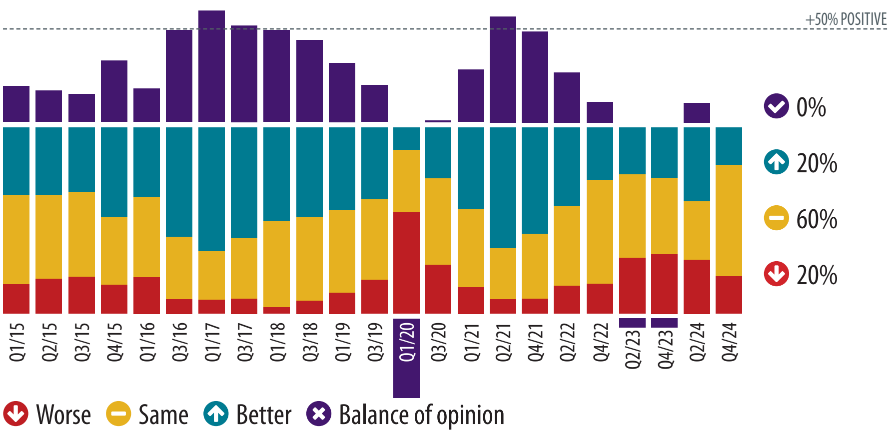


TABLE 1

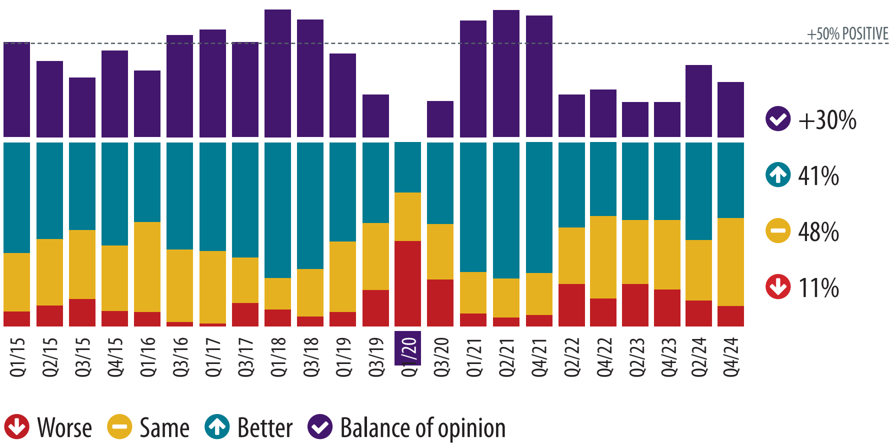
Forward thinking

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

UK & Ireland	56%	(50%)
France	55%	(21%)
Spain	36%	(18%)
All Europe	**26%**	(53%)
Germany	26%	(53%)
Italy	21%	(38%)

FIGURE 2

EUROPE **Expectations for year from now** **Q4-24**



hope remains

are expecting to tighten spend this year.

In that respect, there is what can only be described as a significant shift, with just 23% of companies expecting to increase fleet CapEx in 2025, the exact same as those expecting to decrease spending.

So, on the face of it the balance of opinion is even, but when comparing the results to the previous survey which was +24%, it is a big drop.

As for employment intentions, 97% of responses said they intend to either recruit more or maintain staff levels in the coming months, with just 3% looking to reduce workforces.

That results in a positive balance of opinion of +33%, but given the skills shortages in Europe and ongoing issues with recruiting and retaining staff, this is probably not a surprise.

How about fleet utilisation levels in the final quarter of 2024? This metric has fluctuated for some time but largely stayed positive since the pandemic.

That is exactly what we find here. The 27% noting increasing utilisation levels versus the 18% reporting a decrease is enough to see a 9% balance of opinion.

Add the 27% to the 55% that said utilisation was stable and the result is even more positive, with more than three quarters seeing at least stability.

Regional focus

Looking at the results from a geographical perspective, the table gives a detailed overview of sentiment across Europe.

Let's start with the positives. Spain has been one of the strongest markets in terms of RentalTracker sentiment, and this has continued in the Q4 survey, even if the relatively small number of respondents mean that results should be viewed as anecdotal rather than conclusive.

69% of respondents from Spain said they are experiencing improving market conditions (up from 67% in Q2 of 2024), while 36% said they expect conditions to be better in 12 months' time (up from 18% in Q2 of 2024).

As well as being the only country to be above the European average in each metric, Spain also comes out on top of the countries expecting to employ more (55%), reporting higher fleet utilisation (66%) and anticipating higher investment (66%).

Perhaps the most notable response was the 73% that reported quarter on quarter growth.

On the other side of the coin, not one survey respondent from France said they were experiencing improving current conditions.

>

" As well as being the only country to be above the European average in each metric, Spain also comes out on top of the countries expecting to employ more (55%), reporting higher fleet utilisation (66%) and anticipating higher investment (66%). "

FIGURE 3

EUROPE **Time utilisation trend** **Q4-24**

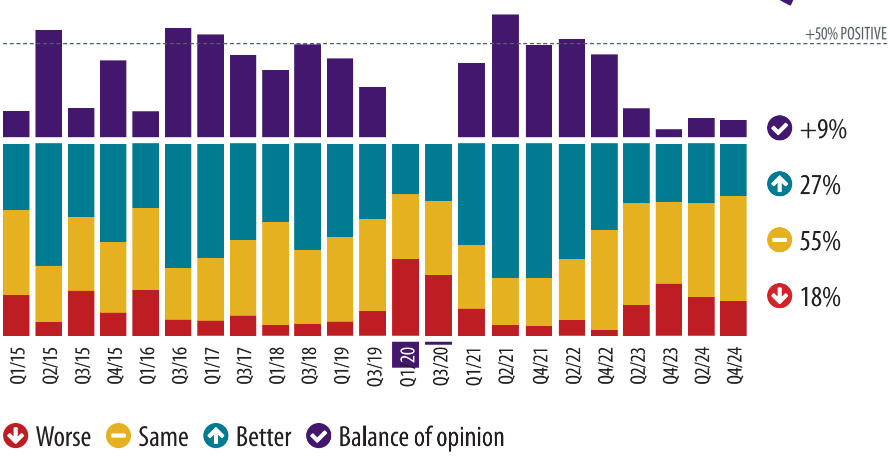


TABLE 2

The here and now

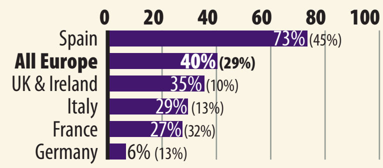
How countries differ on key indicators in the survey

(all figures in percentages)

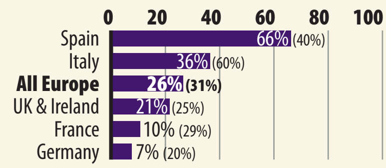
PERCENTAGE OF COMPANIES EXPERIENCING IMPROVING MARKET CONDITIONS (END Q4, 2024)

Spain	69%	(18%)
Italy	25%	(38%)
UK & Ireland	24%	(50%)
All Europe	**24%**	**(53%)**
Germany	6%	(53%)
France	0%	(21%)

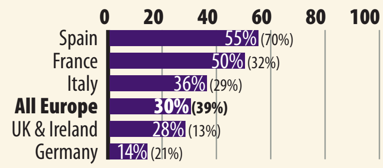
PERCENTAGE REPORTING Q4 2024 GROWTH VS Q4 2023



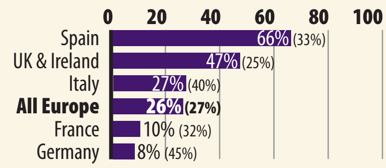
PERCENTAGE WITH INCREASING UTILISATION IN Q4 2024



PERCENTAGE WHICH WILL EMPLOY MORE IN Q1 2025



PERCENTAGE EXPECTING TO INCREASE INVESTMENT IN 2025



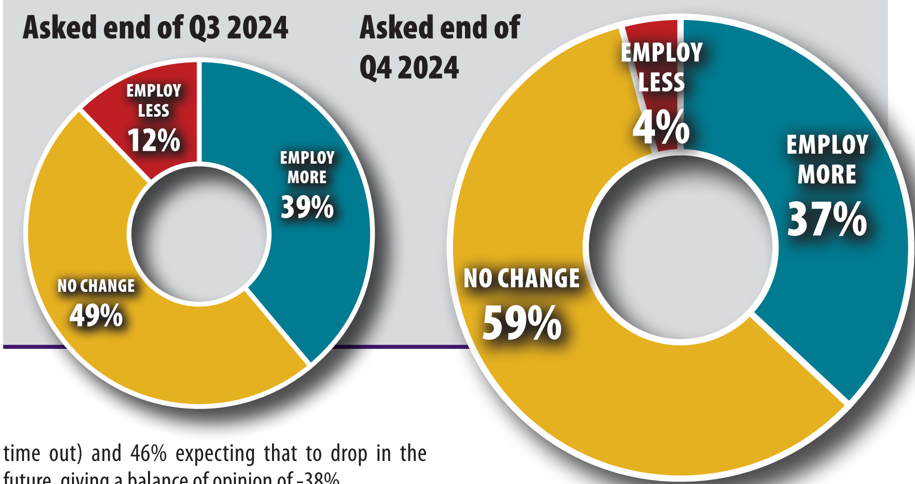
Survey info

The survey was conducted in December 2024 and the first two weeks of January 2025, with more than 120 companies in Europe taking part. *IRN* would like to thank ERA and national rental associations in Europe for their help in distributing the survey.

If you have questions about the survey, please contact *IRN* Editor, Lewis Tyler: lewis.tyler@khl.com

FIGURE 4

EUROPE **Employment intentions for next quarter**



Again, a low pool of responses renders this anecdotal, but a pattern is certainly emerging given that French rental and distributors association DLR's market barometer for Q3 of 2024 revealed that its members "remain concerned about the sector's future."

There was a good level of response from Germany, but unfortunately the findings don't make for great reading.

In fact, Germany comes bottom of all but two metrics, conditions now and business levels for the year ahead (Italy comes bottom here with only 21% of responses expecting business to improve in 12 months' time).

Just 6% of German respondents said conditions were improving in Q4 last year, the same number that reported quarter on quarter growth.

Perhaps the most eye-catching statistic is that of CapEx, with just 8% of responses from Germany expecting to increase spend (down from 45% last time out) and 46% expecting that to drop in the future, giving a balance of opinion of -38%.

It is a mixed bag from Italy, where there is a drop in sentiment across many metrics, but an increase in positivity in employment intentions (36% will employ more in the first quarter of 2025) and Q4 quarter activity compared to 2023 (29% said Q4 2024 growth vs Q4 2023 had increased).

Regional focus

Looking ahead, 56% of companies in the UK and Ireland expect conditions to be much better this time next year. Sentiment for current conditions in the UK and Ireland is down, with 24% of companies experiencing improving market conditions at the end of Q4 (compared to 50% in Q2 of 2024). However, it is above the European average for CapEx, with 47% expecting to increase fleet spend this year.

Recent RentalTracker surveys pointed towards an industry waiting for better times; the Q4 results suggest that the waiting may go on. **IRN**

French rental company Salti has aims to consolidate itself as a top player in its home market. CEO and president Jean-Sebastian Guiot **tells *IRN* how.**

Salti and its secrets to success

Guiot says Wellness Week is "only a sample" of its commitment to its staff.

The equipment rental market in France is nothing short of competitive, with the likes of Loxam and Kiloutou dominating a large share.

Driving home that point, in 2023 Kiloutou reported more than €1 billion in revenues for the first time.

On the backdrop of that, standing out is crucial for other key players looking to consolidate a place in the market and drive growth.

Salti's fleet includes more than 200 units of alternative powered equipment.

One such company is Salti, a fourth-generation family-owned firm headquartered in Marcq-en-Barœul, near Lille, in northern France.

In the view of Jean-Sebastian Guiot, CEO of Salti, while Loxam and Kiloutou may occupy the top two places in the market, there remains ample room for companies to consolidate a place in the top four, and the race is on to claim it.

A different path

And, while others may factor in acquisitions or private investment as part of any plans to enter that race (see the acquisition of Huet Location by Accès Industrie as a reference point), Salti is taking a rather different approach, one that focuses on new depot openings, extending the life of equipment and placing itself as a supplier of green solutions to customers.

Guiot, who first joined the company in 1998, tells *IRN* on a video call, "We want to go further in two ways. First, we want to extend the life of our equipment with our great technicians. We want to invest massively in green products.

"This year (2024) on over €50 million investment two thirds of that was on green products. We believe that there is a place for a third agile player that can do the right stuff."

As for its plans to grow its network of depots across France, where it operates 47 at the time of writing, the plan is to open at least three depots a year.

Last year it added one in the Bourges region, months after it expanded in the Valence region on the Lyon – Marseille road axis, supporting its presence in the south-east.

The approach to depot openings is far from scattergun, as he describes, "Our strategy is to open close to another depot and when

While construction is down, solar projects have offered Salti a new stream of revenue, according to Guiot.

The company operates 47 branches in France.

ALL IMAGES COURTESY OF SALTI

we deliver products to another city when we are not already there, we know that it's time for us to have a new depot, but we try to avoid investing in the middle of nowhere.

"We like to have a small cluster of depots close to the original one. There are no rules except that and trying to anticipate client demand."

Salti's secrets to success

Aside from depot expansion, as part of its plans to consolidate itself inside the top four in France Guiot says the company has "secrets to success" that enable it to stand out.

Firstly, Salti remains family-owned and run by Guiot and his brother Jean-Christophe. In fact, the company used to bare the family name when it was created by his great-grandfather some 70 years ago.

Upon his passing, Guiot's grandmother led the company, alongside his aunt, uncle and his father. Guiot would then become CEO in 2009 and president in 2011.

"A family company doesn't think in months, it's a long-term vision," says Guiot. "We believe the family business character is an asset for a company like us. We try to invest regularly, even in difficult years, and that offers a good guarantee to our partners that we take our long-term decisions with a generational view and not by month."

The second secret, he says, is how the company treats its employees, with it investing significantly in improving the wellbeing of its some 500 staff.

The company, which recently announced revenues of €141 million for 2024, is of the belief that if its employees are happy, its customers are too, and that in turn means that growth will be maintained.

"There is no long-term success without overall performance of the ecosystem, and we invest a lot in our employees, but we also want to have great relations with our customers and providers. We want to take care of all the ecosystem that help us," he says.

An example of its commitment to staff could be seen last September, when the company hosted its 10th annual Wellness Week across 47 of its depots.

The week saw the company offer 292 sessions of massages, team-building activities, and collaborative workshops, all aimed at enhancing employee well-being.

It's initiatives like this that he believes help the company to differentiate itself in the marketplace. "A happy employee makes a delighted customer," he says.

He adds that Wellness Week is "only a sample" of its commitment to its staff and plays into its growth plans. "We want our employees to be happy to work with us," he says.

"By acting well with our employees, by acting well with the planet and our customers and by applying those 3 secrets, we believe there is a place for a third or fourth player on the market with high value of operating and we want to do great things.

"I think it's possible in every market you see, and we want to be this player on the on the French market."

JEAN-SEBASTIAN GUIOT, CEO and president of Salti.

> "A family company doesn't think in months, it's a long-term vision."

Green demands

Meanwhile, the company's focus on being at the forefront of the energy transition, its third secret, is not only behind its success, but is also its part in contributing to a more sustainable world, he says, with it actively trying to "fight against excessive consumption of natural resource."

For its part, the company has invested significantly in alternative powered options. Generally, around half of Salti's CapEx is on "green equipment", although investment in 2024 was higher at around two thirds as there is "so much demand and we need to accelerate the transition."

Looking ahead, by 2027 it aims to commit 50% of its CapEx on "more virtuous equipment." That would see it extend its fleet of greener options, which currently offers more than 200 units across platforms, forklifts, dumpers, loaders, excavators and more.

Guiot says, "Our fleet is already 55% green equipment, so Stage V, hybrid or electric. Two third of our purchases go towards green products and I think there's an urgency to limit the impact and we want to participate and to help our customers in the energy transition."

It's focus on driving the energy transition extends not only at a company level, but also through its involvement with external initiatives such as the CAMD.

Launched last year during Intermat, CAMD is made up of rental companies, OEMs and contractors and aims to work with the construction industry's trade federations to accelerate the environmental transformation of the construction equipment industry.

"I think the topic is so big, so broad, that I'm convinced that you cannot advance by your own," says Guiot.

"You cannot move forward alone with such a big subject, so to have the chance to bring together rental companies, users and manufacturers is a good >

opportunity to accelerate the decarbonisation of the industry."

However, he says cost is still a consideration among end users, which is another reason the CAMD initiative is driving value for customers in the energy transition.

"A company that doesn't care about those aspects won't be here in a few years and there is a huge demand on the market, but we need to work altogether to be sure to have power on site.

"There are so many questions around the transition that it's good to be able to talk at the same time with manufacturers and users, customers and rental companies. That's the idea."

The tech challenge

The energy transition makes up one of two important topics shaping the industry in France, Guiot says, "I think the two main challenges for our industry is of course, digitalisation and the transition. It seems to be very obvious, but it's so important for companies such as us.

"It's very, very important to me and we are doing a lot on that, mostly for our teams," he says.

"The idea is to have tools that are very easy and pleasant to use, and we have been able to reduce the development time and the way that we are training new employees. The system is easier to use, and we are trying to reduce down to using zero paper. It's not already done, but almost."

Salti employs a dual approach to technology. Internal systems are developed and managed in-house, focusing on core business needs. For non-core functions, like expense management, Salti partners with specialist providers such as Expensya.

On the customer-facing side, Salti is enhancing its extranet platform to simplify ordering processes and provide tools like carbon footprint reports.

Guiot highlights the importance of aligning digitalisation with customer and team needs, ensuring practical value to both.

Regarding AI, he remains cautious but optimistic, telling *IRN* that it "isn't important if you are not good in digitalisation."

Salti is a fourth-generation family-owned company.

The problems facing the market in France

Having ambitions to grow its presence in France organically is no mean feat, of course, especially with the housing market, one of the biggest drivers for rental companies there, dropping in 2024 and expected to do the same in 2025.

According to DLR, the French rental and distributors association, many of its members "remain concerned about the sector's future" despite strong growth in a number of segments.

The findings revealed that its construction equipment distribution members saw a sharp decline in sales of -15% in the third quarter of 2024.

For companies like Salti, which offers a fleet of what Guiot describes as middle and heavy equipment predominantly on a B2B basis, this means there is no fast-track approach to growth, at least for the short term.

"We'd like to go quicker, but we want to stay independent, so we need to go organically and very securely. We are still in 'crisis' in Europe and France, and we have to have a safe development to stay independent and to not to grow too fast," he says.

He adds that the Olympics in Paris last summer did offer some respite in the midst of the construction downturn, but that also brought about a slowdown on regular activity in the capital.

"It was quite good last year and the year before to have the new construction, but with the Paris Olympic games there were few new infrastructures, they were using the same infrastructure.

"We had more work with what they called Grand Paris, which was a rearranging of the city."

One growing market for the company is renovation construction, which has plugged the gap left by the declining housing market to some extent.

The solar industry is also proving fruitful for Salti, with demand in that sector for forklifts high.

Family ties

Given that one of the core secrets to the success of Salti is the family-owned, independent element, it's hardly a surprise that he says the long-term vision for the company rules out any talk of a sale or private equity involvement.

Instead, the Salti way is focused on organic growth, aided by depot expansion and a different way of renting.

With its "secrets to success" the company has already outlined its plans to solidify itself as a top player in France.

Further afield, he says it would be "great for the company to have an international perspective," but something like that is seen as more of a "middle term project" rather than an immediate focus.

For now, the company is set on continuing its development journey in France, perhaps as the third or fourth biggest player in the market... **IRN**

MORE VISIBILITY.
MORE CONTROL.

ON!TRACK

Ready to get more control over your equipment?

Hilti Runtime Tags deliver location and usage data for powered equipment, providing unparalleled transparency across your fleet.

In just a click, you can proactively track tools, predict maintenance and gain a complete equipment overview – from warehouse to jobsite.

Combined with the Hilti ON!Track app and Gateways, Runtime Tags help minimize downtime and maximize efficiency like never before.

Is hydrogen the next step?

Many access equipment giants have developed hydrogen-powered equipment using different approaches, but do they offer a viable alternative? Jeff Pao **investigates.**

Niftylift's hydrogen fuel cell-powered boom lift HR15.

Niftylift says the training for replacing hydrogen gas tanks is not complicated.

Hydrogen technology is steadily making its mark in the construction and equipment rental sectors, with companies across Europe and the UK exploring its potential to drive a more sustainable future.

From hydrogen-powered mobile lighting towers to fuel cell scissor lifts, the race to decarbonise equipment fleets is gaining momentum.

Haulotte's HS18 E PRO scissor lift is powered by a hydrogen fuel cell.

PHOTOS: HAULOTTE

France-based Haulotte's journey to adopt hydrogen energy began in June 2022 when it announced a collaboration with Bouygues Energies & Services, a subsidiary of Bouygues Construction, which completed the acquisition of hydrogen solutions specialist Equans in October of the same year.

"Haulotte decided in 2018 to switch all its machines to electrical mode," Benoît Baleydier, project manager at Haulotte, tells *IRN*.

"The electric HS18 E was launched in 2021 from what was historically a diesel machine. We had a removable diesel range extender on it."

According to Haulotte's website, the diesel range extender is a removable power generator that can recharge a scissor lift's battery to 80% in three hours.

Following the partnership with Bouygues, Baleydier says the removable diesel range extender can now be replaced with a hydrogen fuel cell version, which is the same size and has the same electricity generation capability.

France-based Haulotte's HS18 E PRO scissor lift was used for the first time at the Saint-Cyr-l'École military school near Paris in October 2024.

Site regulations

Haulotte used the hydrogen range extender on site for the first time in October 2024 on its rough terrain HS18 E PRO scissor lift at the Saint-Cyr-l'École military school near Paris. Equans is the hydrogen gas supplier for this trial program, which commenced in May 2024.

"Technically speaking, the hydrogen fuel cell technology is mature. But today's regulations are not mature enough," Baleydier says. "Today, we only deal with the regulations for one machine prototype and construction site. But we cannot deal with the regulations for tomorrow's mass production because they are too complicated."

He adds that current regulations and safety guidelines for storing hydrogen gas on construction sites must be updated before it can be used effectively.

In addition, says Baleydier, "From an economic point of view, the fuel cell technology is too expensive to justify the costs of its usage today.

"We are now working with several suppliers to find out how to reduce the costs of this technology."

He adds that Haulotte hopes to make some progress in lowering the costs during 2025.

"One thing we know is that there will not only be one energy source in the future," he says. "We want to be sure we will be ready for the future, so we launched this project to check the regulations, technical issues, and market response."

Long refuelling time

Since the Haulotte-Equans trial program began in May, many customers have been amazed that a hydrogen fuel cell can replace a diesel engine as a range extender

PHOTOS: NIFTYLIFT

Speedy Hire launches industry's first decarbonisation tool for customers

Speedy Hire has launched what it describes as the industry's first 'Diesel-Free Matrix' to support its carbon management initiatives for customers.

The solution is designed to manage hire contracts at a project level, allowing customers to make measurable progress in reducing diesel reliance and advancing decarbonisation across their sites.

It unveiled the system on 28 November during the Speedy Hire Live Sustainability Summit, a virtual event hosted by the company.

According to Speedy, the Matrix enables decision-making around innovative technologies, such as hydrogen power units (HPUs), to help customers meet sustainability targets while benefiting from new energy solutions.

It will help decarbonise the construction projects, including HS2, the Lower Thames Crossing, and National Highways projects.

Speedy Hire said it was the first rental company to adopt PAS2080:2023, the latest standard for managing carbon in infrastructure.

"By adopting PAS2080:2023 with third-party verification next year, we're setting a new benchmark in the hire industry," said Amelia Woodley, ESG Director at Speedy Hire.

"The Matrix supports our customers in their sustainability journeys and strengthens our ESG leadership, creating lasting, positive change across our sector."

She said launching the Diesel-Free Matrix is pivotal to achieving the company's commitment to a sustainable future with its 'Decade to Deliver' strategy.

In 2023, Speedy Hire launched its ambitious 'Decade to Deliver' roadmap to reduce Scope 1 and 2 emissions by 50% and Scope 3 emissions by 42% by 2030 and to reach net zero by 2040, a decade ahead of the UK government's deadline.

Speedy Hire's Diesel-Free Matrix allows customers to make measurable progress in decarbonisation. PHOTO: SPEEDY HIRE

to increase the autonomy of battery machines, Baleydier says.

"The only thing they ask us to improve is the time for refueling the machine.

"They told us that this is acceptable for an experiment, but we need to improve the refuelling system for mass production and daily use."

Equan developed the refuelling system without an intermediate tank due to regulatory constraints. According to Baleydier, recharging will be faster once the refuelling system can pressurise hydrogen from 200 to 400 bar in advance and store it in the intermediate tank at about 350 bar.

He says Haulotte had considered using removable hydrogen gas tanks in its range extender but did not pursue it because this would require qualified staff to change the tanks frequently.

Elsewhere, in June 2023 UK-based rental firm Speedy Hire and MEWP manufacturer Niftylift launched the world's first hydrogen-electric powered access platforms, HR15E and HR17E.

According to Speedy Hire, the two machines can typically be operated for up to five days on a single electric charge, with significant additional >

UK business hits hydrogen milestone

Sales director Joe Ambor (left) and operations and development director Jim Irvine (right). PHOTO: TCP

UK-based manufacturer and plant hire company TCP Group has reached the milestone of operating a fleet of more than 500 hydrogen fuel-cell mobile lighting towers.

The product of a 2010 partnership between TCP and UK gas provider BOC, the TCP Ecolite TH200 is powered by a HYMERA fuel cell that is said to create green energy from a chemical reaction between bottled hydrogen and oxygen in the surrounding air.

The partnership replaces diesel fuel with hydrogen fuel-cells in lighting towers with the aim of transforming lighting solutions for site operations.

At the same time, the unit is fitted with Prismalence lenses, which is said to create "controlled light distribution", low glare and good visbility.

IRN was told that the majority of the units available for rent, which are all manufactured by TCP, have been converted from old diesel-powered units.

Jim Irvine, operations and development director, TCP Group, said, "The TCP Ecolite TH200 (hydrogen fuel-cell mobile lighting tower) is an increasingly popular choice where temporary lighting is required and as companies look for clean energy solutions to reduce carbon emissions. We have an ever-growing demand for this particular lighting tower, and we committed to the provision of 500 towers by July 2024.

"With large infrastructure projects moving forward, such as Sizewell C and the Lower Thames Crossing, this temporary lighting solution is the No.1 choice, as they are silent running, no spill risk and zero emission at point of use."

Joe Ambor, sales director, TCP Group, added, "We have steadily grown the fleet of hydrogen mobile lighting towers in recent years. As a company faithful to recycling where possible, we have remanufactured hundreds of our diesel-powered lighting towers to use hydrogen fuel-cells and gas cylinders.

"Our added value is to provide a fully managed gas service. Gas usage is monitored remotely and when a hydrogen gas cylinder needs exchanging, the TCP team make arrangements with the customer to replace the empty cylinder with a full one and then take the empty one away."

range available from the hydrogen fuel cell.

Niftylift said hydrogen combution is only 25-35% efficient in energy conversion, but a hydrogen fuel cell can be as high as 60% efficient. It added that refueling is straightforward - connect to a G20 Hydrogen bottle to fill up the fuel cell.

"We use removable tanks," Tom Hadden, Technical sales manager at Niftylift, tells *IRN* in an interview. "Once you've depleted the cylinder, you can change it like a gas barbecue.

"A level of training is required, but it's not that you have to do a 10-day course on this," he says. "In competency-based training, you can be trained within a morning.

"All the connections we use do not involve tooling as they're either hand-tied or push-fit connectors," he adds. "You don't have to have a mechanical engineering degree to change your cylinder."

Hadden says many larger utilisation-type products, such as earthmoving excavators, have adopted hydrogen combustion engines, and most industry players are not planning to build hydrogen combustion engines smaller than 50-55kW.

"This takes us out of that market as we only use 19kW engines, but then we realise we don't need it," he says, adding that an excavator operator digs and moves all day while an access platform operator only needs to move into a position and go up in the air to stay there for an hour or two.

While Niftylift has ruled itself out of hydrogen combustion and decided to focus on hydrogen fuel cell technology, the initial lack of industry standards and governing body guidance on hydrogen fuel cells in machines remains a key challenge. Besides, says Hadden, there are not many fuel cell suppliers worldwide.

"We are looking at extending our range in 2025," he says. "We have spoken to another fuel cell supplier and agreed to do an urban development program."

Niftylift is seeking fuel cells with larger outputs to cover all its self-propelled lift platforms from 12 to 28m, he says.

New hydrogen projects

Other access equipment makers also plan to launch new hydrogen fuel cell-powered products in 2025.

Manitou Group, the French manufacturer of telehandlers and aerial platforms, tells *IRN* that it will have something new to show at the Bauma trade show in Germany in April 2025.

In December 2022, the company unveiled its first prototype hydrogen fuel cell telehandler, based on an existing model with a 14m height range. It says the production of a 100% hydrogen-powered telehandler will be ready by 2026.

The company also set up a hydrogen station to test its prototype telehandlers for range and reliability in real-life conditions. It says it would offer its electric and hydrogen ranges side-by-side, aiming to have 43% of its products be low-emission machines by 2030.

"The green hydrogen sector is gradually becoming more established with the entry of a number of players into this market," says Julien Waechter, vice president of R&D at Manitou Group.

"All of the aid mechanisms proposed by the different governments will encourage the transition to hydrogen and will speed up the development of the distribution network and ultimately the reduction in the usage costs of our machines using this energy." **IRN**

Manitou unveiled its first prototype hydrogen telehandler in December 2022. PHOTO: MANITOU

Trackunit

PASS

Next Generation Pass K300

Pass. A new era of Access Management

Versatile Access

Flexible Policies

Equipment Sharing

Let’s connect to find the right solution for your business.
Unleash next generation Access Management and equipment sharing solutions that unify jobsite safety and new business potential.

Please visit www.trackunit.com for more information

Stability in Spain?

Confidence among rental companies and OEMs in Spain is growing. Lewis Tyler **finds out why.**

PHOTO: BOMAG

Lorenzo Wakonigg, former managing director of Maquinter – on left – with Jonathan Stringham, Bomag vice president of sales and marketing.

When *IRN* visited Spain last year the sentiment among OEMs was that demand from rental companies was stable, perhaps surprisingly so given rising interest rates and a weaker than usual construction market.

In fact, the ERA/*IRN* RentalTracker survey found that at the end of the fourth quarter of 2024, 69% of respondents from Spain said they were experiencing improving market conditions (see the full results on page 14).

That sentiment is backed up by aerial platform association for Spain ANAPAT, which tells *IRN* that in general, the rental companies in Spain expected "good financial numbers" for the 2024 financial year, backed up by a growing economy.

It's a good sign, of course. If an economy is growing, projects can go ahead. If there are projects, there is demand for equipment, and if there is demand, there is the stability required for OEMs to innovate.

In that respect, the OEM landscape in Spain is vast, offering everything from earthmoving equipment, scaffolding and generators to smaller, more niche equipment such as rack and pinion hoists.

It was the view of many companies that we visited in 2024 that demand for these more niche products was better in 2024 due to a rise in home construction projects.

Niche demands

In terms of those niche products, lighting tower and genset manufacturer Himoinsa counts itself in that bracket, which is one of the reasons the company believes that it managed to navigate the challenges of 2024.

The company tells *IRN*, "2024 has been a good year for Himoinsa globally. We have reached our growth goal in the different business unit. The Mobile Power business unit has grown significantly.

"We are developing new products for this market niche, and we are positioning as a strategic partner for rental companies offering a complete power product for their fleets."

Focusing on market trends in Spain, Himoinsa highlights two areas of focus for customers: digitisation and monitoring and sustainability and electrification.

It says, "Companies are adopting advanced technologies to optimise processes and improve operational efficiency using, for example, remote fleet monitoring systems.

"There is a growing demand for cleaner and more efficient energy solutions, driven by environmental regulations and consumers' ecological awareness."

In addition, it says the construction of renewable energy-related infrastructure, such as solar and wind farms, is becoming "increasingly important" and is contributing to the expansion of demand for lifting and handling rental equipment.

"Expectations are positive, as the drive for renewables is leading to continued investment in new infrastructure," it tells *IRN*. "As public policies continue to support the energy transition, this will keep demand for rental equipment active."

In the case of compaction and road equipment manufacturer Bomag, a subsidiary of French construction and industrial firm Fayat Group, increased demand in Spain was one of the reasons that the company decided to establish a subsidiary near the Spanish capital of Madrid in August last year.

The new subsidiary, named Bomag Ibérica de Maquinaria, follows Bomag's deal to acquire Maquinter, a dealer of its equipment since 1993.

Market potential

Dr Ingo Ettischer, president of Bomag Group, explains the reasoning behind the move; "We have enjoyed a successful and cooperative partnership with Maquinter for over 31 years. We see great potential and increased demand for the future in the growing Spanish market.

"By integrating Maquinter into our

An under construction church in Barcelona, Catalonia, Spain. PHOTO: PRN. STUDIO VIA ADOBE STOCK

organisation, we are strengthening our position in the long term and further expanding our presence in the asphalt segment in the region."

Another international player made a similar move just a month later, when Italy-based Multitel Pagliero announced that it was setting up a subsidiary in Spain to enhance its presence in Europe's fifth largest market for truck mounted platforms.

The company will be based in Barcelona, forming part of the newly-established Multitel Iberica S.L, and manage sales directly in the country, along with after-sales service and spare parts.

"The new branch will fully reflect the Multitel Pagliero style and policy established in recent years," said Roberto Marangoni, Global marketing and International Sales Director Multitel Pagliero.

The strategy includes models specifically designed for the Spanish market, a stock of machines ready for delivery, the availability of all related services and greater proximity to the customer.

Rental focus

As for rental companies, 2024 brought about a number of challenges. One of the biggest challenges is the skills shortages, says ANAPAT, with demand for mechanics high in the industry.

Again, this is backed up by the RentalTracker Survey, which found that 55% of companies intend to employ more staff.

One of the big players in Spain, GAM Rentals, is one of those companies that have found the retention and attraction puzzle difficult to overcome, as it tells *IRN*; "The difficulty in retaining and attracting qualified workers remains a major concern for companies, mainly due to the shortage of profiles and the commitment that companies have with sustainability. In this context, adapting to the new customer demands and market needs has been crucial.

In terms of growth, the company says 2024 was very much mixed, with activity and business levels good and strong growth in demand in some sectors.

However, it notes that the financial outlook has been marked by several challenges, notably due to "the increase in financial costs resulting from high interest rates, which has affected our profitability."

Additionally, it says operational costs, especially related to logistics, supplies and fleet maintenance

Digitisation and sustainability are two focus areas for customers, Himoinsa says. PHOTO: HIMOINSA

have also had an impact. Although, it says that its strategy "remains strong and we are focused on maintaining long-term sustainable growth."

ANAPAT adds that one of the market trends it is seeing is a growing number of international players entering the market, such as Kiloutou, Boels and Loxam due to the growth of the economy. This, it says, is "driving market concentration."

In fact, you only have to go back to October 2024 to find a significant entry from an international company, with Kiloutou acquiring ToolQuick Alquiler, adding 30 branches to its footprint in Spain in the process.

The company followed that deal up in December with the purchase of two rental acquisitions (see box story).

Future outlook

Looking ahead to 2025, ANAPAT expects the high investment of the post-pandemic era to decrease in the second half of the year, mirroring the slowdown in central Europe at the time of writing.

Meanwhile, Himoinsa is of the view that although it has seen several years of "strong investment from rental companies in Spain, a predicted growth of the construction sector will likely mean that the demand will be maintained throughout 2025.

It also cites a preference for rental over purchase by construction companies, the renewal of the rental fleet in search of greater efficiency and compliance with new regulations as reasons why it is expecting high rental investment.

Elsewhere, GAM is expecting activity to remain high in the construction sector in the coming years, especially in renewable energy where investment in rental machinery and equipment is more than necessary. **IRN**

Kiloutou acquires Liftisa and S.L. Gloobal Movingrent

Kiloutou acquired Toolquick Alquiler last year. PHOTO: TOOLQUICK

Kiloutou has acquired low-height specialist Liftisa S.L. and truck mounted platform company Gloobal Movingrent S.A.

The deals, for undisclosed prices, will give Kiloutou six further rental locations in Spain, in Barcolona, Valencia and Madrid, where each company has depots.

The two companies had a single owner, Ivan Papell, a veteran of Spain's access rental business, who was CEO of both.

Liftisa was founded in 2011 – although the brand has existed since 1989 – and its 80 staff manage a fleet of more than 2,000 lifts.

Gloobal was founded in 2015 and specializes in short- and long-term rental of vehicle-mounted platforms and cranes. It has 30 staff and has a fleet of more than 550 vehicles.

Kiloutou said the Liftisa and Gloobal teams will manage the commercial development of this new range of equipment throughout Kiloutou's national network in Spain, which comprises 56 branches and 400 employees.

Cyril Brillouet, managing director of Kiloutou Spain, "We seek to add expertise and leadership in the rental of platforms for working at height, and the acquisition of these two companies perfectly meets these objectives.

"We aim to achieve leadership in these three communities and extend it to other regions. Our goal at Kiloutou is to support their growth strategy by combining our offerings in the Spanish market and sharing our teams' market knowledge."

Ivan Papell added; "I am very pleased and proud to announce the acquisition of our two companies by Kiloutou. Both projects are very solid, ambitious, and have strong potential.

This new step, in addition to consolidating their position, will allow our teams and projects to continue their strong growth while benefiting from Kiloutou Group's services and resources, enabling new and additional investments and expansion throughout the rest of Spain."

Better times ahead?

With sentiment for 2024 pointing towards an industry waiting for better times, what is the outlook for 2025?

As the equipment rental industry enters 2025, companies are preparing for another year of growth—one that will also bring new challenges and emerging trends.

But what are those challenges, and how will companies look to overcome them? Will changes to customer behaviour drive the energy transition? Will technological advancements streamline the rental process? Will economic uncertainties ease and allow for further growth?

IRN spoke with industry experts to understand their expectations for the year ahead.

Market trends

Looking at North America, equipment rental firms are expected to see slower growth in rental revenues in the next few years as the markets in the United States and Canada continue to soften.

Research from the Canadian Rental Association (CRA) states that Canada will enjoy moderate growth in the coming years due to rising demand from the non-residential construction sector.

Just last year the CRA predicted Canada's equipment rental revenue to increase by 7.6% to $8.2 billion (€7.7 billion) in 2024, but the year-on-year growth rate will ease to 6.8% in 2025.

"The outlook for Canada's equipment rental industry reflects a balanced growth trajectory that will benefit from continued strength in the construction and industrial sectors," said Melanie Misener, executive director of the CRA.

"As Canada's economy stabilises, we expect steady demand across residential and non-residential investment, further fueling growth in equipment rentals."

Equipment rental in the US and Canada is expected to see moderate growth in the coming years.

Jon Overman, CEO of operations, HSS: The Hire Service Company.

As for the US, economic figures also reveal that the growth of the rental sector in 2025 would probably come from the residential construction sector instead of the non-residential one.

The American Rental Association (ARA) expects equipment rental revenue to increase 5.7% year-on-year in 2025.

The ARA said the construction and industrial sectors are expected to see the lowest growth in the coming years while general tool hire will remain stable.

It said the rental revenue growth rate in the construction and industrial sectors is expected to ease from 7.9% in 2024 to 3.6% in 2025.

At the same time, Oxford Economics has said that a combination of fiscal stimulus, curbed immigration, increased tariffs and other policy decisions are likely to impact construction under US President Trump.

Its economists forecast that US fiscal expansion in the form of tax cuts, interest rate cuts, and higher federal spending in areas like defence would likely support privately funded construction activity in the near term.

Oxford Economics expects fewer rate cuts in 2026 amid higher debt and

According to Coates, standards will drive demand for sustainable solutions.

> "The UK rental market remains one of the most mature in the world."
>
> **JON OVERMAN, CEO of operations at HSS Hire.**

inflation expectations. It warned that higher rates could spill into other economies and, over the longer term, weigh on investment and construction activity.

Tackling the energy transition

In the UK, market maturity and competition are key considerations. Jon Overman, CEO of operations at HSS Hire, highlights how the industry will need to focus on efficiency and customer service; "The UK rental market remains one of the most mature in the world, and with that longevity comes a wealth of established hire companies. A highly competitive market coupled with a weaker economy means we are all going to need to be on our 'A' game with customers."

Supporting that customer focus, Overman believes large UK rental companies will increasingly partner with builders' merchants to offer a more complete service; "We're already doing this and have been for quite a few years, proudly partnering with more than 20 different builders' merchants around the UK."

At the same time, he says cost efficiency remains a priority. "With the economy as it is—and in the wake of recent government policy changes on NMW and NI—being efficient in our operating models and cost structures will be important for the whole industry throughout 2025," he adds. While economic trends shape rental revenues, another pressing issue for rental firms is the shift towards sustainable equipment.

A Sunbelt battery energy storage system (BESS).

According to Mark Keily, Health, Safety & Sustainability director at Sunbelt Rentals, the company is expecting customer behaviour to continue to evolve in 2025, with a growing focus on sustainable practices and alternative power solutions.

He says, "While there's still work to be done in raising awareness about the operational benefits of sustainable equipment, we expect 2025 to be a turning point as more customers explore greener options and trial more sustainable solutions. This shift will likely include a greater adoption of renewable fuels."

Of course, the energy transition has been a key point of discussion for Sunbelt in recent years, as was referenced in its Sunbelt 4.0 plan.

With the plan, Sunbelt aims to make its sustainability initiatives a boon to its bottom line by using it to place more emphasis on customers.

The company has previously stated that it is ahead when it comes to sustainability initiatives, and is on track to exceed targets laid out in its Sunbelt 3.0 plan.

Moving forward, it has set new targets for Scope 1 and 2 to be 50% by 2034 from the 2024 baseline.

Keily elaborates on the company's sustainability plans, "Sustainability and the energy transition have been key in shaping our strategy for the upcoming year. As part of our 4.0 growth strategy, we've been investing in sustainable equipment for many years and remain committed to continuing this.

"While we recognise that challenges remain in the industry around the adoption of greener and more sustainable equipment, we're actively working to address these by focusing on practical and actionable solutions for our customers, suppliers and partners.

He adds that includes providing education around sustainable solutions at its Green and Innovation days, working with customers on their net-zero strategies, trailing new innovative technology and offering renewable fuels to the industry, as it has done with its HVO partnership with Kier.

Driven by standards

This focus on sustainability is echoed in Australia, where Coates is adapting to new regulations and evolving customer expectations. That's according to Robyn Simpson, national manager - environment & sustainability at Coates, who says that the implementation of the Australian Sustainability Reporting Standards (ASRS) is set to drive collaboration between suppliers and construction customers.

According to Simpson, stakeholders will be seeking to understand, prioritise and reduce greenhouse gas emissions (GHG) in their value chain throughout 2025.

Simpson tells *IRN*, "Coates offering hire of high-efficiency, low associated embodied emissions equipment supports our customers' GHG emissions reduction. Equally, our expert solutions in specialist and general hire support customers with tailored processes and fleet to reduce energy and liquid fuel costs in construction."

To meet demand, the company is working across a range of categories to strategically transition its fleet.

"Lighting is a key category on the way to decarbonisation, together with increasing hybridisation of power generation with multiple benefits including reduced noise and particulate pollution," he adds. "Temporary site accommodation, typically one of the >

PHOTO: KENNARDS HIRE

Kennards says its digital transformation focuses on enhancing experiences.

highest energy users on a project site, is being tackled with a range of more energy-efficient solutions, augmented by renewables and hybrid power sources.

In terms of its own footprint, Simpson adds that "Coates has significantly reduced its own energy and emissions footprint by investing in solar PV and battery systems for our branch network across Australia."

"This has helped drive down Coates' GHG emissions footprint by circa 30% since 2020, demonstrating the potential of renewable energy in delivering operational cost reductions," he says.

Its Australian counterpart Kennards Hire agrees that demand for eco-friendly products is growing rapidly.

Nathan Venables, general manager, Fleet, says, "Battery, solar, and hybrid power solutions are becoming more accessible, efficient, and cost-effective, making them a viable alternative to traditional diesel-powered generators for many sites.

Additionally, he outlines the role that technologies like AI, IoT, or advanced fleet management systems play in operations; "Kennards Hire's digital transformation focuses on enhancing customer and employee experiences using digital tools. Our approach involves leveraging AI, IoT, and advanced fleet management systems to address real business and customer challenges.

"As early adopters of IoT, we've improved operations, particularly in transport and logistics, reducing vehicle numbers, kilometres travelled, and emissions."

The broader view

As for its expectations for 2025, he says the company is seeing economic, and product cycles play out at country, state and local levels, with "significant improvement in the supply chain" and availability of new stock getting back to pre-Covid levels. Additionally, he notes substantial improvement in parts and consumables supply. However, he says demand for skilled labour continues to outpace supply.

Looking at 2025 from more broadly, *Access International's* Confidence Survey of manufacturers, rental companies and end users revealed a steady outlook for the year. The survey's Confidence Index is almost the same as last year's figure at 66.

This compares to the index's highest level in recent years of 68, recorded in 2021, as restrictions around the Covid-19 pandemic lifted, following a low of 64 in 2020 that had not been seen since the years following the credit crisis of 2008. In this respect, while confidence has dropped it is higher than previous periods of instability.

The five-year outlook reflects the rest of the graphs in the survey, which are based on forecasts for 2025 only.

Looking at prospects across all sectors covering manufacturers, rental companies and end users for the year ahead, expectations are marginally down on last year. A majority of participants (50%) are forecasting growth of 0-10%. However, the percentage forecasting more than 10% growth has halved.

On the subject of rental companies, the expectations of growth and declines are very similar to last year's figures, although 48% say they will make investments in new equipment compared to 37% this time in 2023. **IRN**

An aerial view of Bauma 2022.

Meet up in

As Bauma draws nearer, more details of what to expect at the show have been revealed by organisers and exhibitors. Lewis Tyler **reports.**

A Bauma year always feels different. No matter what challenges the previous 12 months have brought, the return of one of the largest trade shows in the world always brings a sense of optimism with it.

For the construction industry, Bauma offers a chance for companies to showcase their latest developments in equipment, technology and services.

With the show just months away, we are getting a sense of what to expect from both organisers and exhibitors.

According to organisers Messe München, central to the show this year will be five key topics: climate neutrality, alternative drive concepts, networked construction, sustainability and mining.

Reflecting the above, the organisers have confirmed that the Bauma LAB0 will be a highlight and will act as a "melting pot of industry, science and the start-up scene."

Located in Hall B0, LAB0 is open from April 7 to 11 and will include keynotes, panel discussions, exhibitor contributions and individual talks, which Messe München says will offer a "360º view of current topics in the construction machinery and mining industry."

The five areas of the hall are: Bauma Forum, Start-Up Area, Science Hub, VR Experience and Machines in Construction 4.0.

Further reflecting the key themes, all finalists for the Bauma innovation awards 2025 have also been announced in the five categories that the awards are held in.

The five categories are: Climate protection; Digitalisation; Mechanical engineering; Building; Research.

The awards take place the day before Bauma. The prize is non-material and not linked to prize money.

On the Bauma website it states that, "The jury primarily assesses the future viability and practical relevance of the innovation. Additional attention will be paid to the significance for climate protection."

Some of the Bauma 2025 innovation award finalists include Bomag, CNH Industrial, Kobelco, Wirtgen Group, Hamm and Yanmar.

What exhibitors are bringing

By the time this issue reaches the hands of readers, journalists will be preparing for Bauma Media Dialog, a two-day event where more than 130 exhibitors will provide updates for their plans for the show.

Of course, even this far out companies are already making plans, and some have confirmed details of what to expect on their stands when the doors swing open on April 7.

Hitachi Construction Machinery Europe (HCME) says it will show a series of machines from its ZW-7 wheel loader and ZXW-7 wheeled excavator ranges.

On the stand, visitors can see the ZW180-7 and ZW310-7 wheel loaders. These are described as some of the safest machines on the market due to the all-around visibility, which is supported by features such as the narrow engine hood and the Aerial Angle camera system, which provides a 270-degree view of the jobsite.

In addition, sensors to the rear of the vehicle alert the operator if there is anything behind the machine.

Both models feature Stage V-compliant engines,

bauma

WHEN: Monday 7 – Sunday 13 April 2025
WHERE: Messe München trade-fair centre, Munich, Germany
OPEN: Monday to Friday 0930 to 1830
Saturday 0830 to 1830 & Sunday 0930 to 1630

bauma.de/en

IMAGES COURTESY OF MESSE MÜNCHEN GMBH

Munich

Wacker Neuson machines are tested at the last edition of Bauma.

which deliver very high efficiency that helps to reduce total cost of ownership.

Productivity is further enhanced with very fast cycle times, which also improve overall fuel efficiency. An approach speed control helps to load trucks more accurately, saving additional time and money.

The wheel loaders will be joined by the short-tail swing ZX135W-7 and ZX175W-7 wheeled excavators.

Also on the stand, Hitachi will show the largest machine in the range, the ZX220W-7. At Bauma, all three machines will feature two-piece booms.

Each of these wheeled excavators uses the HIOS hydraulic system to deliver increased operating speed and improved productivity.

The new ECO gauge allows operators to monitor fuel efficiency in real time.

Both the ZX135W-7 and larger ZX155W-7 use the same engine. Each machine has a 360-degree swing radius (1,740mm to the rear and 1,750mm at the front) for operating in confined spaces.

Wacker Neuson says that following the success of its stand in 2022, it expects to make small changes to the general concept this time round.

The company has taken a 5,000sqm stand, on which it says it will display its "comprehensive product portfolio, practical services, for example in the areas of used equipment, rental, financing and aftermarket as well as digital solutions and zero emission."

Wacker Neuson says it will have "various news" in the above fields come April, when it will exhibit alongside its subsidiary Kramer.

Stefanie Wieland, director corporate marketing, Wacker Neuson Group, says, "For us Bauma is the most relevant trade show and trend barometer for the entire industry. Not only is it the world's largest show, it also is THE place to exchange with our customers, to see the latest trends and developments, and to get a feeling about where the business is heading."

Wirtgen Group, alongside John Deere, will be taking a huge, 13,000sqm exhibition space at the show.

Show surprises

Wirtgen Group, appearing alongside John Deere, will once again be taking a huge, 13,000sqm exhibition space at the show.

The company expects to showcase more than 90 exhibits for a range of different applications, including several world premiers and innovations. Machines under the Wirtgen, Vögele, Hamm, Kleemann, Benninghoven and John Deere banners will all make an appearance.

"We are already excited to hear feedback from our customers and we are looking forward to engaging discussions," says a spokesperson for Wirtgen. "The direct contact with our partners, the face-to-face communication and exchange of ideas is still essential to our business."

"Bauma is the ideal platform for Wirtgen Group to >

Hitachi says it will show its ZW180-7 wheel loader and has hinted at some surprises for Bauma. PHOTO: HCME

not only present our newly developed machines and technologies but also put them directly on the market," they add.

Carl Slotte, head of region, Europe, for Volvo CE also considers Bauma an important platform to meet with customers, partners and other stakeholders from all over the world and particularly the German market.

Volvo wants to use the show as an opportunity to drive the company's reputation for innovation and sustainability. "Our total solutions approach will show customers how we can help them to decarbonise their businesses while maintaining high productivity," says Slotte.

The manufacturer has taken a 2,000sqm stand and Slotte will only go as far as saying that it will demonstrate its latest services, solutions and technologies there. "But the rest will remain a surprise," he says.

In the case of Zeppelin Rental, part of Zeppelin Group, the company says it is one show that it always looks forward to.

Speaking to *IRN*, Peter Schrader, managing director and COO of Zeppelin Rental, says, "I love Bauma and I'm absolutely convinced that we can offer our customers and everybody something interesting."

He says the next edition will be "a little bit different to the last Bauma," with the company returning to its familiar outside spot.

"At the moment we are working on that and also on the projects that we want to present to the customer. I think it will be very interesting for everybody to visit."

Sustainability on show

The larger theme of sustainability will be reflected on the Liugong stand, according to Hakan Ilhan, vice president of Liugong Europe.

Ilhan says, "Our product's strength lies in the depth and breadth of our offerings in the mining sector. We are committed to establishing a competitive and supportive organisational structure.

"Another important aspect is the electric vehicle segment. We also focus on aggregates, demolition, and recycling. These are the main areas where we aim to customize our products and offerings."

On the access front, spider lift and truck mount producer CTE has decided to maintain the same design and configuration as previous editions. "The size of our stand allows us to showcase a wide range of products and create a more immersive experience for visitors," the company says.

"Bauma is one of the most important events for our company and the wider aerial platform industry.

"Given the current international socio-political landscape, we remain optimistic that the market is ready to welcome a trade fair like Bauma. The industry has shown resilience and adaptability in the face of recent challenges, and there is a growing demand for innovation and collaboration."

The company's core focus will be to strengthen its relationships with its customers and operators in the industry.

"For us at CTE, despite the rise of digital communication, face-to-face meetings remain crucial building strong relationships, fostering trust, and closing deals."

CTE's main theme will revolve around innovation and customer focus and include new equipment that will be on the market in 2025. **IRN**


Rental BRIEFING
GLOBAL RENTAL INSIGHT - EVERY DAY
Make the
best decisions
for your business
Sign up for our Rental Briefing today and gain access to high-quality analysis of key issues and global best practices. Our briefing is designed to help you make the best decisions for your business and stay ahead of the competition.
Don't miss out on this valuable resource that will help your business thrive!
Rental BRIEFING
GLOBAL RENTAL INSIGHT - EVERY DAY
5 things driving an acceleration in wind energy construction projects
Neil Gerrard
From Our Partners
Off-Highway RESEARCH
Off-Highway Conference
SIGNING UP IS QUICK, EASY AND FREE... JUST SCAN THIS QR CODE
CREATED BY
INTERNATIONAL rental NEWS
POWERED BY khl

Innovation in focus

The Executive Hire Show returns in February, with organisers expecting "innovation, connection, and inspiration."

A lot has happened in the UK since the last Executive Hire Show (EHS) took place some 12 months ago, most notably the ushering in of a new Government and a subsequent budget impacting companies negatively and positively.

However, if you are to speak to the organisers and attendees of the Executive Hire Show, this year's event is one of the most highly anticipated, pointing towards an industry in forward thinking mode.

That is certainly demonstrated in the fact that stands have been fully booked since November (see box story).

Taking place at the CBS Arena, the show is now in its 18th instalment, having first been held in 2007.

According to Chris Moore, Executive Hire Show director, the event has become a key date in the calendars of many OEMs and suppliers in the UK, "The Executive Hire Show has become an essential event for the hire industry. With a sold-out exhibition, exclusive deals, and the Passionate Hire Awards at the Networking After Party, it's the perfect opportunity to connect, celebrate, and shape the future of hire."

What to expect

Previous editions of the show have typically reflected the challenges of exhibitors and attendees alike through its themes, and this year is no different, the organisers have said.

A challenge facing many companies within the UK is of course the energy transition, and the suppliers and hirers will be able to explore the latest electric and hybrid machinery advancements, alternative power options and sustainable site solutions at a time when sustainability and efficiency are the watchwords.

In that respect, the return of the Innovation Trail will be welcomed by many visitors in 2025, which highlights advancements in eco-friendly technologies.

As for the exhibits this year, UK-based Kaeser Kompressoren equipment supplier HPC Compressed Air Systems will show the new HPC Kaeser Mobilair M44, a Stage V compliant compressor that Kaeser said "bridges a market gap by offering portable compressed air systems that combine high performance with a compact, eco-friendly design."

Delivering an output of 4.1m^3/min at an operating pressure of 7 bar, the Mobilair M44 sits between Kaeser's existing 3m^3 and 5m^3 units and is described by the company as a "powerful, compact, and environmentally friendly solution" for the European market.

The unit is powered by a Kubota diesel engine with a diesel particulate filter and comes with optimised power management and a low maximum engine speed of 2500rpm that Kaeser said delivers "outstanding fuel efficiency and minimal emissions."

The machine also features Sigma Control Smart controller to make operation easier. With this, maximum pressure can be adjusted in 0.1-bar increments between 6 and 7.5 bar at the touch of a button.

Tyrolit will show its new Floor Grinding & Preparation range, which it said is offering customers a complete solution from a single source.

Point of Rental Software's Syrinx 365, now available as a cloud-hosted solution, will be discussed.

The company said it gives hire businesses easy access to the latest, most feature-rich, and secure software version—without the hassle of manual updates.

Highlights include a global search bar, customisable dashboards, and a public API for integrating accounting software and ecommerce platforms.

Secure payment processing and mobile apps reduce errors and improve efficiency, while UK businesses can benefit from tools to achieve Cyber Essentials accreditation.

Atlas Copco will unveil its ZBP 120-120 energy storage system.
PHOTO: ATLAS COPCO

First look exhibits

Compact crushing machine manufacturer Dragon Equipment is to showcase its CR450 Diesel Crusher in-person for the first time since it launched last year.

Powered by a Kubota D722 19hp diesel engine, the CR450 offers higher torque and increased output, crushing through even the hardest materials for over 12 hours thanks to its 33-litre fuel tank.

With a 460mm x 205mm Hardox jaw and remote-control capability, the CR450 is designed for maximum productivity and safety, perfect for tough-to-reach sites. All-terrain tracks and a compact 970mm width improve onsite stability, while its lightweight build ensures easy transport alongside an excavator.

EXECUTIVE HIRESHOW
WHERE PASSIONATE HIRERS MEET INNOVATIVE SUPPLIERS
12 & 13 FEBRUARY 2025 COVENTRY BUILDING SOCIETY ARENA

Event details

WHEN: 12th and 13th February
WHERE: CBS Arena, Coventry, UK

www.executivehireshow.co.uk

Prolectric will reveal its patented lighting tower technology for the first time.
PHOTO: PROLECTRIC

Dragon Equipment is to showcase its CR450 Diesel Crusher in-person for the first time since it launched.
PHOTO: DRAGON EQUIPMENT

Exhibitor space at the show sold out in November. PHOTO: EHS

UK-based Kaeser Kompressoren equipment supplier HPC Compressed Air Systems will show the new HPC Kaeser Mobilair M44. PHOTO: KAESER KOMPRESSOREN

Show now sold out

Exhibitor space at the Executive Hire Show is sold out. Visitors to confirm their attendance at the 18th annual edition includes Sany UK & Ireland, Doosan Bobcat, ABAX UK, Dantherm Group, ASKA International UK, Niftylift and Thwaites. According to the organisers, it will see 45 new exhibitors attend, including ENAR Group, XCMG, Makita and Magni Telescopic Handlers.

As well as revealing its patented lighting tower technology, Prolectric will reveal a prototype of the ProCharge ahead of its 2025 launch. Featuring a 12-panel solar array, the ProCharge is designed to power site compounds, electric telehandlers, small EV vans, ATVs, mini diggers, and dumpers.

Bobcat will showcase its expanded product range for the rental industry at the upcoming EHS. Visitors to Stand A72 will see one of the most extensive line-ups of compact machinery, material handling equipment, attachments, and portable power solutions—all supported by Bobcat's global dealer network.

Among the highlights are the latest PG40 and PG50 portable generators, which represent a leap forward in design and efficiency. Powered by Stage V D24 engines and Stamford alternators, these models deliver increased power output and reduced fuel consumption compared to their predecessors.

The PG50 offers a 50kVA prime unit, while the PG40 delivers 40kVA, both with compact designs and optional factory-mounted running gear for easy transportation.

The new generators also feature 'Liquid Heat,' a low-load management system that reduces downtime and extends engine life.

International attendees

As well as offering domestic companies the opportunity to showcase their latest innovations, a number of international companies will also be exhibiting through their UK partners.

For example, Spanish manufacturer of concrete vibrators, finishing tools, and compaction equipment ENAR Group is set to launch its new Spyder E BATT high-frequency poker.

The Spyder E BATT is a battery-powered high-frequency poker which the company said is designed for maximum runtime.

Power derives from a 58V Li-ion battery with fast charging for continuous operation. With a durable aluminium body, reinforced rubber protection, and ergonomic design, ENAR said it's built for versatility.

The company, which has a UK depot in Stafford, will also showcase its new range of single direction vibrating plates, including models with 350mm and 500mm width plates fitted with either Honda or Loncin engines.

Atlas Copco will unveil its ZBP 120-120 energy storage system. The modular, portable solution delivers 120kVA of power and123 kWh of energy storage, which makes it ideal for noise-sensitive zones and emissions-free applications.

Powered by lithium-ion batteries, the ZBP 120-120 supports standalone and hybrid operation, integrates with renewable energy inputs, and reduces generator runtime by up to 70%. With over 40,000 hours of working life and minimal maintenance, Atlas Copco said it's a cost-effective, sustainable choice for the hire industry.

Highlights on the SANY stand includes the SY26C mini excavator, a compact 2.7 tonne machine with reduced tail swing, easy towing capability, and a "next-generation operator's cab."

The fully electric SY19E, with zero emissions and a long-lasting LFP battery for faster, safer charging, will also be displayed. The SY35U zero tail swing excavator, equipped with a Stage V YANMAR engine, advanced load-sensing hydraulics, and safety-focused features, completes the OEMs mini excavator lineup.

Meanwhile, it will provide a European debut of its 2.7-tonne STR27 tandem roller. **IRN**

Point of Rental Software will discuss its Syrinx 365, which is now available as a cloud-hosted solution, on its stand. PHOTO: POINT OF RENTAL

The winners of the 2024 IAPAs celebrate.

Destination Dublin

Taking place in Dublin, 13 the 2025 IAPAs celebrate excellence and best practice.

Event details

2025 IPAF summit

iapa International Awards for Powered Access 2025

WHEN: 13 March, 2025
WHERE: Dublin, Ireland

iapa-summit.info

Celebrating excellence and best practice in the access industry, the IAPAs take place on the same day as the IPAF Summit, with its usual array of offering top level presentations and topical industry discussion, along with a wealth of networking opportunities across both events.

On 12 March, the day before the Summit and IAPAs, there are the usual site visit and IPAF & IAPA Welcome Reception in the evening.

Organised by *Access International* and IPAF, the IAPAs are offering 13 award categories for the 2024 event, covering new products and innovations to sustainability and safety, alongside equality and diversity in the workplace.

The event will also offer those in attendance top level presentations and topical industry discussion, as well as the previously mentioned outstanding networking opportunities across both the IAPAs and IPAF Summit for visitors.

IPAF Member only categories

IPAF Training Centre of the Year
- HSS Training
- Industry Training Services
- Mills

IPAF Training Instructor of the Year
- Enda Geoghan - Lift Hire Ireland
- Gonçalo Pereira - Transgrua
- John McNeilly - HSS Training
- Shaikha Mahfoudh - Dayim Equipment Rental

PHOTO: ADOBE STOCK/ DOROTA

Meet the shortlist

Four expert judges met in January to decide on the final shortlist for the IAPAs.

The judges are: David Meeke (IPAF), Kirsty Archbold-Laming (Southern Hoist), Karel Huijser (JLG) and Paola Palazzani (Palazzani) .

The categories and shortlists are as follows:

Access Rental Company of the Year
- GTAccess
- KDM Hire
- Mills
- Sunbelt Rentals UK

Contribution to Safe Working at Height
- Electroelsa - Integrated Bolts Presence Detector
- Nationwide Platforms - Hinkley Point C
- Niftylift - Safety technologies
- Rapid Access - Stop Work Authority (SWA)
- Sunbelt Rentals - Safety initiatives

The Sustainability Award
- Aver Asia - 3 pronged approach
- Dingli - Sustainable development strategy
- Mills - B Corp certification
- Tecnogera - Battery reuse

Digital Development Award
- AFI Rentals - Resource planner
- Capja – CapjaDocs
- PartnerLift – MIRA
- Sunbelt Rentals – Apps
- Equality, Diversity & Inclusion (EDI)
- Ammec Comercial
- Dayim Equipment Rental
- Mills

IAPA Innovative Technology Prize
- Modern Access & Scaffolding - sMart Xensor
- Niftylift - ClipOn
- Ruthmann - T 1000 HF
- Tecnogera - Batmov
- Zoomlion - ZT51JEH

Product of the Year - Mast climbers/Hoists
- Electroelsa - PM-M56
- Geda - ZZP F
- Maber Hoist - MBC50

Product of the Year – Scissor Lifts & Vertical Masts
- Easy Lift - EASYBB001
- Haulotte - HS18 E MAX
- MEC - 3232SE
- Skyjack - SJ3219 Micro

Product of the Year – Self Propelled Booms & Atrium Lifts
- Dingli - BA44ERT
- Haulotte - HA16 E (and E PRO)
- Leguan Lifts - Leguan 265
- Niftylift - HR22 SE (All-Electric Stick-boom)
- Skyjack - SJ60 AJE +

Product of the Year – Vehicle/trailer mounted
- Aldercote - Jack-less Transit Conversion
- Dinolift - Dino 120TLB
- Ruthmann - T 380 XS
- Ruthmann - T 1000 HF
- Sinoboom - GKS32EL

IPAF/Access International Lifetime Achievement Award

Winner to be announced at the ceremony

The winners will be chosen by an independent judging panel of five longstanding industry experts. IRN

Keeping rental safe

While projects to improve health and safety in the equipment rental industry differ depending on location, companies are increasing their efforts. Jeff Pao **reports.**

Construction equipment rental companies in Europe and North America are making different efforts to improve health and safety.

These efforts include a project led by the European Rental Association (ERA) to gather data on accidents in the European rental industry, identify critical types of accidents and the most frequently injured body parts, and establish an industry-wide benchmark to improve health and safety.

For this project, the ERA received accident data from seven rental companies and two rental associations under confidential agreements. Before publishing a full report in early 2025, it shared some preliminary findings with *IRN*.

Among the key findings was that in 2022, the seven surveyed rental companies reported 531 accidents, which resulted in 4,068 lost working days.

This translates into an average of six lost working days per accident. The consolidated loss time injury, which refers to the number of lost time injuries occurring in the workplace per one million hours worked, is 14.4.

Tomas Babicky, senior association manager at Kellen Company, which manages the ERA, tells *IRN*, "This is the first benchmark that we were able to come up with. It's a pilot because only seven companies have participated in developing this benchmark.

"In order to be more representative, we would need a much broader sample, but as a pilot, this is a good indicator.

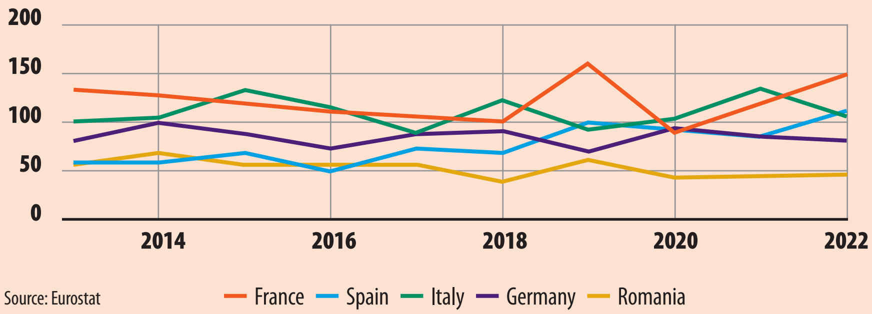
"We want to develop this into a rolling benchmark to track the trend," he adds. "As the industry is becoming more professional and mature, we would expect the number of accidents to decrease, hopefully."

Babicky explains that most accidents involved technical staff in delivery, mechanics, traffic management, or warehouse operations. He says more than half of the reported accidents were in the centre body sections, including arm, hand and torso.

The gathered data also showed that hand tool vibration is the most common injury in the rental sector.

He adds that equipment manufacturers, rental companies, and construction firms have a shared responsibility in this area and should collaborate to improve the design, provide safety guidelines and ensure that they are strictly implemented.

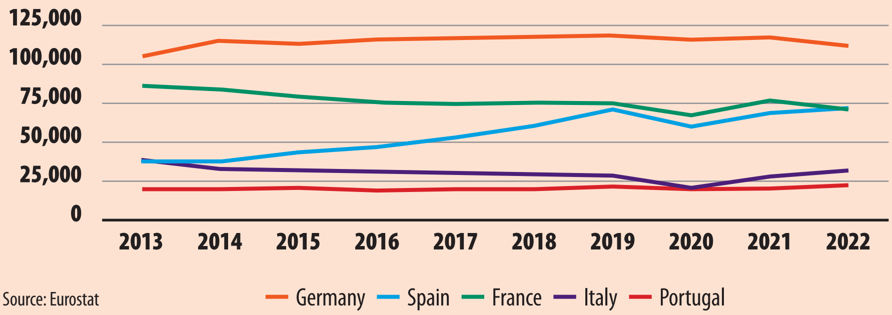
The number of fatal accidents in the construction industry in the EU



Source: Eurostat

Renta Group is taking remedial actions to strive toward its zero-accident goal.

The number of non-fatal accidents in the construction industry in the EU



Source: Eurostat

An image generated via Ideogram 2.0 depicts site health and safety.

Industry collaborations

Meanwhile, Léna Guyon, policy officer social affairs at the European Construction Industry Federation (FIEC), says the most common accidents in the construction industry are exposure to hazardous substances, work-related musculoskeletal disorders (MSDs), working with machines and falls from heights.

"Health and safety in the construction sector is the responsibility of all actors involved, from the workers to the employers, as well as the equipment makers," she says.

"What is essential is to develop a regular dialogue, in particular between construction companies and machines/equipment manufacturers, to continuously improve the safety features according to the actual needs and constraints on a work site, and also to integrate and make better use of new technologies, such as artificial intelligence (AI)."

Guyon adds that it can be challenging for some companies, particularly SMEs to apply the European legislations that set up occupational exposure limits for some substances and to access new techniques or technologies. She says companies need support, guidance and financial support to ensure their employees' health and safety.

In recent years, FIEC, together with the European Federation of Building and Woodworkers, has conducted many European Union-funded projects related to health and safety at work, including the launches of a guide to help companies deal with situations on a work site that may have asbestos and a guide with good practices for respirable crystalline silica.

In 2022, FIEC, EFBWW, and the European Sectoral Social Partner for the construction industry issued a joint declaration on reducing work-related accidents/diseases under the EU strategic framework on health and safety at work 2021-2027. FIEC launched a guide on how firms can adopt an occupational safety and health management system.

More targeted solutions

The US Bureau of Labour Statistics said workers in transportation and material moving saw 1,620 fatal work injuries in 2022, making it the group with the most fatalities.

Workers in construction and extraction occupations had the second most fatalities, with 1,056 cases in 2022. Falls, slips or trips accounted for about 40% of these fatalities. The fatality rate increased from 12.3 deaths per 100,000 workers in 2021 to 13 in 2022.

In the EU, the number of fatal accidents in the construction industry rose from 741 in 2021 to 754 in 2022, according to Eurostat data. The fatality rate for this sector was about 6.3 deaths per 100,000 workers.

The number of non-fatal accidents in the construction industry in the EU fell from 369,145 cases in 2021 to 363,731 cases in 2022.

However, Babicky says the number of accidents in the entire construction sector may not reflect the situation in the rental sector, which mainly involves minor accidents that lead to a couple of lost working days.

He says higher transparency about accidents in the rental sector would help industry players formulate more targeted solutions and improve the industry's overall image to attract young talents.

However, not all companies would voluntarily disclose their accident figures. One that does is Renta Group.

In its sustainability report, the company reported 15 accidents in 2023, compared with 23 cases a year ago. It said lost time injury frequency rate (LTIFR) dropped to 4.65 from 9.64, but the number of sick leave days caused by accidents increased to 220 from 206.

The company says that although accidents such as falls, cuts, and crush injuries may occur despite its preventative efforts, it remains committed to investigating the causes of these accidents and taking remedial actions to strive toward its zero-accident goal.

United Rentals, which also makes its accident figures public, said its total recordable incident rate (TRIR), which measures the number of work-related injuries and illnesses per 100 full-time employees over a year, was 0.75 in 2023, compared with 0.76 in 2022.

"We utilise a mixture of indicators to assess the safety performance of our operations, including TRIR, preventable motor vehicle incidents per million miles, corrective actions and near miss frequency and have disclosed a goal to reduce our TRIR further," said the company. "We also recognise outstanding safety behaviours through our annual awards program." In 2022, it set a goal to reduce its TRIR to 0.40 by 2030.

Mental health

According to the European Agency for Safety and Health at Work, the construction industry has relatively few procedures and measures to deal with psychosocial risks because attention has focused elsewhere on important risk factors, such as falls from heights. The ERA has tried to collect data on health issues among rental firms' employees, but it has found that data collection is not feasible at the current stage.

"Compared to safety issues, it is much more difficult to gather concrete data for health issues, which are long-term," Babicky says. "More crucially, health issues are more sensitive regarding what the companies can report because of privacy concerns."

He says the ERA will continue to raise awareness of health issues in the industry and encourage rental companies to discuss them more. He adds that people can only address the problems that they know about.

FIEC said in a 2019 report that construction workers' mental health could deteriorate due to long working hours or a worsening job market.

In 2020, United Rentals launched a Live Well, Safe & Healthy program to encourage healthy behaviours and to raise morale, productivity and overall employee engagement. The program includes a biometric screening at work or off-site, a health assessment, a paid day off to be used for a wellness exam or day of service, tobacco cessation support, and participation incentives. About 63% of employees participated in the program in 2023. **IRN**

Tower trends

With demand for towers high, units in the solar and hybrid range are growing in popularity.

"Most importantly, rental companies are in search of high quality and well-built light towers that will operate in their inventory as long as possible to drive the maximum ROI," says Nicholas Palumbo, general manager of lighting specialist Volterrex.

Palumbo was responding to the question as to what rental companies are prioritising when investing in new equipment.

And, while the core factors remain, there are new factors driving demand.

In the case of Volterrex, it is seeing a move away from traditional metal halide lamps to advanced LED technology, as Palumbo tells *IRN*, "LED light towers operate more efficiently, and can turn out more powerful illumination than traditional alternatives.

"With dimmable lamps and long-endurance battery packs, these modern designs can also eschew the need for diesel-thirsty external generators. With the higher illumination output, we are also able to add diffusion elements to the light towers so the light cast is better suited to safe and productive work conditions."

Axel Andersen, sales and marketing director of Xummit, further elaborates, telling *IRN* that the company is focusing on three main areas: light control, safety, and mobility.

In the case of light control, he says light control can reduce light pollution, minimise energy consumption and disturbance of surroundings.

He says, "Using advanced light control dims down the light towers after work hours, reducing the light pollution and energy consumption with 90% while still having enough light on the work site to reduce accidents.

"The software PLEJD, developed in Sweden, combines this with an astro timer and creates a Bluetooth MESH network so that all light towers together with crane lighting, and site lighting can be controlled together as one group."

He adds that the industry needs to increase the safety of light towers on the market, with the majority of towers not offering protection for the worker should one of the steel wires fail.

Hoping for hybrid

Trime has been using hybrid technology in the lighting space for a while, and its technical director Wayne Brennan says this year will see a push towards the technology.

He says, "I believe this year we will see an even bigger push towards Hybrid and Hybrid-Solar lighting towers with traditional combustion engine/BESS designs and also the emergence of systems utilising the newer fuel cell technology (Methanol & Hydrogen) which may eventually be replacing the more traditional combustion engine powered units.

"Trime also believe that we will see more acceptance of purely solar lighting towers systems."

Another factor, he adds, is demand for equipment to be fitted with telemetry that allows real time monitoring and control of towers. In that respect, it offers the Trime telemetry system, which allows for control of units over the internet and the creation of groups of towers to allow single command control of larger groups.

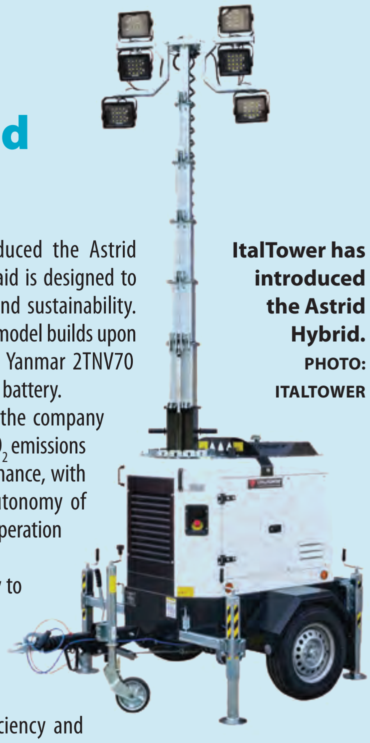
Meanwhile, solar specialist Prolectric is one OEM looking to meet sustainability demands having created the first temporary solar lighting tower in the UK in 2016.

And, although she admits that solar adoption rate is low and diesel remains the status quo, Kathryn Adams, commercial director, Prolectric, tells *IRN* that companies will soon be required to embrace the technology.

She says, "Either way, rental companies will be required to up their confidence and investment level in the proven alternatives to support the contractors' transition away from diesel onsite and realise all of the benefits that solar powered alternatives can provide.

The HiLight MS 4 solar tower. PHOTO: ATLAS COPCO

ItalTower launches Astrid Hybrid tower



ItalTower has introduced the Astrid Hybrid. PHOTO: ITALTOWER

Italy-based ItalTower has introduced the Astrid Hybrid, a lighting tower that it said is designed to offer a balance of performance and sustainability. The company stated that the new model builds upon the Astrid series, incorporating a Yanmar 2TNV70 diesel engine and a 200 Ah lithium battery.

With a focus on sustainability, the company said Astrid Hybrid aims to reduce CO_2 emissions while maintaining reliable performance, with the unit offering a maximum autonomy of 1,000 hours, providing extended operation periods.

Another key feature is the ability to run continuously, the company said, which reduces the need for maintenance and refuelling. Meanwhile, its hybrid system is said to enhance operational efficiency and make it a suitable option for rental companies looking to reduce downtime and optimize resource management.

Additionally, the Astrid Hybrid is equipped with a customized Comap AMF25 system, enabling remote management via the Comap WebSupervisor. This allows rental companies to monitor and control units remotely, providing fleet management capabilities and further streamlining operations. The unit is to be officially launched at Bauma, but the company said it would be taking orders before the show.

Terese White, product manager, Multiquip, says the industry is being driven by demand for eco-friendly lighting products.

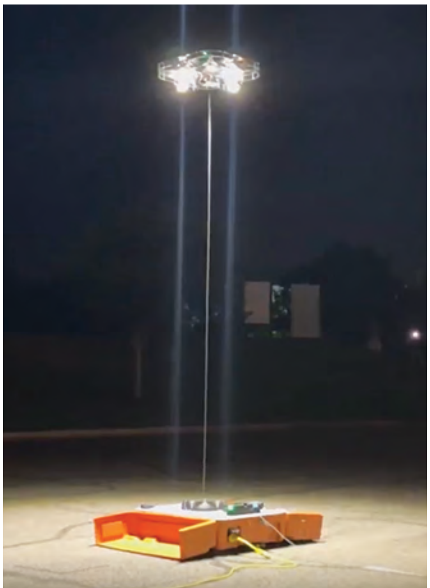
"With the game-changing efficiency level of solar technology that is now widely available, diesel tower lights should not have a presence on UK construction sites. We need to work very hard to break this cycle."

To help the industry switch from diesel tower lights to solar-powered or hybrid tower lights, Adams says the company has produced a guide to help customers choose the best solutions for their specific projects.

Elsewhere, Atlas Copco has said it has made a "leap forward" in efficient and reliable lighting solutions with the launch of its second generation of solar light towers.

Equipped with SMD High Lumen LED technology, the Hilight-MS 4 delivers 87,750 lumens and covers up to 3,846m^2 at 20 lux, while the Hilight-MS 5 provides 117,000 lumens and illuminates 5,278m^2.

Each unit features solar panels in parallel, which Atlas Copco said ensures reliable battery recharging even if one panel malfunctions, and includes a Maximum Power Point Tracking (MPPT) system for efficiency.



The ALED light, a person-portable light powered by actively tethered drone technology.

The models are powered by a 5kWh lithium battery, offering up to 85 hours of autonomy with dimming and ECO modes. Solar panels can recharge the battery in 2 hours and 36 minutes under full sunlight, while a HardHat® canopy protects the units.

Lithium batteries and solar panels deliver a minimum of 11 hours of autonomy, with recharging times as low as four hours for the MS 4 (with one battery) and five hours for the MS 5.

Eric Tomin, divisional product marketing manager, Light Towers and Portable Generators, Atlas Copco, says, "Our latest models, the HiLight BI+ 4 and HiLight MS 4, are designed to cater to the growing demand for sustainable and energy-efficient solutions. These models incorporate hybrid and solar technologies to reduce reliance on traditional fuel sources.

"Combining the use of lithium-ion batteries with a low-consumption Stage V diesel engine, the new HiLight BI+ 4 light tower offers users maximum flexibility as it has four operating modes: it can be powered directly from mains electricity, from its lithium-ion batteries, from its diesel engine, or from a hybrid setting to make the most of the energy available."

Long run times

Terese White, product manager, Multiquip, adds that long run times, ample light output, and energy efficiency, low maintenance, long life cycle and reliability are also key factors.

Reflecting this demand, one of Multiquip's newest lighting models is the battery powered 4-spot and balloon light carts. The battery powered light carts, the GBBAT3S4M and GBBAT8BM, are 100% emissions free, re-chargeable units with built-in chargers and offer an ultra-quiet operation, White says, making them "highly environmentally friendly – not only having a zero carbon footprint but zero noise pollution as well."

She says, "Multiquip's battery powered light carts produce zero emissions so it is in the forefront of the movement in reducing environmental impact."

Safety is also a priority for investors, according to manufacturer Blue Vigil. Carl Miller, chief operating officer, says, "Poor lighting is a major contributing factor to safety incidents, productivity loss and quality issues on nighttime sites. The latest trend is to modernise the very design of the light tower itself to remedy these issues. Now, light towers are taking to the skies to provide superior light coverage by hovering above the worksite."

Blue Vigil is the developer of the Autonomous Aerial LED light, powered by an actively tethered drone.

The 100lb ALED positions a high intensity LED array between 40ft - 100ft above a job site for as long as needed.

Its 140K lumen LED array produces a useable light field over 8,000sqft on the ground which it says provides nearly twice the usable light coverage. By illuminating a zone from above, light shines down onto the area of operation offering less light spillage and eliminates the hazardous glare and shadow.

Miller concludes, "Since the 1990s, the light tower category has seen little innovation; it's fundamentally a very mature technology. The focus has been on adding solar and battery power options versus improving light quality." **IRN**

Rental ready solutions

Essential to construction, rental and industry, generators and compressors are evolving with greener, smarter technology.

While not strictly linked, generators and compressors both serve as critical equipment in a number of sectors, in particular in the fields of construction, rental, and industrial.

Their versatility and reliability make them indispensable for applications ranging from powering remote construction sites to supporting processes. In the rental sector, their importance is magnified, as businesses rely on them to provide flexible, on-demand solutions without the long-term investment of ownership.

Of course, with many rental companies feeling the pressure to invest in more sustainable fleets, the shift towards greener technologies is becoming increasingly important for fleet owners.

Meeting emissions

According to Stephen Saal, vice president of sales and marketing at Aggreko, one of its newest additions to its product range is designed to meet demand for equipment that meets emissions regulations, which are becoming more stringent around the world.

In the case of Aggreko in North America, the company has expanded its range of battery energy storage systems (BESS) available for rent, adding 250kW/575kWh and 500kW/250kWh units to its existing 30kVA, 60kVA and 1MW models.

The mid-sized units can be plugged into an existing power system, operated in island mode, or used in a hybrid power solution, providing energy storage for commercial and industrial applications. The BESS models are containerised, so they are delivered with inverters, HVAC, fire protection, and auxiliary components.

Saal said as well as meeting emissions targets, the two new sizes would help customers improve efficiencies and reduce costs; "We're committed to using our decades of engineering expertise to deliver greener solutions to power our customers' energy transition, along their own paths and pace."

In addition to the expanded BESS options, Aggreko's 'Greener Upgrades' range in North America includes Tier 4F generators, natural gas generators and oil-free air compressors.

Meanwhile, Generac Power Systems is one of a number of OEMs that has committed to developing efficient and sustainable energy solutions for use on sites.

Aggreko's new 250 kW/575 kWh battery energy storage system. PHOTO: AGGREKO

While it has launched a plethora of new products in recent years, in 2024 it acquired PowerPlay Battery Energy Storage Systems, a division of SunGrid Solutions Inc., an engineering, procurement and construction company for energy storage.

The company said the deal would enable it to support its customers in their energy objectives and sustainability goals.

PowerPlay specialises in providing turnkey lithium-ion battery-based battery energy storage system (BESS) solutions tailored for commercial and industrial (C&I) projects up to 7MWh, the announcement said.

Systems up to 7MWh are commonly deployed in commercial and industrial (C&I) enterprises, including retail stores, restaurants, office buildings, manufacturing facilities and healthcare facilities.

Aaron Jagdfeld, president and CEO of Generac, said the acquisition will support Generac's commitment to offer "a more complete ecosystem of products and solutions to domestic commercial & industrial customers" that empower them to reach their energy objectives "with a strong emphasis on resilience, efficiency and sustainability."

Eco-friendly options

While most people think of compressors, sustainability isn't the first thing that comes to mind. But innovation in the sector is changing that.

Take for example the MDVN52 Eco5 from Rotair, a lightweight compressor launched at the end of 2024.

Described by Rotair as a lightweight, high-performance compressor designed to meet increasing market demands for efficiency and versatility, the unit is powered by a 42kW Hatz Stage V diesel engine and offers 5200lpm at 7bar and up to 3100lpm at 14bar.

The unit features a pneumatic control system that

The Mobilair M44 compressor.
PHOTO: KAESER

US-based BESS supplier goes bankrupt

US-based Battery Energy Storage System (BESS) start-up Moxion Power has gone bankrupt, according to reports.

Founded in 2020, the company aimed to replace diesel generators with zero-emission electric batteries and counted Sunbelt as one of its customers.

The company haven't spoken publicly about the bankruptcy, which was first reported in August 2024, however, an email from CEO Paul Huelskamp to employees seen by SFGate said the company had "not found a path that will allow us to continue operations as Moxion Power Co., and effective today, we will be closing our doors."

The email was sent some weeks after the company furloughed some of its staff and months after some were let go in a cost-cutting move.

According to SFGate, Huelskamp said in the email that the leadership team would be handing the company over to a third party for the sale of Moxion's assets.

The news will have come as a surprise to many. Just two years ago the company completed a $100 million Series B led by Tamarack Global with participation from Series A lead investor Energy Impact Partners.

Other investors included Sunbelt Rentals, Amazon's Climate Pledge Fund, Microsoft's Climate Innovation Fund, Enterprise Holdings Ventures, Marubeni Ventures, Suffolk Technologies and Rocketship.vc.

PHOTO: MOXION POWER

Rotairs's MDVN52 Eco5 compressor is powered by a 42kW Hatz Stage V diesel engine.

PHOTO: ROTAIR

automatically adjusts engine revs based on air delivery requirements, which Rotair said helps operators save fuel while maintaining consistent performance.

At the same time, the MDVN52 Eco5 is built to operate in extreme conditions and can withstand temperatures from -10°C to +55°C, delivering compressed air temperatures ranging from ambient +8°C (with an optional aftercooler) to ambient +40°C as standard.

The MDVN52 Eco5 also features electro-galvanized bodywork and an advanced painting process to ensure long-term protection, Rotair said. Other features include an oversized air filter for effective air intake filtration, a combined radiator for efficient cooling, and an intelligent start/stop system that prevents incorrect operation.

In terms of transportation, the MDVN52 Eco5 is lightweight and compact enough to be towed under a standard B license, making it accessible to a broader range of operators and boosting utilization rates, a key metric for rental companies.

Optional features include a line lubricator for automatic lubrication of air-operated tools, reducing rust and extending tool lifespan and a clogging sensor for the engine air filter to maintain efficiency and ensure correct air supply.

Sustainable discussions

On the topic of Stage V compliant models, Kaeser Kompressoren launched the Mobilair M44 last year and said that it "bridges a market gap by offering portable compressed air systems that combine high performance with a compact, eco-friendly design."

Delivering an output of 4.1m^3/min at an operating pressure of 7 bar, the Mobilair M44 sits between Kaeser's existing 3m^3 and 5m^3 units and is described by the company as a "powerful, compact, and environmentally friendly solution" for the European market.

The unit is powered by a Kubota diesel engine with a diesel particulate filter and comes with optimised power management and a low maximum engine speed of 2500rpm that Kaeser said delivers "outstanding fuel efficiency and minimal emissions."

The machine also features the new Sigma Control Smart controller to make operation of it easier. With this, maximum pressure can be adjusted precisely in 0.1-bar increments between 6 and 7.5 bar at the touch of a button.

The compressor controller is said to ensure optimised compressed air availability, fuel efficiency and exhaust gas management.

Meanwhile, a 45litre tank capacity can provide enough capacity to work for a full shift.

Additionally, it comes with a spin-on cartridge for simple and efficient oil separation, while its lightweight design (weighing 750kg) is said to make it ideal to be towed on the road without a braked trailer and ensures easy transportation with a B-driving licence.

Other standard features include an operating mode indicator, monitoring and system diagnostics and anti-frost control as standard, which makes it an ideal solution for operation of pneumatic hammers and impact moles.

Compressed air reheating and filters for technically oil-free compressed air are also available as optional features, which come equipped with a braked chassis. A choice of different chassis options - unbraked or with an overrun brake - as well as stationary versions with skids or machine feet, are also available.

It's not the first time the company has promoted the use of eco-friendly solutions. At Intermat 2024 it showcased a battery powered portable compressor with the aim of promoting discussion on electrification.

In August the company also launched the M10E portable compressor. **IRN**

Speaking to *IRN* at the Bauma China show in Shanghai, Stuart Dean **pays tribute to outgoing CEO** Bill Whitehouse **and explains the priorities for the Kennards Hire business.**

Scan the QR code for the full interview.

Meet Stuart Dean, the next CEO of Kennards Hire

There are changes afoot at Kennards Hire in Australia, where CEO Bill Whitehouse – the 35-year veteran of the business – stands down in April, to be replaced by current COO, Stuart Dean. Whitehouse will take a break and then return to the board in August as non-executive director.

Dean joined Kennards as group IT program manager in 2009 and in 2016 was promoted to general manager of IT. In 2017 he became general manager for Queensland and in 2019 was appointed COO, based at Kennards' head office in Sydney.

The incoming CEO will be taking on a different, larger Kennards Hire, the business in the last five years having targeted more work with major contractors, widening its customer base beyond the homeowner and local contractors that has been its traditional focus.

Let's address the leadership changes at Kennards, it's a natural process as experienced people reach their retirement, but also presents opportunities?

Stuart Dean: I think it's a really exciting period in our business and what you said is 100% true. There's real nostalgia associated with it and pride in the legacy that a lot of these guys who are moving into the next phase of their life are going to leave behind.

And for those of us who have the mantle to take forward, there's a lot of things that are coming together at the right time to support the next phase of growth for Kennards. And that's tremendously exciting at the same time. So, I think the most important thing that I take responsibility for and treat with delicate hands, is that we don't change who we are.

The history of Kennards Hire over 75 years, the DNA of who we are, is built into our culture and comes from the Kennard family through the board, through the leadership team. [Being family owned] is part of the competitive advantage that we have.

Your own background is firmly in Australia's equipment rental industry?

I've had 15 years with Kennards, actually this month [November 2024]. I was with Coates for two years during the merger of Coates Hire and National Hire [in 2007]. And I was with National Hire prior to that. So, five years with National Hire, two with Coates, and 15 with Kennards.

Current CEO Bill Whitehouse steps down as CEO in April, but will be a non executive director from August this year.

How do you assess bill Whitehouse's contribution to the business?

Nothing short of remarkable. He's been my boss for the past eight years and he has been a real legend of the rental industry in Australia and New Zealand and internationally, with connections all over the globe.

He has stewarded our business through some of the most challenging times, particularly through Covid. We've seen growth under his tenure as CEO of around 60% to 70% on revenue, over the last five years.

And I think his superpower is that he builds teams and gets the best from those people because he's at the heart of it. He's a quality bloke and so he will be missed.

I'm so glad he's going to come onto the board. But not only that, he's a good mate of mine as well. So I hope he has a fantastic retirement, when it comes.

PHOTOS: KENNARDS HIRE

You talk about the identity and the culture of Kennards not changing, but at the same time, there are opportunities to further develop the business. What is the plan?

So, the changes are not in strategic direction; that's a strategy that is rock solid and has been worked on and refined over the last three years. We set a three-year plan, and we set our annual plans in behind that.

I think the excitement comes from executing on those plans. Our history has always been in trade and DIY, and we take great pride in that business we have in Australia, although half our business now comes from the commercial market, half of it. And that really has only happened in the last five years.

Five years ago it would be have been 10, 20%? It's an enormous shift.

And a deliberate shift. That's where the growth opportunity for us is. We understand the volume that market can generate and the potential.

Prior to the expansion it would've been about 30% DIY, 50-60% small trade contractors, man-in-the-van type customer. So 10% to 20% on the larger construction type segment. It's not that we've lost market share in the other two – that's really continued to grow year-on-year at a consistent rate – the real uplift has been in commercial.

How have you done it?

It's been a multi-pronged approach. We articulated the vision early on, we set the strategy in place behind it, and then we set about it really from a customer engagement point of view. So, building deep meaningful relationships, first and foremost, understanding what their needs were, and then building the capability and the capacity behind it. I guess in the last five years, we've expanded our sales teams.

And operationally, we've invested significantly. We now have five distribution centers across Australia. Those five centers are doing circa A$100 million in revenue, to give you a number.

You're moving up in size with excavators and things like that?

Yes, we have in some categories. Particularly in power generation, pumps and fluid management, we're carrying some significant bits of kit, and likewise in aerial work platforms. So, we are not averse to that space, perhaps like we were in the past.

I suppose it's important to reassure your traditional customers?

Without doubt. The overriding sentiment and the strategic plan for the organization is that that's our core customer. We treasure them, we value everything that they bring to our business, and we won't lose that as we go forward.

PHOTO: KENNARDS HIRE

A Snorkel S2755RT scissor in the Kennards Hire access fleet.

"We now have five distribution centers across Australia. Those five centers are doing circa A$100 million in revenue, to give you a number."

An 8 tonne Kubota KX080-3 excavator in the Kennards Hire fleet.

Stuart Dean, Kennards Hire COO, pictured at the 2024 Bauma China exhibition.
PHOTO: *IRN*

You've become quite kind of famous for the number of specialist divisions you have – you're an early adopter of that strategy. How important is that? Is it continuing to grow, is it important to the commercial segment, and are there opportunities for new divisions?

Yes, all of the above. It's a very nice part of the business because of the ability to segregate yourself from the competition and really find a niche market that's going to work, but also complements everything else we're doing. And particularly in relation to the commercial market sector.

So the answer is yes, they are continuing to grow and we are continuing to invest in this space strategically. We look at that as a core pillar of growth for us, in the short, medium and long time.

Any particular products that you see an opportunity for coming up?

We're well entrenched in water management, power generation, traffic, site services. Portable buildings has been a really big investment for us over the last two to three years, particularly. We've gone from almost having none in our fleet to having over 1500 in that two-year period. And we're looking at strategic opportunities as they occur, and from an acquisition point of view or a further investment.

And then we're looking at adjacents. We carry a vast range of industrial vehicles and we've got opportunity in that space, and ground support systems, things like shoring. We've started that investment in a small way, and we'll look at how that unfolds over the near horizon.

In Australia, there's always this division between infrastructure and mining, oil and gas. Have you got a big exposure to the oil and gas and mining sector?

That's been part of the commercial expansion. We made an acquisition in Western Australia and another one in Northern Territory over the last 10 years. >

Kennards Hire's fleet includes this Makinex hybrid power system, the HPS45, with a 45kVA genet, 60kWh battery, and 8kWp solar panels.

They continue to be very good for us. We've got great leadership in that space, and really strong prosperous businesses. Slightly different perhaps to what Coates are doing up in that part of the world, but I think we are doing our thing really well.

In Europe you see all the rental companies wrestling with the energy transition. It depends on so many things, the regulations behind it, the customers. What's the situation in Australia and what's Kennards' approach to investment in that kind of equipment?

It's coming from a number of perspectives. It's not as regulated as in Europe – not yet – but we know it's coming. So, we have that to contend with and understand the timing around what is a real need and a drive from our customer base.

That's something we embrace wholeheartedly. We've embarked on a thorough ESG strategy in terms of us as an organisation, but also in terms of products and what we're willing to engage in, either trial or test or put into the core fleet and really maximize the value of the return from that investment…We're making great progress - we don't want to be bleeding at the front of it, but we certainly want to be leading that change and that transition.

Which product categories are you being most progressive with that. Is it power and aerial platforms and lighting towers?

It's right across the range. The investment is going into power generation – that's where we're really putting a lot of time and focus. But that's not to say we're not looking at right across the range of what we carry.

And you are looking at product this week at Bauma China

We certainly see the rise of the industrial might of China, but what we're seeing here is on a scale, at a level that we probably weren't quite prepared for. It's opened our eyes just to what's coming. For us, being aware of it, understanding the level that it's at and being proactive in terms of what that means is really important. That's why we're here.

It's a tidal wave that no one's stopping. Obviously, the back-up and the support for us in Australia, that's a different ball game and is equally important. I think there's a little bit of work for the Chinese OEMs to do in that space, but certainly they've made some serious headway, particularly in certain categories.

It's early days for us. We bought an access business in Darwin and they were carrying the LGMG product. So, we've got a product that's five or six years of age. And we've just put some Sinoboom into the fleet as well. As I said, it's very early days, and everything's great when it's new, as the saying goes.

What is your approach to digitalization and investment in technology? What are your priorities?

Technology is a core enabler of any business today. And for me, it always comes back to how does it add value to the customer? And there's a part of technology, which is the [basic] part that enables you to do business – and you need those things to be well and truly done. But what's going to separate us from our competition? And that's where our focus is at and that's what we're investing a lot of time in building capability.

So that's about obviously product innovation [in the fleet] for sure. It's transparency of product with IoT and then continue to develop and evolve our Easytrak platform. It's about becoming more efficient and increasing productivity internally so that we can provide a better service to our customers.

Any key projects or investments you're making at the moment?

There always is. About six years ago we wrote our first mobility platform, software application, to integrate our ERP effectively. So, we can enable transactions, our locations and also our customer sites. That's going through a significant rewrite and modernisation right now.

We're looking at the next stage of data insights and data intelligence. The reporting platforms that we use are I believe in fantastic shape. The next step in that is exciting for us. So that does receive an enormous amount of investment and resource contribution. And then there is the whole digital journey for our customers – the next evolution of our website, the end-to-end customer journey and how we make that seamless.

A Kennards Hire battery energy storage unit on site.

What will "the next step" in data allow you to do?

I think it will make far more intelligent decisions based on what we're seeing. I think AI is certainly coming in a big way, but again, it's about being pragmatic, really bringing it back to what's going to add value and what's real.

Take what's happening in power generation. A traditional generator paired with a battery system, with a solar array, on a smart enabled site compound which has been mobilised through technology that's being used to plan and design the layout and which has been worked on in partnership with our customer.

How does the industry evolves in this connected space, right? And it's not one thing, it's all of those things that are going to come together to provide the synergies and the customer experience in the future.

So there's a lot happening. How ambitious is Kennards in terms of market share or just absolute growth?

We've never been in growth for growth's sake - that's not who we are. For us, growth is important to any organisation because it provides opportunity for people, ensures there's a health to the company ongoing. But that growth for us is all about quality growth in meeting the needs of our customers. And that will play true over the next five years as it has over the past seventy-five.

And therefore, it's not about setting this aspiration that we're going to at all costs. It's about setting a robust, strongly held vision that's supported by all of the stakeholders of the organisation and then putting in the fundamentals of a really sound execution on that strategy.

So, I don't know where we'll be in five years, to give you the answer. I know that we have incredible people, that we have a healthy appetite, if that answers your question to a degree.

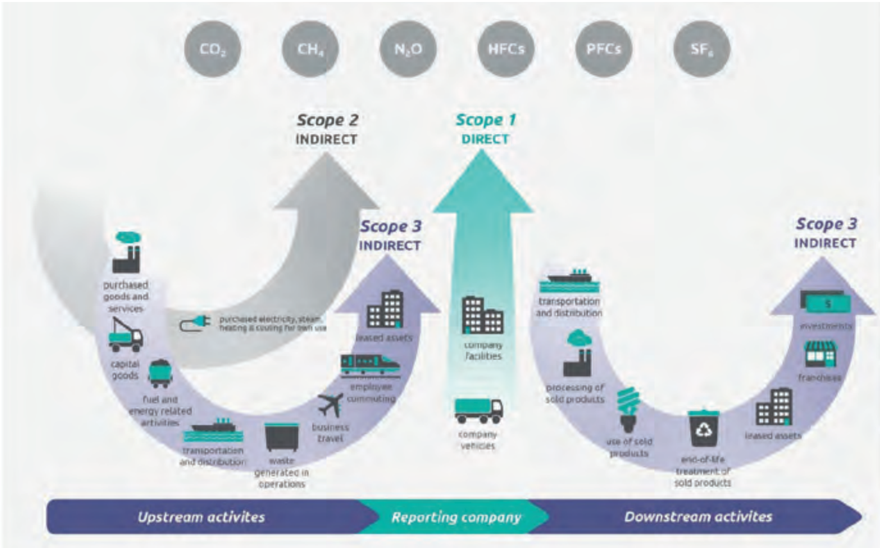
Because we want to see that for the health, not only our shareholders and stakeholders, but for the people who work in the business. And that's a profound responsibility that I have going forward. **IRN**

With equipment rental aligning with sustainable practices, ERA has implemented several significant sustainability projects.

ERA's sustainability journey

The equipment rental industry aligns with sustainable practices, offering companies an opportunity to reduce environmental impact. As an integral part of the circular economy, the rental model promotes efficient use, repairability, and resource conservation, contributing to global sustainability efforts.

In this context, ERA has implemented several significant sustainability projects in 2024, including the notable Carbon Reporting Guidance initiative.



Addressing carbon reporting

With the increasing impact of climate change and the strengthening of related regulations, including the CSRD application, rental companies face challenging carbon reporting requirements.

Stakeholders within the rental industry expect companies to assess their sustainability performance, set targets, and disclose progress. This growing demand underscores the need for a standardised methodology.

The Carbon Reporting Guidance addresses direct emissions (Scope 1), indirect emissions from purchased energy (Scope 2), and all relevant categories of Scope 3.

It emphasises the most significant emission sources for the rental industry, offering tailored calculation formulas to quantify emissions while allowing flexibility to adapt to varying data availability.

As a shared resource for the industry, the guidance accommodates companies at all levels of maturity.

It considers various reporting approaches, allowing flexibility based on desired precision and data availability. Conducting a carbon footprint assessment presents challenges that can be technical, managerial, or related to internal and external stakeholders.

Key features of the guidance

- **Goal-oriented:** Beyond meeting regulatory requirements, a carbon footprint analysis provides insight into emission sources and levels, helping identify reduction opportunities.
- **Collaborative:** The guidance is a result of cooperation between rental companies, equipment OEMs and will benefit not only the rental industry but the whole value chain including rental customers.
- **Comprehensive:** The guidance maps all relevant elements of company´s carbon footprint in accordance with internationally recognised GHG Protocol
- **Balanced between accuracy and simplicity:** To ensure feasibility, companies may prioritise significant emission sources while employing straightforward yet representative methods for others.

The guidance provides a step-by-step methodology for calculating corporate CO_2 emissions in Scopes 1, 2, and 3. Tailored to the rental industry's unique value chain, it aligns with the established Greenhouse Gas Protocol. This ensures that users follow recognised standards while gaining access to sector-specific insights.

The guidance offers actionable steps, detailed methodologies and specific formulas for GHG emission calculations for companies beginning their carbon reporting journey or seeking alignment with industry best practices.

By standardising methodologies and utilising the equipment database, the industry can collectively progress toward its sustainability objectives.

The Equipment Database: A foundational resource

Another cornerstone of ERA's sustainability efforts is the ERA rental equipment database. Accurate emission estimation depends on specific equipment data, which is often unavailable. The database addresses this issue by serving as a reliable reference, drawing on industry-specific data provided by rental companies, OEMs, and lifecycle assessment analyses.

This resource extends beyond carbon reporting, enabling rental companies to respond to client inquiries about project-specific emissions. By leveraging the database, companies ensure consistency across the industry, supporting their sustainability goals.

For more information about the Carbon Reporting Guidance, visit: https://erarental.org/publications/era-carbon-reporting-guidance/ **IRN**

EUROPEAN RENTAL ASSOCIATION

CONTACT ERA:
European Rental Association (ERA)
Avenue de Tervueren 188A, box4
1150 Brussels
Belgium
+ 32 2 761 1604
www.erarental.org
E-mail:
Secretariat-Administration:
era@erarental.org
Secretary General:
secretariatgeneral@erarental.org

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