

rental

A KHL Group Publication

Volume 19 | Issue 4 | June 2019



Ranking the world's
top 100 rental companies **p34**

A large orange Hitachi ZW220 wheel loader is shown in a construction setting, dumping material from its bucket into the bed of a blue dump truck. The loader has 'Z220' and 'HITACHI' visible on its side. The background is a clear blue sky.

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Lasting effect

There has been an influx of new entrants from North America in this year's IRN100 listing of the world's top 100 rental companies (page 34). This is perhaps unsurprising given the region's bullish rental market; good prospects are encouraging investment in North American rental businesses.

Of course, the big question hanging over the market is, how long can this level of growth be sustained? A downturn is inevitable, but it's been argued that North American rental companies have been morphing into more resilient forms through acquisitions and diversification of their rental offering. Turn to the ERA Convention report on page 51 to get some insights from Cr dit Agricole CIB.

More broadly, there is also the question of how long we can sustain the current patterns of production and consumption to which we have become so accustomed as a society, and it is argued that we need to make the transition from a linear to a circular economy. This topic was the focus of the ERA Convention held in Madrid, Spain, in May, at which some eye-opening presentations were given. Again, our report on the event, as well as the ERA page (page 71), give an overview of what was discussed.

Sustainability is something of a theme in this month's issue, with Kevin Appleton offering his insights on page 13, and two features that relate directly to the topic: one looking at the trend towards electrification in the access sector (page 47), and the other exploring what happens to old equipment when rental companies renew their fleets (page 59). Electrification is also a growing trend in the market for compact loaders (page 27).

North American companies are not the only ones undergoing a transformation; Cramo is seeing its role evolve as it adapts to a changing rental market. In an interview with *IRN* (page 21), the Finnish company's CEO, Leif Gustafsson, said that Cramo is becoming a fully-fledged service provider; "Our business will be transformed".

Rental depots will also be transformed in the future. On page 67, Clotilde Jouette from Avesco Rent and Omar Achment, founder of Overstory.eco, imagine what the rental depot of the future might look like, outlining the parameters defining the shape depots will take.

Before leaving you to peruse the magazine, I would like to take this opportunity to personally congratulate the winners – and runners-up – of this year's European Rental Awards (page 53). Well done to you all!

Thomas Allen

Editor

International Rental News

**KHL's rental portfolio**

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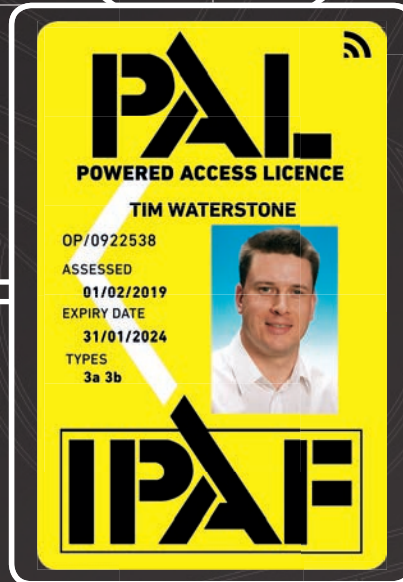


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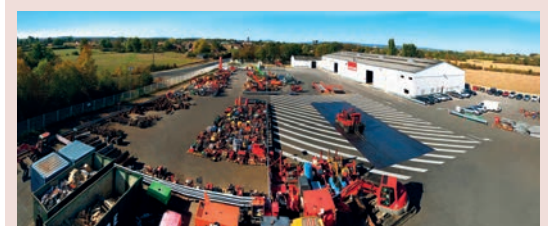
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...outside

Find out which rental companies made it into the 2018 top 100 league table. See page 34



DIARY DATES

2019

DIESEL PROGRESS SUMMIT

September 30, 2019
Louisville, USA

ICUEE

October 1-3, 2019
Louisville, USA

CONEXPO LATIN AMERICA

October 2-5, 2019
Santiago, Chile

INTERNATIONAL RENTAL CONFERENCE (IRC)

October 22, 2019
Shanghai, China

APEX ASIA

October 23-26, 2019
Shanghai, China

CEMAT ASIA

October 23-26 Oct, 2019
Shanghai, China

2020

CONEXPO-CON/AGG

March 10-14, 2020
Las Vegas, USA

INTERNATIONAL RENTAL EXHIBITION (IRE)

June 9-11, 2020
Maastricht, The Netherlands

inspHire goes direct

UK rental software company inspHire has acquired the inspHire-related business from Australian reseller Elev8 Australia.

Elev8 has been selling InspHire software in Australia for more than ten years, but InspHire now plans to service customers directly. The move falls in line with inspHire's plans to establish itself in Australia and Asia. It is already operating in Europe, North America and Africa.

Graham Dobbs, Managing Director of inspHire, said, "Growing our business in the Australia and Asia markets is a key part of our global strategy. The new office in Australia brings the number of inspHire offices to four globally, including the UK, Netherlands and USA.

"Now with the global reach and backing of Kerridge Commercial Systems Group, we have never been better positioned to continue the inspHire growth story and serve our customers."



The host of this year's ERA Convention Alex Taylor (right) speaking with (from left) Marijn Bijleveld from CE Delft, and Leonardo Verkooijen and Martijn In't Veld from Climate Neutral Group

Rental's carbon footprint

The preliminary results of a study commissioned by the European Rental Association (ERA) to look at the carbon footprint of renting rather than owning equipment did not provide any simple answers, but the study paves the way for the creation of a CO₂ Calculator.

The results were presented at this year's ERA Convention, held in Madrid, Spain – the theme of which was 'Rental: A Sharing Economy', reflecting the growing recognition that we need to make the transition from a linear economy to a circular one.

At the convention, Michel Petitjean, ERA Secretary General, suggested that rental is inherently sustainable because it facilitates shared usage and promotes reparability and reusability. So when the ERA asked Climate Neutral Group (CNG) to conduct a study on whether rental was more environmentally friendly than ownership, it might have been

expected that the simple question would have a simple answer. Not so.

With the intention of comparing the carbon footprint of rented equipment with that of owned equipment, CNG – working in collaboration with CE Delft and SGS Search – took a representative selection of equipment types, from excavators to drills, and broke down their life spans into three phases: production, usage and end-of-life.

The difficulty, however, lies in pinning down figures for an 'owned equipment' comparison. Without a fixed example to compare against, it cannot definitively be said that rental is more environmentally friendly.

The picture is also complicated by the fact that within the rental model there are good and bad practices that can affect its carbon footprint. For instance, equipment might not be optimised for a given task, with a

rental company providing an oversized machine to a customer. In this way, the positive effects of high utilisation rates and shorter transportation distances can be undone.

The full report is due to be published on 15 June this year, and that is just the first phase of the project. Ultimately, the ERA intends to develop a CO₂ calculator that rental companies can use to estimate the carbon footprint of their equipment.

Doosan's 30 tonne DX300LC-5 crawler excavator has won the EquipmentWatch Lowest Cost of Ownership (LCO) Award in the medium crawler excavators category for the second year running. Organised by US specialist data firm EquipmentWatch, the awards consist of 15 different categories of machine and winners chosen according to lowest cost of ownership over a five-year span. The LCO Awards are based on empirical data regarding the long-term cost of equipment.

Riwal and Jungheinrich partner internationally

Riwal, which specialises in the rental of aerial work platforms (AWPs) and telehandlers, has agreed to cooperate with intralogistics provider Jungheinrich on an international scale.

With the aim of providing a global one-stop shop for forklift trucks, AWPs and telehandlers to both of the companies' customers, Jungheinrich will use Riwal AWPs for logistics centres, while Riwal will be able to offer Jungheinrich forklifts to its customers in other segments.

The programme has already begun in the Netherlands, Belgium, Slovenia and Germany, with other countries to follow over the course of 2019.

Pedro Torres, Riwal Chief Operating Officer, said, "Riwal is pleased to be able to provide a broader range of

equipment to our customers as a result of this agreement. We are delighted to cooperate with a leading company such as Jungheinrich that has a strong international reach in the intralogistics industry."

Kerk Wichmann, Director of Rental at Jungheinrich, said, "Customer focus is key to Jungheinrich. By working with Riwal, we can serve the market with an expanded and optimally coordinated product portfolio.

This partnership makes the rental of forklift trucks and access equipment much easier and more efficient for our customers. We look forward to working with Riwal to leverage business opportunities as both companies share the same corporate values."



NEWS IN BRIEF

■ The Hire Association Europe (HAE) is to restructure its business, splitting its membership and SafeHire certification operations into separate internal divisions. The new structure will come into operation on 1 June this year. At the same time, Graham Arundell will step down as Managing Director to take up a part-time role as CEO to oversee the implementation of the new set-up. Rupert Douglas-Jones will lead the Member Services division as Executive Director, and Carl Bartlett has been appointed Executive Director of SafeHire Certification Services.

■ The ERA says Europe's rental industry will benefit from resilient construction markets in 2019 and 2020. Germany is expected to see average annual growth this year and next of more than 4.8% – compared to around 3.7% in the previous estimate – while Poland will see average annual growth rising to almost 8%, an increase from the previous estimate of 6.2%. The forecasts for France and the UK – 3.5% and 2.2%, respectively – have not greatly changed, while the rental growth forecast for Italy has declined from almost 4% to less than 3%. Overall, average annual rental growth of 4.8% is forecast in 2019 and 2020.

■ Coates Hire, Australia's largest equipment rental company, has continued to experience weakness in project commencements, according to Seven Group Holdings (SGH). SGH, which owns Coates, recently upgraded its full-year 2019 guidance, saying that the weakness in project commencements highlighted in the group's first-half 2019 results has continued into the third quarter.

Loxam pledges €10m for Notre Dame

French rental company Loxam said it will donate €10 million worth of rental services over the next five years for the reconstruction of Notre Dame cathedral. It said it had pledged to provide free machines to the companies and tradesmen who will take part in the restoration.

"Notre Dame de Paris Cathedral is the legacy of accomplished builders that we ought to preserve", said Gérard Deprez, CEO of Loxam,

"As a committed rental operator, Loxam wishes to contribute to the rehabilitation of this monument by providing equipment for an overall €10 million value over the upcoming five years".

Loxam is just one of the French businesses to pledge money for the rebuilding effort. Two of France's biggest contractors, Bouygues and Vinci, have also promised money and expertise.

United leadership team chosen by Flannery

Matthew Flannery, who took over from Michael Kneeland as president and CEO of United Rentals on 8 May, has named his executive leadership team.

Paul McDonnell has been appointed as Chief Commercial Officer and Dale Asplund has been promoted to Chief Operating Officer.

McDonnell will lead the company's specialty rental operations domestically and abroad, with company-wide responsibility for sales, marketing and digital commerce.

Asplund will be responsible for the company's general rentals segment. In addition, he will continue to lead the company's functional organisations

for information technology, corporate fleet management and procurement.

Also continuing to serve on the executive leadership team are Craig Pintoff, Chief Administrative and Legal Officer, and Jessica Graziano, Chief Financial Officer.

It was also recently announced that Norty Turner will lead an expansion of United's services business as Senior Vice President, Service & Advanced Solutions.

In his role, Turner will be responsible for expanding its businesses in areas such as servicing and management of customer fleets, training, and advanced solutions.



Norty Turner



The cathedral caught fire on 15 April

Germans Homs buys Llogater

Germans Homs has acquired Girona-based Llogater, which specialises in the rental of equipment for events.

With this move, the Spanish rental company Germans Homs will be adding two new commercial branches to its footprint – one in Sant Julià de Ramis, Girona, and the other in Llers, Figueres – thereby strengthening its position in the Spanish rental market. The company will create a division specialising in the rental of machinery and generators for events.

IRN Rental Share Index

COMPANY		SHARE PRICES			% change
		Start date 07/01/06	Previous mth 28/03/19	Current mth 29/05/19	
Aggreko (UK)	£	2.75	8.89	9.23	3.8%
Ashtead Group (UK/US)	UK£	1.83	21.26	22.37	5.2%
Cramo (Fin)	€	13.0	17.90	17.48	-2.3%
Emeco	US\$	–	1.92	1.92	0%
GAM SA (Spain)	€	8.00	1.38	1.35	-2.2%
Herc Rentals	US\$	–	37.27	36.16	-3%
HSS Hire	UK£	–	33.44	35.25	5.4%
H&E Equipment	US\$	–	24.83	25.55	2.9%
Kanamoto	Yen	–	2713	2494	-8.1%
Mobile Mini (US)	US\$	46.2	33.97	32.28	-5%
Ramirent (Finland)	€	23.43	5.43	5.38	-0.9%
Speedy Hire (UK)	UK£	8.32	0.55	0.34	-38.2%
United Rentals (US)	US\$	24.9	110.80	116.5	5.1%
VP PLC	UK£	–	10.10	7.28	-27.9%
IRN INDEX		100	342	326	-4.7%

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



NEWS IN BRIEF

■ Riwal will invest almost €100 million in its fleet this year, which is an increase on the €88 million spent on machines in 2018. As in 2018, the investment will be split 25% for fleet renewal and 75% for expansion, in support of Riwal's international growth strategy. 2,000 units will be bought, and Wim van Meer, Riwal's Safety, Health and Environmental Quality Manager, told *IRN*, "a considerable proportion of the new machines will be electric and hybrid."

■ Solatainer, a solar-powered off-grid generator, has been acquired by UK rental company Prolectric from Gaia Renewables. The Solatainer generator can deliver up to 25kW of reliable, on-demand off-grid power. Modelled on a standard 20ft (6m) shipping container, its array of photovoltaic solar panels charge on-board lithium-ion or deep-cycle lead-acid batteries.

■ The equipment and event rental industry in North America is set to surpass US\$61.3 billion in revenue this year, according to the latest ARA forecast. This represents a 5% increase compared to 2018. Although this is slightly down from the 5.3% previously forecast, it remains a strong figure, with steady growth expected to continue.

Rental activity drives up French equipment sales

Strong rental activity has driven sales of construction equipment in France to new highs, according to the latest figures from CISMA (the French association of equipment manufacturers of the construction, infrastructure, steel and handling equipment industries).

In the first quarter of 2019, six new records were achieved. Sales of mobile elevating work platforms reached a peak of 3,545 units, exceeding the record levels seen in 2000-2001 and 2007-2008. Compared with the first quarter of 2018, the market is up 10%. This rise was attributed to an almost 13% rise in sales to rental companies.

Sales of compact earthmoving

equipment increased by 14% overall, compared to the same period a year ago. Again, this was driven by a 32% rise in sales to rental companies, as well as a 4% increase in sales to other businesses. Mini crawler excavator sales grew by just over 10% with 3,910 units sold. Sales of crawler excavators from six to 12 tons showed significant growth of 18%, while wheeled loaders weighing less than 5,500kg rose by 23%. Sales of compact loaders jumped by 59% in the first quarter of 2019, compared to the equivalent period of 2018.

Finally, in the first quarter of 2019, telehandler sales for the construction and industry markets grew overall by

42% compared to the first quarter of 2018. Sales to rental companies rose sharply.

Equipment sales have been buoyed by a healthy construction market in France, boosted by the Grand Paris project. Activity has been driven by local government spending, private investment and ongoing infrastructure projects, such as the French high-speed broadband plan and the French motorway plan. Also, in the building sector the level of order bookings remains high.

Sunstate collaborates with Built Robotics

Sunstate Equipment is partnering with Built Robotics to supply autonomous construction equipment in its rental offering.

Built Robotics, founded in 2016, develops autonomous machines. It designs and manufactures a kit that can be used to upgrade off-the-shelf equipment from any brand, so that

operators can upload job files and then leave the equipment to complete the work by itself.

The partnership is currently focused on identifying the initial set of equipment and rental locations. Sunstate will begin offering Built-upgraded autonomous equipment to select customers in late 2019 or early 2020.

Built and Sunstate will work together to ensure that customers' personnel receive comprehensive training to run autonomous equipment safely and effectively.

Other rental companies that are currently working on autonomous operation machines include United Rentals, with skid steers, and EquipmentShare, for compaction rollers.



German company MAKS Kampfmittelbergung, a specialist in ordnance clearance, recently helped to remove a World War II aerial bomb using bomb-proof machines from HKL. The device was uncovered during exploratory work on a building site at Rostock's Rose Garden. Rostock was the target of many air raids during the war. The two Doosan DX140 excavators supplied by HKL were fitted with safety glazing to protect the operators in the event of an explosion.



Built Robotics' autonomous AX-162 excavator

Rental information from *IRN*

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

IRN news App and tablet edition

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Subversive Innovation

Innovative technologies such as dedicated axles, overall component downsize, lower counterweight for lower center of gravity and lighter machines, modular design for ease of maintenance and interchangeability of parts.

Subversive Performance(Compared with the same model in the industry)

The maximum working height heights have been increased by more than 2m to 30m on the telescopic Boom Lifts is 30m and 28m the Articulating Boom Lifts. Both models can be loaded into a standard container.

Maximum SWL increased by more than 30% to 450kg on telescopic booms and 320Kg on articulating Boom Lifts.

Maximum Horizontal Reach is increased by more than 1m.

Maximum gradeability is 50%, an increase of more than 20%.

The weight of the whole machine will also be 1 ton lighter.

Subversive Maintenance(Low maintenance costs)

With a family-style modular design, 95% of the parts and more than 80% of the structural components are common across the range.

More convenient maintenance and lower cost of components storage.

Simple to maintain with integrated component down design.

With dedicated axles, the failure rate is lower.

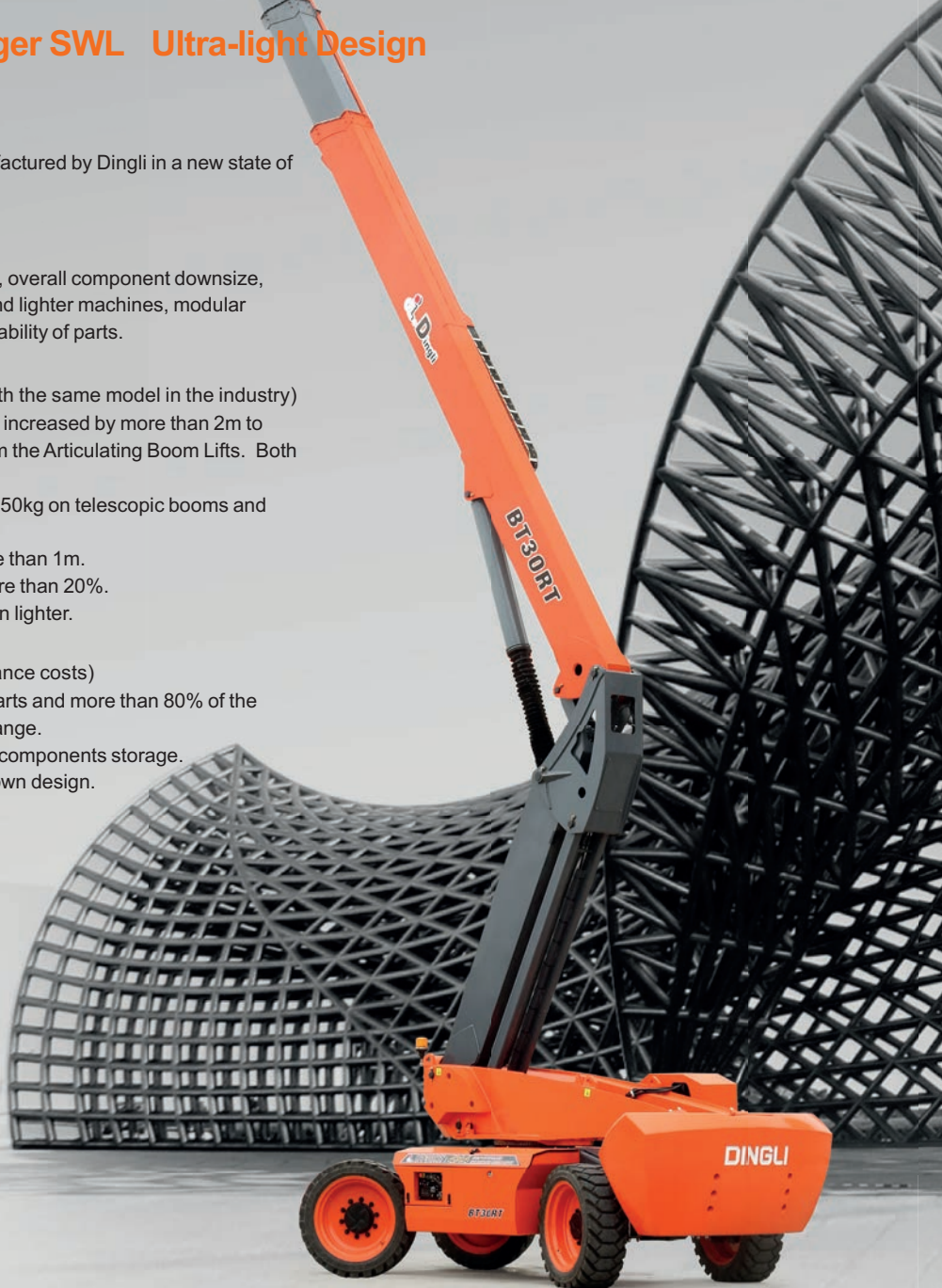
Telescopic Boom Lifts

BT24RT(24m) **BT26RT**(26m)

BT28RT(28m) **BT30RT**(30m)

Articulating Boom Lifts

BA24RT(24m) **BA28RT**(28m)



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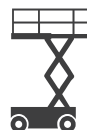
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NEWS IN BRIEF

■ Equipment rental company Boels Rental is adding the Barreto 305GB stump grinder to its rental product range, based on positive customer feedback relating to Vanguard's V-Twin engine. The Netherlands-based company will introduce the new stump grinder units, which feature the Vanguard V-Twin engine, across its European network as part of its strategic collaboration with engine manufacturer Briggs and Stratton.

■ GAM Alquiler, Spain's largest rental company, will partner with Trackunit to provide telematics for 18,000 machines in its fleet. The agreement follows successful trials of the system in GAM's European and Latin American businesses. The technology will enable GAM to offer new services to customers and monitor equipment usage more accurately. The Trackunit Go App and Trackunit Manager software will allow service technicians to analyse machines and schedule services and repairs at a convenient time. GAM has already started training, installation and back-end implementation of the system.

■ Morris Site Machinery is preparing to develop a new €6 million head office and production facility close to Wolverhampton and just a few miles from its existing base at Four Ashes. The plant, which the lighting tower and genset supplier hopes will be completed by summer 2020, will be located next to a Jaguar Land Rover manufacturing plant. The 6,040m² facility will be almost double the size of its existing factory and significantly increase production capacity.

Finnish module fleet bought by Ramirent

Ramirent Finland is to acquire the site accommodation rental business of Rocla Solutions Oy, one of Finland's largest manufacturers and distributors of industrial forklift trucks. The deal includes its module fleet and existing rental contracts. The purchase price has not been disclosed.

Rocla Solutions' accommodation business was focused on industrial and logistics companies. In addition to the fleet acquisition, the companies will strengthen their co-operation in providing full-scale rental services, especially for larger industrial and logistics customers.

"This acquisition supports perfectly our strategy execution in Finland", said Mikael Kämpe, Managing

Director of Ramirent Finland, "The Rocla Solution's site modules are modern and well equipped, and they fully complement our rental module offering. With this transaction, we will further strengthen our position as the leading rental service provider for the industrial customers in Finland".

Jukka Viinikainen, Managing Director of Rocla Solutions Oy, said the deal would strengthen its co-operation with Ramirent; "Intralogistics solutions, including strong development of digital services, are at the heart of our business. Combining our knowledge of internal logistics with Ramirent's offering enables us to offer more extensive solutions for our customers".

Hitachi invests in UK-based rental firm, Synergy Hire

Former One Call Hire directors Anthony and John Fitzpatrick are jointly running a new UK rental business that is owned by Hitachi Construction Machinery.

Synergy Hire, based in Letchworth, will offer self-drive rental of Hitachi excavators and breakers. Its fleet will comprise ZX26U-6, ZX48U-6 and ZX85US-6 mini and compact excavators, as well as larger machines from the ZX130-6 to the ZX210LC-6.

Although Synergy Hire is not being marketed as part of Hitachi's Premium Rental dealer initiative in Europe, it can be viewed as a UK-specific variant of the manufacturer's push into rental.

"The UK construction machinery rental market is proven," says Synergy Hire Director John Fitzpatrick, who

runs the company with his brother, Anthony. "We offer the latest machinery, which is well maintained, and contractors have a fixed cost per week, with no machines lying idle."

He added, "We don't have any variations in our fleet, as we're focusing solely on Hitachi mini and medium excavators in order to offer an unrivalled level of service.

"For example, our engineers are trained by Hitachi Construction Machinery (UK) Ltd, they carry only Hitachi Genuine Parts, and have specialist knowledge of our machines."

Synergy was established in January 2019 with ten employees, including former One Call Hire managers Dean Hardy, who will be Head of Business Development, and Garry Orr, Director of Operations.

The company has just taken delivery of the first Zaxis-6 mini excavators in the UK. Hitachi said the machines are also the first Stage V-compliant minis to enter the UK rental market.

PEOPLE NEWS

■ Western Global, a provider of portable tanks and dispensers, has appointed **Jim Davis** as the southern US National Accounts Manager for its newly developed rental and equipment division. He will focus on supporting and growing the national accounts within the equipment rental channel through his network of relationships with regional fleet management teams across southern US.

■ **Kevin Haycock** has left A-Plant and his position as the Chairman of the ERA's Sustainability Committee to take up a new challenge in construction.

■ US-based drilling equipment manufacturer Little Beaver has welcomed **Joseph Haynes** as a fourth-generation team member. He is a new product engineer at the company's manufacturing facility in Livingston, Texas. President of Little Beaver Joe Haynes said, "Joseph grew up around this business and understands our vision for building safe and dependable products, while going the extra mile to serve our customers."



■ Point of Rental is expanding in Africa, with the appointment of **Kelly Hoffman** as the new Africa Business Manager, based in South Africa. Hoffman will aim to build the software company's presence across the continent by helping African rental companies to develop their businesses, using her combination of equipment knowledge and entrepreneurial experience to drive their success.

Mateco Spain buys Afron to become market leader

Mateco Spain has announced the acquisition of rental company Afron after buying 100% of the shares in its parent company, Afron Capital.

According to Mateco, Afron is the oldest firm specialising in the rental, sale and repair of aerial platforms in the Iberian Peninsula.

The company currently has a turnover of €16 million and a fleet that exceeds 1,000 units. In addition to its operations in Spain it rents platforms in Chile and Panama.

Alberto Gutknecht Donoso, owner and manager of Afron, said, "We are very pleased with the fact that our company is joining forces with the group that we consider the European leaders in the rental of lifting platforms."

He added, "The drive given by the incorporation of Afron to Mateco will be the basis to position ourselves as market leaders in the industry."

This acquisition follows Mateco's plans for strategic growth by increasing its business coverage in Spain, Latin America, Chile and Panama. It said it has more branch openings planned for 2019.

From left: Anthony Fitzpatrick (Managing Director), Dean Hardy (Head of Business Development), John Fitzpatrick (Managing Director) and Garry Orr (Director of Operations)





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Costing the Earth?

“By polluting the oceans, not mitigating CO₂ emissions and destroying our biodiversity, we are killing our planet. Let us face it, there is no planet B.”

EMMANUEL MACRON, President of France, in his April 2018 speech to the US Congress

“If we stopped producing oil and gas tomorrow we would have an economic crisis. We would have famine and we would have a world war.”

MAARTEN WETSELAAR, director of integrated gas and new energies, Shell

As the issue of sustainability increasingly influences business decisions, Kevin Appleton examines the role the rental industry might have in mitigating our impact on the environment



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

There, dear reader, we have the tensions that currently dominate headlines around the developed world. On the one hand, if we don't change our ways then there will be no survivable planet for our great-grandchildren to live in – and the world's youngsters are starting to catch on to this uncomfortable fact. On the other hand, if we change our ways too dramatically then we will have famine, crisis and war. Heads we lose, tails we lose.

These are grand issues and yet, in their way, they are coming to influence debate and decision inside the rental industry too. What does the equipment rental industry contribute, positively or negatively, to factors which have been associated with climate change? (I don't have space here to get into a debate about whether man-made climate change is a “thing” or not and am assuming, along with the vast majority of the world's climate scientists that it probably is. Even if it isn't, I think there are sound ethical arguments to be made against unnecessarily polluting the planet anyway).

Greenhouse gases

What contributes to the production of greenhouse gases is a good place to start (although concern about planetary destruction has recently come to focus on use of plastics too). The big 5 (according to the World Resources Institute) are Electricity and Heat Generation, Industry (including construction), Transport (air, sea and road), Agriculture and Land Use Change (deforestation), which between them make up around 80% of greenhouse gases. As an industry we are implicated in three of these – power generation (as consumers of electricity), Industry (as manufacturers and as part of the industrial supply chain – especially in construction) and Transport (moving finished product around the world, and to and from jobsites within a country).

And at this point it's hard to resist simply waving our hands round and crying “somebody (else) ought to do something” because it starts to get difficult. Practically, what can we do? Well, there are some simple, uncontroversial, steps. We can ensure our energy use is as efficient as it can be (low energy light systems, renewable energy wherever possible) and reduce the waste we put back into industrial processes. We can also ensure that methods of transport used are as appropriate and energy efficient as possible. Then it starts to get hard.

Because the truth is that fundamental shifts in what we are putting into the planet's ecosystems

require decisions which, at the moment and under present taxation regimes, are economically illogical. We would want to favour manufacturing in countries which have the cleanest energy rather than the lowest energy (and labour) costs. Immediately that would disadvantage manufacturing in China, which is still a disproportionately high polluter (but only because they're late to the party, by the way – the West has a 150-year pollution head-start). We would want to focus on recycling equipment rather than continually manufacturing new. All those lovely production lines need to be stripped out and replaced with work cells where old equipment is patched up and made workable again. We would also need this refurbishment or remanufacture of equipment to take place as close to end-demand as possible, in order to reduce sea and air transport. Finally, we'd need to see much greater use of electrically powered delivery vehicles, topped up using clean energy.

For some of these things the economic (and, maybe, moral) motivation doesn't yet exist. It's likely that this will only change once tax and incentives start to reward economically counter-intuitive behaviours. In other areas it requires technology that doesn't yet exist and where, again, incentives will be needed to kick-start the necessary innovation.

Reason to hope

There is hope. In the UK, for example, electricity generation capacity from renewables recently passed that from fossil fuels, having grown 300% in five years. Much of this has been down to targeted government incentives and penalties and, as a consequence, the costs of renewable energy are now becoming competitive with traditional fossil-fuel forms. However, for the major breakthroughs to be made more industries will have to experience the transitional pains (and maybe extinction) of the European coal industry, for example. Maybe even parts of our industry will be required to completely rethink their purpose – moving from centralised manufacturing into geographically distributed, low-impact recycling, remanufacturing and repurposing of equipment.

The rental industry is “a good thing” for the environment in that it encourages more efficient use of assets, although it has probably also been responsible for simply introducing more assets, too. However, we are only at the beginning of a long and difficult journey and the landscape of 100 years time will look very different, one way or another. **IRN**

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Remaining positive

Optimism among European rental companies has moderated compared to recent highs but remains positive overall, with utilisation rates stable or increasing and investment levels maintained. Thomas Allen reports on the ERA/IRN RentalTracker for Q1 2019

The sentiment within the European rental market has remained relatively positive over the past couple of years, though there has been a gradual downward trend since the high in the first quarter of 2017. This has continued in the latest RentalTracker survey undertaken at the end of March this year, with the positive balance of opinion on current business conditions dropping from 44% in the third quarter of 2018 to 32% now.

That said, this is still a strong figure, considering it had struggled to reach above 25% between 2011 and 2016. (The 'balance' figure recorded for each question in the survey is the percentage of positive responses less the percentage of negative responses.)

Current business conditions

Looking at the overall trend of current market conditions, 44% of respondents said they felt market conditions were improving, which was only slightly counterbalanced by 12% of respondents who saw



a deterioration, giving the positive balance of 32%. This compares to a balance of 44% in the third quarter of 2018 and 50% in the first quarter. The current 32% balance, although historically high for the survey, is the lowest since the first quarter of 2016, when the figure was just 18%.

It is also worth noting that we had more than 155 responses to the survey, which is the highest for several years and more than double the number for the same quarter in 2018. (IRN thanks the various rental associations in Europe for their help in distributing the survey.)

FIGURE 1

Europe: Business conditions now

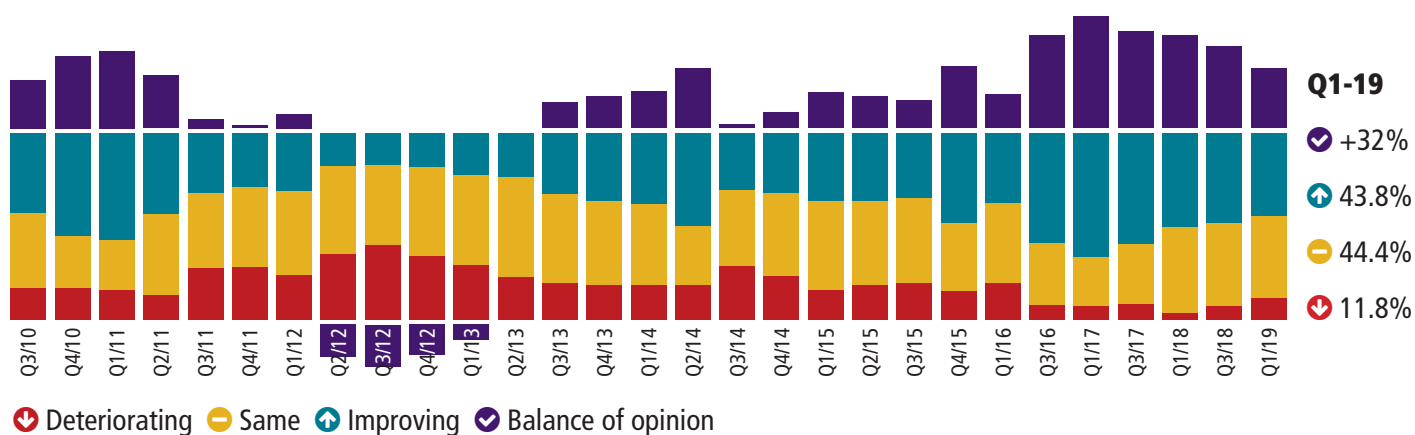


FIGURE 2

Europe: Expectations for year from now

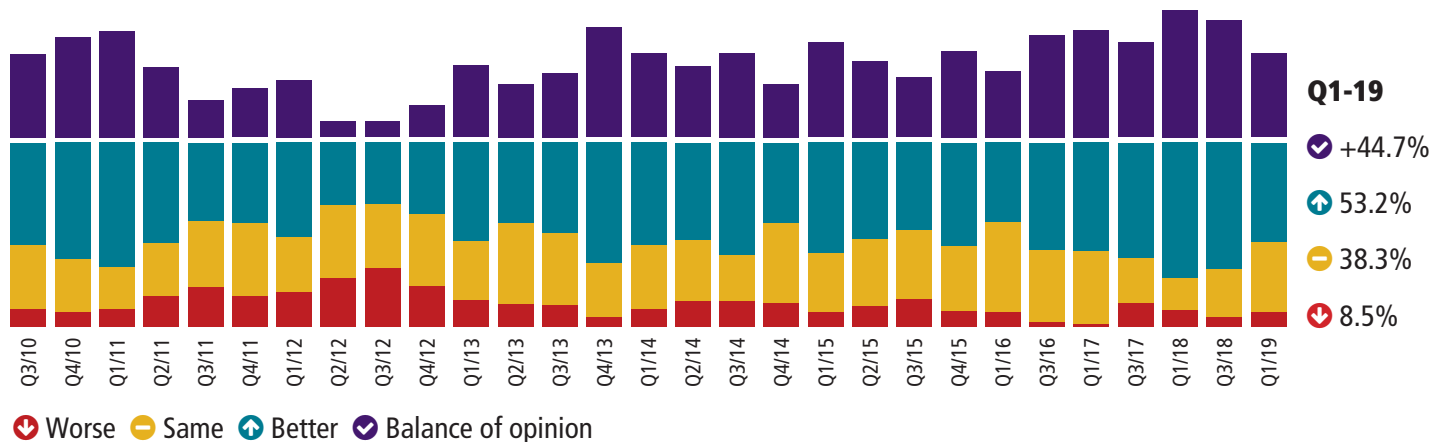
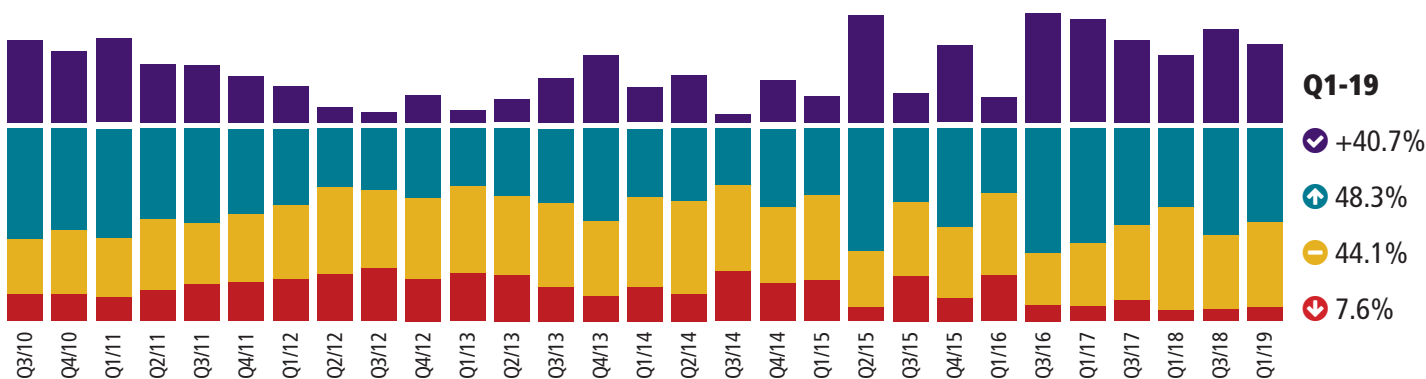


FIGURE 3

Europe: Time utilisation trend



Jack, 27 yr. crane operator

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- ↘ Deteriorating
- ↔ Same
- ↗ Improving
- ⊖ Balance of opinion

“ The sentiment in Spain remains particularly positive, with 67% of companies seeing conditions improving ”

Breaking it down by country, the sentiment in Spain remains particularly positive, with 67% of rental companies seeing conditions improving and the remaining third experiencing a stable market; none of the Spanish respondents are seeing a deterioration of market conditions. However, this compares with 90% of respondents saying conditions had improved in the previous RentalTracker for the third quarter of 2018. It should be taken into consideration that the market is recovering from a low base following the financial crisis.

Among the most positive

The next most positive market is Germany, with 64% of firms reporting improved market conditions and 36% saying there was no change. None of the German respondents – on a good sample number – said conditions were deteriorating. The German rental market has enjoyed stable growth for almost a decade now, and there seems to be no immediate sign of a decline.

Just behind Germany is the UK and Ireland. Despite concerns around Brexit, the responses from UK and Irish companies were encouraging, although it is important to note that the sample size was small. No one is suffering a drop in business, while 45% of respondents are enjoying buoyant market conditions.

French firms have also expressed confidence about the market, with 46% reporting a steady market, 42% saying conditions are improving and just 12% seeing a decline.

Of the multinational companies, 50% said overall market conditions were currently improving, but 33% reported deteriorating conditions. It seems that Europe’s largest rental businesses are viewing the market less positively than their smaller or national competitors.

The degree of positivity in each country was largely

mirrored by the general perception of year-on-year growth, comparing Q1 2019 with Q1 2018. Spanish and German respondents reported the highest levels of growth compared to the first quarter of 2018 – 68% and 52% respectively. The UK bucked the trend a little, with just 36% of firms saying they had experienced year-on-year growth. With that said, 55% had seen no change and just 9% reported negative growth.

Stepping back

Taking Europe as a whole, 52% reported year-on-year growth, representing a drop from the 63% recorded in the previous RentalTracker six months ago. Also, the overall balance figure for year-on-year growth came to 42%, which is also down on the record 58% recorded for the third quarter of 2018. Though this latest positive balance on year-on-year growth is still relatively high, it is the lowest since the first quarter of 2016.

What are rental companies thinking about business conditions a year from now? There was a positive balance of 45% of respondents expecting market conditions to be better in the first quarter of 2020. This is a drop from the 62% recorded in the previous RentalTracker, as well as the 67% in the first quarter of 2018.

Overall, European rental businesses remain optimistic about business conditions a year from now, just slightly less optimistic than they were six months ago.

Germany was the most positive about the next twelve months, with 67% of companies expecting to see growth and just 6% predicting a slight decline. Perhaps surprisingly though – given the issue of Brexit – UK and Irish respondents were similarly optimistic, with 60% of respondents saying they should see growth. Not a single one is anticipating a decline. Again, we caution against overstating this finding because of the sample size.

Less surprising is Spain's optimism, with 59% expecting growth over the next twelve months and just 5% foreseeing a drop in business.

Investment

Investment is a powerful barometer to gauge a company's outlook and, in terms of fleet investment overall in Europe, 42% said they would increase investment compared to 2018, while 44% said spending would remain the same.

Just 14% of respondents said investment this year would reduce. Although a very positive finding,

it represents a slight weakening of investment intentions.

Germany appears to be feeling most bullish, with 64% of respondents planning to increase the level of capital expenditure in 2019, and none intending to reduce investment. Similarly, 41% of Spanish respondents see investment growing over the course of the year, though 14% are expecting to cut back on capital expenditure. Not far behind was the UK and Ireland, with 38% of companies looking to bolster investment and none intending to reduce it.

The least confident about future investment were the multinational companies, with 22% foreseeing a reduction in capital expenditure in 2019 versus just 11% saying they will increase spending. French respondents were similarly divided, with 28% reporting that investment will rise and 17% saying

Thank you

More than 155 companies responded to the ERA/IRN RentalTracker survey for Q1 2019.

Thank you to all the rental businesses that took part and to all the companies and associations that helped to promote the survey throughout Europe.

The RentalTracker for Europe is a joint venture between IRN magazine and the European Rental Association (ERA).

If you have any suggestions about how the survey could be improved, please contact the ERA on: era@erarental.org or, Thomas Allen, IRN Editor: thomas.allen@khl.com

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TABLE 1

Forward thinking

PERCENTAGE FORECASTING BUSINESS
TO BE 'BETTER' OR 'MUCH BETTER'

12 MONTHS AHEAD (third-quarter 2018 in brackets)

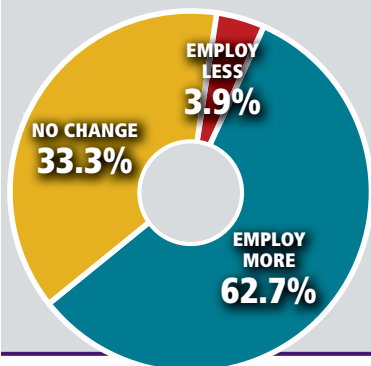
✓ Spain	59%	(100%)
✓ France	30%	(79%)
✓ All Europe	53.2%	(68%)
✓ UK/Ireland	60%	(64%)
✓ Germany	67%	(53%)
✓ Multinationals	50%	

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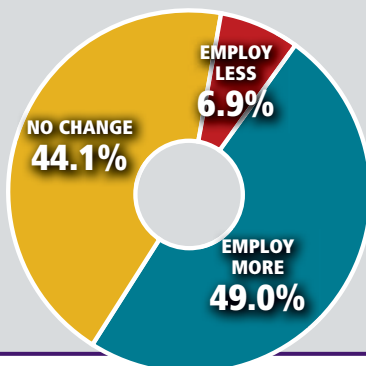
FIGURE 4

Europe: Employment intentions for next quarter

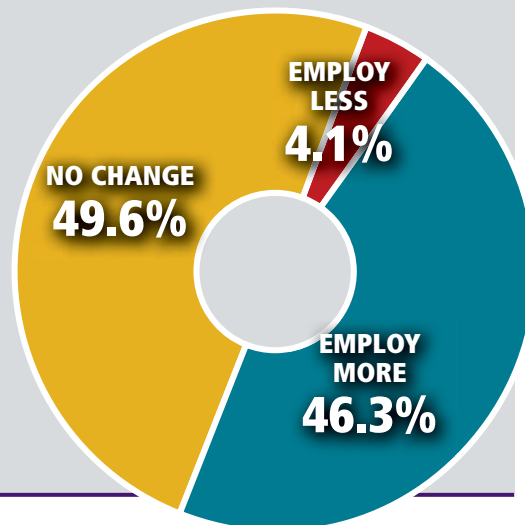
Asked end of Q1 2018



Asked end of Q3 2018



Asked end of Q3 2018



it will drop, which means the majority will maintain 2018 spending levels this year, which is not a bad situation.

Employment intentions

Meanwhile, the employment intentions of Europe’s rental companies have not shifted greatly from the positive picture found six months ago. Fully 46% of companies will employ more staff in the second quarter of 2019, while 50% will not change their staffing. A tiny proportion, just 4%, reported that they would cut employment.

The response from French companies was the most encouraging, with 57% of respondents expecting to employ more in the second quarter of the year, and none believing they will reduce their workforce, although one respondent commented that it is

difficult to recruit new employees. Closely behind was the UK and Ireland, with 40% of firms looking to grow employee numbers in Q2 and, again, none considering a reduction.

Despite a robust market, German respondents seem to be a little less hasty about employing more people – just 27% intend to do so in 2019, and 20% say they will reduce the number of staff.

Time utilisation

The notable, and pleasing, feature of the utilisation data in the Q1 survey is that fewer than 8% of respondents were reporting falling time utilisation rates on their fleets. Almost 50% said utilisation was improving while the balance of respondents, 44%, said it was stable.

Although representing a slight softening of the

picture from Q3 2018, it still represents a very positive environment, and maintains the findings from the past two years.

Multinationals were the most positive on utilisation – 67% reported increasing utilisation in Q1 2019 – closely followed by Spain (59%) and then Germany (50%). In France, there was a notable softening in utilisation, with just 22% reporting an increase, which compared to 61% in Q3 2018.

The Q1 2019 survey paints an overall positive picture of rental sentiment, although with evidence of a softening of conditions starting to creep in.

It remains to be seen whether the UK will have left the EU by the time of the next Rental Tracker survey, at the end of September. That is just another of the uncertainties that businesses in Europe are facing.

IRN

TABLE 2

The here and now

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

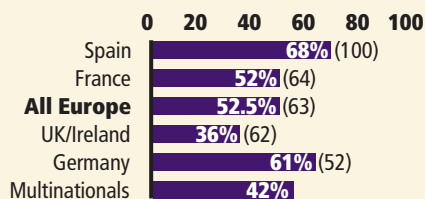
PERCENTAGE OF COMPANIES EXPERIENCING IMPROVING MARKET CONDITIONS (END Q1, 2019)

- Spain 67%
- All Europe 43.8%
- UK/Ireland 45%
- France 42%
- Germany 56%
- Multinationals 50%

NOTE: Balance of opinion = proportion seeing improvement - proportion seeing worsening conditions.

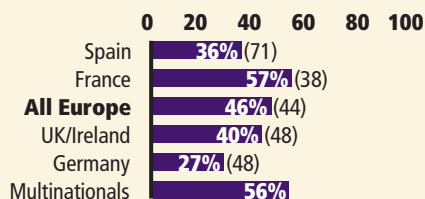
PERCENTAGE REPORTING Q1 2019 GROWTH VS Q1 2018

(first-quarter 2018 brackets)



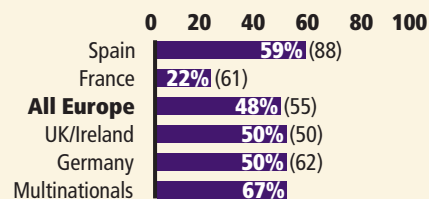
PERCENTAGE WHICH WILL EMPLOY MORE IN Q3 2019

(third-quarter 2018 brackets)



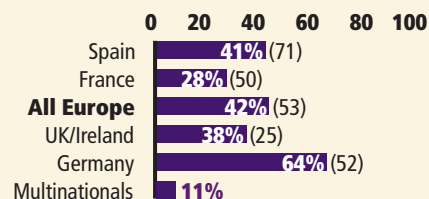
PERCENTAGE WITH INCREASING UTILISATION IN Q3 2018

(third-quarter 2018 brackets)



PERCENTAGE EXPECTING TO INCREASE INVESTMENT OVER THE COURSE OF 2019

(third-quarter 2018 brackets)





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Digitalisation is a key part of Cramo's strategy. The company recently launched an online portal and two mobile Apps

Taking shape

As Cramo adapts to the changing face of rental, the company's CEO Leif Gustafsson and its Senior Vice President of Group Fleet Management Martin Holmgren share with *IRN* some of the new opportunities that are emerging. Thomas Allen reports

Cramo is morphing in response to a changing rental industry. Indeed, the Finnish rental company is embracing that change and looking to direct it from a strong market position.

The company reported solid growth in 2018, with

sales for the full year coming to €779.8 million, up 6.9% on the previous year, and profits increasing by 8.3% to €130.1 million – although the picture has been a little more mixed in the first quarter of 2019.

This has been helped by positive market conditions in the fourteen countries where Cramo operates. In an interview at Bauma, Leif Gustafsson, the company's CEO, told *IRN* the markets are performing well in the Nordics, especially in its home country of Finland and even in Sweden where a decline in Stockholm has been more than offset by increases elsewhere in the country.

Eastern European countries, where Cramo has a relatively small presence, are also enjoying good conditions, and the only exception in the Baltics is Estonia, where the market is levelling out a bit.

Gustafsson describes Germany as "the diesel in our business," because it's a steady market without extreme peaks and troughs. Elsewhere in Central Europe, he singles out Austria as a healthy market, as well as the Czech Republic, which after a slow period has picked up, with a significant increase in investment in residential and non-residential developments.

Continued growth

In almost all these markets, Gustafsson predicts continued growth in 2019. The one country for which he hesitates to give a forecast is Russia, saying, "It is difficult to predict the Russian market. It has been quite challenging for a couple of years," but he added, "Our joint venture with Ramirent under the brand Fortrent has managed that market situation fairly well."

In such buoyant conditions, it might be tempting to continue doing business as usual, but Cramo has different ideas. Ever

since the company introduced its Shape and Share strategy in early 2017, it has been aware of a shift in the industry away from simple equipment rental towards total site solutions.

"When we were in our strategy planning three years back, we all saw this at that time. We saw more services, and we believed that in the future we needed to create more value. And creating value, of course, means creating service solutions around our products," says Gustafsson.

This requires heavy investment. Last year, Gustafsson said Cramo had invested about €170 to €180 million in its fleet. Of that, about €80 to €100 million can be attributed to growth Capital Expenditure (CapEx) to grow and develop the company's fleet beyond simply maintaining it. The lion's share of that investment in growth CapEx

MARTIN HOLMGREN,
Cramo's Senior Vice President of Group Fleet Management

“ Creating value means creating service solutions around our products ”

LEIF GUSTAFSSON, CEO, Cramo



“ We are also asking how we can actually do business differently with the help of digital solutions – really thinking in new ways ”

MARTIN HOLMGREN

has been channelled into Cramo's Modular Space division – which is in the process of being spun off as a separate enterprise called Adapteo.

This is being done to capture the strong market growth seen in the modular space sector, and it is an important part of the company's Shape and Share strategy that will allow Cramo to “focus a lot on the way forwards, taking a position, as we see it, in the sharing economy,” according to Gustafsson.

Cramo has identified two important catalysts of change in the rental industry: sustainability and digitalisation. With growing awareness of the importance of sustainability, the sharing economy has a central role to play since, arguably, rental is inherently more sustainable than ownership.

“To rent is a good start to being more sustainable,” says Gustafsson, adding, “We work a lot with our customers, integrating with our customers to provide different types of solutions to help them decrease their carbon footprint by using services from us.”

The digital angle

On the digitalisation side of things, Martin Holmgren, Senior Vice President of Group Fleet Management, says, “There are three key focus areas. One is the internal part, and that's normally where you start because that's in your own control and so it's fairly easy to start there. Then there is the customer side, and we have been asking our customers how we



Cramo's stand at Bauma

can do our business in a better way with new digital features and the opportunities that lie therein. You have to integrate or collaborate with customers in a much more in-depth way. And thirdly, we are also asking how we can actually do business differently with the help of digital solutions – really thinking in new ways.”

On the third point, one example is sharing platforms. Holmgren suggests a contractor's entire fleet – not only Cramo's equipment – could be connected up, opening the door to new payment models and novel ways for customers to access rental fleets and services. This is the ‘Share’ part of the company's Shape and Share strategy.

“So there we are also looking at what we can do, how we can shape this part of the industry. It's very exciting times and there are enormous opportunities. You can do so many things. The key is to have the right mindset among the employees, the right structure, and working extremely closely with the customers. Then you will find those areas where to focus,” says Holmgren.

This concept is apparent, perhaps in embryonic form, in Cramo's latest digital products, which comprise a web portal and two mobile Apps – ProductViewer and MyEquip for Android and iOS. Together, they are designed to give users a better overview of their rentals and help them to manage equipment returns. In addition, they aid in the planning and management of documents by providing an order history.

Holmgren says, “We want to give customers an easy way to get access to our data and also give them the tools to do business transactions in an easy way. So it's about simplifying the processes.”

The web interface is not intended only as a rental portal or e-business interface; it's much broader than that.

“Of course, they can place an order on there, but also we want to give them a tool with which they can manage their fleet. They can get subscriptions to reports about what they have on site,” Holmgren says.

“We have given them tools on the web and also in the App that allow them to see instantly what they have on rent, and what they should not have and can return. So it's much more of a management tool for rental, and it will become a management tool also for productivity, safety and sustainability. More and more digital features will be loaded into that tool.”

Mobile Apps

As for the Apps, ProductViewer enables employees on the jobsite to scan equipment and get tutorials, instructions or safety manuals for any of the 230,000 pieces of equipment that Cramo offers. On the other hand, MyEquip is an equipment returns App that provides an inventory list of the rental fleet a company has on site, and invoices are connected to it to make things easy for the customer.

When asked how Cramo is making it possible for people to take machines on and off rent at any time of day, Holmgren cited the example of a container that is installed on a construction site, integrated into its boundary. The container is connected to an App through which the customer can place orders and access an entry code for the container.

Transport companies can then deliver rental equipment to the container in the evening, when there is less traffic.

Holmgren says, “The container is very secure because it's part >

Adapteo team chosen

Cramo recently announced the appointment of the team members that will head up its new modular space company Adapteo, ahead of its proposed demerger.

Philip Isell Lind af Hageby is to take up the dual position of President and CEO. A graduate of the Stockholm School of Economics, Hageby has been a member of the Cramo Group management team since 2017, previously serving as Managing Director and Senior Vice President of Inwido Group's Norwegian business area and holding various positions at Scan Coin.

Cramo's board of directors also appointed Timo Pirskanen as the new company's CFO, with Björn Kölerud taking up the position of Interim Executive Vice President, Permanent Space Business Area.


Simon Persson and Teemu Saarela will join Adapteo as Senior Vice Presidents of HR Development and Corporate Development respectively, while Hanna Wennberg will assume the role of Senior Vice President, Marketing and Communications.

Veli-Matti Reinikkala, Chairman of the Board of Cramo, said, “The board is confident that Mr Isell Lind af Hageby and Adapteo's group management team have the right capabilities, personal qualities and experience to manage Adapteo's strategy execution and growth following the completion of Cramo's proposed demerger.”

The newly appointed Adapteo team will remain in their current roles until the proposed demerger is completed. Cramo said it expects to complete the demerger by the end of this year's third quarter.

Philip Isell Lind af Hageby is to take up the dual position of President and CEO of Adapteo





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“ We are planning services. We are working together with the developer even before the construction companies are signed to the project, to see how we can set up a worksite and an area to optimise the flow of equipment and products ”

MARTIN HOLMGREN

of the fence, which means that from the construction side – the inside of the site – you can put the equipment and lock it from that side but you can open it from the other side. So you don't have to move outside with equipment and make it complex. Once again, a very simple way of working.”

This solution was recently provided to a customer in Sweden and some interesting insights were gained from the project. It was observed, for example, that workers spent less time collecting rented equipment; “They measured the amount of steps certain workers had been walking before the container was put in place and then after, and they can see that the workers can spend more time on the production part rather than walking and finding equipment,” says Holmgren.

This gives an idea of how new solutions arise from working closely with customers, and as those collaborative relationships deepen Cramo's role is morphing – as previously touched upon – into that of a total site solutions provider.

This is reflected in the company's acquisition last year of German construction site logistics company KBS Infra.

Gustafsson says, “They are more-or-less providing a full-service concept for establishing a construction site, meaning everything from electricity and fencing to security and machines on site.”

He adds, “We are doing a similar thing, though not

so advanced, in Sweden and Finland, and now we're getting this competence on board it's extremely interesting for our German business, but also across borders, spreading the knowledge and experience of KBS.”

This is also an area where Cramo sees great potential for technological development as digital technologies are increasingly offering better visibility and control of a jobsite.

Holmgren says, “We conducted a thorough analysis of the market and companies say logistics is extremely important for the construction site.” However, when asked if the logistics are being planned in the most efficient way, the consensus is that they are not; “So we know that we can do this much better. And they can also see that we can be a partner here; we can take the position as that specialist.”

Integrated partner

Holmgren goes on to say, “So that is an area we are developing now, to become that integrated partner in the production process, and not only being a machine provider. And when you are there, then you also start to learn about the processes and how they work and that's where we'll find a lot of good areas to improve the digital services as well.”

An interesting effect of this changing approach is that Cramo is beginning to assess its fleet from a different perspective; “We start to look at our fleet from a logistical point of view,” says Holmgren.

Taking the example of personnel hoists, Cramo used to simply rent out and install them, but now the company considers the best type of hoist to deploy in the context of a given jobsite. In Holmgren's words, “Now we are looking at the hoist business in terms of what kind of hoist we need in order to optimise the flow of people and materials on the site. So it's becoming a different angle on the needs rather than just the hardware or the machines.”

In this sense, Cramo's role is morphing into that of a consultant; “We are planning services. We are working together with the developer even before the construction companies are signed to the project, to see how we can set up a worksite and an area to optimise the flow of equipment and products,” says Holmgren.

Gustafsson sums up, saying, “For us moving forwards, it will be as a fully-fledged service provider that can also provide rental tools and machines. Our business will be transformed.”

IRN

Cramo intends to capture the strong growth that has been seen in the modular space sector by spinning off its Modular Division as a separate business, called Adapteo



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Wacker Neuson's battery-driven WL20e loader, with an absorbent glass mat battery

Compact wheeled loaders have gained in popularity as they have become more versatile. Thomas Allen looks at some of the latest developments encouraging people to choose wheeled loaders over other options

The tipping point

There are many applications in construction, as well as agriculture and industry, that require a small loader, but the choice of tool varies widely from region to region around the world - and it has changed over time.

According to specialist market research and forecasting company Off-Highway Research, demand in Europe for skid-steer loaders has fallen from a peak of some 12,000 machines per year in the early 2000s to between 3,000 and 4,000 machines per year more recently. While it is true that sales are growing overall in Europe, this is largely due to a general improvement in market conditions in the Southern European countries which favour this equipment type, rather than a general resurgence for skid-steers.

Some of the previous demand has been replaced by compact tracked loaders, but European sales of these machines total only 1,000 to 1,500 units per year. More significant has been the growing popularity of telescopic handlers in Europe, particularly in France and Germany.

Developments for other types of loader have also played a part. Compact wheeled loaders (under about 1m³ bucket capacity or 56kW engine power) have always been popular in Germany. The development of telescopic boom variants has opened the door to new applications and uses, and these machines come with the advantage of a higher operator position than a skid-steer loader, and also a central cab, unlike European-style telehandlers.

In North America the historical preference has been for skid-steer loaders. However, the market

for these machines peaked at a remarkable 73,000 machines per year in 2000, and last year stood at just over 34,000 units. Customer preferences have swung towards compact tracked loaders, sales of which now exceed 50,000 units per year in North America.

Regional preferences

Speaking about the overlap between compact wheeled loaders and skid-steer and compact tracked loaders, Elie Abi-Karam, Product Application Specialist at Caterpillar, tells International Rental

News (IRN), "It sometimes just boils down to a regional preference versus an actual requirement."

However, there are benefits to be had by choosing a compact wheeled loader over the other options, such as greater comfort, faster travel speeds and better visibility; "A compact wheeled loader also offers higher lift height or reach," says Abi-Karam. "The ownership and operating costs of a compact wheeled loader compared to a skid-steer with tyres or a compact tracked loader are also lower."

He added that compact wheeled loaders can offer a more familiar operating style; "The steering wheel, the two foot pedals and the single joystick makes the compact wheeled loader an easier and more versatile machine to operate for rental customers."

Going electric

A hot topic in the industry is of course electrification, and smaller machines such as compact wheeled loaders are among the first candidates for electrification because of their size.

Volvo CE recently unveiled its fully electric L25 wheeled loader, which is currently in the process of being tested by customers in pilot projects before production begins in 2020.



Production of Volvo's new full-electric L25 wheeled loader is due to begin in 2020



Tobroco-Giant's new, fully electric G2200E loader being demonstrated at Bauma 2019

Highlights

LIEBHERR – STAGE V LOADERS

The German manufacturer has introduced Stage V-compliant versions of its L506 and L508 compact loaders, and its L507 and L509 stereoloaders. Their working and driving functions are intuitive, and the compact design of the machines ensures stability and makes it easier for the operator to get a clear overview of the working area.



Liebherr L507

HITACHI – UPDATED LOADERS

Improvements made to the ZW75-6 and ZW95-6 are focused on the environment and operator safety. The updated loaders are now fitted with a Stage-V compliant engine and are available with a DPF with passive regeneration as standard. Optional higher flow for the hydraulic system can enhance versatility, with an increase in capacity to 77 litres per minute. A new pillar-less right window provides greater visibility, improving safety on busy jobsites.



Hitachi ZW75-6

MECALAC – SWING LOADER

The AS 500 is the latest model in Mecalac's Swing Loader range. It has a single-section arm with a swing radius of 180° and stability is ensured by the rigid chassis with four-wheeled steering. The AS 500 is powered by a Deutz Stage V engine and the driving controls have been arranged ergonomically to make operation more efficient and safe.



Mecalac AS 500

populated areas.

Using lithium-ion batteries, the L25 can operate for eight hours in regular applications. It has an onboard charger that enables overnight charging via a regular household socket, but a fast charging option, requiring more powerful grid access, will also be available.

Due to the greater relevance of electrification to compact equipment, Wacker Neuson is also particularly enthusiastic about going electric. Indeed, the company had an 'Electric Boulevard' at this year's Bauma exhibition.

Wacker Neuson recently introduced its battery-driven WL20e wheeled loader, which was said to offer an environmentally-friendly and efficient solution to rental companies' customers. Once again, the zero emissions and low noise levels were highlighted as factors that make this machine well suited to urban jobsites.

With a bucket capacity of 0.2m³, the WL20e is available with an absorbent glass mat battery, which is easy to handle and requires little maintenance. As a result, rental companies do not need to provide additional training to

JOHN DEERE – L SERIES

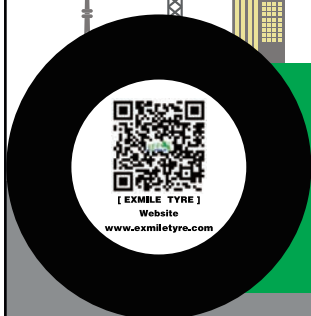
The new 244L and 324L models round out John Deere's full line of L Series compact wheeled loaders.

Drew Miller, Product Marketing Manager for compact wheeled loaders, says, "Tailor-made for tight spaces, the 244L and 324L use our proprietary Articulation Plus system to provide greater stability and yield more lifting power while turning tighter." The Articulation Plus steering combines high lift capacity with manoeuvrability.

John Deere 324L model



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Case has introduced electrohydraulic controls on its F series loaders, including the 321F pictured



service personnel for maintaining the loader.

A 230V battery charger is integrated into the machine, with which the battery can be charged via any plug socket, making it easier to charge in everyday construction work. Once charged, the WL20e can operate under full load for up to five hours, equating to a complete working day under normal conditions. What's more, its performance not only equates to but even outstrips that of its diesel-powered counterpart in some instances, such as the tipping load, which has been increased to 1,509kg due to the weight of the battery.

In response to the growing demand for environmentally friendly equipment, Tobroco-Giant also unveiled two new electric wheeled loaders recently.

The G2200E and its low-front counterpart the G2200E X-TRA are both in the 2.2 tonne class, and they come as a result of the fact that the company recognised a demand for larger electric equipment after it introduced its electric skid steer. Ultimately, Tobroco-Giant wants to offer electric versions of all its models.

The new electric wheeled loaders are powered by a lithium-ion battery that has a minimum capacity of 12.3kWh, and full production is due to begin in October 2019.

Enhanced by technology

In an effort to improve operator controllability, Case Construction Equipment has introduced electrohydraulic controls on its F series compact



Avanta 800 series loader

Highlights continued

AVANTA TECNO – LARGEST IN THE RANGE

The new Avanta 800 series loaders will be the largest and most powerful to be offered by the company, with 1,900kg lifting capacity and 3.5m lifting height. Yet their dimensions remain compact, measuring 1.5m wide, 3.4m long and 2.2m tall. Production is scheduled to start in the autumn this year. The first two models to be available will be the Stage V and Tier 4 Final-compliant Avanta 860i and the Avanta 850, which will be for markets outside the scope of the EU and US emissions regulations.

wheeled loaders. The technology has been adapted from the company's G series loaders.

With more than 20 sensors and 20 electrohydraulic actuators installed on the machines, users have the option to select different operating modes and >

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Highlights continued

SCHAFFER – ENHANCING VISIBILITY

A key driver in the design of the new 5480 Z loader was maximising visibility. As a result, the geometry of the boom, which features Z kinematics, has been revised to give better visibility of attachments. Also, the loader's spacious new cab offers improved all-round visibility.



Schaffer
5480 Z

number of manual tasks that they must perform.”
By removing the hydraulic pilot hoses, more space is created inside the machine, making maintenance and servicing tasks easier.

Control of wheeled loaders is being taken beyond the cab by Bobcat, which has introduced a Remote Control System for compact loaders that will be commercially available later this year. It is compatible with Bobcat skid steer, compact tracked and all wheeled steer loader models equipped with the company's Selectable Joystick Controls.

The system allows operators to dismount the machine and control their loader from a distance, making it suitable for dangerous environments and in disaster events such as floods and forest fires.

The plug-and-play system comprises a portable industrial radio unit that can be mounted and dismounted on machines in a matter of minutes.

Accurate and fast

To increase the accuracy and speed of loading, Doosan Infracore North America has made Trimble Loadrite L3180 SmartScale available as an option on its wheeled loaders.

With its updated weighing intelligence and solid state sensors, the system helps to optimise loadout, prevent overloading and track productivity. It can adjust for rough terrain, operator technique and machine movement, and now offers in-cab key performance indicators such as tonnes per hour so that operators can monitor their performance.

IRN

Kramer 5050



KRAMER – NEW MODELS

The new 5050 wheeled loader from Kramer is characterised by its low dead weight of 2,650kg. It offers a tipping load of up to 1,700kg, which can be enhanced by the addition of weights – ‘Smart Ballast’ – to the rear of the machine. Also new is the 8145T telescopic wheeled loader with a bucket tipping load of 5,500kg.

Cat 903D



CAT – MARKED IMPROVEMENT

Promising better performance, expanded work tool capability and enhanced operator comfort, the new 903D loader offers a 25% increase in both lifting capacity and travel speed compared to its 903C2 predecessor. New optional features include creep control.

combine machine movements. They are also given greater control over the hydraulic speed for both travel and unloading.

Egidio Galano, Case Compact Product Line Director, says, “Our customers have driven this

change. We know that automated functions reduce operator fatigue and allow operators to be more productive, even for those with less experience.”

He adds, “Moving to electrohydraulic controls improves the operator experience by reducing the

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IRN100 Notes & thanks

IRN again thanks those companies and individuals who contributed information to the survey. If you have comments, or would like to be included next year, please contact the editor. Tel: +44 (0)1892 786209

E-mail: thomas.allen@khl.com

- Rankings are based on rental revenues for 2018 (or the most recent financial year) and include sales of used fleet and consumables/contractor supplies. Where known, sales of new equipment have been excluded from the survey.
- Figures denoted (EST) have been estimated by IRN. As in previous years, figures denoted (RER) are taken, with thanks, from the annual RER-100 survey published by US-magazine RER (Rental Equipment Register) in May 2019.
- All revenues have been converted into € using exchange rates as at 31/12/18, as follows (exchange rates used in last year's survey are given in brackets):
 €1.00 = US\$1.146 (1.201)
 = UK£0.898 (0.888)
 = AU\$1.626 (1.538)
 = CA\$1.563 (1.510)
 = JPY125.683 (135.261)
 = ZAR16.479 (14.771)
 = SEK10.161 (9.816)
 = SG\$1.561 (1.602)
 = NOK9.913 (9.846)
 = BRL4.446 (3.971)
 = CNY7.879 (7.784)
 = NZ\$1.708 (1.686)

Rising to



With a number of new entrants from North America, IRN100 revenues in 2018 are up more than 10%. Thomas Allen reports

There have been some significant shifts in this year's IRN100 listing, reflecting a global rental industry that is very much in flux. Particularly notable is the entry of more than a dozen new companies in the top 100, the majority of which – nine to be precise – are North American. This is indicative of the strength of the North American rental market. The latest figures from the American Rental Association (ARA) suggest that

North American equipment rental revenue growth will continue to exceed economic growth over the next few years, forecasting that overall revenues will surpass US\$61.3 billion this year – representing a 5% increase compared to 2018.

In light of this, North American rental businesses are benefitting from investment. This seems to be true of Caterpillar since four of the new entrants to the top 100 are Caterpillar dealers: Kelly Tractor, Mustang Cat, Carolina Cat and Wagner Cat.

Taking the top 100 as a whole, the North American companies in the list grew on average by 20% in 2018, helped by a buoyant market and consolidation. Meanwhile, the Europeans grew on average by 7% – again due to overall market growth and consolidation, but less in both cases than in North America.

Growth in the European rental market also outstripped overall economic growth in 2017, with total revenues rising by about 3.7%. And that >

Products featured in the IRN100

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

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

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
1	United Rentals	7028	5285	Stamford, Connecticut, US	US, Canada	Construction equipment, tools	1165	18600	+001 (203) 622-3131 www.unitedrentals.com
2	Ashtead Group	4683	4075	London, UK	UK, US, Canada, Germany, Ireland	Construction equipment, tools	995	17166	+44 020 7726 9700 www.ashtead-group.com
3	Aktio Corp	2175	1845	Tokyo, Japan	Japan, Thailand, Singapore, Malaysia, Taiwan, Indonesia, Bangladesh and Myanmar	Construction equipment, tool hire, party/events	1010	8359	+81 3 6854 1413 www.aktio.co.jp/en/
4	Aggreko	1961	1947	Glasgow, UK	80 countries globally	Power, temperature control and compressor rental	204	6000	+44 141 225 5900 www.aggreko.com
5	Herc Rentals	1729	1750	Bonita Springs, Florida, US	US, Canada, China	Construction equipment, tools	270	4900	+1 239 301 1000 www.hercrentals.com

the top

Arcomet topped the growth league due to its acquisition of Matebat

TABLE 1

IRN100 Revenues

	2018 (currency adjusted)	2018 Revenues (€ billion)	2018 % change (adjusted)	2017 Revenues (€ billion)	2016 Revenues (€ billion)	2015 Revenues (€ billion)	2014 Revenues (€ billion)	2013 Revenues (€ billion)	2012 Revenues (€ billion)	2011 Revenues (€ billion)	2010 Revenues (€ billion)	2009 Revenues (€ billion)
TOP 5	€ 17.0bn	€ 17.6bn	+17.0%	€ 14.5bn	€ 13.7bn	€ 13.35bn	€ 10.87bn	€ 9.23bn	€ 8.38bn	€ 6.96bn	€ 5.30bn	€ 5.04bn
TOP 10	€ 22.3bn	€ 23.3bn	+16.2%	€ 19.2bn	€ 18.5bn	€ 18.1bn	€ 15.51bn	€ 13.01bn	€ 12.35bn	€ 11.44bn	€ 8.90bn	€ 8.07bn
TOP 50	€ 39.1bn	€ 40.5bn	+10.9%	€ 35.3bn	€ 34.5bn	€ 32.9bn	€ 29.30bn	€ 25.55bn	€ 25.43bn	€ 24.23bn	€ 20.20bn	€ 18.73bn
TOP 100	€ 46.1bn	€ 47.6bn	+10.6%	€ 41.7bn	€ 41.1bn	€ 39.7bn	€ 35.42bn	€ 31.70bn	€ 31.40bn	€ 29.43bn	€ 24.90bn	€ 23.20bn
TOTAL WORLD MARKET	€ 83.2bn ^(Est)			€ 79.2bn ^(Est)	€ 75bn ^(Est)	€ 73.5bn	€ 70bn	€ 70bn	€ 65bn	€ 60bn	€ 55bn	€ 55bn

RANK	COMPANY	TURNOVER (€ MILLION)	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
6 5	Loxam	1483 1368	Paris, France	France, Ireland, UK, Denmark, Spain, Germany, Belgium, Switzerland, Italy, Luxembourg, Norway, Portugal, Netherlands, Morocco, Middle East (Saudi Arabia, Bahrain, UAE, Kuwait, Oman, Qatar), Colombia, Brazil	Construction equipment, tools	760	7900	+33 1 58 440 400 www.loxam.com
7 8	Kanamoto	1346 1288	Sapporo, Japan	Japan, China, Hong Kong, Singapore, Indonesia, Thailand, Vietnam, Philippines, Malaysia	Construction equipment, tools	503	3135	+81 11 209 1600 www.kanamoto.co.jp
8 9	Nishio Rent All Co	1064 886	Osaka, Japan	Japan, Malaysia, Thailand, Singapore, Vietnam, Australia, China, Indonesia	Construction equipment, rools, party/events	416	3748	+81 6 6251 7302 www.nishio-rent.co.jp

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RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
9 7	Algeco Scotsman	955	912	Baltimore, Maryland, US	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia	Portable accommodation/storage units	239	5049	+1 410 931 6000 www.algeco.com
10 10	Nikken Corp	905	792	Tokyo, Japan	Japan, US, Thailand, UAE, Indonesia, Myanmar, Germany	Construction equipment	206	2331	+81 3 5512 7311 www.rental.co.jp/english
11 28	H&E Equipment Services	852	689	Baton Rouge, Louisiana, US	US	Construction equipment	97	2369	+1 225 298 5200 www.he-equipment.com
12 13	Home Depot Rentals	RER 821	715 RER	Atlanta, Georgia, US	US, Canada, Mexico	Construction equipment, tools	1358	2,500	+1 770 433 8211 www.homedepotrents.com
13 14	Maxim Crane	EST 786	666 RER	Bridgeville, PA, US	US	Cranes and aerial platforms	56	945	+1 412 504 0200 www.cranerental.com
14 11	Cramo	780	730	Helsinki, Finland	Finland, Sweden, Norway, Denmark, Germany, Austria, Hungary, Estonia, Lithuania, Poland, Czech Republic and Slovakia, Russia and Ukraine	Construction equipment, tools, modular	300	2753	+358 10 661 10 www.cramogroup.com
15 12	Ramirent	712	724	Helsinki, Finland	Finland, Sweden, Norway, Russia, Estonia, Latvia, Lithuania, Poland, Ukraine, Czech Republic, Slovakia	Construction equipment, tools, party/event	294	2890	+358 20 750 200 www.ramirent.com

TABLE 2

IRN100 Regional trends

CONTINENT	NUMBER OF COMPANIES											
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	
Europe	39	41	42	41	39	42	44	44	50	54	55	
N America	38	34	33	35	35	34	31	30	28	27	27	
Japan	10	10	9	10	10	10	10	11	11	11	12	
Australia	4	3	4	5	5	6	6	6	6	4	4	
South America	1	4	4	3	6	3	3	4	3	2	0	
Middle East	3	3	5	3	3	3	3	2	0	0	0	
Asia (inc China)	5	5	3	3	2	2	2	2	1	1	1	
Africa	0	0	0	0	0	0	1	1	1	1	1	



trend is expected to continue into the years ahead, with the latest figures from the European Rental Association (ERA) forecasting growth of 4.1% in 2019, followed by 4.7% in 2020.

The healthy market conditions in North America and Europe are reflected in the like-for-like 60% jump in total capital expenditure in Euros for 2018 to €10.1 billion, compared to the previous year. United Rentals' investment topped the charts at more than €1.8 billion, closely followed by Kanamoto's €1.7 billion investment and Ashtead's spending of €1.6 billion.

At the top of the IRN100 list, the leading ten positions continue to be held by the same companies as last year, but there has been some jostling. While United Rentals has maintained its position at the top of the table, with 2018 revenues of just over €7 billion, and Ashtead Group remains just below them, with revenues of almost €4.7 billion, third

Herc overtook Loxam, moving into fifth position this year

place has been stolen from Aggreko by Akito Corp. The Japanese company achieved revenues of close to €2.2 billion in 2018, up on the €1.8 billion seen in 2017 – although the increase was not quite so dramatic in like-for-like terms.

Loxam also had its position in fifth place last year taken by Rentals this year. The US-based company recorded revenues of over €1.7 billion in 2018.

Below Herc, two Japanese companies – Kanamoto and Nishio Rent All – overtook Algeco Scotsman, which has dropped to ninth place, just above Nikken Corp, which has maintained the same ranking as last year.

There was also plenty of movement in the rest of the table. Towards the top end, one of the biggest movers was WillScot – formerly Williams Scotsman – which climbed 14 ranks to 17th position. This rise in revenue was helped by the company's acquisition of US-based portable unit rental company ModSpace during the year, for a value of US\$1.1 billion (€940 million). ModSpace had recorded revenues of US\$453 million (€390 million) in 2017. The biggest upward mover of all was Arcomet, >

TABLE 3

IRN100 Drop-outs

COMPANY	REASON
BlueLine Rental	Acquired
Baker Corp	Acquired
Compact Power Equipment Rental	Acquired
ModSpace	Acquired
Hawk Plant Hire	Sold off after going into liquidation
Matebat	Merged with Arcomet

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
16 15	Kiloutou	690	607	Villeneuve d'Ascq, France	France, Poland, Spain, Germany, Italy	Construction equipment, tools, power, access, modular, party/events, temperature control	515	5000	+33 359 56 55 39 www.kiloutou.fr
17 31	WillScot Corp	656	425	Baltimore, US	US, Canada	Modular buildings	110		+1 800 782 1500 www.willscot.com
18 19	Ahern Rentals	618	510	Las Vegas, Nevada, US	US	Construction equipment	89	2336	+1 800 400 1610 www.ahern.com
19 18	Taiyo Kenki Rental	617	525	Shizuoka, Japan	Japan	Construction equipment	117	2385	+81 542 843 111 www.taiyokenki.co.jp
20 16	Coates Hire Ltd	602	597	Sydney, Australia	Australia	Construction equipment, tools	150	2400	+61 2 9701 3308 www.coateshire.com.au
21 17	Sarens	595	586	Wolvertem, Belgium	63 countries worldwide	Cranes	112	4543	+32 52 319 319 www.sarens.com
22 23	Boels Verhuur	579	445	Sittard, Netherlands	12 countries across Europe	Construction equipment, tools, party/events	425	4000	+31 (0)46 459 2159 www.boels.nl
23 21=	Sunstate Equipment Co	493	458	Phoenix, AZ, US	US	Construction equipment, tools	69	1830	+1 602 275 0601 www.sunstateequip.com
24 24	Mobile Mini Inc	487	444	Phoenix, AZ, US	US, Canada, UK, Netherlands	Portable storage & accommodation	159	2049	+1 480 894 6311 www.mobilemini.com
25 27	Zeppelin Rental	473	410	Garching (Munich), Germany	Germany, Austria, Czech Republic, Slovakia	Construction equipment, tools, party/events, logistics, temporary infrastructure	135	1500	+49 (0)89 32 000 220 www.zeppelin-rental.com
=26 26	Speedy Hire	420	418	Newton-le-Willows, UK	UK & Ireland, Middle east, North Africa	Construction equipment, tools, temperature control	206	3755	+44 1942720000 www.speedyservices.com
=26 29	Liebherr Mietpartner	420	391	Ludwigshafen, Germany	Germany, France, Austria, UK, Switzerland	Construction equipment	130	268	+33 680 889 822 www.liebherr.com
28 35	Mateco (equipment business unit of TVH Group)	410	335	Munsbach, Luxembourg	Belgium, Bulgaria, Czech Republic, Germany, Hungary, Luxembourg, Malaysia, Mexico, Moldavia, Netherlands, Poland, Romania, Slovakia, Spain and Switzerland	Construction equipment, aerial platforms, forklift trucks	130	2226	+32 56 43 42 11 www.tvh.com



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RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
=29 36	Hitachi Construction Machinery Japan	393	320	Saitama, Japan	Japan	Construction equipment, tools	288	2923	+81 (0) 48 933 5509 www.hitachi-kenki.co.jp
=29 30	HSS Hire	393	378	Mitcham, UK	UK/Ireland	Construction equipment, tools	250	2900	+44 20 82603100 www.hss.com/hire
31 33	HKL Baumaschinen	387	356	Hamburg, Germany	Germany, Austria, Poland	Construction equipment, tools	150	1300	+49 40 538020 www.hkl-baumaschinen.de
32 55	APR Energy	350	196 ^{EST}	Jacksonville, Florida, US	Global	Power	200		+1 32226 4780 www.aprenergy.com
=33 21=	AMECO	349	458	Greenville, SC, US	US, Canada, Mexico, Chile, Peru, Jamaica, Dominican Republic, Colombia, Australia, Philippines, Mozambique, Panama	Construction equipment	27	2042	+1 864 295 7800 www.ameco.com
=33 39	All Family of Companies	EST 349	296 ^{RER}	US	US	Cranes, construction equipment, specialised transport	37	1530	+1 800 232 4100 www.allcrane.com
35 34	VP PLC	339	281	Harrogate, UK	UK, Ireland, Germany, UAE, S America, Singapore, Australia, South America	Construction equipment, tools	300	3332	+44 (0)1423 533 400 www.vpplc.com

TABLE 4

IRN100 New entrants

RANK	COMPANY	REVENUES
66	Nesco Specialty Rentals	158
70	TESA (including CGT)	145
73	Kelly Tractor	139
77	Kirby Smith Machinery	122
82	Cross-country Infrastructure Services	116
85	GSV Materieludlejning	112
86	Cooper Equipment Rentals	110
87	Renta Group	108
88	Mustang CAT	107
90	Carolina CAT	102
=94	Sims Crane & Equipment Co	96
=97	Wagner CAT	92
=99	Andrews Sykes	88

which rose 36 positions to 62nd in the table. The French company roughly doubled its revenues compared to 2017 by acquiring fellow tower crane company Matebat, based in Belgium.



Shanghai Panguan Construction Equipment Rental Co made one of the next biggest jumps, moving up 25 places to fill the 43rd position. This improvement in revenues has been attributed to particularly high demand for tower cranes, which is the company's main business. The firm rents equipment solely in China.

A particularly notable acquisition in 2018 to draw attention to is United Rentals' purchase of one of its largest US competitors, BlueLine, from Platinum Equity. At a cost of \$2.1 billion (€1.87 billion), United Rentals' equipment rental capacity was expanded in many of the largest metropolitan areas in North America, including both US coasts, the Gulf South and Ontario. The company gained more than 46,000 rental assets, 114 branch locations and approximately 1,700 employees.

Top five

Taking a closer look at the companies leading the pack, it comes as no surprise that United Rentals

GSV Materieludlejning is a new entrant to this year's top 100, moving straight into 84th place

TABLE 5

IRN100 Growth league

COMPANY	% GROWTH
1 Arcomet	106%
2 Shanghai Horizon Equipment & Engineering	93%
3 Shanghai Panguan Construction Equipment Rental Co., Ltd	90%
4 Lou-Tec	66%
5 Emeco	63%
6 WillScot Corp	47%
7 Toromont Industries	45%
8 Warren Cat	43%
9 Boels Verhuur	30%
10 United Rentals	27%

Note: Year-on-year change in local currency.

has outpaced its nearest competitor by almost double. The US giant constituted 14.8% of the top 100 companies' rental revenues for 2018 – more than the 12% it constituted in 2017. The company also invested in excess of €1.8 billion in new fleet equipment, representing a like-for-like increase of 13.9% on capital expenditure in 2017 and allowing the company to maintain its position at the top of the capital expenditure league table.

In second position, Ashtead recorded revenues of almost €4.7 billion in 2018, representing 9.8% of the top 100's total revenues for the year. The UK-based rental company increased its spending on new equipment from just over €1 billion in 2017 to more than €1.6 billion in 2018. This wasn't quite enough to get second place on the capital expenditure league table though, since Kanamoto – seventh place in the IRN100 – clinched second position with spending of over €1.7 billion on new fleet equipment.

Third position in the IRN100 table is occupied by >

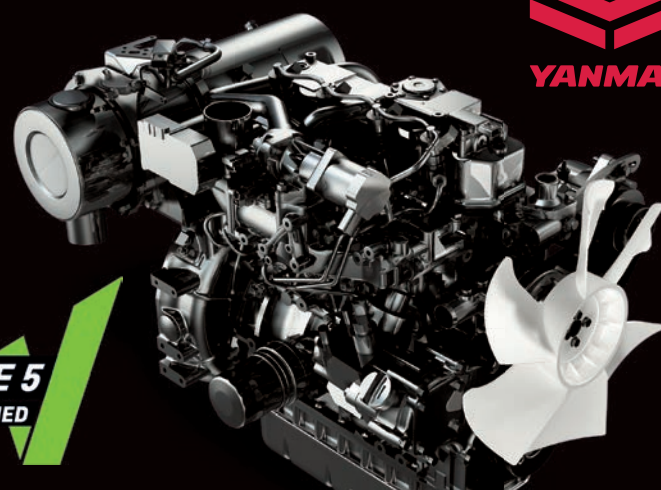
RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
36 59	Tat Hong	311	300	Singapore	Singapore, Malaysia, Thailand, Hong Kong, Vietnam, Indonesia, Myanmar, Papua New Guinea	Cranes, tower cranes, construction equipment			+65 67090300 www.tathong.com
37 37	Mediaco	305	305	Marseille, France	France, Germany, North Africa	Cranes, industrial services, logistic and transport	62	1498	+33 4 9103 8191 www.mediaco.fr
38 48	ADCO	EST 300	214 EST	Ratingen, Germany	30 countries worldwide	Portable toilets			+49 2102 8520 www.toitoidixi.de
39 32	Select Plant Hire	EST 290	371	Dartford, UK	UK, Australia, UAE	Construction equipment, tools, tower cranes			+44 (0)1322 296200 www.selectplanthire.com
40 44	McGrath Rentcorp	279	241	Livermore, California, US	US, Canada	Portable accommodation		1066	+1 925 606 9200 www.mgrc.com
41 43	TNT Crane & Rigging	274	244	Houston, US	US, Canada	Crane and rigging equipment	43	1700	+1 713 644 6113 www.tntcrane.com
42 41	Mammoet Holding BV	EST 265	262 EST	Schiedam, Netherlands	Worldwide	Crane rental	90	5200	+31 10 204 24 24 www.mammoet.com
43 42	Zahid Group	EST 260	260 EST	Jeddah, Saudi Arabia	Saudi Arabia	Construction equipment	25		+966 2 6671156 www.zahidcat.com
44 68	Shanghai Panguan Construction Equipment Rental Co., Ltd	256	128 EST	Shanghai, China	China, Malaysia, Philippines, Cambodia	Construction equipment	27	2,700	+86 21 321 800 88 www.panguan.com
45 49	Rent Corp	246	211	Shizuoka-shi, Japan	Japan, Thailand	Construction equipment	62	934	+81 54 265 2201 www.rent.co.jp
46 45	Xylem	EST 244	238 EST	Rye Brook, US	Worldwide	Pump rentals	56		www.xylem.com
=47 58	Toromont Industries	241	173	Concord, Vaughan, Canada	Canada	Construction equipment	146	6000	+1 416 667 5511 www.toromont.com
=47 46	Riwal	241	231	Dordrecht, Netherlands	Netherlands, Belgium, Denmark, Sweden, Norway, UK, Germany, France, Poland, Spain, Slovenia, Croatia, UAE, Qatar, India, Kazakhstan	Aerial platforms, power, telehandlers	75	2350	+31 88 618 1800 www.riwal.com
49 47	Kennards Hire	239	219	Sydney, Australia	Australia, New Zealand	Construction equipment, tools	174	1700	+61 2 880 56100 www.kennards.com.au



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RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
50	63 Emeco	234	152	Osborne Park, Australia	Australia, Indonesia, Chile	Heavy construction and mining equipment	500		+61 8 9420 0222 www.emecogroup.com
51	51 Lambertsson Sverige AB	227	203	Förlöv, Sweden	Sweden	Construction equipment			+46 431 89300 www.lambertsson.com
52	40 Atlas Copco Specialty Rental Div.	224	272	Boom, Belgium	153 countries worldwide	Compressors and generators			+1 281 454 2200 www.atlascopco.com/ rental
53	54 GAP Group Ltd	208	197	Glasgow, UK	UK	Construction equipment, tools	147	1600	+44 141 225 4600 www.gap-group.co.uk
54	65 Kyosei-Rentemu	204	150	Japan	Japan	Construction equipment, general rental	94	658	+81 155 33 1380 www.kyosei-rentemu.co.jp
=55	50 Caterpillar Japan (Nippon)	EST 200	208 EST	Tokyo, Japan	Japan	Construction equipment	173	2716	+81 (3) 5717 1121 www.nipponcat.co.jp
=55	56 NCSG	EST 200	191	Alberta, Canada	Canada, US	Crane rental	20	1080	+1-855-560-5050 www.ncsg.com

Loxam topped this year's EURO50 again



Aktio Corp this year. The Japanese company's rental revenues for 2018 came close to €2.2 billion, which accounts for 4.6% of the top 100's total revenues for 2018. The Japan-based company operates in Japan, Thailand, Singapore, Malaysia, Taiwan, Indonesia, Bangladesh and Myanmar.

Just below Aktio Corp is the big UK-based global player Aggreko, with revenues of almost €2 billion in 2018, which represents a 1.7% like-for-like rise on its revenues compared to the year before and constitutes 4.1% of total revenues for the top 100. The company invested €218 million in its fleet in 2018, which is a 21% like-for-like reduction compared to 2017, putting Aggreko in tenth place on the capital expenditure league table.

Having recorded revenues of more than €1.7 billion, Herc Rentals rose into fifth place on this year's table. However, the 2018 revenue was in fact 5.8% lower than last year's in like-for-like terms. The company spent €673 million on new fleet equipment last year – a 120% increase on spending in the year before. This put Herc Rentals in fifth place on the capital expenditure league table.

Growth league

Arcomet tops the growth league (Table 5), since – as mentioned – the French company more than doubled its revenues by acquiring Matebat. The company now has a total fleet of 2,200 cranes, 550 employees and 23 depots across eight countries. With this move, the firm intends to expand geographically and add to its fleet with passenger

hoists, formwork, electrical systems and other equipment.

Canada-based Lou-Tec, which moved up the top 100 list by 26 places, has been capturing growth in the North American rental market, increasing its revenues by 66% compared to 2017. In order to better respond to growing demand from contractors and builders of major structures in Quebec, the company merged the activities of twelve of its branches in Quebec, Montreal and Gatineau last year. As well as improving service to customers, this move was intended to improve operational efficiency, increase purchasing power and maximise utilisation rates.

Another company in the growth league worth mentioning is Emeco, which moved up 14 ranks into 49th place on the top 100 table. The Australia-based company acquired equipment rental business Matilda Equipment in 2018 for a value of AU\$80 million (€49.2 million). This was said to provide Emeco with a niche equipment rental business that allowed it to provide customers with an additional service offering. Emeco also exited the Canadian market last year.

European top 50

Since the IRN100 started life as a listing of the top 50 European rental companies, we also have a European-specific league table (Table 7), which is once again topped by Loxam. The French company's European revenue is virtually double that of its closest European competitor, Cramo. >

TABLE 6

IRN100 Capital expenditure Top 25 investors

COMPANY	GROSS CAPITAL EXPENDITURE 2018 (€ MILLION)
1 United Rentals	1839
2 Ashtead Group	1650
3 Herc Rentals	673
4 Aktio Corp	EST 430
5 Loxam	413
6 H&E Equipment Services	385
7 Kanamoto	337
8 Nishio Rent All Co	315
9 Cramo	306
10 Aggreko	218
11 Kiloutou	203
12 Ramirent	200
13 Zeppelin Rental	196
14 Hitachi Construction Machinery Japan	190
15 Shanghai Horizon Equipment & Engineering	171
16 Sarens	169
17 Mateco (equipment business unit of TVH Group)	160
18 Nikken Corp	143
19 Shanghai Panguan Construction Equipment Rental Co., Ltd	132
20 Finning International	131
21 WillScot Corp	113
22 HKL Baumaschinen	108
23 Ahern Rentals	103
24 TESA (including CGT)	96
25 Riwal	90
TOP 25 SPENDERS	(+39%) €8.8bn
TOP 25 (2017)	(-3%) €6.1bn
TOP 25 (2016)	(-12.1%) €6.3bn
TOP 25 (2015)	(-7.9%) €7.0bn
TOP 25 (2014)	(+26.7%) €7.6bn
TOP 25 (2013)	(-4.8%) €6.0bn
TOP 25 (2012)	(+10.5%) €6.3bn

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
57 82	Shanghai Horizon Equipment & Engineering	195	102	Shanghai, China	China	Construction equipment	62	1513	+86 400 821 8001 www.hongxinjianfa.com
58 57	Komatsu Rental	EST 190	189 EST	Yokohama, Japan	Japan	Construction equipment			+81 45 274 3337 www.komatsu-rental.co.jp
59 52	Carrier Rental Systems	EST 180	203 EST	Egham, Surrey, UK	UK, US, Germany, France, Holland, Poland, Singapore	Cooling equipment, pumps, generators, party/events		217	+44 (0)1372 220169 www.carrierrentalsystems.co.uk
60 25	Portakabin	179	181 EST	York, UK	UK, Ireland, Netherlands, Belgium, France	Accommodation rental, events		1497	+44 01904 611655 www.portakabin.co.uk
61 60	Ring Power	EST 175	167 RER	St Augustine, FL, US	US	Construction equipment	23	2000	+1 904 201 7400 www.ringpower.com
62 98	Arcomet	EST 165	80 EST	Paal, Belgium	Worldwide	Tower cranes	23	550	+32 11 450 950 www.arcomet.com
63 89=	Lou-Tec	RER 162	93 EST	Quebec, Canada	Canada	Construction equipment, aerial platforms, forklift trucks, power tools		80	www.loutec.com
64 61	Peinemann Holding B.V.	EST 160	162 EST	Hoogvliet, Netherlands	Netherlands, Belgium	Cranes, aerial platforms	10	300	+31 10 295 5000 www.peinemann.nl
65 NEW	Nesco Specialty Rentals	RER 158	175 RER	Bluffton, Indiana, US	North America	Construction equipment, tools		50	+1 800 252 0043 www.nescorentals.com
66 64	Finning International	153	151	Vancouver, Canada	Canada, UK, Ireland, Chile, Argentina, Bolivia	Construction equipment, power		13146	+1 604 691 6444 www.finning.com
67 83	Warren Cat	RER 150	101	Texas, US	US	Construction equipment, power		15	+1 866 288 4414 www.warrencat.com
68 70	Ohio Cat	EST 147	126 RER	Ohio, US	US	Construction equipment		11	+1 440 526 6200 www.ohiocat.com
69 NEW	TESA (including CGT)	145		Milan, Italy	Italy, Spain, Portugal	Construction equipment, tools, party/events, lifting, trucks		50 2800	www.linkedin.com/company/tesa-spa
70 71	Cleveland Brothers Equipment Co	RER 144	124	Murrysville, Pennsylvania, US	US	Construction equipment	22	1300	+1 866 551 4602 www.clevelandbrothers.com
71 72	Holt Cat	EST 140	123 EST	San Antonio, Texas, US	US	Construction equipment		26	+1 855 465 8228 www.holtcat.com



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Services based-model

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
72 NEW	Kelly Tractor	RER 139	115 RER	Miami, Florida, US	US	Construction equipment, tools	14	415	+1 305 592 5360 www.kellytractor.com
=73 67	Red-D-Arc Welderentals	EST 135	129 EST	Grimsby, Canada	US, Canada, Mexico, UK, Netherlands, France, Germany, UAE	Welding/power.	85	99	+1 905 643 4212 www.red-d-arc.com
=73 77	SoEnergy International	EST 135	112 EST	Miami, Florida, US	Latin America, Middle East, Africa	Power rentals	1000		+1 305 715 7308 www.soenergy.com

TABLE 7

IRN EURO50 European rental revenues 2019

RANK 19 18	COMPANY	2018 REVENUES (€M)
1 1	Loxam	1439
2 2	Cramo	780
3 3	Ramirent	712
4 4	Algeco Scotsman	700 EST
5 5	Kiloutou	690
6 6	Boels Verhuur	579
7 9	A-Plant	525
8 10	Zeppelin Rental	473
=9 12	Speedy Hire	420
=9 11	Liebherr Mietpartner	420
11 16	Mateco (equipment business unit of TVH Group)	410
12 13	HSS Hire	393
=13 8	Sarens	387 EST
=13 15	HKL Baumaschinen	387
15 19	VP PLC	339
16 18	Mediaco	305
17 14	Select Plant Hire	290
18 17	Aggreko	285
19 21	Lambertsson Sverige AB	227
20 22	GAP Group Ltd	208
21 24	Riwal	184
22 7	Portakabin	179
23 =39	Arcomet	165
24 25	Peinemann Holding B.V.	160
25 23	ADCO	150 EST
26 26	TESA (including CGT)	145
27 31	General de Alquiler de Maquinaria (GAM)	132
28 20	Mammoet Holding BV	130 EST
=29 28	Nordic Crane	120
=29 29	Losberger De Boer	120
31 27	Ainscough Crane Hire Ltd	118
32 -	GSV Materieludlejning	112
33	Atlas Copco Specialty Rental Div.	110
34 -	Renta Group	108
35 33	Prangl Gesellschaft M.B.H.	104
36 35	Utleiecompagniet AS (UCO)	101
37 34	Energyst BV	100
38 30	Jewson Tool Hire	95
39 32	Carrier Rental Systems	90 EST
40 -	Andrews Sykes	88
41 41	Salti	87
42 =37	Pekkaniska Group	83
43 =37	Foselev	80
44 -	Stavdal (now owned by Ramirent)	79
45 -	CW Plant Hire (Charles Wilcon Engineers)	71
46 -	Morris Leslie Plant Hire	70
47 44	Nixon Hire	68
48 46	Ardent	65
49 42	Mobile Mini	64
50 45	Acces Industrie	60
	TOTAL (€billion)	€13.2bn

Loxam bought Haulotte's Italian rental subsidiary Nove in the middle of last year. The acquisition added to Loxam's Nacanco business that it had bought the previous year with six new locations and 45 employees. It's worth mentioning that Loxam also recently strengthened its position in the UK's powered access market with the acquisition of UK Platforms from HSS Hire Group in January 2019.

Loxam operates in multiple European countries, such as France, the UK, the Netherlands, Denmark, Italy, Germany and Spain, as well as further afield in the Middle East.

In second place on the European table – and 14th position in the top 100 listing – Cramo recorded European revenues of €780 million, which represents a 6.7% increase on its revenues the year before. The company is continuing to execute its Shape & Share strategy (read more about this in the interview published in this issue), and in line with this strategy it bought Sweden-based Nordic Modular Group in 2018. The acquisition, worth €263 million, was said to strengthen Cramo's Modular Space business and allow the company to explore strategic alternatives for that business area.

Ramirent is once again in third place on the European table, with revenues of €712 million. The Finnish company has been restructuring in order to better focus on its core business of equipment rental and related services, and re-invest capital where higher returns can be achieved. Ramirent divested its Temporary Space business in November 2018, and in December it sold its Danish equipment rental business to GSV Materieludlejning for a total of €33 million.



A-Plant ranked seventh in the EURO50, while its parent company Ashtead ranked second in the top 100

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
75 80	General de Alquiler de Maquinaria (GAM)	132	106	Oviedo, Spain	Spain, Portugal, Morocco, Poland, Saudi Arabia, Mexico, Brazil, Chile, Peru, Panama, Colombia, Dominican Republic	Lifting, energy, industry, manipulation	75	1100	+34 902 230 022 www.gamrentals.com
76 NEW	Kirby Smith Machinery	RER 122	90 RER	Oklahoma City, Oklahoma, US	US	Construction equipment	11	516	+1 73127-6590 www.kirby-smith.com
=77 73	Nordic Crane	EST 120	122 EST	Halden, Norway	No, Sw, Fi, Dk	Cranes	50	600	+47 69 21 70 70 www.nordiccranegroup.com
=77 75=	Losberger De Boer	120	114	Bad Rappenau, Germany	German, Netherlands, France, UK, Belgium, Spain, Italy, Qatar, UAE, US, China	Party/events, marquees, modular space	18	1000	+49 7066 9800 www.losbergerdeboer.com
=77 74	Byrne Equipment Rental	120	118 EST	Dubai, UAE	UAE, Oman, Qatar, Saudi Arabia	Construction equipment, party/events, oil and gas onshore and offshore	20	1500	+971 4 4544800 www.byrenrental.com
80 69	Ainscough Crane Hire Ltd	118	127	Wigan, UK	UK	Cranes	30	933	+44 (0)800 272 637 www.ainscough.co.uk
81 NEW	Cross-country Infrastructure Services	RER 116		Aurora, Colorado, US	US, Canada	Construction equipment, tools	20		+1 855 955 2247 www.crosscountryis.com
82 81	Equipment Depot	EST 114	104	Texas, US	North America	Construction equipment, access equipment	34	300	(+1)713 365 2547 www.eqdepot.com
83 86	Boom Logistics	113	98	Melbourne, Australia	Australia	Cranes, aerial platforms	20	810	+61 3 92072500 www.boomlogistics.com.au
84 NEW	GSV Materieludlejning	112		Hedehusene, Denmark	Denmark	Construction equipment, access equipment, modular	16		+45 70 12 13 15 www.gsv.dk
=85 75=	AJ Networks	EST 110	114	Seoul, South Korea	Korea, Vietnam, Saudi Arabia	Construction equipment, access equipment	57	508	+82 2 63639999 www.ajrental.com
=85 NEW	Cooper Equipment Rentals	RER 110		Mississauga, Ontario, Canada	Canada	Construction equipment, tools	41	500	+1 800 315 2667 www.cooperequipment.ca

A World Of Services

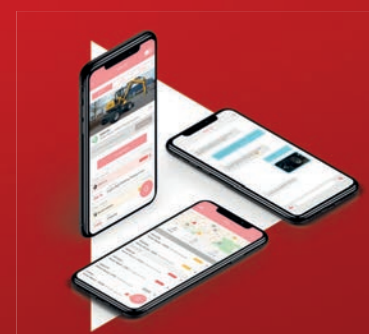
Collaboration is at the core of our strategy. To reach our goal, we connect the entire industry - from operator to OEM. That's why we've built a world of services that connects every stakeholder.



Trackunit On



Trackunit Manager



Trackunit Go

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
87 NEW	Renta Group	108		Vantaa, Finland	Finland, Sweden, Norway	Construction equipment, tools, party/events, scaffolding, modular, site services	60	532	+358 40 511 6445 www.renta.com
88 NEW	Mustang CAT	RER 107		Houston, Texas, US	US	Construction equipment	11		+1 800 256 1001 www.mustangcat.com
89 84=	Prangl Gesellschaft M.B.H.	104	100	Vienna, Austria	Europe	Cranes, aerial platforms	16	668	+43 (0)5 0995 www.prangl.at
90 NEW	Carolina CAT	RER 102		Charlotte, North Carolina, US	US	Construction equipment	25		+1 704 596 6700 www.catrentalstore.com/ carolina/en_US/home.html
91 88	Utleiecompagniet AS (UCO)	101	94	Kjeller, Norway	Norway	Construction equipment, tools, cranes	18	245	+47 64 83 61 30 www.uco.no
=92 84=	Rental Solutions & Services (RSS)	EST 100	100 EST	Dubai, UAE	Middle East, Pakistan, Africa, Cyprus.	Power. Temp control		100	+971 4 8849699 www.rss.ae
=92 87	Energyst BV	EST 100	EST 95	Breda, Netherlands	Europe, South Africa, Chile, Argentina, Panama, UAE	Power, temperature control	20	236	+31 765438500 www.energyst.com
=94 89=	Korearental Corp	96	93	Seoul, Korea	South Korea, Middle East, Vietnam	Construction equipment, modular, access equipment	10	147	www.korearental.co.kr
=94 NEW	Sims Crane & Equipment Co	EST 96		Tampa, Florida, US	US	Cranes, access equipment, forklifts	13		+1 813 626 8102 www.sims Crane.com
96 79	Jewson Tool Hire	EST 95	107 EST	Coventry, UK	UK	Tool hire		9148	+44 8001976848 www.jewson.co.uk/tool-hire
=97 95	Briggs Equipment	EST 92	82	Dallas, TX, US	US	Construction equipment, tools, access equipment	28	600	+1 214 630 0808 www.briggsequipment.com
=97 NEW	Wagner CAT	EST 92	100 EST	Aurora, Colorado, US	US	Construction equipment, tools	22		+1 877 654 1237 www.wagnerequipment.com/wagnerrents/

TABLE 8

IRN100 Top 10 'Global' players

RANK	COMPANY	REVENUES (€ MILLION)	NOTES
1	Ashtead Group	4683	UK, US, Canada, Germany, Ireland
2	Aggreko	1961	80 countries globally
3	Herc Rentals	1729	US, Canada, China
4	Loxam	1483	France, Ireland, UK, Denmark, Germany, Spain, Belgium, Switzerland, Luxembourg, Morocco, Portugal, Italy, Netherlands, Norway, Middle East (Saudi Arabia, Bahrain, UAE, Kuwait, Oman, Qatar), Colombia, Brazil
5	Algeco Scotsman	955	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia
6	Nikken Corp	905	Japan, US, Thailand, UAE, Indonesia, Myanmar, Germany
7	Sarens	595	63 countries worldwide
8	AMECO	349	US, Canada, Mexico, Chile, Peru, Jamaica, Dominican Republic, Colombia, Australia, Philippines, Mozambique, Panama
9	VP PLC	339	UK, Ireland, Germany, UAE, S America, Singapore, Australia, South America
10	ADCO	300	30 countries worldwide

Note: 'Global' defined as companies with rental activities in more than one continent

With revenues of €690 million, French firm Kiloutou is in fifth place on the European table this year. The company acquired four rental companies over the course of 2018. One example is Spain-based Seralfé, with its fleet of more than 1,600 units, which helped to consolidate Kiloutou's presence in the country having previously bought Rentecnika in 2015, Alvecon in 2016 and CTC Maquinaria in 2017. Another example is the acquisition of Butsch & Meier, a mid-size aerial platform rental specialist in Germany, which had a fleet of about 470 units.

New entrants

It has already been mentioned that a high proportion of the new entrants to this year's top 100 are North American – a number of them Caterpillar dealers – and indeed at the top of that list is US-based Nesco Specialty Rentals. The company changed its name during 2018 from Nesco Rentals to Nesco Specialty Rentals, to reflect its specialised operations. The company provides equipment for the transmission and distribution markets, and has been increasingly investing in the specialised assets needed to support the telecom, rail and other markets. During the year, the company acquired N&L Line Equipment, a manufacturer of products

RANK 19 18	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		18/17	17/16				DEPOTS	STAFF	
=99 92	SK Rental Group	88	88	Santiago, Chile	Chile, Peru, Brazil, Colombia, Bolivia	Construction equipment	21	500	+56 2 837 3500 www.skrental.com
=99 NEW	Andrews Sykes	88		Wolverhampton, UK	UK, Ireland, Netherlands, Belgium, Luxembourg, France, Italy, Switzerland, Middle East, Brazil, Central African Republic	Temperature control, pumps	60		+44 (0) 800 211 611 www.andrews-sykes.com

related to the live-line maintenance of electric utility lines.

Of the new entrants, it is also worth drawing attention to GSV Materieludlejning, which moved into 84th place on the top 100 table. As mentioned, the company bought Ramirent's Danish equipment rental business towards the end of 2018 for €33 million. Ramirent Denmark reported revenues of €41 million in 2017, and this acquisition was said to reinforce GSV Materieludlejning's status as the largest equipment rental business in Denmark, with 16 locations across the country and revenue of €112 million in 2018.


Near misses

There are ten companies that haven't quite made it into the top 100 this year. Just shy of the €88 million revenues recorded by Andrews Sykes, which made it to 100th place in the top 100, Salti's revenues came to €87 million for the year, meaning the company was knocked from 100th place in last year's top 100. Salti, based in France, spent just over €36 million on new fleet equipment last year. It rents construction equipment, tools, and party and events equipment.

Also, new additions to the near misses this year include – unsurprisingly – Caterpillar dealers MacAllister Cat, with revenues of €83 million, and

Further analysis to come

The IRN100 Extended Toplist – a more detailed look at this year's IRN100 survey– will be available in the coming months from the KHL.com Information Store. This stand-alone, extended version of the table will not only include data on company revenues, fleet investment and industry consolidation, but also new commentary on each of the companies in the IRN100, as well as extra graphs analysing the trends. The idea is to provide additional background context on the companies in the table, delving deeper into the reasons as to how and why they got to their position in the ranking. The additional graphs and charts also make it easier to interpret the data, offering a great visual representation of the trends in the industry.

 A video featuring editor Thomas Allen analysing this year's table will also be available soon on www.khl.com

Blanchard Cat, with revenues of €74 million.

Resilience

The optimism in the global rental market is clear to see. The North American market is bullish, while the European market – although not quite so bullish – continues to show robust growth. Certain regions in Asia are also doing well, demonstrated by Japanese companies moving up the IRN100 ranks for instance, and while South American companies did suffer in the rankings the market continues to show signs of recovery.

With this growth, the companies that make up the rental industry are morphing. Consolidation

means that big players are getting bigger through acquisitions, and they are also diversifying their fleets and putting greater focus on specialty rental and services. It is interesting to note that the bottom 50 companies have grown more slowly – at an average rate of around 8% – than the top 50, due to the lower impact of consolidation.

Although the question remains – in North America in particular – how long the boom can continue and when the next downturn will come, it would seem that big rental companies are increasingly prepared for such a downturn since the diversification of their offering makes them more resilient to the vicissitudes of the market. **IRN**

IRN100 Near misses

RANK	COMPANY	2017 REVENUES (€M)	LOCATION	TYPE OF RENTAL	CONTACT DETAILS
101	Salti	87	Marcq en Baroeul, France	Construction equipment, tool hire, parties/events, electric power, aerial platforms	www.salti.fr
=102	Pekkaniska Group	83	Vantaa, Finland	Aerial platforms and cranes	www.pekkaniska.com
=102	MacAllister CAT	83	Indianapolis, Indiana, US	Construction equipment	www.macallister.com
104	Foselev	80	Aix-en-Provence, France	Cranes, portable accommodation, aerial platforms	www.foselev.com
105	Stavdal (now owned by Ramirent)	79			
=106	Skyworks	78	Buffalo, New York, US	Construction equipment	www.skyworkslc.com
=106	Stephenson's Rental Services	78	Mississauga, Ontario, Canada	Construction equipment, tools	www.stephensons.ca
=108	Blanchard CAT	74	South Carolina, US	Construction equipment	www.blanchardmachinery.com
=108	Ferreyros	74	Lima, Peru	Construction equipment, tools	www.ferreyros.com.pe
110	Worldwide Group	71	Denver, Colorado, US	Construction equipment	www.wwmach.com

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The emergence of electric and hybrid-powered booms and vehicle mounts was a major theme at Bauma.

Euan Youdale, editor of sister publication Access International, reports

New powers

Anyone who visited Bauma in April will have noted that electric and hybrid-powered equipment was the talk of the showground.

Electric power is not new to access equipment, of course. Slab scissors and tracked platforms are two longstanding examples, with the latter particularly adopting the lithium-ion battery in greater numbers. It's the move to electric and hybrid rough terrain booms, and scissors, that is forging a new era in the powered access sector, with lithium playing a large role in these products types too.

Although, it's not all about lithium. Manitou launched its electric and hybrid range at Bauma, the Oxygen line, which includes a new aerial platform and two telehandler models.

The ATJ 200 e Oxygen is the group's first electric boom and is powered by lead acid batteries. With a working height of up to 20m and a maximum capacity of 230kg, the model provides the same performance as a diesel-powered version.

Francois Desbriere, Head of Aerial Platform Segment at Manitou, said it had taken nearly two years to develop the new technology in line with the company's existing products. The ATJ 200 e uses the company's existing axle, with a new AC motor inside the chassis that powers all wheels in constant four-wheel drive mode, and two-wheel steer.

Rather than lithium, Manitou chose lead acid batteries. There are two 24V battery packs, meaning it does not rise above the 70V threshold, allowing technicians to work on it without special certification.



JLG launched the Lithium-powered 340AJ, 450AJ and 520AJ at Bauma

It can achieve up to one working day on full charge in adverse weather conditions.

The full-electric machine will be available by the end of 2019 and a hybrid version will be in production in 2020. And the plan is to extend the range.

The company also launched the MRT 2550 h Oxygen Lab telehandler – a hybrid prototype version of the diesel MRT 2550 model – and the compact full-electric MT 625 e Oxygen concept telehandler.

Making promises

Haulotte notably made a promise at Intermat last year that all new models of booms would be electric-powered. The new Pulseo generation of booms does offer a combustion engine to recharge the battery in exceptional circumstances when the battery runs down but is essentially designed to be electrically powered. The manufacturer is looking to expand its electric offering outside of the European core markets, and last year opened new locations in Beijing and Guangzhou, and plans an office in Wuhan in 2019, to add to its existing Shanghai head office and manufacturing plant in Changzhou.

JLG has taken a different tack with its new all-electric AJ boom range, available in three models – 340AJ, 450AJ and 520AJ – offering working heights from 12m to 18m. They are equipped with lithium batteries and two-wheel drive as standard. Barrie Lindsay, Director of Engineering in Leicester, UK, says, "Battery development has improved throughout the years, and faster and opportune

The SL26E Speed Level



charging is a reality. For JLG it is imperative there should be no performance reduction in uptime, duty cycles or terrain ability."

Partnership

At Bauma, it was also announced that Dana and JLG had partnered as part of JLG's electrification initiative. The Spicer Electrified e-Axle has a combination of electrified drive components that reduces power losses by up to 20%, compared with traditional diesel-powered drivetrains.

It includes a range of Dana's brands, including Spicer axle components and drive and motion intelligence, SME motor and control technologies, and gearing that can be fine-tuned depending on vehicle size and performance.

Snorkel also showed a preview of its first-ever lithium-ion powered lift at Bauma, in the form of a new zero-emissions Speed Level. The SL26E has a 17kWh Hyperdrive lithium-ion battery pack with an integrated battery management system (BMS), and delivers extended duty cycles for longer, continuous operation on the jobsite. The manufacturer also launched a new generation of electric slab scissor lifts. The first is the S3019E, which has electric drive and electric steer, so there are no hydraulic hoses. >

The Z-45 FE boom from Genie



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ACCESS

Chinese manufacturers are also seeing the benefits of lithium. For example, Sinoboom is moving towards a greater range of electric equipment too. The company says it will offer a lithium option across its whole range of slab scissors. Next up will be a rough terrain scissor, with electric drive powered by lithium or lead acid batteries as options.

There is no doubt that full-electric access equipment represents the future. While we are heading in that direction, however, rental companies require rough terrain booms that can be used right now.

Genie's growing hybrid line is designed to do just that. Visitors to Bauma saw the second instalment of the FE range, represented by the 15.92m working height articulating Z-45 FE hybrid.

Designed using the same technology as its bigger sister, the Z-60 FE, formerly known as Z-60/37 FE, the new Genie Z-45 FE has a maximum outreach of 6.94m, a maximum up-and-over reach of 7.5m and 300kg lift capacity.

The Z-45 FE is designed to combine the performance of typical 4WD diesel machines with the benefits of 100% electric powered units and has an active oscillating axle. In all-electric mode, it provides the ability to work a full shift on a single battery charge. In hybrid mode, it offers more than a week of run time on a single tank of diesel.

In hybrid mode, the Z-45 FE boom lift uses a Stage V/Tier 4 engine-powered generator to maintain battery charge. It also uses braking energy to recharge its batteries.

Truck mounts

Truck mounts are also increasingly moving into the world of hybrid and complete electric power. Ruthmann showed the first hybrid in its premium brand Steiger range at Bauma, the TB 270 Hybrid.

Coupled with the company's first full-electric compact Steiger, the Ampero TBR 250 E, it says it is responding to the growing demand for truck mounts with alternative, emission-free drive types. It now joins the Ecoline 160 and 180 Hybrid models from the manufacturer's lower cost range.

The 27m working height TB 270 Hybrid has a lithium battery installed alongside the chassis combustion engine. To compensate for the weight of the battery pack, the TB 270 Hybrid is installed on a 3.5 tonne Mercedes Sprinter chassis with GRP-RA suspension and a 45 litre tank.

Last year Palfinger presented its first electrically operated access platform. The 37m working height P 370 KS E is driven on a standard truck but it combines a diesel drive system with an electric drive. It has a maximum cage load of 500kg at 31.5m.



The 37m working height Palfinger P 370 KS E



The Ruthmann Steiger TB 270 Hybrid

Following Multitel Pagliero's previous 160 Alu Hybrid and MT162 Hybrid launches, it has extended its range with the new MT204 Hybrid. The platform is powered by an on-board battery pack and is based on the Multitel MT162 Hybrid, and in this case the new 20m model offers 12m outreach. It has a 200kg cage load and 9.9m outreach, with 300kg cage load.

An area of real potential for 100% electric equipment lies in utility platforms mounted on small vehicles, such as van mounts. At Bauma, Versalift showed its 100% electric vehicle lift, incorporating its existing VTL-120 platform mounted on a full-electric Renault Master van. It has a working height of 11.7m and a basket capacity of 120kg. The vehicle has a range of 100km loaded to its maximum capacity.

The 100% electric lift is powered by a lithium-ion battery and is available with either a small, 2.5kWh or big, 5kWh power pack. The small battery can perform 20 to 30 cycles, while the larger can provide 40 to 60 cycles. Versalift can also offer 100% electric lifts with its VDTL-38-140 or VTL-37-135 platforms mounted on the Renault Master.

France Elevateur has been powering booms with battery packs for years but has recently launched the 17m working height 172CPL. It uses a 7.2 tonne Evenco van, powered by LPG. It has one-tonne payload with two people in the basket and a 10m outreach, in this configuration.

The company also offers its 121FCCE. This 6.5m working height on a cutaway van is fully electric, using the latest generation of lithium-ion batteries.

France-based Klubb has had a full-electric lift mounted on a cutaway Nissan eNV200 van, with a working height of 10m and outreach of 5m, which the company says is exceptional for its size. **IRN**

The electric Versalift VTL-31-120 on Renault



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The 14th ERA Convention was attended by 330 people

Delegates at the 2019 ERA Convention in Madrid heard from experts in sustainability and the circular economy, as well as the bankers' view of the industry. IRN reports

Circular argument



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The need to transition from a linear economy to a circular one is increasingly urgent, and the sharing economy has an important role to play in achieving that, which meant the theme for the 2019 Convention - 'Rental: A Sharing Economy' - was well-timed. But what is the sharing economy, and where does rental stand within it?

It can be difficult to define because it is associated equally with small start-ups and dominating global companies such as Airbnb and Uber. In his opening speech to the 330 delegates in Madrid, Pierre Boels, President of the ERA and CEO of Boels Rental, cited a definition as the sharing of assets that have untapped or unused capacity.

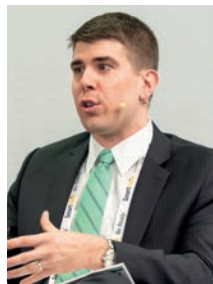
"Rental is at the origin of the sharing economy because it is based on sharing equipment", said Boels. He added that key differences with other players in the sharing economy included the fact that rental companies employ staff, own and maintain their own equipment, and - he joked - pay taxes.

An economist's view of the subject came from Marieke Blom, Chief Economist at ING bank in the Netherlands, who argued that the sharing economy was a route towards wider economic sustainability, and highlighted the role that a 'products as a service' business model can have in combination with circular economy businesses.

She asked, however, "if it is such a great business model, why don't we have a circular economy?...We have great difficulty in finding companies who operate a circular model."

Her answer was that resource prices remain low, while the costs of

Garrison Taylor, VP Industrials Sector at Crédit Agricole CIB



recycling and re-using are high; "It takes a lot of labour to recycle or re-use. If we don't acknowledge this, we will be looking for environmental business models that don't exist."

Reporting on mixed messages from consumers - who in some surveys have not valued environmental impact highly in their own personal transactions - she argued that industries like the rental sector will need to find compelling business arguments for sharing and circular economy models, allied to favourable government policies on tax, subsidies, and education programmes.

The ERA has been working behind the scenes to provide rental companies with tools that exploit the benefits of rental activity in terms of reduced carbon footprint. The convention heard representatives from Carbon Neutral Group and consultants CE Delft and SGS Search on their ongoing study - see the news in this issue.

Although still to be completed, the study seemed to highlight the need for rental companies to operate efficiently - especially in terms of transport - if they are to claim carbon reduction benefits. The report is due to be published on 15 June.

Investors and 'Rental 2.0'

Another aspect of the rental business - its attractiveness to investors - was the topic for three senior bankers from Crédit Agricole CIB, who argued that analysts and investors in the US have not fully taken on board the changes that the biggest rental companies in the US have gone through since the recession.

Pietro Sibille, Todor Todorovski and Garrison Taylor, speaking on the first day of the convention, said that diversification of customers, the potential to increase rental penetration, the new focus on higher margin 'specialty' rentals, as well as opportunities relating to digitalisation, had forged a new type of 'Rental 2.0' business, with greater resilience to future recessions.

Their view was that some investors still looked at the business through a Rental 1.0 prism, and that they were

"hyper-focused" on selling shares before the next recession, despite evidence that the current cycle still had a lot of room to run.

"We believe there is a gap between what the companies are telegraphing to the world, with what the investors believe to be important", said Todorovski. "Investors need to evolve with the business model", added Garrison Taylor.

However, their message had a sting in the tail. "It will take a downturn - will rental perform better than through the last downturn? - to validate the new Rental 2.0 model", said Taylor.

Next's year's convention will be on 10 and 11 June, 2020 in Maastricht, the Netherlands, during the International Rental Exhibition (IRE) and APEX shows (both between 9 and 11 June). **IRN**



Marieke Blom, chief economist, ING.

New ERA board

The new ERA board was elected on the second day of the convention, with Pierre Boels remaining as President, supported by six ERA vice-presidents. They are, from left: Stephane Henon (Managing Director, Loxam), Armin Rappen (CEO, mateco Holding), Leif Gustafsson (President & CEO, Cramo), Pierre Boels (CEO, Boels Rental), Xavier du Boÿs (Chairman, Kiloutou), Pierre-Nicola Fovini (Chairman, CGT Edilizia) and Juergen Kuespert (CEO, bbi).



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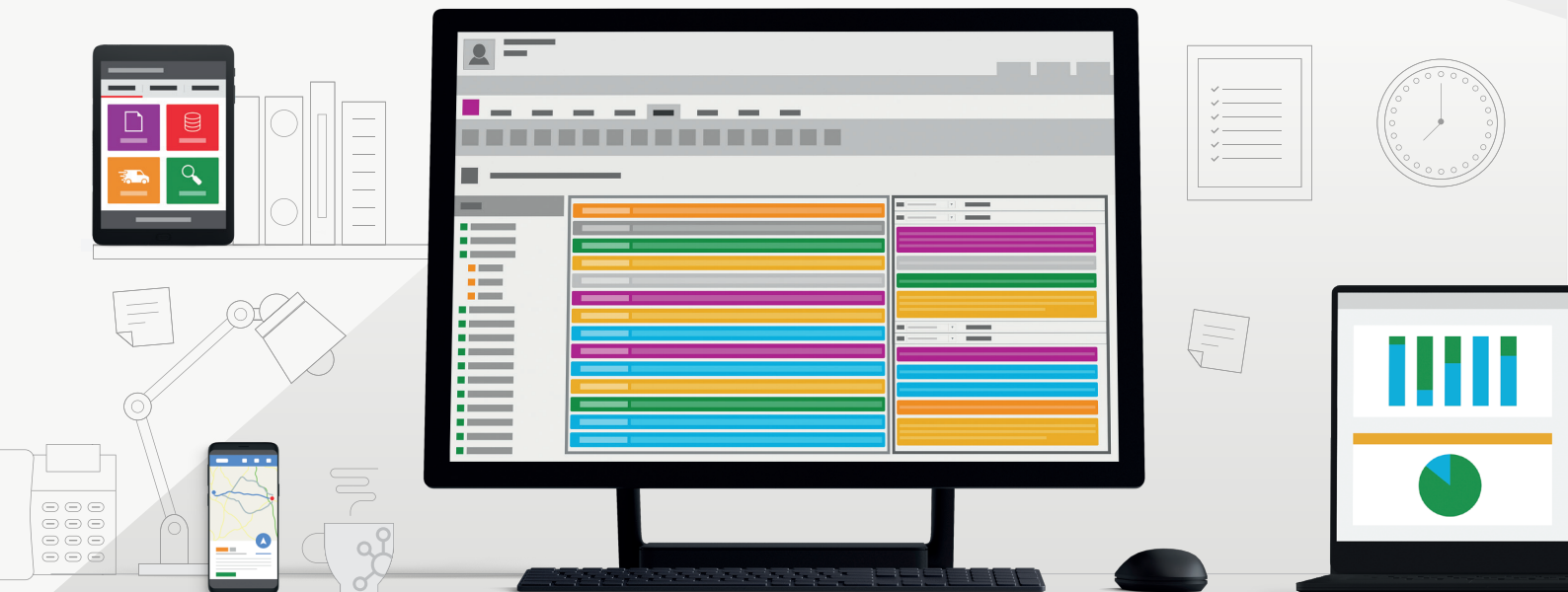
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The winners of this year's European Rental Awards were announced at a dinner during the ERA Convention in Madrid, Spain, in May. *IRN* congratulates the winners

And the winners are...

Bredenoord, Haulotte, Volvo CE and Germans Homs were among the winners at the 2019 European Rental Awards, held in Madrid on 15 May.

France-based Haulotte had special reason to celebrate at this year's awards ceremony, winning product of the year for the first of its Pulseo electric machines, the HA20 LE articulating

boom, and seeing its founder and CEO, Pierre Saubot, honoured with the lifetime achievement award.

More than 280 industry delegates attended the awards at the Meliá Castilla hotel in Madrid during the European Rental Association's (ERA's) annual convention. The awards are jointly organised by the ERA and *International Rental News (IRN)* magazine,

and this year's event was hosted by journalist and presenter Alex Taylor.

IRN would like to thank all of the companies that entered the 2019 awards. **IRN**

Large Rental Company of the Year (revenues over €15 million)

WINNER:

Bredenoord

What the judges said:

"Bredenoord is to be congratulated not only for its continuing growth, but for leading the way in developing innovative battery-powered rental solutions."

SHORTLIST: A-Plant, Mollo Noleggio

Left: Carsten Köhler, Bredenoord;
Middle left: Karel Huijser, JLG;
Middle right: Toon Bruining, Bredenoord;
Right: Albert Hulsebosch, Bredenoord



Left: Vicenz Homs, Germans Homs
Right: Patrick Stellweg, Ammann

Rental Product of the Year

WINNER:

Haulotte

What the judges said:

"The HA20 LE is a very strong product, and as the first of Haulotte's all-electric Pulseo range, it makes a strong statement on electrification and sustainability."

SHORTLIST: AJC Trailers (H2O Solar Pod – HIGHLY RECOMMENDED), Caterpillar (301.8 mini excavator), Hilti (TE 2000-AVR demolition hammer), JCB (19C 1E mini excavator), Manitou (100VR aerial platform)



Left: Martin Sas, Camso
Right: Patrick Murriss, Haulotte

Small Rental Company of the Year (revenues under €15 million)

WINNER:

Germans Homs

What the judges said:

"Germans Homs has been performing strongly and is an innovative company. In 2018 it continued to develop its online rental offering."

SHORTLIST: Arlift, Dromad Hire



Lifetime Achievement Award

WINNER:
Pierre Saubot, Founder and former CEO, Haulotte

What the judges said:
 "We are delighted to pay tribute to a pioneer in manufacturing. He has led Haulotte throughout its 32-year history, which has been a story of enduring success, and he has been heavily involved in efforts to professionalise the access industry."

Left: Pierre Saubot, Haulotte; Right: Pierre Boels, ERA President and CEO of Boels Rental



Left: Martin Sebestyen, chair of ERA's Technical Committee and head of rental and fleet management at Zeppelin Rental; Middle: Darren Fitch, Volvo CE; Right: Stephane Tournut, Volvo CE

ERA Technical Committee Award

WINNER:
Volvo CE

The ERA's Technical Committee said, "Volvo has demonstrated a continuous commitment to the satisfaction of the needs and requirements of the European rental industry. We are very pleased to recognise their involvement by giving them the ERA Technical Committee Award."



Rental Person of the Year

WINNER:
Dan Vorsholt CEO, GSV Materieludlejning

What the judges said:
 "Dan Vorsholt is the leader of what is now the largest rental business in its home country. GSV Materieludlejning has a reputation as a top-class rental company in a fiercely competitive market. Vorsholt was responsible for a key acquisition at the end of 2018, which saw the company significantly increase its size and become the biggest rental business in Denmark."



Left: Andy Zuckerman, Perkins Right: Dan Vorsholt, GSV Materieludlejning

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Left: Gérard Deprez, Loxam
Middle: Nicolas Jonville, Loxam
Right: Julio Tome, Atlas Copco

ERA Sustainability Committee Award

WINNER:

Loxam

The ERA Sustainability Committee said, "The new policy launched by Loxam in 2018 - 'Safety, Anytime and Anywhere' - demonstrates the commitment of the company to safety among its other commitments to society."

SHORTLIST: Atut Rental (HIGHLY RECOMMENDED), A-Plant, Orenprokat

The judging panel

The judges, from left: Pierre Boels (ERA President & CEO, Boels Rental), Alexander Greschner (Chief Sales Officer, Wacker Neuson), Murray Pollok (Managing Editor, IRN), Olivier Colleau (CEO, Kiloutou), Tapio Kolunsarka (CEO, Ramirent), and Michel Petitjean (non-voting chair of judges, Secretary General, ERA).



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MHM's Managing Director Mat Llewellyn (left) with Anthony Morris, the firms' Used Equipment Sales Manager, beside a selection of used MHM generators ready for sale

When updating fleets, rental companies have various options for offloading old stock. Thomas Allen examines what becomes of used machines



Sidney Metz, International Account Manager of Equipment Sales, Rival

As the equipment in a rental fleet ages and customer demands change in response to new legislation, the fleet must be updated. But what happens with the old equipment?

Rental companies have different options open to them. For instance, Rival's used equipment strategy has three aspects to it. In the countries where the firm has rental operations, it sells locally to end users and rental companies; in other countries, it sells through its international department, Rival International Sales; and in both instances it supplements used equipment from its own fleet with used equipment sourced from elsewhere. Only 80% of the used

Afterlife

equipment sold by Rival comes from its own fleet.

Sidney Metz, International Account Manager of Equipment Sales, told *International Rental News (IRN)* that it is not simply a matter of supplying the used equipment Rival already has but also offering other equipment based on an understanding of what customers want; "We try to source machines with input from local people."

He added, "So that's the main strategy – not to just put used machines on the market but also listen to the local sales people because the need for machines can be different in Spain, for example, than in Poland."

Indeed, Metz also made the point that rental companies in the Netherlands, to take another example, primarily buy new equipment, whereas the demand for used equipment is higher among rental companies in Poland. Machines generally move further away from Europe as they age.

"For example, after ten years we can sell them to Eastern European countries, and then after that the Eastern European countries sell those machines to international traders and they sell them again overseas, maybe to Asia or Africa, and so on until they're scrapped," said Metz.

Three-pronged approach

UK-based MHM Plant also has a three-pronged approach, offering customers the choice of buying either new or quality used equipment, or re-renting. The company's national re-rental facility is available only to rental firms, not end users.

MHM's entire range of machines, including ex-rental, are available for purchase. The firm's Used Equipment Sales Manager, Anthony Morris, is responsible for marketing the used equipment and he does so through various online and social media channels, as well as by more traditional methods such as mailshots and face-to-face sales.

Morris said, "Our intention is to keep our rental fleet as modern as possible and then offer them for sale whilst they are still in relatively good condition."

With some older machines, MHM prefers to target overseas clients or make them available for auction.

Recycling

Loxam often sells decommissioned machines through auction houses such as Ritchie Bros and Euro Auctions too, in order to reach a wide audience. However, the company also has another outlet.

Thierry Lahuppe, Equipment Director at Loxam, >

View over Loxam's Equipment Recycling Centre



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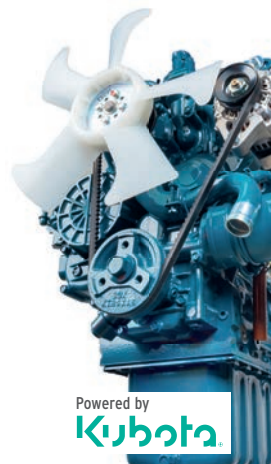
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Martin Sebestyen, Head of Rental and Fleet Management at Zeppelin Rental

Baumaschinen to be sold on. Through this mechanism, "Zeppelin Rental can adjust its fleet size and adopt new technologies accordingly," says Sebestyen Martin, Head of Rental and Fleet Management at Zeppelin Rental.

When it comes to non-Caterpillar equipment, on the whole it is sold either directly to customers in connection with long-term rentals, or in packages to selected dealers who sell machines outside of the company's rental territory.

Zeppelin Rental also sells some products to manufacturers who offer buy-back programmes.

Buy-back programmes

An example of one such OEM is Yanmar Construction Equipment Europe (CEE). The company recently launched a new used equipment remarketing service, intended to help equipment rental firms update their fleets with state-of-the-art models.

Available through approved dealers across the UK and Ireland, the new service enables fleet managers to invest in new equipment without the inconvenience of reselling their existing machines.

Working in partnership with Mascus, an online equipment marketplace, to manage the ongoing resale of each used model, Yanmar CEE pledges to evaluate and purchase existing rental machinery, offsetting the value against new Yanmar models.

Olivier Crahay, remarketing manager at Yanmar CEE, said, "Our remarketing service aims to make refreshing your fleet quick and easy, while alleviating

the issue of selling used equipment. In result, we hope to increase operator access to the latest Yanmar models."

Another manufacturer, Hitachi is accelerating the growth of its dealer rental initiative in Europe by buying used machines from contractors and providing them to its dealers so that they can be offered for medium- and long-term rentals.

Since the initiative was started in Spring last year, 375 machines have entered dealer fleets. Hitachi is now working on proposals for contractors in France, the Netherlands and Scandinavia to acquire their fleets and replace them with Hitachi managed rental machines.

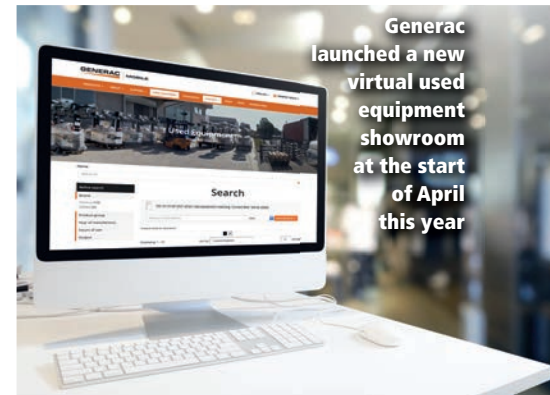
René Danielsson, Manager of the rental programme, told *IRN* that it was now discussing how Hitachi could "consider buying their fleet, upgrade and optimise them, and redefine the number of machines required."

told *IRN*, "As part of its innovation drive, Loxam has a long tradition of channelling resources into an Equipment Recycling Centre, designed and tailored to get the most out of decommissioned machinery at the end of its useful life."

The centre was created 40 years ago and now has a platform called Pideo, which provides Loxam branches with an online catalogue listing all the spare parts available from the centre.

"At the end of their useful lives, approximately 250 large machines and 450 small items of equipment are recovered and taken apart following stringent procedures – depollution and recycling of all waste," said Lahuppe. This allows hundreds of parts in good working order to be recovered.

In the case of Caterpillar's German rental outfit Zeppelin Rental, it continuously rolls out Caterpillar machines to its sister company Zeppelin



Generac launched a new virtual used equipment showroom at the start of April this year



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Under the hammer

Rental companies are particularly important to auction houses such as bidadoo and Euro Auctions, both as sellers and buyers of used equipment.

According to Euro Auctions' Commercial Director, Jonnie Keys, "Following the 2008 crash, when OEMs either slowed or stopped production of new equipment, rental companies turned to Euro Auctions to provide stock for their fleets, and those relationships still hold true today."

Occasionally, Euro Auctions also works with administrators, organising forced sales of rental fleets. The biggest was the disposal of Hewden's crane stock when the company went into administration in 2016. The sale of Hewden's 130 mobile cranes came to a total of £76 million. A more recent example is that of Hawk Plant Hire, which went into administration at the beginning of 2019. The firm's entire stock was disposed of for a total of £29 million.

Over the course of the next ten years, rental companies are predicted to become one of the largest sectors embracing new sustainable technology. As the old equipment is replaced, Euro Auctions expects to sell a lot of it, with much of the non-compliant stock likely to go to Africa, India and parts of the Far East.

Meanwhile, bidadoo's President, Howard Hawk, stresses that the company is more than an auction house; it partners with rental companies, primarily in North America, to offer its reMarketing Solution. Through a suite of tools provided by bidadoo, from reValue – which helps with asset pricing and sales metrics – to reFleet – which supports fleet inventory management – it was said that rental companies are able to better market their equipment to a global buyer base.

Through bidadoo's online platform, it was said that high volumes of equipment can be sold across the globe without the need to transport equipment to an auction yard. The weekly auctions that are run every Thursday by bidadoo, attracting between 50,000 and 70,000 viewers, give sellers a frequent opportunity to sell their used equipment rather than having to wait long periods of time to amass large numbers of machines before holding an auction.

When Hawk Plant Hire went into administration, Euro Auctions sold its stock for a total of £29 million



Jonnie Keys, Euro Auctions' Commercial Director

It is planned that an additional 500 machines will be added to the company's fleet in Europe this financial year and the same number again in the following year.

Italian manufacturer Generac launched a new virtual used equipment showroom at the start of April this year, which offers a portfolio of used, reconditioned and part-new stock for Generac branded products across lighting, pumps, wash racks and dust suppression.

Alessandro Rossi, Managing Director for Generac Mobile, said, "We have seen more demand in emerging markets for low-cost and used machines, and yet do not compromise on quality."

Before being sold on, the machines are reviewed under the same production criteria as Generac's new products; "Complete transparency on the origins of the used equipment is also made available to purchasers with product specifications detailing hours of work, conditions of body work and electrical system. All products are fully supported with our manufacturer's warranty and service," said Rossi.

Moving forwards, the company hopes to feature different brands and machines on the platform.

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An image of the previous Plantworx show. The venue has been moved to the East of England Showground this year

On the move

This year's edition of Plantworx will be held in a new location, at the East of England Arena, Peterborough, UK, and new features of the show include a Drone Zone, a Simulation Zone and a classic equipment display

Despite the chaos of Brexit, the UK construction market has been performing strongly.

Rob Oliver, Chief Executive of the Construction Equipment Association, says that the association's 2019 sector report estimated that construction equipment-related revenues topped £13 billion (€14.6 billion) in 2018. Going forwards, there is some £600 billion (€673 billion) already planned in infrastructure spend over the next decade.

The timing of this year's Plantworx show, to be held at the East of England Arena and Events Centre just outside Peterborough from 11 to 13 June, is ideal for showcasing the latest equipment available to service the growing demand for construction

equipment. There will be a record number of new products making their debut in Britain, many of which were shown for the first time internationally at Bauma 2019.

The East of England venue is new for Plantworx, which is held every two years. The site was chosen in response to the need to find a facility that offered more on-site services to upgrade both the visitor and exhibitor experience. The last Plantworx exhibition suffered from some unseasonably bad weather, so the new venue, which is less than an hour from London by train and adjacent to an arterial road route (the A1), fits the bill with its permanent exhibition hall, paved walkways for visitors and areas for exhibitors to show off their earthmoving machines in full working mode.

With the UK's £56 billion (€62.8 billion) HS2 rail project now underway, Oliver says, "It also makes

WHAT: Plantworx 2019
WHERE: East of England Arena, Peterborough, UK
WHEN: 11-13 June, 2019

www.plantworx.co.uk

sense for us to highlight the civil engineering opportunities offered by this massive undertaking. We have partnered with experts from the rail sector to host Railworx, which has helped grow our anticipated exhibitor numbers to over 500 – a record."

The change of venue has made it possible for new features to be included. Although the outside digging demonstrations remain important, for those who prefer a more static experience in driving machines there will be a new Simulation Zone. For the first time, a number of simulators will be linked up to create a virtual construction site and give operators a taste of the real in a virtual world.

Also new is the 2,000m² indoor Drone Zone, organized in partnership with COMIT, the representative organization for the drone community in construction. This new aspect of the show reflects the fact that unmanned aerial vehicles are now involved in many aspects of the construction world, from site surveying to inspection.

These attractions will supplement specialist areas covering skills, education and training, security and safety, as well as a special students' day to round off the show.

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Exhibitor highlights

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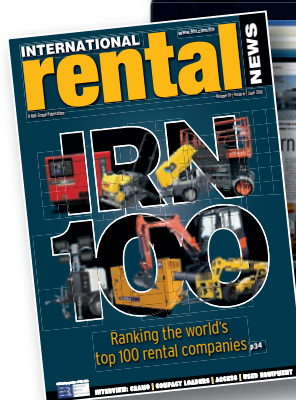
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Rendering of what the rental depot of the future might look like (COPYRIGHT OVERSTORY.ECO, 2019)



Clotilde Jouette, from **Avesco Rent in Switzerland**, and Omar Achment, **founder of Overstory.eco**, look to the future of rental depots in the second article of a two-part series

Rental depot of the future

Do rental companies need a depot in the future?

We've been asked that question many times since our last article on 'Industry 4.0 and Rental' was printed in the April/May issue of *IRN*, and have been pondering over it since starting the project in October 2018.

Our full answer will be laid out here, but let us first begin by looking at recent events at the ERA Convention, which took place in Madrid on the 15 and 16 May. The focus this year was on the sustainability of rental and the circular economy.

The authors

CLOTILDE JOUETTE is the Marketing & Digital Business Transformation Director at Avesco Rent in Switzerland. Avesco Rent represents the CAT Rental Store business in Switzerland. Clotilde is a strong advocate of digital within the rental industry and a member of the European Rental Association's Promotion Committee and Future Group.



OMAR ACHMENT is the founder of Overstory.eco, a start-up firm focusing on business model innovation and sustainability. He previously worked at Accenture developing trading platforms and later as an advisor on the impact of digital technologies to the investment banking industry.

There was a strong message with many interesting speakers and industry leaders from around Europe attending the event. We were both pleased to have an opportunity to present at both the ERA Promotion and Future Group workshops. The feedback, questions and diverse perspectives revealed that what we have to say matters to the industry and it has enriched our work.

In this article – the second of our two-piece series – we will be sharing the findings of Avesco Rent and Overstory.eco's collaborative research into the Rental Depot of the Future. We will examine the notion of function versus purpose based on our research to explain why customers choose to come to a depot. Insights will then be provided into whether you should have a depot or not. In the final part, you will be taken on a customer's journey through the rental depot of the future.

We hope that by doing so we will offer answers to some of the questions posed by those of you who we met in Madrid.

Function or purpose?

Most companies find it difficult in the midst of a rapidly changing environment to focus on where to start their innovation journey.

Rental companies should not rely on technological innovations alone to drive growth as there is more than one possible future. Time and again companies waste capital and resources on innovative initiatives, simply hoping for the best. Innovation is not just about using the latest technology, but needs to take account of the vast differences in social, environmental and cultural conditions.

Predicting the future, therefore, is not just a matter

“ Predicting the future is not just a matter of a binary analysis of functionality; it requires creative thinking ”

of a binary analysis of functionality; it also requires creative thinking that appeals to the human sense of purpose. We need to begin by asking the simple question: Why do our customers come to the depot?

Feedback

This is exactly what we did with the Avesco Rent branch in Lausanne, Switzerland. We conducted interviews to capture feedback on the customer experience of clients and the staff. The responses that we gathered told us that 50% visited the depot to resolve issues such as the collection, drop off and maintenance of machines. When asked if they were given the choice, respondents preferred not to come at all if their needs could be managed remotely. One quarter of respondents said they went to the depot to learn about new products, and the remaining quarter went to have a coffee with a work colleague. The latter may not be what the fleet manager wants to hear, but the results do provide an interesting insight into what the value drivers are for customers when visiting a depot.

This takes us back to the question at the start of this article: Do we need a rental depot in the future?

Yes, we like to think it will exist, and it is a matter of function as well as purpose. Let's now look at >

“ The rental industry must adapt and benchmark itself against other markets to remain competitive ”

the drivers for a rental company to consider when defining their need for a rental depot.

What is the value proposition for the rental depot of the future?

A set of assumptions have been used to come up with a value proposition for Avesco Rent, which may be applied to similar rental companies. The aim was to create something that leverages the existing resources and capabilities, and can be implemented between 0 and 5 years.

The depot will serve as a flagship store and a template for future development to show the capabilities and potential of the rental industry.

Summary of value proposition:

- Improve customer experience based on needs (function)
- Speed of service based on proximity to business/construction site (function)
- A service center offering expert advice on products & services (function)
- Technical service centre with predictive maintenance/self-help services (function)
- Learning facilities to develop new skillsets for

It is suggested that the most significant change to the interior of rental depots will be the addition of a training centre
(COPYRIGHT OVERSTORY.ECO, 2019)

customers and workforce (purpose)

- Forum for customers to share ideas and challenges (purpose)

Areas of Investment

The rental industry needs to adapt and benchmark itself against other markets to remain competitive and should invest in two or more of the following areas:

- IT infrastructure and resources with high-speed internet for E2E harmonisation of assets, systems and data
- Marketing infrastructure to support CRM and omni-channel sales that provides the customer with an integrated customer experience
- Analytics and Bigdata tools to monetise data, improve service and develop new products and services, for example telematics
- Recruit data analysts, programmers, logistics experts and creative designers to leverage the technology and create new opportunities
- Pioneer Internet of Things (IoT) solutions for asset management and operational efficiency

Based on the proposed value proposition, the envisaged ROI benefits* will be:

- Brand differentiation (meeting customer needs)
- High customer ratings and retention
- Sales on value, not price (increase revenues)
- Operational efficiency (time, cost to run)



- New revenue streams from data and assets by offering shared products and services
- *list is not exhaustive*

In parallel, rental companies need to review their business model and simplify the processes associated with existing products and services to improve how they serve customers, identify new product ideas and segment markets, and define where they have a competitive advantage.

Customer journey through the rental depot of the future

Starting with the exterior, the building will be designed to be aesthetically pleasing using recyclable materials and it will operate sustainably through solar energy and rainwater. The building should fit into the surrounding ecosystem with no direct or indirect impact on the environment.

Potential opportunities can be explored in offering waste management services and the sale of

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Moving into the building, the design is entirely based around the customer experience.

The key features are:

- Customers will be able to easily check in and check out equipment through the self-service terminals, saving time
- The screen and tablets will allow users easy access to information on products and services
- There will be a social area where visitors can have a refreshment and interact. This may not apply to all agencies as some agencies may opt for basic services reducing the cost per square meter
- On the far right, the technical maintenance centre will offer real-time interconnectivity using predictive maintenance to reduce downtime

The most significant change will be the training centre. Depots will shift from industrial products and

services delivery (function) to knowledge sharing, learning and creativity (purpose).

Compete for now, prepare for the future

There is no silver bullet solution that can be offered to satisfy all scenarios. However, industry 4.0 offers the rental industry many opportunities and benefits for new products and services, the creation of new jobs, and better ways to serve customers.

Strategically, all companies that want to survive the next ten years and beyond, need to ask what their customers' needs are and how they can be addressed.

Are we a fleet management company in 2030? With whom do we realise the potential of the circular economy? How do we differentiate ourselves and specialise in what we are good at? Do we build our own equipment to meet a

more specific job for our customers? These are all important questions, and by asking them, rental companies are able to predict what their long-term physical assets will look like. Companies with depots may choose to monetise the space by leasing to other rental companies, while others may not opt for fixed depots, instead investing their resources and capabilities in other areas such as fleet management, maintenance services, logistics hubs or possible platform business models.

Technology will be the most powerful differentiator and play a significant role in achieving success. The aim is to make life simpler for customers and the workforce, and achieve operational excellence. Leveraging technology to manage the assets efficiently will remove up to 50% of the existing barriers that prevent customers from accessing services due to systemic inefficiencies.

To conclude this article, Industry 4.0 is here! Rental has a unique competitive advantage in the circular economy to evolve, innovate and secure its position in the future.

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Overstory.eco is an early stage startup based in London focusing on business model innovation and sustainability/



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Rental experts from across Europe descended on Madrid for the 14th ERA Convention, which was held in May

People from across the rental industry came together at the 14th ERA Convention to exchange insights about the Sharing Economy and celebrate their hard work



Michel Petitjean,
ERA Secretary
General



Sharing success

This year's ERA Convention was held at the Melia Castilla Hotel in Madrid, Spain, and the topic of the event was 'Rental: A Sharing Economy'. It was moderated by European journalist Alex Taylor, who has previously moderated five ERA Conventions, the first one in 2006.

In his opening speech, Pierre Boels, President of the ERA, highlighted the fact that Spain is currently one of the fastest expanding rental markets in Europe. The average expected growth rate for the Spanish rental industry in the period 2018 to 2020 is almost 5%. A quarter of the more than 330 convention attendees came from Spain, and so Boels thanked them for being present at the 14th Convention. He also thanked the Spanish rental associations, ASEAMAC and ANAPAT, for their support.

The term 'Sharing Economy' is something of a buzzword and defining it is a challenge, particularly considering how widely the term is used. Definitions are often mixed and range, for example, from peer-to-peer economy and collaborative economy to on-demand economy. Sharing models are often associated with start-ups but also with massive dominating monopolies like the well-known Airbnb and Uber.

Rachel Botsman, an esteemed author and speaker on the subject, brought some clarity during her presentation, defining the sharing economy as: the sharing of the use of assets that have untapped or unused capacity.

Sharing models contribute to a circular economy. They can play a role in extending the amount of time a product is in use and maximising utilisation. A report focusing on the circular economy in Europe identified that, remarkably, the average car is parked more than 90% of the time and office spaces are unoccupied for between 30 and 50% of the time.

The ERA has had several internal discussions to understand if the rental business should be considered as part of the Sharing Economy and whether it benefits from the positive vibes around this phenomenon.

The conclusion of those discussions was that the rental business is in fact at the origin of the Sharing Economy, since the business model is based on sharing equipment. However, rental does have some major differences with other players in the so-called Sharing Economy today. For example, rental companies hire their employees, the own and maintain their own equipment, and – Boels quipped – they pay taxes.

To complete these reflections, the ERA decided to make Rental and the Sharing Economy the topic of this year's convention. Almost all the lectures provided information about this topic – the Circular Economy and the rental business. And many

discussions were dedicated to receiving attendees' opinions about the place and the role of the rental industry in the Sharing Economy.

Boels said, "I hope this convention will be a great opportunity for everyone to gather more information, to share experiences and be able to leave with new ideas and with a feeling that it was useful and enjoyable to attend our convention."

In his introductory speech, Boels offered some reflections on the industry.

"Despite the fact that we are each other's competitor and often fight for every customer or hire, we are also colleagues. To help our customers, we regularly make use of rehire, share information and learn from one another," Boels said.

He emphasised the fact those in the rental industry all have the same passion, which is to help customers to find a solution for their problem.

The ERA, as a platform, provides the opportunity to make this collaborative learning possible. Central to that are the ERA committees; "They are successful and relevant," Boels said, "In the end our goal is that our customers give us a high rating and find our industry indispensable."

The ERA is of great importance for the rental industry, and the high attendance at the convention was a testimony to this. However, there are more rental companies in Europe than were present at the convention. They are smaller national or local players. Their passion is the same but their needs are sometimes different.

At its strategy review meeting, the board decided that the ERA could be of greater significance to smaller rental companies by intensifying its collaboration with the National Rental Association. This will be one of the ERA's main priorities. Boels said, "The ultimate goal for all of us, after all, is to increase the value of renting for our customers."

In keeping with tradition, the European Rental Awards ceremony was held on the evening of the first day of the convention, which celebrated the success of companies in the industry that have developed new ways of thinking and working. **IRN**



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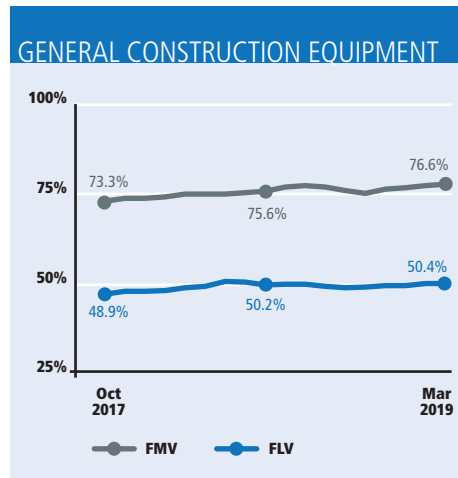


Metric trends

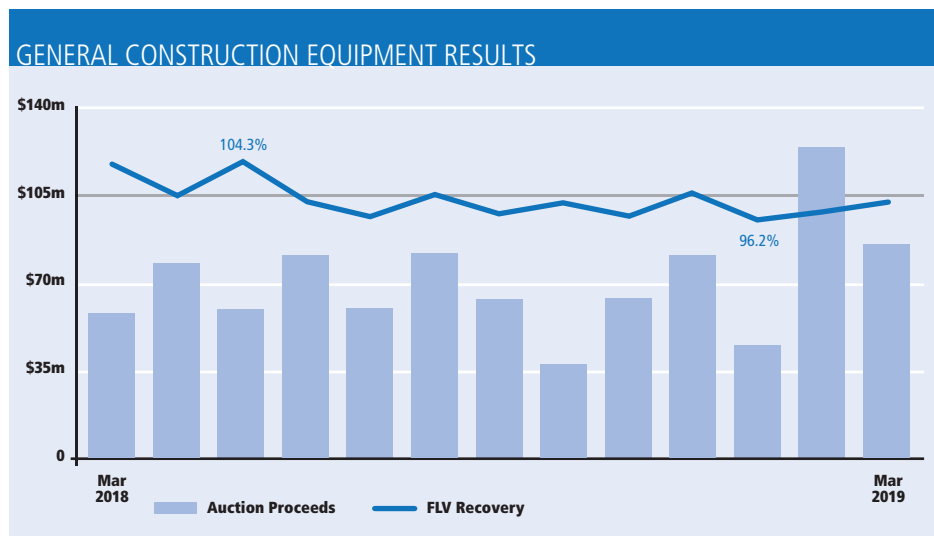
Rouse Services reports on the latest metrics for construction equipment value trends and US auction rates

Early 2019 General Construction values have ticked up with auction values remaining relatively flat. In comparison, Heavy Earthmoving Equipment has shown variability at retail and softness at auction as indicated by the notable Ritchie Bros auction in Orlando, FL. The annual Orlando auction hosted by Ritchie Bros displayed historic volumes but with a little bit of weakness observed overall. Earthmoving equipment (across all sizes and capacities) drove the underperformance with aerial and support

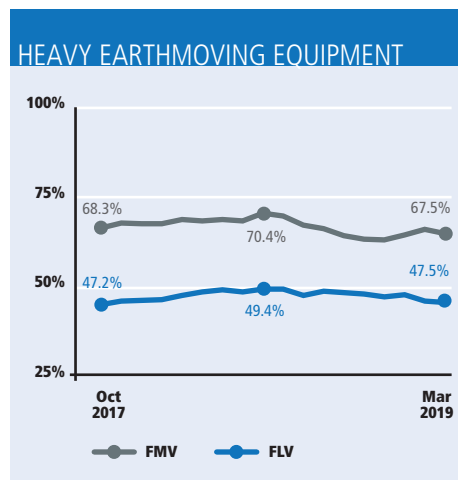
equipment slightly offsetting the weakness. Since the market dropped in mid-2016, General Construction Equipment has recovered to peak levels, which has persisted over the most recent eighteen-month period. This improvement has primarily been driven by telehandlers which have shown material improvement across both the retail and auction channels. Heavy earthmoving equipment has similarly recovered since mid-2016 but has recently shown softness across both channels. **IRN**



■ Retail values have ticked up while auction values remain broadly flattish



■ Auction achievements were fairly in-line with the prior month's market benchmark for General Construction Equipment



■ After a prolonged period of weakness in 2018, retail values have shown inconsistent movement. Auction values have softened a bit over recent months

With nearly 100 years of industry experience, Rouse Services offers business intelligence backed by constantly updated aggregation of equipment values and rental metrics. Rouse Analytics provides monthly comparisons of pricing and key performance metrics to local market industry benchmarks and tracks in excess of US\$500 million (€447 million) of revenue monthly with 52 clients across more than 80 markets.

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Definitions:

Rouse Forced Liquidation Value Index

The average auction (Forced Liquidation Value) recoveries expressed as a percentage of Original Equipment Cost.

Forced Liquidation Value (FLV)

The estimated gross amount expressed in terms

of money that equipment will typically realise at a properly conducted public auction when the seller is compelled to sell as of a specific date within an approximately one month period.

Rouse Rate Index

Achieved rental rates relative to January 2011 (when Rouse

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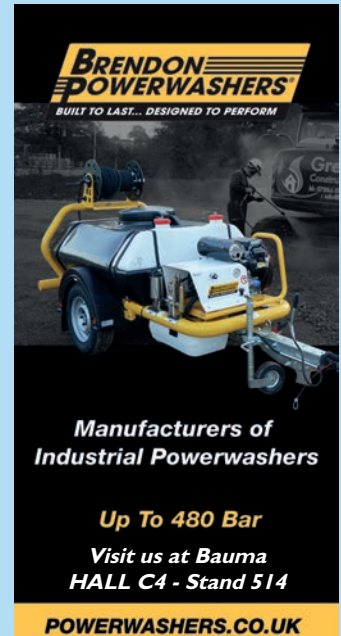
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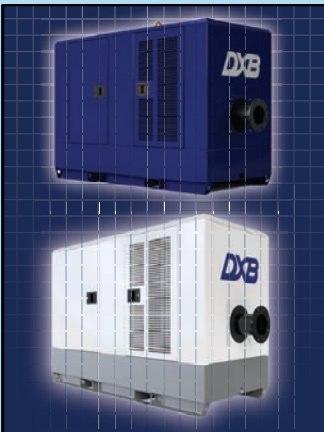
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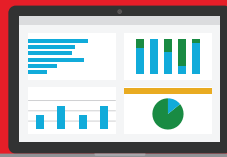
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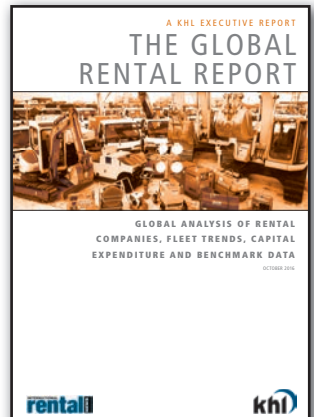
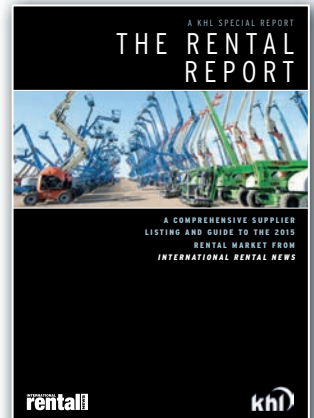
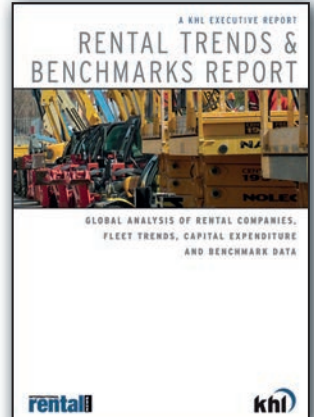
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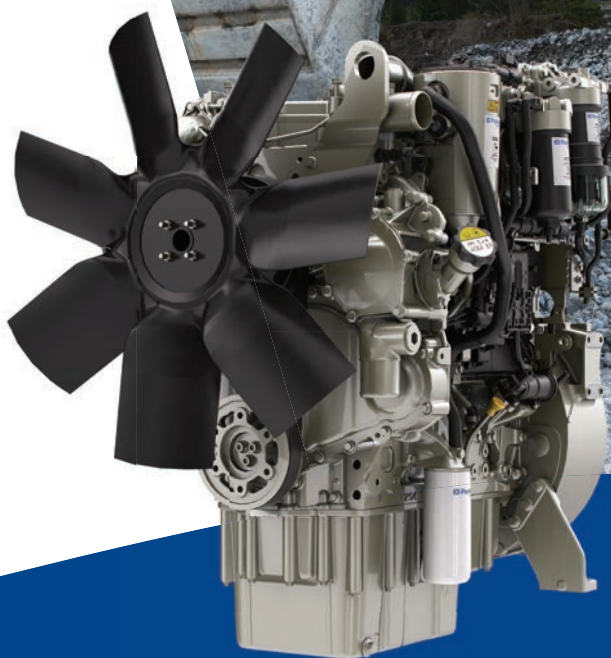
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