

INTERNATIONAL

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# rental

NEWS

A KHL Group Publication  
Volume 20 | Issue 2 | March 2020



Last chance  
to enter  
**p19**

FINAL PREVIEW



**p27**

INTERVIEW

**Liugong starts renting**  
Graziano Cassinelli

**p17**

# Dumpers

**p46**

Official magazine of the ERA



MINI EXCAVATORS | PREVIEW: IRE/APEX | LIGHTING TOWERS



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## Showtime

If you have picked up this copy of *International Rental News* at the 2020 edition of ConExpo, welcome to the show!

In the Last Minute News about ConExpo on page 27, we highlight some equipment launches to look out for during the exhibition. This is accompanied by a Regional Report on the US rental market on page 32. It's certainly show season: I was in the US again just a few weeks ago, running around the ARA Show, and I got the impression that the market is feeling quite positive. Although there are signs of a slowdown, rental investment is plateauing at a high level. And rental penetration continues to grow, fuelled in part by some economic and political uncertainty.

It would seem some kinds of uncertainty are better than others. Across the pond in the UK, I also attended the Executive Hire Show, where manufacturers were telling me that Brexit uncertainty had caused demand to stagnate last year. The blockage was cleared and activity spiked towards the end of the year, though, following the general election and the official departure of the UK from the EU. Turn to the news pages to read the story, or visit [www.khl.com](http://www.khl.com) for the full report.

One topic that has cropped up in conversation has been the coronavirus. Its impact on construction equipment suppliers is difficult to predict not only because we are in the early stages of the outbreak but also due to the complexity of global supply chains. However, manufacturers are monitoring the situation and laying plans to mitigate risk. It will be interesting to see how things develop, but in the meantime take care to wash your hands at ConExpo!

I would like to take this final opportunity to urge you to enter the European Rental Awards if you are a rental company with operations in Europe or a manufacturer supplying equipment to the European rental market. The deadline for submissions is **Friday 28 February**, if more time is needed please e-mail: [thomas.allen@khl.com](mailto:thomas.allen@khl.com). Turn to page 19 for more information, or visit [www.khl.com/rentalawards](http://www.khl.com/rentalawards)

One other thing to look out for at ConExpo is the KHL team, including myself. Seek us out if you have any interesting news to share (booth S-5998) – we're always keen to hear about it.

**Thomas Allen**

Editor

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**TABLET EDITION****KHL's rental portfolio**

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in Maastricht, The Netherlands

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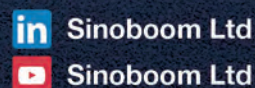
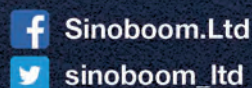
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# inside

**REGULARS****NEWS**

Boels completes offer to acquire Cramo; United Rentals to maintain CapEx; EHS shows uptick in UK rental investment.

**THE APPLETON COLUMN**

Second in a series of articles looking at developing a rental business, Kevin Appleton considers what it takes to keep the ball rolling once the business is established.

**ERA PAGE**

The ERA's Futures Group predicts future market disrupters.

**ROUSE PAGE**

Used equipment values and other rental statistics.

**EVENTS****PREVIEW: EUROPEAN RENTAL AWARDS**

We explain the process of judging the European Rental Awards.

Submit your entries by the deadline of Friday 28 February.

**LAST MINUTE NEWS: CONEXPO**

There are plenty of things to watch out for at this year's ConExpo in Las Vegas, US, but here are a few highlights.

**PREVIEW: IRE/APEX**

While offering a sneak peek of the event, we also provide some practical information about how to register and get there.

**KHL Group on the web**

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

**FEATURES****INTERVIEW: LIUGONG**

Graziano Cassinelli, who will be heading LiuGong's new Global Rental and Used Equipment Business, speaks to IRN about the company's plans.

LiuGong is not the first to see the potential in China.

**MINI EXCAVATORS**

As compact and particularly popular pieces of equipment, mini excavators make good candidates for electrification.

**US REGIONAL REPORT**

Despite some headwinds, the US rental market is still going strong.

**LIGHTING TOWERS**

In addition to being low-cost and safe, it is increasingly being demanded that lighting towers are low-emission and low-noise.

**DUMPERS**

Safety is central to the design of dumpers, with cabs and dual-view options becoming increasingly prevalent.

**INTERVIEW: SKYJACK**

Skyjack's new President Ken McDougall speaks about his global vision.

**SCHEDULING AND DISPATCHING OPTIMISATION**

Customer service has become a differentiator in rental, says Paul Whitelam of ClickSoftware.

**...outside**

The console and seat on Wacker Neuson's Dual View dumper swivel 180°  
See page 46





## DIARY DATES

2020

## CONEXPO-CON/AGG

10-14 March, 2020  
Las Vegas, USA

## SAMOTER

21-25 March, 2020  
Verona, Italy

## IAPA AWARDS

23 April, 2020  
London, UK

## IPAF SUMMIT

23 April, 2020  
London, UKINTERNATIONAL  
RENTAL EXHIBITION  
(IRE)9-11 June, 2020  
Maastricht, The NetherlandsEUROPEAN RENTAL  
AWARDS10 June, 2020  
Maastricht, The Netherlands

## ERA CONVENTION

10-11 June, 2020  
Maastricht, The Netherlands

## APEX 2020

9-11 June, 2020  
Maastricht, The Netherlands

## HILLHEAD

23-25 June, 2020  
Buxton, UK

## PLATFORMERS' DAYS

18-19 September, 2020  
Karlsruhe, Germany

## ALH CONFERENCE

22 October, 2020  
Chicago, IL, US

# Boels completes offer to acquire Cramo

Boels has attained enough shares to complete its offer to buy Cramo.

The number of shares tendered, together with the total of 726,000 shares in Cramo acquired by Boels through market purchases, represents approximately 92.89% of all Cramo shares. This exceeds the minimum requirement of 90%.

Pierre Boels, CEO of Boels Rental, said, "I am excited and proud to announce that Cramo will now become a part of Boels. This acquisition makes Boels a leading player in the European equipment rental market. A perfect position for further growth.

"Geographic complementarity in presence and client base, enables us to double our business and increase our market impact. Together with Cramo we can combine rental equipment, data, technology and expertise to improve our service to customers.



Boels' offer values Cramo at €614 million

"I am looking forward to working together with Cramo, since our companies have a good fit both strategically and culturally."

The news comes after Boels extended

the offer period from 9 to 31 January, and raised its offer price per share by €0.50 to €13.75 earlier in January, valuing Cramo at approximately €614 million.

# United to maintain CapEx in slower growth market

United Rentals will be maintaining a high level of CapEx in 2020, as the company expects to see continued growth, though at a slower pace.

In 2019, United invested US\$2.1 billion in its fleet, and in the year ahead it plans to spend between \$1.9 and \$2.2 billion.

Matthew Flannery, CEO of United Rentals, said, "Our 2020 outlook reflects the profitable growth we expect to deliver in what is forecasted to be a slower growth phase of this continuing upcycle."

Flannery said its results were driven

by growth in its core construction markets, although it faced challenges in industrial business.

The final quarter of 2019 showed a slowing of its growth rate, with revenues up 6.5% compared to a 16.2% increase for the full year.

Fourth quarter revenues were \$2.45 billion with net profits increasing by 9% to \$334 million. United's revenues for the full year grew by 16.2% in 2019 to almost \$9.4 billion. Adjusted EBITDA profits increased by 12.7% to \$4.4 billion, while net profits rose by 7.1% to just under \$1.2 billion.

Rental revenues were up 14.8% to almost \$8 billion. This was helped by the acquisitions of BlueLine and BakerCorp in 2018. The purchase of BakerCorp marked United's entry into the European market.

United is continuing to benefit from growth of its Specialty business, which now accounts for just over 23% of total revenues, generating more than \$2 billion in 2019. Specialty revenues were up 26.8% for the year.

# Algeco acquires in Australia and France

Modular space rental firm Algeco has acquired Australia-based Net Modular, which specialises in manufacturing and servicing modular buildings for schools.

The acquisition strengthens Algeco's position in Australia's education sector, since Net Modular has held contracts with the New South Wales (NSW) Department of Education and Public Works for over 30 years.

Net Modular has about 70 employees and generated 2019 revenues of approximately €50 million.

Mike Smith, Chairman of Algeco, said, "Driving profitability through acquisitions is a clear priority for our business and we are making good progress in this regard with this being our fifth announced acquisition.

This closely follows Algeco's recent acquisition of Altempo in France. Altempo delivers bespoke modular building solutions for large and complex tenders, including accompanying services such as maintenance and security. The acquisition will enable Algeco to tap into this attractive segment of the French modular space market.

Altempo operates a fleet of approximately 3,000 units, has 61 employees and generates annual revenues of about €25 million.





## NEWS IN BRIEF

■ Ausa has signed a 10-year agreement with JLG to manufacture a new ultra-compact telehandler. The new SkyTrak 3013 is designed to handle materials in narrow spaces and will be manufactured in Manresa, Spain. It allows JLG to expand its catalogue to a segment that it had previously not covered. The SkyTrak 3013 is adapted from Ausa's existing T144H and has a lifting height of 4m and capacity of 1,220kg. JLG launched the new model at the ARA Show in the US in February.

■ JCB is making the CESAR Emissions Compliance Verification (ECV) standard on all its EU Stage V and electric machines for the UK market to make identification easier. Also, Hitachi Construction Machinery (UK) will now fit every new mini, medium and large excavator, wheeled loader and wheeled excavator with the CESAR Security System as standard. The CESAR ECV and CESAR Security System are powered by Datatag technologies and supported by the Construction Equipment Association (CEA).

■ Digital tracking technology is to play an important role in Kennards Hire's new depot in Mornington, in the south of Australia. Cloud-based and Bluetooth equipment tracking will be used to gather real-time data to help with preventative maintenance and to monitor how efficiently the machines are running. It was said that this would help to improve safety at the facility. Customer and staff safety is a key focus at the new branch, which also has designated zones and mechanical devices for the safe loading and unloading of equipment.

Middle East-based rental company Hertz Dayim has ordered 93 hybrid, electric and diesel-powered telescopic and articulating boom lifts, scissor lifts and vertical masts from manufacturer Genie. Andy Cater, General Manager Hertz Dayim, Middle East and North Africa, said, "We are one of the fastest growing rental companies in the region. Our investment in the last decade has ensured that Hertz Dayim has one of the youngest and most technologically advanced equipment portfolios across the Gulf."

## US rental bolstered by rising penetration

The American Rental Association (ARA) said rental penetration had significantly increased in the past year, with its penetration index rising from 55.9% to 56.7% between 2018 and 2019.

The reasons given for the increase included uncertainty over presidential elections, the growing technical complexity of equipment, and the evolution of rental companies into 'problem solving' businesses.

"This is one of the main factors that is keeping rental revenues growing faster than GDP and in the face of a flat outlook for construction



spending", said ARA Vice President of Government Affairs and Chief Economist, John McClelland.

The association also forecast that US rental revenues would grow by 3.8% to \$58.1 billion in 2020. It projected 4.1% growth in 2021, 4.2% in 2022, and 3.5% in 2023, reaching \$65.2 billion. This is higher than the previous estimate of \$64.1 billion.

Read more about the US market in our regional report on page 32.

## Don't miss ERA Convention and IRE

Pierre Boels, President of the European Rental Association and CEO of Boels Rental, has urged companies to make the most of the ERA Convention and International Rental Exhibition (IRE), in Maastricht, the Netherlands.

The ERA Convention is on 10 and 11 June, while IRE is over three days, from 9 to 11 June.

"The event provides a unique opportunity for rental companies to meet equipment manufacturers and other suppliers to the rental industry, and to discover new equipment and services all under one roof in three days," said Boels.

In addition to IRE, the ERA Convention and APEX, the European Rental Awards dinner will be on 10 June.

The deadline to enter the awards is **Friday 28 February**. Turn to page 19 for more information.

## EHS shows uptick in UK rental investment

Manufacturers at the Executive Hire Show reported an uptick in demand from rental firms in the UK following the election result in December.

Among them was Alessandro Rossi, Managing Director of Italy-based Generac Mobile Products, who told IRN the UK market had been rather stagnant most of last year, as people waited to see what would happen with Brexit and the general election.

"I am hopeful that the UK government will put more focus back on investment in construction, such as infrastructure projects, now that the first stage of Brexit is over," he said.

When asked about the possibility of

tariffs, he said, "Pramac-Generac is in the same boat as other non-domestic suppliers, so I'm not particularly worried about tariffs."

Ian Brown, Deputy Chairman of UK dumper manufacturer Thwaites, echoed Rossi's sentiment about government investment, saying, "We saw a slowdown in the UK market before the election at the end of 2019, but it has since picked up again, and we are anticipating investment in housing and infrastructure in the year ahead."

**Alessandro Rossi, MD of Generac Mobile Products**



## IRN Rental Share Index

COMPANY		SHARE PRICES			
		Start date 07/01/06	Previous mth 10/01/20	Current mth 14/02/20	% change
Aggreko (UK)	£	2.75	10.03	9.9	-1.3%
Ashtead Group (UK/US)	UKE	1.83	32.26	35.24	9.2%
Cramo (Fin)	€	13.0	13.22	13.75	4%
Emeco	US\$	—	2.29	2.07	-9.6%
GAM SA (Spain)	€	8	1.7	1.95	14.7%
Herc Rentals	US\$	—	47.82	43.85	-8.3%
HSS Hire	UKE	—	41	43.88	7%
H&E Equipment	US\$	—	31.41	29.75	-5.3%
Kanamoto	Yen	—	2794	2726	-2.4%
Mobile Mini (US)	US\$	46.2	38.53	42.33	9.8%
Ramirent (Finland)	€	23.43	8.77	8.77	0%
Speedy Hire (UK)	UKE	8.32	0.79	0.86	8.9%
United Rentals (US)	US\$	24.9	163.23	160.08	-1.9%
VP PLC	UKE	—	10	10.1	1%
<b>IRN INDEX</b>		<b>100</b>	<b>447</b>	<b>475</b>	<b>6.3%</b>

**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.



## PEOPLE NEWS



**■ Graham Arundell** is to stand down as the CEO of Hire Association Europe and Event Hire Association (HAE EHA), the UK's trade association for the rental industry, at the end of April, 2020.

During his 13-year tenure, Arundell is credited with turning around the fortunes of the organisation, which had seen its membership numbers and funds dwindling.

**■ Peter Mikes** has become the new CEO of Swedish rental company Lambertsson Sverige. He stepped into the role at the beginning of 2020, succeeding Ola Angel. A civil engineer with an industrial background, Mikes is the former CEO of technical consultancy Exact Svenska Mätcenter. Angel, who has taken on a new position in the Industrial Division of parent company Peab, will continue to support Lambertsson.

**■ Fernando Pinera** has been named CEO of SmartEquip, taking over from former CEO, Bryan Rich. Rich remains executive chairman of the company. During his tenure, Pinera spearheaded the transformation of SmartEquip's operating practices as well as set the foundation for significant growth of SmartEquip's network.

# ERA pushing sustainability

The European Rental Association (ERA) is to launch a promotional and lobbying campaign to highlight equipment rental as a sustainable option in the construction process.

The goal of the campaign, which will be launched in the coming months, is to promote rental as a cost-effective and 'green' solution in comparison to other options. It will be linked to the goals of the EU's recently announced European Green Deal.

Huw Longton, the ERA's Communications Manager who is responsible for the campaign, told *IRN* the aim was to make sure that rental is encouraged as part of the Green Deal, which targets a no net emissions economy by 2050.

"[Rental has to be] exemplified

as a good practice to avoid carbon emissions, for example in green public procurement", said Longton, "and to drive awareness of the environmental benefits of rental, backed by the results of the ERA's recent Carbon Footprint of Construction Equipment study."

Longton added, "EU policies should recognise and encourage practices that optimise or minimise the climate impact of construction equipment use."

"Circular Economy 2.0, European Green Deal, Green Public Procurement, Decarbonisation Package – all of these [EU policies] should progress in the first half of this year."

The ERA will participate in events in Brussels and prepare materials including videos and leaflets.

# Coronavirus and the construction industry

With global cases of coronavirus increasing and many Chinese citizens staying at home, it is likely that a strain will be placed on global supply chains.

With many Chinese workers not

at factories, there are fears that the global supply chain could be squeezed and lead to delays for the construction industry.

Alejandro Alvarez from Ayming, a consultancy that specialises in supply chain and operations performance, commented, "When it comes to supply chains, the ripples of the coronavirus are only just emerging."

"Companies are working on their risk assessment plans, but, in reality, how many businesses can trace all their supplies to source? It's very difficult to get a full grasp on the matter and many companies could be underestimating their exposure."



ConExpo organiser AEM says show will be unaffected by coronavirus

## 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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### Digital magazine

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### Online news

KHL's team of journalists in Europe, North America and South America are constantly uploading stories to KHL.com. The site has dedicated pages for each sector – rental, construction, access, canes and demolition.



### Weekly newsletters

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**rental newsletter**

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## ON TWITTER



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The Health & Safety Executive have recently harnessed our expertise as the UK's market leader in powered access to develop and deliver a bespoke MEWP Technical Training Course to their team of Mechanical Inspectors.

### @NWplatforms

21 January, 2020



Further investment to our General Plant & Tool Hire division... Delivery of 2 new Macgen 35Kva fast tow diesel generators

### @dromadhire

23 January, 2020

We have optimised our website to provide our customers the most intuitive and user-friendly interface. Thanks to our daily update you can always check out our newest machines and parts.

### @Vertimac

30 January, 2020



# DINGLI

*Exceed New Height*

## Extraordinary Height Larger SWL Ultra-light Design

### Subversive Design

Sophisticated European R&D·Intelligently manufactured by Dingli in a new state of the art facility·Global Patent Protection

### 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 454kg on telescopic booms and 300Kg 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)

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### Telescopic Boom Lifts

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### Articulating Boom Lifts

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



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## NEWS IN BRIEF

■ What was supposed to be an effective date of 1 March for the new ANSI A92 suite of standards will likely be pushed back, again, as four appeals on the proposed BSR/SAIA A92.20 and A92.22 standards were brought forth in mid-January. One of the appellants has requested to proceed to a hearing. The original deadline to submit final actions to the ANSI Board of Standards Review was set for 31 January.

■ Ruthmann will launch a large truck mount at APEX this year. While the manufacturer is not sharing any details about the new machine yet, it said it results from a greater demand worldwide for truck-mounted platforms with working heights above 50m. The reason for this lies in health and safety, as truck mounts replace large self-propelled machines and can offer a better return on investment, as well as there being a greater need for them in the growing wind power sector, said the company.

■ Haulotte has set up a BIM (Building Information Modeling) library on its website. It means construction professionals can now incorporate computer-generated versions of Haulotte's models into their design plans to provide an accurate picture of what equipment is required. The library includes eight models so far: the HA16 RTJ Pro and HA20 LE Pro articulating booms, HT23 RTJ Pro telescopic boom, compact 10DX, 12 DX and Optimum 8 scissor lifts, the Star 10 vertical mast and HTL 4017 telehandler.

## BrandSafway agrees to acquire AGF Access Group

BrandSafway has signed an agreement to acquire AGF Access Group.

AGF Access Group includes four divisions: two product groups consisting of Hydro Mobile and Winsafe, and two rental divisions made up of AGF Access and Hydro Rents. AGF Access Group is located in L'Assomption, Quebec, Canada and has two manufacturing facilities and 24 branches across North America.

The closing of the transaction is anticipated for early 2020.

"This is an exciting opportunity for us to partner with a leader in motorised access equipment, enabling us to grow our market presence in mast climbing, suspended access solutions, elevators and building maintenance units throughout North America," said Dave Witsken, President of Energy and Industrial at BrandSafway.

"With a dedicated team of engineers, a strong distribution network, world-class manufacturing and experienced leadership, AGF Access Group will bring great value to BrandSafway.

As a combined entity, we will be able to provide an even wider range of access solutions."

# Manitou full-year sales up, forecast down

Revenue was up over the full 12 months of Manitou Group's 2019 financial year but sales fell in the fourth quarter, compared to the same period in 2018, and the company forecasts a slower 2020.

Manitou reported fourth quarter revenues of €494 million, down 6% on the fourth quarter of 2018.

However, over the full year sales were up 11% to €2 billion.

Orders in the fourth quarter of 2019 were up considerably, compared to the third quarter's figure of €244 million. But the company ended the fourth quarter with €595 million in its order book, down from €1 billion at the same time in 2018.



Manitou exceeded revenues of €2 billion for the first time

Year-on-year, the group also confirmed a lower revenue outlook for 2020 and said it expected that sales would drop by 10%, compared to 2019.

Michel Denis, President and CEO, said, "The group ended the year with a revenue that exceeded the €2 billion mark for the first time in its history, while strengthening its global presence and market share.

"The doubling of order intake in the fourth quarter compared to the previous quarter gives the order book a depth of around four months of activity.

He added, "In the fourth quarter, customers demand remained strong across all sectors. We note, however, that in the construction sector, rentals continue to speak positively on market dynamics, while maintaining a wait-and-see attitude with regard to their investment decisions."

## NEWS IN BRIEF

■ Spimerica is the new US distributor for MEWP manufacturer Palazzani Industrie's tracked platforms. Speaking of the decision to partner with Palazzani, Spimerica's Manager Ben Taft said, "Spimerica chose Palazzani as their premier manufacturer because of the rich history Palazzani offers." He also made reference to their commitment to safety.

■ Haulotte's subsidiary in Russia, Haulotte Vostock, is celebrating its 15<sup>th</sup> anniversary. The subsidiary opened its doors on 31 January 2005. The manufacturer said the main reason for setting up a representative office in Russia was to get closer to customers and provide them with a high level of service support. The company said it was now the leader in the Russian market for aerial platforms.

## Alimak Group CEO stepping down

Tormod Gunleiksrud has announced that he will step down as President and CEO of Alimak Group this year.

The company's board of directors said it had begun the campaign to find a successor.

Gunleiksrud was appointed CEO and President of Alimak Hek Group (as it

was then called) in November 2012, taking over from the interim CEO, Lars Josefsson.

At the time, Alimak said Gunleiksrud was a perfect match for the group thanks to his experience in a range of industrial-related roles, including in China.

His most recent role was at ABB in Switzerland as Manager of Operational Excellence for the Robotics Business Unit. Previous work experience includes executive roles within the robotics, process automation, and oil and gas businesses of ABB, where he worked since 1984.

It has not yet been confirmed what Gunleiksrud's next position will be.

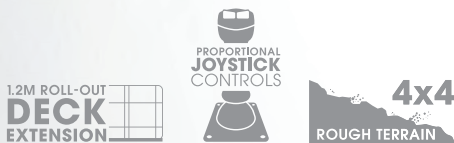


Tormod Gunleiksrud, outgoing CEO and President of Alimak Group



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# Learning to walk

**In the second article of a series looking at starting and growing a rental business, Kevin Appleton considers what it takes to develop a solid business once you have got the ball rolling**

**L**ast time we took a look at some of the complexities and challenges of getting a new business going – getting past the point of survival to making the first baby steps. Now we're going to look at what happens once you've survived the first 3-5 years and start to turn your thoughts towards making a really solid business, with a chance of longer-term survival.

Based on my own experience I'd say there are three particular areas of focus for business leaders who are looking to grow a business from a handful of staff to one that employs 50-plus people. The focus areas are people, processes and cash.

## Starting with people

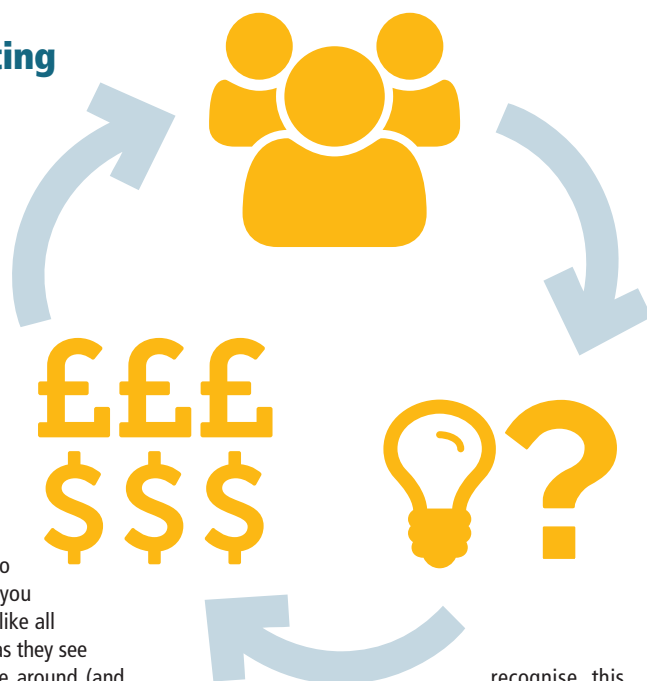
We'll start with people because that's where it really does all start. This phase of business growth sees you move from having a handful of trusted, hard-working, loyal but, often, skill-limited employees, with very loose organisation structures and responsibilities.

However, if things have gone well, within five or so years you'll have an organisation that has identifiable departments, with intermediate levels of management. Roles have become more focused and, inevitably, responsibilities and structures are tighter.

Managing this transition is tough for one big reason. The people who were supportive and trusting of you when you started the business will, like all humans, have their limitations. Yet as they see you starting to bring in new people around (and even above) them, it's hard for them not to feel like they're being "sidelined" in favour of new and shiny people who don't remember the hard graft of the early days. This leads to jealousies and, often, to distracting and unproductive tensions in the organisation which can end up impeding growth ambitions altogether.

## Loud and clear

The only way I've found of effectively dealing with this is to talk loud and long about the inevitability of this from the outset. Make it clear to everyone in the business, at all stages, that growth will mean that most of us will feel, at some point, diminished in importance compared to where we were. Being honest about this enables you to put an alternative view on this too – being that we should all expect our roles to become more and more focused and expert. This is about giving the entire organisation the opportunity to do the best possible job for everyone as a result of getting bigger and, if explained correctly, this should be seen as positive rather than threatening. However, if you find you have egos in the team that can't deal with this reality, then it's best to



recognise this and deal with it there and then, rather than letting it become a source of future cultural poison.

Getting processes right is a necessary follow-on from the people stuff. As the organisation gets bigger, there needs to be a move from informal "head knowledge" to use of systems and procedures. Inevitably, when you first introduce a more systematised approach to something (be it expenses, recording and responding to equipment breakdowns, sales targeting or whatever) it will seem horrendously over-engineered, an affront to people's intelligence and much slower than what you have been doing. However, if you don't do it you'll really struggle with efficiently inducting and training new people (you simply can't effectively train something that only exists in someone else's head), which, in turn, means you have chosen to limit your future growth.

## Critical cash

Cash remains critical throughout the growth cycle and ensuring that the business is always able to settle its bills, pay its debts and invest appropriately for the future is more important than any other financial measure. People regularly talk about how fast their business is growing, how big their fleet is, how many locations they've opened and so on, but unless there is adequate thought given to the future cash implications of each of these factors, they risk being ill-conceived and short-term boasts. Many businesses get stuck at this intermediate stage because they have defaulted on finance agreements and, consequently, find it very hard to repair their reputation as a risky debtor.

However, if you manage to assemble good people, well-thought-through processes and a prudent control of cash, you are on the way to becoming a national business. That's what we'll look at next time.

**IRN**



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

**“ If you manage to assemble good people, well-thought-through processes and a prudent control of cash, you are on the way to becoming a national business. That's what we'll look at next time. ”**





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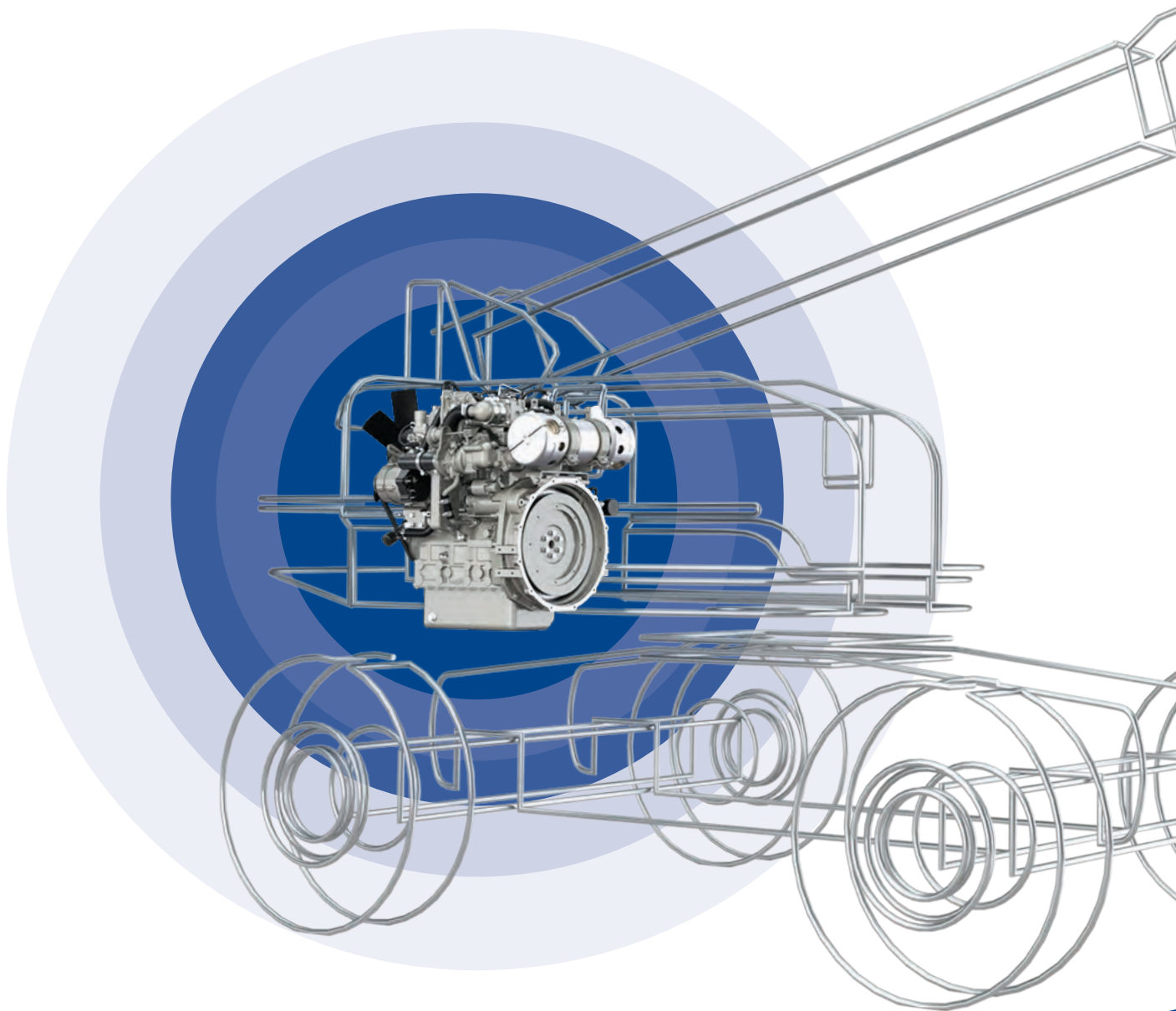
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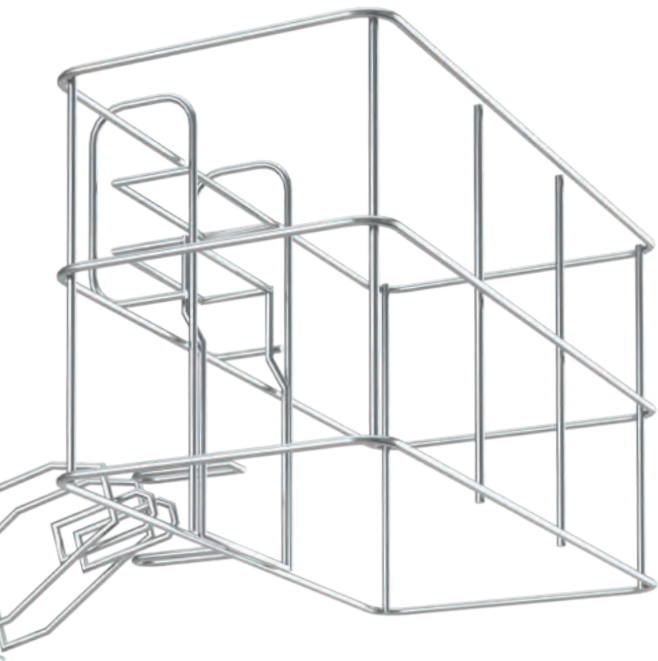


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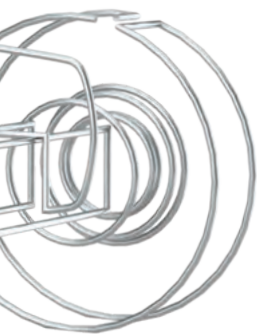
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Among the equipment initially available for rent will be LiuGong's 908E excavator



Graziano Cassinelli, who will be heading LiuGong's new Global Rental and Used Equipment Business, speaks to Thomas Allen about the company's plans

# LiuGong starts renting

**L**iuGong is responding to the growing demand for rental in China and Southeast Asia by launching a new Global Rental and Used Equipment Business, which will be headed by former Caterpillar rental manager Graziano Cassinelli.

Due to be implemented soon, the new offering will be available through LiuGong's dealers and supported by a centralised fleet of equipment. The number of units has not been specified.

Cassinelli told *IRN*, "Our primary focus is to leverage and improve rental and used dealer capabilities."

When asked what regions the new Global Rental and Used Equipment business will be operating in, Cassinelli said, "Our 2020 priority is China and Southeast Asia."

Cassinelli has a 30-year career in industrial and construction equipment behind him, working with CNH Industrial and Caterpillar dealers CGT and Barloworld Equipment Limited.

**Graziano Cassinelli will be heading LiuGong's new Global Rental and Used Equipment Business**

During his four-and-a-half years at Caterpillar, Cassinelli worked as a manager in used equipment and rental, most recently based in Singapore. Prior to that, he was Rental and Used Executive Director at industrial brand management company Barloworld Equipment for more than seven years.

LiuGong's dealers will initially be focused on renting the manufacturer's wheeled loaders and excavators, but other products from the manufacturer will be introduced over time. No other complementary brands will be rented – at least to begin with; "Initially we will be focused on our core business machines," said Cassinelli.

## First equipment

To begin with, the equipment that will be available for rent will include LiuGong's 906D, 908E, 920E and 936E excavators, 825C, 836 and 816C wheeled loaders, 4180 and 4180D motor graders, the 365B skid steer, 160CW and 140C soil compactors, and 2 and 3 tonne CLG Series forklifts.

At the time of speaking to *IRN*, Cassinelli was unable to comment on whether LiuGong's dealers would have to buy the equipment before renting it, and whether LiuGong would be looking to enter partnerships with independent rental companies.

He did however speak of changing customer needs in China, saying, "They are quickly moving from



**Kevin Thieneman, VP of LiuGong Machinery and Chairman of LiuGong North America and LiuGong Latin America**

ownership to the rental business model to reduce their company risk."

"LiuGong wants to be on top of the task of providing the right customer solutions anytime, anywhere."

Kevin Thieneman, Vice President of LiuGong Machinery and Chairman of LiuGong North America and LiuGong Latin America, added to this, saying,

"Rental is the largest segment for the construction equipment industry in Europe and North America, and is projected to become a leading segment in China.

"In addition, effective management of used equipment is an important element to ensuring end users enjoy lower total cost of ownership."

"This new endeavour will champion LiuGong's efforts to become a leader in rental and used equipment."

Commenting on the wealth of knowledge Cassinelli will be bringing to the new role, Thieneman said, "Graziano has dedicated his career to rental and used. He has OEM experience at Caterpillar and CNH Industrial as well as dealer experience at CGT and Barloworld. LiuGong is fortunate to have a leader with such rich experience."

Cassinelli said, "With its tough equipment, LiuGong offers the type of machines and equipment that the rental market needs and wants. And the opportunity to spearhead this effort with LiuGong is one that I am looking forward to."

LiuGong's initiative reflects a growing focus on rental by some major OEMs. In the past 18 months, for example, Hitachi has launched a dealer rental programme in Europe, which it is also now expanding in China. Caterpillar's dealers, meanwhile, have long been involved in rental.

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Chinese customers are quickly moving from ownership to the rental business model to reduce their company risk.





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The winners of the 2017 awards



**IRN explains the judging of the European Rental Awards, held this year alongside IRE and APEX**

# Judging the awards

**T**his year will be the 12<sup>th</sup> time the European Rental Awards have been held, so perhaps now is a good time to shine some light on how the awards are judged.

It is inevitable that there will be some mystery surrounding why some companies end up on the stage and not others, but the way decisions are made is actually pretty clear and based on two key factors.

The first of these is the award submissions themselves. Companies are asked to give clear explanations of what they have done and why they are deserving of the award. The judges do not assess the quality of the language, or the beauty of the submissions, but focus on the content and the claims. (Judges are given the submissions two or three weeks in advance of the judging meeting, which is held at the ERA's Brussels head office.)

In some cases, the judges also call upon expertise within their own organisations. For example, the digital award submissions may be looked at by digital experts at the judges' company. Likewise, procurement directors and fleet managers at the judges' companies will often have an input into the product of the year award.

## Knowledge and experience

That use of company expertise takes us to the second factor, which is the knowledge and experience of the judges themselves. Although they are assessing the information submitted, they also use their own backgrounds in business – and rental – to assess the entries. They are in a position to view claims in the context of their own market knowledge and activities.

Of course, that requires judges who have that knowledge and experience. One of the reasons for the success of the awards is that judges are senior people. This year's panel includes the CEO of Boels Rental, the CEO of Avesco Rent, the general manager of Bredenoord, and JLG's most senior executive in Europe. Together they have multiple decades of experience in Europe's rental scene.

Representatives from the ERA and IRN on the panel help to provide continuity and consistency in the process and ensure that the decisions properly

reflect the views of the whole panel.

It is also inevitable that issues surrounding conflicts of interest sometimes arise. In the product award, for example, judges will often have relationships with certain OEMs. Likewise, OEM judges will have competitors who have submitted awards.

If you have active, senior people on the panel, there is no escaping this issue. However, in practice, it is not unusual to find the CEO of an OEM voting in favour of a product from a major competitor. And the large rental company award will necessarily be chosen by a group involving a competitor. In a group meeting, the requirement to be non-partisan in very clear.

**IRN**

## Award categories

There are eight award categories, six of which will be assessed by the panel of judges, and two by the relevant ERA Committee.

### ASSESSED BY JUDGES:

- Large Rental Company of the Year (revenues above €15 million)
- Small/Medium Sized Rental Company of the Year (revenues below €15 million)
- Rental Product of the Year
- Best Digital Innovation
- Rental Person of the Year
- Lifetime Achievement Award

### ASSESSED BY THE ERA COMMITTEES:

- ERA Technical Committee Award (no entries called for)
- Best Sustainable Rental Project of the Year (entries required)

Please submit entries by **Friday 28 February, 2020**. If you need more time, contact Thomas Allen, Editor, IRN (Tel: +44 (0)1892 786209, e-mail: [thomas.allen@khl.com](mailto:thomas.allen@khl.com)).

## Awards dinner

**JUDGES' MEETING:** Thursday 26 March, 2020

**AWARDS DINNER:** Wednesday 10 June, 2020

**REGISTRATION:** [www.erarental.org](http://www.erarental.org) (see 'Events' tab)

**ENTRY FORMS:** [www.khl.com/rentalawards](http://www.khl.com/rentalawards)

**ERA CONVENTION:** 10-11 June, 2020, Maastricht, the Netherlands

**ORGANISERS:** International Rental News (IRN) and the European Rental Association (ERA)

## Judging panel

The judging panel for the 2020 European Rental Awards is as follows:



**Vincent Albasini**,  
CEO,  
Avesco Rent



**Pierre Boels**,  
President,  
ERA & CEO,  
Boels Rental



**Jaap Fluit**,  
General  
Manager,  
Bredenoord



**Karel Huijser**,  
General  
Manager & VP,  
EMEA,  
JLG Industries



**Murray Pollok**,  
Managing  
Editor, IRN



Non-voting  
chair: **Michel Petitjean**,  
Secretary  
General



**As compact and particularly popular pieces of construction equipment, mini excavators make good candidates for electrification. Thomas Allen reports on the shift to alternative power sources in the sector**

# Little dynamos

**T**he buzz around electrification is clearly audible at any construction equipment trade show nowadays, especially with smaller equipment. And for good reason: there seems to be a strong and growing demand for it.

For instance, Doosan Bobcat saw its new E10e

zero tail swing electric mini excavator sell out just after the first of the models rolled off the production line in mid-2019.

The tracked models are produced at Bobcat's Dobris factory in the Czech Republic, which has a production capacity of 2,000 units per year.

## Rolling out new technologies

Hitachi Construction Machinery (Europe) (HCME) recently teamed up with European telematics company ABAX to make Hitachi's remote monitoring system, Global e-Service, available on its latest Zaxis-6 range of mini excavators.

Giving users access to data on the machines was said to simplify fleet management and maintenance scheduling. In this way, productivity, efficiency and availability are increased, and running costs are reduced.

The software is available on all of Hitachi's current mini and compact equipment, and it can be retrofitted to previous generation models by Hitachi's European dealers.

Meanwhile, Italian compact equipment manufacturer Messersì is rolling out servo controls on the joysticks across its range of tracked mini excavators.

The new controls allow the boom swing and PTO (power take-off) to be controlled by proportional rollers on the joysticks, rather than via standard pedals. While the rollers allow more precise control of the machine, the removal of the pedals also provides more space.

The roll-out started with Messersì's 2.3 tonne zero tail swing model, and then the 2.5 and 3.4 tonne zero tail swing models. This was followed by the 1.6 tonne standard model last year, and in 2020 the roll-out is due to be completed with the new 1.5 tonne zero tail swing M-16U and 5 tonne zero tail swing M-55U models, as well as the 5.4 tonne M-60U with articulated boom.

**Hitachi's Global e-Service monitoring system is being made available on its Zaxis-6 range**



**Messersì's M-16U (pictured right), M-55U and M-60U excavators will be updated with servo controls this year**



Jarry Fiser, Mini Excavator Product Line Director at Doosan Bobcat EMEA, said, "We are very pleased that actual demand is higher than our original expectations and production capacities."

"The E10e is just the start of our journey in further expanding our portfolio in alternative power sources."

The first E10e off the production line was delivered to Netherlands-based dealer Inter-Techno, where it is being used for demonstration and rental.

At 71cm in width, the E10e can pass through a single doorway, which, together with its lack of exhaust fumes, makes it particularly suitable for indoor use.

The model is powered by a maintenance-free lithium-ion battery that can operate for up to four hours on one overnight charge using a standard 230V socket. It can also be recharged to up to 80% of its capacity with an optional 400V supercharger.

## Prize winning

German compact equipment manufacturer Wacker Neuson recently won a SaMoTer Innovation Award in the hydraulic mini excavator category for its first electric mini excavator, the EZ17e.

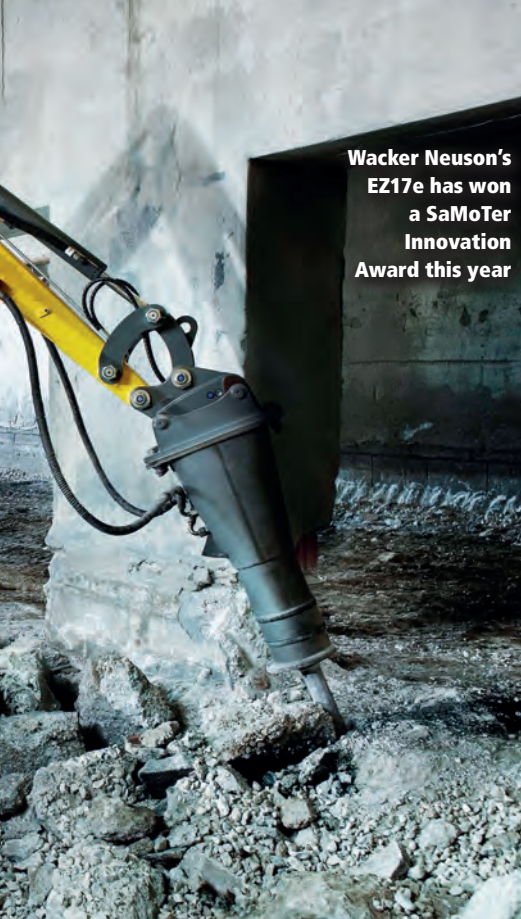
The battery-powered machine won the award for its efficiency, the optimal integration of the electric drive, and its performance. The EZ17e has been designed to perform and handle like a diesel-powered model.

Martin Lehner, CEO of Wacker Neuson, said, "We've channelled years of experience and expertise in zero emission products into our first mini excavator with battery and electric drive technology."

"Our development work always focuses on usability and customer value, which is why we make no compromises when it comes to performance, with power ratings matching those of our diesel-powered model."

The EZ17e also weighs virtually the same as its





Wacker Neuson's EZ17e has won a SaMoTer Innovation Award this year



A-Plant recently added 10 of JCB's electric mini excavators to its fleet

“ For rental companies in particular, these solutions are an interesting supplement to existing fleets as customers rent products for jobs indoors. ”

diesel counterpart and can therefore be transported on a trailer.

Alexander Greschner, Wacker Neuson's Chief Sales Officer (CSO), said, "Electric drives are becoming increasingly important.

"For rental companies in particular, these solutions are an interesting supplement to existing fleets as many of their customers rent products for specific projects such as renovation work inside buildings or tunnel construction."

He added that electric drives are low-maintenance; "This is a huge benefit as it reduces maintenance time and costs, and maximises machine availability."

While the excavator can be run entirely on its battery, the smart charging management system gives the option of operating, and even charging the machine, while it is connected to a mains power supply.



Doosan Bobcat's E10e sold out as the first units rolled off the production line last year

The lithium-ion battery can be charged overnight using a domestic socket of either 110 or 230V, or in just four hours using a high-voltage power source.

JCB is also producing its own electric excavator, the 19C-1E, which went into full production in the fourth quarter of 2019.

Europe's largest rental company, Loxam, recently bought its first electric mini excavator from JCB.

The machine, which was delivered to Loxam's depot in Colombes, north-west of Paris, is said by JCB to be five times quieter than its diesel counterpart.

Loxam's Group Equipment Director, Thierry Lahuppe, said, "The addition of this first electric mini excavator to the Loxam equipment fleet shows our genuine commitment to the development of a more responsible rental sector which is respectful of the environment and urban work sites.

"As a leading player in the rental sector, Loxam aims to show how essential it is to offer a range of electrical equipment. It is about preparing for the future and meeting the growing environmental requirements of our customers who work on urban construction sites."

The 19C-1E has four lithium-ion battery packs providing a 20kWh storage capacity. A battery management system ensures full-shift availability and the option for 230V charging when required, with 10 hour recharging time.

## Investing in electric models

A-Plant also invested more than £350,000 in 10 of JCB's electric mini excavators recently.

Dave Harris, Business Development Director for the UK-based rental company, said, "Over the past year, we have witnessed significant customer demand for sustainable construction equipment and have made this a key focus of the company's investment strategy."

## Proving popular

Mini excavators have never been more popular, according to specialist market research and forecasting company, Off-Highway Research (OHR). Global sales of machines under 6 tonnes operating weight are believed to have exceeded 290,000 units last year.

That would make 2019 the third year in a row that global sales of these machines set a new record. Whereas global sales of many types of construction equipment are currently below the high-tide mark that was set in the boom of the mid-2000s, demand for mini excavators is now a staggering 60% higher than it was in that period just before the collapse of Lehman Bros.

OHR believes there are several reasons why demand for these machines has been so strong. First, they are replacing other types of traditional machines, particularly backhoe loaders, in many developed markets. There is a preference for machines with a smaller footprint than a backhoe loader and 360° slewing structure is a big advantage over the 'Swiss Army Knife' machine.

In addition, mini excavators are gaining ground in many emerging markets. They essentially replace manual work, so this is always a challenge in countries where labour is cheap and indeed construction projects are often intended to provide employment to as many people as possible. However, rising labour costs and the need to complete projects quicker is a huge driver towards this type of mechanisation.

The classic example is China, where there was essentially no mini excavator market 20 years ago, but now sales are in excess of 60,000 machines per year. That makes it the single biggest mini excavator market in the world – although if Europe were taken as a whole, it would be a bigger market.

In developed markets, rental companies are major – sometimes dominant – buyers of mini excavators. Across Europe for example, OHR says some 55% of all mini excavator sales are to rental companies – currently around 37,500 machines per year out of the total regional market of 68,500 units. In the UK, which has the highest rental penetration in Europe, perhaps the world, the proportion is 85%.



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## STAND-ON SKID STEERS







**Kobelco's prototype 17SR electric mini excavator was displayed at Bauma 2019**

Two Japanese equipment manufacturers have electric mini excavators in the pipeline.

Kobelco Construction Machinery's European arm (KCME) unveiled its electric 17SR prototype mini excavator at Bauma 2019.

The 1.7 tonne machine follows the introduction of the company's SK210HLC-10 Hybrid excavator three years ago and is the result of a research and development partnership with German engine manufacturer Deutz, which is supplying the electric drive technology.

KCME Managing Director Makoto Kato said, "The Kobelco Electric powered 17SR will be our first fully-electric mini excavator, which we believe will be a popular choice for urban and small construction jobsites in the very near future."

The 17SR is expected to become commercially available in Europe in 2021.

### In the pipeline

Meanwhile, Kubota recently unveiled its own prototype electric mini excavator in Japan.

The company said it has developed the battery-powered machine in response to the global shift

## Role models in electric

Here are examples of what some of the top equipment manufacturers are offering in terms of emission-saving electric excavators.

<b>CATERPILLAR</b>	<b>300.9D VPS with HPU300</b> (offers choice of diesel or electric power)
<b>DOOSAN BOBCAT</b>	<b>E10e</b>
<b>HITACHI CONSTRUCTION MACHINERY (EUROPE)</b>	<b>ZE19 and ZE35</b>
<b>JCB</b>	<b>19C-1E</b>
<b>KOBELCO</b>	<b>17SR prototype</b>
<b>KUBOTA</b>	<b>Prototype electric mini excavator</b> (Also has the prototype KX019-4 liquified petroleum gas mini excavator)
<b>VOLVO CE</b>	<b>EC25 Electric</b>
<b>YANMAR</b>	<b>eFuzion concept</b>

“ Demand is being driven by those that need to meet emission regulations and lower noise output ”

towards electric vehicles, particularly in Europe where there are calls to ban diesel engines.

Although the prototype is still being tested and is not ready for commercial production, it will be powered by lithium-ion batteries and have an equivalent output to that of its diesel-powered counterpart.

Glen Hampson, Business Development Manager at Kubota UK, told *IRN*, "We have seen some interest from rental companies following the

launch of our electric prototype excavator. However, having said that, it's still early days. There's still a lot of work to do behind the scenes, to ensure the electric model lives up to our high-quality standards."

When asked how rental companies can justify the higher cost of such equipment, Hampson said, "It's true that electric excavators are likely to carry a higher cost. And because of this they probably won't be for everyone.

"But there is an undeniable global shift towards electric vehicles. Demand is being driven by those that need to meet emission regulations and lower noise output. These will be the key points that rental companies can use to justify the higher cost."

At the same time, Kubota is continuing to develop an alternative fuel model using liquefied petroleum gas (LPG), which is due to be launched this year. Commercial production of the KX019-4 LPG is set for 2021.

## Lift The Future

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The CX130D is one of 34 Case excavators now in B&W Plant Hire's rental fleet

## B&W Plant Hire expands Case fleet

UK-based B&W Plant Hire recently expanded its fleet of Case excavators to 34 units as part of a decision to diversify its machine offering.

The rental company, which began investing in Case in 2018, said it had even replaced other excavator brands with Case models after trialling the machines through its local dealer, Dennis Barnfield, and being pleased with the strength and power of the excavators.

Andrew Partington, B&W Plant Hire General Manager, said, "We describe these machines as 'bullet-proof'. They really are incredibly strong and very well made. When you're working in the plant hire industry, your machines are put through a lot; you need reliability and a low total cost of ownership."

Anthony Bouvié, Business Director Northern Europe for Case Construction Equipment, said, "We are always delighted when customers take a Case machine following a trial. It allows customers to see the power and efficiency the machines deliver prior to purchase. We hope to see B&W Plant Hire continue to expand their fleet in the future."

In 2016, Caterpillar introduced the 300.9D VPS mini excavator with HPU300, which offers Dual Mode Selection for a choice of diesel or electric power. Although the manufacturer could not comment on any ongoing product developments regarding electric models, the company's Global Commercial Manager for Mini Excavators, Sam Mottram, told *IRN* about the roll-out of Caterpillar's Next Generation excavator line-up, which began in February 2019.

### Entering a new class

The latest addition is the Cat 306, which marks the company's entry into the 6-tonne class.

Mottram said, "The 6-tonne size class is experiencing growth in many regions as it fits a gap between the often utilised 8-tonne and the 5-tonne machines. This new segment could provide rental

### The Cat 306 is the latest model to be rolled out in Caterpillar's Next Generation line-up

companies with a revenue opportunity for users that do not require a full 8-tonne machine because of size constraints and where a 5-tonne machine does not meet their performance needs for digging and lifting."

There are two versions of the model: the Cat 306 CR, which is available in Europe, North America, Australia and New Zealand, and the Cat 306.5, which has a fixed boom and is available in China, Southeast Asia, South America, Africa, Eurasia and the Middle East.

With its 3.5 tonnes lifting capacity at a 3m radius, the model will be part of Cat dealers' rental fleets.

"The new features in the next generation mini excavators have been very well received by rental



customers," Mottram said, "Where labour is in short supply and learning time is limited, features like stick steer, cruise control and the hydraulics settings in the new monitor will ensure that operators are able to quickly gain efficiency." **IRN**

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## Show details

**WHAT:** North America's largest construction trade show representing asphalt, aggregates, concrete, earthmoving, lifting, mining, utilities and more

**WHEN:** 10 to 14 March, 2020

**WHERE:** Las Vegas, Nevada, US

**SHOW HOURS:** Tuesday to Friday: 09:00 to 17:00; Saturday: 09:00 to 15:00

**REGISTRATION:** To register for a badge, purchase education or to book a hotel room, see: [www.conexpoconagg.com/visit/registration-and-pricing](http://www.conexpoconagg.com/visit/registration-and-pricing). The advance price deadline is 9 March 2020. Standard pricing begins 10 March 2020

**FREQUENTLY ASKED QUESTIONS:** [www.conexpoconagg.com/visit/attendee-faq](http://www.conexpoconagg.com/visit/attendee-faq)



ConExpo is the biggest construction equipment trade show in North America



# Las Vegas launches

We take a look at some of the new equipment to keep an eye out for at North America's largest equipment show, ConExpo 2020, taking place in Las Vegas, US

Following our show guide in the combined January-February issue, we bring you some last-minute news about equipment launches to look out for at this year's ConExpo show in Las Vegas, US.

**VOLVO CONSTRUCTION EQUIPMENT (CE)** will be displaying in excess of 30 machines with more than 30 different attachments, plus related uptime and productivity services, on its 5,574m<sup>2</sup> stand (F3432), in the outdoor Festival Grounds. The manufacturer will be joined by its sister companies Volvo Penta, Volvo Trucks and Volvo Financial Services, and its other equipment brands Terex Trucks and SDLG will also be present at the show.

Melker Jernberg, President of Volvo CE, said, "Our presence at ConExpo is set to be our best yet, with a fully immersive technology experience to highlight the changing face of construction."

At the compact end of the spectrum, visitors can get experience operating Volvo CE's electric compact machines, the L25H loader and ECR25 excavator.

Attendees will also be offered hands-on demonstrations of Volvo Assist technologies, which now come as standard on many products.

Volvo's excavators will be front and centre on the booth, including the new EC300E hybrid excavator, which will be making its North American debut.

The EC300E hybrid is said to reduce fuel consumption by up to 15%. It takes 'free' energy generated by the boom-down motion and uses it to charge an energy-storing accumulator and thereby relieve the torque requirement from the engine. The hybrid model promises the same levels of controllability and performance as the standard EC300E.

Volvo will also reveal two new concept models

that demonstrate where the company is taking connected, electric and autonomous machines – so that is certainly something to look out for.

On stand N10825, **KOMATSU AMERICA** will be focusing on making connections through various programmes, such as MyKomatsu, Komatsu Financial and the company's Business Solutions Group.

Among the equipment on display will be a range of excavators, including the PC238USLC-11, PC290LCi-11, PC360LCi-121, PC490LCi-11 and PC1250-11. The PC290LCi and PC490LCi are not yet available to buy, but the PC290LCi will become available later this year.

**JOHN DEERE POWER SYSTEMS** will be exhibiting its latest engine, the 13.6 litre PowerTech, on stand 139 in Hall A4 at this year's ConExpo.

The engine was developed from scratch so that new technologies could easily be incorporated. This approach was said to have resulted in an engine that delivers new levels of performance, flexibility and serviceability.

The company will also

## Champagne & Strawberries

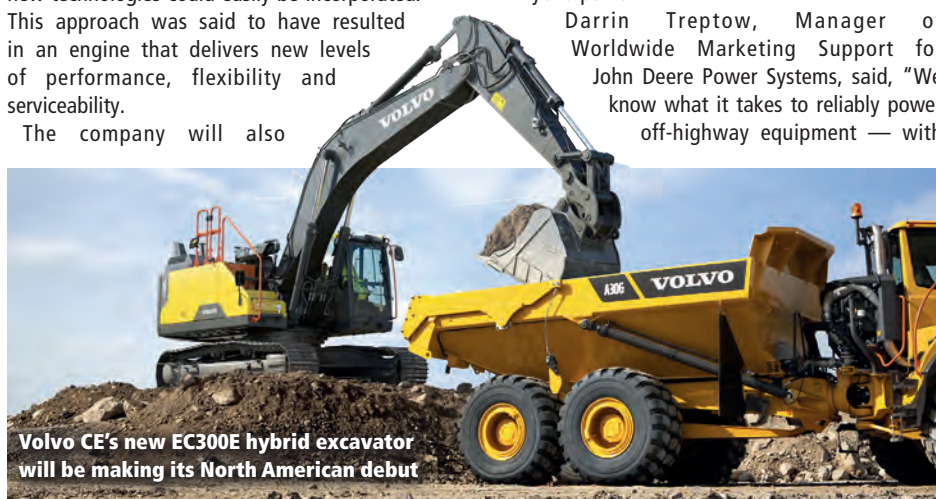
IRN, part of the KHL Group, will be exhibiting at stand S5998 in Silver Lots 1-2.

You are invited to KHL's popular Champaign and Strawberries event at the stand on Thursday 12 March, at 3.00pm, giving you the chance to network with industry colleagues.



be showcasing its newest electric drivetrain components for the first time in North America. They are designed to meet the demands of the rugged off-highway market and provide durability while giving customers the flexibility to implement hybrid power.

Darrin Treptow, Manager of Worldwide Marketing Support for John Deere Power Systems, said, "We know what it takes to reliably power off-highway equipment — with



Volvo CE's new EC300E hybrid excavator will be making its North American debut



diesel, electric or hybrid power — and we leveraged that expertise to create solutions to meet our customers' application and business needs."

Along with the 13.6 litre engine and the electric drivetrain components — which include EMD-100 electric motor drives, a GPD-200 generator pump drive, an EPD-200 electric pump drive and a PD400 dual inverter — John Deere will also showcase its line-up of 4.5 litre PSS and PWL, 6.8 litre PTE and

PVS, and 9 litre PSS engines.

Material handling equipment specialist **PETTIBONE** will be introducing its new Traverse T1246X telehandler on stand N11265.

The T1246X, which is now in production, is the third traverse telehandler launched in the company's X-Series line-up.

According to Pettibone, the new model is the only new telehandler on the market with an extendable, traversing boom that moves loads by travelling horizontally. Up to 178cm of horizontal boom transfer allows contractors to land loads at the specified lift height and without having to co-ordinate multiple boom functions.

The Traverse T1246X offers a maximum lift height of just over 14m and up to 5,440kg of lift capacity.

### Flagship models

Fascan International, the American dealer of mini crane manufacturer **JEKKO**, will participate in this year's ConExpo show and at its stand (F4569-4346) the firm will showcase a selection of Jekko cranes.

The flagship model of its SPX line, the SPX532, will be on display, featuring a new stabilising system, a new electronic and hydraulic system, and a new radio remote control.

The model, which was said to be well suited to confined spaces, has a lifting capacity of 2.9 tonnes and can reach a maximum height of 17.3m. Its jib can be stored either at rest on the column, on the ground or under the main arm.

Jekko's JF545 articulated crawler mini crane will also be exhibited. Said to combine the advantages

The flagship model of Jekko's SPX line, the SPX532, will be on display



of an articulated truck crane with the compactness and manoeuvrability of a mini crane, it has a lifting capacity of 14 tonnes and vertical reach of 30m.

German access equipment supplier **TEUPEN** will be presenting the latest developments of its LEOGTplus articulated spider lift family.

Ranging from 34 to 38m, the family has had its platform capacity increased to 400kg and its boom redesigned to offer greater reach. The newly designed jib allows the basket to be rotated 220° in both directions.

The updated LEOGTplus models now have a radio remote control with a two-line display that shows fuel levels, platform load and load limit. The radio remote control is equipped with a start/stop device for the engine.

For the first time, **PRINOTH** will have a second stand at ConExpo. In addition to its stand in the Central Hall (C2231), the company will also have a stand >

## Off-Highway GLOBAL BRIEFING

### Off-Highway Global Briefing

Tickets are now available for the Off-Highway Global Briefing, which will take place on the Wednesday of ConExpo 2020.

Speakers at the breakfast briefing on Wednesday 11 March will include Chris Sleight, Managing Director of Off Highway Research (OHR), who will present the latest regional and global trends for the industry. He will be joined by Scott Hazelton, Managing Director of Construction Consulting at IHS Markit, who will discuss the underlying drivers for the equipment industry worldwide, and Alex Woodrow, Managing Director of Knibb Gormezano Partners, who will discuss technical and regulatory changes for the industry.

The event will be held in meeting room N257, with breakfast available from 7.30am and presentations starting at 8.00am. The event will finish by 10.00am.

Details of the event are available at [www.offhighwaybriefing.com](http://www.offhighwaybriefing.com)

Pettibone will be introducing its new Traverse T1246X telehandler on stand N11265



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Prinoth's biggest dumper model, the Panther T16, will be on show

(F3263) in the Festival Grounds, showcasing its rental solutions.

The Italian manufacturer will display its largest dumper model, the Panther T16, equipped with a dump box, plus the Panther T6 with an operator cab.

Available for rental throughout the US and Canada, both machines promise high productivity, minimised fuel consumption and good reliability.

On its stand in the Central Hall, Prinoth will be displaying its Panther T7R crawler carrier with a Stage V engine, which was launched in early 2019.

### World-first

**HILTI** will be introducing what it claims to be the world's first cordless breaker, the TE 500-A36.

Engineered specifically for breaking concrete and masonry, it offers the power of a corded breaker with the added benefit of greater mobility. The breaker is powered by a 36V 9ah lithium-ion battery and a high-efficiency brushless motor.

Rafael Garcia, Senior Vice President of Marketing at Hilti North America, said, "We're at the forefront of delivering cordless tools strong enough to take on the most challenging applications without sacrificing performance or ergonomics."

The tool includes Hilti's Active Vibration Reduction (AVR) technology, which reduces the tool's triaxial vibration by more than 30% compared to models from competitors, according to the company.

It can be paired with the manufacturer's VC

75-A22 cordless backpack vacuum system for both a cordless and dustless solution.

The TE 500-A36 will be available throughout the US and Canada.

The launch of this cordless breaker comes shortly after Hilti introduced its first cordless chipper, the TE 300-A36, which was launched at

World of Concrete 2019.

US-based **A1A SOFTWARE** will be showcasing a recently released product, the company's first mobile App for its iCraneTrax fleet management software, which has Customer Relationship Management, dispatch and GPS capabilities.

With the iTeleTrax App, customers are given access to six information pages via their Apple or Android device, making it easier for operators, technicians and fleet managers to see critical machine information remotely.

Tawnia Weiss, President of A1A Software, said of the new App, "iTeleTrax improves communication between job site personnel, dispatch and service departments, increasing the opportunity for proactive maintenance."

The information provided includes an overview of a fleet's key service items, engine hours and maintenance requirements, as well as equipment location.

**IRN**



## Coronavirus reassurance

Despite the growing number of coronavirus cases globally, the organisers of the Conexpo construction exhibition have reported that the show will proceed as normal.

Conexpo is expected to attract a global audience of approximately 120,000 people.

The Association of Equipment Manufacturers (AEM), which is organising the event, has issued the following statement:

"Our foremost priority is focused on the health and safety of all participants at Conexpo-Con/Agg & IFPE 2020, including attendees, exhibitors, vendors, staff, and others involved in the show.

"We are closely monitoring the Novel Coronavirus and following guidelines that are provided by the Centers for Disease Control and Prevention (CDC). We are in communication with international organizations that have been impacted by the travel restrictions. Our plans to hold a successful CONEXPO-CON/AGG & IFPE have not changed."

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# High plateau

**Despite some economic and political headwinds, and the challenge of a skills shortage, the US rental market is still going strong. It could even benefit from uncertainty in the market, Thomas Allen discovers**

**T**he past year has given the US equipment rental market reason to be positive. Demand for machines has been strong, on the whole, and fears of recession in the US economy have subsided somewhat since this time last year. And even if there were an economic downturn, it is expected that rental would continue to do well.

At this year's ARA Show, in Orlando, Florida, the American Rental Association (ARA) said rental penetration had significantly increased in the past year, with its penetration index rising from 55.9% to 56.7% between 2018 and 2019.

The reasons for the increase include uncertainty over presidential elections, which has been prompting companies to mitigate risk by renting rather than buying equipment.

In addition, the growing technical complexity of equipment is making contractors less inclined to maintain equipment in-house, choosing to have rental companies deal with that instead.

A third factor was highlighted by ARA Vice President of Government Affairs and Chief Economist, John McClelland: "We believe this increased penetration of rental equipment into the construction market is because equipment rental companies have become problem-solving companies, helping customers make more efficient business decisions and reducing the uncertainty that comes with making large capital investments in equipment. Our view is that this trend will continue for the foreseeable future."

He added, "This [increasing penetration] is one of the main factors that is keeping rental revenues growing faster than GDP and in the face of a flat outlook for construction spending."

## Healthy forecast

The ARA defines rental penetration as the proportion of construction equipment currently in use in the US that is owned by rental companies.

The association also forecast that US rental revenues would grow by 3.8% to \$58.1 billion in 2020. It projected 4.1% growth in 2021, 4.2% in 2022, and 3.5% in 2023, reaching \$65.2 billion. This is higher than the previous estimate of \$64.1 billion.

McClelland said, "We are in a fairly steady growth pattern with the chance of recession relatively low, keeping rental revenue growth moving higher throughout the forecast period."

Scott Hazelton, Managing Director of IHS Markit, the forecasting firm that partners with the ARA, added, "The good news is that the US economy will hold to a moderate growth path, and the risk of recession has fallen."

"However, the markets that equipment rental primarily serves are likely to see some challenges. The US economy continues to slow as the impetus

from tax cuts, fiscal budget stimulus and interest rate reductions all wear off."

Austin Bonnema, Commercial Business Manager of US equipment manufacturer Vermeer told *IRN* that 2019 had been a good year for the company, with increased purchases, especially at the start of the year. He described customers as bullish, requiring equipment as they chased a lot of growth opportunities.

"They were dealing with rather high utilisation and saw that as an opportunity to refresh some fleet as well as try to tackle some of that growth," Bonnema said.

## End-of-year slowdown

However, towards the end of the year the market cooled, with big players such as United Rentals and Sunbelt pulling back, specifically in the northeast; "United pulled down a couple-hundred million dollars – maybe \$300 million – and Sunbelt pulled back maybe \$100 million," Bonnema said.

He continued, "They cancelled some orders, they wanted to slow some deliveries down, as I think they were getting into their second and third quarter performance results and saw that maybe they needed to back off fleet spending a little bit."

The trend has continued into 2020. Initial discussions with some major national players have suggested they are taking a relatively conservative replacement-only approach to begin with.

"They're taking a pause to get a clear picture of where their growth opportunities are and what they need to buy to capitalise on that growth," said Bonnema.

"With independent rental firms, though, it's



probably a little bit the other way around." Encouraged by a good couple of years, they are deciding to grow their fleets.

Looking ahead, Austin said, "Overall, we're looking at this coming year as pretty flat with an optimistic outlook for independent rentals picking up a little bit more than they have in the past."

Between 20 and 30% of Vermeer's sales are to rental, and of that about 60% are to national players, with the remaining 40% going to independents.

One equipment type that has seen good growth in demand is vacuum excavators. This has been driven largely by installation work for 5G and high-speed internet networks.

"That market continues to expand at a record pace," Bonnema said, adding, "There are years of work ahead on that as well."

As alluded to by Bonnema, United Rentals is approaching 2020 with some caution. The company announced in its latest financial results that it is choosing not to increase its CapEx in the year ahead. However, the company will be maintaining the same high level of spending as last year, as the company expects to see continued growth at a slower pace.

In 2019, United invested \$2.1 billion in its fleet; in 2020, it plans to spend \$1.9 to \$2.2 billion.

**Scott Hazelton, MD of IHS Markit (Inset); John McClelland, VP of Government Affairs and Chief Economist at the ARA**







**Skyjack's stand at the ARA Show, where Malcolm Early, Vice President of Marketing, spoke with IRN**

Matthew Flannery, CEO of United, said, "Our 2020 outlook reflects the profitable growth we expect to deliver in what is forecasted to be a slower growth phase of this continuing upcycle."

The results were driven by growth in its core construction markets, although it faced challenges in industrial business.

The final quarter of 2019 showed a slowing of its growth rate, with revenues up 6.5% compared to a 16.2% increase for the full year.

### Specialty rental

However, one particularly strong area of growth for United has been its Specialty business, which now accounts for just over 23% of total revenues, generating more than \$2 billion in 2019. Specialty revenues were up 26.8% for the year.

Specialty includes trench safety, fluid solutions, tool solutions, on-site services, and power and HVAC. It is said to be a higher margin business that reduces volatility through cross-selling.

Malcolm Early, Vice President of Marketing at Skyjack, expressed similar feelings about a strong though plateauing market.

"The US rental market is positive but 2020 will be an adjustment as we come off the back of 9 to 10 years of growth. It is more of a replacement market than a growth market," he said.

Part of this is the dampening effect of an election year. Specific to the access sector, he also mentioned that confusion around the new ANSI standards, which have been delayed again, is impacting demand.

"There is also the impact from Chinese trade wars, which affects the price of steel," Early added.

When asked about the potential impact of the coronavirus on supply chains, Early said, "Skyjack will have to expect some impact from the coronavirus. It will likely affect raw material prices and the supply of components. But it's too early to quantify, and we are in the same boat as other manufacturers."

Ed Gudaitis, Vice President of the Rental Services Division at US Cat dealer Foley, spoke to IRN about the cyclicity of the economy. He said the economic crash of 2008 prompted people to rent rather than buy equipment; demand for buying equipment then



**Ed Gudaitis, Vice President of the Rental Services Division at US Cat dealer Foley**

recovered between 2011 and 2018; and most recently there has been a shift back towards rental.

"So it's kind of come full-circle," said Gudaitis, "When the crash came, people out of the game didn't want to take on the debt or they couldn't

because they weren't credit-worthy, so they would do a lot of renting and shift that risk to us. That kind of went back to buying and renting, and now it's gone back to heavy renting."

Gudaitis has been in his current role for three years. Prior to that, he was General Manager of the division for five years, and he has been with Foley for 22 years in total.

Since acquiring Cat dealer Giles & Ransome in March 2018, Foley now operates out of six depots

across New Jersey, Staten Island, New York state, northern Delaware and eastern Pennsylvania. The company has a rental fleet of about 2,400 units with an original equipment cost of approximately \$135 million, divided between Cat equipment, which makes up 65%, and allied equipment.

At the time of speaking, it was estimated that the rental division, including sales of used equipment, turned over about \$110 million in 2019. Within that, rental alone achieved revenues of \$45-47 million. As a whole, Foley turned over about \$710-720 million.

"Increasingly, we're finding that people are choosing our Rental Purchase Option (RPO) because they don't want to buy right now because of the trade war, the uncertainty of the economy, and the upcoming election," said Gudaitis.

With the RPO, customers are able to rent equipment and then put a portion of that money towards a future purchase of it.

### Investment plans

Looking ahead, Foley is planning to invest about \$35-40 million in its rental fleet in 2020, with slightly more emphasis on growth than replacement. This is lower than 2019 CapEx, which was closer to \$50 million; "This is because we think the peak in the economy is behind us," said Gudaitis.

"We just want to be a little bit cautious because the market might come down a little bit with the uncertainty of the trade war, and the politics and the elections," he added. "It'll definitely have an impact on it but how much we're not sure. So we've kind of reduced our guess for what 2020 will be. But there's plenty of equipment in the marketplace, so if it turns out that we need more, we'll just buy used equipment that's out there to fill the gaps."

Foley's average rental fleet age is around 14 months, but the company wants to age its fleet in case there is a dip in the market.

"I'm going to try to keep more of the fleet longer so if there is a softening or slowdown in two years from now, our fleet will be worth less and we'd be able to sell it into the market place without losing money. Right now, as it is, because the fleet is so young, if the economy was to stop and we had to dispose of assets that we didn't need, you potentially could lose



**There is growing demand for vacuum excavators, according to Vermeer**



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**Able Equipment's headquarters on Long Island in New York, US**

**Chris Pera, Chief Operations Officer, Able Equipment**

money selling them off because they're so new."

The target is an average age of 36 months; "At 36 months, we feel good about the value of the equipment and it's still in good shape and it probably still has warranty," said Gudaitis.

One particular challenge in the market that Gudaitis highlighted is the skills shortage.

With unemployment at just 3%, he said, "It's very hard to find quality, qualified, experienced employees to help with our growth." Foley has more than 80 employees in its rental division.

"A lot of people we hire now, in the last four or five years, we've been training and hoping that they stay," continued Gudaitis. "We try to find genuinely good people with little or no experience and then invest in them to stay, because you can't find quality people out there. And people are leaving because the job market is so strong that people are paying other people a lot more money for the same type of job."

The shortage of skilled labour was also highlighted by Able Equipment, a 26-year-old family-owned rental business based on Long Island in New York.

Chris Pera, the company's Chief Operations Officer, said, "The employee side of the business is the most difficult. So it's the continued training and employee acquisition."

Pera has more than 40 years of experience in the rental industry, including time spent with Sunbelt and Modern Equipment. He also started up High Reach Group, which he sold to Sunbelt in 2009. He joined Able Equipment three years ago.

He added, "Without hiring others from competitors, we have put a huge effort into employee education this year, and with recruiting this year as well."

For Able's 214 employees, this training ranges from internal safety training and training on the new ANSI standards, to Genie and JLG training, and sales training.

"We have not, in the history of the company, invested as much in training as we have in 2019, and I think it's been overwhelming," said Pera.

In answer to the question of how Able is sourcing new talent, Pera said, "There isn't anything we're doing that others haven't already tried. We're just trying to be diligent in going after the schools,

the technical schools, middle schools, high schools and colleges that are accredited in our industry. It's doing everything at the same time and trying to get lucky at it."

With a fleet of about 4,000 units, predominantly aerial equipment and telehandlers, Able generates annual revenues of almost \$100 million.

### Considerable growth

Able has grown considerably over the past six years; "At the end of 2019, we will have doubled the business in the space of about 3 years," said Pera.

Able acquired two companies – Mobil Lifts and Key Equipment – and opened a new location in Allentown, Pennsylvania, in 2018, bringing the firm's number of depots up to a total of six.

Commenting on how the company is opportunistic in its growth strategy, keeping an eye out for expansion opportunities along the east coast of the US, Pera said, "Our plan is to double the business again over the next three years."

He added, "The industry still lends itself to plenty of growth from the independent side of the business. So it's not all just consolidation that's helping the industry grow."

"The big players, such as United Rentals and Sunbelt, have helped professionalise the industry. And we've all mutually grown at the same time."

Adding to this, Thomas Caldaroni, who has been in the industry for 11 years and joined Able as its Chief Financial Officer in early 2019, said, "More and more people want to rent."

He echoed Gudaitis' sentiment when he said, "When companies went through a downturn, they got caught holding a bag with debt. So the rental penetration in the US has grown substantially, and it still has room to grow. We're still in a growth market."

"And even if we take a pause this year, before the election, or have a slow-down after an 11-year expansion, I think rental will still have a pretty significant growth rate compared to the rest of the industry – probably still in the 8-9% range."

"I think it's a better choice for contractors, especially the ones who survived the great recession. They're going to turn to rental and they understand the benefit of it now even more than ever."

**IRN**

**Thomas Caldaroni, Chief Financial Officer, Able Equipment**

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Generac's new Cube Hybrid has a simple control panel to make operation easy



# Innovating illumination

**As low-emission, low-noise solutions are increasingly demanded, OEMs have the challenge of providing options that also offer cost and safety benefits at the same time.**

**Katherine Weir reports**

According to Alessandro Rossi, Managing Director for Generac Mobile Products, there are two core themes that dominate the lighting tower rental sector: need and utilisation.

"With so much choice and demand, pressures are increasing for hirers to offer state-of-the-art hybrid or renewable fuel options with new product innovations," Rossi said. "This presents many challenges for hirers as they aim to meet customer need with the practicalities of specifying and managing diverse fleets with skills, knowledge, product availability and maintenance."

New for the compact market is Generac's MT1 mini lighting tower, which replaces the original non-Stage V MT1 model. Driven by a Stage V Yanmar engine, this machine is aimed at the global market.

Improvements on the old MT1 include its lightweight and compact size, better for transportation.

In response to customer requests to make the machine safer, the manual winch on the mast has been replaced with an electrically-driven mast.

Another Stage V update from Generac is the new Cube Hybrid lighting tower with twin-cylinder Stage V Kubota engine. It offers 400-hour autonomy when fully charged and fuelled. It has dry cell AGM batteries that are not subject to the same restrictions as lithium-ion batteries, meaning more units can be transported at once.

The focus with the Cube Hybrid is the UK market, but it will be marketed globally.

**Left to right: Chris Cartwright, Keith Miles, Kenny McKay, Richard Denholm, Chris Morris and Phil Winnington with Morris Site Machinery's prototype SMC TL55 Solar H2 lighting tower at the Executive Hire Show**

Also responding to market demand for alternative power sources in lighting solutions, Morris Site Machinery introduced a new hybrid lighting tower prototype, the TL55 Solar H2, at the Executive Hire Show 2020. The intention of releasing this prototype is to prompt customer feedback to help the company further develop the machine for the rental industry.

Allan Binstead, Managing Director of Morris Site Machinery, said, "Bringing a prototype to a show has been a new experience and allowed us to really understand our customers. Innovation and eco solutions are crucial for the industry and we want to be sure we're delivering the right products to suit the customer on the ground."

## Emissions vaporised

Water vapour is the only emission from the prototype's fuel cell. This additional energy source automatically kicks in to charge the batteries as required, during long winter nights and adverse weather. It is fuelled by two easily accessible hydrogen cylinders mounted within the chassis.

Managing Director of Trime UK, Paul Hay, told >



Trime saw a rise in UK demand for its hybrid and battery-powered lighting options in 2019





connectivity\_R3\_02\_20

# GENERAC®

## MOBILE



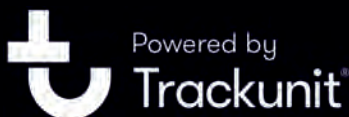
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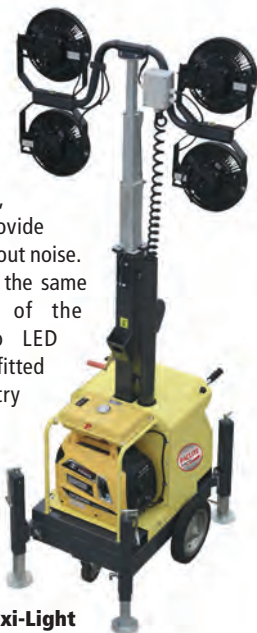


IRN, "Trime has seen a rise in demand in the UK for its hybrid and battery-powered lighting options in 2019, driven by the requirements of contractors who are influenced by legislation like low emission zones (LEZs)."

The company recently introduced its X-Eco Hybrid. The model offers extended service intervals of 500 hours and has a quiet, slow-running, water-cooled engine. It also has a light sensor that automatically switches on the lights below a certain light level. Hay highlighted this as a safety benefit since there is no need for a person to go to the unit to turn it on.

The X-Eco Hybrid is powered by a series of maintenance-free lithium batteries and a small diesel engine. The batteries take two hours to fully charge, and then they can provide eight hours of light without noise.

The X-Eco Hybrid has the same compact dimensions of the manufacturer's X-Eco LED lighting tower and is fitted with Trime's telemetry system. As standard, it also comes with the Amoss safety system, which automatically lowers the mast if the lighting set is moved



Paclite's hybrid Maxi-Light

## A light to celebrate

UK-based LED lighting manufacturer NightSearcher has launched a new floodlight to celebrate its 30<sup>th</sup> anniversary in business. The Solaris Pro is the latest addition to the Solaris floodlight range and has a 16,000 lumen output that provides a long-distance search beam to light wider areas of up to 500m.

The company said that the floodlight is easy to set up and has a multi-position 1.8m extension pole and light head for inspection of manholes, along with fold-out stabilising legs that can be used on uneven ground.

Since it has a rechargeable lithium battery, the need for cables and costly generators is removed.

The Solaris Pro has a smart control panel and the run time can be programmed for up to 24 hours, automatically setting the required light level for a given time. This model takes six hours to charge, while the Solaris Pro X takes 8 hours.

The Solaris Pro from NightSearcher



while the mast is still erected.

France-based Paclite has introduced its new hybrid Maxi-Light, which is aimed at northern markets and has four 160W LED lamps.

The company said that the model was created for 'diverse rental applications.' It can be connected to every type of power supply, including an auxiliary supply, a generator or the grid.

The Maxi-Light covers an area of 3,000m<sup>2</sup> and the LED lamps have a lifetime of more than 20,000 hours.

The lighting tower can run for eight hours with a small Paclite petrol generator.

### LED trend

Also new from Paclite is the PL2000 Eco LED lighting tower. According to the manufacturer, the

PL2000 has the lowest weight on the market at less than 750kg. It is run by a single-cylinder Hatz engine and a PMG alternator.

There is a clear shift towards LED lights, and Atlas Copco is giving users a 'cost-efficient' way to make the change from metal halide with the latest addition to its lighting tower range, the HiLight V4+. The company said that the switch to LEDs provides a brighter, safer and more productive working environment with increased lighting autonomy.

The new model has a coverage of 4,000m<sup>2</sup> and the capacity of its fuel tank has been extended to 110 litres, giving autonomy of 245 hours.

The automatic voltage regulator (AVR) on the unit's alternator was highlighted by Atlas Copco as a unique feature that improves voltage stability >

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**Atlas Copco's SmartMast technology offers both safety and cost benefits**

## Getting smart

Atlas Copco has developed a new technology named SmartMast, with inbuilt sensors that detect and respond to adverse conditions, obstacles, potential impacts and irregular ground surfaces.

The patented system is designed for use on light towers with extending hydraulic masts, and is said by Atlas Copco not only to improve site safety but also to reduce operating costs by extending autonomy due to its dimming function.

The manufacturer's HiLight B5+ light tower is the first model that the new system can be used on, with plans to offer this on other HiLight models in due course.

and operational reliability, compared to alternators regulated by capacitors.

Other key features include near-silent operation and automatic starting, provided by Atlas Copco's LC1003 Advanced Controller.

Félix Gómez, Divisional Product Marketing Manager, Light Towers at Atlas Copco, said, "The HiLight V4+ combines high-efficiency LEDs, special optics and durable construction; this offers users needing limited area coverage a cost-effective and reliable way to access the superior performance of LED lighting."

Meanwhile, Lind Equipment is giving rental companies a way of

offering three separate lighting solutions with a single lighting asset.

### Multifunctional

The Canada-based company's All-In-One Beacon LED Tower can be used as a generator- or electric- powered machine and as a no-glare diffuser lighting tower. It comes with the same features as previous models, such as 30,000 lumen weather-proof light heads, an IP65 wet-location rating, and a tough and durable exterior.



**Atlas Copco's HiLight V4+ offers coverage of 4,000m²**



**Lind Equipment's All-In-One Beacon LED Tower**

Brian Astl, President of Lind Equipment, said, "The light tower market has recently begun to make the switch to LED lighting, which shows progress. However, even for those towers that have made the switch, they still are not utilising the potential efficiency savings."

"While the lights might be more efficient than a traditional metal halide, the same oversized diesel generator is pumping out extraordinary amounts of fumes. Additionally, the weight of the generator itself would cause the trucks towing it to burn more fuel and energy just to pull it around a jobsite."

**IRN**

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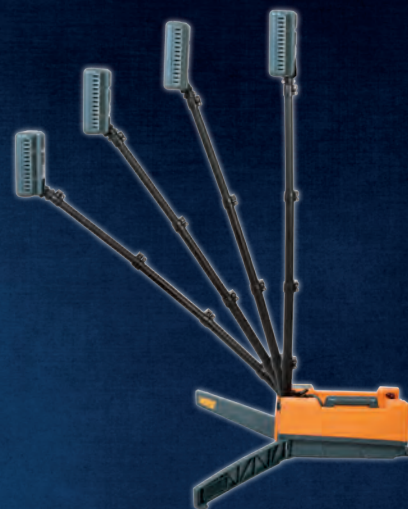
## Solaris Pro

### 16,000 lumen Rechargeable LED Floodlight

- 500 metre beam
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- Runtime 24 hours
- Compact 51cm length
- Lightweight 8kg - using lithium-ion battery
- Robust housing, IP65 rated
- Built in cable from battery pack to light head, so no trailing cables
- Built in telescopic pole which extends to 6ft/1.85m
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- 180° Swivel and tilting light head
- Built in stability legs



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**While offering a sneak peek of what to look forward to at International Rental Exhibition 2020, we also provide you with some practical information about how to register and the best way to get there**



## Message from ERA President Pierre Boels



**Pierre Boels**, President of the European Rental Association (ERA), which represents more than 5,000 equipment rental companies in Europe, has encouraged people connected to the rental industry to visit Maastricht

in June for the International Rental Exhibition, APEX aerial platform show, the ERA's annual convention and the European Rental Awards.

"The several thousand visitors to APEX and IRE will be able to visit both exhibitions," Boels says. "This combination – supplemented with our annual convention – provides a unique opportunity for rental companies to meet equipment manufacturers and other suppliers to the rental industry and to discover new equipment and services all under one roof in only three days."

This year's ERA Convention will be held on 10 and 11 June at the MECC venue and is expected to attract several hundred leaders of rental companies from across Europe, representatives of national rental associations and suppliers to the industry.

The European Rental Awards dinner will be held in the evening on 10 June.

Boels says, "Considering the encouraging growth of the European rental industry despite challenging economic circumstances, and the more confident outlook across equipment rental companies reflected in the increase in investment in rental equipment, I can thus only encourage you to consider visiting the IRE show and the ERA Convention."

# Excitement

## INTERNATIONAL RENTAL EXHIBITION (IRE)

The International Rental Exhibition (IRE) 2020 will be taking place at the MECC centre in Maastricht, the Netherlands, between 9 and 11 June, alongside the APEX aerial equipment show, the European Rental Association's (ERA) annual convention and the European Rental Awards. With so much going on in one place, this event is not to be missed.

To give you a taste of what will be on show, **ATLAS COPCO POWER TECHNIQUE** is set to exhibit its first ever battery-powered LED light tower, the compact HiLight Z3+, alongside a selection of products including WEDA pumps and portable compressors.

The HiLight Z3+ is powered by lithium-ion batteries and has a run time of up to 32 hours. In comparison to lead-acid and gel battery types, it offers up to 20% more Depth of Discharge (DoD), three times more energy density and a lifetime of 6,000 cycles. The tower's charging time, from auxiliary, grid or a portable generator, is six hours.

The tower uses a high-luminosity lamp comprising four 160W LEDs, with a life expectancy of 50,000 hours. Combined with specially designed directional glass optics, the floodlights provide light distribution over a

**Atlas Copco Power Technique will be showcasing its first battery-powered LED lighting tower, the HiLight Z3+**

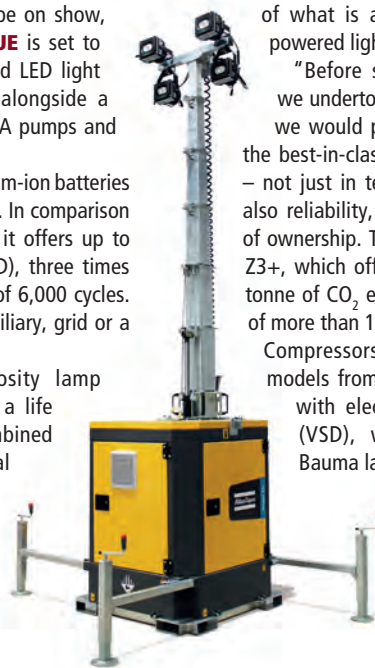
3,000m<sup>2</sup> area. The LED lights are supported by an 8m high hydraulic vertical mast, certified as stable in winds of up to 80 km/h.

At the time of the launch, Félix Gómez, Product Marketing Manager for Light Towers at Atlas Copco's Power and Flow division, said, "This launch represents a major leap forward in terms of what is achievable with a battery-powered light tower."

"Before selecting the battery type, we undertook extensive R&D to ensure we would provide our customers with the best-in-class performance they expect – not just in terms of running hours, but also reliability, ease-of-use and total cost of ownership. The end result is the HiLight Z3+, which offers a yearly reduction of 1 tonne of CO<sub>2</sub> emissions and diesel savings of more than 1,000 litres."

Compressors on display will include models from Atlas Copco's E-Air range with electric variable speed drives (VSD), which were launched at Bauma last year.

VSD E-Air compressors are smaller and lighter than equivalent diesel air compressors. The E-Air H 250, for example, weighs less than 750kg, which means





# is building

it requires no special driving licence to tow it in Europe.

Also on show will be a selection of its WEDA electric submersible pumps.

Meanwhile, Germany-based compressor specialist **KAESER** will use IRE to showcase emission-free and low-emission Mobilair portable compressors, as well as new options available for telematic integration.

Kaeser said models from its e-power series are increasingly being used on sites where there is a 400V power supply available. Advantages include quiet, emission-free operation and the use of low-maintenance electric drives.

Where there is no available power, its low-emission Mobilair models M20 to M500-2 are suitable, using EU Stage V diesel engines.

The M50E PE, among others, will be on show. This compressor has a 25kW Siemens e-power drive and delivers 5m<sup>3</sup>/min of compressed air at 7 bar.

Also displayed will be the M59PE, which features a



**Among the Mobilair portable compressors displayed by Kaeser will be the M50 E PE**

Hatz diesel engine and variable pressure adjustment up to 14 bar. The towable version will be of particular interest to rental companies.

More product updates from IRE will be available in our Show Guide in the combined April-May issue of *IRN*.

## APEX AERIAL PLATFORM EXHIBITION

In the exhibition space adjoining IRE at the MECC venue, the APEX aerial platform show will be taking place simultaneously.

Examples of what will be on show include models from the complete range offered by France-based **ATN**, which was acquired by Fassi Group in 2018. The only exception is the company's hydraulically-driven vertical masts; "These are being replaced

more and more in Europe by full-electric drive machines," said a spokesperson from ATN.

The electric drive Piaf 13 RE mast lift will be on display. The model's 6.05m working height makes it competitive in the electric articulated boom market, said the company, with the additional benefit of a compact chassis. It will be joined by the track-mounted Piaf 810 vertical mast, designed to work inside and outside on slopes of 5°.

The company will also show the 16m working height Zebra 16 Stab articulated boom on its stand (number 220). It has a 9.4m horizontal reach and is able to work on slopes of up to 19°, with the use of its outriggers.

ATN's largest diesel scissor platform, the 15m working height rough terrain CX 15, with double extension deck, will be on the manufacturer's stand too, as will the Mygale 23 hybrid tracked platform, with diesel or plug-in power options. It is designed to have a fast lift speed of 1 minute and 30 seconds to its full 23m working height.

Also at this year's APEX, **RUTHMANN** will launch a large truck mount.

While the manufacturer is not sharing any details about the new machine yet, it said it results from a greater demand worldwide for truck-mounted platforms with working heights above 50m. The reason for this lies in health and safety, according to the company, as truck mounts replace large self-propelled machines and can offer a better return on investment (ROI), as well as there being a greater need for them in the growing wind power sector.

Ruthmann's most recent large working height launches were the 90m Sky performance Steiger T 900 HF at Intermat in Paris, in 2018, and the 75m Highflex Steiger T 750 HF at Bauma last year. ➤

**The Piaf 13 RE mast lift will be shown by ATN**

## How to register

### INTERNATIONAL RENTAL EXHIBITION (IRE)

There is free registration at the show website: **www.IREshow.com**

A ticket for IRE will give you free entry to the adjoining APEX aerial platform exhibition, via open walkways. There will be a charge for delegates registering on the day of the show, so advance registration is advised.

### APEX AERIAL PLATFORM SHOW

Likewise, there is free registration at the APEX website – **www.APEXshow.com** – and a ticket for APEX will give you free entry to IRE. Again, advance registration is a benefit because there will be a charge for registering on the day of the show.

### EUROPEAN RENTAL ASSOCIATION CONVENTION

The ERA's Convention will take place on 10 and 11 January. It is a rental 'Davos', with presentations from senior figures in the rental industry and workshops on issues including sustainability, fleet management, technology and rental promotion. The full programme will be available on the ERA website soon.

This event is open to all, costing **€300** for ERA members and **€800** for non-members.

Check the ERA's website at [www.erarental.org](http://www.erarental.org) if you are not sure if you are a member. Note that members of a national association that is affiliated to ERA (such as HAE, DLR, Assodimi, bbi, etc.) are entitled to the ERA member rate.

In addition, exhibitors at IRE and APEX, companies shortlisted for the rental awards, and sponsors of the awards, get the ERA member rate. Register at: **<https://erarental.org/en/events/convention/era-convention-2020>**

Contact the ERA's secretariat by e-mail on **[era@erarental.org](mailto:era@erarental.org)** for further details.

### EUROPEAN RENTAL AWARDS

The European Rental Awards will take place on the evening of 10 June, at the same MECC venue as IRE, APEX and the ERA Convention.

You can register for the dinner as part of the ERA Convention (at the same website). You can also register for only the awards dinner.

The price for the dinner is **€200**, although companies shortlisted in the awards get two free tickets.

For more details on the awards, visit **[www.khl.com/rentalawards](http://www.khl.com/rentalawards)**

**This year, the event moves to the MECC center in Maastricht, the Netherlands**





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**Ruthmann has noted a growing demand for truck-mounted platforms with working heights above 50m. Pictured is the Steiger T 900 HF**

Both offer the Dynamic Reach System (DRS), with its Dual Concept function, which provides up to 4m more outreach than previous Highflex models. The DRS can be retrofitted to the existing T 510 HF, T 570 HF and T 650 HF models.

A company spokesperson said, "The objective in developing the Steiger T 900 HF was not to construct a platform with a working height of over 90m but to meet the needs of the market. Customers and above all operators require a guarantee of maximum stability and flexibility." The T 900 HF offers 42m lateral outreach.

**IRN**

## Getting to the four-in-one event

Maastricht is in the southernmost part of the Netherlands, close to the national borders with Belgium and Germany.

Visitors can fly directly to Brussels (Zaventem) airport or Dusseldorf airport, where free IRE/APEX shuttle buses will operate to and from MECC Maastricht.

Amsterdam is two-and-a-half hours by car or train, and cities such as Brussels, Antwerp, Cologne, Dusseldorf, Essen, Bonn and Dortmund are all within two hours' drive or less.



### BY AIR, PLUS FREE SHUTTLE BUS

During IRE and APEX, shuttle buses will run between MECC and Brussels Zaventem Airport and Düsseldorf Airport, making it very easy to reach Maastricht.

The travel time is between one and one-and-a-half hours, depending on traffic. The shuttle bus timetables will be announced later.

In addition to this, visitors can fly to Amsterdam Schiphol Airport and rent a car or get a train to Maastricht. The train takes around two-and-a-half hours.

The following airports are all with one hour's drive of MECC Maastricht:

- Düsseldorf Airport
- Eindhoven Airport
- Brussels Charleroi Airport
- Cologne-Bonn Airport
- Brussels Zaventem (1 hour 20 minutes)



### BY CAR

Maastricht is located just off the A2 motorway, the E25 interchange (Amsterdam-Brussels) and the A79 motorway (Liège-Aachen/Cologne), and has convenient connections to European motorways. Take the Randwyck/MECC/AZM exit and follow the signs for MECC or MECC Parking.

Sample driving times from major cities include:

■ **Under 2 hours:** Brussels, Antwerp, Cologne, Bonn, Dusseldorf, Dortmund.

■ **Under 2.5 hours:** Amsterdam

■ **Under 3.5 hours:** Frankfurt, Mannheim

MECC Maastricht has ample parking facilities with a maximum walking distance of 10 minutes. Parking is free for the first half hour, thereafter it is €3 per hour, up to a maximum of €12 per 24 hours.



### BY TRAIN

Maastricht-Randwyck station is located 250m from MECC Maastricht and is part of the national and international railway network. There are frequent trains from Randwyck to Maastricht Central Station, which is also linked to the national and international railway network.

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**Safety is central to the design of dumpers, with cabs and dual-view options becoming increasingly prevalent.** Thomas Allen explores the latest developments

# Staying safe

**C**onstruction sites are inherently dangerous places, and dumpers are part of the problem. Taking as an example the UK, which is one of the most mature rental markets in the world, statistics from the Health and Safety Executive (HSE) show that between June 2016 and July 2017, site dumpers alone were responsible for eight deaths and 127 personal injury claims.

For this reason, safety is a central concern in the design of dumpers and it is driving a trend for more cabbed machines.

France-based Mecalac is among those manufacturers putting a greater emphasis on cabbed dumpers. The company launched a range of cabbed models in 2017. This was closely followed by its next-generation Shield safety packs, including features such as seatbelt warnings, a speed limiter and stop/start control, which are now included as standard on all Mecalac roll-over protection structures (ROPS).

## Latest introduction

This year, Mecalac is introducing its fixed-canopy site dumper, which aims to bridge the gap between ROPS and cabbed models.

Based on the company's MDX cabbed dumper, the new model removes the rear and sides of the cab to leave a windscreen and roof as an open-air canopy. While offering high levels of protection in the event of the machine rolling over, the design provides the operator with good visibility around the machine.

It is initially available on the 6 and 9 tonne payload models, which are both driven by a 55kW Perkins 854 IIIB-compliant engine with DPF (diesel particulate filter). They also have Mecalac's next-generation Power Brakes, driven by the main hydraulic system.

The new canopy design also includes high-visibility access steps, flashing green seatbelt beacons, LED work lights and protected taillights.

**Mecalac's MDX fixed-canopy dumper bridges the gap between ROPS and cabbed models**

The fixed canopy models can be fitted with Mecalac's Shield technology packs.

Another new model from Mecalac is the TA3SH power swivel dumper. At just over 3.9m in length and 4.4m in width, it is designed to be a versatile machine for use on small to medium jobsites – as is the case with the whole TA3 range, to which the model belongs.

**The new TA3SH from Mecalac**

Peter Bigwood, General Manager of Mecalac North America, said, "We are constantly looking for gaps in the marketplace and innovating products to meet those needs. These site dumpers deliver outstanding power and performance with the flexibility to operate in challenging areas."



The dumper's load can be rotated 90° in each direction before being tipped, reducing the need to manoeuvre the dumper, improving both productivity and safety.

The TA3SH's payload capacity is 3 tonnes, putting it towards the lower end of Mecalac's range of power swivel models, which have capacities of between 0.9 and 9 tonnes.

UK dumper manufacturer Thwaites also recognises the growing importance of cabs. The company has a new cab option that is available on its 9 tonne forward tip, 6 tonne forward tip and 6 tonne power swivel dumpers.

While the new Level 2 ROPS and FOPS (falling object protective structure) cab protects the operator, an integrated camera system also helps to protect on-site personnel around the dumper. Compliant with ISO 5006 and waterproof to IP67 rating, the camera system provides the operator with 360° visibility.

Thwaites Engineering Manager Bob McElvogue said, "The inclusion of these critical safety features will significantly reduce the risk of site incidents, accidents or near misses. Having listened carefully

**Thwaites' 6-tonne power swivel dumper is among the models to benefit from new safety features, including high-visibility steps**







Wacker Neuson's Dual View dumper has an operator control panel and seat console that can swivel 180°

180° to face the opposite direction. In this way, the operator is given a clear view of their direction of travel without having to twist their body awkwardly. This can be of particular benefit on confined jobsites and it allows the dumper to be driven without a full bucket load compromising visibility ahead.

In order to keep the environment around the skip in view, a rear-view camera can be installed as an optional extra on the three Dual View models: the DV60, DV90 and DV100. There is also the option to have a front-view camera installed.

In addition to the canopy version or fold-down ROPS, the Dual View models are also available with a cabin. A sturdy protective grating on the skip protects the operator and cabin from falling material and from slewing excavator buckets.

Spanish manufacturer Ausa also offers a dumper with a reversible driving position, which was launched at Bauma 2019.

The DR1001AHG is a 10 tonne capacity, all-terrain vehicle with a closed ROPS/FOPS cab that can rotate 180° to give the operator a better view in the direction of travel, helping to improve on-site safety.

The dumper, which has a hydrostatic transmission, is also equipped with a front camera, a seatbelt buckle sensor and a reversing alarm.

The DR1001AHG uses the same electronic components as the company's D601AHG, including ECO Mode, Smart Stop, Hill Holder, and a digital screen integrated with the dumper's telematics systems.

Although the focus for this model will be the European market, it will also be available outside of Europe.

As with much compact construction equipment, the dumper sector is exploring the possibility of electrification.

This is illustrated by Ausa's first prototype electric dumper, the D100AHA Electric, which was originally unveiled at Intermat

The DR1001AHG from Ausa



to our customers, it was important that due consideration was applied to operator ergonomics."

The side and rear glass panes are tinted to reduce solar heating inside the cab, and the 'pop-out' glazing system makes it easy to replace damaged windows.

New safety features have also been added to Thwaites' 6 and 9 tonne dumpers. These include a spring-activated hydraulic release handbrake, which automatically engages in the event of an engine stop, and improved LED road lighting housed in the mud guard. The machines are powered by Stage V engines.

## Operator comfort

Wacker Neuson's product manager for dumpers, Stefan Kurzmann, has highlighted the importance not only of safety but also operator comfort in driving the demand for cabs on dumpers.

"The demand for cabbed dumpers is increasing in Europe, not only in the UK. At the moment, Germany shows growing interest.

"The main reason is the increased safety for the operator. Furthermore, comfort also plays a role that should not be underestimated, as construction companies sometimes have difficulty recruiting and retaining employees. Providing a dumper with a cab and air conditioning helps to make work easier for the operator."

Wacker Neuson also offers a good example of another trend in the sector: reversible driving systems.

The company's Dual View dumper, which is available in payload capacities of between 6 and 10 tonnes, has an operator control panel and seat console that can swivel



The DW15e is one of two electric dumpers offered by Wacker Neuson

2018, with new features showcased at Bauma 2019.

The 1 tonne capacity D100AHA Electric dumper has an electric power unit that delivers 15kW and can last for a full working day. At the end of the day, it can be connected directly to a mains power supply for full charging in 4 to 8 hours, depending on the voltage.

A spokesperson from Ausa told *IRN*, "Rental companies and clients show interest in this type of machinery, however we will not see the majority of their fleet being electric until technology evolves enough to be able to offer lower prices."

## Going electric

Wacker Neuson offers two electric dumpers: the wheeled DW15e and the tracked DT10e.

As one of the latest additions to the company's zero emissions line-up, the DW15e has four-wheel drive and a payload of up to 1.3 tonnes. It is equipped with two independent electric motors – one for the drive system and the other for the work hydraulics – in order to better manage output demands and minimise energy consumption.

When the dumper is driving downhill, energy is recovered from the brakes to top-up the maintenance-free battery, which has an integrated charger that can be plugged into a conventional 230V socket.

Meanwhile, the DT10e electric tracked dumper has a payload capacity of 1 tonne and its compact >



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**Messersi's TC50-e  
is an electric-  
powered model**

dimensions make it suitable for indoor work since it can fit through standard doorways.

The dumper's stability is enhanced by the fact that its batteries are fitted low down in the machine.

Italian-based compact equipment manufacturer Messersi also has a new electric dumper, which stands beside the company's existing TC120-e electric dumper with a 1.2 tonne payload.

The new TC50-e tracked dumper model measures 66cm in width and has a payload capacity of 500kg. Its 28-cell lithium-iron-phosphate battery, which can last for a full working day, powers a 5.5kW electric motor that drives the open-circuit hydraulic system.

Italian Cat dealer CGT Edilizia recently added two of these electric models to its rental fleet.

Bruno Tarocco, Fleet Manager and Service Manager of CGT Edilizia, said, "Our decision to include some electric models in our fleet is part of our desire to feed the growing demand for electrification on site."

### Reducing emissions and noise

The demand for electric equipment is being fuelled by emissions and noise restriction on construction sites.

Looking ahead, Tarocco said, "Over the coming year, we plan to add at least twenty more of Messersi's diesel and electric dumpers to our fleet."

Another recent development is that Messersi's largest tracked dumper, the TC350d, is now available with a closed cab.

The 3.5 tonne capacity model is 180cm wide and has a seat and controls that can be rotated 180°.

Hinowa, another Italian manufacturer, has also developed an electric tracked dumper. The company's HS701 Lithium model is powered by a 48V lithium battery pack that can operate for a full working day on a single charge.

The battery has no memory effect, which means that it can be charged at any residual capacity without affecting the battery's life. The charging time is 1.5 hours at 230V or 45 minutes at 380V.

One key feature of this dumper is the fact that the tracks are electrically powered, meaning that the electrical energy does not need to be translated into hydraulic energy first, which can waste



**Hinowa's 700kg  
capacity HS701**

## New to market

Altrad Belle recently introduced its first dumper, the 1 tonne capacity DX 1000 Hi-Tip dumper.

The model has been in production for nine months and Altrad Belle plans to roll 300 units off the line in its first year of production. The DX 1000 is only available in the UK at present, but will be launched on the European market in a couple of years, once production capacity has been ramped up.

Ray Neilson, Managing Director of Altrad Belle, told *IRN* that the model is now Speedy Hire's standard dumper in this class, having won second place in the innovation award at the rental company's conference last year.



**Ray Neilson, Managing Director, Altrad Belle, next to the DX 1000 Hi-Tip dumper**

0.5kW of energy, according to Hinowa.

Another important feature is the fact that electric permanent magnet traction motors developed specifically for Hinowa are used in the tracks instead of traditional hydraulic ones.

This allows the tracks to run through bodies of water without any electrical problems.

The HS701 Lithium measures 75cm in width, weighs 590kg and has a maximum capacity of 700kg.

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# Striking a balance

**K**en McDougall is the new President of Skyjack, having taken over from Brad Boehler, who stepped down from the position in September last year. However, McDougall is no newcomer to the access industry and already has four years under his belt at the world's third largest access equipment manufacturer.

As much as Ken McDougall has an affinity with the access industry, he has been treading the boards at parent company Linamar since 1987, when he joined the group as a tool designer and manufacturing engineer, just months after graduating from college. The following years saw him in a range of roles on the automotive side of the business, including as director of Asia Pacific development.

McDougall joined Skyjack for the first time in the early 2000's as Vice President of Operations, in a succession role that would see him take over from then president Lloyd Spalding, who was approaching retirement. The stint lasted from 2004 to 2009, before he moved back to his automotive routes. Nevertheless, in that short period he had time to oversee the company's expansion from a scissor lift-only manufacturer, into booms and the acquisition of two telehandler lines from Carelift and Volvo.

"I didn't want to leave, it wasn't a planned thing and it wasn't my choice, it was by need of the corporation, so I went where I was needed most but I always wanted to come back," says McDougall.

The year was 2009, shortly after the start of the financial crises that hit markets worldwide. "Everything was way down, we [Skyjack] were less than half of what we had been in 2007. So, with the markets being as soft as they were, it wasn't as much of a going concern."

At the same time the automotive side of the

business was picking up steam and hit some issues that McDougall had the skill set to resolve. "A decision was made that I could add value quicker by going back and taking over some of those operations."

The ensuing years saw Brad Boehler establish himself as president of Skyjack. He stepped down from the position in September as McDougall was brought back onto the scene. Boehler had also just taken on the position of president of the International Powered Access Federation (IPAF); a role he was

also required to step down from, as those on the IPAF board must be employed by a full member Federation, as Skyjack is. To the wider industry, his effective departure from the access industry seemed very sudden.

## Integral role

"I think the world of Brad," says McDougall, "Brad played an integral role in setting our team up for the success and growth we've experienced over the past few years. He was here when I was here last and I worked with him; bringing him up through the organisation into leading engineering, which is where he was when I left, and I was very supportive of him taking over as president of Skyjack."

"Brad was looking to see what else he could do personally, to expand and grow, so I think the timing worked out. When the world heard about it, it seemed like it happened overnight but there were some conversations going around before that, so it wasn't as much of a light switch as it may have seemed."

Skyjack has been part of Linamar since 2001. "It was a local based company, just around the corner from our head office. Our CEO knew the owner and it was in a bit of financial trouble at the time; we saw some synergies and diversification. Really, we are just trying to round the company not to be 100% reliant on the global automotive market. Skyjack was a good diversification play and a great company."

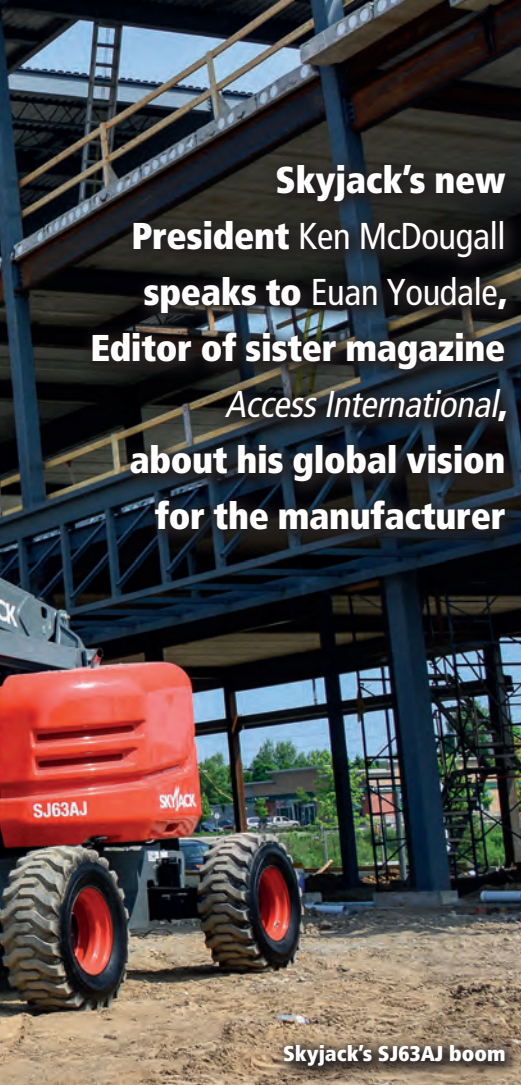
The group has continued to diversify, latterly into agricultural markets, through the acquisition of MacDon, and it recently announced it would make medical products. Skyjack is also looking to spread its wings and grow its global footprint. One of the primary reasons for McDougall's return to

The ANSI-compliant SJ3219





## Skyjack's new President Ken McDougall speaks to Euan Youdale, Editor of sister magazine *Access International*, about his global vision for the manufacturer



Skyjack's SJ63AJ boom

Skyjack was to lead that expansion with the vision of "producing in the market for the market... and probably bringing back some more automotive mentality to make it a bit more production-based."

McDougall has experience in both these areas having played an integral role in setting up Linamar's international bases, including five facilities in China, as well as overseeing its start-up plants in Mexico and a couple of its acquisitions. "I've spent time living and breathing Linamar's Mexican operations and running the facilities down there, in addition to spending quite a bit of time with our European operations."

Sales in the US are predominantly responsible for Skyjack's revenue and McDougall would like to see annual revenue dispersed far more equally between North America, Europe and Asia. Currently, some 20 to 25% of revenue comes from Europe, he says, with the plan being to improve that situation with increased products, parts and training support to bring the region up to represent a third of the business. In fact, Skyjack has already started

manufacturing equipment in Europe, as recently as last year using one of Linamar's facilities in Orosháza, Hungary, which has been expanded for that purpose and now produces two models, the SJ45 AJ and SJ51 AJ.

"Investment has been put into this area, which Brad and the team led and I will continue and see how quickly we can get that up and rolling. It will also give us a natural hedge against any currency fluctuations." There are already plans to up the production levels, with one model being added at a time as the facility develops.

### Ambitions for Asia

Skyjack has an equally ambitious goal in Asia and while the company opened an office in China in 2013 and another in Korea last year, there is a great deal still to be done.

"We have a little bit of catch up to do for sure," says McDougall. "It is a market that you cannot ignore, and we haven't ignored it, but we are definitely not in there to the capacity we'd like to be, or at the same size and breadth as the emerging OEMs coming out of China."

"The companies that already have a distribution model and network have a leg up on somebody coming in fresh, so we have to take a look at the entire market, the distribution network and pick the right path."

McDougall adds, "We have been importing equipment into the area, but the cost of imports and duty and everything else associated with that is a little prohibitive from getting us the big foothold that we would like to have."

Again, his aim is towards local production, although this time probably not directly aligned to existing Linamar plants. "We would have to take a look at economies of scale and what it takes from a timing perspective, so really we are exploring all options but with a very clear path, and a couple of things that we will be initiating this year."

Looking across the OEMs currently operating in China, they also include the large general construction manufacturers based in the country that have started up their own access divisions in very recent years. "They are serious players with a big footprint and distribution. It won't be easy but it is something that we are committed to," says McDougall,

"The best way to do that is to manufacture in the market for the market."

In the same vein, Chinese manufacturers have goals in Europe and North America and are facing similar challenges to those found by Skyjack in Asia. Nevertheless, they are already making their presence felt, which brings McDougall on to another one of his major focus points as the company's new president. "We need to be mindful of how lean we are, so that we can continue to compete and need to make sure we are doing that and maintain the high level of quality and safety."

"Any time there is more competition in the market, in general it is healthy for the market. I would not go so far as to say I am happy to see them coming but it does keep us on our toes, when it comes to our processes and getting our costs in order, because it could change the landscape of the market, and is changing the landscape of the market."

"Ten years ago, the market in general probably scoffed at some of the equipment coming out of China, but you can't do that today – they have come a long way and will continue to do so."

### Chinese producers

Nevertheless, the number of new manufacturers springing up in China is remarkable. It leads one to wonder if all these companies can survive long-term, despite the opportunities?

"As with the rental market, you have a growing number of companies and then there is a consolidation," McDougall answers, "So, I think there is a natural culling effect and I don't expect the numbers of OEMs to exponentially grow from here."

At some point it will level off and again there will be a key few, and there may be some partnerships and affiliations that are formed."

All this comes at a time when the world's two biggest markets, North America and Europe, are starting to soften. Despite that slowdown, McDougall believes Skyjack is looking at moderate growth in the months ahead, partly thanks to global expansion and he believes 2020 will be a 'cautious' year, rather than challenging. **IRN**

“The Chinese market is one that you cannot ignore, and we haven't ignored it, but we are definitely not in there to the capacity we'd like to be.”

Ken McDougall, President of Skyjack





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**Mobility solutions solve the visibility problem of mobile workforce management by connecting the field, back office and customers**

**Customer service has become a key differentiator in rental, according to Paul Whitelam, SVP Global Marketing at ClickSoftware, and central to that is the optimisation of scheduling and dispatching**

# Removing guesswork

**G**aining competitive advantage used to centre around product differentiation. While the products you rent still play an important role, the goalposts have shifted. To stand out, organisations are delivering services that exceed customer expectations, by improving the productivity and efficiency of their field forces. And this means optimising scheduling and dispatching processes.

Even the best planned schedules are disrupted. For instance, urgent issues, unexpected traffic and customer cancellations can wreak havoc on a field force's organisation. Regardless of the challenges,

scheduling and dispatching still offer the best opportunities for improved efficiency.

There are two levels to consider. The first is the automation of decision making, which improves response times and reduces overall labour costs. The second is the use of machine learning (ML) to analyse historic data to enhance predictions for optimal routing and scheduling decisions.

## Raise the productivity bar with AI

By using artificial intelligence (AI) to identify optimal resource allocation, organisations are able to dispatch jobs in a way that maximises first-time fix rates, ensuring customer satisfaction and reducing service-related costs. The ability to continually optimise a schedule as service requirements change provides many benefits. For instance, instead of leaving white space in the schedule when a customer cancels, an automated system will immediately assign an alternative task.

Another tangible benefit is the understanding of work urgency and service level agreements (SLA's). When an emergency arises, low-priority work can be rescheduled to another time within the SLA window without adversely impacting customer experience.

While optimal automation cannot happen without AI, there is an additional advantage that can be delivered through the use of ML. A type of AI, ML uses historic data to improve the quality of decision making. One of the greatest attributes of ML is its ability to process large amounts of data.

Through ML, organisations can use data about previous disruptions to help with future planning. For example, ML can analyse historical weather conditions and when there is a higher probability of snow, the system can schedule lower priority jobs to preemptively mitigate scheduling disruptions, and therefore cancellations. In this way, field service technicians encounter less downtime, fewer work disruptions, and are consistently assigned jobs that match their skill sets.

When these technologies are strategically applied to connected equipment and sensor devices, valuable data about performance, environmental conditions and more is constantly transmitted and processed. ML analyses the collected data to preemptively

identify issues before they even occur, avoiding downtime and saving time and money for businesses and customers.

Even the most experienced dispatchers and service managers have a limit to the number of variables they can consider when making scheduling decisions. With AI, calculations and changes are instantaneous, adjusting in real time to minimise disruptions and maximise the organisation's desired outcomes and key performance indicators. And the majority of these changes can be addressed in the background, without the need for human intervention.

Key to providing superior customer experiences is communication. AI enables your team to share accurate arrival times with customers, as well as send details about the technician and their real-time status and location. This keeps customers informed and eliminates variables that can result in customer no-shows and last-minute cancellations.

Finally, as the use of Internet of Things (IoT) sensors increases, field organisations can be alerted to a problem before the customer is even aware. An alert can be sent to your field service management system and the schedule is automatically adjusted to dispatch a qualified service technician, while filling in any gaps that might occur due to the schedule change.

## Removing the guesswork

Delivering on a service request means having to deal with the unexpected. Factors like last-minute cancellations, sick calls, changing weather conditions and shifting traffic patterns will always remain out of your control, and will inevitably impact field service operations. While these variables cannot be eliminated, they can be better managed through technologies like AI and ML.

The constant stream of inputs and refinements, and the feedback loop created by adherence to or deviation from the optimised routes and schedules, teaches your system to make better decisions in the future. It only stands to reason that the more data you provide, the more refined and focused your operations will be over time. The benefits of AI and ML are real and only getting better. So, what are you waiting for?

**IRN**



**PAUL WHITELAM** has more than twenty years' experience leading multinational marketing and product teams. He has worked on both the technical and business aspects of many areas that are fundamental to field service. This includes senior-level positions at Nokia (mobility and sensor technology), HERE (mapping and GIS) and Endeca (data management and analytics).

Whitelam can be contacted on 0800 092 1223





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# Looking to the future of rental

**Will rental operations of the future be subject to digital disruption or will it be business as usual? The ERA Future Group tries to answer this question, using its Futures Platform foresight radar**

**F**uture Group has been looking into the main trends that will influence the equipment rental industry in the next ten years, from social, environmental and strategic phenomena to technology, talent and the workforce, and evaluating how disruptive and how soon the impact might be.

Using the Futures Platform, an online tool that categorises trends and visualises them on a 'foresight radar', the Future Group identified a shortlist of 50 phenomena: eight of these were evaluated in a workshop at the 2019 ERA Convention and 28 were later assessed by the members of the Future Group.

Out of these 36 phenomena, technological changes were considered to be the most disruptive

and likely to have the most immediate impact, with five out of the ten most disruptive phenomena identified relating to technology and four out of those five expected to impact the industry in the next five years.

## Industrial Revolution 4.0

Adapting to the Fourth Industrial Revolution, an era of interconnectivity driven by digitalisation, robotics, automation, artificial intelligence, the internet of everything, biotechnology and big data, may be the biggest challenge facing the equipment rental industry in the immediate future.

Besides the Industrial Revolution 4.0 itself, the Future Group identified specific components of it that may have the potential to disrupt the industry: robotics and automation, AI machine learning, intelligent augmented reality and big data. Most of these could impact how the rental branch will work in the next five years.

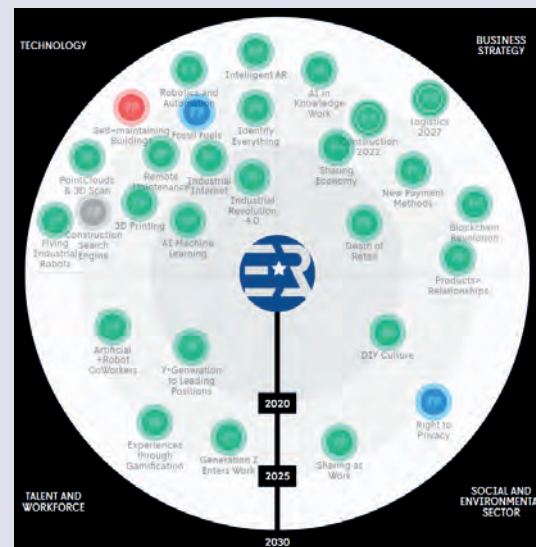
Furthermore, additional technological trends that, according to the workshop participants at the 2019 convention, may further affect the industry are Building Information Modelling (BIM), new sources of energy, electric engines, the internet

“ Five of the ten most disruptive phenomena identified relate to technology, and four out of those are expected to impact the industry in the next five years. ”

## About the Future Group

The ERA Future Group convenes young professionals from various equipment rental companies across Europe and, since 2016, has worked on a number of topics relevant to the future of rental relating to customers, people and technology. In addition to the Rental Branch of the Future, these include Customer Relationship Management software, securing talent for the future, human resources, and the impact of social media on recruitment and HR.

The Future Group is open to young managers from European rental companies, even if they are not a member of the ERA. For more information about the work of the Future Group, please contact [era@erarental.org](mailto:era@erarental.org) or visit <https://erarental.org/en/future-group>.



**The Futures Platform is an online tool that visualises trends on a foresight radar**

of things and virtual or unattended rental in cities.

In contrast, only three of the top ten phenomena were strategic (industry disruptors, changes in logistics and the sharing economy) and only two related to the workforce (Generation Z entering the workforce and artificial/robotic co-workers). Social and environmental phenomena were considered less disruptive to the industry.

## 'Smart Rental' – ERA Convention 2020

In light of the disruptive potential of technological change, as well as the potential for innovation to provide concrete benefits to the equipment rental industry, the ERA will address the topics of data and digitalisation at its 2020 Convention 'Smart Rental', being held in Maastricht, the Netherlands, on 10 and 11 June.

Forward-thinking rental companies are already taking advantage of the huge opportunities offered by new technologies and success stories demonstrate that digital technologies can provide the rental industry with a strong foundation for future success.

For the equipment rental industry to continue to thrive in the future and for the benefits of digitalisation and data to be fully realised, it is imperative to consider and discuss the full implications of technological change for the industry.

Find out more about the event here: <https://erarental.org/en/convention> **IRN**



### CONTACT ERA:

European Rental Association (ERA)  
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## About the ERA

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

Extensive information on the ERA's activities, reports and publications is available at [www.erarental.org](http://www.erarental.org)



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- General Construction Equipment Rental ☐
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- Other Specialist Rental ☐
- Manufacturer ☐
- Distributor/Agent/Equipment Sales ☐
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## 4 YOUR DETAILS

Name:

Job title:

Company:

Address:

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Country:

County/State:

Post code/Zip code:

e-mail:

## 5 Do you purchase or influence the purchase of construction equipment or rental services?

YES ☐ NO ☐

## 6 What is the annual revenue of your company (US\$ millions):

Under \$1 million ☐ \$1-3 million ☐

\$3-5 million ☐ \$5-20 million ☐

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# Metric trends

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

Values in 2019 have reflected modest softening relative to the highs observed in 2018.

The softening appeared predominately through the auction channels with retail pricing showing more moderate weakness, and in some cases flattish, with differences observed across the various products.

The softening was more noticeable across heavy earthmoving products, where both auction and retail recoveries demonstrated downward movements throughout the year.

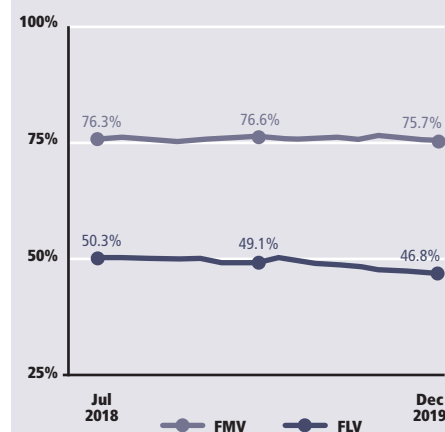
These observed trends appear to be fairly consistent across each of the core products: excavators, dozers, wheeled loaders, articulated trucks.

Within general construction products, the story has been mixed, with observed softening in the auction channels while retail activity has broadly remained steady.

Telehandlers continue to show the strongest overall recovery, while aerial products and light/medium earthmoving have been more heavily impacted.

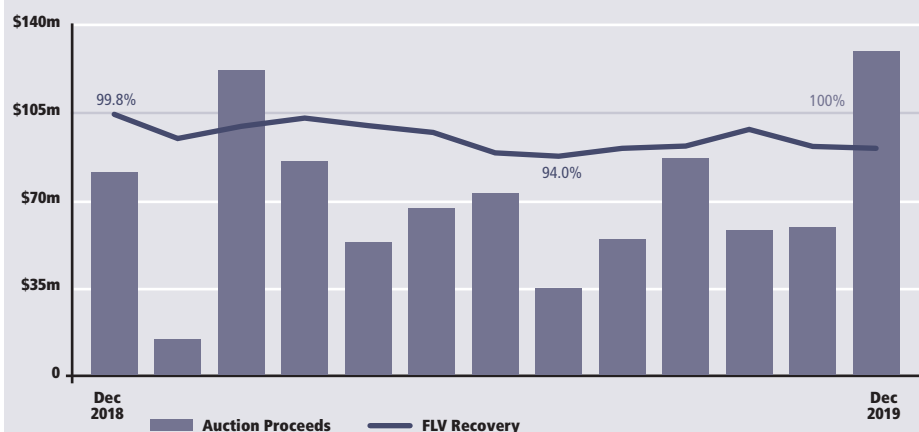
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### GENERAL CONSTRUCTION EQUIPMENT



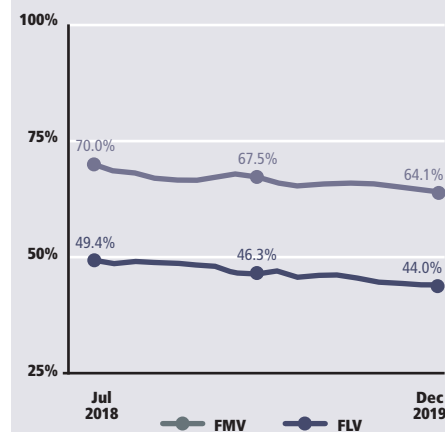
■ Retail values have shown recent softness while auction values continue to slip

### GENERAL CONSTRUCTION EQUIPMENT RESULTS



■ Auction achievements were below the prior month's market benchmark for general construction equipment and have continued to show downward pressure throughout 2019. Volume is up notably both year over year and month over month.

### HEAVY EARTHMOVING EQUIPMENT



■ Values have shown weakness in both the retail and auction channels

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.

■ For more information go to: [www.rouseservices.com](http://www.rouseservices.com)

## 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

Analytics started tracking rate data) for a basket of commonly rented items.

### Physical Utilisation

The percentage of fleet cost which is on-rent during a given period. A unit is "on-rent" if it is at a jobsite earning rental revenue.



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