

INTERNATIONAL

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# rental

NEWS

Volume 20 | Issue 7 | October-November 2020  
A KHL Group Publication

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Official magazine of the ERA



EUROPEAN  
RENTAL  
ASSOCIATION

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◀ BAUMA CHINA 2020 ▶

bauma CHINA

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## Fond farewell

**I**t feels strange to be leaving my role as Editor of *IRN* at a time of such tumult and without the chance to bid farewell to people face-to-face.

As I go on to pursue my passion for woodlands, beginning a woodsman's apprenticeship in just a few days – I'll be living in a shepherd's hut in the woods by the time you read this – it would be nice to give thanks in person to the individuals I've enjoyed working alongside over the past few years, at KHL and in the wider construction industry.

During my time on *IRN*, it has been fascinating to learn about such a diverse and dynamic sector that plays an increasingly critical role, not only by providing support during the current global health crisis but also in the longer term as part of the solution to the issue of climate change, since rental can offer a more environmentally friendly solution than ownership.

Sustainability is an issue close to my heart – hence my move into sustainable woodland management – and so I find it encouraging to see the rental model being adopted ever more widely.

Similarly, it is good to see companies like Off Grid Energy – interviewed on page 15 – enabling the shift towards renewable energy in the construction industry. Rental has turned out to be an essential ingredient in the company's recipe for success.

Although this pandemic is taking its toll, I am sure that rental will come out the other side stronger. There are glimmers of hope for next year in the Q3 ERA/*IRN* RentalTracker results (page 19), but what is more, in the longer-term, construction companies will likely turn away from ownership and towards rental as they recognise the benefits it offers – among them, flexibility.

I would like to give special thanks to Murray Pollok, the Managing Editor of *IRN*, who, with his encyclopaedic knowledge of the sector, has provided invaluable guidance during my time as Editor. He will be your contact for editorial matters until a new editor is appointed.

My successor will, I am sure, have the enjoyable task of reporting on a sector as it rises from the ashes.

I wish them – and you – all the best,

**Thomas Allen**

Editor

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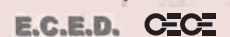
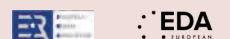
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**REGULARS****NEWS**

HSS to close 134 depots in digital shift; Ritchie Bros. acquires Rouse Services; ERA estimates 10.4% rental drop in 2020; McDonnell steps down as United Rentals CCO.

**THE APPLETON COLUMN**

Kevin Appleton suggests some new names and business models could emerge in a post-Covid-restricted economy.

**ERA PAGE**

The European Rental Association reports growth across the board in its latest ERA Market Report.

**EVENTS****PROGRAMME: IRC**

The International Rental Conference, held the day before Bauma China, will predominantly be a Chinese event.

**GUIDE: BAUMA CHINA**

The construction industry will be keen to see how Bauma China pans out, since most other trade shows around the world have been postponed due to the Covid-19 pandemic.

**KHL Group on the web**

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

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Danny Jones, Technical Director of Off Grid Energy, explains how cross rental has become a key part of its business model.

**ERA/IRN RENTALTRACKER**

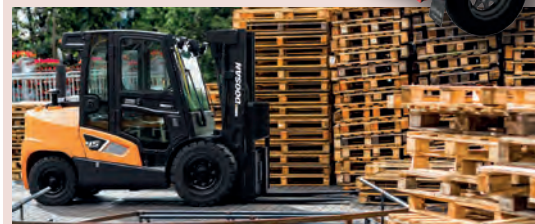
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Despite the lingering uncertainty caused by the Covid-19 pandemic, there are glimmers of hope for European rental firms.

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**...outside**

Snorkel's new  
SR1065 telehandler,  
see p.28





## DIARY DATES

2020

## INTERNATIONAL RENTAL CONFERENCE (IRC)

23 November, 2020  
Shanghai, China

## BAUMA CHINA 2020

24-27 November, 2020  
Shanghai, China

2021

## SAMOTER

3-7 March, 2021  
Verona, Italy

## IAPA AWARDS

18 March, 2021  
ONLINE

## IPAF SUMMIT

18 March, 2021  
ONLINE

## INTERMAT

19-24 April, 2021  
Paris, France

## EXECUTIVE HIRE SHOW

28-29 April, 2021  
Coventry, UK

# HSS to close 134 depots in digital shift



HSS Hire has been prompted by the Covid-19 pandemic to accelerate its digital strategy, which will lead to the closure of 134 of its 240 depots and the redundancy of 300 staff.

The UK-based rental company saw its revenues drop by 22% to £126 million in the first half of 2020, compared to the same period in the previous year.

It also made a pre-tax loss of £12.9 million in the six months to the end of June.

At the peak of the pandemic, HSS Hire closed its entire depot network, furloughed 60% of its staff and moved to a delivery only operation through its network of customer distribution centres and its OneCall rehire business. The majority of the depots remain closed.

But the closures were said not to be having a significant impact on levels

of trading. HSS Hire says customers have been placing orders through digital channels, over the phone and by e-mail, and these have then been fulfilled through deliveries or Click-and-Collect.

Approximately 30% of all new contracts are now raised through digital channels.

"This shift away from branches for both ordering and fulfilment is an acceleration of changes in customer behaviour that we have witnessed over several years," the company said in a statement.

In the second quarter of 2020, revenues dropped to 63% of the levels seen in 2019 but have recovered in September to more than 90% of last year's levels.

Two thirds of the furloughed staff have now returned to work as demand has picked up.

"The pandemic has demonstrated that there is a lower cost, more agile business model for rental," the company said.

As a result, it intends to accelerate its digital strategy by making further investment in technology platforms, allowing HSS Hire to reduce its physical footprint. To this end, the company has proposed the closure of 134 of its 240 depots, which would result in the redundancy of about 300 staff.

To support this initiative, HSS Hire is partnering with regional builders merchants to maintain national coverage at lower cost. As well as giving access to more customers, this move also affords HSS Hire greater flexibility because fixed costs are replaced with variable costs.

## Ritchie Bros. acquires Rouse Services

Equipment auctioneer Ritchie Bros. has acquired used equipment and rental data specialist Rouse Services for approximately US\$275 million.

With this acquisition, Ritchie Bros. intends to expand its data and service offering.

Ann Fandozzi, CEO of Ritchie Bros., said, "Data and analytics are fundamental building blocks to deliver great customer experiences in today's world."

She added, "Rouse offers a highly complementary suite of data and service products that will continue and accelerate our evolution from an auction company to a global, trusted marketplace and provider of services."

Los Angeles based Rouse Services

offers data intelligence and benchmarking products to help its customers make decisions.

Its subscription-based revenue is generated by three data-as-a-service (DaaS) offerings: rental analytics, equipment sales support, and fleet appraisals.

Rouse Services, which has approximately 60 employees, will continue to operate as usual and will maintain its physical presence in Los Angeles, California, for the foreseeable future.

Fandozzi said, "By working together, we will be able to help

customers better understand used equipment trends and how to use them to optimise fleet management decisions. Bringing Rouse into the Ritchie Bros. family of solutions increases connectivity and deepens our already strong relationships with fleet owners and asset-backed lenders."

Under the terms of the transaction, Ritchie Bros. will acquire 100% of the equity of Rouse Services for approximately \$250 million in cash and approximately \$25 million in common stock of Ritchie Bros., subject to adjustment.

## Digitalisation in Rental



A free recording of the Digitalisation in Rental webinar – held on Tuesday 13 October – can be viewed on KHL.com. It features a discussion about the ways in which digital technologies are changing the way the rental industry works, from using artificial intelligence for fleet management to providing rental customers with online channels.

## Digital issues...

For those of you now working from home, we remind you that you can read IRN, and all other KHL titles, in digital format.

You can subscribe for free at KHL.com.

If you would like us to temporarily redirect your paper copy to a home address, we can do that. Please contact us by e-mail at: circulation@khl.com

We have a rolling news story on coronavirus on our website, providing stories and information from all over the world.

We are also producing a newsletter, Construction & Coronavirus, focusing on the impact that Covid-19 is having on construction – on sites, in factories, and in offices. Once again, you can subscribe to this on the KHL website.



Swedish OEM Volvo CE has launched a new 5 tonne zero tail-swing compact excavator. The company says the ECR50 combines ease of operation and the ability to work in confined spaces with enhanced durability. The machine measures 2,000mm in width and 5,198mm in length, and has an operating weight of 5,050kg. Its engine has a gross power of 31.2kW at 2,200rpm. The ECR50 has an in-track boom swing, which ensures the swing post and cylinder remain within the track width when digging alongside obstacles, helping to avoid damage.





## NEWS IN BRIEF

■ Caterpillar's latest financial results have revealed that the company's construction industries segment saw total sales of just over US\$4 billion in the third quarter of 2020, a decrease of US\$1.2 billion – 23% – compared to the third quarter of 2019. The only region to see sales grow was Asia Pacific, where sales increased 14% in the third quarter of this year compared to 2019. Sales in the region were driven by a strong Chinese market.

■ Two of next year's major rental trade shows have been postponed due to the Covid-19 pandemic. The American Rental Association's ARA Show 2021 has been rescheduled to 18-20 October, 2021. It was originally scheduled for February. To accommodate the shift to an autumn 2021 show, the ARA has cancelled the 2022 edition. Meanwhile, in the UK, The Executive Hire Show (EHS) has been rescheduled from February to 28-29 April, 2021, following discussions the organisers had with exhibitors, supporters and partners.

■ Boels Rental has joined the ENI (Emission-free Network Infra) Foundation, which aims to accelerate the development of zero-emission construction equipment. Boels said rental is, by definition, a sustainable solution and the firm provides an important link between manufacturers and end users. Edwin Lokkerbol, Programme Manager at ENI, said, "We are happy with Boels' membership. Boels is an important partner because we can gain practical experience in working with zero-emission equipment through pilots."

## ERA estimates 10.4% rental drop in 2020

The European Rental Association (ERA) is estimating an overall decrease of 10.4% in rental revenues in 2020 – caused by the Covid-19 pandemic – followed by a forecast rebound of 4.8% in 2021.

The association's newly published Market Report 2020 also provides the latest data on how the rental market performed in 2019, with an estimated growth of 4.1% for the 15 countries covered, equating to 27.7 billion. All 15 grew last year, the

second year running that has been the case.

The impact of the pandemic differed from one region to another, according to the report, with Nordic countries, which did not lockdown and had almost no site shutdowns, performing differently to southern Europe and the UK, which faced severe lockdowns and disruptions to activity. The UK has been further impacted by the uncertainty surrounding the Brexit negotiations.

## McDonnell steps down as United Rentals CCO

Paul McDonnell has stepped down as Chief Commercial Officer (CCO) of United Rentals, after 21 years with the company.

United's COO Dale Asplund will take on McDonnell's responsibilities with respect to sales and specialty operations, while McDonnell continues to provide advisory services in an independent capacity for 24 months.

Matthew Flannery, CEO of United Rentals, said, "We thank Paul for his significant contributions to the success of our company, both as a talented leader and a strong advocate



**Paul McDonnell,**  
outgoing CCO of  
United Rentals

for our customers.

"He led the growth of our specialty rental segment to the largest network of its kind in the world. I'm pleased that Paul will remain available to us, and I join our executive team in wishing him continued success."

United Rentals' latest financial results, for the third quarter of 2020, showed demand is now tracking to normal seasonal patterns. Revenues in the quarter came to \$2.19 billion, down 12% on to last year's \$2.49 billion. For the nine months to September 30, total revenues were down 10% compared to 2019 at \$6.25 billion.



The award categories and judging panel for the 2021 European Rental Awards are confirmed.

The event, scheduled for 16 June in Maastricht, The Netherlands, during the ERA Convention and International Rental Exhibition (IRE), is jointly organised by the ERA and IRN.

The eight award categories are:

- Large Rental Company of the Year (turnover above €15 million)
- Small Rental Company of the Year (turnover under €15 million)
- Rental Product of the Year
- ERA Technical Committee Award
- Best Safety Innovation
- Best Digital Innovation
- ERA/IRN Rental Person of the Year
- Lifetime Achievement Award

Entry forms plus award criteria will be available soon at [www.khl.com/rentalawards](http://www.khl.com/rentalawards)

No entries will be required for the ERA Technical Committee Award, which is assessed and awarded by the ERA's Technical Committee. The Best Safety Innovation award will be judged by the ERA Sustainability Committee.

The deadline for entries is Friday 12 March, 2021.

## IRN Rental Share Index

COMPANY		SHARE PRICES			
		Start date 07/01/06	Previous mth 07/09/20	Current mth 05/11/20	% change
Aggreko (UK)	£	2.75	4.33	4.66	7.6%
Ashtead Group (UK/US)	UK£	1.83	33.34	38.16	14.5%
Cramo (Fin)	€	13.0	13.23	13.23	0%
Emeco	US\$	–	0.86	0.77	-10.5%
GAM SA (Spain)	€	8	0.99	1.07	8.1%
Herc Rentals	US\$	–	42.26	47.35	12%
HSS Hire	UK£	–	26.8	20.0	-25%
H&E Equipment	US\$	–	21.36	22.51	3.4%
Kanamoto	Yen	–	2263	2181	-3.6%
Mobile Mini (US)	US\$	46.2	29.5	29.5	0%
Ramirent (Finland)	€	23.43	8.77	8.77	0%
Speedy Hire (UK)	UK£	8.32	0.52	0.55	5.7%
United Rentals (US)	US\$	24.9	176.43	191.12	8.3%
VP PLC	UK£	–	6.22	6.12	-1.6%
<b>IRN INDEX</b>		<b>100</b>	<b>416</b>	<b>457</b>	<b>9.9%</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.





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<https://bit.ly/35WUeZK>

### @PerkinsEngines

22 September, 2020



Extra day's holiday this year for employees as @JCBmachines marks its 75<sup>th</sup> birthday – a huge congratulations to them on this magnificent achievement. Do you reckon it's too late to sign up for a job?!

### @hireassociation

23 October, 2020

#DigiPLACE regional workshop continues! Challenges and opportunities of digitising European #construction industry is now discussed. Follow #DigiPLACE to stay informed.

### @Digi\_PLACE

4 November, 2020

# Loxam Powered Access CEO retiring

Don Kenny, CEO of Loxam Powered Access Division, is to retire on 31 December 2020.

Kenny joined the former Lavendon Group in 2011 as CEO before it was acquired by Loxam in 2017.

During Kenny's tenure he led the integration of Lavendon Group into Loxam Group, UK Platforms into Nationwide Platforms, and the integration of Nacanco and Nove into Loxam Access in Italy.

Kenny also pushed for the digitalisation of internal processes and customer systems.

He will be replaced by Paul Rankin, who was appointed Managing Director of Nationwide Platforms in October 2020. Rankin will also become a member of the Loxam Group Executive Committee.

Rankin was previously Managing



**Don Kenny, outgoing CEO of Loxam Powered Access Division**

Director of Rapid Access, part of the Loxam Powered Access Division, operating in the Middle East.

Kenny said, "I am confident, under Paul's leadership, the organisation will continue to flourish."

Gerard Deprez, President and CEO of Loxam, said, "I wish Don all the best for his retirement, and personally thank him for leading the development and growth of the Loxam Powered Access Division across Europe."

He added, "Paul is a natural successor with previous experience of operating in the Middle East and detailed knowledge of the powered access industry."

# Home Depot opens new rental centres

The Home Depot Rental has opened eight new rental centres following the recent opening of two new rental operations facilities.

As a result, The Home Depot now rents large equipment, tools, trucks and trailers from locations in Georgia, Arkansas, Montana, Florida, Wisconsin and Texas.

The company has plans to open additional rental centres in 2020.

"Our business is evolving," said Tony English, Senior Director, Merchandising at The Home Depot Rental. "As we observe trends in

our business – and industry – we identified an opportunity to map Rental Centres against markets in which there is a growing need.

"We're constantly testing new ways to deliver a convenient rental experience and through these facilities we can do that across locations and regions."

In 2019, The Home Depot launched the concept of rental operations facilities, through which it offers an expanded equipment portfolio only to its Pro customers, rather than the wider public.

## PEOPLE NEWS

■ Paul Gaze has been appointed as the new CEO Designate of the Hire Association Europe (HAE) and Event Hire Association (EHA), following Graham Arundell's decision earlier this year to step down from the position. Gaze started in the new role on 1 September. He originally joined HAE EHA as Commercial Manager in 2018. Since then, Gaze has put his mark on the training and skills development programmes by setting up a career path for members, widening the training offer and introducing a vocational assessment centre.

■ Gregory Bloom has been made the new Rental Manager for Xylem Africa. Heading the company's rental division in Africa, Bloom will be responsible for providing water solutions for a variety of applications. The company serves customers in a range of sectors, from construction and mining to agriculture and infrastructure. Applications include dewatering, underground drainage, fly ash removal, and sludge removal. He has been described by Xylem as 'process driven and a prolific supporter of his teams'.

■ HHH Equipment, a UK company that rents hammers and other attachments for construction equipment, has appointed Andy Martin as its new Business Development Manager. The role was created as part of the firm's growth strategy. Martin, who has 15 years of industry experience, said, "I'm excited to be joining HHH Equipment Ltd. Though we're a small passionate team, we are agile and flexible enough to grab any opportunity and grow the business."

## Rental information from IRN

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

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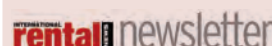
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# Haulotte opens Wuhan branch

Haulotte has opened a new branch in Wuhan, China.

The new office is part of the Haulotte China subsidiary's strategy to strengthen its presence across the country's provinces and to be closer to its customers.

Located in Wuhan Qiaokou district, Haulotte's new branch is in a convenient area for transportation and the new facility will provide Central China and western southern China with faster parts supply delivery, comprehensive training,

technical support and refurbishment options.

Harry Wang, General Manager at Haulotte Shanghai, was at the official ribbon-cutting ceremony at the new

facility. He said, "The opening marks a new chapter for us and perfectly illustrates Haulotte's commitment and confidence in the Central China market."



Haulotte  
Wuhan  
opening  
ceremony

## NEWS IN BRIEF

■ Sinoboom BV has appointed Thomas Wolke as its Regional Manager for the Nordic and Baltic region. Wolke brings with him almost 14 years' experience of supporting and working with MEWP rental companies in the region. Based in Sweden, he will take care of Sinoboom BV's business in Denmark, Finland, Sweden, Norway, Estonia, Latvia and Lithuania. "Thomas's experience and knowledge is a great asset to our team in Europe and will undoubtedly help us to rapidly build on our existing Nordic and Baltic customer base," said

Erik Geene, Vice President of Business Development at Sinoboom BV.

**Thomas Wolke,**  
Regional Manager,  
Nordic and Baltic  
region, Sinoboom



■ Senior members of the French government recently visited vehicle mount manufacturing specialist Klubb Group, where they officially launched the country's Covid-19 export recovery plan, during a round-table discussion in the factory. Klubb's factory in Ferrières-en-Brie was chosen for the meeting in recognition of the company's successful export strategy.

■ Terex Utilities has opened a new Terex Service Center in Burleson, Texas. Located 16 miles from the previous location, the new purpose-built facility offers convenient access from the I-35 highway. "It is an exciting time for Terex Services as we continue to open new facilities," said Richard Gunderman, Vice President Parts and Services, Utilities. It is 80% larger than the previous location.

## IAPAs to be held online

The International Awards for Powered Access (IAPAs) and IPAF Summit will take place as an online event.

Scheduled to be held in London, UK, on 18 March, 2021, the IAPAs and IPAF Summit will now go ahead as a purely digital event on the same date, with delegates joining online from around the world, to allow maximum certainty for those wishing to attend during the ongoing pandemic.

Event organisers IPAF and KHL Group jointly took the decision to host the event as an online-only platform as uncertainty persists surrounding measures to slow the resurgence of the virus during late 2020 and early 2021.

Peter Douglas, CEO and MD of IPAF, said, "While we hope the pandemic is under control by March, continuing international



travel restrictions, as well as local regulations in the UK concerning the number of people allowed to gather indoors, mean those hoping to attend in person cannot plan with the degree of certainty required with just five months to go until the event is scheduled to be held.

"At the same time, we are all now used to a new way of working, joining in meetings, hosting webinars, workshops and roundtable discussions online via platforms such as Teams or Zoom. We have seen how effective these can be when international travel and physical gatherings have proved impossible."

## RentEase represents Nifty Lift in India

Niftylift has appointed RentEase International as its distributor in India.

Under the agreement, RentEase, which is based in India, will provide equipment sales and rental services for Niftylift's range of access equipment across the country.

Jim Craddock, International Sales Manager for Niftylift, said, "This new arrangement will provide Niftylift with excellent market coverage and a service support network in India, whilst working with a proven market leader in the rental sector."

The manufacturer's MEWPs range from 12m to over 28m working height and include trailer mounts, self-propelled all-electric, hybrid and diesel booms, low-weight booms with outriggers, and tracked platforms.

Meghraj Singh, Managing Director of RentEase, said, "We are thrilled with the opportunity to join hands with one of the industry's leading brands and innovators."

He added, "RentEase has continually grown from its inception in 2017 and is in line with its vision to be an industry leader in India."

Mo Min, Manager of the Haulotte Wuhan branch, added, "The branch is also expected to be a gathering place for local customers, friends and industry colleagues to meet and interact with each other on a daily basis."

## NEWS IN BRIEF

■ Low level access specialist Power Towers, part of JLG Industries, has announced a new supply agreement with Boels Rental. Boels Rental is significantly expanding its low-level access offering with the Power Towers line of products designed to change the way work is done on construction fit-outs. Jonathan Dawson, Managing Director of Power Towers, said, "Great to see Power Towers growing on the continent and a partner like Boels committing to low level access and driving method change supported by the Power Towers team. The first large order is going through the new factory at 100% capacity."

■ Manitou Group is launching new compact telehandlers and backhoe loaders in the Brazilian and Latin American markets. The company aim is to gain competitiveness in the markets through the expanded product offering, including the MXT 1740 and MXT 840 P telehandlers, and a new line of backhoe loaders, the TLB 844 and 818. In addition to these new models, Manitou Group will further develop the market in Brazil by strengthening its service support operations through dealers and rental companies.

■ UK-based Nationwide Platforms has invested in 86 electric, hybrid and Stage V-compliant scissor and mast lifts from Skyjack.

The new units feature Skyjack's Secondary Guarding Lift Enable (SGLE) system and have also been fitted with Nationwide Platforms' telematics and fleet management system. The scissor lifts will also be available for rental with Nationwide's range of material handling attachments.

Don Kenny, Loxam Powered Access Division CEO, said, "We have continued to invest and innovate to ensure our customers have access to the latest selection of environmentally friendly platforms on the market."



# 150



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# Here it comes again

**As Coronavirus proves difficult to shake off and continues to shape the equipment rental industry, Kevin Appleton suggests some new names and business models could emerge in a post-Covid-restricted economy**



**T**he last few weeks have confirmed, if there was ever any doubt, that the Covid-19 virus is going to remain an unwelcome visitor at least through the coming winter and maybe well beyond. At this stage (and if we know anything now, we know it's unwise to reach conclusions based on a few weeks of experience) it seems that health systems are coping better, and hospitalisations and mortality rates are

decreasing, but we know that the system's ability to cope is extremely fragile.

Across the world, governments are striving to find a balance between not being viewed as casual about their citizens health whilst, at the same time, not wanting to irretrievably crash economies and induce a long-lasting economic depression. If there was ever a time when I couldn't want less to be a politician, this is it!

## Shifts in behaviours

For our industry there are already some observable shifts in behaviours, which have been accelerated through the first few months of Covid-19. I'd expect these to be continuing to shape the industry through the coming months.

There will be less touch and more technology. There are numerous examples (HSS in the UK being a recent one that springs to mind) where a forced reduction in numbers of branch outlets, when coupled with an acceptable online ordering capability, has meant that revenue has held up well even with a massively reduced number of operating sites. Although this was forced upon businesses by Covid-19, it seems highly likely that there will be an overall shrinking in the numbers of rental outlets and an accelerated shift to online ordering. This makes sense in an environment where non-essential contact is heavily discouraged and where people who are placing orders are very often working from home currently. The plus side is that this makes rental businesses potentially much more efficient to run.

## Rebalance

A capacity and equipment rebalance seems likely. Rental volumes, in the main, have recovered extremely well after the first impacts of Covid-19. That said, construction equipment manufacturers have been hit hard as their customers have held off capital expenditure decisions in order to conserve cash and see where things are headed. On the other side of the pandemic (meaning the point at which governments

decide we simply have to live with it at a certain level, rather than live in a permanently wounded economy and society), it's hard to see that there will be immediate demand for additional capacity in the hospitality, leisure, tourism, non-food retail, housing and some other sectors.

Conversely, there seems likely to be big investment from governments in infrastructure projects in order to try and kick-start economic activity and there will likely be increased demand for certain types of warehousing – particularly related to e-fulfilment. A strong and broad economic rebound seems unlikely, with a patchy recovery – varying widely by end sector – seeming more probable.

## Profound impacts

The impacts of these likely outcomes for the rental sector are profound. For businesses who find themselves well-invested, with good capabilities in the area of digital trading and whose end-customers are substantially in sectors that will be beneficiaries of the post-Covid-restricted economy the outlook looks very positive. This could well be a time when some new names and new business models come to our attention for the first time. As always happens, the opposite is likely also true. There will be some businesses who are carrying too much of the wrong kind of equipment and whose under-investment in digital capability will be a substantial handicap. It's like that point in a cycle road race where the peloton re-forms before a new set of breakaway leaders become visible.

So, at a strategic level, management focus now has to be on becoming as fit as possible for a post-Covid-restricted world, whilst at the same time running the business on a daily basis to exploit all available opportunities and, crucially, remaining safe for staff and customers whilst also being easy to do business with. The challenges of the last few months have been tragic for some and exhausting for most.

If ever there was a time to make sure that doing business was not adding to the exhaustion of your customers, this is that 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)



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# Breaking the ice

**Cross-rental has been an essential element of Off Grid Energy's business model. The company's Technical Director Danny Jones talks about the important role rental is playing in getting its energy storage products accepted by the market**

**W**hen it comes to introducing a new and potentially disruptive type of equipment to the construction industry, rental can help to break the ice. This is certainly the case with UK-based battery energy storage manufacturer Off Grid Energy.

In 2010, the UK government introduced a feed-in tariff scheme to incentivise people to install solar panels and wind turbines by offering to pay them for feeding excess renewable energy into the national grid. Off Grid Energy saw an opportunity to

provide energy storage units to people who were not connected to the grid and wanted to store excess electricity from renewable sources.

"We started supplying bespoke solutions to individuals like farmers, putting batteries, control gear and a management system all into a single box," says Danny Jones, the company's Technical Director. "This evolved into the factory-built, ready-to-go solution we call Gridtogo."

## Steeped in knowledge

Jones is steeped in knowledge about batteries, having spent 25 years working with micro hybrid power generation systems for marine, automotive and fixed off-grid applications, first as UK manager at Mastervolt and then as UK manager at Victron Energy.

He is also former Chairman of the British Marine Electronics Association.

Off Grid Energy then recognised that its technology could be applied to the temporary power world for construction and events. Gridtogo could be paired with a diesel generator to create a hybrid setup.

"It's classic disruptive technology," says Jones. "It's a technology that helps to reduce fuel consumption, but genset renters make money from selling fuel and renting their existing units. They're also nervous about what the new technology is and how to maintain it."

So it was out of necessity that Off Grid Energy entered the re-rental market by establishing Hybrid Power Hire in 2017.

"Our 'push-pull' marketing strategy is

based on promoting our technology to the end users, such as construction companies, event organisers and electricity companies, or influencers, such as government, local authorities and industry bodies," says Jones. "This aims to create demand because our technology feeds into their sustainability agendas."

"We then take that demand to the rental companies who are experts in delivering hire. They have the infrastructure, the capacity and the relationships – all things we cannot expect to be able to re-create without enormous investment."

## Offering support

The intention is not to compete with but to support rental companies, so Hybrid Power Hire only offers re-rental, rather than renting directly to end users. When the rental companies' customers request hybrid solutions, "this then encourages the rental companies to look to us to deliver the equipment and the expertise," says Jones.

He also mentions that this feeds into the trend for rental companies to provide solutions rather than >

## Next generation

Off Grid Energy has just launched its third-generation product line, called Gridtogo Ingenium.

It comprises three models – the SX, MX and LX – with power outputs ranging from 30 to 45kVA.

Based on Off Grid Energy's learnings over the years, these units are designed to be more powerful and resilient. They have stress-tested enclosures and simplified operator controls.

The units feature smart management technology with remote access for monitoring and control, and they are solar photovoltaic-ready.

Due to its multifunctional design, the new line was said to be adaptable to a range of applications and market sectors. And as a modular solution, a number of units can be connected together for larger-scale projects.

**The new Gridtogo Ingenium line offers outputs ranging from 30 to 45kVA**



**Danny Jones,  
Technical  
Director, Off  
Grid Energy**







**The Gridtogo units can be paired up with multiple sources of energy simultaneously, including renewables**

just equipment, since this hybrid offering is more complex than simply supplying a genset.

"The cross-hire model means that all of this is transparent, we do not undercut our rental customers, our technology gets out to the end users and we can make sure our expertise is properly deployed where it is needed. We have the technology and the know-how, the rental companies have the infrastructure, relationships and the rental expertise."

He adds, "We can concentrate on what we do well, and our rental partners can concentrate on what they do well."

Jones also points out that, in the future, rental companies may wish to invest in their own fleets of energy storage assets. If Hybrid Power Hire were seen as a competitor, rental firms would be less inclined to work with Off Grid Energy as a supplier.

60% of Off Grid Energy's output ends up in cross-rental. Of the remaining 40% that is capital sales, 40% is sold to rental companies, and that proportion is growing, according to Jones.

"When deciding on rental rates, Hybrid Power Hire has to take into account not only the cost of the asset but also the costs that could be saved by using the asset," says Jones. "In addition, the rates must make it possible for the rental companies to whom we re-rent to make a profit themselves."

Regarding the benefits to customers, the cost savings come primarily from the fact that less fuel is used, according to Jones. But he also emphasises the benefit of being able to bid for project tenders



**Aerial view of the new facility showing the 150kWp solar panels on the roof**

## On the move

Off Grid Energy and Hybrid Power Hire are in the process of moving to new premises in Rugby, UK – a move that has been delayed by the Covid-19 pandemic.

Jones says the new 2,800m<sup>2</sup> facility offers the capacity for the company to meet its growth expectations. It is divided into two units, which will help to keep the manufacturing and rental operations separate while remaining under one roof.

"The building has solar energy, so Off Grid Energy will be able to charge its new units with solar power," says Jones.

that require sustainable solutions, which is becoming increasingly common.

### Cutting emissions

Jones highlights the distinction between air pollution and CO<sub>2</sub> emissions; while CO<sub>2</sub> is a greenhouse gas, it is not an air pollutant, whereas noxious gases such as NO<sub>x</sub> and SO<sub>x</sub> are pollutants that worsen air quality. Off Grid Energy's solutions reduce both, as well as cutting noise emissions.

Another important benefit is that Off Grid Energy's units lengthen the lifespan of the generators with which they are paired.

Not only are they run for shorter periods – and therefore require less frequent maintenance – but the problem of wet stacking is also overcome.

Running gensets at low loads is a common problem since energy demands fluctuate on construction sites, and this can be damaging to the engine. What is more, this has become even more problematic with the introduction of Stage V emissions regulations because aftertreatment systems clog up at low temperatures, causing further damage to the engine.

With the hybrid system, a genset can be run at a high temperature to charge the batteries and then switched off.

In addition to this, energy from the battery system can be used to supplement that supplied by the generator to deal with peaks in power demand. This means a smaller generator can be used, further enhancing efficiency and reducing costs.

The Gridtogo units can be paired up with multiple sources of energy simultaneously, including renewables such as solar photovoltaics, wind and hydrogen.

What about the residual value of the Gridtogo units? Jones says it is difficult to know the residual values because the technology is relatively new, and the lifespan of the batteries depends on how they are used.

### Growth phase

Off Grid Energy, originally called Electro Technique before being renamed in 2010, will be celebrating its 20<sup>th</sup> anniversary next year. The company says it is entering a phase of significant growth, as concern about climate change prompts new regulations and legislation, such as Stage V and Low Emission Zones, that are driving the shift towards sustainable practices.

Although the company's focus is on the UK, where Jones says it is selling to the top 20 UK rental companies, Off Grid Energy is also selling its products into the US, EU and Australian markets.

"The American market is huge. The scale is much bigger," says Jones, adding that the company ultimately hopes to set up manufacturing in North America. "At present, our partner there is with the dealer Alliance North America (ANA), headquartered in California."

Before the emergence of the Covid-19 pandemic, an unnamed North American company placed a \$5.5 million order with Off Grid Energy.

In Europe, one of the company's first export orders was from Loxam Netherlands in 2014. "Now, we're about to start supplying Boels," says Jones.

He also says Australia has "woken up" to sustainable solutions. The company's partner there is Green Power Solutions (GPS).

Off Grid Energy's sustainable offering could be a recipe for sustained growth.

**IRN**

## Gridtogo proves its worth

UK-based rental company Speedy Hire recently worked with Off Grid Energy to provide a bespoke temporary site power solution to contractor Galliford Try Infrastructure for a highway improvement scheme in Leicester. Two diesel generators were each linked to an energy storage unit.

Compared to a standard generator setup, the hybrid method was said to have reduced fuel consumption by more than 35,000 litres and cut CO<sub>2</sub> emissions at least 94 tonnes since the power sources went live on the A46/A5630 works in September, 2019.

It was also said to have saved the contractor more than £6,000 over that period.

Jonathan Scripps, Major Account Manager at Speedy, said, "Efficient solutions like this, if installed across all construction sites, will play a major role in reducing the overall emissions from the industry."

The A46/A5630 scheme led by Galliford Try Infrastructure for Leicestershire County Council involves improvements of a major connection between the A46, the Leicester local highway network, and a new area of housing in north Leicester.

**Two diesel generators were each linked to a Gridtogo energy storage unit**





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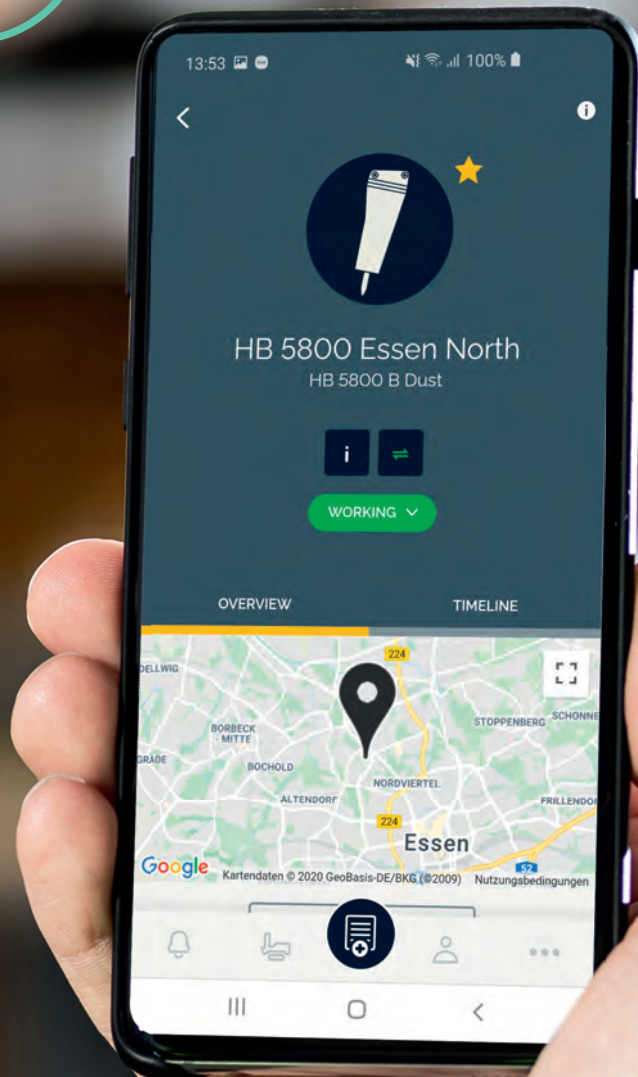


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# Lingering uncertainty

**The Covid-19 pandemic continues to create challenges for European rental companies, and the uncertainty created is visible in the Q3 2020 ERA/IRN RentalTracker survey results. There are signs of hope and recovery, though, as balance figures show improvement**

TABLE 1

## Forward thinking

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

✓ UK/Ireland	70%
✓ Italy	60%
✓ Multinationals	50%
✓ All Europe	45%
✓ Nordic	38%
✓ France	35%
✓ Benelux	33%

As the Covid-19 pandemic rumbles on, European rental companies continue to face challenging times. However, the survey for the third quarter shows signs of recovery and optimism about the future. While the balance figures for a number of the survey questions dipped into the negative for the first time in a while in the last survey, most of them have returned to the positive – though, in some cases, only just.

The 'balance' figure recorded for each question in the survey is the percentage of positive responses less the percentage of negative responses.

### Business conditions now

Across Europe as a whole, 27% of survey respondents said that business conditions were improving in the third quarter, while 26% suggested they were worsening, giving a balance figure of 1%. Almost 47% saw no change in business conditions in the third quarter. Although the balance figure is low, it is certainly an improvement from the last survey in Q1 2020, when the balance figure for business conditions dipped into the negative (-42.6%) for the first time since the beginning of 2013.

It is worth noting that the survey response rate has remained relatively strong despite the difficult circumstances, with 129 responses in the third quarter. We had particularly strong responses from Italy and France. (IRN thanks the various rental associations in Europe for their help in distributing the survey.)

There is clearly regional variation across Europe, given the different ways countries have been affected and their governments have responded. So, breaking it down by country, the UK and Republic of Ireland seem to be the most positive, with 40% of respondents from the region saying market conditions were improving in the third quarter, while 50% suggested conditions had stabilised. This is an improvement on the previous survey, for the first quarter of 2020, in which 50% of respondents from the region had said conditions were deteriorating. Though, the sample size was small for the Q3 survey. Italian respondents were similarly positive, with



40% seeing business conditions improving in the third quarter of the year and 43% reporting stable conditions. We had a much stronger response from Italian rental companies in this survey compared to the last one, which was conducted at a time when Italy was dealing with the peak of the Covid-19 pandemic in the country. The shortage of responses in the first quarter makes it tricky to gauge how the sentiment has changed since then.

Similarly, French companies were busy dealing with the challenges of the pandemic as it first emerged when the first quarter survey was being conducted, so it is difficult to compare. However, the response rate from France was much stronger this time and there is a glimmer of positivity there. 15% of respondents suggested business conditions were on the up in the third quarter of 2020, and 65% reported stable conditions.

A good response rate was also seen from the Nordic states, where 8% of respondents said market conditions were improving and 70% said they were stable in the third quarter. These results are similar to the first quarter survey, in which 8% saw improving market conditions and 62% suggested things were stable.

Multinational respondents were also relatively positive, with a third saying the situation was improving and 50% reporting stable conditions. This compares favourably with the first quarter survey, in which no multinational companies said conditions were improving.

One Swiss respondent made the observation that market demand has shifted towards shorter-term rentals due to uncertainty about the longer-

FIGURE 1

## Europe Business conditions now

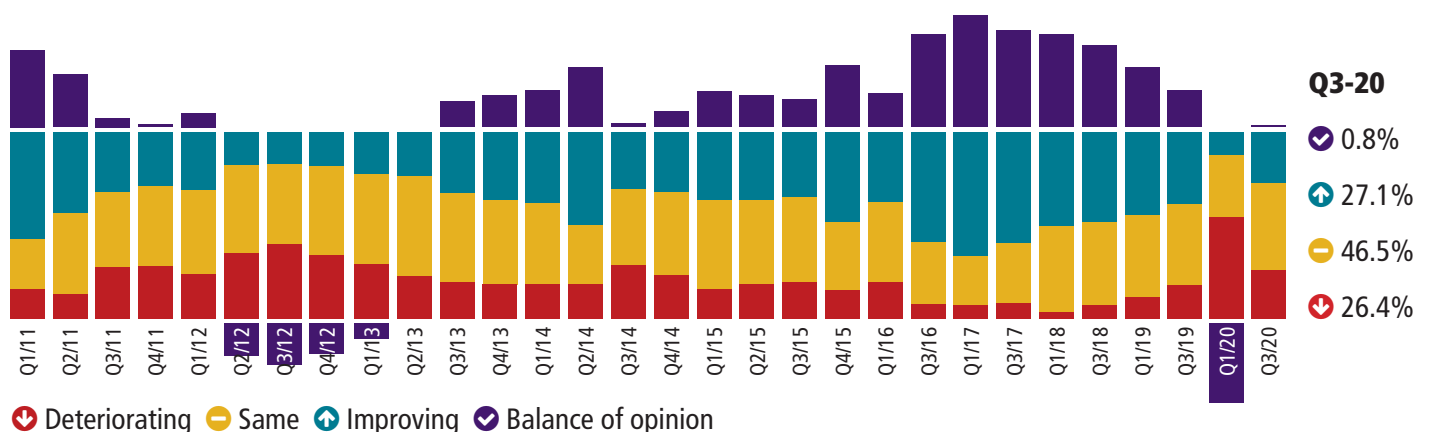




FIGURE 2

## Europe Expectations for year from now

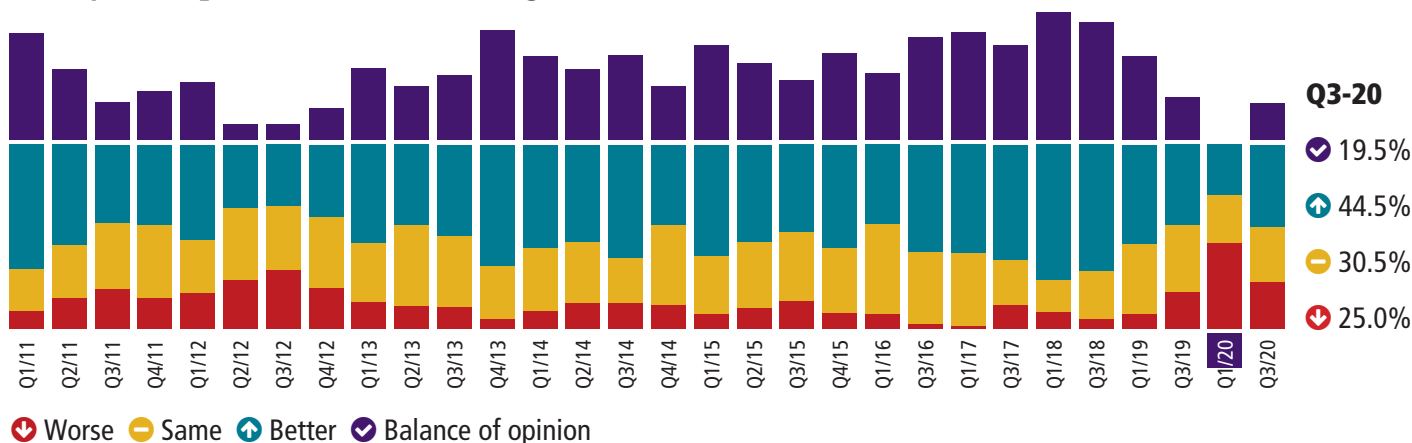
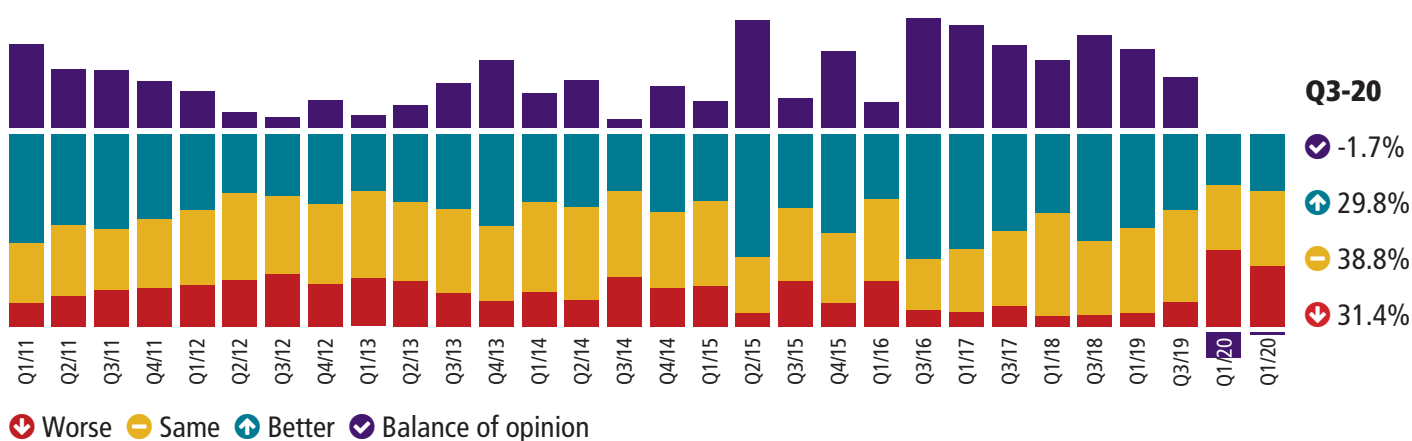


FIGURE 3

## Europe Time utilisation trend



term. They also suggested there is particularly high pressure on prices for medium and large assets.

The tough market conditions resulting from the pandemic were unsurprisingly reflected by the lower year-on-year growth, when comparing the third quarter of 2020 with the equivalent period in 2019.

Taking Europe as a whole, 24% reported year-on-year growth, representing a significant drop from the 38% recorded in the previous RentalTracker six months ago. This continues the downward trend seen in the RentalTracker year-on-year comparison since the beginning of 2018. Also, the overall balance figure for year-on-year growth came to -10.9% – the first time the balance figure has been negative since early 2010.

The highest level of growth was reported by Italian respondents, with 30% seeing an improvement compared with the third quarter of 2019. 47% said activity levels were on a par with the equivalent period last year.

Meanwhile, growth was also reported by a good proportion of French respondents, with 25% saying activity had been higher in the third quarter of 2020 compared to the same period last year, though a similar proportion – 20% – saw a decline.

With regard to year-on-year growth, Nordic respondents were evenly split, with 23% reporting growth and 23% reporting less activity – and the remaining 54% saying activity levels were about the same as last year. This is a deterioration from the

last survey, when 54% of Nordic respondents were enjoying growth compared to the first quarter of 2019 and just 8% had seen a drop in activity.

Of the multinational respondents, 33% reported year-on-year growth in the third quarter of 2020, which is less than the 40% that had reported growth in the previous RentalTracker survey earlier in the year. 50% of multinationals suffered a drop in business in the third quarter of 2020.

Perhaps it is an impossible question given the uncertainty caused by the Covid-19 pandemic, but what are rental companies thinking about business conditions a year from now? Well, the balance figure for what rental companies are expecting business levels to be in 12 months' time has rebounded to 19.5%, from the -18.6% recorded in the RentalTracker survey for the first quarter of the year – which was the first time it had been negative in the survey's history.

Of all respondents across Europe, 45% predicted that activity will be higher this time next year, which is a significant improvement on the 28% that were predicting an improvement in the last RentalTracker survey. Meanwhile, 32% said they expected lower activity in 12 months' time, compared to the 46% that were foreseeing a reduction in the first quarter 2020 survey.

Within those figures, 70% of respondents from the UK and the Republic of Ireland predicted an improvement in business levels in 12 months, while

20% expect to see a drop, giving a positive balance figure of 50%. And this is despite the turbulence caused by Brexit.

Italian respondents were also feeling positive about next year, with 60% saying they expect to see better business conditions in the third quarter of 2021, compared to this year, and just 10% predicting less activity.

In the Nordic region, opinions remained fairly evenly split, as they did in the Q1 2020 RentalTracker survey. 38% of respondents believe business conditions will be better this time next year, while 31% expect conditions to be worse, leaving a balance of 7%.

Opinion was similarly split in France, with 35% of respondents expecting the situation to be better in a year's time and 30% foreseeing a decline in activity.

### Investment

One way of gauging a company's outlook is by looking at its investment plans. In terms of fleet investment, overall in Europe 35% of respondents said their capital expenditure would be higher in 2021 than it was in 2020. This suggests that European rental companies' positivity about next year remains relatively unchanged since the Q1 2020 RentalTracker survey when 39% of respondents said their capex would be higher in 2021 compared with 2020.

Within that, respondents from the Nordics and

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Italy were the most positive about investment plans. 46% of Nordic respondents expect to invest more in their fleets next year, while another 46% said they will maintain the same level of investment. Likewise, 40% of respondents from Italy, plan to invest more in 2021 and 50% will maintain the same level of capex.

Meanwhile, the sentiment is less positive in France, where only 10% of respondents said they would be investing more in their fleet next year compared to this year, but 40% suggested they would be cutting capex.

The UK and Republic of Ireland is a mixed bag, with 30% of respondents looking to 2021 with plans to invest more and 30% planning to invest less.

### Employment intentions

As for employment intentions over the coming months, the majority of Europe's rental companies are intending to maintain similar levels of employment on the whole. 62% of respondents intend to keep the same number of employees for the time being. However, the balance figure was 12% because 25% of respondents will be employing more people in the near future, while 13% plan to reduce staff numbers.

This relatively positive outlook was reflected by UK and Irish respondents, 40% of whom said they plan to employ more people in the near future. The remainder will not change their staff numbers, meaning no respondents expect to reduce the number of employees in the next quarter.

Italian and Nordic responses are also positively skewed, regarding employment plans, with positive balance figures of 23 and 15% respectively.

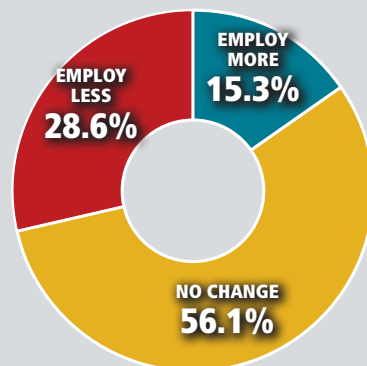
### Time utilisation

Time utilisation rates fell significantly during the peak of the pandemic in Europe, and they appear to be struggling to recover, according to the Q3 RentalTracker survey.

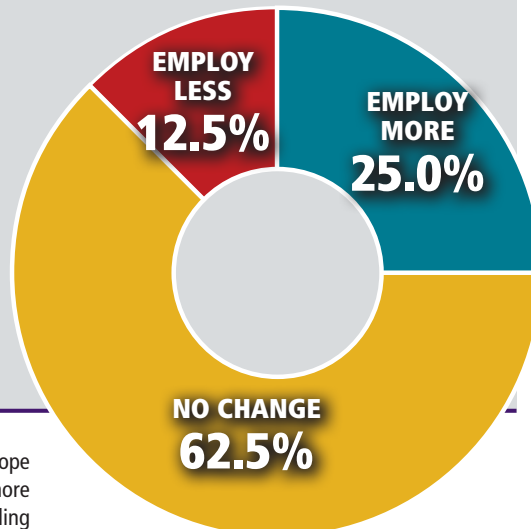
FIGURE 4

## Europe Employment intentions for next quarter

Asked end of Q1 2020



Asked end of Q3 2020



Although 30% of respondents from across Europe reported increasing time utilisation, this was more than cancelled out by the 31% that reported falling rates, giving a balance figure of -13.5%. This is, however, an improvement on the balance of -13.5% reported in the Q1 2020 survey.

This is reflected in French responses, with 15% saying time utilisation was on the up, but 45% reporting falling utilisation rates.

There was a more even split in responses from the UK and the Republic of Ireland 30% said time utilisation was improving, while an equal proportion suggested it was deteriorating.

Some encouragement is offered by Italy and the Nordics, though. 40% of Italian respondents said they were seeing an improvement in utilisation and 20% were seeing utilisation falling, while 23%

of Nordic respondents saw time utilisation rates increasing in the third quarter and 15% saw rates dropping.

The quick, V-shaped economic recovery hoped for earlier in the pandemic has not materialised, and the great uncertainty that remains in the industry is clearly visible in the results of this RentalTracker survey. Since uncertainty can encourage construction companies to shift away from the ownership model, it can be good for rental – at least in the longer-term. In the shorter-term though, while the pandemic lingers on, rental companies continue to adapt.

IRN

TABLE 2

## The here and now

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

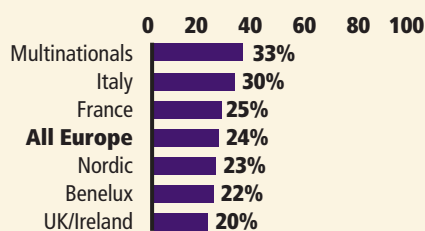
#### PERCENTAGE OF COMPANIES EXPERIENCING IMPROVING MARKET CONDITIONS (END Q3, 2020)

✓ UK/Ireland	40%
✓ Italy	40%
✓ Multinationals	33%
✓ Benelux	33%
✓ All Europe	27%
✓ France	15%
✓ Nordic	8%

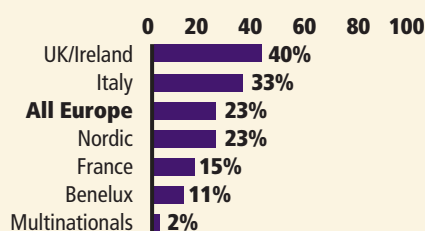
#### NOTE

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

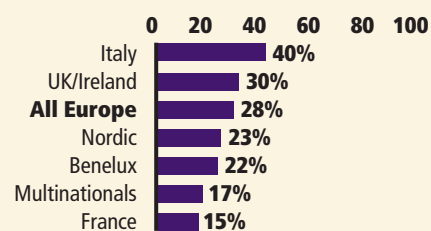
#### PERCENTAGE REPORTING Q3 2020 GROWTH VS Q3 2019



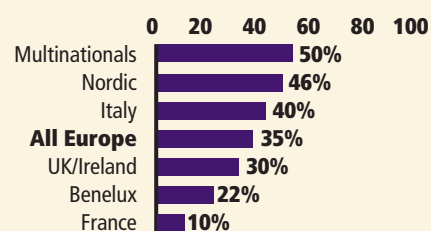
#### PERCENTAGE WHICH WILL EMPLOY MORE IN Q4 2020



#### PERCENTAGE WITH INCREASING UTILISATION IN Q3 2020



#### PERCENTAGE EXPECTING TO INCREASE INVESTMENT IN 2021



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# Founts of knowledge

**As the pump rental market adapts to stricter emissions regulations, Thomas Allen discovers that manufacturers are offering not only new models but also their expertise through guidance and training**

**S**tricter emissions regulations are prompting pump manufacturers not only to introduce new compliant models but also to offer guidance and training to customers to help them deal with the complexities of the new equipment.

US-based pump manufacturer Xylem is making new Stage V versions of its CD100S and NC100S Dri-Prime Godwin S Series dewatering pumps available in Europe and the UK this autumn.

Originally launched as Tier 4 Final models in North America last year, the new versions of the four-inch centrifugal pumps are accompanied by a Stage V Diesel Engine Guide to help customers make the transition.

The CD100S and NC100S, which will be available through Xylem Rental Solutions, both feature a redesigned pump-end that was said to result in 20% greater pump uptime and 40% reduced service time.

Features like this help to justify the extra costs associated with Stage V, according to Simon Mathias, Regional Product Manager, Xylem; "While the added emissions components and electronic controls required to operate the fully compliant Stage V engines have cost implications, the benefits of the new Godwin S Series help to offset the additional investment in the Stage V technology."

These benefits, he tells IRN, include improved serviceability, increased fuel economy, enhanced uptime and reduced emissions.

He adds, "While pumps equipped with Stage V engines do require some additional maintenance operations and procedures, we have solutions in place that can help our customers manage maintenance schedules. For example, Xylem Field Smart Technology (FST), which comes as standard on all our Godwin S-Series pumps, allows operators to remotely monitor and control their pump from anywhere in the world."

With this, maintenance schedules can be optimised and sub-optimal operating conditions identified.

Mathias says that Xylem FST will play an important role in the control and operation of Stage V engines



**Xylem's new NC100S Dri-Prime dewatering pump**

since it can monitor engine load and soot build-up, allowing operators to manage regeneration cycles efficiently.

What challenges has Xylem faced in adapting its pumps to meet Stage V?

Mathias says the challenges include appropriately sizing an engine to a given pump and application, operating the pump and engine optimally to avoid downtime caused by regeneration cycles, and ensuring fuel and Diesel Exhaust Fluid quality.

"Xylem is working to minimise the power and footprint of diesel engine drivers as much as possible," says Mathias. "Working closely with our engine suppliers, we are focused on choosing diesel engine solutions that optimise the power available, minimise the engine cost and maintenance required, and improve fuel economy."

Xylem has also developed a training programme to educate its customers about Stage V.

Commenting on the effects of the Covid-19 pandemic, Anthony Milando, Senior Vice President, Chief Supply Chain Officer, Xylem, tells IRN, "The financial reality of the pandemic means that we are seeing customers shift from capex to opex, which plays to our broad rental portfolio."

In response to the "new reality", Xylem is investing to expand its engineered dewatering solutions to leverage the company's expertise, says Milando.

He adds, "Our teams have shifted to virtual selling to adjust to the realities of the current environment."

The company is also investing in remote and digital capabilities, from transactions to remote asset monitoring, to reduce contact points.

**Atlas Copco's new PAC H pumps are Stage V compliant**



**The CD impeller on Xylem's new CD100S can be exchanged with a Flygt N-Technology impeller**

Xylem's manufacturing and service branches continue to operate and serve customers, though special procedures have been implemented to ensure social distancing and enhance cleanliness.

Atlas Copco has also launched new Stage V pumps: the PAC H range for high-pressure applications.

Said to complete the manufacturer's pumps offering, the PAC H centrifugal pumps are part of the company's Head Series. They can handle liquids containing solids of up to 89mm in diameter.

The pumps' closed impeller has deflector vanes that keep the mechanical seal clean and free of detritus. This helps the mechanical seal last three times longer, according to Atlas Copco, while eliminating the need to use flush water to keep the pump clean.

The semi-cartridge seal design on the PAC H pumps allows changeout without dismantling the pumps and makes

the lip seal and impeller easily accessible, reducing downtime and simplifying maintenance.

## Reducing downtime

Other features designed to reduce downtime and prolong lifespan include a swing door that provides easy access to the pumps' internal workings. Also, bolted wear rings make for precise and simple replacement compared to pressed alternatives, and link belts enable changeovers without having to dismantle the wet end of the unit, which Atlas Copco says reduces the mean repair time by up to 30%.

The PAC H pumps are available in sizes with up to 150m head, with a capacity of up to 1,200m³/h.

They have QR codes that can be scanned to get information about parts and spares.

Meanwhile, US pump producer DAE Pumps has >



## Pumped full of rental potential

Gorman-Rupp says rental is a growing business since it helps end users reduce expenditure on capital and enhances their flexibility.

Although it has been supplying to rental companies for decades, predominantly in the US and in Canada, the US-based manufacturer is now expanding its presence in Europe by partnering with rental companies.

It has a European subsidiary based in the Netherlands, called Gorman-Rupp Europe BV, which develops and builds a range of mobile pumps aimed at the rental market.

Making up the main portion of Gorman-Rupp's rental portfolio is the engine-driven S-Line, which is available from 2- to 10-inch diameters with flow capacities of 45 to 750m<sup>3</sup>/hour. These include both wet and dry self-priming centrifugal pumps, and they are protected by sound-attenuated canopies.

The pumps supplied by the manufacturer are primarily engine-driven, so they can operate independently and in remote locations, though electric-driven units are also available.

Gorman-Rupp supplies not only the equipment and spare parts to rental companies but also training in application, service and maintenance at its training centre in Waardenburg, the Netherlands, or at the rental company's own facility.



The Gorman-Rupp Europe BV facility in Waardenburg, the Netherlands

expanded its line of submersible sludge and slurry pumps with the launch of its new Galveston series.

Comprising three sizes – 4, 6 and 8 inches – the new centrifugal pumps are capable of transferring up to almost 8,000 litres per minute at 56kW.

These heavy-duty pumps are equipped with a combined strainer with a partially open stand and an agitator to enhance suction. They can pass sludge, sand and solids of just over 6cm in diameter.

Richard Russo, Business Development Manager at DAE Pumps, says, "Our customers requesting low-cost, heavy-duty submersible pumps that can process more material in less time now have options with the Galveston series."

### Heavy-duty

Japanese pump manufacturer Tsurumi's new GPN 837 heavy sand pump has been designed to move heavy slurry water. At 9,000 litres per minute, the output of the new model is almost double that of the company's next most powerful pump, the GPN 622.

Designed to pump liquids containing large amounts of solid matter, such as sand, sludge and slurry, the GPN 837 can handle solids up to 30mm in diameter.

The agitator at the suction opening mixes mud and water so that it becomes more fluid. The water is then diverted in a spiral around the pump to counter the abrasive effect of the pumped medium.

The impeller and suction plate are made of chrome cast iron, and the housing of grey cast iron GG 20. Critical elements such as the double inside mechanical seal are made of silicon carbide to further enhance durability.

Weighing 815kg and measuring 1m tall, the GPN 837 is driven by a 37kW electric motor.

It can pump vertically up to 24m, and when submerged it is pressure-resistant to a depth of 30m. The pump also has Tsurumi's oil lifter, which uses centrifugal force to lubricate the pump shaft in any position.

The new GPN 837 is available from stock



Left: DAE Pumps' new Galveston pumps are available in 4, 6 and 8 inch sizes



Right: The new GPN 837 from Trusumi

in Düsseldorf or Antwerp and is shipped to the customer within 24 hours. Tsurumi also offers rental of the model for temporary needs.

### New mobile pump

UK-based mobile pump manufacturer BBA Pumps has introduced the new 3-inch BA75 pump, which is available worldwide.

The BA75 has the capacity to move 100m<sup>3</sup>/h and can handle solids of up to 42mm in diameter.

Powered by a single-cylinder Hatz engine that complies with the strictest emissions regulations, the new model was said to be clean and economical. It is also relatively quiet due to the low engine rpm and insulated canopy.

BBA's new pump, with a weight of 875kg and a footprint of 1.5m<sup>2</sup>, is easily transported.

The model has also been built to be robust, using components that have stood the test of time in BBA's previous models, such as the MP50 vacuum pump and heavy cast iron open impeller with double wear plate. For this reason, the manufacturer offers a 4-year warranty as standard. **IRN**

BBA Pumps' new 3-inch BA75 pump is available worldwide

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# Disrupting the sector

**From hydrogen and electric power to robotics and telematics, an array of new technologies are changing the forklift sector.** Thomas Allen reports

**V**arious disruptive technologies are changing the forklift sector. For instance, Hyundai Mobis recently teamed up with Hyundai Motor and Hyundai Construction Equipment to develop a prototype hydrogen-powered forklift.

The medium-sized forklift has a capacity of up to 4.5 tonnes and can be operated continuously for 5 hours when fully fuelled with hydrogen.

It uses a hydrogen fuel cell system produced by Hyundai Motor Group, paired with a fuel cell power pack developed by Hyundai Mobis. The power pack, which comprises a fuel cell stack, a high-voltage battery, a hydrogen tank and a cooling device, generates the electricity required to power the forklift.

Hyundai Construction Equipment designed and manufactured the vehicle body specially for the hydrogen model and is in charge of evaluating the product.

The hydrogen forklift will be tested in a demonstration project in the Hydrogen Green Mobility Free Regulatory Zone in the South Korean city of Ulsan, with the goal of making the machine commercially available in 2023.

The three companies are also jointly developing a hydrogen excavator prototype, again with the aim of making it commercially available in 2023.

## Robotics

Meanwhile, Warehouse logistics specialist Effidence and Manitou Group are collaborating on the creation of a range of robotic stackers.

The partnership between the two French companies will result in the co-design of autonomous stackers and industrial tractors. It will bring advantages to both companies, including expertise in the latest robotics technologies to Manitou Group and a strong distribution network to Effidence. The manufacturer is already well-established in the production of a custom-made robotic trolley, the EffiBOT.

Cédric Tessier, President and founder of Effidence, said, "With EffiBOT, we have shown that robots can be more than just a means of conveying goods. Our autonomous robots are a real gain in productivity for preparation operations and for operators. The company is now interested in disruptive technologies of cooperative robot fleets.

In this context, we were looking for a solid partner to extend the range of our robots to logistics flows of pallets

or towing heavy and/or bulky loads and we chose Manitou."

The robotic stackers will be assembled by LMH Solutions, a subsidiary of Manitou Group, located in Beaupréau, and their maintenance will be carried out by technicians from the Manitou network.

## Telematics

On the telematics side, Doosan recently launched its LIN-Q Smart Telematics System – a cloud-based forklift fleet management tool that sends information directly to a mobile phone, tablet or PC.

It provides information about parameters such as service and breakdown history, battery charging, fuel efficiency and operating hours.

The service history management function provides data about replaced parts, downtime and service records, with notifications automatically sent when



**Doosan's LIN-Q sends information directly to a mobile phone, tablet or PC**

parts are due for replacement.

The system also records vehicle speed and any shocks in real-time. Alerts are automatically sent to the driver and fleet manager when a speed limit is exceeded or if a shock is recorded.

LIN-Q also enhances safety and security by restricting vehicle usage to authorised operators

## Considering renting?

A key benefit of forklift rental is the flexibility it offers, providing both short-term cover to manage volatility and supplementing fleets in the longer-term.

According to Alexander Baal, Director of Sales Operations at Jungheinrich UK, there are three key considerations businesses should keep in mind when looking to rent rather than buy a forklift truck.

### How can a rental contract help my business?

Baal suggests rental offers a cost-effective way of managing demand during peak periods. When renting, he says, "there is no need for businesses to worry about interest, depreciation, insurance premiums or service costs."

Baal adds that the majority of Jungheinrich's fleet is less than two years old and is regularly updated to ensure reliability and to offer the latest technology.

### How long does it take for rental forklifts to arrive?

According to Baal, there is growing demand for faster access to forklifts to manage demand volatility. Given that fast delivery times and cost are of near equal importance when it comes to renting forklifts, in the UK Jungheinrich promises to dispatch equipment from its rental locations within two hours of an order being placed.

### Why is telematics in rental trucks so beneficial to my business?

"Technology innovation is key to meeting new expectations for faster delivery, on-demand usage and 24/7 operations," says Baal.

There has been growing interest in a rental model based on truck usage rather than a fixed term agreement, and this requires telematics data.

Aside from the security benefits offered by telematics, Baal says, "Analysing telematics data also allows for preventative maintenance programmes to be implemented," which he suggests reduces downtime.

**Alexander Baal, Director of Sales Operations at Jungheinrich UK**







Doosan recently launched its LIN-Q Smart Telematics System for managing forklift fleets

only, and they are required to carry out checks before being permitted to use a forklift.

By preventing damage, Doosan said the system preserves equipment value.

Each forklift's location is also logged in real-time, and an alarm is issued if a machine travels beyond its permitted working area or is operational outside working hours.

A regular monthly fleet management report is sent by email, with information about operational performance, uptime, consumables and service maintenance, among other things.

### New facility

Forklift manufacturer Clark has begun producing in Vietnam. The company recently started mass production of counterbalanced forklifts at its new factory in Hai Duong.

The facility is now producing S-Series internal combustion engine forklifts and higher capacity models for the North American, European and Australian markets.

Rolf Eiten, President and CEO of Clark Europe, said, "With this strategic step, Clark is ensuring for its dealers and end customers worldwide that they not only have access to a comprehensive range of materials handling vehicles with excellent product quality, but also guarantees that specific regional

## Top 10 forklift rental fleets

RANK	COMPANY	FLEET SIZE
1	Jungheinrich	70,000 (EST)
2	Linde	66,000 (EST)
3	United Rentals	51,942
4	Crown	49,000 (EST)
5	Folansi	29,006
6	Still Rental	28,600
7	Toyota Material Handling (Europe)	25,000 (EST)
8	Briggs Equipment	17,000 (EST)
9	JHL	7,400
10	Mateco	3,200

product requirements can be met and that high availability is guaranteed worldwide."

Remarking on the high manufacturing quality at the factory, he added, "With the start of production in Vietnam, we have taken an important step for our long-term success on the world market".

The 5ha production site has room for future expansion, and the factory has a production capacity of 10,000 units per year.

In addition to the production facilities, there is an R&D centre and purchasing of supplier parts is also managed on site.

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Clark's new forklift factory in Hai Duong, Vietnam



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## Telehandler update

Quentin d'Hérouël, Product Manager Telehandlers, Doosan Bobcat EMEA (Europe, Middle East and Africa), tells IRN the impact of Covid-19 on the telehandler market in the EMEA region has varied.

The west of the EU has been harder hit than the east, though this is a bit skewed by Russia's figures.

At the end of August, the UK telehandler market, which is the largest in the EU, was down 50% year-on-year, according to d'Hérouël; "This is no surprise as it is largely driven by the rental segment, which accounts for over 40% of the total market."

Meanwhile, the French and German telehandler markets are down 30% and 20% respectively.

The eastern side of the EU is down 17% overall. However, the Russian market is continuing to grow – up 7.6% on 2019 figures – while other countries in the area are down by an average of 20%.

With regard to the Middle East, d'Hérouël says, "The GCC (Gulf Cooperation Council) countries, which are the main purchasers of telescopic handlers, have been severely impacted by the worldwide crisis with a drop of -41% versus 2019, with a fall of -58% in UAE, which is the largest market in the region."

**Quentin d'Hérouël,**  
Product Manager  
Telehandlers, Doosan  
Bobcat EMEA



**Snorkel's new  
SR626E compact  
rough terrain  
telehandler is  
powered by  
lithium-ion  
batteries**

Africa, as a whole, is down 16% on 2019 figures, and within that South Africa has seen a drop of 22%.

Regarding demand for Bobcat's telehandlers, d'Hérouël says the company's plan for double-digit growth has been undermined by the pandemic this year, but it has still managed to slightly increase volumes compared to 2019, thereby increasing Bobcat's market share.

Bobcat recently introduced a new range of Stage V telehandlers, powered by Bobcat's 56kW D34 diesel engine. It comprises 11 models ranging in capacity from 2.6 to 4.1 tonnes and lifting heights of 6 to 18m.

### First to market

Earlier this year, Snorkel unveiled what it claims to be the world's first fully electric lithium-ion battery powered compact rough terrain telehandler.

The new SR626E has a maximum lifting capacity of 2,600kg, maximum lift height of up to 5.79m and a

forward reach of up to 3.1m.

At 1.89m wide, the model is suitable for indoor use, as well as outdoor projects in low emissions zones.

At the same time, the company launched the new diesel-powered SR1065 telehandler, which is capable of reaching up to 9.5m and has a maximum forward reach of 5.4m. The new rough-terrain model has a maximum lifting capacity of 6,500kg.

Pettibone has also introduced what it says is an industry-exclusive model that forms part of the only telehandler range with an extendable, traversing boom. The new Traverse T944X has forks that can move horizontally by up to 178cm to place loads precisely at full lift height.

Based on Pettibone's traditional design, the new model has a maximum lift height of 13.56m and landing height of 13.41m. It offers a maximum forward reach of 10.9m and a maximum lift capacity of 4 tonnes.

**The new Traverse  
T944X from Pettibone**



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# Digital toolkit

**How can rental companies manage and leverage the increasing amount of data being collected from construction equipment? Thomas Allen looks at the tools being offered by software providers**

The equipment rental sector is waking up to the benefits of digitalisation, and software provides the tools with which to make sense of the growing pool of data being collected by new hardware on construction machines.

However, that digital toolkit can get rather messy. This was a problem faced by US-based Northside Tool Rental (NTR), which has five locations in the city of Atlanta. The company had been using an IT system that relied on a number of different software products, making it difficult to train new staff – especially as the company expanded.

So NTR went in search of software that could handle all aspects of the business, from its inventory and fleet to its employees and finances. It landed upon Point of Rental in 2017.

When it came to transitioning to the Expert software, NTR's Manager of Recruitment and Development Andrew Shields said Point of Rental provided training in advance of going live, which allowed them to "almost flip a switch" when moving over to the new system. Now it can see its inventory at all locations and make reservations on equipment without interrupting other offices with inquiries.

Based on this positive experience, NTR recently decided to implement Point of Rental's Inspection App. It enables the management team to create standard checklists for inspections and other processes to which they want to assign people to ensure they are maintaining a consistent level of quality.

Shields said this helps him because he can implement, track and change those checklists quickly; "Part of my job is to bring in new employees and get them up to speed. Having a programme that helps the business flow the way that it's supposed to, but is very easy to teach to others, is huge."

## Challenge overcome

Meanwhile, software firm Intrador has been working with an unnamed international South America rental company for more than a year, helping it to overcome some of the challenges of managing its fleet.

At the end of rental contracts, the rental company was finding that equipment was often being returned with significant damage and even missing parts.

In an attempt to avoid the extra costs associated with repairs and replacements, as well as the resulting fleet devaluation, the South American rental firm would commission independent inspectors to conduct regular physical inspections on its equipment out on rent. However, this was expensive and not

particularly effective – in reality, about one in every 10 machines was actually inspected.

As a solution, Intrador offered its inspection App, which can be installed on smartphones and tablets, allowing anyone to easily and quickly take photos of machines in a prescribed manner. The App uses artificial intelligence (AI) technology to recognise the machine and it validates the authenticity of the data.

The data collected is accessed via a central online information management system, which gives the location and condition of the machinery.

The App has reduced the client's direct costs by 50%, according to Intrador, and the software company is working to further optimise the solution so that more savings can be realised.

In addition to the inspection App, Intrador has linked its online information management system with its MarketWatch solution, which gives access to online data about used equipment, enabling rental companies to gauge the value of their assets.

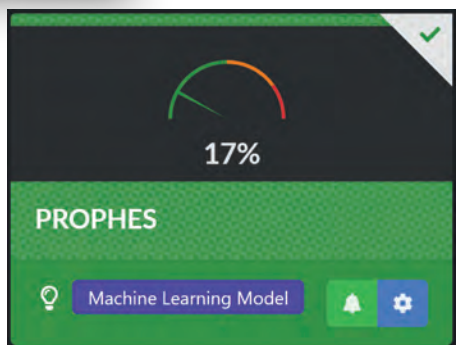
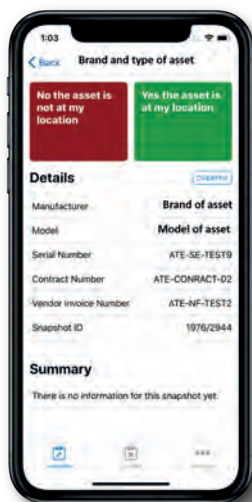
## Remote monitoring

Remote asset monitoring is also increasingly being used in rental. Software company Spartan Solutions has grown its portfolio with the introduction of its new Prophes intelligent asset monitoring and predictive maintenance software.

The Spartan Expert Rules Engine (SPERE) is included in the Prophes solution. Using the web-based SPERE rule builder, equipment experts design, test and launch AI algorithms to react to emerging events or predict future events.

One application of SPERE is to connect the physical product with operational processes using on-board

**Intrador claims its inspection App can reduce costs significantly**



**Northside Tool Rental has started using Point of Rental's Inspection App**

telematics. Using Prophes to connect a physical product with operational processes enables a range of digital workflows to improve efficiency and customer service, says Spartan.

For example, turnaround times can be reduced and utilisation increased by auto-receipting equipment when it is in the vicinity of the receiving depot.

Also, customer service can be improved by alerting customers when equipment is used incorrectly.

Furthermore, technician productivity can be increased and maintenance costs reduced with condition-based monitoring and automated service work creation, according to Spartan.

The company highlights the fact that AI applications like Prophes help to prepare for the transition to predictive maintenance.

## Transferring technologies

Also offering remote monitoring solutions, digital platform security provider Irdeto has begun to transfer some of its technologies, used in other industries, into the equipment rental space.

Most recently, the company introduced Keystone, which is already being implemented by US-based forklift rental company MCJ Supply Chain Solutions.

Keystone enables contactless renting with a digital key, enforced daily inspections, hygiene reminders, and daily maintenance prompts.

Niels Haverkorn, General Manager of Connected Transport at Irdeto, said, "Construction companies, including rental providers, need a flexible, secure rental access management solution. Our Keystone solution provides a suite of controls helping them with booking, handovers, operations and end of rental or daily checks, all done with good health and safety measures."

MCJ, which has four depots serving the US, Canada and Mexico, has begun the process of rolling out Keystone across its rental fleet in North America.

Niklas Strobel, Director Rental Solutions, MCJ, says the system has benefits beyond a standard telematics solution; "The tablet on the forklift sits in a cradle so it can be removed and used as a camera and inspection protocol via the user interface."

He added, "All pre-op checks are stored with photos on the back-end." Irdeto is working on AI

**Spartan Solutions' Prophes asset monitoring and predictive maintenance software uses AI**

Impact Detected  
Limp Mode Active

Start Machine Check

**With Irdeto's Keystone software, equipment can automatically be put in limp mode when an impact is detected**

technology to analyse photos to identify damage.

Also, if there is an impact, a check procedure can be enforced; "The truck will go into limp mode automatically and that will only be unlocked once the post check has been applied with satisfactory conditions," says Strobel.

Other benefits include the ability to tailor driver programmes to a particular operator, for instance reducing the maximum speed for new operators.

Also, good behaviour can be rewarded, for example by offering reduced rental rates when no impacts are recorded during a given rental period.

## Rising demand

The pandemic has been driving digitalisation in recent months since it can help business to continue while maintaining social distance. Rental software provider MCS has seen a rise in demand for its electronic signature capture product, MCS E-Sign.

It enables rental companies to provide a faster service to customers and reduce the margin of error because quotes and contracts can be signed from any device.

Nick Thomson, Sales Director at MC, said, "Before this solution, many companies would be sending out quotes and contracts that would need to be printed, signed, scanned and sent back as 'approved'. This took time and was often a cumbersome process.

However, it was clear that our customers valued making sure there was a formal signature attached to their quotes and contracts to make the hire process as smooth as possible. Now, our customers are able to send out documentation to their clients which can then be digitally signed from any device."

Customer service is also enhanced by MCS's mobile Apps, such as Transport Mobile and Workshop Mobile, which give rental companies visibility of their workforce and enable them to provide customers with real-time updates on the progress of service engineers and delivery drivers.



**MCS has seen a rise in demand for its electronic signature capture product**

## Ahern suing EquipmentShare

US-based Ahern Rentals has filed a patent infringement lawsuit against EquipmentShare regarding telematics technology owned by Ahern.

The lawsuit also asserts that EquipmentShare has waged a four-year campaign of misinformation, trade-secret theft and employee poaching against Ahern.

Ahern is seeking damages, as well as an injunction against EquipmentShare's further use of the disputed telematics technology.

The keyless technology invented by Daniel Abshire – and subsequently acquired by Ahern – ensures only authorised operators can use rented equipment within the agreed rental period.

The technology also permits remote lockdown of the equipment if any attempt is detected to disable the authorisation code.

Ahern's complaint alleges that around 2016, EquipmentShare was having technical issues with its own Track system. So two company executives, who had previously known and done business with Abshire and were aware of his patented technology, arranged a meeting between the inventor and EquipmentShare's Co-founder Jabbock Schlacks.

Ahern suggests that during the meeting Schlacks gleaned technical information from Abshire while asserting that the company was prepared to offer the inventor money and stock options for the rights to the patent.

However, Ahern claims that following the meeting EquipmentShare ceased communication with Abshire, and shortly thereafter EquipmentShare fixed the problems with its Track system.

EquipmentShare subsequently filed its own patent application with the US Patent and Trademark Office, describing functionality of its system that Ahern claims directly mimics Abshire's patent.

Ahern's lawsuit contends that the fix was accomplished with information gleaned from the meeting with Abshire, and infringes on his patent.

Lacking the resources to enforce his intellectual property rights on his own, Abshire assigned them to Ahern.

EquipmentShare has responded to the claims by Ahern, saying, "EquipmentShare is still in the process of reviewing the complaint. It is clear from our initial review that there is no infringement because the mechanism described in the patent is not one that is utilised by EquipmentShare or described in any patent application EquipmentShare has filed.

"In developing the ES Track platform, EquipmentShare determined that mechanisms similar to the one described in Ahern's patent would not be a practical solution for our customers and we are not currently aware of any company that utilises the claimed mechanism."

**Founders of EquipmentShare: Jabbock Schlacks, CEO (left); Willy Schlacks, President (right)**



Thompson said, "Rental businesses have the ability to receive automatic alerts from the MCS Transport Mobile solution that trigger text messages to a customer with an expected arrival time. The Transport Mobile solution can also provide the team in the office with clear visibility of which service engineers are best equipped to deal with an ad-hoc job request."

## On the cloud

The solution offered by UK-based rental software firm HireHop, founded in 2016, does not need to be installed, updates automatically and can be accessed via a web browser because it is cloud-based.

This makes it fast to operate, according to the company's Chief Technology Officer Justin Levene, who adds that the platform is fully customisable.

Levene says one problem with existing rental software is that it can only link to one type of accounting software at a time; "As some rental companies operate more than one company in the same depot, or different companies at different depots, with each company using different accounting software," Levene says, "HireHop developed a new and unique simple-to-use feature to handle this complex problem."

HireHop has added the ability to assign different



**HireHop's simplified Point of Sale system works on touchscreen POS terminals, normal computers, phones and tablets**

accounting software, including Sage 50, Sage Business Cloud, QuickBooks and Xero.

This means that invoices and credit notes are automatically directed to the accounting software of the appropriate depot or company within a depot.

"HireHop also synchronises all transactions live with the accounting software. Or, if preferred, it can buffer them and synchronise them at a chosen time," Levene adds.

The HireHop platform also handles the complexities >





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of different taxes for different countries within the same account, and it can process multiple currencies.

Another new feature highlighted by Levene is the simplified Point of Sale (POS) system. Given that the various features offered by HireHop for a rental desk could be confusing for a new or inexperienced worker, the company has included on its platform a cash register style interface that enables the rental and sale of parts to be processed quickly and easily.

The system works on touchscreen POS terminals, normal computers, phones and tablets.

### Right data, right place

Getting the right data to where it needs to be is fundamental to driving digital operations, according to Steven Thomas, Chief Technology Officer of telematics provider ZTR.

"We're offering a next gen user interface that's intuitive, mobile/web integrated, responsive and adaptive, with applications available on multiple form factors. We've optimised our delivery on a global scale to ensure we provide market availability faster than ever," Thomas says.

One example he points to is Genie Lift Connect, which is a telematics programme powered by ZTR. It has been designed to address the business needs of rental companies, such as Vandalia Rental in Vandalia, Ohio, US.

Kurt Barney, President of Vandalia Rental, said the Genie Lift Connect programme allows his company to enhance equipment uptime; "Within the system,

we can set up notification parameters that can warn us of potential equipment issues so we're able to proactively troubleshoot problems, reduce jobsite trips and increase our overall repair efficiency."

The Genie Lift Connect programme continues to evolve, though, to further

**Steven Thomas,**  
**Chief Technology**  
**Officer at ZTR**



## Dozr offers e-commerce to rental partners

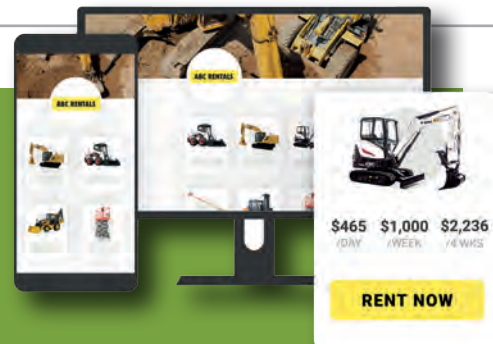
Online heavy equipment rental platform Dozr has launched a new software product called WebStores that can be applied to rental companies' existing websites to offer an e-commerce storefront for their customers.

Kevin Forestell, CEO of US-based Dozr, said, "The demand for e-commerce has advanced tremendously over the last six months. Customer expectations are changing and contractors want to book their rentals online through touchless, paperless transactions."

He added, "We are thrilled to offer this product across North America so our partners can transact faster than ever with their customers, fully online through their own e-commerce solutions, powered by Dozr."

Described as a way for companies to "meet new business and customer expectations in a post-Covid world", Dozr said its new WebStores software could integrate with any existing equipment rental website and maintain its original look and feel, while enabling touchless transactions with an online checkout.

The software can introduce a number of features into existing rental websites, including digital transaction processing, real-time rental requests and inventory tracking and pricing. Functions such as preferred dynamic pricing for account customers and credit account payments can also be used with the software.



**The WebStores software can be used as a standalone or integrated into an existing website without the need for programming, says Dozr**

help rental customers, for instance by leveraging the ZTR Data Brokerage service, which enables machine data to be shared securely across multiple customer accounts.

Christine Zelnick, Genie Director of Product and Business Development, Telematics, Terex AWP, says, "We've been working to provision all of our machines destined for rentals to be automatically configured in a way that brings visibility to both the rental company and OEM."

"ZTR provides us with the API [Application Programming Interface] technology and processes to set this up seamlessly from the factory floor, enabling our collective vision for a more connected value chain across the industry. The result is that rental companies get a telematics-ready solution with data flowing into their business system. Accessing Lift Connect and all its advanced features, we also have visibility to serve and support our customer."

### Expansion

US-based technology and rental firm EquipmentShare has expanded into New Zealand. Until recently, the company had offered its smart jobsite technology and equipment rental, retail and service distribution exclusively to customers in the US, through a growing footprint of more than 70 locations.

Now, EquipmentShare New Zealand (NZ) is expanding the company's technology platform to accommodate rental service providers, rental customers and contractors internationally.

EquipmentShare uses cloud technology to power its portfolio of digital solutions, which include features and tools that enable customers to rent, track and maintain mixed fleets of construction equipment, as well as monitor spending, coordinate employee hours and streamline maintenance schedules.

EquipmentShare intends to continue expanding its offering into other markets in 2021. **IRN**

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# INTERNATIONAL rental CONFERENCE ASIA

23 November 2020 Shanghai, China

**This year's edition of the International Rental Conference (IRC) will be a predominantly Chinese event due to travel limitations caused by the Covid-19 pandemic**

## Event details

**WHAT:** International Rental Conference (IRC)  
**WHEN:** 23 November, 2020  
**WHERE:** Jumeirah Himalayas Hotel, Shanghai  
[www.khl-irc.com](http://www.khl-irc.com)

The event will again take place at the Jumeirah Himalayas Hotel in Pudong, Shanghai

# China focus

**A**lthough this year's International Rental Conference (IRC) – the eighth edition – is going ahead in Shanghai, China, as planned on 23 November, the format is a little different as a result of the Covid-19 pandemic. It will be an event for the Chinese market, with predominantly Chinese speakers and two pre-recorded video presentations from Western rental experts.

The conference will be held at the Jumeirah Himalayas Hotel in Pudong, Shanghai, next to the venue for the Bauma China exhibition, which is also taking place as scheduled, on 24-27 November.

Given the pandemic and travel limitations, the event is likely to have a less international profile than in previous years, but an audience of more than 250 delegates is still expected.

In addition to insights from Zhi Kai Yin, General Manager, LGMG, into how the access rental market

is evolving in China, Tei Gyomei, Managing Director, Hitachi China, will speak about how to manage a rental company profitably.

As well as his position at Hitachi China, Mr Tei is a director of the Japan Construction Equipment Rental Association (JCRA) and the organisation's representative on the Global Rental Alliance (the umbrella body for the world's equipment rental associations). He has extensive knowledge of Asia Pacific and Japanese markets, having previously worked for Nippon Caterpillar's rental business in Japan.

In the presentation by Chai Zhao Yi, Managing Director, Shanghai Panguan, some light will be shed on the management of rental processes, but he will also talk about the post-Covid-19 recovery.

Chai Zhao Yi founded Shanghai Panguan in 1994 and it is now China's largest tower crane rental

company, with a fleet of more than 7,000 cranes operating all over China. Panguan is also the owner of the largest fleet of tower cranes in the world.

Meanwhile, Peter Douglas, CEO & Managing Director, IPAF, will speak to the importance of maintaining safety while growing rental operations.

Peter Douglas was appointed to the post of CEO and Managing Director of IPAF on 1 December, 2019 following a long and successful career in the powered access rental business. He spent 26 years with Lavendon Group's UK business, Nationwide Platforms, during which time he held positions including UK Managing Director of Lavendon Access Services and UK Operations Director at Nationwide Platforms.

Despite the challenges posed by the pandemic, IRC 2020 promises to be a popular and enlightening event. **IRN**

## Programme

The 2020 programme will again deliver a mix of world-class rental management presentations from market leading companies with up-to-date information on the Chinese and Asian rental market. The event will have simultaneous translation in English and Chinese.

### 08:00 – 08:55

Registration, networking and morning coffee

### 08:55 – 09:00

**CONFERENCE OPENING**  
**Cathy Yao** – Managing Director, KHL China

### 09:00 – 09:10

**WELCOME ADDRESS** (Video)  
**Murray Pollok** – Managing Editor, KHL Group

### 10:00 – 10:30

How technology can serve the rental supply chain  
**Han Xiao Ming** – Chairman, Tianyuan Group

### 10:30 – 11:00

MORNING COFFEE

### 11:00 – 11:30

Rental case study: the mining sector in China  
**Lv Tao** – Managing Director, Kanamoto China

### 11:30 – 12:00

New technology in access equipment  
**Zhi Kai Yin** – General Manager, LGMG

### 12:00 – 12:30

Key trends in North America's rental market (Video)  
**Ken McDougall** – President, Skyjack

### 12:30 – 14:00

LUNCH BREAK

### 14:30 – 15:00

General Rental Market: experience, current situation, future trend  
**Chen Jian** – Chairman, E-rental

### 15:00 – 15:30

The future of China's access rental market  
**Susan Xu** – General Manager and Founder, Sinoboom

### 15:30 – 16:00

AFTERNOON COFFEE

*NOTE: The conference programme may be subject to modification.*

### 16:00 – 16:30

The Trend of Construction Equipment Market: World and China  
**Shi Yang** – Director of Research, Off-Highway Research

### 16:30 – 17:00

Managing safety in a fast-growing rental business (Video)  
**Peter Douglas** – CEO, IPAF



### 17:00 – 18:30

NETWORKING AND DRINK RECEPTION

### 09:10 – 10:00

MORNING KEYNOTE  
Key concepts in rental pricing and financial management  
**Tei Gyomei** – Managing Director, Hitachi (Shanghai)



### 14:00 – 14:30

AFTERNOON KEYNOTE  
Managing rental process, and the market after Covid-19  
**Chai Zhao Yi** – Managing Director, Shanghai Panguan



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# All eyes on China

**The construction industry will be keen to see how Bauma China pans out, since most other trade shows around the world have been postponed due to the Covid-19 pandemic. The exhibitor numbers are encouraging though, so it could be a success**



In instances where the staff of international companies cannot travel, colleagues from their Chinese partners will be present

**T**he Covid-19 pandemic has severely impacted the events industry, with a whole host of construction-related shows being postponed or even cancelled this year. So the eyes of the construction world will be fixed firmly on Bauma China.

Preparations for the show are in full swing and the figures are looking positive, with 2,800 exhibitors once again occupying the entire Shanghai New International Expo Centre (SNIEC), which has 17 halls and an outdoor area. In total, the exhibition will cover approximately 300,000m<sup>2</sup>.

According to Maritta Lepp, Exhibition Director for Bauma China, there will be a good number of global brands at the show, despite the restrictions on travel caused by Covid-19; "Many international companies have been looking for ways to exhibit again this year. Take, for example, those with Chinese subsidiaries or dealers: in case they cannot travel themselves from Europe, the US, Korea, Japan, etc., they will have their Chinese colleagues onsite."

**Maritta Lepp,**  
Exhibition  
Director,  
Bauma  
China



**This year's edition will be a predominantly Chinese event, with many of China's biggest construction OEMs exhibiting**

"In addition, we are pleased about the three remaining international joint stands from Germany, Italy and Spain, which together make up 73 exhibitors and an area of over 1,800m<sup>2</sup>. For these reasons, the internationality of the exhibitors will not be missed."

## Global brands

Some of the global brands that will be exhibiting include Volvo CE, Haulotte, JLG, Terex, Snorkel, Liebherr Components, Sandvik and Bauer Maschinen GmbH. In addition, a number of major Chinese OEMs will be present, such as Sany, XCMG and Zoomlion.

The construction industry in China has recovered quickly from the impact of Covid-19 and is predicted by specialist market research and forecasting company Off-Highway Research (OHR) to grow by double figures in 2020. The timing of the show is good, with China playing a disproportionately large role in the global construction industry at present, with most other markets expected to see minimal growth at best, if not retractions.

"The Chinese government has taken numerous measures to strengthen the economic development after Covid-19, with first successes becoming apparent. According to the government, the gross domestic product grew again by 3.2% in the second quarter – after the coronavirus-related upheavals in

# bauma CHINA

## Event details

**WHAT:** Bauma China 2020

**WHEN:** 24-27 November, 2020

**WHERE:** Shanghai New International Expo Centre, Shanghai, China

**OPENING HOURS:**

24-26 Nov, 9:00-17:00 | 27 Nov, 9:00-15:00

[www.bauma-china.com/en](http://www.bauma-china.com/en)

the first quarter," says Lepp.

"A relaxed monetary policy and strong investments in infrastructure, consumption and health care are aimed at stable economic activity for the rest of the year."

Making reference to OHR's growth projections for China, Lepp said, "This makes China the only major country to see growth in equipment sales this year and Bauma China comes at a time when all other sector shows worldwide are being postponed or cancelled. We see that there is a great need for the construction and mining industry to re-launch the business in China."

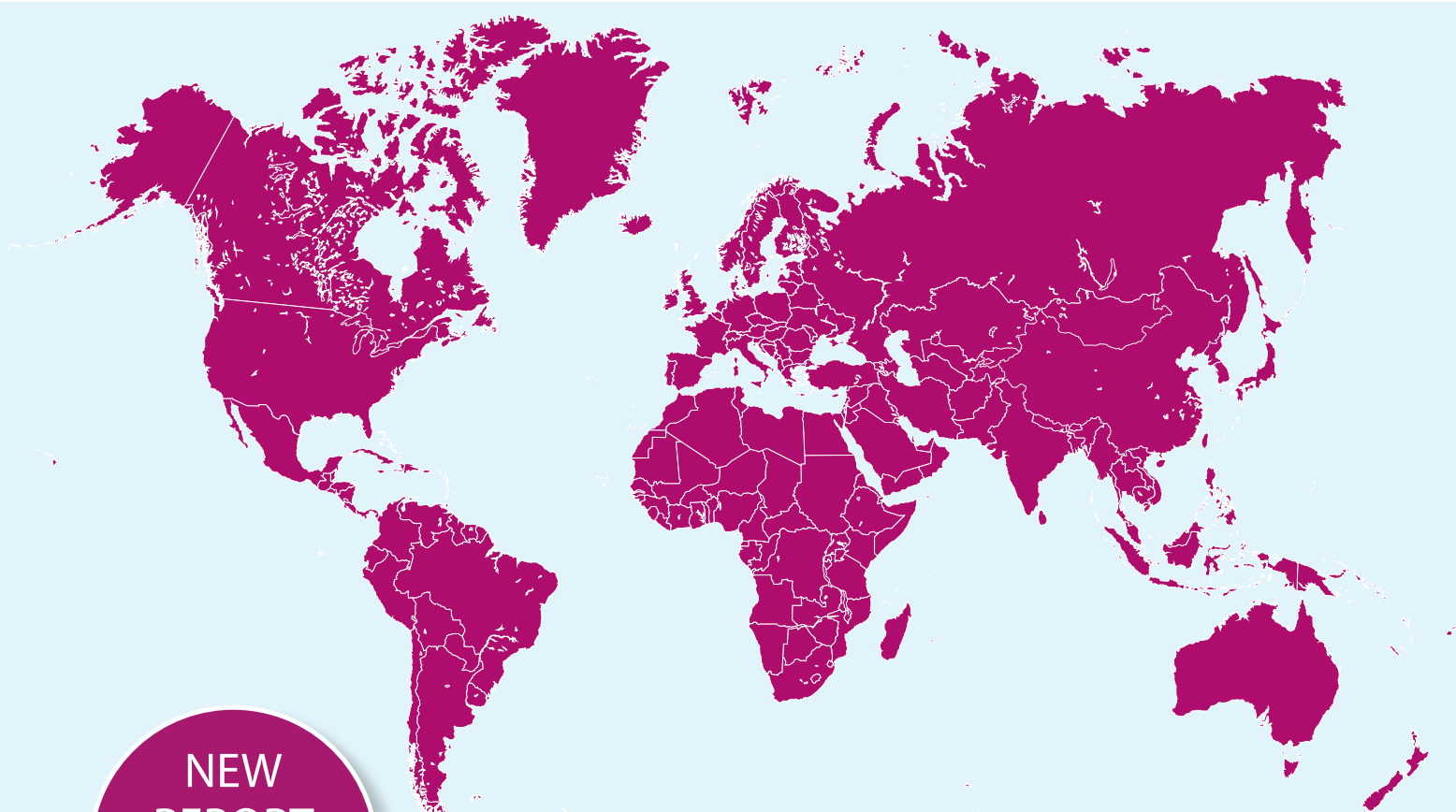
**IRN**



**The show is held at the Shanghai New International Expo Centre**

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# Heading for the stars

**Revenues for the world's largest rental companies have grown at an astounding rate over the last decade and a new study sees no sign of a slowdown**

**R**evenues for the IRN100, the 100 largest rental companies in the world, have more than doubled in the last decade according to a new joint report by IRN and specialist market research company Off-Highway Research.

This rise is equivalent to a compound annual growth rate (CAGR) of almost 9%. Over the same period, global construction equipment sales have grown at a CAGR of just 4%, so this illustrates the dynamic, high-growth nature of the rental industry worldwide.

The IRN100's revenues exceeded €53 billion in 2019. Off-Highway Research forecasts that this will rise to €75 billion in 2024.

Chris Sleight, Managing Director of Off-Highway Research, said, "Two fundamentals have driven this growth. First, rental is a consolidating industry, with several key participants such as United Rentals (US), Loxam and Boels (Europe), and Aktio (Japan and southeast Asia), among others, making some of the largest acquisitions in the segment and driving very steep growth in their revenues, footprint and headcount.

"Second, there is evidence in many markets that an increasing share of equipment is being bought by the rental segment, as opposed to more traditional buyers such as construction contractors.

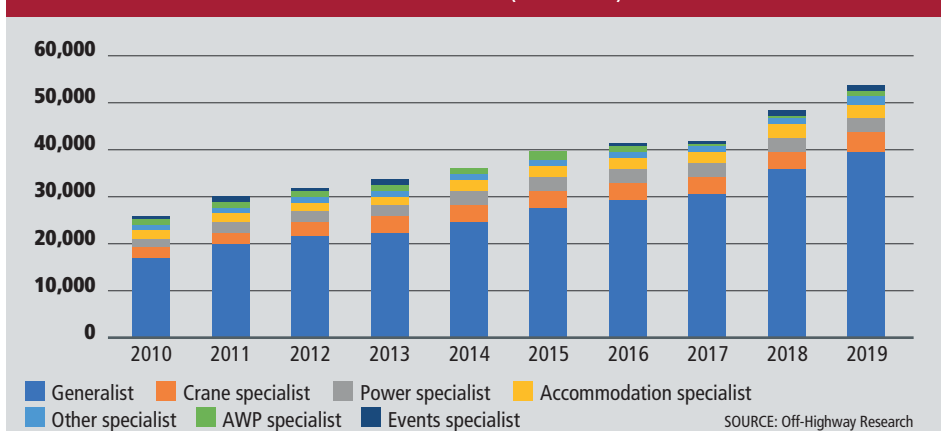
"One effect of consolidation in the industry is that a handful of large rental companies are claiming an increasingly large share of total revenues. In 2009, the five largest companies in the IRN100 accounted for 22% of the group's total revenues. Last year that had risen to 38%."

## Improving productivity

Although the revenues generated by the IRN100 rental companies have risen significantly over the last decade, employee numbers have grown at a slower rate and the number of depots operated by these companies has seen shallower growth still. This implies both improving productivity (revenues per employee) in the industry as well as some rationalisation of footprint.

North American headquartered companies account for the largest share of the IRN100's revenues, underlining this region as the most important rental market in the world. Consolidation among North American rental companies has meant their relative share of IRN100 revenues has grown in the last decade, and consolidation in the worldwide industry in general is seeing more and more of the IRN100's

## IRN100 REVENUES BY COMPANY TYPE (€ Million)



revenues concentrated among the largest companies.

General rental now accounts for 75% of the IRN100's revenues, compared to 70% a decade ago. The large generalists have absorbed some activities that were previously considered a speciality in some markets – particularly powered access rental in North America and Europe.

In some cases, however, large general rental chains have established separate divisions offering a specialist rental service such as power or climate control. In this respect, Japan is the most advanced region, with all its large rental companies being classified as generalists.

Having said this, there are some specialist rental activities that do not sit comfortably within those of a general rental operation, so services such as crane rental (which in many cases sees the rental company operate as a lifting contractor) are likely to always be stand-alone.

## Going public?

The majority of the IRN100's revenues are attributable to stock market traded public companies. In 2019 the split was 57:43 public: private companies – a split that has remained relatively stable over the last decade.

Sleight said, "I found it a little surprising not only that so many rental companies remain in private ownership, but that so many large companies still have this structure but have the access to capital to make significant acquisitions.

"I think it's important to remember that rental is still a relatively immature industry, even in the most developed and consolidated markets. I would expect ownership to shift more towards public stock-market quoted companies as greater amounts of capital are required for the bigger and bigger acquisitions which are surely coming.

"That means we can expect large private rental companies to seek stock market flotations and there will be some jaw-dropping mergers in the years to come."

Last year, 88% of the IRN100's revenues were attributable to independent, third-party companies, a proportion that has been stable for the last five years.

The remaining 12% was attributable to rental companies that were either owned by construction

equipment manufacturers or their dealers. A little over half of this, or 7% of the IRN100's total revenues, were attributable to Caterpillar dealers. OEM-owned or affiliated rental is most prevalent in Japan, where last year it accounted for 20% of the revenues generated by the rental companies in the IRN100.

## Key big spender

Another important area covered in the report is capital expenditure by rental companies.

Sleight said, "We found that capex for companies in the IRN100 is usually equivalent to around 15% of their annual revenues, but the variations are enormous. For some the capex ratio is held stubbornly below 10% per year, while for others it can exceed 40%.

"Knowing which rental companies are which is interesting for both the manufacturers which are looking to supply the industry as well as for other rental companies looking to benchmark their performance."

He concluded, "The largest rental companies – the likes of United and Ashtead – have grown to such a size that their annual capex is now more than €1 billion per year. For United it is approaching €2 billion. That may well make it the biggest equipment buyer in the world, and it's only going to get bigger."

The Global Rental Industry report is available to buy at [www.offhighway-store.com](http://www.offhighway-store.com) and [www.khl-infostore.com](http://www.khl-infostore.com)

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**A video podcast interview with Chris Sleight can be viewed at KHL.com, in which he speaks with Thomas Allen, Editor of IRN, about the key findings of the new Global Rental Industry report.**



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**Joel Honeyman, Vice President of Global Innovation at Doosan Bobcat, explains to Mike Osenga of sister magazine *Diesel Progress* how the company is taking its first steps into electrification through a partnership with Green Machine, beginning with compact excavators and tracked loaders**

# First steps into electrification

## Four compact excavators

The programme, which currently covers select North American markets, will include four Bobcat compact excavator models: the E10, E20, E35 and E50. The four machines range from the 0.7kW E10 with an operating weight of 1,176kg to the 37kW E50 which weighs 5,151kg. "These models provide us with a good platform and a good model mix within the compact excavator line," Honeyman says.

With the four compact excavators, Green Machine will take current Bobcat models, remove the engines and install its battery and battery management systems at its Buffalo operations. It will also source and install the electric motors to drive the hydraulics.

The resulting machines will be sold by Green Machine but will be Bobcat-branded.

The second step is somewhat further from going to market. At the ConExpo tradeshow earlier this year, Doosan Bobcat showed an all-electric model of its 55kW T76 compact tracked loader. Honeyman says the electric T76 is more of a concept vehicle.

"In this case, there are no hydraulics. We took all the hydraulics off and are using electric motors," he says. Honeyman adds that Green Machine is also providing the battery and the battery management systems for that programme as well. "It is a concept vehicle, more in the development phase. But we are actively working on loaders as well as excavators."

## About Green Machine

Founded in 2010, Green Machine is a wholly owned subsidiary of alternative energy company Viridi Parente, which manufactures battery packs that the company says are being used in an array of markets. The company says it uses lithium-ion cell technology, paired with its System Intelligence battery management system.

Green Machine has converted and rented, sold



**Joel Honeyman, Vice President of Global Innovation at Doosan Bobcat**

or leased other types of electric drive compact construction equipment under its own brand name, as well as having custom, low-volume development programmes with other OEMs. Currently the Green Machine line includes two models of electric compact excavators, an electric mini-skid-steer loader, an electric light tower and a mini-backhoe loader.

Green Machine, in collaboration with WhisperDrive, uses a proprietary lithium-ion battery technology. For its own machines, it lists 12.8kWh, 14kW and 56kW lithium-ion battery packs as the power sources.

Honeyman refers to the Bobcat partnership with Green Machine as a limited launch initiative; "We're going to go into select markets where there have been requests by customers and there has been interest in this kind of technology. Whether that's working indoors, on job sites where noise is an issue, or where people are more environmentally conscious and are looking for an electric machine."

"We have had a number of conversations with large contractors and utilities that are very interested in this technology. So those are the ones we're going to work with in select markets."

"Everyone has questions," he says. "Does it perform the same as a diesel machine? What are the reliability characteristics? How long does the battery last? You have to sit in and operate the machine to experience it."

From there, Honeyman said, as this potentially ramps up over the next year or two, Bobcat would look at how it would scale up production of the electric machines in its own facilities.

"Part of this is a learning process for our dealers and customers. It's a new type of product, so starting on a smaller scale really helps us to do this. At some point we will produce a diesel version of the product and an electric version. The question is, when do you do that, and how do you do that, within the current platforms and facilities?"

**IRN**

**D**oosan Bobcat North America, the well-known manufacturer of compact off-highway machines headquartered in West Fargo, North Dakota, US, is taking its initial step into the world of electrification.

It is actually a two-step approach to sizing up the potential for electric drives on Bobcat equipment, initially with select compact excavators and compact tracked loaders.

The first step finds Doosan Bobcat entering into a partnership with Green Machine Equipment, based in Buffalo, New York, to produce electric Bobcat compact excavators.

Green Machine will custom retrofit four Bobcat excavator models with its proprietary battery and battery management technology to replace the diesel power source. Green Machine will sell the converted machines in select markets beginning in 2021, says Joel Honeyman, Vice President of Global Innovation at Doosan Bobcat.

"We viewed Green Machine as a way for us to enter the electrification market with our current equipment, converted over to electric," Honeyman says. "With this agreement we have a partner that is able to provide that expertise."



**A Bobcat E50 in action**



# Digital gets physical

**Dick Klaassen, founder of tracking and monitoring provider Xeelas, walks us through the challenges of connecting large fleets of assets digitally while achieving a good return on investment**

**T**he success of Industrial IoT (Internet of Things) projects is found in the physical world. With this remark I take a stand.

Here are a few details about me: I worked for the Royal Dutch Air Force's technical support detachment for eleven years. During that period, I dealt with a variety of industrial machines: generators, cool containers, compressors and pumps. I know these machines like the back of my hand. Years of experience in connecting industrial fleets have taught me how even the smallest mistakes can have massive impacts on return on investment (ROI).

I would like to show you how to achieve a good ROI on your Industrial IoT (IIoT) projects.

I will start by outlining the challenge we currently face. We will then explore the difficulties of retrofitting a fleet of rental machines; an arduous task that can come with a hefty price tag. After that, we examine the issue of scalability in IIoT, and you will see how you can realise this for your machines. Lastly, we will look at what should happen when your machines are connected. What will you do with your data? How can you ensure that it reaches the right person?

## Going physical again

Several waves of innovation, starting with the Industrial Revolution up to the current Digital Revolution, have shaped our ways of living and working. The Digital Revolution started in the physical world with computers, then came the Cloud with Internet and networks. Because computers and chips have become small and cheap, we're moving back to the physical world; this time it is called Industrial IoT. However, we have lost some of the skills that connecting to the physical world requires. This poses a challenge: how to connect thousands of real-world assets without going bankrupt.

## The issue of retrofitting

When we discuss Remote Monitoring Projects, there is plenty of talk about pay-per-use, paying per kilowatt or degree. At the moment this is more talk than execution. Before you can work with such models, you need a lot of information about

your equipment. For instance, how much energy it consumes and how your customer uses it. This is where IIoT with its remote monitoring comes in. You learn more about your customers' behaviour, and you will be able to use what you have learned to build a price model.

A major challenge in connecting your fleet of machines is that there is always horizontal and vertical differentiation. This makes it difficult to connect a fleet as a whole. If we look at generators, for example, generator power can range between 35 and 2,000kVA. Such a wide spectrum means completely different machines with different use cases and support needs. Then there is a variation in construction and types, because generators from 2005 differ from those constructed in 2010 or 2018. Brackets may be placed differently, control elements might have changed, or their connectors and sensors differ.

In addition to that, having a variety of sensors in your machines will result in different signals. You have to be able to read all of these signals to determine the actual fuel level. For this, you must

connect the machines, which will be difficult, due to the aforementioned variation and construction differences. On top of that, different types of machines will give different signals when it comes to fuel levels, running hours, the alarms they generate, and the number of amps used. You are in danger of missing out on information – a big obstacle to achieving scalability.

## Scalability in Industrial IoT

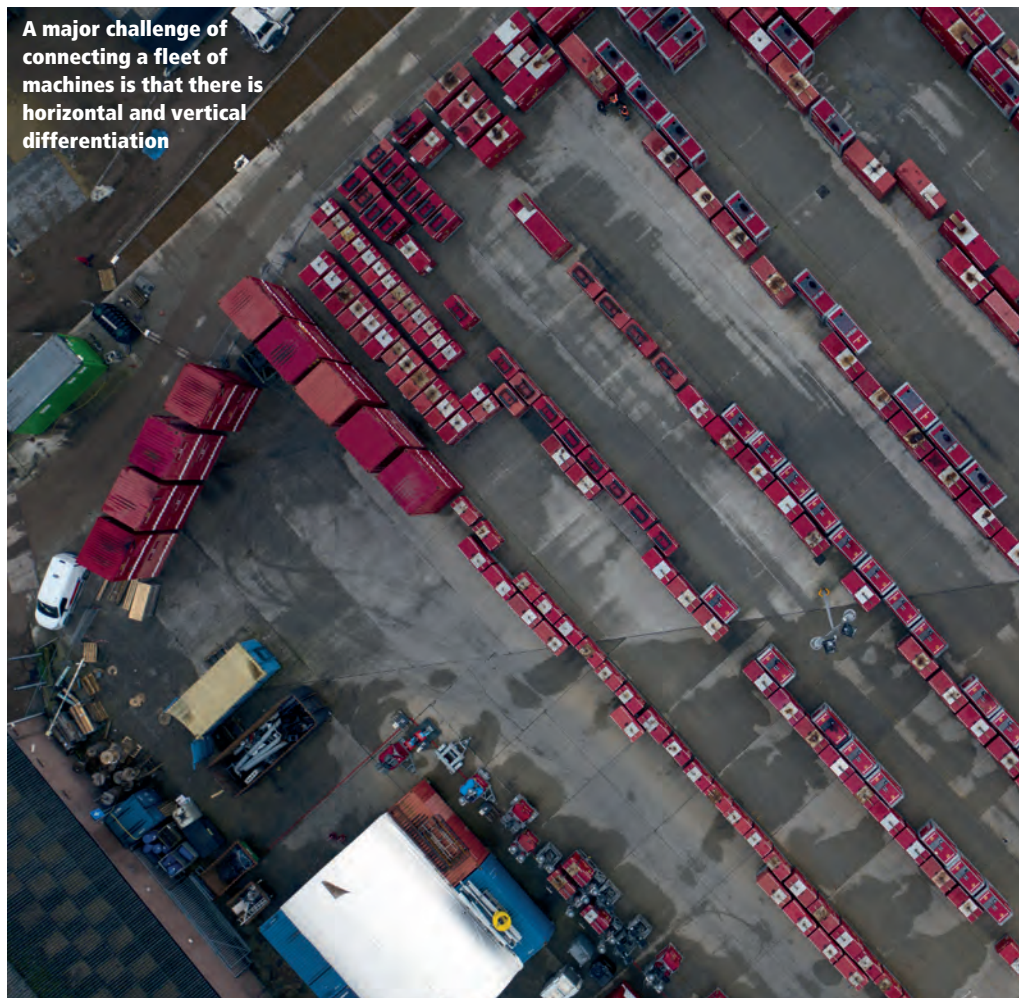
To get a better idea of the three main criteria for achieving the ROI on an IIoT project, I always envision it as a triangle.

The left side of the triangle focuses on hardware and subscription costs. Placing hardware that can measure everything in the machine is expensive. A cheaper option is a proxy, but this limits functionality.



**Ease of installation is an important factor in designing IIoT hardware**

**A major challenge of connecting a fleet of machines is that there is horizontal and vertical differentiation**



## About the author



**DICK KLAASSEN** is the founder of Xeelas, a Netherlands-based company that offers a tracking and monitoring solution for mobile construction equipment, using Internet of Things technology.



Measuring everything will also generate more data which will cost more to send via a mobile network.

The right side focuses on the amount of information the hardware provides: the more data you receive, the more of it you can use for operational matters, which you can digitalise.

The bottom of the triangle details the time it takes to put the hardware into the machine; the longer this takes, the more it costs.

Maybe a quick look at how current IIoT suppliers solve the scalability paradox will help show why ROI's have been difficult to make for assets with large variations.

### Scalability shortcuts

There are two main categories of scalable options available in the current market, but each has its own drawbacks. First, suppliers of specific brands of machines offer their own monitoring applications. For instance, Comap for generators, Daikin in cooling and Kaeser in the compressors. In the factory, it is easy to add communication units resulting in a low cost of installation.

But if you have a large fleet of machines, it will likely include a range of brands. Smoothly working with loads of different tools and providers is impossible. In short, though the applications that suppliers offer are scalable, they will not work for what you are trying to do.

The second option comes from what I like to call the 'Portal People'. Most IIoT players will offer you a beautiful multifunctional portal. To achieve scalability, they offer very basic hardware that they will give fancy names like "M7-Lite telematics device" or "Raw: A one-box-fits-all solution" while hiding the fact that it is just a GPS tracker with some open/closed contacts. The downsides are straightforward: most of their portal functionality you already have in your existing ERP systems and



Connecting the fleet is only the beginning of the journey, says Klaassen

the hardware does not offer much value by way of data gathering.

### Creating true scalability

Well, if vendor specific or portal-based IIoT does not work for most industrial machines, how do we achieve a valid business case for your fleet? First, we must acknowledge that solving the problem of high variation in physical assets lies in the physical world. It is in the hardware. What we want is low purchase and data prices, lots of great operational information for our machines and ease of installation. Installation also includes battery changes as they are also time consuming.

Solving this requires a thorough knowledge of mobile industrial machines, their protocols and available sensors. Then you design a printed circuit board that will cover 80% of all the requested functionality for 20% of the price. By adding charging capacity via the machines' circuits or via integrated solar panels, you will never have to change batteries. In addition, you find special back-up batteries that charge in negative temperatures and integrate a wireless protocol so the customer can add sensors throughout the machine without having to run any wires. Lastly, you make the whole thing as plug-and-play as possible.

Of course, you will still need to make a brilliant piece of firmware that will control this hardware and has the precise combination of low power operation and providing high levels of information without sending lots of data. Add this to a backend that will integrate seamlessly to your existing software application like ERP or PDM, and you have created a solution that can connect almost any machine with low costs while still giving you loads of information about your operations.

### Are we there yet?

I wish I could say that after connecting your fleet that is the end of the story. Unfortunately, this will be only the first step in a very long journey. For me, the essence of what I do comes down to this: how do you make sure the right information reaches the right person at exactly the right time. This means that in modern companies a lot of different software systems need to work together to make it happen.

I believe that in the end IIoT is just a small part of that. It is a vital part that can make a lot of difference but, nonetheless, not the leading system in most companies. So here are some things I learned along the way about how to structure your IT infrastructure after adding an IIoT component:

There is only a "single source of truth" for every bit of information in your system. You do not want to update information in several systems. For instance: where is machine information like tank size, control unit and software version stored? Make sure most information is in your main system and not in a separate portal.

Work in the cloud! Even though you probably have great reasons to keep everything on premise, it is difficult to argue with the scalability and interconnectivity options of cloud platforms. Of course, it is scary but it is inevitable, so why hold it aside?

Use the IIoT provider's portal for stuff that is not available in ERP. Think node management (which hardware gateway belongs to which machine), geofencing (status changes based on location) and user management if you want to give your customers access.

Managing IIoT gateways installation, changes, subscriptions and firmware updates for a fleet of machines is not your ordinary IT work. Your IT department probably will not be able to handle this, so make sure your IIoT is a partner and not a vendor. You will be working together closely for a long time, so it is important to make sure it is a partner you trust.

Of course, there is a lot more to it but hopefully you will take these points into consideration before jumping into your next big Industrial IoT adventure.

### Where are you in the connectivity process?

One of the most important components of your IoT project's success is getting sufficient information about the machines – as much as you can. I am convinced that this should be considered the norm in the industrial rental sector.

I am curious, where are you in the connectivity process of your fleet and what challenges do you face?

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# Rental growth across the board

## Another year of growth in all European rental markets in 2019 despite an end in the cycle

The European Rental Association (ERA) has released its 2020 Market Report. Developed with the support of the ERA Statistics Committee, the ERA Market Report has been the reference source of intelligence for the European equipment rental market since 2008.

The building of a solid data foundation remains at the centre of the report. This year, more than ever, providing a clear picture of the short- and medium-term outlook for the rental market is critical not only for rental companies, but also for equipment manufacturers.

This edition, comprising market trends and international comparisons, uses a common methodology and definition to analyse 15 European markets, with detailed market size results for 2017-18 (actual), 2019-20 (estimates) and 2021-

22 (forecasts). These countries account for more than 95% of the equipment rental industry in the EU, European Free Trade Association (EFTA) and the UK.

In 2019, equipment rental companies and other companies providing rental services generated a total rental turnover of more than 27.7 billion in these countries (EU-EFTA-UK).

The release of national statistics varies across the region and this year there are only two countries, Germany and Austria, for which 2018 Eurostat data is available. For all the other countries, only 2017 figures are available. Therefore, for those, the 2018 and 2019 figures were based on forecast drivers.

At a constant exchange rate, the equipment rental industry in the 15 countries saw growth of 4.1% in 2019. In 2020, there is an estimated decrease of 10.4%, with 2021 forecast to increase by 4.8%, also at a constant exchange rate.

The headline conclusion from this year's report is that 2019 was a year of growth for all the markets covered. This growth, however, was at different stages, with some markets already slowing down (France, Belgium, Sweden) and others still reporting robust growth (Germany, Poland, Italy). The first quarter of 2020 reflected these dynamics.

The Covid-19 pandemic, however, hit European economies over the second quarter of this year. The immediate impact differed from country to country. The Nordic countries, which did not lockdown and had almost no site shutdowns, have performed differently to southern Europe and the UK, which faced severe lockdowns and disruptions to activity. The UK has been further impacted by the uncertainty surrounding the Brexit negotiations.

The estimates and forecasts included in the report are based on assumptions at the end of September. The hypothesis is that there will be no further lockdowns across Europe apart from local and temporary restrictions. The forecast also does not factor in the development and mass availability of a vaccine.

It is important to stress the extreme conditions of 2020, which have been analysed with the forecasts for 2021. Large drops are expected this year, but significant rises – some of them due to technical

rebounds – are expected in the short-term, as well as in the medium- to long-term.

### About the Report

The ERA Market Report is the leading source of market intelligence on the European equipment rental market and the only Europe-wide industry benchmark. It contains detailed market information for the years 2016 to 2022 and key indicators, including rental turnover, fleet value and investments.

The results for the European rental market in the report refer to the renting of equipment without an operator. The figures are based on official statistics for NACE rev. 2 code 77.32: "Renting and leasing of construction and civil engineering machinery and equipment without operator."

It is produced for the ERA by IHS Markit, a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide.

The report is available digitally for ERA members (€500) and for non-members (€1,200). To order a copy, please contact the European Rental Association at era@erarental.org. **IRN**



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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.

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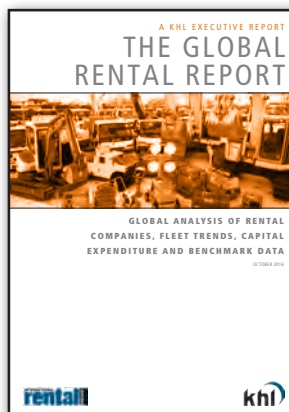
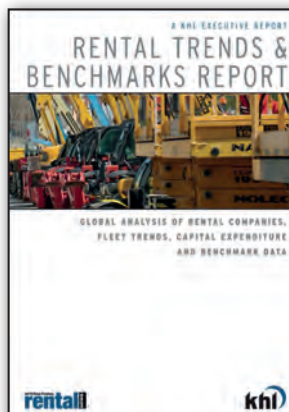


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