

INTERNATIONAL

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rental

NEWS

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**Kay Städing,
HKL Baumaschinen**

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**Tony English,
The Home Depot**

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Roadbuilding

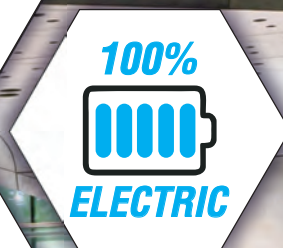
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Official magazine of the ERA



LIGHTING TOWERS | ACCESS | REGIONAL REPORT: JAPAN | LATAM RENTAL 45

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Pursuing opportunity

I admire the tenacity demonstrated by so many companies in this sector, be they rental businesses or manufacturers. This issue of *IRN* is full of stories about firms bravely facing the adverse conditions created by the Covid-19 pandemic, with a determination to find opportunity and pursue it.

In the HKL Baumaschinen interview on page 40, for instance, Kay Ståding speaks of the firm's "undaunted optimism" as it plans to open five new depots this year – the company's 50th year in business. Over that length of time, any company is bound to have encountered difficulties and it would seem HKL has learned how to turn a challenge to its advantage. That requires flexibility; the rental market is in constant flux, says Ståding.

Flexibility is also mentioned by Naohito Konuma, President and COO of Japanese rental firm Aktio Corporation, in our report on Japan on page 30. He says the rental industry is flexible "because it can serve a range of sectors, from construction and civil engineering to events". While the Japanese rental market has been hit by the severe impact of Covid-19 on the events industry – the most notable example being the postponement of the 2020 Tokyo Olympic Games – this is countered by the fact that restoration and mitigation work following a series of human and natural disasters in the country is helping to sustain demand for rented equipment.

Another company refusing to let the pandemic thwart its plans is Home Depot. On page 14, Tony English tells of the DIY giant's intentions to expand its rental offering by opening more rental outlets and migrating into larger equipment sizes. And this initiative comes just as Home Depot's largest North American competitor – Lowe's – announced its own national tool rental programme – see the news on page 6.

New opportunities have presented themselves not only in the physical world but also the digital sphere. The Covid-19 crisis has drawn into sharp focus the need for digitalisation in the sector. This is explored in the rental management article on page 42, but it will also be the topic of discussion in our next Rental webinar: Digitalisation in rental, on 13 October. Turn to the news pages for details, and go to KHL.com to register for the free event.

Enjoy the issue.

Thomas Allen
Editor

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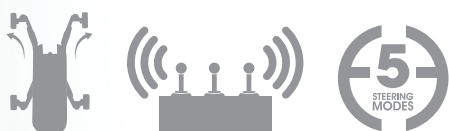
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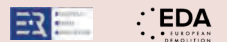
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inside

REGULARS**NEWS**

Kiloutou goes online with used equipment sales; Fluor sells AMECO Caribbean; Euroconstruct forecasts slow recovery; Digitalisation in rental webinar: speakers announced.

THE APPLETON COLUMN

Kevin Appleton considers what companies can do to manage the effects of the pandemic.

ERA PAGE

The European Rental Association has developed a Sustainable Supplier Framework.

EVENTS**PREVIEW: IRC**

The International Rental Conference will be held in Shanghai the day before Bauma China, with a slightly different focus.

PREVIEW: BAUMA CHINA

Messe München is forging ahead with its big construction show in China, as the Chinese government makes efforts to stimulate the economy by raising infrastructure investment.

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FEATURES**INTERVIEW: HOME DEPOT 14**

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**ACCESS**

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Restoration work on recent disasters in Japan is helping buoy demand for rental equipment during the pandemic.

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We look at two approaches to bringing rental customers an up-to-date online service.

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...outside

Dynapac's new
Seismic-enabled
rollers monitor
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DIARY DATES

2020

ALH CONFERENCE

23 October, 2020

Online event

IRN WEBINAR:
DIGITALISATION
IN RENTAL

13 October, 2020

Online event

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

London, UK

IPAF SUMMIT

18 March, 2021

London, UK

Kiloutou goes online with used equipment sales

France-based rental firm Kiloutou has gone online with the sale of its used equipment by creating a private sales website.

This is an update to the Kiloutou Second-Hand Equipment service, which was created in 2016 to sell its used equipment. Through this service, Kiloutou grouped equipment lots into different families, from forklift trucks to generators, and then directly contacted brokers to bid on the equipment.

With the latest development, Kiloutou is changing the buyer's experience by offering an online sales platform.

Xavier Panien, Second-Hand Equipment Sales Manager at Kiloutou, said, "Initiated in France over four years ago, the Kiloutou Second-Hand Equipment service had to keep step with the Kiloutou Group's international development.

"In this context, our digitisation policy now allows us to open up the sale of all our second-hand equipment found in our European agencies more broadly via an unprecedented tool for private sales perfectly tailored to the expectations of specialist brokers."



Used equipment listed on the platform can be filtered according to various criteria

Designed as a private sales site, the platform is open to a limited number of international professional buyers who are approved by Kiloutou.

Each year, 12 online sales events will be held, with approximately 400 items of equipment available at each event. Tools are not included.

The equipment can be filtered

according to various criteria, such as type of equipment, brand, general condition, location and in-service date.

Each item of equipment has an accompanying data sheet that includes information such as equipment model, general condition, mileage and engine hour meter reading, as well as photographs.

In 2020, the next private sales will be held on 18 September, 16 October and 13 November.



Tran Ly, General Manager of US-based equipment rental software company Wynne Systems, says good companies take recessions as an opportunity to invest in digital technology to get an edge on their competitors. Listen to the full podcast at KHL.com.

Fluor sells AMECO Caribbean

Global construction contractor Fluor has sold its Jamaican equipment rental business AMECO Caribbean to Stewart's Automotive Group (SAG) for \$22 million.

SAG is a Jamaican car sales and rental business that has an industrial division, Stewart Industrial, which sells construction equipment, including models from JCB and Komatsu.

AMECO has been in Jamaica since

2001. The new company will operate as JAMECO Equipment Company Limited.

In September 2019, US-based Fluor announced plans to divest its AMECO rental business in order to focus on its core markets. This is the first sale in that process.

Jackie Stewart Lechler, JAMECO Equipment Company, said, "JAMECO Equipment Company Limited looks forward to continuing the fine tradition of premier fleet management service to which AMECO customers have become accustomed, to be complemented by the owner's transport industry experience."

Stewart's Automotive Group is a family-run car dealership operating in the English-speaking Caribbean and based in Jamaica, selling brands including Jaguar, Land Rover and Mercedes Benz, and operating a car rental business.

Since 2010 it has also run a construction equipment dealership – Stewart Industrial – with brands including Komatsu, JCB and Clark.

This deal in Jamaica follows the recent sale by Stork – part of Fluor's Diversified Services segment – of its Dutch equipment rental business EQIN to private equity buyer VE Partners.

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.

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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.



Takeuchi has launched the TB257FR compact hydraulic excavator with the company's patented side-to-side (STS) offset boom combined with a tight tail swing that allows it to fully rotate with very little overhang. The newest excavator in the FR Series, which features a full-rotation (FR) design, this new machine replaces the TB153FR. Available in many areas of the world already, the TB257FR is being officially introduced to the US on 21 September, 2020.



NEWS IN BRIEF

■ UK-based rental company Speedy Hire has reported a 35% reduction in road collisions and a 40% fall in the cost of 'at-fault' claims for its fleet of delivery and service vehicles, after two years of working with video telematics company VisionTrack. VisionTrack's multi-channel digital video recorder was initially used on Speedy's heavy delivery trucks, providing five cameras connected to the cloud-based IoT platform Autonomise.ai. Since then, Speedy has installed VisionTrack's VT2000 connected cameras on all small light vehicles and digital videos on all its new commercial vehicles.

■ Australia-based equipment rental firm Kennards Hire has opened a new depot in Dunedin, the second largest city on New Zealand's South Island. As Kennards' 27th depot in the country, the 3,000m² facility is strategically positioned to support a growing demand for construction equipment in the area. Local governments were said to be investing heavily in infrastructure to improve the coastal area and waterfront around the Dunedin and Otago/Southland region. New Zealand General Manager, Tom Kimber, said, "We see the city and surrounding Otago area as an extremely progressive part of New Zealand."

■ A London, UK company that has provided a mobile App-based rental service for skip rental has raised £1.2 million in funding to help it expand into different types of construction equipment and nationwide. Skrap, which acts as an online broker for rental products and does not own its own equipment, started in 2017 by focusing on London's skip hire market, and now intends to add the supply of concrete, portable toilets and wider construction machinery. By the end of 2021, the company aims to provide coverage in all major UK cities through its mobile App.

Euroconstruct forecasts slow recovery

The latest briefing from construction market forecasting network Euroconstruct predicts a slow recovery for European construction in 2021.

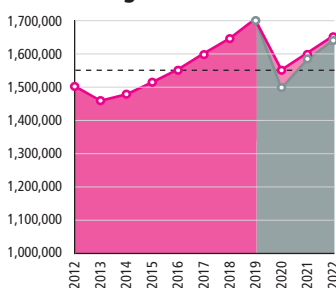
The report also looks ahead to construction output in 2022, forecasting it will, on average, remain below the level achieved in 2019.

Euroconstruct has combined figures from its 19 European member nations, resulting in a forecast of an average 9% decline by the end of 2020.

The UK is predicted to be the market hardest hit by the coronavirus pandemic, with the 2020 decline across the Euroconstruct nations averaging just 7% when the UK's figures are excluded.

The report shows that markets in

Graph showing Euroconstruct's June and August forecasts



Source: EUROCONSTRUCT, August 2020

the Nordic countries are remaining stable, with the total market in 2021 (bar Sweden and Finland) expected to return to around the level of 2019.

Digitalisation in Rental webinar: speakers announced

On Tuesday 13 October, 2020, KHL will be hosting the third of its rental webinars, this time on the theme of digitalisation in the rental industry.

The speakers confirmed for the online event are:

- Andrea Guzzoni, Chief Executive Officer and Co-Founder of Rentuu
- Joel Särkkä, Chief Information

Officer of Renta

- Søren Jensen, Chief Commercial Officer of Trackunit

The expert panel will discuss how digital technologies are changing the way the rental industry works, from using artificial intelligence for fleet management to providing rental customers with online channels.

Among the topics discussed will be the effect of the Covid-19 crisis on adoption rates. Has the pandemic opened the industry's eyes to the importance of digitalisation?

You can register for the free webinar at KHL.com.



New electric tracked carrier from JCB

JCB has added to its E-Tech line with the introduction of a new electric version of its HTD-5 Dumpster tracked carrier.

The new high-tip, walk-behind HTD-5e E-Dumpster has a capacity of 500kg and a ground clearance of 1,450mm in tipping position.

Its electric drive makes it particularly suitable for urban and indoor jobs with restrictions on noise and air pollution.

Powered by a 48V lithium-ion battery pack that can be recharged within 2 hours using a standard 240V or 110V electrical supply, the E-Dumpster can travel at speeds of up to 3km/h.

JCB says service and maintenance requirements are significantly reduced by the lack of an internal combustion engine.

The new model joins JCB's growing range of electric equipment, which includes the 19C-1E electric mini excavator.



JCB's new HTD-5 Dumpster

IRN Rental Share Index

COMPANY		SHARE PRICES			
		Start date 07/01/06	Previous mth 16/07/20	Current mth 07/09/20	% change
Aggreko (UK)	£	2.75	4.3	4.33	0.7%
Ashtead Group (UK/US)	UK£	1.83	33.5	33.34	-0.5%
Cramo (Fin)	€	13.0	13.23	13.23	0%
Emeco	US\$	—	0.9	0.86	-4.4%
GAM SA (Spain)	€	8	1.14	0.99	-13.2%
Herc Rentals	US\$	—	34.79	42.26	21.5%
HSS Hire	UK£	—	24.6	26.8	8.9%
H&E Equipment	US\$	—	18.84	21.36	13.4%
Kanamoto	Yen	—	2395	2263	-5.5%
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	0.53	0.52	-1.9%
United Rentals (US)	US\$	24.9	159.6	176.43	10.5%
VP PLC	UK£	—	7.27	6.22	-14.4%
IRN INDEX		100	401	416	3.7%

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



ON TWITTER



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Mecalac Construction Equipment UK appoints new General Manager. Mecalac Construction Equipment UK has announced the appointment of Juergen Kreienbaum as General Manager.

@cwchamber

17 August, 2020



Look what just arrived to our Powered Access Range... @HINOWA_SPA 15.70 IIS Tracked Spiderlift, this Diesel / 110V model comes with non-marking tracks offering an impressive working height of 15.4m & max outreach of 6.6m.

@ApsIreland

21 July, 2020

Busy week so far for us. We have added another Electric JCB to our growing fleet.

@diamond_hire

25 August, 2020

Schrader celebrates 30 years at Zeppelin

Peter Schrader, Managing Director of Zeppelin Rental, is celebrating his 30th anniversary with German Caterpillar dealer Zeppelin Group.

He has been with the group since it first began to rent equipment, and it is under his leadership that the rental business has grown to be a major player in the European rental market.

Schrader joined Zeppelin Group in 1990 as a salesman; "At that time, rental was mainly used to prepare the sale of Caterpillar construction machinery. It wasn't until I became Branch Manager three years later that we started institutionalising rental."

The first of the company's rental depots were opened at this time.

The acquisition of MVS (Miete Vertrieb Service) AG in 2003 marked a milestone in the development of the



Peter Schrader,
Managing Director
of Zeppelin Rental

rental business.

MVS Zeppelin GmbH & Co KG was subsequently founded on 1 January, 2004, and Zeppelin's rental business became a market leader with 120 depots and a fleet of more than 33,000 units.

Schrader says, "Our vision for the rental business also went beyond the mere provision of individual machines and equipment. Our goal was to be an indispensable service provider for our customers."

While Schrader expresses pride about the growth of Zeppelin Rental over the past 30 years, he says, "My main focus is on the future. So I look forward to the many exciting challenges and projects that await us."

US DIY giant Lowe's targets rental

One of North America's largest DIY chains, Lowe's, is to create a national tool rental operation, with a "multi-year" programme of store openings. The first store in Charlotte, North Carolina, will open on 20 August.

Lowe's said its in-store tool rental centres will offer equipment for both homeowners and professional customers, with each location being around 370m², including areas for equipment servicing, cleaning and demonstrations.

By expanding into rental, Lowe's is following in the footsteps of The Home

Depot, its major DIY competitor, which has been offering tool rental for 25 years, generating almost \$1 billion in revenues.

Lowe's is also no stranger to rental, with Sunbelt Rentals (and before that NationsRent) having leased property from Lowe's to run rental stores alongside the DIY stores. These rental operations were operated separately from Lowe's.

Products at the new stores will include power tools, drain cleaning, restoration, sanitation and concrete tools.

PEOPLE NEWS

■ UK-based rental firm Speedy Hire has appointed **James Bunn** as its new Chief Financial Officer (CFO). He will start in the role on 14 September, 2020. Bunn replaces Chris Morgan, who stepped down as the group's finance director on 31 July, 2020. Most recently, Bunn has worked as CFO of the UK Digital division of GVC Holdings.

■ Durante Rentals has appointed **Liam Harrington** as its new President. Harrington previously served as Durante's COO since May 2019. Harrington has more than nine years of experience in the construction equipment rental industry and previously worked as CFO and VP of finance for Safway Group and as director of finance at United Rentals.

■ Sinoboom's European operations continue to grow with the appointment of two well-known industry figures to represent it in the UK and Spain, with immediate effect. **Julie Houston Smyth** will lead Sinoboom's activities in the UK and Ireland, while **José Miguel Peña** takes on responsibility for Spain and Portugal. Smyth has more than 25 years' powered access industry experience, while Peña has been working in the sector for more than 20 years.

■ US-based forestry and tree care manufacturer Morbark has named former Skyjack President **Brad Boehler** its new corporate leader. Boehler will succeed Dave Herr, current Vice President of Alamo Group's Forestry and Tree Care Business Unit and President of Morbark Holdings, effective 24 August.

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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rental newsletter

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Dingli Announced "Whole Series Of Products Has Been **Electrified**"



Boom Lifts **16m ~ 30.3m**

Scissor Lifts **5.9m ~ 22m**

Vertical Lifts **4.7m ~ 11.2m**



Dingli takes 24% stake in Teupen

Dingli has acquired a 24% stake in Germany-based tracked platform specialist Teupen.

The investment in 24% of Teupen's shares will play an important role in the Chinese manufacturer's growth in Europe, said the company, and include new product development across the access product line, including large boom lifts.

"Through technology sharing with Teupen, both parties will jointly develop a series of self-propelled boom lifts with large load capacities

and large working heights, 36-50m, and cooperate with a full series of electric equipment, including boom lifts, scissor lifts, vertical lifts, etc., to create a whole series," said a Dingli spokesperson.

Zhejiang Dingli was placed sixth

in *Access International's* AccessM20 listing of the world's largest access equipment manufacturers, published in the June issue of the magazine.

The company said the investment in Teupen would also enhance its market competitiveness with rental

companies in Europe, as well as adding an extensive range of tracked platforms to its product offering. To complement this, Dingli will establish a new European research and development centre (R&D Germany), at Teupen's headquarters in Germany.

As part of the investment, Dingli plans to help Teupen with the development of new products



Exclusive podcasts



Zoomlion North America's Nicky Zhang and Dan Schneider talk about the company's plans to launch access products in North America.



Doug Rawlings, President of the Elevating Work Platform Association of Australia (EWPA) and State Manager for Western Australia at United Forklift and Access Solutions, discusses the major issues with A's Euan Youdale.



Alessandro Mastrogiamomo, export sales director at Italy-based tracked platform manufacturer CMC, talks about market conditions and business practices during Covid-19 and in the years ahead. Mastrogiamomo also shares exclusive news about product developments.

Zhongneng United partners with XCMG

Chinese rental company Zhongneng United recently confirmed a new partnership with aerial platform manufacturer XCMG.

The signing of the strategic agreement between the two companies on 5 August took place during a visit by Zhongneng United to the XCMG Fire-Fighting facility, where it manufactures MEWPS.

The agreement will see closer alignment in product development, service, market expansion and brand awareness, to create greater value to the customer and grow their influence.

Yang Tian Li, Chairman of Zhongneng United, which says it has more than 30,000 units in its MEWP fleet, took a tour of the aerial platform production facilities at the XCMG plant and praised the level of technology.

Yang said, "It is expected that through this cooperation, we can strengthen ties, expand areas and achieve more results."

Li Qian Jin, General Manager of XCMG Fire-Fighting, said he hoped both companies could take full advantage of the opportunities that lie in the access market.

Haulotte appoints Africa distributor

Haulotte Africa has signed Premium Group as an authorised distributor of its aerial platforms and telehandler products in 12 African countries.

The French manufacturer said the partnership will enable it to provide better local service support to end user contractors and rental companies in Morocco, Senegal, Guinea Conakry, Mauritania, Côte d'Ivoire, Burkina Faso, Niger, Cameroon, Chad, Mali, Togo, and Benin.

Based in Morocco, the Premium Group is well-established in the people and material lifting equipment

industry. Its existing distribution network and experience will enable Haulotte to better address the African customers' needs.

Premium will have its own stock of Haulotte equipment and spare parts for rapid deliveries and service. Didier Mertens, General Manager of Haulotte Africa, said, "We are pleased to announce this distribution agreement. Africa is a growing market which is asking for high-quality aerial equipment. This partnership will extend our geographic coverage and allows us to meet the increasing demand".

NEWS IN BRIEF

■ Alimak Group is set to acquire US-based building maintenance unit (BMU) services provider Verta Corporation. Verta Corporation provides maintenance, parts, inspections and project consultation for BMUs in the US and Canada, and has a large fleet of Manntech units. Verta Corporation's revenue in 2019 amounted to \$3.1. The firm will become a part of Alimak Group's After Sales business segment.

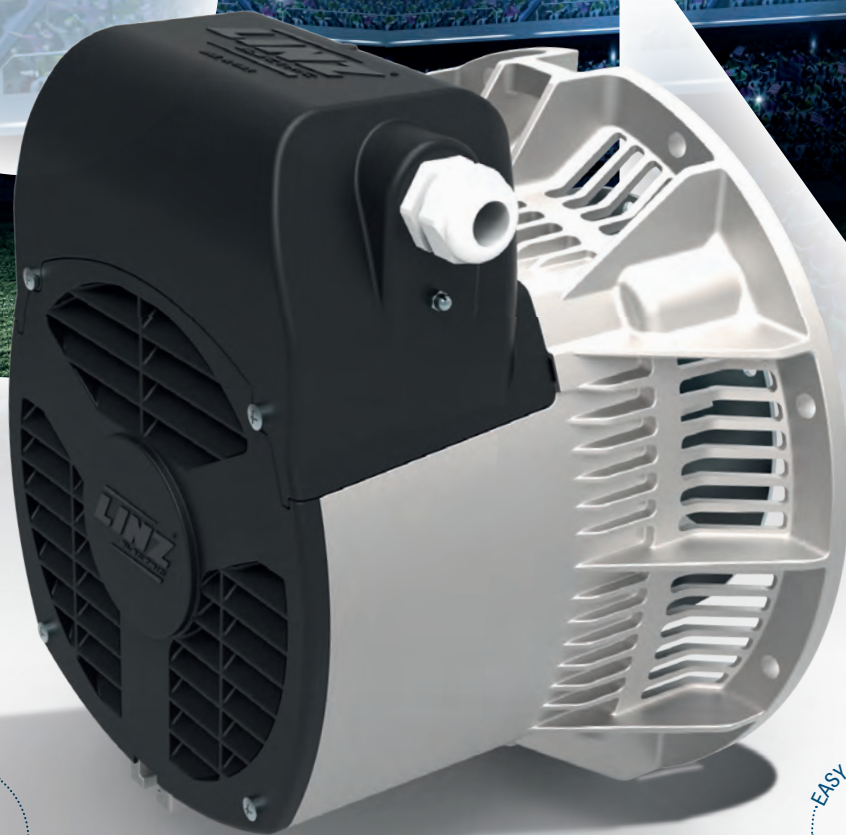
■ Niftylift has launched its second-generation hybrid system, named Gen2 Hybrid. The UK-based company was the first MEWP manufacturer to offer a true parallel-hybrid powertrain, when it was introduced on the HR21 4x2 in 2007. The new Gen2 Hybrid system is powered by an EU Stage V diesel engine, which is automatically boosted by an electric motor when extra power is needed.

■ Snorkel distributor Ahern Ibérica is expanding its product portfolio with Dinolift products in Spain and Portugal. The distribution agreement with Dinolift, which is effective immediately, will see Ahern Ibérica offer a range of 23 Dino lifts and provide technical service and spare parts support for existing and new Dinolifts in the market. The product line includes a full selection of lightweight, yet high specification, towable and self-propelled articulated and telescopic boom lifts, as well as tracked spider and vehicle mounted boom lifts.

■ Hilti North America unveiled the EXO-01 wearable exoskeleton, a new human augmentation device to help commercial contractors, tradesmen and management tackle health and safety as well as labour shortage challenges. To create the EXO-01, Hilti Group has entered a technology partnership with Ottobock SE & Co. KGaA, supplier of prosthetics, orthotics and exoskeletons.

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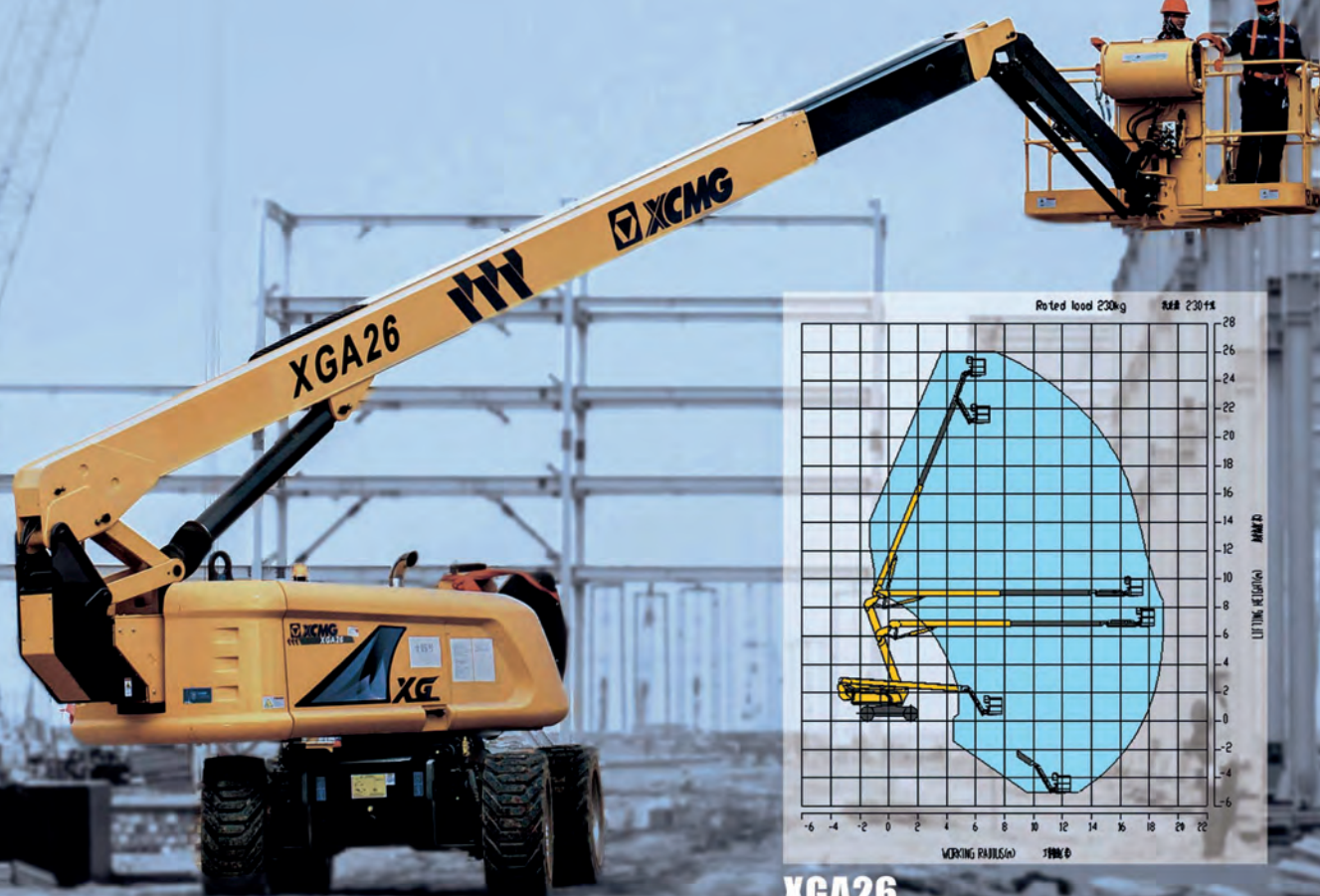
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Covid working

Kevin Appleton **considers what companies can do to manage the effects of the pandemic, which includes keeping some perspective on the situation**

The industry is now decidedly back to work (not that it ever really stopped) and seems to be recovering well from the pressures brought about by reactions to the Covid pandemic. Some parts of the industry (heavier plant, in the main) even seem to be benefitting from a desire on sites to maintain strict social distancing and reduce the amount of equipment sharing. I'd be interested to hear alternative views, but it seems to me that what we're seeing is more rental equipment per site being ordered across a general level of end-user activity that is still perhaps 10%-15% down on where it was a year ago, such that overall business levels in rental are about flat (more equipment per site balancing out the generally lower output on sites).

Whilst this makes the rental industry more resilient in the short-term it does mean we have to keep an eye out on the general economy. If there isn't a recovery in construction output (probably supported by government expenditure programmes) then we might be in for a relatively extended

period of flat, or mildly-declining, demand.

In any event we need to ensure that our industry is playing its part in managing the effect of the virus on the wider population and, therefore, the economy. Businesses have a number of things to consider in this respect.

Control the controllable

There is a lot that can be done in terms of encouraging sensible social distancing (floor spacers, maximum numbers allowed in indoor spaces, layout of offices, meeting rooms, canteens and so on) and it is also possible to encourage customers to play a part in this effort too.

Encouraging customers and other visitors to use masks in indoor depot spaces may or may not help arrest the spread of the disease through exhaled droplets (the scientific jury still seems to be split on this) but at the very least it is a visible reminder that care is necessary and, coupled with hand sanitising stations and hyper-regular cleaning of common touch points (door handles, desk tops, equipment controls), serves to remind people that it's good to be vigilant. Companies will have their own views on how to deal with customers (or staff) that don't want to help-out, but I'm generally a fan of communication and education, rather than punishment.

As a side comment, in the companies I'm involved with, there has been a general reduction in sickness absence through the Covid crisis. I do wonder if we have things to learn about the possible long-term productivity benefits of a more rigorous approach to workplace hygiene and infection control. At least anecdotally, it seems we don't have to accept the view that "people just get sick" quite as readily as we (or, at least, I) have in the past.

Keep some perspective

Every death is a tragedy for the loved-ones of the deceased. That goes without saying, but (and I'm expressing a personal view here) the chances of someone without prior medical conditions actually dying of Covid appears to be relatively small. South Korea is widely recognised as having one of the most extensive (non-symptom led) testing regimes and a strong programme for follow-up and isolation, together



with a strong cultural support of good hygiene practices generally. Cumulatively it has held deaths to just over 300 at time of writing. In western Europe, since testing started, confirmed infection rates have cumulatively reached around 5,000 per million of population but daily deaths per million of population have rarely exceeded 10 or .001% of the population (Source: OurWorldInData.org). Again, I am not trying to diminish the tragic effects of this virus at an individual level, but there is also a relatively low statistical likelihood of one of your healthy employees or customers dying from it.

It seems to me (and there is some medical research evidence to back this up) that there is a significant threat from anxiety about the virus, or just about interacting with other people, which will also be significantly damaging if not addressed. It is good to simultaneously be encouraging people back to work, encouraging them to take sensible precautions, but also to emphasise that this is not like being in the trenches of the First World War. In the long run, anxiety can be a very debilitating condition to manage too.

IRN

“ A lot can be done in terms of encouraging sensible social distancing and it is also possible to encourage customers to play their part. ”



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

Giant steps

The Home Depot in the US is intending to take its Tool Rental business to the next level, with larger equipment and an expanded customer base. Murray Pollok spoke to Tony English, Senior Merchant for Rental at the DIY giant

If a globally renowned brand with US\$110 billion in annual revenues said equipment rental was a big opportunity and it would be making “significant investments”, you would sit up and take notice.

In fact, it has already happened. North American DIY giant The Home Depot said last year that an expansion of its almost \$1 billion revenue in-store rental business was firmly in its sights, with key targets being more rental stores, a migration upwards in equipment sizes, and an increased focus on serving the professional customers who are the biggest spenders on rental.

Leading this rental expansion is Tony English, Home Depot’s senior merchant for rental. An experienced supply chain and procurement specialist at Ingersoll Rand and then Sunbelt Rental – where he worked for almost six years – English has spent the last nine years focused on the DIY chain’s rental operation.

It is already a massive business. Started in 1995 with trial rental centres in Nashville, by last year it had grown to become a \$940 million concern – behind only Sunbelt, Herc Rentals and United Rentals in North America – and with a target to exceed US\$1 billion this year. Eight years ago, the rental business was less than \$400 million, which corresponds to a compound annual growth rate of 12%. (The pandemic has had an impact on Home

Depot, of course, but not halted its growth – see box story overleaf.)

“Now we are growing the larger equipment business very aggressively”, English tells *IRN*, “We want to cater to larger Home Depot customers and go as large as their needs require. We have a vision to take a step or two up the equipment ladder, but we’re doing it carefully... it’s a growth opportunity that we are putting energy and resources into.”

One reason for this is the fact – revealed by the company last year – that while 90% of its professional customers rent equipment, only 25% of them were renting from Home Depot.

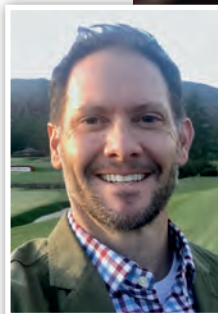
(The initiative comes just as its largest North American competitor – Lowe’s – announced its own national tool rental programme. See our news story in this issue, page 8.)

Deeper range

To target these customers, the aim is to provide a deeper range of large equipment. Investment in this segment has increased “meaningfully” over the last three years, and the business has already focused for many years in the compact equipment sector, in particular through its 2009 alliance with Compact Power Equipment Centres – the business run by Roger Braswell.

Compact Power placed rental yards at selected Home Depot stores and rented small skid-steers, excavators and tool-carriers which could fit in a traditional US pick-up truck or on small trailers. That ‘non-tool’ equipment was supplemented by small scissor lifts and towable aerial platforms.

“We called that towable equipment – any mini excavator, skid steers, that could fit on a trailer,” says English, and typically weighing under 10,000



Tony English, Home Depot’s senior merchant for rental

pounds. That represents around 20% of its rental business. The Compact Power business eventually expanded to 1,000 Home Depot stores and

was fully acquired by the retailer for \$265 million in 2017.

The current shift to larger equipment will mean going beyond the carrying capacity of a pick-up or small trailer and will require larger trucks, with Home Depot offering a delivery service.

“That will take real-estate, training, people”, says English, “We’re proceeding down that path very deliberately.” There will be a hub and spoke strategy, with larger equipment and delivery services located at the hubs.

How quickly this will be done depends on the results. He points out, as well, that although Home

“We want to cater to larger Home Depot customers and go as large as their needs require. We have a vision to take a step or two up the equipment ladder, but we’re doing it carefully... it’s a growth opportunity that we are putting energy and resources into.”

TONY ENGLISH,
Home Depot’s Senior Merchant for Rental



A JLG T340 towable boom lift at one of Home Depot’s stores. The rental fleet includes more than 2,000 aerial platforms



Small tool rental remains the core activity of the Home Depot's rental business

Depot has been delivering equipment for five years, the infrastructure to do this is still in its infancy.

In terms of the equipment involved, what will it mean? "We're going to compare to the bread and butter of what a large equipment rental house would offer – such as 2,000 or 2,500 pound capacity skid steers", says English. "That's where we're going."

The larger range will include tandem rollers, rough terrain telehandlers up to 6,000/8,000/10,000 pound sizes; excavators up to the 4.5-5.0 US ton range; and tractor backhoes.

Moving up

The 'moving up the ladder' metaphor is appropriate for its aerials business. Most of its MEWP fleet of more than 2,000 units comprises small electric scissiors and towable booms, but English says "for several years we have been evaluating how much larger we will go. We believe 60ft is probable and 80ft booms. Above 80ft is unlikely."

Its 'heavy equipment' catalogue now includes self-propelled booms up to the Genie S-85XT and JLG's 860 SJ – both telescopic – as well as the articulated JLG 800AJ and Genie Z-80/60. Below that there is a mix of 45 and 60ft JLG and Genie articulated and telescopic booms. On scissiors, the range now goes up to a 32ft working height rough terrain Skyjack model, although most of the smaller models are Genie and JLG, with some of Custom Equipment's Hybrid scissiors at the lower end.



A 2,300 pound capacity Kubota SVL75-2 on the cover of Home Depot's large equipment rental catalogue



Home Depot's tool rental business was started in Nashville in 1995 and is now offered in more than 1,400 stores in the USA and Canada



In-store story

The Home Depot's DIY in-store rental operation is without a serious rival in North America, although it will soon face more competition from rival DIY chain Lowe's, which recently announced that it will pursue its own tool rental programme.

Lowe's move will not be its first foray into rental: for more than 15 years it has leased space at some of its stores for rental operations run by Sunbelt Rentals (which were taken on from NationsRent following its acquisition in 2006 by Sunbelt's parent, Ashtead Group).

In Europe, it is a long-established rental model, with many builders' merchants and DIY chains providing rental services run by the chains themselves or outsourced to a rental specialist.

The UK, with its mature rental culture, has several examples of builders' merchants, such as Jewson and Travis Perkins, who offer tool hire operations at most of their stores, and run in-house. These are serious rental businesses, with annual revenues up to €100 million in Jewson's case.

In mainland Europe, the outsourcing model is more prevalent. For example, Kiloutou in France offers in-store rentals at the builders' merchants chain La Plateforme du Bâtiment. The undisputed leader here, though, is Boels Rental in the Netherlands, which, alongside its 430 stand-alone locations (not counting recently acquired Cramo) runs in-store rentals at many hundreds of DIY locations through partners including Hornbach (Germany, the Netherlands and Austria), Praxis (the Netherlands) and Brico (Belgium and Luxembourg).

None, however, have the scale of Home Depot's tool rental business.

Growth through the pandemic

While the rental sector worldwide has suffered during the Covid-19 pandemic – with second quarter revenue falls typically in the 15% to 20% range – The Home Depot saw second quarter sales increase by a remarkable 23.4% as its consumers invested more in home improvements during lockdowns.

The retail giant does not split out sales for its tool rental operation, but the company reported healthy growth in revenues from both its professional and homeowner customers, although led by homeowners. It is the professionals who are among the biggest users of its rental services.

Net profits for the quarter rose to \$4.3 billion on sales of \$38.1 billion, despite having to make additional Covid-related payments and benefits to staff of \$480 million during the period.

Speaking in mid-August at a conference call for financial analysts, Bill Lennie, Home Depot's Executive Vice President, outside sales and service, said, "We did see good Pro [Professional] sales growth across all cohorts, all end markets and all geographies. There was notable strength with the low-spend Pro.

"They were less impacted with the downturn in Q1 but continued to rebound and accelerate in Q2. The high-spend Pro also continued to rebound, and I would see that as being an outcome of permitting and job inspections coming back online. There are areas where homeowners are becoming more comfortable with having Pros and service providers in their homes."

The growth was achieved despite a 25% reduction in store opening hours during the peak of the lockdown.



A Boels rental location at a Hornbach store in Germany

smaller, domestic items such as floor and carpet cleaners from many of its stores, even where there is no dedicated tool rental centre.)

"We will expand to as many stores as makes sense", says English. "It depends on volumes,

location, proximity to other stores. We have a team working on that."

Despite the large scale of its rental business, you wouldn't really say that Home Depot Tool Rental competed directly with the rental giants of North America, although local 'mom and pop' rental businesses located close to a Home Depot would no doubt view things differently.

Customer base

Will that change with the addition of larger machines and the greater focus on professional customers? English plays that down; "I don't think we're going head-to-head. We want to take care of Home Depot customers and offer more convenience for them." That said, targeting the existing professional customers who already rent, but not from Home Depot, tells its own story.

The retailer has been a unique presence in the North American rental market for 25 years. Known about certainly, but, by virtue of its in-store format and focus on homeowner and smaller professional customers, not given quite the same profile as giants like Herc, Sunbelt and United. That could be changing.

IRN

– it drives footfall, drives projects and associated purchasing."

Alongside the shift upwards in product size, there will be continued expansion of the rental network. "We have rental locations at 1,281 of our 2,000 stores in the USA and we are found in 177 in Canada", he says. "That number has grown very quickly over the past five years or so, as the rental

concept has grown." He thinks that 1,800 rental sites within five years would be "fantastic".

That is a lot when you consider that, aside from the equipment, a typical Home Depot rental store could have around six employees, comprising a couple of technicians, two sales assistants, a department head, and mobile service technicians covering several stores. (Home Depot also rents



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Euan Youdale, **Editor of sister magazine Access International**, explores the latest trends in the access equipment sector

Adapting to the times

The new US-based ANSI standards, issued in June, have led to a surge in dual capacity boom lifts, while emissions regulations and stricter environmental controls in city centres have led to an expansion in hybrid and electric-powered access equipment that can match the performance of diesel powered lifts indoors and outdoors, across a range of applications.

JLG first previewed its electric EC boom lifts at Bauma last year. The EC450 and EC520 models are now in production, with delivery due in the third quarter of 2020. The mid-sized articulating booms are equipped with lithium batteries and can work a full day without charging. They are delivered as standard on non-marking tyres.

Laurent Montenay, General Manager at JLG Deutschland, says the demand for electric-powered products can only increase; "Rental companies and our customers are asking for new solutions and alternatives over conventional diesel to work in urban areas and we are working towards fulfilling those needs."

And he believes the choice of electric over hybrid is a forgone conclusion; "With lithium batteries becoming more accessible, there's no need for hybrids anymore. The performance is equal to that of a conventional diesel."

Pioneering

France-based manufacturer Haulotte launched the pioneering rough terrain electric articulating boom Pulseo Generation in 2018. The 20.76m working height HA20 LE Pro has a 72V battery pack and comes with an 18.5kW diesel Kubota range extender engine. A second unit in the Pulseo Generation range will be launched in the third quarter of this year, with more information becoming available soon.

Another calternative to lithium and traditional lead acid batteries, in Haulotte's view, is the emergence of fuel cells. "These are not batteries, but a device that can generate energy from the hydrogen contained in tanks and ambient air oxygen. Fuel cells provide good overall performances," the company says.

Manitou has chosen lead acid for its new electric 200 ATJ E rough terrain boom lift, which was presented as a prototype at Bauma last year and was officially released in the first quarter of this year.



Skyjack's dual zone SJ66T+

Fanny Sourisseau, MEWP Product Manager, said, "We wanted to make a reliable, robust machine with incomparable off-road capabilities. Our 200 ATJ E allows us to work at a height of 20m with a capacity of 230kg and two operators. To make life easier for our users, we ensure autonomy of at least one working day." It is also light, at 7,100kg.

"Lithium-ion batteries seem to be a big trend today," says Sourisseau. "It is true that they



MEC's lightweight 34-J



Manitou's 200 ATJ E



The EC520AJ from JLG

have many advantages, including extremely fast charging times. However, today, lead batteries are less expensive and a better known and mastered technology, especially in terms of recyclability."

Snorkel has accelerated the introduction of its electric lithium-powered lifts. In April 2019, the company previewed lithium-ion battery powered SL26RTE and SL30RTE Speed Level lifts, which entered full production in its UK factory last October.

Battery technology

At ConExpo this year, Snorkel showed the same lithium-ion technology in its line of compact rough terrain scissor lifts. The S2770RTE, S3370RTE and S3970RTE are available to pre-order and are scheduled to enter UK production in late 2020.

The Speed Level and compact rough terrain scissors are designed to deliver a long duty cycle to work a full shift and emit up to 60% less noise than the diesel equivalents. The battery packs have a built-in battery management system (BMS) and integrated electric powertrain. The lifts all offer four-wheel drive with zero emissions, while reducing running costs by up to 95% when compared with an engine.

Representing an industry-first, the new Snorkel SR626E delivers a maximum lifting capacity of 2,600kg, and a maximum lift height of up to 5.79m, while producing zero emissions in operation.

Matthew Elvin, CEO of Snorkel, says, "We are continuing to explore lithium electric technology, and are likely to expand its use into other suitable existing products, such as our S2255RT and S2755RT narrow compact rough terrain scissor lift models and mid-size boom lifts in the future."

China-based Dingli has confirmed that its full series of large self-propelled booms are now available as electric-powered versions.

Since 2016, Dingli has launched 14 boom lifts in the 24.3 to 30.3m working height category. Seven of the models are combustion engine-powered, while seven are electric-powered. The models have basket capacities up to 454kg. Dingli claims to be the world's only series production manufacturer of an electric-powered self-propelled boom with a



Sinoboom's GTZZ46J articulated boom

Bigger and bigger boom lifts

At ConExpo, Don Ahern, owner of Snorkel, told *Access International* (AI) that, following a great deal of research, he had been convinced there was a need for a much larger machine. Hence the world's largest boom lift was launched, in the form of the 64m platform height Snorkel 2100SJ. (You can see the full video interview with Don Ahern at www.khl.com/ai, in which he lays out all its specifications and the reasons behind its development).

Dubbed a 'mega boom,' the lift provides a horizontal outreach of up to 30.4m and has an unrestricted platform capacity of 300kg. With a maximum working height of 65.8m, the 2100SJ reaches an equivalent of 22 building storeys.

Other manufacturers have been launching big booms of late to compete with the previously mentioned JLG and Genie booms. At Bauma China, in 2018, XCMG launched the 56.6m platform height GTBZ58S telescopic boom. The model has a 450kg restricted basket capacity, and 250kg unrestricted. Maximum outreach is 25.1m, while the weight of the machine is 27,200kg.

More recently, at APEX Asia last year, Sinoboom launched the world's largest articulating boom. At 46.3m platform height, the GTZZ46J just tops JLG's 45.72m platform height 1500AJP. A team of engineers, led by company founder and CEO Steven Liu, developed the GTZZ46J in response to demand from the petrochemical industry, which is the sector that has placed orders for the first units.

It has a horizontal reach of 25.5m and maximum load of 455kg – these being key factors for customers engaged in the installation and maintenance of large steel structures, venues and petrochemical plants, where both span height and horizontal extension are of particular importance, says the company.

Snorkel 2100SJ mega boom



The HT46 RTJ Pro is the first Haulotte to be produced in the US

capacity of 454kg and a working height over 22m.

The electric and diesel engine drive series are developed on the same platform, with 95% of the structural parts and 90% of the components being common, thus reducing the cost of maintenance, parts storage and labour.

Hybrid options

Niftylift was the founder of the hybrid boom range and in recent years has launched its electric E range which offers significantly increased standard duty cycle performance. The latest in the range, which was launched in 2019, is the HR17NE, an all-electric-

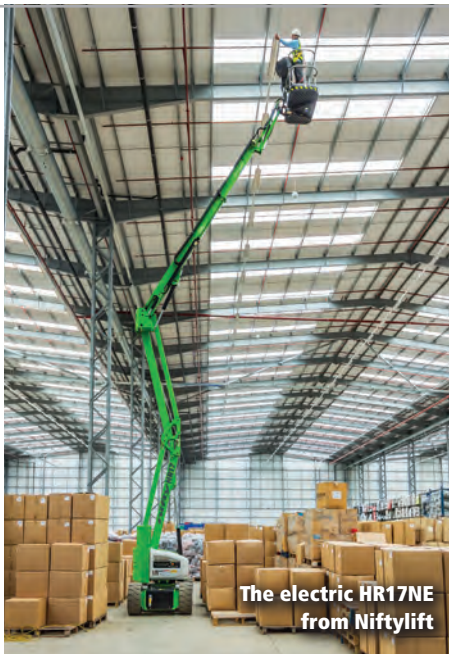
drive version of the HR17N. It offers a 17m working height, with a market-leading outreach of 9.7m, all from a 1.5m wide base that weighs 7,780kg.

Nevertheless, Niftylift is still focusing on hybrid systems with the newly launched second-generation hybrid system, named Gen² Hybrid. The new Gen² Hybrid system is powered by an EU Stage V diesel engine, which is automatically boosted by an electric motor when extra power is needed. This combination enables smaller engines to be used than would otherwise be required, while still maintaining power and performance, said the company.

Genie has chosen the hybrid route with its FE (fuel/electric) range of boom lifts and sees the hybrid option as the relevant choice in the larger rough terrain arena. A recent launch is the Z-45 FE articulated boom, the smaller sibling of the Z-60 FE boom, launched at Bauma 2019. Also launched at the same time was the direct electric drive Genie GS-4655 scissor lift.

The Z-45 FE, like the Z-45/25 DC, can be operated in all-electric mode indoors. However, the FE also comes standard with four-wheel AC direct electric drive and oscillating axles.

Zach Gilmor, Genie Product Manager, Terex AWP, says, in the long term, more powertrains are likely to move towards full electrification, as fully electric >



The electric HR17NE
from Niftylift

aerial products continue to evolve with battery technology and jobsite charging infrastructure. "During this period of transition, Genie has chosen to offer the flexibility of offering both hybrid and full electric powertrains to our customers."

Airo's most recent launch is the hybrid articulated A18 JRTH Plus boom, first presented at the GIS show in Piacenza, Italy, in October 2019.

The A18 JRTH Plus, complements the existing A18 JRTD Plus diesel version, and is designed for increased performance thanks to its lithium iron-phosphate battery pack.

A low power diesel generator recharges the battery, either automatically when the battery is running low or when the operator chooses. Using the on-board charger, the battery can be full in four hours. In the absence of mains power, the generator can be coupled with the model's Supercharger



The hybrid articulated A18 JRTH from Airo

guaranteeing a complete recharging in two hours, when the machine is at a standstill.

From LGMG, and as part of the new booms range coming to the EU market in the third quarter, there will be the A14JE, and due to high demand, a smaller 9m platform height boom will be added later in 2020.

Versatility

Earlier in 2020, LGMG launched the AS1413E, a versatile electric slab scissor with a working height of 16m, suitable for both indoor and outdoor use.

LGMG's electric slab scissors are designed to be rental-friendly with proportional descent, with indoor/outdoor use on many models, including the SS0407E and SS0507E, and available in both hydraulic and electric.

To further strengthen the scissor range, the manufacturer plans to launch its SR0818E across Europe at the end of 2020. There are no plans to launch any hybrid models in 2020. The focus will be on developing electric-powered models as LGMG believes this is the future of the industry. The

company offers lead acid as standard, mainly driven by cost, customer familiarity and availability.

It also offers lithium batteries as an option.

Sinoboom has already released 14m and 16m working height electric articulating boom



LGMG's A14JE

lifts, which are now joined by an 18m electric and hybrid option. The hybrid GTZZ18HEJ and electric GTZZ18EJ were launched in June.

Sinoboom says it expects to launch 18, 20, 24 and 26m pure electric and hybrid telescopic boom lifts too.

ANSI advances

The new US ANSI A92 standards, implemented in June this year, have brought in a new era of dual capacity booms.

Genie kicked the trend off with its Xtra Capacity (XC) units, which have been well documented. To complement the range, the manufacturer launched the second boom lift in its new J range at ConExpo. The J range is lighter and simpler to use than the XC range for operators who want the height rather than the extra capacity and further outreach.

JLG's hi-capacity booms were first announced last year but were on show for the first time this year. JLG's new 600 series hi-capacity HC3 boom models were presented at ConExpo. The series so far consists of the 600AJ and 600S, which each deliver an 18m platform height, and the 660SJ, with a 20m platform height. Each model offers a 300kg unrestricted capacity, plus 340 and 454kg restricted capacities.

Skyjack's extra-capacity/dual zone booms will also be a major part of its future offering. On show at ConExpo was the SJ66T+, with a 300 and 454kg dual capacity. Skyjack's solution to help the North American industry's move into the load sensing requirements of ANSI will replace the whole boom line in the continent.

IRN

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Bright future?

The lull in rental capex due to the pandemic could be especially troubling for lighting tower manufacturers since they supply the rental industry with one of its staple products, but the trend for sustainable equipment could help to sustain demand.

Thomas Allen reports on the latest developments in the sector

As seasonal products, lighting towers commonly feature in rental companies' fleets. So for lighting tower manufacturers like Trime, rental is vitally important. In the UK, which is Trime's main market, close to 90% of its sales go to rental companies, according to CEO Ray Caulfield.

He adds that in the rest of Europe and in the US about 60% of revenues come from rental, while in Australia the split is 50/50.

Caulfield is very familiar with the rental industry; "I've been in the rental industry all my days. For 13 years I was running a company called Errut that was supplying concrete equipment to the rental industry," he says.

Starting afresh

After selling the company to Belle, Caulfield spent 20 years working on exports for Tower Light, before it became part of American company Generac. Soon after, Caulfield left to set up Trime with Andrea Fontanella, who is now Director and General Manager of the firm.

It began with the launch of the X-Eco in 2016 – which is now Trime's largest volume seller – and since then Trime has focused on supplying environmentally friendly products, which Caulfield has seen growing demand for in the industry. "Everything we do has

The X-Eco was Trime's first lighting tower, launched in 2016



Almand's Night-Lite GR-Series is described by the company as a 'work horse on the jobsite'

an environmental benefit," he says.

Compared to the VT1 model that is standard in the UK market, according to Caulfield, the X-Eco offers a 72% reduction in emissions and uses 72% less fuel.

Since then, the company has introduced the X-Hybrid in 2017, which combines a diesel engine with a battery; the X-Solar Hybrid in 2018, which has a diesel engine, a battery and solar panels; and the X-Solar this year, which uses just batteries and solar panels.

Taking Britain as an example, Caulfield says cities are increasingly requiring machines to be electric so that they do not generate emissions on site.

"When it comes to rental," he says, "obviously you have to pay more to rent a solar machine than you would an X-Eco, and sometimes the contractors won't pay that. But they are being forced into that by local authorities." So it appears to be driven by legislation.

He adds that of the



Ray Caulfield, CEO of Trime

approximately 22,000 lighting towers in the UK market, roughly half are still the VT1 type; "So there's still scope for growth in the market because those machines have to be changed..."

So that's good potential for ourselves and other manufacturers of lighting towers."

On the topic of the Covid-19 pandemic, Caulfield says the UK experiences a recession roughly every 10 years, so he and his team have experience of dealing with such situations where rental companies stop buying new equipment for a time.

"What you would usually do in a recession is start to look for more markets overseas that are not affected... But of course this particular recession is worldwide," says Caulfield.

Further afield

So, while Trime is still employing the strategy of looking overseas – indeed, the US market is proving a good one for Trime – Caulfield says, "We are looking at new products, new market sectors – not necessarily lighting towers." Though, he could not be more specific.

Caulfield also stressed the importance of small rental companies; "The one-man, one-depot businesses are very important to us, so we've got a good spread of network to the smaller rental companies."

Estimating that there are about 2,000 such companies in the UK, Caulfield says Trime is building up this side of the business.

Sunbelt Rentals in the UK – which was A-Plant until its rebranding by parent company Ashtead at the start of May – added £400,000 worth of new solar lighting towers from Prolectric to its rental fleet earlier this year.

They were purchased by the company's rail >

“There's still scope for growth in the market... That's good potential for ourselves and other manufacturers.”

RAY CAULFIELD, CEO, Trime



High lights

Peruvian mining company JRC recently purchased six HiLight V5+ lighting towers from Atlas Copco to illuminate the Iscaycruz mine in Peru, which is located at an altitude of between 4,700 and 5,000m.

Julio Tello, JRC Equipment Manager, said, "The survival in this area is very hard, both for people and equipment: we worked with light towers from another manufacturer for a while and they did not work out. The three-cylinder engines shut down after two hours working and the lamps broke easily."

This resulted in heavy losses for JRC due to the impact on night shifts. As a result, the company tested one of Atlas Copco's HiLight V5+ lighting towers on site and subsequently bought six units.

The HiLight V5+ model has been designed for demanding conditions, according to Atlas Copco. It features a HardHat canopy as standard, which protects internal parts, and it has directional optic lenses that maximise practical light coverage while minimising dark spots.

Each lighting tower has four LED floodlights, each projecting 350W of light. As a result, the HiLight H5+ can illuminate an area of up to 5,000m², providing an average brightness of 20 lux.

The lux levels of the LED lamps do not deterioration and the lamps themselves have a life expectancy of more than 50,000 hours, said Atlas Copco.

In addition, the HiLight H5+ lighting tower consumes less than 0.5 litres of fuel per hour, providing a run time between refuelling of 260 hours.

"The acquisition of Atlas Copco's HiLight V5+ light towers with two-cylinder engines changed the whole picture for us," says Tello. "It's a solution that has been radical. Until now, JRC's expertise has been mainly underground mining projects. However, the operations at Iscaycruz is showing that we are the right fit for open-pit operations. That is why we are preparing seven mining projects in Peru and one in Mexico. The HiLight V5+ light towers are helping us to operate this type of project perfectly".

Nelson Batistucci, Atlas Copco Business Line Manager for the Andean region, said, "In order to deliver the right solution for our customers, we need to understand their needs well. In this case, considering the challenges of working at extreme altitude, as it is common for many of our mining customers in Peru, helped us choose the right light tower for JRC."

Six of Atlas Copco's HiLight V5+ lighting towers are being used in Peru's Iscaycruz mine



Lind Equipment's All-In-One Beacon LED Towers in use on a construction site

MHM's ST-9 is powered by a lithium-iron-phosphate battery charged by a solar panel

business in support of Network Rail's CP6 target to reduce non-traction energy consumption by almost 20% and carbon emissions by 25%.

Paul Price, Director of Rail at Sunbelt Rentals, said, "We've made an initial investment of 25 units, with plans to purchase further stock later this year. We anticipate that these solar lighting towers will be a prominent offering in our fleet soon."

The ProLight does not require fuel and its digital inbuilt remote-control function allows operators to alter the settings remotely, storing key data that can be monitored or evaluated over time.

It has a trailer-mounted unit with heavy-duty, deep-cycle batteries, an array of three or four 330W solar panels, a 7.5m telescopic mast and four LED lights that can cover a 550m² area at a minimum lux level of 20 and 10,000 to 40,000 lumens output.

The lighting towers will be used on rail renewal sites including access roads, welfare cabin areas, car parks and track working areas.

Price said, "There's no doubt these new technologies are going to be a complete game changer for our industry and we need to push on to get to a place where using this type of technology is just the norm."

"The environmental impact of running diesel tower lights all night on large-scale sites is no longer sustainable."

He added that, beyond the issue of carbon emissions, it is important to reduce air and noise pollution for lineside neighbours.

"The demand for sustainable, lower carbon producing tower lighting has increased in recent years," said Price, "And Sunbelt are delighted to offer the biggest fleet in the country."

MHM Plant, based in the UK, has recently launched three new lighting towers, all built in Italy.

The company says sustainability and the use of renewables are at the top of its agenda. As a result, two of the new products are solar powered.

The X-Street model has an integrated lithium-iron-phosphate battery that is charged by the unit's solar panels, which operate in most weather conditions. The benefits of this setup extend beyond the lack of carbon emissions to the fact that the machine is silent.



The lighting tower has a 50W LED lamp fitted onto a five-section manual vertical tower, and it is fitted with an automatic movement sensor that dims the light when it detects no movement and increases the light intensity when motion reappears.

MHM said 40 units can be loaded on a standard truck.

Solar charging

The other new diesel-free lighting tower from MHM is the ST-9, which is also powered by a lithium-iron-phosphate battery charged by a solar panel.

Rental companies have the option to upgrade to a vandal- and shatter-proof, flexible solar panel for added safety.

The ST-9, which is fitted onto a road tow trailer, has a 9m vertical mast with four LED lamps.

For rental companies that are still opting for diesel-powered lighting towers, MHM has developed the new DT-9 model, which is also fitted to a road tow trailer.

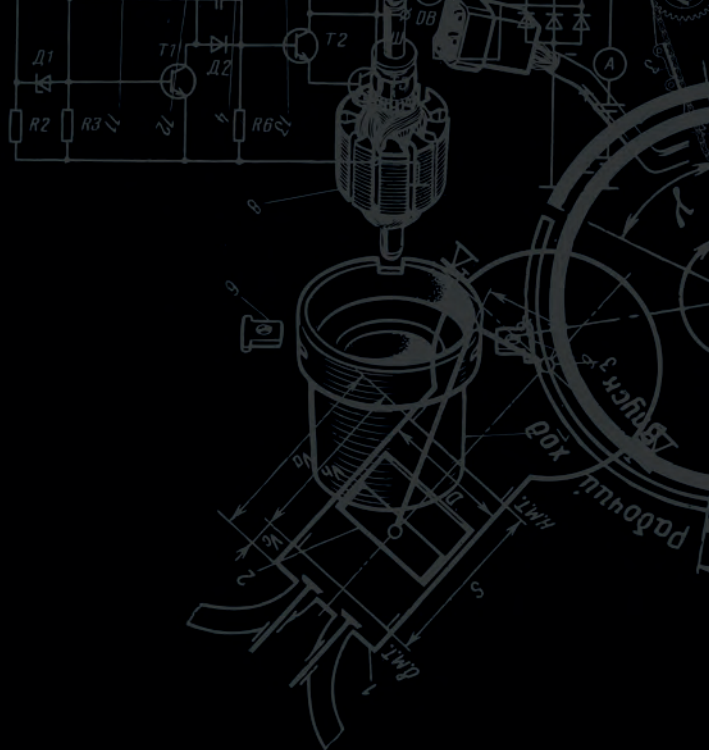
The unit has a 9m hydraulically operated vertical mast and four lamp heads each with eight LED lamps. The eight lamps have been designed to swivel in different directions to provide a greater, more even spread of light, according to MHM.

For ease of maintenance, the DT-9 has large gull-wing doors and a 'king-sized' fuel tank for extended running times.

MHM Group has changed significantly in recent >

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Trime's 'Monster' lighting tower

Italian manufacturer Trime has introduced a new lighting tower aimed at the mining industry.

The globally available Trime X-Mine Monster is a lighting tower fixed onto a wide crawler undercarriage, giving it stability in all terrains.

The unit has a dynamic levelling system that automatically tilts the mast when on an incline, so that the tower remains vertical and the lamps steady.

Thirty multi-directional and adjustable 150W energy-saving LED lamps are fitted onto a 10m hydraulic and foldable mast, with 240° rotation. As a result, the X-Mine Monster can illuminate an area of up to 24,500m².

The new lighting tower was said to be easy to operate and simple to manoeuvre.

Remotely controlled via a Wi-Fi enabled joystick-operated console, it has a maximum driving speed of 2.2km/h.

Ground level headlamps are fitted for safety, and the unit has a 150 litre fuel tank that allows it to run continuously for up 94 hours. 9kVA of auxiliary power is also available at 48V DC.

Trime designed and manufactured the X-Mine Monster in response to a request from an Australian open cast mining contractor that was working twenty-four hours a day.

The contractor found that traditional wheeled lighting towers were unsteady and provided insufficient lighting. They were also proving difficult to transport around the site.

So the X-Mine Monster was made to provide lighting in areas that are difficult to access with traditional vertical lighting towers, and to light up a work area above and below an excavator's digging arm.

"We always have a very open mind when we receive special requests for bespoke machinery," said Matteo Tagliani, Sales Director, Trime. "We will always listen carefully to individual requests and work hard to achieve a satisfactory outcome for both parties."



**Trime's new
X-Mine Monster
lighting tower**

Equipment's All-In-One Beacon LED Tower recently won the Experts Choice Most Innovative Product Award at the World of Concrete exhibition.

The All-In-One Beacon LED Tower alleviates the need to own three separate lighting assets by combining them all into a single, compact unit.

The All-In-One has the capacity to be generator-powered, electric-powered and to work as a diffused no-glare lighting tower.

This of course means that the unit can be rented out for a range of applications, which has obvious benefits for equipment utilisation. Instead of owning a generator lighting tower, a small indoor electric tower and a balloon light, a rental company can own a single unit to serve all those needs, throughout the year.

It was described by Lind Equipment as a heavy-duty, full-brightness lighting tower than can also be a diffused, no-glare lighting tower. In fact, the unit's adjustable, movable no-glare diffuser frames make it possible to deliver a mixture of diffused and full-brightness light simultaneously.

Sean Vandoorsele, CEO of Lind Equipment, said, "The Beacon LED Tower series has received an astonishing seven award wins in a few short years – and we are just getting started." **IRN**



**The All-In-One
Beacon LED
Tower can deliver a
mixture of
diffused and full-brightness
light simultaneously**

times, with the group being divided into three divisions: MHM New Equipment Sales, MHM Used Equipment Sales and MHM Rehire Division.

Mat Llewellyn, the group's Managing Director, says, "Our aim in creating these divisions is to give each of our services a clear identity, so that any rental company wishing to purchase or rehire our equipment can swiftly determine which option is relevant to them."

The MHM Rehire division only hires to recognised rental firms, rather than end users.

A new lighting tower introduced by Allmand was described by the US-based company as a compact 'work horse on the jobsite'.

The Night-Lite GR-Series is powered by an air-cooled Yanmar diesel engine that was said to be lightweight and low maintenance. It can handle temperatures as low as -21°C or as high as 40°C.

The lighting tower also features a 170 litre fuel tank and four LED fixtures with 195,592 total lumens.

Cost of ownership

20 units can be shipped on a 48-foot truck, and Allmand claims that each tower offers a 12% increase in total cost of ownership compared to the leading competitor based on five years of service and industry residual value.

Over the border in Canada, manufacturer Lind

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Event details

WHAT: International Rental Conference (IRC)

WHEN: 23 November, 2020

WHERE: Jumeirah Himalayas Hotel, Shanghai

www.khl-irc.com

**Chinese access
manufacturer LGMG
will provide IRC
delegates with an
update on the Chinese
access market**

IRC goes ahead

The eighth International Rental Conference (IRC) will take place in Shanghai the day before Bauma China, but with a slightly different focus

This year's IRC conference will likely be an all-China affair as Covid-19 creates travel complications for international visitors. Taking place at the Jumeirah Himalayas Hotel, opposite the Bauma China showground, there will be the usual mix of Chinese and international speakers, but this year the latter will be present by video only.

Speakers will include the following, with some representatives still to be confirmed:

- **Peter Douglas**, CEO, IPAF (by video)
- **Chai Zhao Yi**, Executive director & Founder, Shanghai Pangyuan
- **Zhi Kai Yin**, General Manager, LGMG
- **Xu Hong Xia**, General Manager, Sinoboom
- **Tom Lu**, General Manager, Kanamoto China
- **Liugong**
- **Hebei Tianyuan Equipment Rental Co.**

As well as insights into the still growing aerial platform sector from manufacturers Sinoboom and LGMG, Chinese manufacturer Liugong will present for the first time since it announced its new rental strategy, which included the acquisition of the Hertz Rental business in China.

Although aerial platform rental has been to the fore in recent years – with Chinese access rental companies

routinely doubling in size every year – this year the conference will give special emphasis to the development of earthmoving rentals in the country.

Kanamoto China – the Chinese subsidiary of Japan's Kanamoto – will discuss how it sees the rental market developing in the country, and Komatsu dealer Hebei Tianyuan – which operates a fleet of more than 600 excavators – will provide practical experience of running an earthmoving equipment rental business, which in its case includes the extensive use of GPS tracking equipment. Tianyuan specialises in excavators larger than 20 tonnes and is believed to be the largest renter of excavators in the country.

Tower cranes

Delegates will also benefit from hearing from Chai Zhao Yi, Executive Director and founder of Shanghai Pangyuan, which is China's largest tower crane rental company with a fleet of more than 7,000 cranes. In fact, that makes it the largest tower crane rental company in the world, as revealed by the tower crane fleet 'toplist' published recently by our sister magazine *International Cranes and Specialized Transport*.

Shanghai Pangyuan rents cranes across China and is uniquely placed to provide insights into construction and industrial activity around the country.

However, with aials still growing rapidly, there will be much interest in what Sinoboom and LGMG report on the market. Equally so for Peter Douglas, CEO of IPAF, who will draw on his extensive experience of running access rental businesses in the UK to explain how companies can maintain standards

IPAF CEO Peter Douglas will speak at IRC through video

**INTERNATIONAL
rental
CONFERENCE** **ASIA**
23 November 2020 Shanghai, China



of health and safety while growing rapidly: a hot topic in China's current market.

It will be a different IRC but it will give a deeper focus on what is happening in China's rental market. **IRN**

Chai Zhao Yi, Executive Director and founder of Shanghai Pangyuan will present at IRC

Chinese stimulus

The impact of the Covid-19 pandemic will see most equipment markets fall by 15-35% this year according to Off-Highway Research. The global picture would much worse were it not for a significant stimulus drive in China.

The Covid-19 pandemic will see sales of construction equipment fall in almost every country of the world this year. However, stimulus spending in China will lift the market by an expected 14% to take sales to their highest since the previous stimulus boom in 2010-2011. Prior to the Covid-19 outbreak, sales in China were expected to fall in 2020 as the market passed its cyclical peak.

Off-Highway Research managing director Chris Sleight said, "The Chinese market has seen remarkable growth since April and this will certainly cushion the blow."





The 2018 edition of Bauma China attracted 212,500 visitors. How will this year compare?

Moving forward

Messe München proceeds with its big show in China, as the Chinese government stimulates the economy

It has been confirmed that the 10th Bauma China construction equipment trade show will be going ahead as planned, from 24-27 November, 2020, at the Shanghai New International Expo Centre (SNIEC), in Shanghai, China.

Whether the show will attract the same number of visitors as in previous years – 212,500 people attended the event in 2018, mostly from Asia – is questionable, but the organisers, Messe München, are still expecting in excess of 3,000 exhibitors.

Recovering economy

Messe München said China's economy appears to be recovering from the Covid-19 shutdowns. Thanks to a series of economic stimulus packages unveiled by the Chinese government, investment in infrastructure is expected to increase by 10% this year, with China's construction machinery market forecast to grow by a similar amount, according to the Shanghai Securities Co.

Messe München said it will be following health and safety guidelines published by Shanghai Municipal Commission of Commerce and Shanghai Convention & Exhibition Industries Association to safeguard everyone at the show. As a result, the venue will be thoroughly cleaned, on-site medical services

will be provided, and all event registrations will be conducted online.

The exhibition will be spread across a 300,000m² area, 100,000m² of which is outdoors. So far, it has been confirmed that there will be country pavilions for Germany, Italy, Spain, the UK, Turkey and South Korea, as well as a European pavilion.

IRN

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

Limited impact

XCMG moved to a new factory at the end of 2019 and so, according to the company's General Manager Li Qian Jin, it has not been impacted much by the Covid-19 pandemic because it has been busy setting up the new facilities.

Located on a 220,000m² site, the new factory has a capacity to produce 15,000 scissor lifts and 4,800 boom lifts per year.

In 2019, the company recorded total revenues of RMB1.25 billion, and this year it is expecting to generate RMB2.5 billion. In the first half of 2020, XCMG sold 1,600 booms and 4,000 scissors.

Meanwhile, Chinese manufacturer LGMG is forecasting sales of 25,000 units of access equipment this year, which might be lower than the company's original 2020 forecast of 30,000 but is still a significant increase on the 2019 figure of 18,000 units.

LGMG said its sales did take a hit in the first quarter of 2020 but then picked up again in the second quarter. In total, the company sold 9,180 units in the first half of 2020, which is on a par with the first half of 2019.

Overseas sales were originally expected to grow to 8,000 units in 2020, but now they are forecast to be 4,000 – again, because of the pandemic.

The US-China trade war has also had some impact on LGMG. With tariffs increased from 10 to 25%, LGMG has absorbed some of the extra costs but has also had to increase prices.

90% of LGMG's sales go to rental. Its four key clients are Horizon, Xinxiang, Huatie and Zhongneng, of which Horizon is the biggest. LGMG recently signed a cooperation agreement with Horizon and supplied them with 3,000 units in July and 4,000 in August, 2020.

Horizon has 84 depots in China, and the company is planning to grow its network to 140 by the end of 2020.

LGMG's General Manager Zhi Kai Yin also stressed the importance of smaller rental companies, though, and said the firm is offering them support through financing packages.

Currently, LGMG's highest boom is 32m, but the manufacturer is planning to launch a 38m boom soon and hopes to develop a 40m boom. Also, LGMG started producing truck mounted access equipment this year.

Figures: 2018 show



3,350 exhibitors from **38** countries and regions



212,500 visitors
94% attended from Asia



330,000m² of exhibition space:
230,000m² indoors,
100,000m² outdoors

Messe München is expecting 3,000 exhibitors this year



Turbulent times

Some of HCMJ's latest models are equipped with the company's Object Detection and Movement Restriction System



Japan has been afflicted by several human and natural disasters in recent years, but the resulting restoration work is helping to buoy demand for rental equipment during the Covid-19 crisis. Thomas Allen reports

Japan has been beset by a series of human and natural disasters in recent years, such as the Fukushima nuclear plant explosion and the Tohoku earthquake and tsunami of 2011. Just as the country was recovering, the Covid-19 pandemic hit.

However, rental is helping to bolster the country's resilience.

Naohito Konuma, President and COO of Japanese rental firm Aktio Corporation, says, "The rental industry in Japan has seen growing opportunities to contribute to restoration and reconstruction work through cooperation with local governments."

He adds, "Furthermore, the recent trend of corporate management shifts from the ownership of fixed assets to rental matches perfectly with the rental industry."

The Covid-19 pandemic has had a negative impact on Aktio's revenues though, with construction sites in urban areas suspended, according to Konuma.

He says the biggest impact has been seen in Aktio's events division. Although he does not disclose figures, he says, "Almost all events have been cancelled or postponed since March. As a result, the sales have not achieved the sales plan for about six months." Perhaps most significant is the postponement of the 2020 Tokyo Olympic Games to next year.

On the positive side, though, Aktio has seen new types of demand resulting from the pandemic. For



Naohito Konuma, President and COO of Aktio Corporation

instance, the company developed a temporary negative pressure unit. The portable cabin has a ventilation system with a built-in anti-virus HEPA (high-efficiency particulate air) filter to keep the air within the unit clean. The space can be used to examine workers, and it can be fitted with sinks and showers.

Skills shortage

When asked about trends in the Japanese rental market, Konuma says, "The shortage of manpower in the construction and civil engineering industries is a major long-term issue," citing the country's low birth rate and the decreasing number of skilled workers.

This has fuelled demand for machinery that is equipped with digital technologies such as telematics. He suggests the Covid-19 pandemic could have the effect of further driving demand for such digitally-enhanced machines because of the greater need for automation and remote operations to comply with social distancing requirements.

"Safety features such as automatic stop devices and alarms are always required," he adds.

The trend towards digitalisation is proving beneficial for the rental sector in Japan, according to Kazuo Enomoto, President of Hitachi Construction Machinery Japan (HCMJ); "We see increasing rental penetration in Japan due to the higher purchase price of new machines, for example because of ICT features. Provided that domestic construction spending remains stable, we expect that the amount spent in the rental sector is going to increase."

While digital technologies are frequently chosen for private projects to boost efficiency, they are often a requirement for public works in Japan, says Enomoto.

Some of HCMJ's latest models are equipped with the company's Object Detection and Movement Restriction System; "The system improves safety and efficiency of construction sites," says Enomoto.

HCMJ's equipment sales in Japan are evenly split between end users



Kazuo Enomoto, President of HCMJ





Sangmin Kim, Head of Doosan Bobcat's Japan Regional Office

and rental companies, according to Enomoto. "Within the rental industry, the proportion that goes to our own rental division and that which goes to independent rental companies is also almost the same," he adds.

Commenting on the impacts of the pandemic, Enomoto says, "Due to the delay or cancellation of construction projects, the construction period is concentrated."

He adds, "The downturn in the real estate market and of the automobile industry, as well as the limited entry of commercial vessels, has had a negative impact on the steel industry."

With regard to the effects on HCMJ's sales operations, Enomoto says, "Sales activity is limited due to constraints on physical visits to customers. Instead, we use alternative means to communicate with customers, such as phone calls, e-mails and SNS. We continue to provide value to customers by using web technology and developing new sales tools while minimising physical visits."

Recovering demand

Japanese rental company Kanamoto says the pandemic caused a temporary decline in demand for rented equipment due to the suspension of construction work, but it is now recovering.

The company has implemented special measures to safeguard the wellbeing of its employees and customers. For example, Kanamoto says, "We converted a large conference into a virtual conference, and we are implementing staggered working hours and teleworking."

Delivery drivers are required to follow special procedures, such as wearing face masks, and when rented equipment is returned to depots, high-touch areas such as handles and buttons are disinfected.

Kanamoto has also seen an increase in orders placed online and by telephone.

Although restoration and mitigation work following the various natural disasters in Japan is helping to sustain strong demand for rented equipment, Kanamoto expects private construction investment to take a hit from the pandemic in the longer-term.

The trend towards digitalisation is also highlighted by Kanamoto. The company says it is collaborating with manufacturers and contractors to develop new IT systems and safety features on machines.

One example is Kanamoto's contact prevention system, 'Nakusidento', which is an object recognition function installed on construction equipment.

Another example is the development of a humanoid robot called 'KanaRobo', which can be used to operate construction machines remotely.

Kanamoto also highlighted the fact that the industry is gradually becoming oligopolistic, which



Doosan Bobcat's tracked loaders with 3D grader attachments have proven popular in Japan

Taking a hit

Kanamoto has taken a hit from the Covid-19 pandemic, with net sales down 5% to JPY91.4 billion and operating profit down 18% to JPY9.2 billion for the six months ending 30 April, 2020, compared to the equivalent period last year.

The Japanese economy was said to have been gradually recovering before Covid-19 emerged, causing construction projects to be suspended or postponed.

"In the construction industry related to the Kanamoto Group," the company said, "public investment remained firm, focused on disaster prevention and mitigation-related works in response to recent devastating natural disasters, and on maintenance and renewal of Japan's aging social infrastructure."

It was added that private construction investment has also been relatively robust.

Against this backdrop, Kanamoto has been proceeding with its 'Creative 60' medium-term management plan. It aims to expand its domestic operations, develop its overseas business and optimise its internal operations.

Despite the impact of the pandemic on construction projects, Kanamoto's Construction Equipment Rental Division – its primary business – was buoyed up by infrastructure projects, disaster prevention and mitigation works, energy-related jobs and redevelopment schemes.

means that it is being dominated by an increasingly smaller number of players.

This was echoed by Sangmin Kim, Head of manufacturer Doosan Bobcat's Japan Regional Office; "Rental companies have become larger through mergers and this is still happening but not as much as before."

He adds, "Some of the rental companies are still trying to grow through the merger of strong local rental businesses, whilst others are trying to differentiate from others with the introduction of new features such as ICT."

About 10% of Doosan Bobcat's unit sales in Japan go to the rental sector, which equates to approximately 30% of sales revenues, according to Kim.

He says construction equipment such as excavators, cranes and loaders are

popular in Japan, but since they are expensive people prefer to rent rather than buy them.

One particular type of equipment highlighted by Kim is Doosan Bobcat's compact tracked loaders with 3D grader attachments, which the company has been supplying to one of Japan's largest rental companies for several years.

"Previously there weren't many compact machines for grading in Japan, especially with ICT," says Kim. "So we introduced our compact track loaders with 3D graders, and as they are quite differentiated from other products, we have sold a lot."

He adds that this particular rental company has been good at introducing these new machines and attachments to customers in Japan, and so they have not only been renting them but also selling them.

Second wave?

The pandemic has not had much of an impact on the demand for Doosan Bobcat's products in Japan, according to Kim – perhaps helped by the fact that the company has been offering various promotions to help its dealers sell more – but he says, "The market seems to be shrinking due to a 2nd wave of Covid-19."

Seigo Minamioka, President and CEO of Japanese rental firm Nikken Corporation, says that, prior to the Covid-19 pandemic, the rental market in Japan was expected to continue growing steadily, but this is now under review. Nikken has seen an overall drop in demand for rental equipment.

"For the time being, investment in the private sector is restrained," he says, "and the demand for rental has decreased substantially. But once Covid-19 is over, the market is expected to gradually come back."

In the public sector, on the other hand, he says, "There is a big demand for restoration and disaster mitigation following the recent great national disasters, and rental demand is stable here."

When asked what has been learned from the pandemic, Minamioka says, "It is necessary to always

assume that unexpected situations may occur in the future. And we need to prepare for such unexpected situations by reviewing the business portfolio."

He adds that, with the sudden shift to remote working, businesses in general have been made aware of the need to accelerate digitalisation.

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Seigo Minamioka, President and CEO of Nikken Corporation



Nikken's Ashikaga depot



Cristián Peters, **Editor of**
Construcción Latinoamericana,
looks at Latin America's
biggest rental players

Moving up

RANK 20 19	COMPANY	REVENUES 2019 (\$ MILLION)	HEAD OFFICE	AREAS OF OPERATION
1 NEW	Grupo Vamos	235.5	Brasil	Brasil, Uruguay, Argentina, Chile
2 1	Aggreko	217.2	United Kingdom	Argentina, Brasil, Chile, Colombia, Mexico, Peru, Panama, Venezuela, Belize, El Salvador, Nicaragua, Costa Rica, Honduras
3 4	Ameco	121.0	United States	Chile, Peru, Mexico, Colombia
4 3	Madisa CAT	116.0	Mexico	Mexico
5 13	Sullair Argentina	115.0	Argentina	Argentina
6 8	Ferreyros	111.9	Peru	Peru
7 7	SK Rental Group	108.0	Chile	Chile, Peru, Brasil, Colombia, Bolivia
8 5	APR Energy*	105.0	United States	Argentina, Brasil, Costa Rica, Ecuador, Haiti, Guatemala, Martinica, Panama, Peru, Uruguay
9 6	SoEnergy*	100.0	United States	Costa Rica, El Salvador, Colombia, Brasil, Argentina
10 2	Ouro Verde Locação (heavy equipment)	96.1	Brasil	Brasil
11 9	Mills Estruturas e Serviços de Engenharia	85.4	Brasil	Brasil
12 10	Locar Guindastes e Transportes Intermodais Ltda	59.3	Brasil	Brasil
13 NEW	Casa do Construtor	54.1	Brasil	Brasil, Paraguay
14 15	Loxam*	50.0	France	Brasil, Colombia
15 14	FINSA	48.7	Chile	Argentina, Bolivia, Chile
16 16	Makro Engenharia*	42.0	Brasil	Brasil
17 17	Escad*	40.5	Brasil	Brasil
18 18	Grupo Baeza	37.0	Puerto Rico	Puerto Rico, Panama, Costa Rica, Miami
19 NEW	Tecno Fast	32.0	Chile	Chile, Colombia, Peru
20 11	Sotreq	31.4	Brasil	Brasil
21 20	Grupo Orguel*	30.0	Brasil	Brasil
22 21	Komatsu Cummins Chile Arrienda*	26.7	Chile	Chile
23 NEW	Pesa	26.3	Brasil	Brasil
=2424	GAM Alquiler	26.1	Spain	Chile, Colombia, Mexico, Panama, Peru, Dominican Republic
=2419	A Geradora	26.1	Brasil	Brasil
26 25	Trek Rental	24.5	Chile	Chile
27 27	Tecmaco Integral	24.4	Argentina	Argentina
28 23	Algeco Scotsman*	21.3	United States	Brasil, Mexico
29 22	Lafaete Locação de Equipamentos*	21.0	Brasil	Brasil, Uruguay
30 30	Corporación General de Tractores*	16.7	Guatemala	Guatemala
31 28	Komatsu Maquinarias México*	16.0	Mexico	Mexico
32 29	Rentandes	15.5	Colombia	Colombia
33 32	CGM Rental*	13.0	Peru	Peru
34 33	Transportes y grúas Auriga*	12.1	Mexico	Mexico, Central America
35 35	Megarent*	11.5	Mexico	Mexico
36 34	Locabens	11.2	Brasil	Brasil
37 37	Brasif Rental*	9.1	Brasil	Brasil
38 38	Bell Engenharia*	8.9	Brasil	Brasil
39 40	Guindastec*	7.1	Brasil	Brasil
40 41	RD Rental*	6.8	Peru	Peru
41 39	Irga Lupercio Torres*	6.4	Brasil	Brasil
42 NEW	Rentsol	6.2	Colombia	Colombia
43 43	IIASA Panamá*	5.7	Panama	Panama
=4442	Estaf Equipamentos*	5.5	Brasil	Brasil
=4445	García Vega*	5.5	Colombia	Colombia, Bolivia

This year's LatAm Rental 45 ranking of Latin America's largest rental companies shows some positive developments, ahead of what is turning out to be a challenging year for the industry due to the Covid-19 pandemic.

The 45 largest rental companies in the region achieved total revenues of almost US\$2.2 billion

TYPE OF RENTAL COMPANY

Construction equipment, trucks
Energy generation, temperature control

Construction equipment, tools, power, portable accommodation
Construction equipment, tools, events, mining
Construction equipment, tools, industrial, mining
Construction equipment, tools, events
Construction equipment
Power

Power
Construction equipment, tools, other
Construction equipment

Construction equipment, cranes

Construction equipment, tools
Construction equipment

Construction equipment
Construction equipment
Earthmoving equipment

Construction equipment, tools
Portable accommodation
Construction equipment, industrial, medical, mining, power

Construction equipment, tools, power, access
Construction equipment, power, access
Construction equipment
Construction equipment
Construction equipment, power, lighting, events
Construction equipment
Construction equipment
Portable accommodation

Construction equipment, tools, portable accommodation, access
Construction equipment, tools, power, access, lighting, portable accommodation
Construction equipment, cranes, telehandlers
Construction equipment
Construction equipment, tools, power, access
Construction equipment, tools, power, access
Construction equipment, tools
Construction equipment, cranes, lifts
Construction equipment, tools, access
Construction equipment
Construction equipment
Construction equipment, tools, power, access
Cranes
Construction equipment, events
Construction equipment
Access, power, scaffolding
Construction equipment

during 2019, a slight increase on the \$2.15 billion reported in last year's ranking.

The main novelty in this year's league table is a new entrant at the top: Vamos Group, the division of Brazilian logistics company JSL that is responsible for the distribution and rental of construction equipment and trucks. With 2019 revenues of \$235.5 million, it is the largest rental company in the region, superseding Aggreko, which had previously been in lead position.

Aggreko is now in second place, with a turnover of \$217 million last year.

In third place, generating \$121 million in the region, is Ameco, closely followed by Mexico-based Madisa with 2019 revenues of \$116 million.

Hot on Madisa's heels is Sullair Argentina, which has risen eight ranks to fifth position in the table after making a turnover of \$115 million last year.

Also rising in the ranks – by two positions – is Peru-based Ferreyros, one of the oldest Caterpillar dealers in the world. In 2019, the company recorded revenues of \$111.9 million, representing a 30% increase on the firm's 2018 revenue figures.

Chile-based SK Rental Group, which has operations in Bolivia, Brazil, Chile, Colombia and Peru, maintained its position in seventh place with 2019 revenues of \$108 million.

Meanwhile, a drop of three places was suffered by generator rental specialist APR Energy, which achieved revenues of approximately \$105 million in Latin America, putting the company in eighth position, closely followed by another American generator specialist, SoEnergy, in ninth place, with estimated 2019 revenues of \$100 million.

Rounding off the top ten is another large Brazilian company, Ouro Verde Locação, which achieved revenues of \$96.1 million through its heavy equipment division.

Investment

The capital expenditure recorded by the companies in this year's LatAm Rental 45 amounts to \$667.9 million, which is almost 30% of total revenues. This demonstrates the positive expectations rental firms in the region had for this fiscal year – expectations that are now unlikely to be met due to the pandemic. It will be interesting to see in next year's ranking how the crisis impacts capital expenditure.

The greatest investment in 2019 was made by Sullair Argentina, which channelled more than \$250 million into its fleet last year. This far exceeds



LatAm 45 Rental

The LatAm Rental 45 is sister magazine Construcción Latinoamericana's (CLA) annual ranking of the largest rental companies in Latin America.

The full report can be found in CLA's September issue.



the capex of the next biggest spender, Ouro Verde Locação, which invested \$78.6 million in 2019.

Looking at the 2019 capex figures, it is important to highlight that five of the top 10 companies that disclosed their spending are Caterpillar dealers: FINSA (Argentina, Bolivia, Chile), Madisa (Mexico), Ferreyros (Peru), Sotreq and Pesa (Brazil), which together invested \$156.2 million in new equipment, representing 23.4% of total investments by the LatAm Rental 45 companies.

New additions

Aside from JSL's entry into the league table, there are three other new companies in this year's ranking. Casa do Construtor, which is also Brazilian, generated revenues in excess of \$54.1 million, putting it in 13th position. Another new Brazilian firm in the table is Pesa, which ranks 23rd with 2019 revenues of \$26.3 million. Finally, Colombia-based Rentsol has just made it into the ranking in 42nd position, with revenues of \$6.2 million last year.

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Top 10 Investors

Rank	Company	Capital expenditure US\$ million	% of total %	% of top 10 %
1	Sullair Argentina	250.0	37.5	40.7
2	Ouro Verde Locação (heavy equipment)	78.6	11.8	12.8
3	Madisa CAT	70.0	10.5	11.4
4	Ameco	60.0	9.0	9.8
5	SK Rental Group	47.0	7.0	7.6
6	Ferreyros	34.0	5.1	5.5
7	Tecno Fast	23.0	3.4	3.7
8	FINSA	20.6	3.1	3.4
9	Sotreq	17.0	2.5	2.8
10	Pesa	14.6	2.2	2.4
	Top 10	614.8	92.2	
	Total	666.8		

The road ahead

With roadwork activity little impacted at the peak of the pandemic, Thomas Allen asks about the longer-term effects and looks at the new equipment that will be building the roads of the future

Due to the huge economic impact of the Covid-19 pandemic, governments around the world will likely be looking to stimulate their economies by investing in infrastructure, including roads.

This gives Alexander Greschner, Chief Sales Officer of compact equipment manufacturer Wacker Neuson, some reason to be optimistic about the future; "Roads themselves are something you cannot stop investing in; you have to rebuild, you have to maintain, you have to keep them in shape."

Looking ahead, Greschner says, "In the central and northern European countries, I think there is maybe a bit of a delay, but we know from many customer discussions in the past weeks that the pipeline for roadbuilding is not looking too bad." This is because road projects are often planned far in advance.

However, there is regional variation; "We still see that the southern European countries – being Spain and Italy – are a little bit slower with their initiatives," says Greschner, adding that Spain has done a lot of roadbuilding over the last decade, meaning its road networks are of a high standard.

Italy, he says, remains dependent upon European support because the local government is lacking financial leverage; "And this partly reflects the situation in central eastern Europe where a lot of the countries there are still somehow dependent on supportive funding from Europe," says Greschner.

China going strong

Meanwhile, outside of Europe, China is going strong, he says; "It was like turning a switch off and then on again; with immediate effect, China was back on stage and projects were resumed. There we think the government will do everything to catch up because they have their

Alexander Greschner, CSO, Wacker Neuson

Wacker Neuson's Dual View dumper was said to have made an impact in the German market



A Case TR270 compact tracked loader with a Case T450 Rock Wheel attachment, being used on the Isle of Man

A lot of Wacker Neuson's equipment is used in roadwork projects, but the company's portfolio was recently made even more relevant to roadworks by the addition of the Dual View Dumper. It was introduced last year and won the Rental Product of the Year category in this year's European Rental Awards.

Power to pivot

Thanks to its rotating operator platform, Greschner says, "On a single-lane jobsite, it allows the operator to drive in forwards, load or unload the bucket, spin the seat around and drive out the same way, removing the need to manoeuvre."

He adds, "We experienced in the last 12 months

five-year plan, with or without Corona."

Speaking about South America, though, Greschner says, "That's probably one of the most difficult situations around the globe right now because there we already had the political issues at the end of last year, followed now by Covid. Obviously, the economic situation there is rather dramatic. So markets like Brazil, Peru and Chile have big question marks right now."

Meanwhile, Greschner is not expecting there to be a strong focus on roads in North America where, he says, "there is a lot of stimulation from the government, but it goes more into the consumer side still".



in Germany a big impact with this product – and Germany has been a non-dumper market for the last 50 years.”

Greschner also notes the growing trend, globally, for roadworks to be carried out during the night; “The roads get locked down in the evening and reopen in the morning, to avoid the main traffic and have an easier environment with fewer people around.”

This requires quiet operation, which feeds into the growing demand for electric equipment.

Wacker Neuson is a strong proponent of electrification and, as such, is steadily broadening its range of electric equipment. Although the shift in the market towards these types of machines is largely driven by legislation, Greschner emphasises that “to have a sustainable success, it has to be economically reasonable and has to have a benefit”.

Electric machines

For instance, electrical machines require less maintenance, according to Greschner, because they do not need filter changes, oil changes, and so on.

“This is much easier for rental companies to deal with because they can leave the machines out on much longer cycles,” says Greschner. Not only are lifetime costs reduced but safety is also enhanced by the fact that engineers do not have to visit the equipment on site so frequently.

“I think we have now, across all our products, economically reasonable models where the payback for our customers is achieved in 2-3 years,” adds Greschner.

The upfront cost of such equipment is higher, though, and this is where rental plays an important role for Wacker Neuson.

“In the main rental markets, such as the UK, France and Scandinavia, we see that the rental parks are extremely important for us to introduce such new products because, in the beginning, there is a reluctance on the contractor side,” says Greschner. “And, obviously, the more utilisation you have on such a machine, the sooner you have your payback. So the sharing economy idea helps to launch such a new technology.”

In the UK, Lynch Plant Hire saw activity levels drop during the lockdown. However, roadwork projects continued to be busy. This is because roadbuilding activity was identified as key for the future of the UK’s Critical National Infrastructure (CNI), and the emptier roads during lockdown provided an opportunity to fast track existing roadbuilding projects.

Over the last few years, Lynch has worked with Highways England to supply machines for some of its latest smart motorway projects, including work on the M23, M4 and M26.

For the recent smart motorway building projects,



Dynapac’s new Seismic-enabled rollers monitor the soil to adjust the vibration frequency accordingly

Overcoming adversity

Speaking to *IRN*, Doug Hundt, President of Industrial Solutions at Vermeer, sheds some light on the roadbuilding sector and the effects of the Covid-19 pandemic.

On the topic of governments using infrastructure investment to stimulate economies following the Covid-19 crisis, Hundt says, “Many countries have aging and neglected roadways that need repair. Investing in roadbuilding and related infrastructure construction has historically been a productive way to stimulate the economy in recessed times.”

He adds that there is also a general need to repair ageing water and sewer infrastructure, which can often be done at the same time as roadworks, maximising return on investment.

“We are seeing many communities starting projects to repair, replace and expand this type of infrastructure to support their growing populations,” says Hundt. “People want to live where they have access to good roads, clean water and high-speed internet connections. We anticipate that there will continue to be a high demand in the construction industry for this type of work for many years to come.”

When asked about the pandemic’s impact on Vermeer, Hundt says, “At the outset of the pandemic, we at Vermeer immediately developed a plan and put specific safety measures in place. Anyone who could do their job from home was encouraged to.”

“Since then, there has been a gradual return to the office approach implemented while still ensuring social distancing guidelines can be followed. Vermeer continues to monitor guidance from the CDC [Centers for Disease Control and Prevention] and WHO [World Health Organisation], while tracking local numbers and trends, and will align protocols as needed.”



Special precautions taken at Vermeer’s manufacturing facilities include additional cleaning and disinfecting, the checking of people’s temperatures and the implementation of health screenings.

Hundt says, “Vermeer sits right in the middle of the overall supply chain, and therefore we have been impacted on the receiving, sending and operational sides of our business.”

However, he adds that Vermeer has had experience dealing with crisis situations, such as two years ago when its Pella, Iowa, facility was struck by a tornado, wiping out a significant proportion of the company’s manufacturing footprint.

“The experience reaffirmed that we can overcome adversity,” says Hundt. He adds, “We’ve all supported each other to ensure we’re responding to our customers’ needs and keeping everyone safe during these unusual times.”

Doug Hundt, President of Industrial Solutions at Vermeer

it was estimated that 90% of the machines rented were from Kubota’s 5 tonne range.

Chris Gill, Director at Lynch, said, “Kubota’s machines are very reliable and their compact design allows for excellent manoeuvrability in tight spaces, which is a priority for our customers.”

“The sustainability of the machines is also particularly important for these types of projects. All of Kubota’s machines come fitted with Stage V compliant engines.”

Promenade project

On the Isle of Man, a £25 million promenade project is being carried out in the island’s capital city Douglas. The promenade is being overhauled, with the highway being reconstructed for the first time since 1935.

Groundworks company Stephen Christian & Sons is working on the initial stages of the project, which involve the installation of new utilities including electric, water, gas telecoms and street lighting.

For this, the company is using a Case TR270 compact tracked loader with a Case T450 Rock Wheel attachment, recommended by Case dealer Dennis Barnfield Ltd.

The dealer’s Managing Director Graham Barnfield said of the TR270, “It may be compact, but it packs a punch when it comes to power and torque, and it delivers consistent performance in the most demanding conditions.”

“We supplied a high-flow hydraulics package with this machine to deliver as much power as possible to the rock wheel. This package supplies 55% more



One of Hitachi’s Zaxis 130 LCN excavators in use on the A6 Dualling Scheme

flow than the standard hydraulics package and comes with a 14-pin electric plug socket to operate the attachment.”

Speaking about the T450 Rock Wheel, Richard Christian, Director of Stephen Christian & Sons, said, “It’s a great tool for our utility contracts and cuts through the road with ease. On the Douglas promenade job, we’re cutting through 200mm of reinforced concrete and 50mm of asphalt with no problems.”

The Case T450 Rock Wheel is also available for the new Case B-series range of skid steer loaders, launched in March 2020.

Meanwhile, in Northern Ireland £160 million is being spent upgrading the A6. The A6 Dualling >

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Caterpillar recently launch the Cat Command for Compaction. (Inset) Once Cat Command for Compaction is put into 'auto', the system controls the propulsion, steering and vibration

Recent jobs are saved in the system and can be

accessed via the touchscreen.

Cat Command for Compaction is available for use on select Cat vibratory soil compactors.

Volvo Construction Equipment (CE) has introduced a new compactor, the DD128C, which delivers a frequency of 4,800vpm, allowing the machine to move at faster rolling speeds.

The DD128C has a 1,400mm diameter, 2,000mm wide drum with chamfer and radii drum edges, and it is equipped with an automatic drum wetting system that provides speed-dependent water flow to minimise water usage and ensure uniform drum coverage to prevent material pick-up.

The machine also features auto-reversing eccentrics, which is an automatic function that ensures eccentric rotation in the direction the machine is travelling, to achieve a smooth finish.

The roller can be used on surfaces of various thicknesses due to the fact that it has a range of amplitudes from 0.08 to 0.8mm.

Providing pressure

Meanwhile, Kaeser Kompressoren's latest addition to its 5m³ range of portable air compressors, the Mobile M59, offers a range of pressures from 6 to 14 bar.

The unit's range is enabled by its flexible pV control system, which allows it to operate a breaker at a maximum pressure of 7 bar or perform sandblasting work at 10 bar, for example.

The infinitely adjustable maximum pressure (p) directly influences the maximum flow rate (V).

The pV control system also serves to >

Scheme is improving a 14.7km stretch of road that is used by 18,000 vehicles each day.

The Graham Farrans Joint Venture responsible for the project has subcontracted the utilities work to RB McGeary Contracts.

Safety management

Robin Kirkpatrick, Project Health and Safety Manager, said, "We use RB McGeary Contracts for their specialist skills and good safety management."

He added, "It's also good to see their fleet of new and well-maintained Hitachi machines on site. We obviously have a big emphasis on safety when it comes to plant working near pedestrians, so 360° vision around the equipment is vital to safeguard them."

Making reference specifically to the ZX33U-5 and ZX38U-5 models, Ronnie McGeary, owner of RB McGeary Contracts, highlighted the residual value of the Hitachi equipment it uses, saying, "We usually change our machines every three years and benefit from the strong second-hand values of Zaxis excavators."

According to Mark Black, General Manager of Dynapac, "The biggest issue in compaction for operators has always been knowing you have achieved the right compaction levels required onsite, as quickly and effectively as possible."

For this reason, the manufacturer has introduced its new Seismic Roller to improve compaction performance.

Black continued, "What people unfamiliar with compaction also don't know is that over compaction can be as serious an issue as under compaction. This is because it damages the integrity of the material in the built-up layers."

The Seismic-enabled rollers come with a sensor and algorithm that monitor the soil to sense what the ideal frequency for the drum is.

The machines also come with an Active Bouncing Control (ABC) system to avoid over compaction.

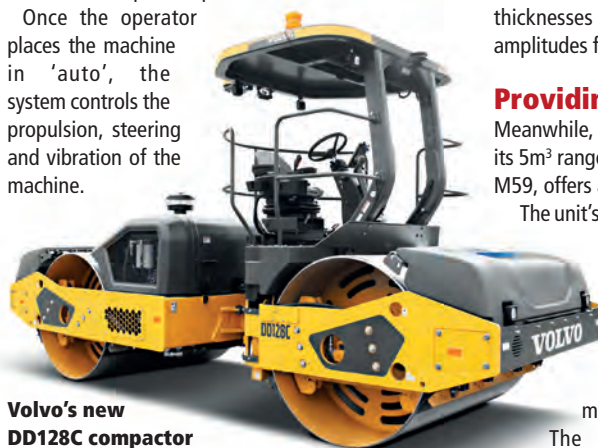
Black said, "The ABC system monitors the drum of the machine. If the machine has achieved the

maximum possible compaction (given its size) and starts to double bounce, the ABC will activate and shut the drum vibration off."

Also with the aim of enhancing compaction results, Caterpillar recently launched Cat Command for Compaction. It is an operator-assisted technology that automates the soil compaction process and thereby helps to minimise operator skill gaps, according to Caterpillar.

To set it up, a touchscreen interface is installed in the cab and the system connects to the common base stations. The operator then uses the machine to map the boundaries of the area to be compacted and enters the compaction parameters.

Once the operator places the machine in 'auto', the system controls the propulsion, steering and vibration of the machine.



Volvo's new DD128C compactor

Spreading out

Spain-based contractor Construcciones Bagudanch Serra recently purchased Bobcat's new soil and asphalt spreader attachment.

Mounted on the company's Bobcat T650 compact tracked loader, the new soil and asphalt spreader provides an alternative to laying asphalt by hand.

David Bagudanch, Managing Director of Construcciones Bagudanch Serra, said, "The new Bobcat soil and asphalt spreader has already saved us a lot of time, increased profitability and above all has improved the quality of the finish. It is also simple to operate and allows the work to be done with fewer operators."

The spreader has an operating weight of 675kg and a standard operating width of 190cm or an optional width of 196cm.

Due to the fact that it is offset, the new attachment can lay asphalt without the loader needing to pass over the spread material, ensuring a smoother finish.

Bagudanch said, "Since we took delivery of the new attachment, we have carried out work to replace deteriorated asphalt surfaces on streets and housing estates with very good results. The compact size of the equipment allows it to be used in areas such as gated communities, without having to close off access and use of local roads."



Bobcat's new soil and asphalt spreader at work in Spain

The Mobile M59 is the latest addition to Kaeser Kompressoren's 5m³ range of portable air compressors





Vermeer's new RTX1250i2 ride-on tractor is based on the design of the company's RTX1250

speeds and offers optional vibration, uses high centrifugal force and sheepfoot drums to compact clay-like soils that are saturated with water.

New from Vermeer is the RTX1250i2 ride-on tractor with intelligent controls and interchangeable attachments for utility installation work.

Based on the design of its predecessor, the RTX1250, the new model was said to have the latest technology to make it more convenient and efficient to operate.

The intelligent controls include Productivity Zone, Auto Plunge, TrenchSense and Ecolidle.

Productivity Zone identifies the optimal operating range and ground speed for the rear attachment being used.

Auto Plunge can be used to monitor engine speed and reduce the rate of plunge automatically for a trencher or rockwheel attachment so that the rpm does not drop too far.

The onboard TrenchSense electronic control system helps prevent the engine from stalling when working in challenging ground conditions, and the Ecolidle engine control system can help reduce fuel consumption by automatically lowering the engine's speed to an idle if the tractor has not been active for 30 seconds.

The RTX1250i2 can be reconfigured with various intelligent i2 attachments, from trenchers to plows and backfill blades to reel carriers, that can be switched over in 60 minutes.

IRN



Weber MT's new remote control, Stage V compliant MC 85 trench roller in action



A U110 Utility air compressors mounted directly behind the driver's cabin

Compressors for road signalling

Atlas Copco's U110 Utility air compressors are to be installed by Portuguese road signalling equipment company FL Gaspar into its road signalling vehicles.

The compressor's compact design, measuring 1580x740x850mm, and low weight, according to Atlas Copco, makes it good for vehicle-mounted applications.

Situated directly behind the driver's cabin on FL Gaspar's trucks, the units will not impinge on the vehicles' capacity to carry other equipment.

Each compressor provides a free air delivery rate of 2.8m³/min, and they can deliver pressures from 5 to 10.5 bar.

counteract potential pressure losses when working with long hose lines.

Kaeser said the unit's Sigma Control Smart controller makes it easy to set the pressure. At its lowest pressure setting, the M59 can provide a flow rate of up to 5.5m³/min.

The new model is powered by a Stage V compliant Hatz engine.

Since the engine requires a diesel particulate filter (DPF), Kaeser has replaced polyethylene structural elements with aluminium to keep the model lightweight while maintaining robustness and long-term value retention, according to the company.

A new piece of equipment from German manufacturer Weber MT is the MC 85 trench roller.

Weber said the new model incorporates a 'self-explanatory' radio remote control with an automatic stop feature for safety. The remote control can also be used to carry out machine diagnostics.

Described by Weber as 'effective and energy-efficient', the new model was developed with customer requests in mind and designed to meet equipment regulations around the world.

Minimising emissions

Adhering to Stage V and Tier 4 Final, the MC 85 features a three-cylinder Kubota diesel engine and an eco-mode that allows the engine to idle when the remote control is not being used.

Weber said the trench roller, which has two driving

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HKL's "undaunted"

Kay Städing, HKL's CEO, tells *IRN* about plans to open five depots during its 50th anniversary year

Despite it being a challenging year on account of the Covid-19 pandemic, HKL Baumaschinen is demonstrating its "undaunted optimism" with plans to open five new depots during 2020, the company's 50th anniversary year.

The new depots will be located in the company's home market of Germany – in Berlin, Dresden, Forchheim, Fulda and Hamm.

Proximity to the customer has been a key concern in choosing the locations of the new depots, according to the company's CEO Kay Städing; "Our goal is that the customers can get to us quickly and without detours."

While the products offered by each depot will vary according to the specific needs of customers in each location, they will all supply general equipment, such as mini excavators, wheeled loaders and compaction equipment. The new depots will also have shops for products that are required on a daily basis, such as tools and consumables.

Speaking generally about HKL's network, Städing says, "The larger centres in strong economic regions offer an even larger range of products and services. And for special market requirements there are the competence centers for construction site modular space systems, access platforms and power generators."

HKL is also present in Poland and Austria, and while no new locations are planned for Poland (where there are currently seven depots), the company is looking to expand its network of six depots in Austria.

"HKL has been present in several countries in the past decades," says Städing. "However, experience has shown that concentrating on Germany, Austria and Poland is the most efficient way for us."

Making history

Having studied business administration, Städing joined HKL in 1990, twenty years after his father, Claus Städing, founded the company with two partners, in 1970.

"They started with the rental of construction machines and equipment. That was pretty visionary in those times and it was implemented in a really progressive way," says Städing.

Soon after, they started offering servicing to enhance machine dependability and availability; "Increasing the benefit to the customer was the main concern with all these steps," says Städing.

The range of services offered by HKL grew steadily, and the company enjoyed particularly strong growth after the reunification of Germany, during which time HKL built trust with customers in major Eastern German cities.

Städing says, "We continued to expand until, in the end, we had established a network of more than 150 centers all over Germany."

In 2019, HKL generated revenues of €380 million,

putting it in 34th position in this year's IRN100 ranking of the world largest rental companies, published in the June issue of *IRN*.

HKL now employs more than 1,400 people and has in excess of 80,000 products in its rental range. The company also has a large inventory of used and new equipment for sale.

A changing market

The rental market is in constant flux, according to Städing, but he says what is different now is the pace at which the market is changing, and how customer behaviour is shifting too.

New digital communication channels have enabled more targeted communication and they make information about products available at any time. Digitalisation also has the effect of making things more transparent, says Städing.

"HKL has done a lot recently to digitalise its processes. And we will continue to follow that path strictly. However, we are convinced that personal contact will still play a major role in the future."

Kay Städing, CEO of HKL Baumaschinen



“ It is the primary task of a good rental company to permanently address the changing requirements of the market. ”

optimism"

One of HKL's new depots is in Hamm, opened in May, 2020



The business consists of people with different needs, whom we want to reach through different channels."

Over the past 50 years, the role of rental companies has also shifted from simply supplying equipment to becoming total solutions providers.

"Providing rental machinery is one thing; the other is add-ons or simplifications to make it easier for the customer to perform their own tasks," says Ståding.

This includes making communications simpler by minimising the number of people the customer has to contact; offering easy and flexible order processes; and ensuring equipment is well suited to a given task, based on past experience.

In conjunction with this, HKL's rental fleet has

evolved; "It is the primary task of a good rental company to permanently address the changing requirements of the market," says Ståding. "This means new ideas have to be developed and useful additional offers must be created."

HKL originally supplied only construction machines, but then expanded into modular space. This was followed by telescopic handlers, vehicles, boom lifts and power generators.

"Aside from the general equipment, specific competence centres were established to be able to offer expert knowledge in a focused way," says Ståding.

This requires constant investment, in both the fleet and rental depots.

Although Ståding does not offer any figures, when asked about the impact of Covid-19 on HKL's fleet investment plans he says, "Like all businesses we had to readjust our plans for 2020 at the beginning of the year. The fact that nothing was known about the course and the duration of the situation made a readjustment for the future especially difficult."

And looking further ahead to 2021; "This of course completely depends on how the current business year is going. If the public sector and trade and industry authorise and execute investments, we will of course be supporting our customers with all our strength and power in 2021."

On the topic of hybrid and electric equipment, Ståding says HKL closely monitors the development of alternative drives and asks its customers about their needs; "There is already some promising electric equipment available in the HKL rental park.

However, currently these are smaller devices and tools. The market will definitely open further in the coming years and we will then naturally offer the best solutions."

Adapting to Covid-19

Speaking about the effects of the Covid-19 pandemic on operations, Ståding says the company reacted quickly; "As the lock-down measures were implemented step by step, we as a service provider with personal contact with our customers were able to assess pretty well what we had to do.

"Fortunately, as a company dealing mainly with commercial customers, we were not hit as hard by the cuts. However, we did have to organise and learn a lot."

HKL put in place the necessary IT infrastructure for much of its staff to work from home, which Ståding says was critical to allowing the company to continue operating during the peak of the crisis.

Meanwhile, employees who had to continue working in the depots were protected in accordance with government guidelines, with the implementation of mask wearing and disinfection stations. Also, customer contact was limited to phone calls.

HKL's entire depot network remained open, except in Austria where the lockdown meant they had to be closed for a period.

Regarding the impact on revenues, Ståding says, "The crisis of 2008/9 definitely had a lesser impact in the real economy on our company than the current pandemic. However, I do think that we are not yet able to seriously assess this. It will certainly continue to occupy us in all areas."

During the peak of the pandemic, there was a surge in online traffic and telephone calls; "However, we do have a pretty good contact rate via these channels anyway, therefore the increase wasn't remarkable," says Ståding, adding that he expects there to be a higher level of digital communication in future, as a result of the pandemic.

Also, one positive outcome of the pandemic is that it will enable HKL to organise itself more efficiently going forwards, according to Ståding, because the crisis has shown up areas of inefficiency within the business.

"We will try to make use of the opportunities this challenge presents to us," Ståding says. "In any case, we are ready."

IRN

HKL's headquarters in Hamburg in the 1980s



Included in HKL's portfolio of special equipment are generators



Rentaga and Rentuu both say the rental industry has some catching up to do because customers increasingly expect to be able to order things at the click of a button. One company is an aggregator and the other a franchiser. Thomas Allen speaks with the companies' founders to hear about their different approaches

An example of what a rental partner's dashboard looks like on Rentaga

Strength in numbers

It is widely recognised that the construction industry – and, within it, the equipment rental sector – is under-digitalised compared with other industries. Before the Covid-19 pandemic brought this into sharp focus for everyone, Jacques Valckenaere and Hanne Hejgaard saw a gap in the market for a digital rental platform. They saw services like Booking.com for the hotel industry and Skyscanner for comparing flights online, but no equivalent for equipment rental.

So, in 2016, the concept of Rentaga began to take shape, as an online space where contractors can compare and rent equipment from various suppliers.

Valckenaere – the company's CEO – and Hejgaard – its Advisory Board – crossed paths when working for telematics provider Trackunit. Valckenaere was OEM Partnership Manager at the company from 2009 to 2016, while Hejgaard served as Country Manager for the BeNeLux markets between 2012 and 2016.

They each have about fifteen years' experience in the construction equipment industry; Hejgaard says, "We know the environment very well, both on the

“Our platform allows rental companies to recognise their preferred customers.”

HANNE HEJGAARD



Jacques Valckenaere, co-founder and CEO of Rentaga

supplier side and on the customer side.”

In 2018, they met Junaid Jalap, a computer scientist who has been working at a technical and management level in IT companies for more than 18 years. Together, they spent a year developing the Rentaga platform, with Jalap acting as the Chief Information

Officer.

Technology roadmap

"I am mostly responsible for the end-to-end product development and defining the technology roadmap for the platform," says Jalap.

The fourth founder, investor Michel Ehrlich, has helped to provide the capital necessary to get the platform off the ground. Collectively, the four founders have invested just over €250,000 and are now in the process of raising €1.5 million for the next phase of development.

Rentaga launched at the start of 2020,

starting in Belgium and Luxembourg; "We are now moving halfway into Holland," says Valckenaere, adding that they are close to closing some partnership agreements with Dutch rental companies.

He says, "Our intention is to go across Europe."

Explaining how the platform works, Valckenaere says rental partners make available their equipment on the platform and then customers can log in to search for and rent products.

Although the concept of Rentaga might be simple, the execution is a little more complex.

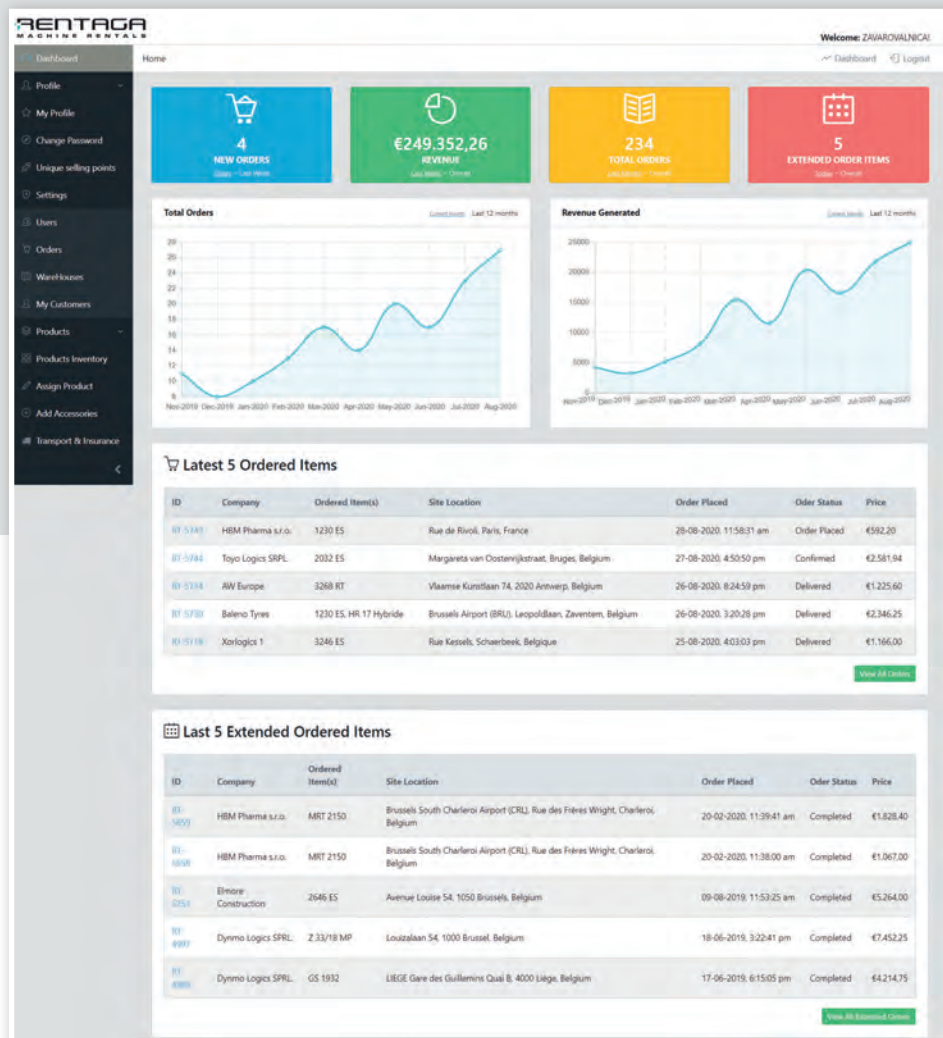
"Ideally, we would have a fully-automated approach where we could connect through a rental partner's ERP [enterprise resource planning] so that we have a real-time inventory from their system and

we could submit orders in real-time to their system," says Jalap. "But that was a challenge because the rental firms aren't up-to-date on that side."

So Rentaga has had to adapt, making the process less automated. Rental partners instead upload their inventory through a CSV file or Excel sheet.

"This means we have an unlimited

Hanne Hejgaard, co-founder and Advisory Board of Rentaga



stock amount from them," says Valckenaere, "because this industry typically doesn't say no. So even if they have only five excavators themselves, and somebody wants two more, they're going to move heaven and hell to provide them by re-renting them from a competitor, typically."

Model information

To reduce the burden on rental partners of inputting the details of all their available equipment when they join the platform, Rentaga is working with OEMs to get them to supply the relevant information for all the models they have on the market. This way, Rentaga ensures that all the names, model numbers, descriptions and images are correct and standardised.

"So we will have central control on the product database," says Jalap, "and whenever a new partner or supplier joins our platform, they can just associate those products in the inventory."

In return, the OEMs are given the opportunity to freely announce the launch of new equipment and services via banners on the platform, promoting those products to end consumers and rental companies simultaneously.

"Eventually, we intend to make it a global database of equipment," says Jalap. Although this function is not fully accessible to OEMs yet, Rentaga so far has commitment from Manitou, Genie and JLG.

Not all types of equipment will be listed on the platform though. For example, Hejgaard says, "We might not have a very specialised machine or a very specialised crane where you would need an operator to work with the machine. In these cases, the customer will still need to go to the rental company and get advice and discuss how to do the job."

"So it is not the case that we are eliminating all the rental with the partners; we are more taking what we call the automated orders. A lot of people in this business know exactly what they want – they know what brand they want, which type of machine – and this is where the platform is brilliant."

Recognising that rental companies are concerned about price wars, Rentaga gives its rental partners the ability to highlight their unique selling points, such as 24-hour service, to explain their pricing.

Valckenaere likens it to booking a hotel room on a comparison site; "You don't necessarily go for the cheapest room; you maybe go for the room with breakfast because you always have breakfast."

Rentaga also acknowledges that rental customers are often loyal to their suppliers because, quite aside from pricing, they must feel they can rely on a rental company to supply good-quality equipment on time.

"So what we developed on our platform is a feature allowing the suppliers to recognise their preferred customers so that there is a VAT match, ensuing that these customers will get their negotiated prices right away," says Hejgaard.

The rental partners have a dashboard where they can add equipment, define prices and set up discounts. Those discounts can be applied across all their equipment or only to specific groups of equipment, and for all customers or just individuals.

They are also able to view their turnover on the platform and see running orders.

Customers also have a similar dashboard through

which they can access their history on the platform.

How does Rentaga differentiate itself from other equipment rental aggregators though?

Valckenaere says, "There are some actors in Belgium, England, France and Germany that have very similar businesses, but still different. They also have an e-platform but then they start to broker whatever they have collected as rental propositions with rental companies."

"That means, on those platforms, you can only put in a request for a booking, they go and shop around and will confirm what you requested with a rental company."

"On our platform, you can book immediately because we have a commitment from our partners that whatever they put on our system is one-to-one bookable. So we are really a direct booking organisation like Booking.com, and not a broker like Ritchie Bros."

Acting as intermediary

So Rentaga is just an intermediary, putting customers in contact with rental firms and taking a percentage of the rental fee directly from the supplier. The rental companies themselves are responsible for the logistics, servicing, invoicing, and so on.

Valckenaere says, "The rental companies prefer this model to an intermediary who doesn't say who the end customer is because, at the end of the day, a Klarx, a ClickRent, a SmartYard, they come with a proposal to, let's say, Lavendon, and Lavendon doesn't know to whom this machine is going to go. So it might go to one of their own customers at the wrong price – higher or lower – they don't know."

Ultimately, Valckenaere says Rentaga gives its mid-sized partners a way to unify against the big players; "Sooner or later, there will be just a few big ones – United Rentals in the US, Loxam in Europe, and then besides that you have a few guys like Boels and Kiloutou. So these mid-size guys need to unify to be reactive against them."

IRN >

Junaid Jalap, co-founder and CIO of Rentaga



Ivan Marchandise, owner and CEO of BNP Paribas, the first company to join Rentaga

Winning over partners

Valckenaere and Hejgaard had been testing the water for a while before launching the platform, asking rental companies what they thought of the concept, and they were apparently aware that it was coming, that this was the future of the industry, but were doing little about it.

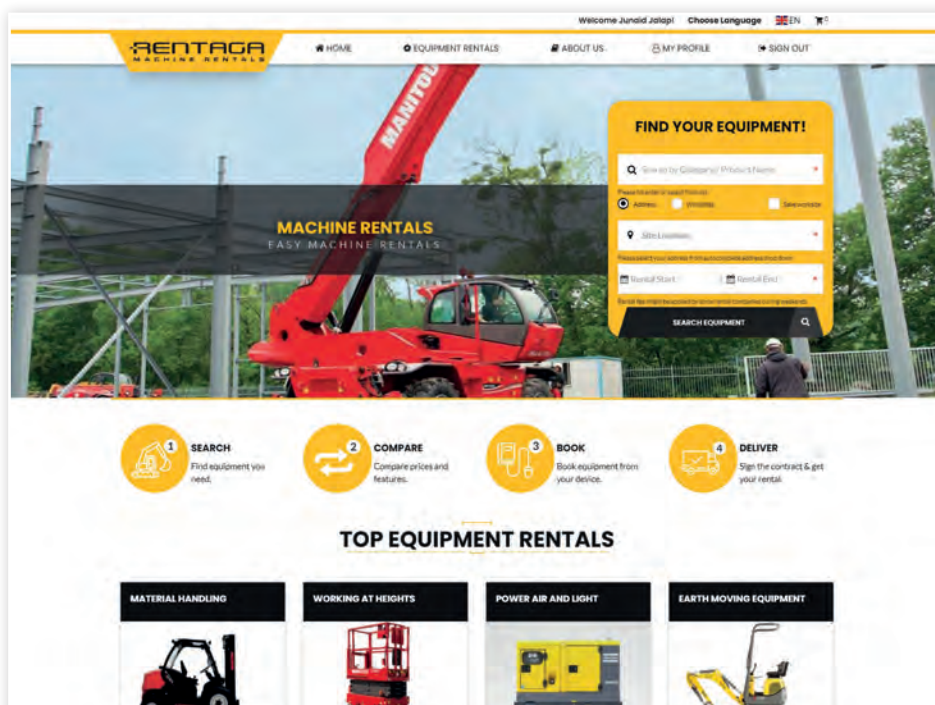
Although the pandemic is helping to drive the adoption of digital processes in the rental sector, which is of benefit to Rentaga, it has also been a hindrance during the company's early development.

"In January and February, we had the first orders coming in," says Hejgaard, "and then, of course, in March everything came to a full stop."

Activity is now starting to return though, and Rentaga's founders have a pool of companies they would like to get on board. But there is some reluctance among rental companies to be the first to sign up.

So far, Belgian company BNP Paribas is on board, serving the whole of Belgium and Luxembourg, and Rentaga is in advanced talks with one German, one Luxembourgian and three Dutch firms.

"The three Dutch partners that were talking with us in December delayed everything until now, in June, they started talking again," says Valckenaere. Covid-19 put a pause on discussions.



Rentaga is focused on standard rather than specialised construction equipment

Easing the pain

Transparency can be an issue in the rental industry. This is a problem that Andrea Guzzoni, CEO of technology company Rentuu, came up against when managing the rental operations of Tanzanian company Jumia/Jovago several years ago.

"I realised how difficult it was for us to check the background of equipment, such as health and safety, and maintenance, online," he tells *IRN*.

After doing some research, Guzzoni discovered that the problem was not specific to Tanzania but also existed in more developed rental markets like the Netherlands and the UK.

Helping mid-sized companies

Guzzoni, who has a background in economics, studied market research through data and digital marketing at Imperial College London. After five years of working around the world, following his studies, Guzzoni returned to the UK about five years ago to help mid-sized rental companies overcome the issue he had identified.

"Some of them are really good at what they do," he says, "but usually rental companies hate two things: marketing and technology. It's very far from their core business."

After a couple of years spent developing digital technologies to support rental companies, in 2019 Rentuu caught the attention of easyGroup, the parent company of easyJet, founded by Stelios Haji-Ioannou.

A commercial agreement was reached whereby Rentuu was given the rights to two equipment rental brands, easyEventHire and easyToolHire, across 31 territories, including the EU member states, Switzerland and Monaco.

"We have the technology, easy has a strong brand," says Guzzoni.

Suggesting that the rental industry is dominated by people in their 50s, on average, Guzzoni says one of the main advantages of having the easy brand is that it is well recognised by this target audience as one that they can trust to process online payments;



Rentuu's CCO Dennis Helderman (left) and CEO Andrea Guzzoni (right)

"We work with mid-sized businesses that are very good at what they do – they have a very strong regional presence – and we help them by giving them the brand and allowing them to run on our software.

"So basically, it's franchising because there is the brand, and licensing because there is also our software that allows them to run their operation, plus the marketing we do."

Divide and conquer

Taking the UK as an example, Rentuu is dividing it into regions – six areas in England, plus Northern Ireland, Wales and Scotland – and then looking to have separate rental companies managing each of those areas exclusively under the easyToolHire brand.

With the easyEventHire brand, there is one important difference though: a single company

"We saw it as the only way to really bring dynamic pricing and online booking to the rental industry."

Through this agreement with easy, Rentuu has developed a business model that combines franchising with licensing.

With the easyEventHire brand, the whole of the UK is covered by one company, Event Hire UK

Crowd funding

Rentuu has plans to launch a crowd funding campaign in the UK at the start of October.

"We have a healthy runway as a business, we have strong investors, but we think we are in that sweet spot where we can get a lot of our clientele and a lot of our supporters from the rental space to join us," says Guzzoni.

"Not everyone has the same opportunity as Stelios in terms of liquidity but a lot of people maybe believe in the project and want to join us with, say, £250-500, and they can be part of this digitalisation of the rental space."

He adds, "We're going to really use this opportunity to expand in the UK market especially, to better structure new tech solutions, like the opportunity to self-pick-up and self-deliver."

The easy brand is trusted by Rentuu's target audience for processing online payments, according to Guzzoni

to ditch their own brand they're working on – usually a family brand. So they can keep their own brand but also use the easy brand and be 'easyToolHire Essex' or 'easyToolHire Kent', for example. So it's an opportunity for them to expand their network and get better marketing opportunities."

So, once these rental partners have signed the five-year contract, they will continue to operate independently, with their own products, contracts, insurance, and so on, but they will be able to add the easyToolHire branding to things like their depots, equipment and delivery vehicles – effectively becoming a franchise.

On the licensing side of things, Rentuu provides an easyToolHire branded version of the company's website that is enabled with functions such as online ordering and dynamic pricing, and also helps with marketing.

Integration process

Rentuu starts by integrating into the CRM (customer relationship management) system all the various touchpoints the customers have with the rental company; "We need to make sure that they find our partner easyToolHire online and that it's very well integrated with the business, to make sure that

their drive to pick up equipment from the store is successful," says Guzzoni.

The next thing is to offer them the opportunity to introduce dynamic pricing.

"The difference between us and a consulting company," says Guzzoni, "is that we have four years of experience doing this specifically for the rental industry."

With regard to marketing, Rentuu reorganises the company's calendar, since the companies it works with often do not consider seasonality and for which projects their products are being rented, according to Guzzoni.

"We look at the product data and create a very nice opportunity for the company to check >

Setting standards

Guzzoni is enthusiastic about the opportunity this new business venture might present for franchised companies to cooperate by sharing best practices and setting high standards in the sector.

"How exciting it would be to bring together five Italian, five Spanish, five French, five English mid-sized rental companies at the same table," Guzzoni says. "They're all the same sort of mid-size local business, so nobody is really competing with each other. It's just an opportunity to create a table where you never know where the best idea will come from."

He adds, "We want to start standardising certain criteria that we believe are important for the future of the rental industry."

This would mean a customer using easyToolHire in the UK could expect a similar level of service from easyNoleggio if they also had a project in Italy, for example.

While they are different companies, Guzzoni says customers will be able to rest assured that the way they operate, the quality of the machinery they are supplying, and the online experience will be of the same high standard.

“ We give assets to the companies but they don't have to ditch their own brand; they can keep their own brand but also use the easy brand. ”

ANDREA GUZZONI

covers the whole of the country – in the UK, it is currently Event Hire UK, which has five depots across England.

The reason Guzzoni gives for this approach is that "events move".

"For tool rental, usually 90% of our clients and jobs are very close to the branch. It's very unlikely that someone orders machinery from very far away, while for events it's completely different," he says, adding that equipment rental requires maintenance, so the depot needs to be nearby, whereas chairs and tables for a wedding, for example, do not have that same need for proximity.

Explaining how it works, Guzzoni says, "We give assets to the companies but they don't have

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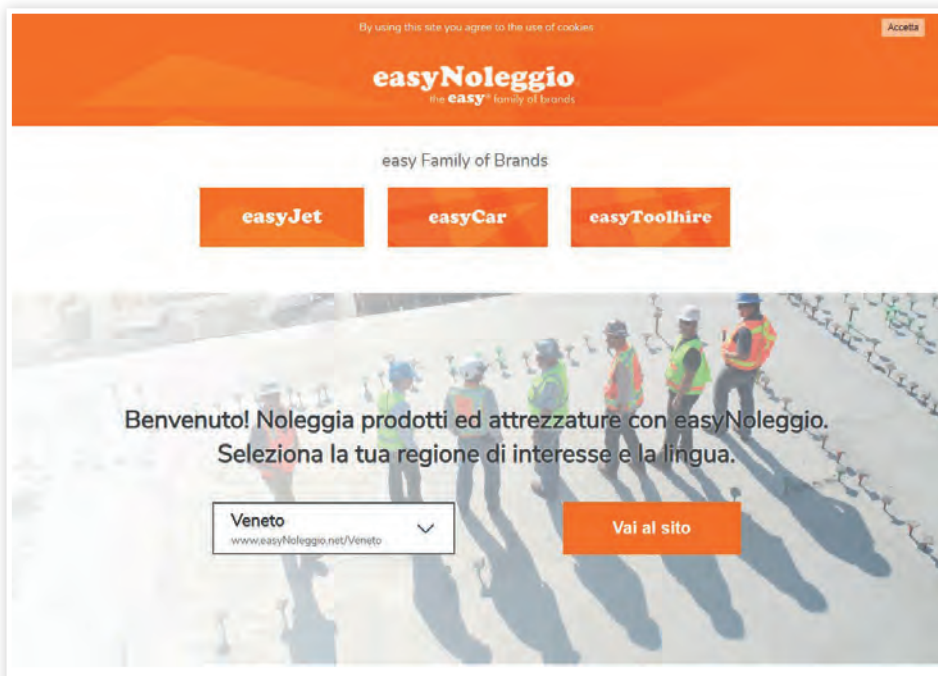


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seasonality, type of client and the project," he says. "That's important work. That structure is critical for our online marketing." And an important part of it is understanding the lead time between a client placing an order and when they need it delivered, Guzzoni adds.

"So it's much more personalised than a platform," Guzzoni says.

Rentuu started as a platform but soon shifted away from this; "We realised that dealing with a small number of companies allowed us to really create a relationship and create value," says Guzzoni. "And that's why, when we got the opportunity with easy, we didn't do it as a marketplace or as a franchise where everyone can add their logo and be part of a family. Instead we actually select certain companies... we go through due diligence for the companies, we make sure they respect all the health and safety standards in the UK and in other countries in Europe, and then we work with them."

Selecting partners

When asked what the key criteria are for selecting rental companies to partner with, Guzzoni says, "The most important thing for us is the management of these companies."

"It's critical that we have business owners that want to create something new... We enable them to realise some of the dreams that maybe they really wanted to build for themselves but they couldn't because it's expensive."

Guzzoni gives Mauro Brunelli as an example, the Director of Up Rent, with which Rentuu recently partnered in Italy to cover the Veneto region under the easyNoleggio brand ('noleggio' translates as 'rental').

"He has a very long-term vision of the rental industry and technology," says Guzzoni.

"We're really seeing the difference in Italy now in the rental space with the generation change," he adds, "because there is not only a greater desire to accept and invest in technology but also a desire to fulfil all our checks, like health and safety, and corruption, to ensure they're of a certain standard that for us, being part of a brand like easy and being a UK company, must be respected."

“It's critical for us that we have business owners that want to create something new... We enable them to realise some of the dreams that maybe they couldn't build.”

ANDREA GUZZONI

In its search for rental partners, Rentuu is also looking for companies that are regional; "By regional this means they usually have three depots at least, but no more than seven. Our sweet spot is probably five depots. So it's mid-size."

But how does Rentuu go about finding the right companies? It consults rental associations.

"In Italy, for example, we partnered up with the Italian rental association. The Italian rental association director, Marco Prosperi, became our de facto country manager."

This is because they are the ones who have the relationships with rental businesses and will know which ones are the best fit.

Industry advisors

Also, Josh Nickell, consultant with the American Rental Association, and Graham Arundell, CEO of Hire Association Europe (HAE) and Event Hire Association (EHA), are acting as industry advisors to easyHire.

Certain products work better than others on easyToolHire, such as forklifts, generators and gardening tools, Guzzoni says; "I don't see things like cranes or scaffolding being rented through easyToolHire."

"So we want these companies to identify what are the categories that, for their region, work very well on easyToolHire and then we can push those. So they can keep their own branding and original website maybe for bigger contractors, like bigger B2B accounts they have, and less for the B2C or

easyNoleggio was launched in Italy earlier this year, covering the Veneto region

smaller B2B cash clients."

Guzzoni likens it to having two entrances to the business – one for larger clients paying by credit, and another for smaller customers paying by cash.

"This, for a rental company that maybe makes £8-10 million per year, is a very sweet opportunity because they can keep their brand for larger core clients but then also acquire many more clients through the easy brand."

Rentuu's launches of easyEventHire in the UK and easyNoleggio in Italy are only the beginning; "We are due to launch easyLocation in France and easyAlquiler in Spain, for tool hire," says Guzzoni. "So we're already having conversations with companies in France and Spain."

Future plans

The company is also planning to launch easyToolHire in the UK in September 2020.

Guzzoni says, "If we keep growing at the same pace, we aim to have 20-30 companies on a European level by the end of 2021."

He adds, "We have a lot of cool projects that we are building and that we know will make a difference to the industry in a few years. But with our partners we want to get there and make sure that what we're building in the back in based on data and based on actual user experiences, because a lot of tech companies out there – as we used to be ourselves – are building something without being on the ground."

Guzzoni says Rentuu has the advantage of spending time working in warehouses and industrial areas; "I think that's what really makes the difference in terms of what we, on a product level, are building for the industry, because we are with them and we get to see what the pain points are on the ground, and not just in a separate office."

So here we have a symbiosis. Rentuu leverages its intimate understanding of its partners' pain points to help them succeed, which in turn drives Rentuu's own success.

IRN



Andrea Guzzoni is one of three industry experts who will be speaking in the IRN webinar: Digitalisation in rental, which will take place on Tuesday 13 October, 2020, at 15:00 (UK time). The other two panellists are Joel Särkkä, CIO of Renta, and Søren Jensen, CCO of Trackunit.

They will be discussing how digital technologies are changing the way the rental industry works and, among other things, will consider whether the Covid-19 pandemic is accelerating the adoption of digital technologies in the sector. Visit [KHL.com](https://www.khl.com) to register for the event for free.

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Chief Commercial Officer
of Trackunit

On Tuesday 13 October, 2020, KHL will be hosting the third of its rental webinars, this time on the theme of digitalisation in the rental industry.

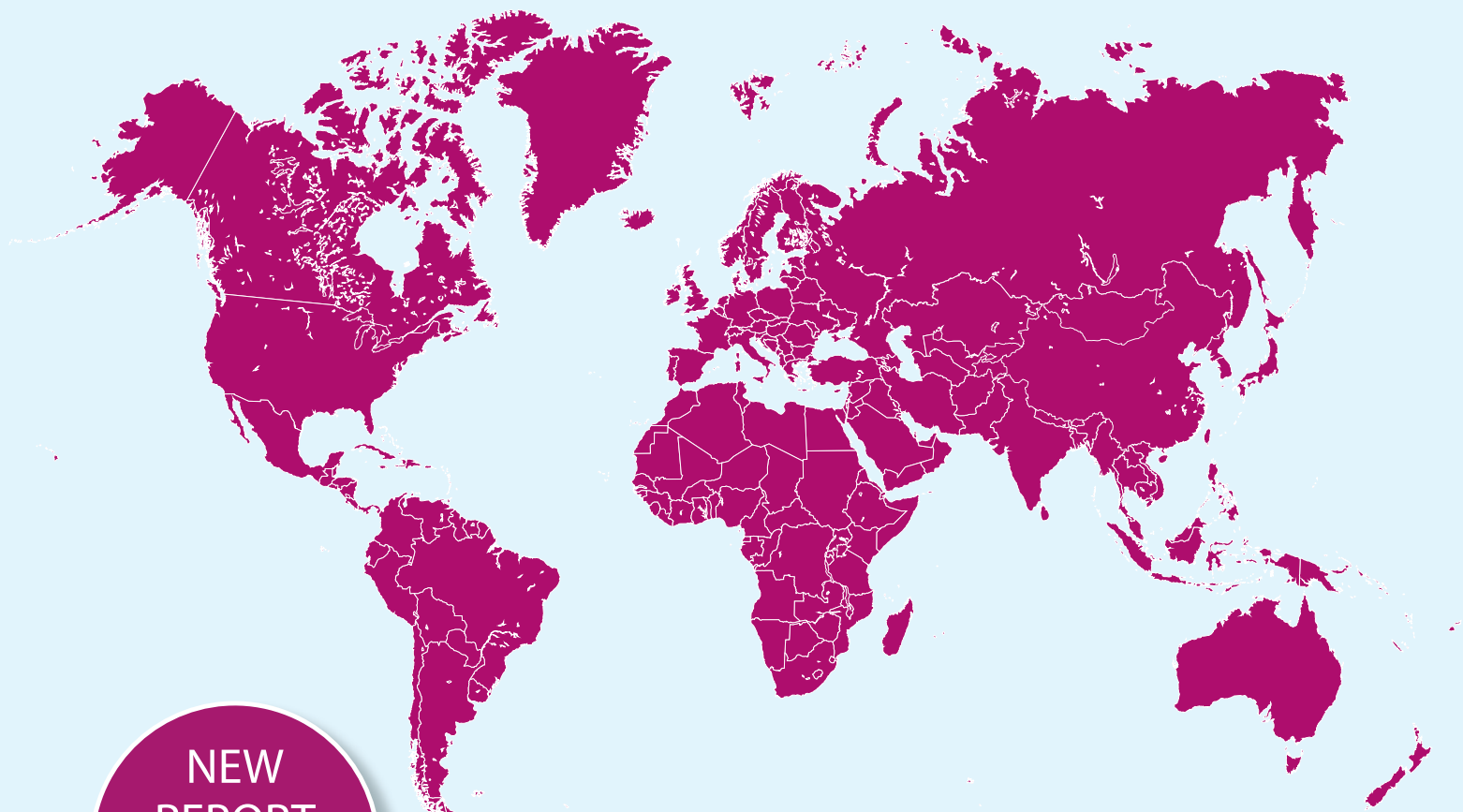
The expert panel will discuss how digital technologies are changing the way the rental industry works, from using artificial intelligence for fleet management to providing rental customers with online channels.

Among the topics discussed will be the effect of the Covid-19 crisis on adoption rates. Has the pandemic opened the industry's eyes to the importance of digitalisation?

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A common framework for suppliers

New ERA Sustainable Supplier Framework provides a harmonised and more effective approach to rental company supplier assessments

The European Rental Association has launched a new Sustainable Supplier Framework to set the industry best practice guidelines and raise common practices for sustainability assessments across the rental industry.

The new Framework, which was developed by an independent consultant based on interviews with rental companies and suppliers, as well as on relevant international standards, will enable a harmonised and more effective approach to sustainable supplier assessments and be beneficial for both rental companies and their suppliers.

Michel Petitjean, Secretary General of the ERA, said, "This common approach will reduce the administrative burden of supplier assessments for rental companies and suppliers, raise standards across the industry and allow rental companies

to consider suppliers against a common set of sustainability requirements.

"Furthermore, it will give rental company customers, such as contractors and public procurers, a clear idea of how the rental industry approaches supplier assessments and demonstrate that the industry is committed to responsible business practices and high standards of sustainability."

The Framework provides a set of minimum requirements and aspirations for sustainability in the areas of:

- Human rights and working conditions
- Health and safety
- Responsible sourcing of components and raw materials
- Environmental performance
- Business ethics
- Product sustainability performance

An extended version of the Framework is available upon request from the ERA, giving rental companies a mechanism for assessing different levels of adherence to the Framework and opening the possibility for them to audit suppliers.

Maria Karlsson from Cramo said, "In 2018, through the ERA Sustainability Committee, Cramo raised the possibility of developing an industry approach to standardise and harmonise the task of supplier assessments for rental companies. As a company with a strong commitment to sustainability, we are delighted to see that this initial idea has become a reality. This Framework demonstrates that the rental industry is committed to sustainability and provides a more effective approach to supplier assessments that will benefit rental companies and their suppliers."

What rental companies can do

Rental companies can adopt the Framework as a code of conduct and request their suppliers declare compliance with the requirements by completing and signing the supplier checklist. This checklist can be used as an integral part of the agreement between the supplier and the rental company.

Alternatively, rental companies are free to adapt the template according to their own requirements, although if adapted, suppliers would no longer be able to claim conformity to the ERA Sustainable Supplier Framework.



Michel Petitjean, Secretary General of the ERA



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About the ERA

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

Extensive information on the ERA's activities, reports and publications is available at www.erarental.org

What suppliers can do

Suppliers will be able to send the signed declaration directly to rental companies and post adherence to the Framework on their websites. They can do this by publishing the signed declaration and displaying the ERA Sustainable Supplier Framework logo.

Any supplier to the rental companies can use this tool to self-assess against the harmonised requirements of the rental sector and to demonstrate fulfilment of these requirements.

Darren Fitch from Volvo CE said, "Sustainability is an important part of the success of Volvo CE. As a company that is committed to developing, producing and distributing products in a sustainable and responsible manner, we welcome this initiative by ERA. We hope that this Framework can both raise the standards of sustainability across the rental supply chain and benefit suppliers like us by defining common standards for supplier assessments."

Are you using the Framework?

We encourage rental companies to inform the ERA if and how they use the Framework. The ERA would also welcome information from suppliers once they declare adherence to the framework on their websites.

For more information about the Sustainable Supplier Framework and to download the relevant documents, visit the ERA website or contact the ERA Secretariat: era@erarental.org. **IRN**

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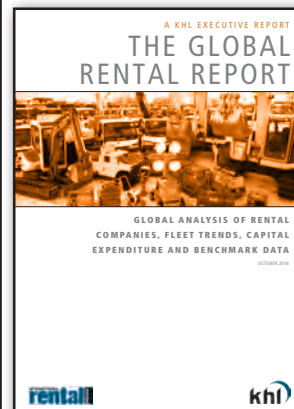
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