

INTERNATIONAL rental

NEWS

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Volume 17 Issue 5 June 2017

TOP 100

Ranking the world's top 100 rental companies

p30



INSIDE: EUROPEAN RENTAL AWARD WINNERS; XPRESS RENT INTERVIEW; ACCESS

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The fun never stops

The most intriguing thing about the IRN100 was realising the sheer size of rental companies around the world. Whether it was massive turnovers, large investments, or hundreds of depots spanning various countries, the rental industry is big, make no mistake about that.

Revenues of over €41 billion were recorded by the top 100 rental companies in the world, meaning that the €40 billion mark had been breached for the very first time.

To think that United Rentals alone makes up 12% of that figure is quite astonishing. The company continues to grow, too, through recent acquisitions – namely that of NES Rentals for a cool US\$965 million (€861.50 million) in cash. This will further enhance the company's stature at the summit of the table next year, assuming no miracles happen elsewhere, of course.

IRN's exclusive round-up of the top 100 rental companies can be read from page 30 onwards. You might want to get the popcorn ready while you're at it.

Another way of recognising the size of the industry is by attending rental-specific exhibitions and conventions, which brings me onto the International Rental Exhibition (IRE). Held last month in Amsterdam, the Netherlands, the show provided the perfect platform for manufacturers and rental figureheads to mingle and do business.

With over 65 exhibitors covering a range of equipment, tools and software, the RAI Centre was home to some of the most innovative rental products available to the worldwide market. Read all about the exhibition on page 24.

Alongside the IRE show was the European Rental Association's (ERA) Convention. Both events took place between 2 and 4 May and were well received by its attendees.

The European Rental Awards were also held at the RAI Centre, on 3 May, which saw nine accolades collected by various companies and individuals. Zeppelin Rental won two of these – Large Rental Company of the Year (revenues more than €15 million) and the Digital Innovation Award – while Trime's CEO Ray Caulfield scooped the Lifetime Achievement Award, following 52 years of service in the industry to date. There wasn't a dry eye in the house.

A full round-up of the awards can be seen on page 28.

Over the course of the month I spoke to Sophie Hulin, managing director of Xpress Rent – a new online equipment rental platform for the French rental market. Ms Hulin spoke about the company's beginning, and its potential for the future. You can read the interview on page 13.

Finally, I visited Morris Site Machinery on home soil and spoke to Phil Winnington, the company's international business director, about its innovation over the last seven years (interview on page 55). During the factory visit I fitted an engine into one of its lighting towers in production – sorry to whichever company ends up with that one (there may be an adjusted warranty programme)...

I hope you all enjoy digesting the IRN100, and also taking in some light reading with this month's features – access equipment and lighting towers.

Until next time.

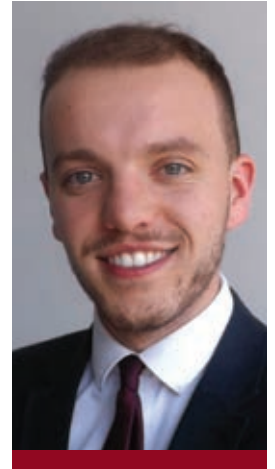
Joe Malone

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International Rental News



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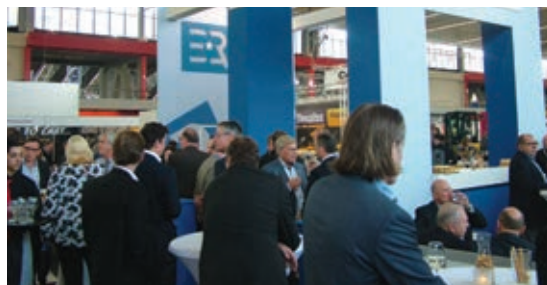
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Phil Winnington, international business director, talks about the company's product expansion over the last seven years and its new App.



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Turn to page 30 to see our exclusive listing of the top 100 rental companies in the world.



DIARY DATES

2017

EUROPLATFORM

Sept 14, 2017
Warsaw, Poland
www.europlatform.info

BICES 2017

Sept 20-23, 2017
Beijing, China
www.e-bices.org

INTERNATIONAL RENTAL CONFERENCE (IRC)

October 31, Shanghai, China
www.khl.com/irc

APEX ASIA 2017

Oct 31 - Nov 3, 2017
Shanghai, China
www.apexasiashow.com

CEMAT ASIA

Oct 31 - Nov 3, 2017
Shanghai, China
www.cemat-asia.com

EXCON 2017

Dec 12-16, 2017
Bengaluru, Karnataka, India
www.excon.in

HIGHLIGHTS

■ Equipment manufacturer Atlas Copco has opened a new headquarters for its speciality rental business in Boom, Belgium. The brand new building will also serve as the main competence centre for Atlas Copco's rental business in the region, supporting its network of 50 depots and customers across Europe. The facility has cost 5 million and 80 Atlas Copco employees will be based there.

■ Boels Rental has fully acquired IQ-Pass, a Netherlands-based company that specialises in technology to manage crowds and control worker access to industrial, construction and maritime sites. The price was not disclosed. IQ-Pass was founded in 2008 in Breukelem (between Amsterdam and Utrecht) and has customers in the Benelux countries and Germany.

■ KHL.com is being completely overhauled and will be re-launched on July 1. Using the latest technology the new KHL.com will display more content in a new layout designed for a wide range of devices from smart phone to tablets to traditional PC and laptops. The new website will bring together a wealth of knowledge world generated by the team of industry experts.



Wirtgen's range includes the Hamm HD138 tandem roller

John Deere acquires Wirtgen Group

US equipment manufacturer John Deere is to acquire the Wirtgen Group for an estimated US\$5.2 billion (€4.6 billion).

Headquartered in Germany, the Wirtgen Group claims to be the global leader in the manufacture of road construction equipment. The group boasts five premium brands – Wirtgen, Vögele, Hamm, Kleemann and Benninghoven – spanning milling, processing, mixing, paving, compaction and rehabilitation operations.

Samuel R Allen, Deere & Company chairman and chief executive officer, said, "The acquisition of the Wirtgen Group aligns with our long-term strategy to expand in both of John Deere's global growth businesses of agriculture and construction."

He added, "Wirtgen's superb reputation, strong customer

relationships and demonstrated financial performance are attractive as we expand the reach of John Deere construction equipment to more customers, markets, and geographies."

The firm also confirmed that it planned to maintain the Wirtgen Group's existing brands, management, manufacturing footprint, employees and distribution network.

Wirtgen Group co-managing partner Stefan Wirtgen said the group has a "legacy of technology and innovation with market-leading products and a strong focus on the customer".

He said, "As we looked to the future, we specifically chose Deere as the buyer because of our long-held respect for the organisation and our full confidence that Deere is dedicated to the ongoing success of the Wirtgen Group."

Australian changes

A new legislation has been passed in Australia's hire industry, which sees the Personal Property Securities Act 2009 (PPSA) only implemented for leases of more than two years.

Since the beginning of the Act in 2009, it has been reported that hundreds of millions of dollars of equipment has been seized and lost when renters' customers have become insolvent.

Australia's Hire and Rental Industry Association Limited (HRIA) has called the passing of the new legislation a win for common sense, after insisting that rental companies had been tied up in red tape since its implementation in 2012.

Under the new Act, The PPSA has been amended so hires will only fall into the PPS lease definition when:

- The agreed term of the hire and any options actually exceeds two years; or
- The hire actually extends for more than two years. The two-year threshold replaces the current one year period in the current PPSA.

HRIA CEO, James Oxenham, said, "The changes to the Act will significantly cut down the scope of the PPS lease definition and greatly reduce the number of hires that can be deemed to be PPSA security interests."

Changes to the Act were officially implemented on 20 May.

HIGHLIGHTS

■ One of the first equipment rental companies in Georgia – Georent – has ambitions to develop the local rental market for light equipment and longer term to enter the adjacent markets of Armenia and Azerbaijan. Roin Gigiberia, co-owner and founder of the company, which is headquartered in Tbilisi, told *IRN* that since its creation in 2010 Georent has been working to develop a rental culture in Georgia, something that hasn't been easy.

■ Finnish rental company Cramo began its four-year Shape & Share strategy with a positive first quarter to 2017, recording a year-on-year revenues increase of 4.8% to €162.9 million. The company's earnings before interest, taxes and amortization (EBITA) was €19.7 million – an increase of 52% year-on-year.

Ray Caulfield, Group CEO of Trime, was presented with the Lifetime Achievement Award during the European Rental Awards dinner – jointly organised by *IRN* and ERA. Read page 23 for more.

Ray Caulfield (centre) collecting his award alongside Nadine Dereza, host (left), and Pierre Boels, ERA president (right).



HIGHLIGHTS

■ A strategic alliance between Canada-based industrial auctioneer Ritchie Brothers and US-based construction equipment manufacturer Caterpillar has been launched, following Ritchie Bros' recent acquisition of IronPlanet – an online marketplace for heavy equipment and other durable assets. With an initial five-year term, the alliance will make Ritchie Bros the preferred global partner for Caterpillar.

■ Russian distributor Vertex has invested in JLG booms, valued at more than €20 million. The deal was signed at the APEX exhibition on 2 May, in Amsterdam, the Netherlands. Models include JLG ultrabooms, telescopic booms and articulating boom lifts. Vertex is the national distributor of JLG products in Russia.



Karel Huijser (left), general manager and vice president JLG EMEA with Dimitri Pankin, managing director of Vertex, at APEX.

■ The International Rental Exhibition (IRE) attracted a record number of delegates at its latest show – 1600 – compared to 1035 three years ago, representing an increase of 54.5%. Read the review from the show on page 23.

■ The European Rental Association (ERA) and its consultant IHS Markit have predicted a rise from 0.9% to 1.2% for European rental market growth this year, while the forecast for 2018 is up 0.5% to 3.5%.



Kiloutou boosts the young

French rental company Kiloutou has given five young people the chance to train as maintenance technicians, leading to a twelve-month professional training course at the Institute Nicolas Barré d'Armentières.

The company offered its five students a three-month employment scheme, where they learnt on the job, and gained the relevant qualifications and experience in order to study at the college, which specialises in technical professions.

Kiloutou launched the scheme in

2013 and has since welcomed nearly 30 young people to its company. Its scheme offers over 720 hours of on-the-job training and about 1000 hours on-site under the guidance of a tutor.

The students obtain a level 4

qualification, enabling them to study at the college.

Carine Vermeersch, head of Kiloutou, said, "Our qualifying school compensates for the lack of technicians able to intervene on the many families of materials we have."



JCB's new 16C-1 mini excavator.

JCB revealed three new mini excavators, a 15-tonne reduced tail swing excavator and a revolutionary concept site dumper at an exclusive launch at its headquarters in Staffordshire, UK.

Sunbelt acquires Noble assets

Noble Rents has sold its Los Angeles assets to Sunbelt Rentals for US\$46.34 million (€41.44 million). The specific assets include all of Noble's rental equipment fleet, vehicles, inventory, accounts receivable and other property used in the business.

Noble Rents is owned by Noble Iron. The purchase does not involve Noble Iron's software subsidiary, Texada Software, or the company's intellectual property, trademarks and assets held separately from Noble Iron's LA subsidiary.

Following the transaction, Noble Iron will continue to operate in the construction and industrial equipment sector through its software services, and plans to expand further through other potential strategic ventures.

IRC programme confirmed

The full line-up for the 5th International Rental Conference (IRC) in Shanghai, China, has been confirmed and can be viewed at www.khl.com/irc

Speakers include senior managers at rental companies and OEMs from the US, Japan, Europe and China. Some of those involved are: Kevin Appleton (senior executive & rental consultant), Marco Arndt (CEO, Sycor Asia), Tetsuo Kanamoto (president & CEO, Kanamoto), Liu Jiansen (vice president, XCMG & general manager, XCMG Import and Export Co Ltd) and Peter Schrandt (managing director, Zeppelin Rental).

The conference, which is organised *International Rental News (IRN)*, will take place at the Shanghai New International Expo Centre (SNIEC) on 31 October, 2017, on the first day of the new APEX Asia exhibition which runs from 31 October to 3 November.

IRN Rental Share Index

COMPANY	SHARE PRICES				
	Start date	Previous mth	Current mth	% change	
	07/01/06	19/04/17	12/06/17		
Acces Industrie (France)	€	0.47	5.28	8.81	+66.80%
Aggreko (UK)	£	2.75	8.60	8.75	+1.74%
Ashtead Group (UK/US)	UK£	1.83	16.10	16.43	+2.04%
Boom Logistics (Australia)	A\$	3.70	0.12	0.10	-16.66%
Cramo (Fin)	€	13.0	22.16	22.16	0.00%
GAM SA (Spain)	€	8.00	0.34	0.34	0.00%
GL events (France)	€	29.96	20.28	26.45	+30.42%
H&E Equipment	US\$	–	23.39	19.72	-15.60%
Kanamoto	Yen	–	2871	3585	+24.80%
Lavendon (UK)	UK£	2.20	2.70	2.69	-0.37%
Mobile Mini (US)	US\$	46.2	28.80	29.20	+1.38%
Ramirent (Finland)	€	23.43	7.65	9.13	+19.34%
Speedy Hire (UK)	UK£	8.32	0.53	0.54	+1.88%
United Rentals (US)	US\$	24.9	121.76	110.20	-9.49%
IRN INDEX		100.0	332.90	318.33	-4.4%

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

News from khl.com

MANUFACTURERS

■ Caterpillar has revised its financial outlook upwards after recording higher year-on-year quarterly sales for the first time since 2014. The latest figures, together with what Caterpillar describes as "outstanding operational performance" during the quarter, led the company to project an end of year total between US\$38 (€33.98) and US\$41 billion (€36.67 billion). This is \$2 million (€1.78 million) higher than its previous outlook figure. The company's first quarter figures showed sales and revenues of US\$9.82 billion (€8.75 billion) – more than \$350 million (€312 million) above the corresponding three months in 2016.

■ Hitachi is to buy compressor manufacturer Sullair from Accudyne Industries for US\$1.245 billion (€1.11 billion). The deal gives Hitachi portable compressors as well as a much strong presence in North America. Sullair will become part of Hitachi's Industrial Products Business Unit. Its product range is dominated by stationary compressors used in industrial applications, while around 20% of Sullair's business is for portable units.

■ Chinese manufacturer XCMG said its export sales had doubled in the first four months of 2017, year-on-year, with business increasing in Asian markets, the Middle East and Africa. Mr Liu Jiansen, vice president, XCMG, and general manager of XCMG's import and export division, said the increase in sales was partly linked to the One Belt, One Road initiative, which is focused on infrastructure and transport projects in Asia and East Africa.

RENTAL ROUND-UP

■ The UK's VP plc has reported a record year for revenues and profits, with sales up 19% to £248.7 million (€283.10 million) and profits before tax and amortisation increasing 17% to £34.9 million (€39.73 million). All of the company's four UK divisions – Hire Station, Groundforce/TPA, UK Forks and Torrent Trackside – reported good levels of demand from their customers, with sales up 17% at £220 million (€250.43 million). The results are for the year to 31 March 2017.

■ UK-based rental company HSS Hire has recorded a drop in its first-quarter revenues for 2017, and announced it has appointed a new CEO. Its revenues in the first quarter fell 4.9% year-on-year, to £80.2 million (€92.73 million). HSS said, however, that the company performed in line with its expectations and added that branch closures played a part in its year-on-year decrease. Meanwhile, Steve Ashmore has been appointed as the company's new CEO and will begin his role on June 1 this year.

■ Brazil-based Mills Estruturas e Serviços de Engenharia has continued its struggle in the first quarter of 2017, revealing a year-on-year decrease of 49.2% in its revenues to R\$66.1 million (€19.20 million). The company said the performance of the first quarter was impacted by the low level of economic activity, mainly in infrastructure in Brazil. The company's EBITDA fell 156%, resulting in a loss of €4.71.

■ Major rental companies Ramirent and Zeppelin Rental have agreed a collaboration which will see the former rent its temporary space modules to the Germany-based company which, in turn, will re-rent to end customers. Ramirent's temporary space modules are made of wood and compliment the range of space solutions offered by Zeppelin Rental, said Ramirent. Ramirent's temporary spaces are said to provide excellent insulation, energy efficiency and sound absorption.

■ Finning, the Canadian distributor for Caterpillar equipment, has announced revenues of US\$1.4 billion (€1.29 billion) for the first quarter of 2017, representing a year-on-year decrease of 6%. The company's earnings before interest, taxes, depreciation and amortization (EBITDA) was up 37% to US\$131 million (€120.55 million) for the quarter. The company said that Canada had achieved the highest profitability over the last six quarters, thanks to strong revenues.

■ Speedy Hire in the UK said it had completed its turnaround as it announced much improved financial results for the year to 31 March 2017. Revenues were up 12.2% to £369.4 million (€420.49 million) and pre-tax profits were £14.4 million (€16.39 million) compared to a £57.6 million (€65.57 million) loss in 2015. The company said it was now ready to pursue further growth either through acquisitions or organically.

MARKETS

■ The Italian construction equipment association, Unacea, has recorded a 6% growth in sales of Italian construction equipment in the first quarter of 2017, compared to the corresponding quarter in 2016. According to the figures, 2,094 units were sold in total, of which 2,005 were earthmoving machines and 89 were road machines. The greatest increase was seen in road machines, sales of which grew by 17%, while sales of earthmoving machines rose by 6% overall.

■ The Mechanical Engineering Industry Association (VDMA), based in Frankfurt, Germany, has reported that German manufacturers of building material plants are feeling positive about the year ahead, after a period of growth towards the end of 2016. After several years of decline, orders received in most subsectors had risen considerably at the end of 2016, compared with the previous year. In 2016, German manufacturers of building material plants were said to have recorded an 8% rise in sector sales compared with the previous year, totalling €4.7 billion.

■ A new report from Off-Highway Research looks in-depth for the first time at the mini excavator industry in India, which has been established in only the last few years. However, sales have grown over the last decade from 22 units in 2007 to a point where sales could reach 1,000 machines this year. There are now ten suppliers of mini excavators in India, three of which also manufacture such machines in the country.

Rental information from IRN

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New wave of UK rental investors

Kevin Appleton reviews the UK market and the attractiveness for investors upon entering.

In recent weeks we have seen the completion of Lavendon Group's acquisition by Loxam and, at the smaller end of the scale, the acquisition of Supply UK and its 25 tool and specialist hire centres across the UK. So does this represent some new wave of opportunity for would-be investors in the UK rental industry?

Let me offer some personal views on this. The UK remains Europe's largest equipment rental market and, in the main, has offered better financial returns for investors than most other European markets (with the Nordics being the only area that, structurally, has produced stronger average returns on capital over a twenty year period).

This, I suspect, is down to the UK market having been around for a rather long time and, consequently, possessing a fair spread of experienced management talent who understand the essentials of how to make money from rental.

Whilst Speedy and HSS have had well-covered financial challenges of their own in recent years, this would not be reflective of the wider market and is more likely to be down to execution issues than market structure.

However, another side to the UK is that it has a hugely competitive (and simply huge) financial sector, relative to the overall economy. The financial sector offers asset-backed lending, traditional debt lending and private equity structures of various types to UK companies. This, in turn, means that capital is relatively freely available to rental businesses and, as a consequence, there is a tendency for the market to go through periods of overheating as more new entrants come into the market and are able to source equipment at attractive rates, with relatively little collateral.

Deeply affected

The UK was one of the most deeply affected rental markets during the last financial crisis along with Spain (which has a similarly disproportionate scale of hungry financial investors) and this must surely have been influenced by the levels of unsecured leverage generally present in the UK rental sector and consequent oversupply.

Whilst this normalised in the years after 2008, I hear more recent anecdotes suggesting that the market is, once again, awash with finance and this is usually a precursor to some kind of market correction.

Of course, the other side of this is the current weakness of Sterling. If there are periods of correction it is incredibly helpful to be able to offload excess equipment to other markets, via auctions or traditional traders. With the Pound at its current level, older ex-UK equipment is very attractive for international traders and it could be that this route would provide a pressure release valve for any demand imbalances that occur in the next couple of years.

The other point to make is that Loxam's acquisition of Lavendon is only partly about the UK. It does give

Loxam a much larger and very stable, profitable position in the UK market, but it also gives a platform for expanding the broader Loxam offer into the lucrative Middle East market.

Furthermore it offers Loxam a depth of powered access management expertise across the Middle East and Western Europe, which is probably superior to its own and, if organisationally exploited, offers the possibility of bringing returns levels from the Loxam legacy fleet up to the levels historically achieved by Lavendon. If it is able to pull off both of these opportunities (and it's a big if) then its investment will look to have been very successful.

So the UK is not a bad place to do business. It has a pretty solid and resilient rental market, although it does suffer from financial overheating on a periodic basis. It is likely, in my view, that the Brexit process, along with a weaker Pound, will have some dampening effect on construction demand in the near term.

However, neither Boels nor Loxam are making these investments for the near term. In that respect they probably have a natural advantage in the market, as UK companies have tended to be more short-term-minded in nature, sometimes looking more at where they are likely to be able to sell their business, rather than building a business for future generations. For any business determined to stick around and do the right things, there is money to be made. **IRN**



KEVIN APPLETON is former CEO of Lavendon Group and former divisional chairman of Travis Perkins. He is currently managing director of Yusen Logistics UK, non-executive chairman of Horizon Platforms, non-executive director at Ramirent Oyj, non-executive director at Arco Ltd, and non-executive director of the Freight Transport Association. To comment on these articles please email: IRNfeedback@khl.com

“ So the UK is not a bad place to do business. It has a pretty solid and resilient rental market, although it does suffer from financial overheating on a periodic basis. ”

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Digital experience is the key

A new online marketplace, where renters can actively manage the contract throughout, has surfaced in France. Joe Malone caught up with its managing director, Sophie Hulin, about its beginning and its future.

Let your mind drift back to the 20th century, and imagine all the things you hoped you'd be able to do one day, as a result of advanced technology.

Whether it's visually interacting with people, without being in the same room as them, or studying, in depth, your next holiday destination before arriving there, technology has allowed people to do almost anything, without having to break a sweat.

One of the latest technological trends in the rental industry is online marketplaces, allowing prospective equipment renters to specifically choose the machine they require, and triggering a rental contract via the online platform.

New player

A new player to this sector has entered the market in France, known as Xpress Rent. Headed up by Sophie Hulin, a long-time employee of Caterpillar distributor Bergerat Monnoyeur, the company has overseen a successful year of piloting, and launched at the start of 2017.

A new subsidiary of Groupe Monnoyeur, the company is said to have total independence, according to Ms Hulin, the managing director.

"We are part of the of the rental development of Groupe Monnoyeur, and we have great support from them. We have a chance to be successful, having their backing, but we're also very individual and we're very much a start-up and have been allowed to do things completely our own way – making it our own way," she said.

"It was important to me that we started this platform from scratch, rather than buying a product that was already live and adapting it. We could have adopted something from Caterpillar, as I knew it all very well, but we want to make sure our customers understood that it was totally independent and unique, so it was to avoid confusion, more than anything."

Ms Hulin had worked for Bergerat Monnoyeur for

20 years, spending the last eight years working for its rental platforms such as the Cat Rental Store.

"I had this vision of what a rental operation was and thought about all the issues a rental company faces during the process of renting. That's where Xpress Rent comes in."

Perfect match

So how does it work? Well, Xpress Rent works with rental companies and offers them a chance to market their equipment on its website and App. A prospective renter will then use Xpress Rent, and use the search engine to filter their requirements – such as the type of equipment, its location of use and the start and end dates they require it. Xpress Rent will then produce a list of equipment available, matching the renters needs, and offer them the chance to add items to their basket.

Once the renter has chosen their equipment, they can view their basket of goods and make the transaction online, using a debit or credit card. It is then up to the rental company which owns the machine to organise delivery from its depot.

However, Xpress Rent doesn't stop there. In fact, the online platform acts as a tool to manage the

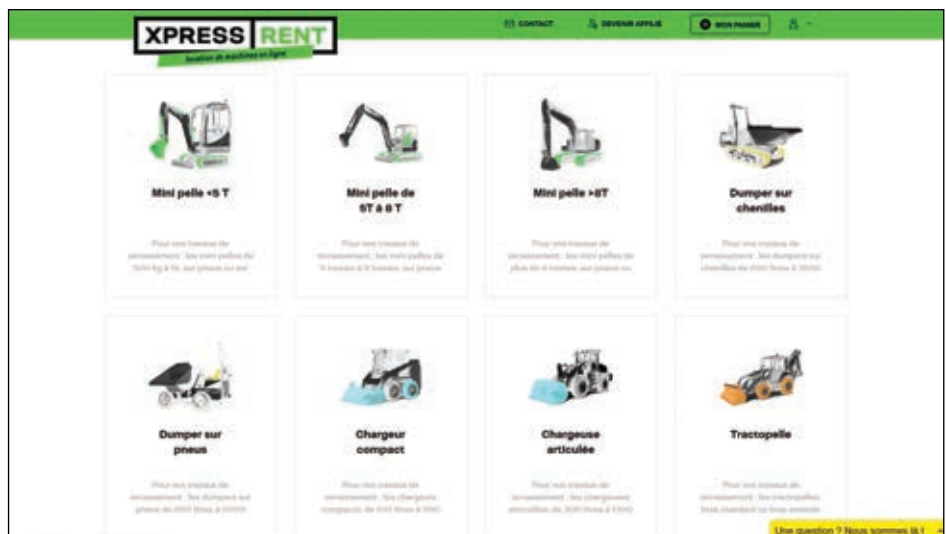


Sophie Hulin, managing director, Xpress Rent.

contract from start to finish – a tool which Ms Hulin believes is essential to the renter.

"We wanted to make sure that the digital experience wasn't just about a person renting equipment from our site, but being able to have a profile where they can manage the entire contract. We send all the official papers for the equipment, which can be viewed on the browser, and we produce invoices for all the related costs breaking down the damages costs and so on.

"The renter can also edit the contract length, so if they no longer require the machine, they can



Xpress Rent offers a range of equipment and brands to suit the needs of the customer.



Xpress Rent offers a whole host of Bomag rollers.

organise for it to be taken away earlier than agreed, or vice versa if they need it for longer, they can add more days."

She added that Xpress Rent allowed renters to manage the contract on a daily basis, without having to speak to the rental company it acquired it from over the phone, with no visual aids.

The company makes its money by adding a transaction and contract management fee.

Ms Hulin said that the goal of the company was to provide customers with the best digital experience, making it as simple but efficient as possible. She added that it was important the company didn't go down the route of using one brand of equipment, but offering a wide range of choice.

"We have no link with Caterpillar, or no discussions about specific machine types. The idea is just about providing a digital platform. It also helps clients look at statistics and decide what the best machine is for them to use, so that hopefully they won't be disappointed with their choice, as they can take an educated view."

Range of equipment

Xpress Rent markets a range of earthmoving equipment, such as mini excavators, wheeled loaders and dump trucks. It also offers compaction equipment, such as vibrating plates, rammers and single drum rollers, as well as landscaping materials, such as augers.

Suppose a renter wanted a specific sized mini excavator, the online platform offers a filter to choose machines below 5 tonnes, between 5 to 8 tonnes or anything above 8 tonnes.

The company operates in France only, but is yet to cover the entire country. Its key regions are Nancy, Paris, Lyon and Dijon.

However, Ms Hulin said the company would look to expand its offerings in the future.

She said, "We've started in a small way, from scratch, so we're taking our time and making sure we build something strong, before reaching out to further places.

"One day we hope to offer our services to the whole country. Beyond France? We shall see."

For a company fresh into the market, the

experience of its managing director in the rental industry, and the financial backing of its parent company, Group Monnoyeur, provides Xpress Rent with all the tools to succeed. However, the digital world gets more competitive each year and, for the company to see success, it must continue to offer more than its direct competitors, in order to be the preferred choice for customers. **IRN**

Xpress Rent operations

Xpress Rent currently has 20 employees and operates a small office environment. Part of its team includes company development officers, who speak to French rental companies to promote the brand and offer its services. It also includes web developers and a customer services team.

Sophie Hulin, managing director, Xpress Rent, said, "In France, we have people working the customer experience, to ensure the platform is giving customers and rental companies what they want.

"Our customer service is very important because we know that a lot of people in the rental equipment industry aren't that comfortable with the web and working digitally, so it's important that, at any time, we have someone available to help out.

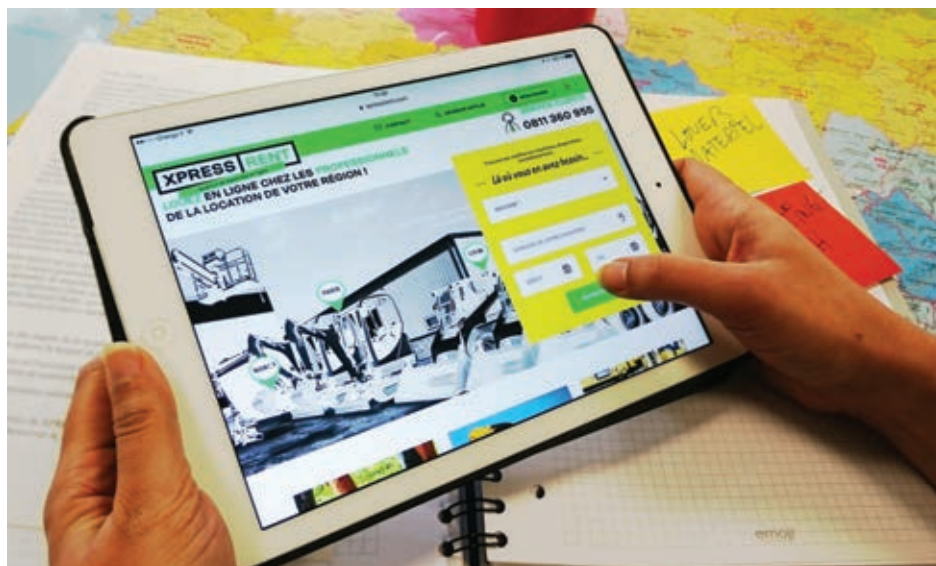
"Our customer service team works from 6am till 11pm. We try to be very open."

The company also has a marketing team that works on the digital side of the brand, ensuring the company is visible to everyone. Ms Hulin said she understood that social media was another way of promoting the business.

"We're just a small start-up company, which went live in February, but we're happy with how it's started so far," she said.



Xpress Rent markets a range of earthmoving equipment on its platform.



Xpress Rent is mobile and tablet optimised, so its customers can manage their contracts on the move.

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With the access industry ever-growing, Euan Youdale, editor of sister magazine *Access International*, reviews the latest news and launches.

It has been an eventful year so far in the powered access sector, with an abundant supply of mergers, acquisitions and new players.

It kicked off in January with the announcement by JCB that it was entering the access market with no less than 27 planned product launches this year.

The new range of scissor lifts and self-propelled booms is essentially designed to cover 80% of a typical access rental company's needs. The other 20% includes lower volume, niche products that JCB said it was not set up to produce, at least in the foreseeable future.

JCB Access managing director Richard Butler said, "It was a logical extension. We had been busy growing our product range over the years in the construction and agriculture sectors, but the noise escalated – the number of customers who said, 'you should be in this sector because it has so many synergies with products you already supply'. It was a no-brainer in reality, and we set about it."

The first batch of platforms consisted of nine electric scissors from 4.6m to 13.8m platform height, launched in February. Five articulating booms – four diesel and one electric – from 14.9m to 24.6m platform height are the next in line, with a further 10 diesel telescopic booms from 20.6m to 41.6m on the schedule for this year.

The first of the booms launched was the AJ50D is a 15.24m articulating boom with a 226.8kg platform capacity. The unit weighs around 7 tonnes and has standard oscillating axles. The machine is powered by a Tier 4 Final JCB Diesel by Kohler engine, as are the remaining articulated and all telescopic platforms that will be launched later this year.

Slab scissors are the core product in any mainline access rental company's fleet, along with self



New frontiers



The extra capacity through a larger working envelope is a key feature of Genie's XC range.

propelled booms, and to compete on a global scale, a company needs to have the means to produce in large volumes and follow that up with round-the-clock aftersales support.

New kid on the block

With this challenge in mind, GMG, another new access manufacturer, with a unique manufacturing philosophy, launched into the industry in May.

GMG is headed up by CEO Jim Tolle, who was formerly international development manager at US-based MEC Aerial Platforms. GMG is based in the US too, but plans to strike up partnerships with different manufacturers around the world for each product type, depending on their experience and suitability.

So far the manufacturer has an arrangement with an undisclosed partner in China, which has produced seven slab scissors closely monitored and designed by GMG. They include 3m to 14m working height models. All self-propelled models come equipped with direct electric drive for quiet operation and extended duty cycles.

"All products are equipped with the latest innovations and designs," said Mr Tolle. "The slabs are direct electric-driven. We will not go with hydraulic driven machines – it is just outdated, it's inefficient and you don't get the duty cycle out of a hydraulic machine that you do with direct electric."

Product support and low pricing are also a priority. Mr Tolle said, "To achieve those targets, the manufacturing just cannot be done in North America. It's impossible, mainly due to the pricing."

Both GMG and JCB, with its huge international

JCB Access' AJ50D is the first boom to be launched by the manufacturer's new access division.



The HA28 RTG Pro incorporates Haulotte's latest control and safety innovations.

distributor base, hope to help shake up the access industry.

Mr Tolle's former employer, MEC, has also become part of the slab scissor mix. To mark 40 years in the business it was showing its new line of slab scissors at this year's ConExpo show in Las Vegas, US.

The DC drive slab scissor line provides six machines from the company's 3.96m micro slab 1330SE to the 13.72m compact slab scissor – the 4555SE. It also features MEC's compact 4046SE, and the series of 5.79m, 7.92m and 10.06m scissors with standard integrated material sheet trays.

The slabs are a departure from its longstanding heavy-duty niche products, which are still very much part of its portfolio. However, like GMG

and JCB, MEC has big ambitions for Europe with its traditional products and new line of high volume scissors.

New generation

Snorkel, a longstanding mainline access equipment manufacturer, was launching its new generation of slab scissors at ConExpo too, represented by the first prototype in the series. The S3019E can lift up to 227kg to a platform height of up to 19 ft (5.79m), and weighs in at 1451kg. Snorkel has been making substantial gains in the market since the Ahern family of companies bought a 51% share in the company from Tanfield in 2013 and invested heavily in its production capabilities and product development. This new line of scissors coincides with its reestablishment as a serious contender.

Another company making serious inroads is Dingli. The manufacturer is based in China and produces its products there but has signed an important partnership with Italian-based telehandler specialist Magni, which has designed Dingli's latest self-propelled boom products.

While Magni specialises in telehandlers, it is also distributor for Dingli scissors across most of Europe and will follow suit with the new boom range once they emerge in the continent early next year.

The arrangement started when Dingli bought 20% of Magni last year, with one of the main aims being an R&D (research and development) centre in Europe, using European expertise.

Magni announced at APEX, the international access platform exhibition, during May that it had a three-year deal to supply 4500 scissors produced by Dingli to rental major Colle Rental & Sales over the next three years. Company director Eugenio Magni said, "Once a company like Colle pushes forward with a brand in a country, the other companies in that country tend to follow."

Apart from an inadequate service delivery, Chinese manufacturers have struggled in Europe and North America previously as a result of a perceived lack

**XCMG's new access division Xuzou
Firefighting and Safety Equipment launched
its first equipment at Bauma China.**



**Skyjack's 27.9m
working height SJ85
AJ was launched at the
beginning of this year.**

of product quality. The recent success in Europe of Dingli – also China's biggest AWP manufacturer – has proved that strategic partnerships can make a big difference.

Bid for growth

Other Chinese manufacturers are making a bid for growth in these regions too. There were eight Chinese producers at APEX, more than at any other edition of the show. They included now well-established companies, Dingli, Mantall, Sinoboom, Siveg and Runshare, which had all exhibited at APEX before.

Lin Gong Machinery Group (LGMG) represents a



Sany scissors launched at Bauma China.

new company on the scene and exhibited at APEX for the first time, showing a range of its new scissor lifts, first launched at Bauma China. In total, it offers 16 scissor lift models and booms.

The company already produces a range of construction equipment and believes access equipment offers great potential in the country and worldwide, so much so that it expects to be producing 10000 units annually, mainly scissors, within the next five years.

LGMG's launch into access coincides with a number of other Chinese construction equipment manufacturers doing the same thing, including XCMG, Sany and LiuGong. XCMG and Sany both presented their first ranges of scissors and booms at Bauma China. XCMG's new division Xuzou Firefighting and Safety Equipment introduced three 6m, 10m and 12m working height scissors and three telescopic booms with 22m, 26m and 30m working heights, plus a pair of 14m telescopic models, with and without jib.

Sany has got in on the act through its existing partnership with Palfinger, based in Austria. It has led to two product lines; scissors and truck mounts. The truck mounts are using technology and original designs from the Palfinger group, which have been adjusted for the Chinese market. The models sit in the 14m – 28m working height range.

On the self propelled side, Sany is focusing on 6m to 12m working height scissors, with 8m and 10m models in between. The output will be extended to include self propelled booms this year for use primarily in China.

Global outlook

While many manufacturers see the advantage of creating partnerships with local companies in the countries they are targeting, there is a swing towards a more global outlook when it comes to product design. This is certainly true when it comes to the big four producers – JLG, Genie, Skyjack and Haulotte.

And as for JCB, which has aspirations to join the >

Expanding range from Manitou

Telehandler specialist Manitou Group previewed its new telescopic boom, the 220 TJ at APEX, with the 22m unit supplementing the company's current 26m and 28m offerings.

The unit will be offered in two versions – a light 220 TJ and a high-capacity 220 TJ+ which will have a basket fully rated at 350kg.

Francois Desbriere, head of product marketing management, said, "Dealers and rental companies have been asking for an extension of our boom line."

Both models are equipped with a 2m pendular arm that folds up, reducing the length of the machine when transported. The booms can also be slung, with four chains from a single point for easy lifting without extra tools or equipment. The 220TJ and 220TJ+ telescopic booms are both equipped with a 4-cylinder 26kW diesel engine coupled with a variable speed pump.

The booms are equipped with a system that automatically adjusts the power of the engine to what is needed, thereby reducing fuel consumption and total cost of ownership.

The 220 TJ at APEX.





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Dingli's GTBZ 20AE was the first boom shown from its new range which it designed with Magni.

top four, this was the starting point for all their new models.

"We have designed a global product," said Mr Butler. "What has probably helped us, is the [European] EN 280 standard and [US] ANSI standard are coming together. They won't be quite the same, but the standards will be very close."

Mr Butler was referring to the proposed US ANSI A92 and Canadian CSA B354, which demand greater integrated control of the machine, particularly when it comes to overload prevention.

"Our view is we build to the latest EN 280 standard, make sure we meet the new ANSI standard, so then if you look at the market – 50% being North America, 30% Europe – for 80% of the market we have a global product definition that we can sell."

The trend was also demonstrated by Genie at APEX. It displayed its new Xtra Capacity (XC) booms, adding to the range first introduced in the US during September last year.

The Xtra Capacity family complies with guidelines in the proposed ANSI and CSA standards, as well as the current European and Australian AS 1418.10 standards.

The XC models have been designed to provide greater capacity so that platforms will have a greater working envelope, and therefore outreach, before exceeding the ANSI requirements. They

can work with an unrestricted 300kg capacity throughout the work envelope, or a restricted 454kg capacity, while still leaving room for tools and jobsite materials.

New launch

Skyjack displayed its newest articulating boom, the 27.9m working height SJ85 AJ, for the first time in Europe during APEX. It is the largest of Skyjack's articulating booms and features all of the same design elements that made the SJ63 AJ a hit.

It is designed to provide the level up-and-over clearance now demanded by operators. The machine has a horizontal outreach of 17.07m, up-and-over clearance of 10.36m and dual capacity rating of 340/227kg with two to three people in the basket. It has an open centre knuckle riser design, which assists in the up-and-over capabilities.

Haulotte used APEX to show its HA28 RTG Pro for the first time in Europe. The boom was originally launched in November last year.

It was notable that Haulotte decided to concentrate on this model alone at APEX, with no other products on its stand. Caroline Doman, international product manager for Haulotte, said that the 28m working height machine summed up the manufacturer's most recent global innovations, and reflected how its products would look in years to come.

The company is also working on electric booms and may well have one on the market next year.

JLG Industries also showed its global products on its stand at APEX, although no brand new products.

Recent launches, though, have included its latest hybrid model, the H800AJ, which uses the design of its standard 800AJ articulating boom but with parallel hybrid technology, with a powerful electric motor/generator and a Tier 4 Final fuel efficient engine.

Together, the motor/generator and engine combination provide diesel-like performance. The machine can also run exclusively in electric mode through its battery pack located in the counterweight.

Niche news

Dinolift's new 28m working height 280RXT, launched at APEX, is an example of the kind of niche machines that are being seen in the market. It is a lightweight all-terrain aerial work platform with outriggers, designed for sites with weight restrictions or where all terrain and levelling capabilities are needed. The 280RXT has a new boom profile, enabling a better outreach with more basket capacity than before. Adding to the benefits is a significantly higher up-and-over capability and a fly-jib, with maximum outreach being 16m. Other features include an oscillating front axle, an automatic levelling capability of up to 10° and gradeability up to 40%.



Lightweight all terrain with outriggers.

Vice president of global marketing Alan Loux said, "With the ongoing development of aerial work platforms, we will see more innovative technologies becoming integrated in the aerial work platform industry. Aerial work platforms will definitely become smarter and stronger in the future."

An example of just that came from rental company Rival, based in the Netherlands, which had converted a 38m working height JLG 1200SJP telescopic boom from diesel to electric to coincide with APEX. It follows the conversion of a 26m boom to electric three years ago, and a 28m unit soon after, for which the diesel engine and the fuel tank were swapped for an electric engine, battery pack, charger and controls of the electric engine.

Named the JLG 1200SJP Electric by Rival, with a 23m horizontal outreach, it was designed to enable customers to work at a much greater height inside, with zero emissions, or in areas where restricted noise levels apply, such as residential areas.

The industry can expect to see more booms, offering combined power options and application possibilities, over the next couple of years. **IRN**



MEC has introduced an electric slab scissor series.



JLG concept self-levelling chassis automatically levels itself in a longitudinal and/or horizontal direction.

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Positivity in Amsterdam

Following a successful three days at the International Rental Exhibition (IRE), Joe Malone reviews the Amsterdam show.

The International Rental Exhibition (IRE) attracted a record number of delegates at its latest show – 1600 – compared to 1035 three years ago, representing an increase of 54.5%.

The IRE show was held alongside the European Rental Association's (ERA) annual Convention, at the RAI Centre in Amsterdam, the Netherlands, from 2-4 May. The 1600 delegates includes all ERA's visitors and exhibitor staff.

The general consensus was one of positivity at the show, which saw 65 exhibitors showcase new and existing products, aimed at the construction rental market.

There were over 70 brands of equipment on show, from exhibitors such as JCB, Ammann, Case Construction, Hitachi Construction Machinery (Europe), Atlas Copco Portable Energy, Volvo Construction Equipment, Wacker Neuson, Ditch Witch, Vermeer, Thwaites and Yanmar Construction Equipment Europe, among many more.

Speaking at ERA's Convention, ERA president Pierre Boels, said, "The show has overwhelmed our expectations, since the exhibition sold out much earlier than expected. We are very pleased to welcome over 60 exhibitors, including also first time exhibitors.

"Few events in Europe give the opportunity to the manufacturers and other suppliers of the rental business to meet with the European rental business



As well as its new access equipment, JCB also had a range of construction equipment on show, including its 412-1 mini excavator.

The European Rental Association held a drinks reception after the IRE show on its first day – a chance for companies to network.



experts, all at once."

The adjoining show APEX attracted 4650 delegates in total, including exhibitor staff, compared to 4400 in 2014. APEX delegates also had free access to IRE.

Quality over quantity

Meanwhile, exhibitors at IRE spoke of the quality of people at the show, insisting influential buyers and decision makers visited their stands throughout the three days.

Jesús Martínez, commercial manager, AEM, said, "The show has been good for us. We have not had a flood of people, but we've had good people come here. It is better to have one good person than 100 not so good. We have made some leads."

The Spanish manufacturer of lighting towers showcased its recently-launched Rental SuperSilence 2.0 generator at the show – a product which claims up to 45% less acoustic contamination, compared to its other models from its rental range.

JCB proved to be a major attraction at the show, following its launch into the access market. And, Phil Graysmark, sales director, JCB Access, said, "Obviously there's been an attraction at our stand because of our new access equipment.

"We've had a lot of people on the stand and a lot of potential customers. It's a shame we couldn't bring all of our new access equipment really, but what we have brought seems to have gained some attention."



Spanish manufacturer AEM's Rental SuperSilence 2.0 generator claims up to 45% less acoustic contamination compared to its other models from its rental range.

He added that, overall, it had been a really good show for JCB, at the perfect time as far as its access launch was concerned.

On show for JCB was a range of its new access equipment, as well as its construction equipment. It showcased its S20-32E electric scissor lift, the smaller of its two new scissors launched in March.

From its construction equipment, it presented its 48Z-1 mini excavator, a product which is said to be targeted to the rental market.



TSR-Lighting showed its range of Worklite products, with different brands names of rental companies which have ordered models.



Tobroco-Giant said rental had become a "real push" for the company.

Its maximum dig depth is 3.5m and has a maximum dump height of 4m. The machine is just short of 4.8 tonnes.

One company which sought to surprise exhibitors at the show, with the launch of a new product, was TSR-Lighting. The company showcased, for the first time on the opening day of the show, its new product – Worklite.

The new product is an upgrade on its Worklite range, and is the first motion-sensor light it has manufactured, claiming energy savings of up to 70%. You can read more about the product in the lighting towers feature (page 51).

Ritelite (Systems) Limited, from the UK, also launched a new product at the show – a new MK2 version of its K50 and K65 mobile lighting towers.

New to the models are forklift pockets which, in addition to the existing lifting eye, increase versatility and speed of loading and unloading operations, says the company.

Kevin Thompson, export business development manager, told *IRN* that its product was for a specific market, claiming it would not compete with players such as Generac and Trime. "We're going for a particular type of lighting tower, one that is more focused on a point, rather than spreading light. We'll let the likes of Generac and Trime produce their sort of lighting towers, and we don't aim to compete with them – we're more interested in a particular client."

He added, "IRE is a show we wanted to be a part of to increase awareness of Ritelite and our products. We're very glad we participated and we hope we



Ritelite said its new MK2 version of its K50 and K65 mobile lighting towers was for the events industry.

get success from it. Although, it's always hard to tell during the show, but time will tell."

More improvements

Elsewhere, Tobroco-Giant showed its Giant D2635W X-TRA wheeled loader at the show. Compared to a standard model an X-TRA model has a lower front frame and thus a lower centre of gravity of the load in comparison with the machine. This results in a significantly higher tipping load varying between 460 and 1600kg of extra weight, the company said.

Evert van den Broek, marketing and

communications manager at Tobroco-Giant said the IRE show was a good event and helped get the message out to customers that it is focused heavily on rental.

He added, "It's a real push for us now, the rental market. We've got a base in the UK which is targeting that market, too, and shows like IRE mean we can put ourselves on the market."

"It's been a good show for us, and we're hoping any leads we've made will materialise."

Thwaites was another company which showcased its rental presence, with a range of its site dumpers sold to Boels Rental. The company's export regional sales manager, Remi Tourtet, said IRE was positive for Thwaites and provided the company with an opportunity to meet all the right people.

"We've obviously got dumpers here which are branded up as Boels Rental, which makes a statement of intent to both Boels itself and other big rental companies. We've seen some good people at the show and even if we just get a few leads from it, it's been worthwhile for us."

Caterpillar were also present at the show, and focused its attention on its Power Systems division, showcasing its RP4400 and RP3100 portable generators. The more powerful of the two – the RP4400 – has a maximum output of 4400W and has two wheels for easy portability.

Rental importance

US-based Vermeer displayed its BC190XL brush chipper at the show, which is said to have features that are of special importance to the rental industry. Indeed, the automatic clutch system, which works with a single push of a button, increases ease of operation for rental customers.

The outstanding serviceability of the machine is enhanced by the fact that it's equipped with an automatic belt-tensioning system, says Vermeer.

Jasper de Smit, Vermeer's solutions specialist, told *IRN* that IRE was an interesting test for the company, to measure the interest it generated from rental customers serving the construction industry.

He said, "We're obviously more into agriculture, but we do serve the construction industry. It's not

APEX hailed 'best ever'

APEX closed its doors for another three years, following its three-day run in Amsterdam, the Netherlands last week.

The show was hailed a resounding success by exhibitors, many of whom said it had been the best edition yet, with large numbers of high quality visitors on their stands.

Well over 100 companies were on show, representing an APEX record, with 4650 industry professionals attending the exhibition, compared to 4400 last year.

"We are very happy with the visitor numbers," said Michel Denis, president and chief executive officer of Manitou Group, reflecting on the first day, "We have had many customers on the stand."

APEX 2017 was organised by Industrial Promotions International BV (IPI) and is officially supported by the International Powered Access Federation (IPAF) and by *IRN's* sister title *Access International*.

APEX saw 4650 industry professionals attending the exhibition, compared to 4400 last year.



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HCME displayed its ZW75-6 compact wheeled loader at IRE.



Case Construction Equipment's CX26C is one of six models from its C series of mini excavators.

our main focus, but we think IRE is a good test for us to see whether rental companies for construction equipment are interested in our product.

"We obviously attended lots of shows over the last year, many related to agriculture, but this is a particularly interesting one for us."

Hitachi Construction Machinery (Europe) – HCME – displayed its ZW75-6 compact wheeled loader and ZX19-5 mini excavator at IRE. The company says that both machines are ideal for rental fleets, given their versatility.

The ZW75-6 is one of three compact wheeled loaders in the Hitachi line-up. It is easily transported between locations on a trailer and has an optional 30km/h travel speed.

Italian manufacturer Messersi was a late-comer at IRE, following Perkins' decision to pull out of exhibiting a few weeks beforehand. It showcased its mini tracked dumper – the TCH-R800FED. The 800kg payload dumper has an all-electric undercarriage with two battery groups connected to three inverters.

New range

Meanwhile, Case Construction Equipment presented its new range of C Series mini excavators at the show. The line-up included three of the six recently launched models: the CASE CX18C, CX26C and CX60C.

The company says the C Series mini excavators have been designed to meet the specific needs of

rental fleets, offering a wide range of advantages for this specific target group.

Germany's Wacker Neuson was out in force at IRE, showcasing a range of compaction equipment. It presented its two battery-powered rammers, a duel power excavator, an electric wheeled loader and an electrically-powered track dumper.

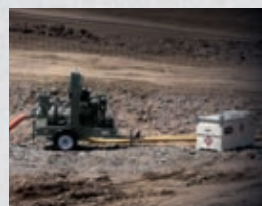
The company's electric track dumper – the DT10e – has a maximum payload of 1000kg and is designed for outdoor demolition work. Fully charged, the battery can run for up to eight hours.

Overall, the feedback was one of positivity from the IRE show, with many making their feelings clear about attending the show again in three years' time. **IRN**



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The European Rental Awards were held in Amsterdam, the Netherlands on 3 May.



Celebrating success

The winners of the European Rental Awards were announced during IRE and the ERA Convention in Amsterdam, the Netherlands.

The prestigious European Rental Awards took place on 3 May at the RAI Centre in the business district of Amsterdam, the Netherlands. The awards – which are jointly organised by *IRN* and the European Rental Association (ERA) – comprised of nine awards. *IRN* would like to thank all the companies and individuals that submitted entries to the awards.

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

WINNER:
Zeppelin

What the judges said:
"2016 was a stellar year for Zeppelin, with record revenues and profits and new initiatives everywhere you looked, from eCommerce and training to marketing, new products and rental IT systems such as telematics. Zeppelin Rentals fully deserves the Rental Company of the Year accolade."

SHORTLIST: Kiloutou, Zeppelin



From left: Martin Sebestyen (head of rental and fleet management, Zeppelin Rental), Michel Petitjean (ERA secretary general), Peter Schrader (managing director, Zeppelin Rental) and Christoph Afheldt (managing director, Zeppelin Streif Baulogistik).

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

WINNER:
Gomez Oviedo

What the judges said:
"Gomez Oviedo responded bravely to the Spanish recession and has proven to be energetic and innovative business: a small company that acts like a big one."

SHORTLIST: Gomez Oviedo, Huurland, Maltech, Mol Lifting



The Gomez Oviedo team picks up its award for Small Rental Company of the Year, presented by JLG's Karel Huijser (right).



Rental Product of the Year

WINNER:
Genie's Z-60/37FE boom

What the judges said:
"This is a true four-by-four hybrid machine designed for indoor and outdoor use and with low fuel consumption."

SHORTLIST: Atlas Copco (8 Series compressor), Genie (Z-60/37FE boom), Kaeser (M50E compressor), Mtools-Makinex (Hose 2 Go), Ramirent (Ramiflex module), Trime (X-ECO lighting tower)



The Genie team in force collects its award for Rental Product of the Year.

Digital innovation award

WINNER:
Zeppelin Rental

What the judges said:
"Having a digital strategy is a must for any business today, and Zeppelin Rental is clearly ahead of the game, with a well thought through programme addressing both its own needs and those of its customers."

SHORTLIST: Germans Homs, HSS, Ramirent, Zeppelin Rental

Murray Pollok, *IRN* Managing Editor, presents Peter Schrader, Managing Director, Zeppelin Rental, with the Employer Innovation Award.



Employer innovation award

WINNER:
Kiloutou

What the judges said:
"From its share ownership scheme to its staff induction programme, Kiloutou has shown that it has put its workforce at the very centre of its business. A textbook example of putting words into action."

SHORTLIST: A-Plant, HSS, Kiloutou



Xavier du Boys, CEO, Kiloutou, picks up the company's Employer Innovation Award.

Rental safety award

WINNER:
A-Plant

What the judges said:
"A-Plant is one of the rental companies in Europe that has a long-term track record of taking safety seriously, and its activities last year reinforced this commitment."

SHORTLIST: A-Plant, Groundforce, Mtools-Makinex (hand truck)

Asif Latief, Marketing Director, A-Plant (left) with Gerhard Gasser (Global Rental Business Manager, Hilti, and one of this year's judges).



Rental person of the year

WINNER:
Gerard Déprez, CEO, Loxam

What the judges said:
"The last 12 months has seen his company's annual revenues exceed 1 billion Euros – a moment that seals its status as Europe's biggest general rental player. Under his leadership Loxam has made some bold and successful moves, including the recent acquisition of Lavendon Group. Mr Deprez has enjoyed an illustrious career in the rental business – not least as the first president of the ERA – but even in that career 2016/17 will stand out."



Gerard Déprez, CEO, Loxam, collects the Rental Person of the Year award from Pierre Boels, CEO, Boels Rental and Nadine Dereza.

Lifetime Achievement Award

WINNER:
Ray Caulfield, CEO, Trime

What the judges said:
"Ray Caulfield is a true veteran of the equipment rental industry, with a career spanning 52 years. In that time he has played a significant part in many aspects of rental – product development, rental sales training, the creation of environmentally friendly products. Just as important, our winner has always conducted himself with good humour and humility."



Ray Caulfield, CEO, Trime, is given the Lifetime Achievement Award by Pierre Boels, CEO Boels Rental, and Nadine Dereza.

Special Recognition Award for a Manufacturer

WINNER:
JCB

What the judges said:
"This was awarded by the ERA's Technical Committee to a manufacturer that has made special efforts to accommodate the needs of rental companies in its product design."



Yvette Henshall-Bell (Group Managing Director – Global Accounts, JCB), George Bamford (JCB), and Martin Sebestyen (Head of Rental and Fleet Management, Zeppelin Rental, and chair, ERA Technical Committee).

The judging panel

From left: Murray Pollok (managing editor, IRN), Juan José Torres (president, ASEAMAC & managing director, TST Torres Servicios Tecnicos SL), Pierre Boels (ERA president and CEO of Boels Rental), Gerhard Gasser (global rental business manager, Hilti) and Michel Petitjean (secretary general, ERA).



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IRN100 Notes & thanks

IRN again thanks those companies and individuals who contributed information to the survey. If you have comments, or would like to be included next year, please contact the editor. Tel: +44 (0)1892 786211
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- Rankings are based on rental revenues for 2016 (or the most recent financial year) and include sales of used fleet and consumables/contractor supplies. Where known, sales of new equipment have been excluded from the survey.
- Figures denoted (Est) have been estimated by IRN. As in previous years, figures denoted RER are taken, with thanks, from the annual RER-100 survey published by US-magazine RER (Rental Equipment Register) in May 2017.
- All revenues have been converted into € using exchange rates as at 31/12/16, as follows (exchange rates used in last year's survey are given in brackets):
 - €1.00 = US\$1.057 (1.093)
 - = UK£0.852 (0.738)
 - = AU\$1.458 (1.51)
 - = CAS1.4141 (1.517)
 - = JPY123.053 (131.7)
 - = ZAR16.985 (16.99)
 - = SEK9.559 (9.19)
 - = SGD1.539 (1.547)
 - = NOK9.498 (9.603)
 - = BRL3.423 (4.326)
 - = CNY7.305 (7.087)
 - = NZ\$1.518 (1.598)

A growing IRN 100

As a year-on-year increase of 4.25% is recorded for the largest rental companies in the world, Joe Malone reviews the global rental market from 2016.

Once again IRN100 rental revenues grew year-on-year – by 4.25% – with the presence of rental getting stronger. A total of €41.2 billion was generated by the top 100, meaning the €40 billion mark had been breached for the very first time.

On a like-for-like basis (stripping out the impact of currency fluctuations between 2015 and 2016), the value of the IRN100 grew marginally by 4.2%

year-on-year, with the combined total of the top five companies rising some 6.4% to reach €14.2 billion at constant exchange rates, and €13.7 billion in real terms – see Table 1.

It must be noted that UK companies may have seen a decrease in their sales, when using Euros, but in local currency, this may not be the case. Indeed, the Euro appreciated against the pound over the course of 12 months.

It must also be noted that US companies grew by an average of 6% year-on-year.

So, the usual suspects remained at the top of the list, in the shape of United Rentals and Ashtead Group, while the rest of the top ten looked familiar, but were not necessarily in the same order as a year before.

Capital expenditure, however, did fall 12.1% year-on-year among the top 25 spenders, as no less than €6.3 billion was spent on new fleet investment – one which saw Ashtead Group rise above United Rentals in the rankings – see Table 6.

Products featured in the IRN100

IRN limits its definition of rental to products that are, broadly, related to the construction industry as well as some sectors of general industry and events. That means we include construction equipment, small tools, portable accommodation, aerial equipment, pumps, shoring equipment, power and temperature control. This excludes many other rental sectors, including specialist businesses such as medical equipment rental, testing and measurement equipment, and the rental of specialist oil and gas related equipment. Industrial forklift trucks is another sector that we do not yet cover.

RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
1	United Rentals	5261	5090	Greenwich, Connecticut, US	US, Canada	Construction equipment, Tools	887	12500	+001 (203) 622-3131 www.unitedrentals.com
2	Ashtead Group	3464	3226	London, UK	UK, US	Construction equipment, tools	779	13516	+44 020 7726 9700 www.ashtead-group.com
3	Aggreko	1778	2116	Glasgow, UK	100 countries globally	Power, temperature control and compressor rental	204	7300	+44 141 225 5900 www.aggreko.com
4	Aktio Corp	1713	1500	Tokyo, Japan	Japan, Thailand, Singapore, Malaysia, and Taiwan	Construction equipment, tool hire, party/events	857	6946	+81 3 6854 1413 www.aktio.co.jp/en/
5	Algeco Scotsman	1448	1416	Baltimore, Maryland, US	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia	Portable accommodation/ storage storage units	239	5049	+1 410 931 6000 www.algecoscotsmen.com

rental presence

TABLE 1

IRN100 Revenues

	2016 (currency adjusted)	2016 Revenues (€ billion)	2016 % change (adjusted)	2015 Revenues (€ billion)	2014 Revenues (€ billion)	2013 Revenues (€ billion)	2012 Revenues (€ billion)	2011 Revenues (€ billion)	2010 Revenues (€ billion)	2009 Revenues (€ billion)	2008 Revenues (€ billion)	2007 Revenues (€ billion)
TOP 5	€ 14.2bn	€ 13.7bn	6.4%	€ 13.35bn	€ 10.87bn	€ 9.23bn	€ 8.38bn	€ 6.96bn	€ 5.30bn	€ 5.04bn	€ 6.30bn	€ 7.20bn
TOP 10	€ 18.8bn	€ 18.5bn	3.8%	€ 18.1bn	€ 15.51bn	€ 13.01bn	€ 12.35bn	€ 11.44bn	€ 8.90bn	€ 8.07bn	€ 10.00bn	€ 10.80bn
TOP 50	€ 34.8bn	€ 34.5bn	5.7%	€ 32.9bn	€ 29.30bn	€ 25.55bn	€ 25.43bn	€ 24.23bn	€ 20.20bn	€ 18.73bn	€ 22.00bn	€ 22.10bn
TOP 100	€ 41.4bn	€ 41.1bn	4.2%	€ 39.7bn	€ 35.42bn	€ 31.70bn	€ 31.40bn	€ 29.43bn	€ 24.90bn	€ 23.20bn	€ 27.10bn	€ 26.90bn
TOTAL WORLD MARKET	€ 75bn ^(Est)			€ 73.5bn	€ 70bn	€ 70bn	€ 65bn	€ 60bn	€ 55bn	€ 55bn	€ 60-65bn	€ 62bn

RANK	COMPANY	TURNOVER (€ MILLION)	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
6 6	Herc Rentals	1290 1312	Park Ridge, New Jersey, US	US, Canada, France, Spain, China, Saudi Arabia	Construction equipment, tools			+1 201 307 2000 www.hertzequip.com
7 8	Loxam	927 838	Paris, France	France, Ireland, UK, Denmark, Germany, Spain, Belgium, Switzerland, Luxembourg, Morocco.	Construction equipment, tools	650	5000	+33 1 58 440 400 www.loxam.com
8 9	Nishio Rent All Co	924 834	Osaka, Japan	Japan, Malaysia, Thailand, Singapore, Vietnam	Construction equipment	386	3324	+81 6 6251 7302 www.nishio-rent.co.jp
9 10	Nikken Corp	834 756	Tokyo, Japan	Japan, US, Thailand, UAE, Indonesia, Myanmar	Construction equipment	196	2288	+81 3 5512 7311 www.rental.co.jp/english
10 7	Kanamoto	821 722	Sapporo, Japan	Japan, China, Hong Kong, Singapore, Indonesia, Thailand, Vietnam, Philippines	Construction equipment	461	2944	+81 3 5408 5600 www.kanamoto.co.jp
11 17	Maxim Crane	763 503 ^{RE}	Bridgeville, PA, US	US	Cranes and aerial platforms	31		+1 412 504 0200 www.maximcrane.com
12 11	Cramo	712 668	Vantaa/Helsinki, Finland	Northern, Central & eastern Europe, Russia	Construction equipment, tools, modular	324	2550	+46 8 623 5477 www.cramo.com
13 12	Ramirent	665 636	Vantaa, Finland	Fin, Sw, No, Den, Ru, Est, Lat, Lith, Pol, Hun, Ukr, Cz, Slov	Construction equipment, tools	290	2686	+358 20 750 200 www.ramirent.com
14 15	Home Depot Rentals	^{RE} 661 584 ^{RE}	Atlanta, Georgia, US	US, Canada, Mexico	Construction equipment, tools	1275		+1 770 433 8211 www.homedepot.com

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TABLE 2

IRN100 Regional trends

CONTINENT	NUMBER OF COMPANIES									
	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Europe	42	41	39	42	44	44	50	54	55	56
N America	33	35	35	34	31	30	28	27	27	26
Japan	9	10	10	10	10	11	11	11	12	13
Australia	4	5	5	6	6	6	6	4	4	4
South America	4	3	6	3	3	4	3	2	0	0
Middle East	5	3	3	3	3	2	0	0	0	0
Asia (inc China)	3	3	2	2	2	2	1	1	1	0
Africa	0	0	0	0	1	1	1	1	1	1

There were one or two big movers in the table this year, none more so than Maxim Crane Works, which threatened to enter the top ten for the first time, but fell marginally short, finishing 11th.

The US-based crane hire company rose six places after a 17th place finish in 2016, aided by its merger with AmQuip Crane Rental.

This which was triggered by Private equity firm Apollo Global Management in May last year.

A big mover further down the league table, in 65th place, was Netherlands-based Peinemann Holding, which rose 22 spots. However, it must be noted that last year's figure was an underestimate.

A few must-mentions from the IRN100 this year begin with the sad demise of former UK-rental >

RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
15 13	Coates Hire Ltd	618	612	Sydney, Australia	Australia	Construction equipment, tools	238	2400	+61 2 9701 3308 www.coateshire.com.au
16 14	Sarens	584	606	Wolvertem, Belgium	63 countries worldwide	Cranes	112	4195	+32 52 319 319 www.sarens.com
17 18	Taiyo Kenki Rental	547	484	Shizuoka, Japan	Japan	Construction equipment	110		+81 542 843 111 www.taiyokenki.co.jp
18 19	Kiloutou	532	462	Marcq en Baroeul, France	France, Poland	Construction equipment, tools	485	4000	+33 359 56 55 39 www.kiloutou.fr
19 22	Ahern Rentals	510	437	Las Vegas, Nevada, US	US	Construction equipment	78	2097	+1 800 400 1610 www.ahern.com
20 16	BlueLine Rental	507	511	Beverly Hills, CA, US	North America	Construction equipment	140	2000	+1 828 650 2311 www.volvorents.com
=21 24	Sunstate Equipment Co	477	430	Phoenix, AZ, US	US	Construction equipment	61	1600	+1 602 275 2398 www.sunstateequip.com
=21 23	AMECO	477	434	Greenville, SC, US	US, Canada, Mexico, Chile, Peru, Jamaica, Dominican Republic, Colombia, Australia, Philippines, Mozambique, Panama	Construction equipment, tools	32	2500	+1 864 295 7800 www.ameco.com
23 20	Mobile Mini Inc	458	453	Tempe, AZ, US	US, Canada, UK, Netherlands	Portable storage & accommodation	159	1500	+1 480 894 6311 www.mobilemini.com
24 21	Speedy Hire	431	446	Newton-le-Willows, UK	UK & Ireland, Middle East, North Africa	Construction equipment, tools	206		+44 0845 601 5129 www.speedyservices.com
25 38	Portakabin	426	297	York, UK	UK, Ireland, Netherlands, Belgium, France	Accommodation rental, events	1497		+44 01904 611655 www.portakabin.co.uk
26 26	H&E Equipment Services	424	405	Baton Rouge, Louisiana	US	Construction equipment			+1 801 908 4307 www.he-equipment.com
27 25	HSS Hire	400	423	Mitcham, UK	UK/Ireland	Construction equipment, tool Hire	300		+44 08457 282828 www.hss.com/ www.hsshiregroup.com
28 30	Boels Verhuur	385	340	Sittard, Netherlands	12 countries across Europe	Construction equipment, tools, party/events	365	3000	+31 (0)46 459 2159 www.boels.com
29 31	Neff Rental	376	336	Miami, FL, US	US	Construction equipment	69	1158	+1 305 513 3350 www.neffrental.com



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United Rentals boasts 887 depots across the US and Canada.

company Hewden, which went into administration at the back-end of last year, before Ashtead Group swooped to secure its powered access, power and industrial on-site businesses, plus the Hewden brand for £29 million (€32.9 million). Since its demise, companies such as GAP Hire Solutions have acquired former Hewden depots across the UK.

Another must-mention is Loxam's acquisition of Lavendon Group. However, as the deal didn't close until early 2017, such a move has not affected either companies' 2016 revenues. This

TABLE 3

IRN100 Drop-outs

COMPANY	REVENUES
Utleiecompagniet AS (UCO)	73
Pekkaniska Group	72

RANK	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
30	Select Plant Hire	EST 365	286	Dartford, UK	UK, Australia, UAE	Construction equipment, tools, tower cranes			+44 (0)1322 296200 www.selectplanthire.com
31	Zeppelin Rental	363	373	Garching (Munich), Germany	Germany, Austria, Czech/Slovakian Republics, Russia	Construction equipment, tools, party/events, accommodation	133	1236	+49 (0)89 32 000 220 www.zeppelin-rental.com
32	Liebherr Mietpartner	358	341	Ludwigshafen, Germany	Germany, France, Austria, UK, Switzerland	Construction equipment	130	268	+33 680 889 822 www.liebherr.com
33	NES Rentals (now owned by United Rentals)	352	348	Deerfield, IL, US	US	Construction equipment	75	1100	+1 800 NES RENT www.nesrentals.com
34	Lavendon Group plc (now owned by Loxam)	323	328	Lutterworth, Leicestershire, UK	UK, Germany, France, Belgium, UAE, Oman, Bahrain, Qatar, Saudi Arabia, India	Aerial platforms	76	1850	+44 1455 558 874 www.lavendongroup.com
35	HKL Baumaschinen	317	300	Hamburg, Germany	Germany, Austria, Poland	Construction equipment	140	1200	+49 (0)800 44 55 44 www.hkl-baumaschinen.de
36	Hitachi Construction Machinery Japan	312	311	Saitama, Japan	Japan	Construction equipment	274	3020	+81 (0) 48 933 5509 www.hitachi-kenki.co.jp
37	Mediaco	305	302 ^{EST}	Marseille, France	France, Germany, Africa	Cranes, construction equipment, specialised transport	62	1498	+33 4 9103 8191 www.mediaco.fr
38	All Family of Companies	RER 296	216 ^{EST}	Marseille, France	France, Germany, Africa	Cranes, construction equipment, specialised transport	60	1530	+33 4 9103 8191 www.mediaco.fr
=39	VP PLC	291	279	Harrogate, UK	UK, Ireland, Germany, UAE, S America, Singapore, Australia, South America	Construction equipment, tools			+44 (0)1423 533 445 www.vpplc.com



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“United Rentals, the US rental giant, constituted a massive 12% of the top 100’s rental revenues for 2016, at just under €5.3 billion.”

will, however, change for the IRN100 2018 version, which will be based on 2017 revenues. France’s Loxam bought Lavendon Group, from the UK, for €520 million, beating TVH Group to the prize.

Finally, table-topper United Rental purchased NES Rentals (which finished 33rd) for US\$965 million (€861 million) in April this year.

Again, this had no effect on either companies’ 2016 revenues, but the scale of the deal was one which warranted mention upfront.

Top five

So, dissecting the largest five rental companies in the world, it was no surprise to see United Rentals trump its nearest competitors by some way. The US rental giant constituted a massive 12% of the top 100’s rental revenues for 2016, at just under €5.3 billion. The company also invested some €1.2 billion in new fleet equipment, which fell marginally short of Ashtead’s expenditure, finishing 2nd in the table.

As previously mentioned, United’s acquisition of NES Rentals this year will further promote its stature in the coming years.

Again, unsurprisingly, Ashtead Group finished runners up in the IRN100 for 2017. The company recorded revenues of €3.46 billion in 2016, which represented 8.4% of the top 100’s revenues for the year. Compared to 2015, Ashtead cashed in an extra €250 million, while its 2016 capital expenditure was €1.2 billion. This was enough to lead the group, but still fell somewhat short of its total spend a year earlier, dropping 18%.

Third in the list came another UK giant in the >

TABLE 4
IRN100 New entrants

RANK	COMPANY	REVENUES
93	De Boer Structures	90
95	Ardent	84
=98	Matebat	80
=98	Arcomet	80

RANK	COMPANY	TURNOVER (€ MILLION)	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
=39 36=	Atlas Copco Specialty Rental Div.	EST 291 300 EST	Houston, US	65 countries worldwide	Compressors and generators			+1 281 454 2200 www.atlascopco.com/rental
41 34=	TNT Crane & Rigging	288 302	Houston, US	US	Cranes			(001) 800.799.2505 www.tntcrane.com
42 42	Toromont Industries	285 274	Stoney Creek, Ontario, Canada	Canada	Construction equipment	100	3500	+1 905 643 9410 www.battlefieldequipment.ca
43 43	Xylem	EST 275 262 EST	Bridgeport, US	Worldwide	Pump rentals			www.xylem.com
44 46	TVH Group	267 224	Waregem, Belgium	BE, NL, LUX, D, PL, CZ, HU, RO, SK, SRB	Construction equipment, aerial platforms, forklift trucks	89	1363	+32 56 43 42 11 www.tvh.com
=45 39	Zahid Group	EST 260 290 EST	Jeddah, Saudi Arabia	Saudi Arabia	Construction equipment, power			+966 2 6671156 www.zahidcat.com
=45 44=	Mammoet Holding BV	EST 260 260 EST	Schiedam, Netherlands	Worldwide	Crane rental	90	5200	+31 10 204 24 24 www.mammoet.com
47 47	Baker Corp	243 223	Texas, US	United States, Canada, EU (The Netherlands, Germany, France, Belgium, UK, Poland, Spain, Italy)	Construction, pumps, liquid containers	62	954	www.bakercorp.com
48 44=	Tat Hong	223 260	Singapore	Singapore, Malaysia, Thailand, Hong Kong, Vietnam, Indonesia, Myanmar, Papua New Guinea	Cranes, tower cranes, construction equipment			+65 62690022 www.tathong.com



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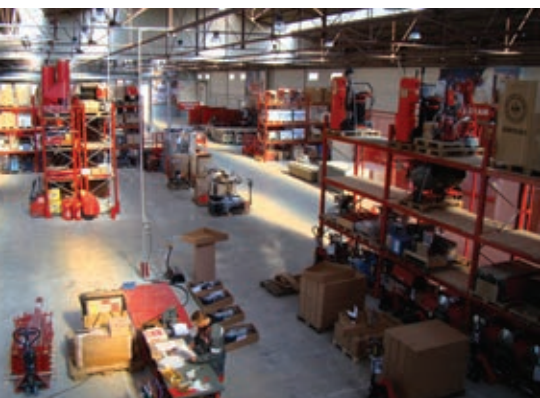


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RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
49 60	Rent Corp	219	184	Japan	Japan, Thailand	Construction equipment	54		+81 54 238 7000 www.rent.co.jp
50 51	Rival	216	212	Dordrecht, Netherlands	Netherlands, Belgium, Denmark, Sweden, Norway, UK, Germany, France, Poland, Spain, Slovenia, Croatia, UAE, Qatar, India, Brazil, Kazakhstan	Aerial platforms, power, telehandlers	59	1517	+31 78 618 1888 www.rival.com
51 52	ADCO	EST 210	207 EST	Ratingen, Germany	56 countries worldwide	Portable toilets			+49 2102 8520 www.adco.de
52 53	Komatsu Rental	209	199 EST	Yokohama, Japan	Japan	Construction equipment			+81 45 274 3337 www.komatsu-rental.co.jp
53 58	Lambertsson Sverige AB	203	160	Förlöv, Sweden	Sweden	Construction equipment			+46 431 89300 www.lambertsson.com
=54 56	Carrier Rental Systems	EST 200	190 EST	Leatherhead, Surrey, UK	UK, US, Germany, France, Holland, Poland, Singapore	Cooling equipment, pumps, generators, party/events			+44 (0)1372 220169 www.carrierrentalsystems.co.uk
=54 55	Caterpillar Japan (Nippon)	EST 200	191	Tokyo, Japan	Japan	Construction equipment	173	2716	+81 (3) 5717 1121 www.nipponcat.co.jp
=56 57	Kennards Hire	194	187	Sydney, Australia	Australia, New Zealand	Construction equipment, tools	140	1200	+61 2 880 56100 www.kennards.com.au
=56 48=	APR Energy	194	216	Jacksonville, Florida	Global	Power, TC			+1 904 223 2278 www.aprenergy.com
58 59	NCSG	191	185	Alberta, Canada	Canada, US	Crane rental	27	1080	+1-855-560-5050 www.ncsg.com
59 50	GAP Group Ltd	184	194	Glasgow, UK	UK	Construction equipment, tools	136	1600	+44 141 225 4600 www.gap-group.co.uk
60 64	Compact Power Equipment Rental	EST 180	164 EST	Fort Mill, US	North America	Compact construction equipment	1000		+1 803.324.8000 www.cpiequipment.com
61 67	Ring Power	REB 172	152 EST	St Augustine, FL, US	US	Construction equipment			+1 904 737 7730 www.ringpower.com
62 68	McGrath Rentcorp	171	148	Livermore, California	US, Canada	Portable accommodation			+1 925 606 9200 www.mgrc.com

shape of Aggreko. The company's rental revenues for 2016 were €1.8 billion, which represented a year-on-year fall of 16%, and saw 4th place Atkio Corp move that much closer to its third spot. Interestingly, Aggreko was the only company in the top five to see its revenues decrease year-on-year.

Aggreko operates throughout over 100 countries worldwide and has been the leading power supplier for major sporting events, such of the Winter Olympics.



Loxam was placed 7th in the IRN100, and topped the European Top 50.

Japanese rental company Atkio Corp and US-based Algeco Scotsman made up the rest of the top five, with both companies seeing increases to their revenues. Atkio Corp invested €437 million into new fleet equipment in 2016, while Algeco Scotsman spent €255 million.

Growth League

Technically, the biggest rise was seen by Peinemann Holding (58%). However, it must be noted that last year's figure was underestimated, therefore it was not placed in the Growth League (Table 7). It did, however, spend €38 million on new fleet for the year. The Netherlands-based company operates 12 depots and employs 650 people in the Netherlands and Belgium.

First on the list comes Maxim Crane Works. As previously stated, the company oversaw a merger with AmQuip Crane Rental, triggered by Private equity firm Apollo Global Management in May last year. As a result of the merger, AmQuip Crane Rental no longer exists as a standalone company, hence its disappearance from the IRN100, while its revenues were accounted for as part of Maxim's. The company's revenues rise was 52% for the year.

Portakabin came second in the growth league, achieving a revenues increase of 43% year-on-year. Casting back to the very end of 2015, the UK-based

company invested some €22 million in new modular buildings for its rental fleet. The increased fleet will have gone some way to ensuring the company's revenues grew in 2016.

TVH Group finished 7th in the Growth League, with increased revenues of 19% year-on-year. Such buoyancy was to be expected, given its attempt to steal Lavendon Group from the hands of Loxam six months ago.

The company made three, incremental bids for Lavendon Group, before admitting defeat to France's Loxam in February. However, the company was successful with its acquisitions of replacement glass and accessories supplier GDI and Industrial Access in the middle of last year.

European top 50

Europe's elite rental companies have been placed into their own European Top 50 League (Table 5), which sees Loxam maintain its place at the summit. As well as its acquisition of Lavendon Group, the company also acquired Spanish rental company Hune, though the price was not disclosed.

The company operates in several European countries, such as France, UK, Denmark, Germany and Spain, as well as further afield in Morocco. Loxam is placed 7th in the IRN100.

European runners up were Cramo. The Finnish >

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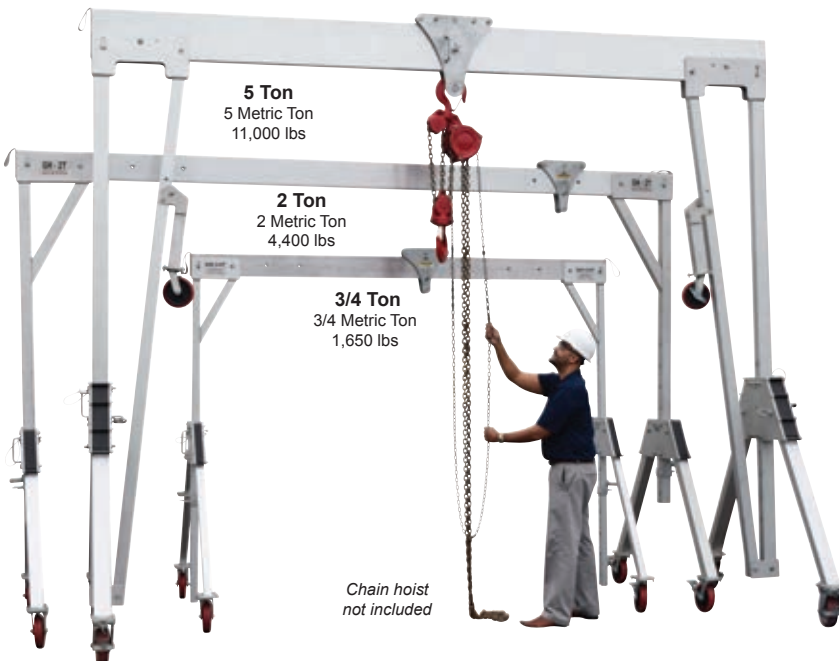
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RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
63 62=	Kyosei-Rentemu	165	166	Japan	Japan	Construction equipment, general rental	96		+81 155 33 1380 www.kyosei-rentemu.co.jp
=64 87=	Peinemann Holding B.V.	160	101 ^{EST}	Hoogvliet, Netherlands	Netherlands, Belgium	Cranes, aerial platforms	12	650	+31 10 295 5000 www.peinemann.nl
=64 66	ModSpace	RER 160	155 ^{EST}	Berwyn, PA, US	US, Canada	Portable accommodation			+1 484 254 0100 www.modspace.com
66 54	Finning International	159	193	Toronto, Canada	Canada, UK, Chile, Argentina, Bolivia, Uruguay	Construction equipment, power			+1 780 930 4800 www.finning.com
67 62=	Ainscough Crane Hire Ltd	EST 149	166	Wigan, UK	UK	Cranes			+44 (0)1257 478501 www.ainscough.co.uk
=68 70	Holt Cat	EST 143	136 ^{EST}	San Antonio, Texas, US	US	Construction equipment			+1 210 648 1111 www.holtcat.com
=68 65	Emeco Holdings	143	161	Perth, Australia	Australia, Canada, Indonesia, Chile	Heavy construction and mining equipment	332		+61 8 9420 0222 www.emecogroup.com
70 71	Lou-Tec	135	128 ^{RER}	Quebec, Canada	Canada	Construction equipment, aerial platforms, forklift trucks, power tools	80		www.loutec.com
71 73	SoEnergy International	EST 130	125 ^{EST}	Miami, Florida, US	Latin America, Middle East, Africa	Power rentals			+1 305 715 7308 www.soenergy.com
72 74=	Shanghai Panguan Construction Equipment Rental Co., Ltd	EST 125	124	Shanghai, China	China	Construction equipment, tower/crawler cranes	3915		+86 21 321 800 88 www.pangyuan.com
73 87=	Red-D-Arc Welderentals	RER 124	101 ^{EST}	Grimsby, Canada	US, Canada, Mexico, UK, France, NL, Germany, UAE	Welding/power.	50		+1 905 643 4212 www.reddarc.com
=74 79	AJ Networks	EST 120	117	Seoul, South Korea	Korea, Vietnam, Saudi Arabia	Construction equipment, access equipment	40	400	+82 2-6240-0827 www.ajrental.com/eng

rental company – which is placed 12th in the IRN100 – announced its Shape & Share strategy, which aims to see the company grow significantly over the next four years. Leif Gustafsson checked in as the company's new CEO early last year, and he told IRN that he wanted the company to be the shapers, not the followers, as it aimed to enter a period of sustained growth.

Cramo has since seen more changes to its personnel, with a new chief financial officer, two new vice presidents, a new managing director for its

Swedish operations and more.

In third place is Algeco Scotsman. While headquartered in the US, the company operates globally, and has a strong presence in Europe. Its European rental revenues were €695 million for 2016, constituting almost half of its group turnover. The company is placed 5th in the IRN100.

Like Cramo, Algeco Scotsman also has a new man at the helm, as Diarmuid Cummins took over as CEO in September last year. Interestingly, the company was set to form a merger with Modular

Space Corp (ModSpace) last year for its North American operations, which would have seen the company join forces in a 50/50 split. However, a few months later, Algeco terminated the deal, citing an incompleteness by the expiration date established by the merger agreement.

French company Kiloutou finished up in 5th place in the European Top 50 league table, while finishing 18th in the IRN100. In October last year, the company broadened its product range with deal to buy Compagnie Atlantique de Location (CAL), located in southwest France.

CAL provide temporary power and pump rental and boasts a network of five branches and a workforce of over 40 people. It has a fleet of almost 800 machines and accessories, including generators up to 1000KVA generators and pumps up to 1200m³/h. Kiloutou said the acquisition would be integrated into its specialty division.

Kiloutou also entered Germany last year with the acquisition of Germany-based aerial work platform rental specialist Starlift. Kiloutou said the transaction allowed it to continue its international expansion by entering the German market.

Starlift is a key regional player in access equipment rental in northern Germany with a network of three branches located in Hamburg, Berlin and Rostock, and over 50 staff.

Another company which has entered into a new market is Boels Verhuur. The Netherlands-based >

Cramo finished 12th in the IRN100 and operates 324 depots across Europe.



rental company recently entered the UK market with the acquisition of Supply UK Group, a nationwide tool hire business. Boels said Supply UK was one of the top ten tool hirers in the UK. Supply UK is based in Manchester and has 25 branches throughout the UK, including five specialist survey and laser rental locations. Boels did not disclose the acquisition price.

Boels Verhuur finished up in 11th place in the European Top 50 league table, and 28th in the IRN100.



Speedy Hire was the third highest UK rental company in the IRN100, behind Ashtead Group and Aggreko.

TABLE 5

ERN50 European rental revenues 2016

RANK 17 16	COMPANY	2016 REVENUES (€M)
1 1	Loxam	925
2 2	Cramo	712
3 4	Algeco Scotsman	695
4 3	Ramirent	664
5 19	Kiloutou	532
6 5	A-Plant	485
7 9	Speedy Hire	431
8 7	Sarens	EST 430
9 16	Portakabin	426
10 8	HSS Hire	400
11 12	Boels Verhuur	385
12 17	Select Plant Hire	365
13 10	Zeppelin Rental	363
14 11	Liebherr Mietpartner	358
15 14	Aggreko	330
16 13	Lavendon Group plc (now owned by Loxam)	328
17 22	HKL Baumaschinen	317
18 15	Mediaco	305
19 19	TVH Group	267
20 18	VP PLC	260
21 21	Mammoet Holding BV	EST 205
22 23	Lambertsson Sverige AB	203
23 NEW	Carrier Rental Systems	200
24 23	ADCO	EST 184
25 20	GAP Group Ltd	184
26 30	Peinemann Holding B.V.	160
27 25	Ainscough Crane Hire Ltd	149
28 26	Riwal	127
29 27	Nordic Crane	EST 120
30 28	Compagnia Generale Trattori (CGT)	EST 115
31 NEW	Brandon Hire	108
32 32	Hawk Plant Hire	106
=33 37	General de Alquiler de Maquinaria (GAM)	105
=33 NEW	Jewson Tool Hire	EST 105
35 NEW	Energyst BV	EST 92
36 38=	De Boer Structures	90
37 40=	Ardent	84
38 35=	Prangl Gesellschaft M.B.H.	82
=39 35=	Foselev	80
=39 NEW	Matebat	80
=39 44	Arcomet	80
42 34	Utleiecompagniet AS (UCO)	73
=43 38=	Pekkaniska Group	72
=43 42	HUNE Rental (now owned by Loxam)	72
45 42	Salti	EST 71
=46 40=	Nixon Hire	66
=46 45	Touax	66
48 46	Malthus	64
49 47	Avesco Rent	EST 54
50 50	Acces Industrie	53
	TOTAL (€billion)	12243

New entrants

Meanwhile, there were four new entrants to the IRN100 this year. Topping the list of new companies was De Boer Structures, which was placed at joint 93rd alongside Komatsu Cummins Chile Arrienda. The company recorded revenues of €90 million for 2016, compared with €73 million >

TABLE 6

IRN100 Capital expenditure Top 25 investors

COMPANY	GROSS CAPITAL EXPENDITURE 2016 (€ MILLION)
1 Ashtead Group	1222.0
2 United Rentals	1193.0
3 Aktio Corp	437.0
4 Hertz Equipment Rental Corp	350.0
5 Aggreko	325.0
6 Kanamoto	278.0
7 Algeco Scotsman	255.0
8 Nishio Rent All Co	233.0
9 Cramo	207.0
10 Loxam	198.0
11 Ramirent	191.0
12 H&E Equipment Services	179.0
13 Zeppelin Rental	158.0
14 Ahern Rentals	121.0
15 AMECO	118.0
16 Nikken Corp	104.0
17 Neff Rental	94.0
=18 Speedy Hire	90.0
=18 Lavendon Group plc	90.0
20 Sunstate Equipment Co	89.0
21 HKL Baumaschinen	79.0
22 Riwal	72.0
23 GAP Group Ltd	68.0
24 VP PLC	65.0
25 Liebherr Mietpartner	58.0
TOP 25 SPENDERS	(-12.1%) €6.3bn
TOP 25 (2015)	(-7.9%) €7.0bn
TOP 25 (2014)	(+26.7%) €7.6bn
TOP 25 (2013)	(-4.8%) €6.0bn
TOP 25 (2012)	(+10.5%) €6.3bn
TOP 25 (2011)	(+211%) €5.7bn
TOP 25 (2010)	(+209%) €2.7bn
TOP 25 (2009)	(-70%) €1.3bn

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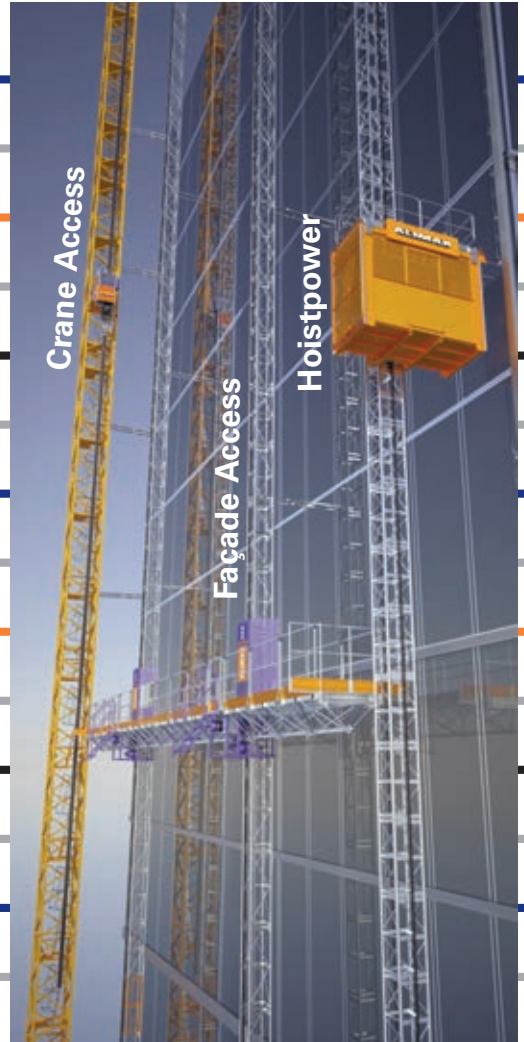
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RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
=74 74=	Nordic Crane	EST 120	124	Halden, Norway	No, Sw, Fi, Dk	Cranes	50	600	+47 69 21 70 70 www.nordiccranegroup.com
76 77	Cleveland Brothers Equipment Co	RER 119	121 RER	Murrysville, PA	US	Construction equipment	21		+1 866 551 4602 www.clevelandbrothers.com
77 72	Mills Estruturas e Serviços de Engenharia	116	127	Rio de Janeiro, Brazil	Brazil	Aerial platforms, telehandlers, formwork, shoring	31	1295	+55 21 21 233 700 www.mills.com.br
=78 82	Madisa	EST 115	111	Monterrey, Mexico	Mexico	Construction equipment	44	2357	+52 01 800 92 623 472 www.madisa.com
=78 81	Compagnia Generale Trattori (CGT)	EST 115	113	Milan, Italy	Italy	Construction equipment	54	200	+39 02 274 271 www.cgt.it
80 78	Equipment Depot	RER 114	119 EST	Texas, US	North America	Construction equipment, access equipment			(+1)7138696801 www.eqdepot.com
81 86	Byrne Equipment Rental	EST 107	102	Dubai, UAE	UAE, Oman, Qatar, Saudi Arabia	Construction equipment, aporable accommodation, events.	13	750	+971 4 4544800 www.bynerental.com

a year earlier. De Boer also topped the list of near misses last year, at 101, and its healthy increase in 2016 means the company jumped eight places year-on-year.

De Boer is a Netherlands-based company which operates globally, renting mainly for the events industry. It has nine depots and employs 250 people.

Next up, in 95th position, is Ardent. The UK rental company – which also made the near misses table last year – recorded revenues of €84 million for 2016, which is a rise of €12 million year-on-year. Ardent is a renter of construction equipment and has 11 depots to its name, while employing 220 people.

Last year, Speedy sold its large plant fleet to Ardent

Hire Solutions for £14.4 million (€16.3 million) in cash. The sale included excavators, dumpers and ride-on rollers with operating weights of 3 tonnes and above.

Ardent was created by the merger of Fork Rent and One Call Hire in 2015 – a deal that was engineered by former Speedy CEO Steve Corcoran.

Finally, Matebat and Arcomet entertain the bottom >



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RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
=82 85	General de Alquiler de Maquinaria (GAM)	105	105	Madrid & Oviedo, Spain	Spain, Portugal, Morocco, Poland, Saudi Arabia, Mexico, Brazil, Chile, Peru, Panama, Colombia, Dominican Republic	Construction equipment	80	1000	+34 985 732 273 www.gamalquiler.com
=82 69	Boom Logistics	105	138	Melbourne, Australia	Australia	Cranes, aerial platforms	20	550	+61 3 9864 0200 www.boomlogistics.com.au
=82 76	SK Rental Group	105	122	Santiago, Chile	Chile, Peru, Brazil, Colombia	Construction equipment	22	540	+56 2 837 3500 www.skrental.cl
=82 90=	Jewson Tool Hire	EST 105	98 EST	Coventry, UK	UK	Tool hire			+44 024 7643 8400 www.jewson.co.uk/tool-hire
=86 90=	Ohio Cat	EST 100	98 EST	Ohio, US	US				1440.52662 www.ohio-cat.com
=86 89	Onsite Rental Group	EST 100	100 EST	Sydney, Australia	Australia	Construction equipment			+61 2 8814 3200 www.onsite.com.au
=88 80	Warren Cat	RER 95	115 RER	Texas, US	US	Construction equipment	17		14059476771 www.warren-cat.com
=88 95	Rental Solutions & Services (RSS)	EST 95	89 EST	Dubai, UAE	Middle East, Pakistan, Africa, Cyprus.	Power, Temp control			+971 4 8849699 www.rss.ae
90 84	Brandon Hire	94	108	Bristol, UK	UK	Construction equipment, tool hire, party/events	150	924	+44 (0)117 972 0872 www.brandonhire.co.uk
=91 93=	Energyst BV	EST 92	90 EST	Breda, Netherlands	Europe, South Africa, Chile, Argentina	Power, temperature control			+31 (0)800 3637 4978 www.energyst.com
=91 92	Hawk Plant Hire	92	91	Shropshire, UK	UK, Europe, West Africa	Construction equipment		500	www.hawk-group.co.uk

spots. Both companies recorded revenues of €80 million for 2016. Holgat is the private owner to both Matebat and Arcomet's France's operations.

TABLE 7

IRN100 Growth league

COMPANY	% GROWTH
1 Maxim Crane	52%
2 Portakabin	43%
3 Mediacco	36%
4 Select Plant Hire	27%
5 Lambertsson Sverige AB	26%
6 Red-D-Arc Welderentals	23%
7 TVH Group	19%
8 Rent Corp	18%
9 Ahern Rentals	16%
10 McGrath Rentcorp	15%

“ The European Rental Association (ERA) also forecast an increased rental growth rate for 2017 and 2018 – from 0.9% to 1.2% in 2017 and 0.5% to 3.5% in 2018 ”

Near misses

There were ten companies which didn't quite make the top 100 in the IRN100 this year.

Firstly x, which finished in position 101, saw revenues of €75 million for 2016 – €5 million short of Arcomet in position 100. Touax is based in France, and headquarter in Paris, and rents portable accommodation.

Norway-based Utleiecompagniet AS (UCO) is a renter of a range of construction equipment, cranes and tools. It has 18 depots and employs 271 people in its home country.

Hune also appear on the near misses list. This company will no longer feature in the IRN100, having been acquired by Loxam earlier this year. However, it recorded revenues of €72 million in 2016.

Nixon Hire and Avesco Rent both invested in their fleet in 2016, which should see a knock-on effect in their revenues next year.

New era

With more ways to rent machines now than ever before, via the likes of online rental marketplaces, >

TABLE 8

IRN100 Top 10 'Global' players

RANK	COMPANY	REVENUES (€ MILLION)	NOTES
1	Ashtead Group	3464	UK, US, Canada
2	Aggreko	1778	Over 100 countries worldwide
3	Algeco Scotsman	1448	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia
4	Hertz Equipment Rental	1290	US, Canada, France, Spain, China, Saudi Arabia
5	Nikken Corp	834	Japan, USA, Thailand, UAE, Indonesia, Myanmar
6	Home Depot Rentals	661	US, Canada, Mexico
7	Sarens	584	63 countries worldwide
8	Ameco	477	US, Canada, Mexico, Chile, Peru, Jamaica, Dominican Republic, Colombia, Australia, Philippines, Mozambique, Panama
9	Mobile Mini Inc	458	US, Canada, UK, Netherlands
10	Speedy Hire	431	UK & Ireland, Middle East, North Africa

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

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RANK 17 16	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		16/15	15/14				DEPOTS	STAFF	
=93	Komatsu Cummins Chile Arrienda	EST 90	90	Santiago, Chile	Chile	Construction equipment	10	194	+56 2 2979-9200 www.komatsuarrienda.cl
=93	De Boer Structures	90	73	Alkmaar, Netherlands	NL, BE, UK, DE, ES, FR, QA, AE	Party/events, marquees	9	250	+31 72 5400 444 www.deboer.com
95	Ardent	84	72	Enfield, UK	UK	Construction equipment	11	220	+443333202555 www.ardenthire.com/
96	Briggs Equipment	REB 83	82	Dallas, TX, US	US, Mexico, UK	Construction equipment			+1 214 630 0808 www.briggsequipment.com
97	Prangl Gesellschaft M.B.H.	82	80	Brunn/Gebirge, Austria	Europe	Cranes, aerial platforms	16	655	+43 02236 326 350 www.prangl.at
=98	Foselev	80	80	Aix-en-Provence, France	France, Congo, Gabon	Cranes, portable accommodation, aerial platforms			+33 4 42 24 57 57 www.foselev.com
=98	Matebat	80	64	Loury, France	France	Tower cranes	120	235	+33 2 38 75 09 09 www.matebat.fr/fr/accueil
=98	Arcomet	80	68	Paal, Belgium	Worldwide	Tower cranes			+32 11 450 950 www.arcomet.com
TOTAL TURNOVER 2016/15 €41.1 billion									

Watch this space for further analysis

The IRN100 Extended Toplist – a more detailed look at this year's IRN100 survey – will be available in the coming months from the KHL.com Information Store.

This stand-alone, extended version of the table will not only include data on company revenues, fleet investment and industry consolidation, but also new commentary on each of the companies in the IRN100, as well as extra graphs analysing the trends.

The idea is to provide additional background context on the companies in the table, delving deeper into the reasons as to how and why they got to their position in the ranking.

The additional graphs and charts also make it easier to interpret the data, offering a great visual representation of the trends in the industry.

A video featuring editor Joe Malone analysing this year's table will also be available soon on khl.com

companies have the potential to see increasing revenues and continue to grow at a healthy rate.

The European Rental Association (ERA) also forecast an increased rental growth rate for 2017 and 2018 – from 0.9% to 1.2% in 2017 and 0.5% to 3.5% in 2018 – with Germany, Sweden, Poland and the Netherlands said to be the markets seeing the biggest positive changes in the forecasts.

The potential of seeing the benefits of this in future IRN100 reports will be exciting for the European operators, while acquisitions and mergers will come into force among companies all over the world, meaning there may well be big changes next year, too.

IRN

TABLE 9

IRN100 Near misses

RANK	COMPANY	2016 REVENUES (€M)	LOCATION	TYPE OF RENTAL	CONTACT DETAILS
=101	Touax	73	Europe, US, Africa	Portable accommodation	www.touax.com
=101	Utleiecompagniet AS (UCO)	73	Norway	Construction equipment, tools, cranes	www.uco.no
=103	Pekkaniska Group	72	Fin, Swe, Rus, Ukr, Baltics	Aerial platforms and cranes	www.pekkaniska.com
=103	HUNE Rental (now owned by Loxam)	72	Spain, Portugal, France, Saudi Arabia, Colombia	Construction equipment, party/events, tool hire	www.hune.com
105	Salti	71	France	Construction equipment, tool hire, parties/events	http://salti.fr/
106	Nixon Hire	66	UK, Middle East	Construction equipment, tool hire, parties/events	www.nixonhire.com
=107	Malthus	64	Norway, UK and Canada	Construction equipment, modular buildings	www.malthus.no
=107	Shanghai Horizon Equipment & Engineering	64	China	Construction equipment	www.horizon-equipment.com
109	Solaris Equipamentos E Servicos	62	Brazil, Argentina	Construction rental	www.solarisbrasil.com.br
110	Avesco Rent	54	Switzerland	Construction, tool hire, party and events, DIY	www.catrental.ch

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Shine a light

As manufacturers of lighting towers reach a crucial time in their sales calendar, Joe Malone reviews the latest products on the market which, if not already, will be seen on sites across the world this year.



The HiLight V2+ and V3+ are housed on a four-wheel trailer for ease of transportation.



Worklite was launched at the International Rental Exhibition (IRE) in Amsterdam, the Netherlands in May.

Worklite hones Finnish article

Finnish company TSR-Lighting recently launched its new motion-sensor light – Worklite – at the International Rental Exhibition (IRE), held in May this year.

The new product is an upgrade on its Worklite range, and is the first motion-sensor light it has manufactured, claiming energy savings of up to 70%.

The product uses an LED light and is reactive to movement, producing a small output when there is no motion, and runs at full power of up to 25W when motion is sensed.

The company said a comparison was made with rival products on an 18-month construction project, which saw Worklite reduce costs from €10000 to €3500.

Mikael Niittymäki, export manager, TSR-Lighting, said, "Worklite is a core rental product and we've had lots of success with it in the past."

"Cramo, for example, has up to 20000 Worklite products, and our latest version comes as a result of us speaking to rental companies and answering to their needs."

He added that other rental companies, such as Ramirent, Loxam and Renta Group, were key customers for its Worklite product.

This time of the year is always important to manufacturers of light towers, as innovation over the past year will see their recently launched products sold at their peak high rate over the next few months, before the darker nights fall upon the majority of the world.

This year, as ever, has presented such companies with the chance to showcase their models, following major exhibitions across the world, and manufacturers are looking for ways to shine above the rest.

One company which aims to do just that is Morris Site Machinery – a UK-based manufacturer of lighting towers which sells to many regions of the world. It has launched its latest TL90 Ultimate and LED Standard models.

Presented at the back-end of last year, this coming autumn will be the first time its new models will be rolled out to construction sites.

Branded as SMC TL90 Ultimate, it claims to have up-to-the-minute engine technology with both Perkins and Kubota options offering longer run times. An update to its predecessor TL90 models, it has been engineered to deliver a 50% increase in fuel capacity and run time, with up to 90 hours of operation and greater cost savings.

The TL90 LED is powered by a Kubota Z482 engine and has new features including a Deep Sea

3110 controller and four 300W lampheads.

The company has also launched a new app which allows its buyers to customise their models, from a basic spec, to any feature they want.

Phil Winnington, international business director at Morris Site Machinery, said, "It is this attention to detail and understanding of how our products are used onsite around the world, which sets our innovation apart and ensure they are built to perform."

"We are making significant introductions to extend our range of products and price points throughout 2017/18 while maintaining the great quality and



Generac's V20 lighting tower boasts 180 hours of run time.

Morris Site Machinery has launched the TL90 Ultimate – its most powerful and efficient model yet.

service we are renowned for to meet the industry needs in the UK and overseas."

Three new models

Swedish manufacturer Atlas Copco has expanded its HiLight tower range with the launch of three new advanced LED plug-and-light models.

The models are the P2+, V2+ and V3+, and can all be powered directly from an auxiliary power

source, the grid or a portable generator. All three energy-efficient additions are said to offer minimum maintenance, easy portability and safe transportation, according to the company.

Atlas Copco says its V2+ and V3+ are specifically designed for use on road works and construction sites, and are housed on a four-wheel trailer for ease of transportation. The V2+ light tower features a 320W LED light source, covering 2000m², while the HiLight V3+ is equipped with four 120W LED lamps combined with specially designed directional glass optics capable of illuminating an area of up to 3000m², says Atlas Copco.

Both the V2+ and V3+ have manually operated vertical masts that extend up to 5.5m and allow for 9° of rotation.

Felix Gomez, product marketing manager for light solutions at Atlas Copco Portable Energy, said, "Our new HiLight towers are designed to help workers experience a brighter, safer environment that will enhance their productivity.

"What's more, the LED lamps experience no burn-out problems and have a life expectancy of 30000 hours, which contributes to lower maintenance costs and longer service intervals."

US-headquartered company Generac has launched its latest lighting tower – the V20 model – which is equipped with four 300W high efficient LED lamp floodlights. The company claims it has one of the lowest sound pressure levels in the industry at only 58dB at 7m.

It is powered by a Kubota Z482 engine and boasts more than 180 hours of run time.

Trime SPA, the Italian manufacturer of lighting

Trime's flagship X-ECO LED 6 model pictured at the UK's Executive Hire Show.



A collaboration between TSR and Luxtower sees the product TSR Luxtower 150 launched.

towers, offers a range of models, with its flagship model being the X-ECO LED 6.

The company have been in operation for around a year, but boast a wealth of experience in its ranks. The company's CEO, Ray Caulfield, for one, was awarded the Lifetime Achievement Award at the European Rental Awards in May, after a career spanning 52 years to date.

The X-ECO LED 6 has been manufactured specifically for the European rental markets and has a series of safety and environmental features that will bring significant benefits to both the operator, the rental company and the wider geographical area.

Operators will capitalise on energy savings, longer run times between refuelling, instant bright light and the built-in auto start/stop light sensor, says the company. Safety is heightened by the X-ECO AMOSS safety system, which automatically lowers the mast if the lighting set is moved whilst the mast is still erected.

Trime has calculated that the X-ECO uses approximately €400 less in fuel each month, which gives rise to a reduction in CO₂ output by around 888kg per month. Thirteen X-ECO's can be loaded on one single truck, meaning potentially less traffic on already busy European highways.

Most popular

Finnish manufacturer TSR-Lighting says it has had success with its TSR-Luxtower 150 model, which it launched in the third quarter of 2016. Indeed, the company claims it is the most popular lighting tower of its category in Scandinavia.

The product was created as a result of a collaboration between TSR and Italy's Luxtower, and was designed specifically for Scandinavian market. TSR says that demand for proper site lighting is growing in Northern Europe.

Key features of the model include a 7m galvanised mast, which has a lifetime warranty. The mast can rotate up to 350°.

There are four 150W LED floodlights that can illuminate an area up to 2400m², as well as two forklift pockets and a central lifting eye.

Since the lighting tower as presented to the Scandinavian market, it has sold over 500 units to companies such as Ramirent, Skanska and Renta

Lightbulb moment for Chicago

Onsite equipment manufacturer Chicago Pneumatic, based in the US, has secured a breakthrough sale for its CPLT V15 lighting tower to a contractor in Kuwait.

The sale came about through its distributor General Transportation & Equipment Company (GTE), which will supply the 25 lighting towers to the time-sensitive, oilfield construction project.

The lighting tower boasts low operating costs, with the company claiming that, through over 2000 hours of usage, the end-user can save 2000 litres of fuel.

Ejazul Hassan, equipment sales manager for GTE, said, "The CPLT V15 LED is highly efficient, making it ideal for projects requiring a large number of lighting towers.

"With this model, users can save on both fuel and maintenance costs. For instance, the LED's lifespan is 30000 hours, compared to 6000 hours provided by a metal halide bulb. This means the CPLT V15 LED's bulbs don't need to be replaced for approximately three years."



Chicago Pneumatics CPLT V15 LED lighting tower boasts low operating costs.



The lighting tower can also be controlled via a computer, laptop and smartphone, by linking to the BGG remote fleet monitoring system.

Another UK-based manufacturer Ritelite has recently launched its new MK2 version of its range of K50 & K65 mobile lighting towers. On show for the first time in Amsterdam, the Netherlands, at the International Rental Exhibition (IRE) in May, the company told *IRN* its K50 and K65 were designed specifically to meet the needs of rental customers.

The K50 has a working height of 5m, while the K65 has a working height of 6.5m. New to the two models are Forklift pockets, which in addition to the existing lifting eye, increases versatility and speed of loading and unloading operations. They also feature double automatic security locking pins on each mast section for increased safety. **IRN**



Ritelite's new K50 model has a working height of 5m.

Group. The company said the attention its new lighting tower had received had surprised them.


One company which claims to be 'going green' is BGG UK. The manufacturer says that its LiON Light lighting tower is powered by a water cooled diesel engine and lithium ion battery pack.

This green solution reduces the noise pollution level to zero and has the ability to run on battery power alone for up to ten hours. A major benefit of that, of course, is the ability for renters to use BGG UK's lighting tower in urban sites and have no noise-related issues.

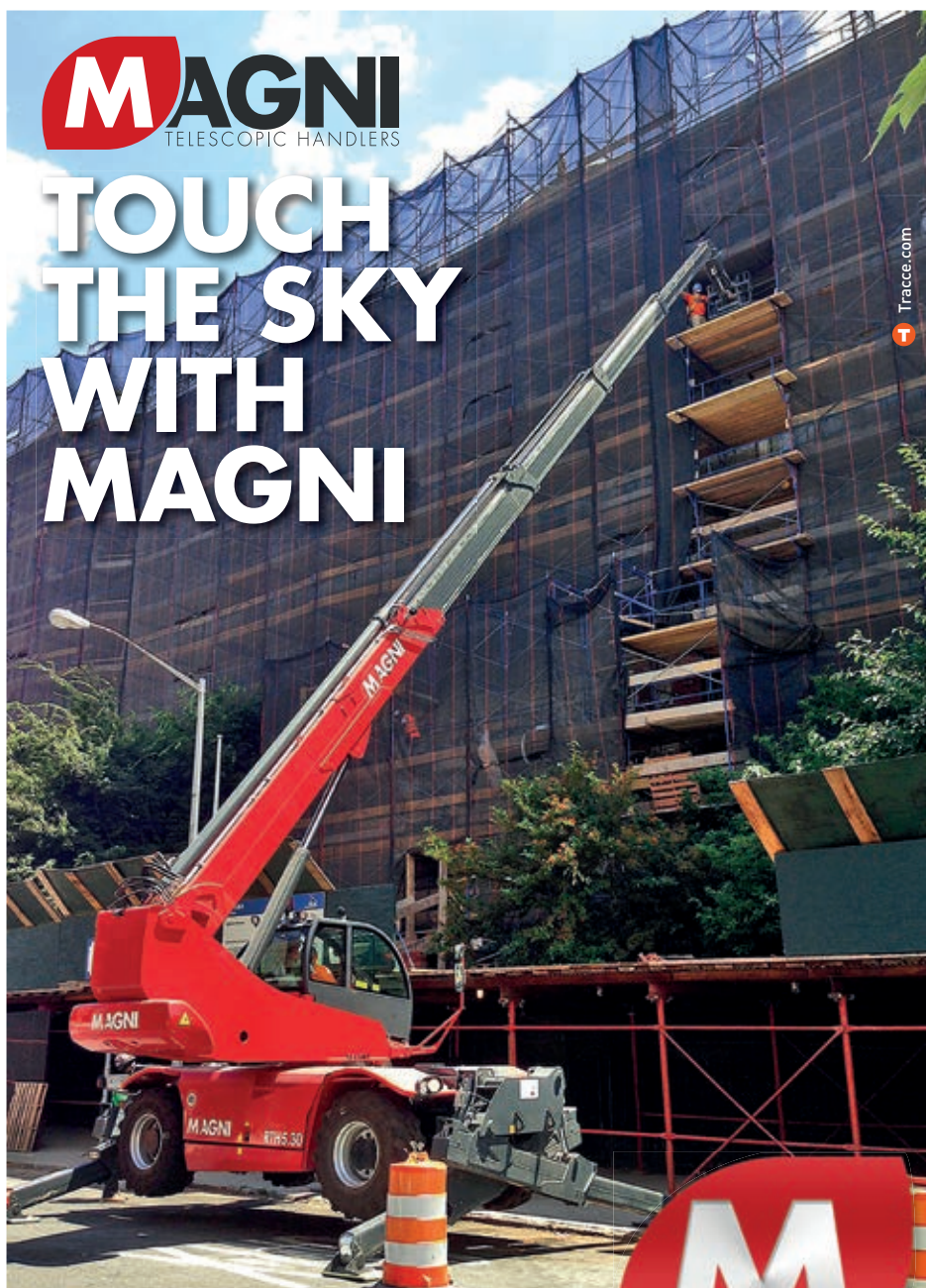
The company says its model provides a comparable light output to a standard metal halide unit and offers substantial fuel savings over both metal halide and standard LED lighting towers.



BGG UK aims to go green with its new LiON Light lighting tower.




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Sensing opportunity



Phil Winnington, international business director, Morris Site Machinery.

Innovation is a word used on a daily basis in the construction and rental industry, and is the magic ingredient to a company's success. For UK-based Morris Site Machinery – a manufacturer of on-site equipment such as lighting towers – precisely the same applies.

The company began producing lighting towers some 27 years ago and, until 2010, had just two products of its type to its name. However, the past seven years have proved fruitful in that market, and it now boasts in excess of 25 different models, when including product variations.

New to 2017, however, comes an innovation fitting to the modern technological world the industry now operates in – a build-it-yourself App. Named Deign my Light, the App allows customers to view a basic lighting tower, and add their own features to tailor their specific needs.

The App constitutes a major step forward in the company's offerings, according to its international business director, Phil Winnington. "We're always looking for ways to innovate, and with the introduction of several new products over the last seven years, we felt we needed to look at something a little bit different, which mirrored the current world we live in," he said.

"We get rental companies asking for specific features, and each of our customers want

“ IRE was the first show we did with Eurogate, and it went well, but it'll take time to develop, like all good things. ”

As Morris Site Machinery continues to develop its name, Joe Malone caught up with its international business director, Phil Winnington, to see where it's heading over the coming years.

something slightly different, so the App means that we can offer all types of products, and produce them to order. We obviously offer standard Morris features, so it's simple enough for us to create, but means we're giving our customers exactly what they want."

The App was launched at the Executive Hire Show in the UK, earlier this year, and Mr Winnington said it had had a good response so far.

Latest and greatest

Speaking of innovation, the company also launched its latest and greatest lighting tower product at the UK event in February – the TL90 Ultimate. Known under its SMC brand name, the model is said to provide a 50% increase in fuel capacity and run time, compared to its predecessor model – the SMC TL 90.

Mr Winnington said the Ultimate version of the TL90 was a year-year, on-going product, which shared similarities to the company's very first lighting tower – the TL35. He said this winter would be the first time

the model would be rolled out in mass onto construction and event sites.

While based in the UK, Morris operates globally, and the company has recently set its sights on concurring in North America. "There are ambitions to get into the market," said the company's international business director. "I went to The Rental Show in February to try and appreciate the market, rather than us just turning up with a set of tools and not understanding what it's all about. It's at a lower end in terms of product specification, but it's one we're interested in."

Morris also operates east of the UK, with Australia proving a key market. In fact, Mr Winnington said that over 60% of its overseas sales went to Australia, while Dubai was at the top of its fast-growing list.

Innovation is more than just product >

The company's most recent innovation – the TL90 Ultimate.



Morris Site Machinery's TL90 LED product.

development, its company expansion, in all forms. Last year, the company began collaboration with Eurogate, which now represent Morris' SMC Light and Power brands in France, Benelux, Germany, Switzerland, Austria, Poland and Norway. The International Rental Exhibition (IRE), organised by IRN and the European Rental Association, was the first time the companies came together in the public domain, in order to promote the SMC brand.

In light of this, Mr Winnington said, "it's a long-term process, but it's one that we're excited about. Both Morris and Pieter Jansen of Eurogate share the same philosophy, and we believe it will be a success."

"It all came about post-Brexit. The chairman of Morris came to me and said we had a two-year opportunity, in order to take advantage of the political outcome. I spoke to IRN and about European companies, and Eurogate was recommended to us. The funny thing is, Pieter and I realised that we'd known each other from years before, through business, so there was an instant connection there, as if we knew each other very well."

He added, "IRE was the first show we did together, and it went well, but it'll take time to develop, like all good things."

Positive thoughts

The UK's decision to leave the European Union was made some 12 month ago now, giving Brit's a chance to digest the reality, and Morris believes it is an opportunity, not a hindrance. "What has happened has happened, and we must embrace it," said Mr Winnington. "It's a chance for UK



Morris Site Machinery boasts a handful of lighting towers to its name, under the SMC brand.

companies to stand out in Europe now, given its independence, and it certainly presented us with the opportunity of a collaboration with Eurogate, in order to expand even more so."

Morris collaborates with other companies, too, such as Western Global, which provides the company with fuel storage tanks, should its customers require. Such collaboration means the company does not have to create entire new sectors

within its own ranks, and means it can leave certain innovations to the experts.

Morris already has its own vision and expertise in-house, and has enjoyed an exciting start to 2017. New innovation and collaboration, as well as new target markets, has given the company fresh vision for the coming years – one which rental companies will likely see the benefits of, should Morris prove successful.

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Securing young talent

In his first ERA Convention as president, Pierre Boels discussed the crucial war for young talent facing the rental industry.

One of ERA's key achievements is our Annual Convention.

Open to members, associate members and non-members, we notice each year a renewed and increasing interest as we are now over 280 participants present here this year.

We also acknowledge an assiduous presence of some non-member rental companies and we thank also them for attending and taking part in our convention. In particular, this year, we are very proud to have among us many Dutch rental companies and suppliers to the rental industry.

This year, the theme of our Convention is securing talent for the future.

Considering the outcomes of the workshops at the last Convention and the discussions in the ERA's committees and Future Group, the ERA board decided that this Convention should focus on people.

The rental industry is about equipment but, most

ERA CONVENTION 2017: SECURING TALENT FOR THE FUTURE

The European Rental Association Convention took place from 2-4 May, in Amsterdam, the Netherlands, alongside the International Rental Exhibition (IRE) and APEX aerial platform show. The theme of the Convention was securing talent for the future and included visits to rental depots close by.



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Pierre Boels, ERA president and CEO of Boels Rental.

of all, it is about services and, if the rental business doesn't spend some time understanding how people are evolving and will evolve in the coming years, the chances are high that our sector will not be ready for the future.

A better understanding of people will help to improve relations to customers but also will help securing talent for the rental industry.

I also take this opportunity to point out that all the work done within ERA, in the board and committees, or here in the conventions, is done for the benefit of our members.

I am encouraging you to be our ambassadors and to spread the word to the companies or associations who are still hesitating to become members of our association. Getting more members means

PIERRE BOELS has been president of the European Rental Association for one year, replacing Vesa Koivula, whose three-year term came to an end. Mr Boels is also CEO of Dutch rental company Boels Rental, which recently entered the UK market with the acquisition of Supply UK Group, a nationwide tool hire business.

gathering more knowledge, having more to share and being more powerful when it comes to protect and promote our interests.

On behalf of our board of directors: Mark Anderson, Xavier du Boÿs, Leif Gustafsson, Wolfgang Hahnenberg, Armin Rappen and Luis Angel Salas Manrique, I would like to commemorate the involvement and the active participation of the board members.

We have followed very closely the work and development of our five committees and of the Future Group, and have been delighted to see that the committees are so dynamic and enthusiastic.

We know how much time and energy the work requires and we want to thank the members of the committees for their commitment and their companies for their support.

Their contribution is extremely valuable for ERA because of their expertise. Next to that taking part in the committees proves rewarding both professionally and personally for the committee members.

I'd like to thank the committees for all of their work, which have been the backbone of the associations work since forming 11 years ago.

IRN

“ A better understanding of people will help to improve relations to customers but also will help securing talent for the rental industry. ”

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Metric trends

Rouse Services reports on the latest metrics for crane utilisation and auction prices in the US.

In connection with the more challenging utilisation and rate environment, Rouse observed consistent and material weakening in used equipment valuations throughout 2016; this was most evident in the auction markets. So far, through 2017, Rouse has early indications of a stabilising pattern in used equipment markets.

Within the auction market, this has been a theme for rough terrain and all terrain cranes. Within retail

sales channels, Rouse has observed a slight bit of underperformance across the broader asset category, with crawler cranes exhibiting the most notable underperformance through the first part of the year.

Further, Rouse tracks an OLV index by crane type. As indicated by the index below, the same patterns hold true across the various cranes types.

Slow growth

After a very strong performance in both volume and return through the auction channel in February, April auction volume showed a meaningful drop off in volume, but showed a bit of return from performance to March.

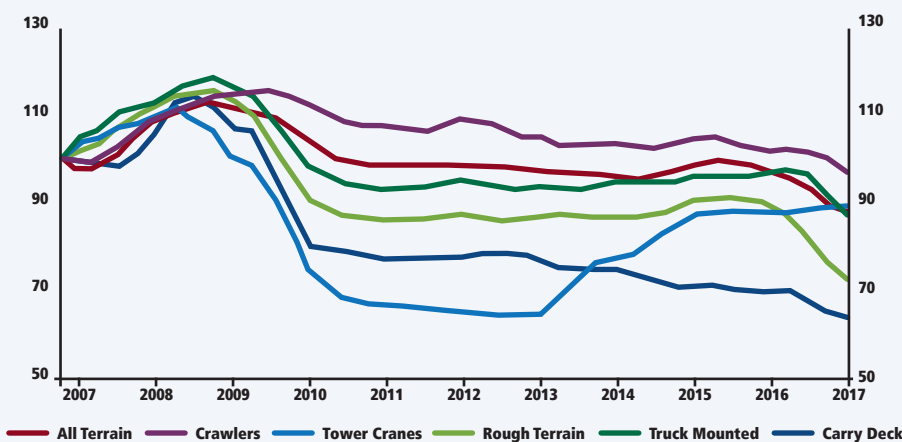
The April 2017 volume was a touch below April of 2016 with the results averaging 0.4% below the Rouse March Forced Liquidation Value (FLV) values.

Units sold in April were less than half of March (~3,600 units sold in April as compared to ~7,800 units sold in March) represented a combined FLV (as of 31 March) of US\$80 million (€71.08 million) and generated US\$79.7 million (€70.82 million) of gross auction proceeds.

Categories of equipment prevalent in general rental fleets (for example, small- and mid-sized earth moving and aerial equipment) as well as heavier equipment categories (for example, large earth moving and mining equipment) both were in line with Rouse prior month values.

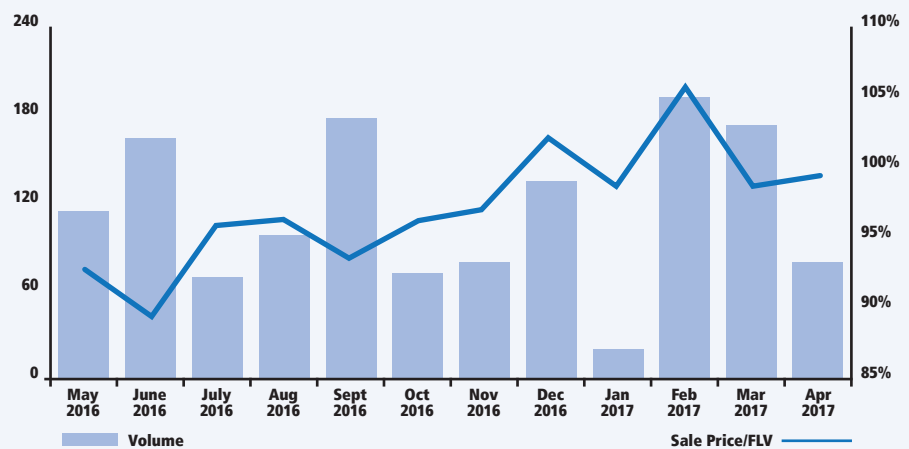
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ROUSE CRANE OLV INDEX, BY CRANE TYPE (DEC '06 - MAR '17)



“ The April 2017 volume was a touch below April of 2016 with the results averaging 0.4% below the Rouse March Forced Liquidation Value (FLV) values ”

AUCTION VOLUME AND RECOVERY RATE (MAY '16 - MAR '17)



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Definitions:

Rouse Forced Liquidation Value Index

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

Forced Liquidation Value (FLV) The estimated gross amount expressed in terms

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

Rouse Rate Index

Achieved rental rates relative to January 2011 (when Rouse

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

Physical Utilisation

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



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People news FROM THE WORLD'S RENTAL INDUSTRY

■ UK-based Lavendon Group has announced that its group finance director **Alan Merrell** will stand down from his role at the end of June after 19 years at the company.



Mr Merrell will be succeeded by Tom Murray, who joined Nationwide Platforms – part of the Lavendon Group – as finance director in 2016.

The company said that Mr Merrell had been instrumental in guiding the organisation through major changes and challenges across its operating territories and geographies. It added that he was well respected throughout the rental industry for his pragmatic approach and experience.

Don Kenny, CEO of Lavendon Group, said, "Alan's departure is most certainly the end of an era for Lavendon Group as he has been a cornerstone of our success story."

■ **Cem Peksaglam**, CEO of Germany-based compact equipment manufacturer Wacker Neuson, has told the company he is not renewing his contract when it expires in August.



A statement from the company said that "following the

successful realignment of the Group's strategy...he has decided to pursue new endeavours."

He has been CEO of the company – which had revenues of €1.36 billion in 2016 – since September 2011.

In that time the company has experienced strong international growth, opening new plants in Brazil, China and the USA.

■ Saudi Arabia-based rental manager **Adel A. Fattah** is looking for new challenges since leaving Byrne Equipment Rental in mid-February.



Mr. Fattah has extensive rental experience in the Middle East, having worked for Caterpillar dealer Zahid Tractor in rental-related roles for 11 years up to the April 2016. He also worked for Egyptian Caterpillar dealer Mantrac in the early 90s.

Mr. Fattah can be contacted at: adelashash@gmail.com

■ Pump manufacturer Xylem has announced two international appointments at its dewatering business, which are effective immediately.

Harry Steyn has been named international rental development

Changes at the top at Bomag

German equipment manufacturer Bomag has announced that Ralf Junker has taken over as president of the company, replacing Jörg Unger.

Mr Junker has worked for Bomag since 1988 and has been a part of the management team since 2001, before taking over as managing director in 2009. He began his role as president on 1 May.

Stepping away from the role, Mr Unger will now take on the role of president of the Fayat Road Equipment business.

The company has also appointed Robert Laux as managing director of Bomag, alongside Ralf Junker and Dirk Woll, the chief financial officer.

Mr Laux joined Bomag in 1997 and has been a member of the management team since 2006. Added responsibilities for Mr Laux will include worldwide production and supply chain management.



Ralf Junker (left) and Jörg Unger (right).

manager, dewatering, and will be based at Xylem's European headquarters in Schaffhausen, Switzerland.

Meanwhile, **Anna Bukvic** has been appointed international marketing communications manager, dewatering, also based at Schaffhausen.



With over fifteen years' experience working with a range of multinational companies, Ms Bukvic will be responsible for driving marketing campaigns to support the rental and sales growth of Xylem's industry-leading Godwin and Flygt brands in strategic dewatering markets.

■ UK-based temporary power provider Aggreko has announced that its chief financial officer **Carole Cran** will step down from her role, after 13 years with the company.



Ms Cran – who acted as chief financial officer for the past three years – tendered her resignation from the company in order to take up the same role for Forth Ports, an infrastructure funds owned company, headquartered in Scotland, UK.

Aggreko's board said it would begin the search for Ms Cran's successor, who will leave the company over the next 12 months, once a handover has been completed.



■ JLG has announced changes in its sales organisation in the Middle East, with the retirement of JLG veteran of 36 years Ewan MacAngus. **Ian Hume** (pictured) will replace him.

Mr MacAngus, director of sales Middle East and Africa will retire at the end of June. He joined JLG in 1981 and worked in South Africa from 1984 to 1986 where he developed JLG's distribution network before returning to the UK in 1987.

Based out of Cumbernauld Scotland he has held various service and sales positions in the company throughout his time with JLG in a number of regions. Since 2008 he has been based in Dubai and has been instrumental in the development of the JLG's presence within the MEA region and their market leading position there.

■ Swepac, the Swedish light compaction and concrete equipment manufacturer, has appointed **Tomasz Walawender** as sales & marketing director export markets.



In his role Mr Walawender will focus on building Swepac's presence among rental companies in Central/Eastern Europe and the Baltic states.

Previously, Mr Walawender headed up Ramirent's Central Europe operations and, prior to that, Dynapac's business in Poland.

New EMEA president for Doosan

Doosan Bobcat has appointed Alvaro Pacini as president of its Europe, Middle East & Africa (EMEA) region. He will begin his role immediately.

Mr Pacini will be responsible for Doosan Bobcat's EMEA business, representing the Doosan, Bobcat, Geith and Portable Power brands.

He joined Doosan Bobcat in 2011 as vice president of sourcing in EMEA, before taking on additional responsibilities and leading its total quality management department in 2013. He then led the company's EMEA operations in 2015.

Previously, Mr Pacini worked for international automotive parts manufacturer Faurecia in Brazil.

The new EMEA president holds a mechanical engineering degree from the Universidade São Francisco, Brazil, which specialises in automotive motors. He also holds an MBA in industrial administration from INPG, Brazil.

A native Portuguese speaker, he is fluent in English, Spanish and French.

Scott Park, president and CEO of Doosan Bobcat, said, "With more than 30 years of global leadership experience, I am confident Alvaro will help us continue to deliver the innovative, quality products and services our dealers and customers have come to expect from us."



Alvaro Pacini.



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