

INTERNATIONAL

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rental

NEWS

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Official magazine of the ERA



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comment

Expecting a busy year

Happy New Year and welcome to the January/February issue of *International Rental News (IRN)*, kicking off what I expect will be another lively 12 months for our dynamic industry. There is much to look forward to in 2015, including the European Rental Awards, which take place on 3 June in Rome, Italy, during the European Rental Association's (ERA) annual convention.

The deadline for awards entries is 20 February, so if this issue has just landed on your desk you still have time to take part in this prestigious and eagerly anticipated market event. The event is a great way to showcase the best that our industry has to offer, and is open to manufacturers and rental companies operating in Europe.

A new award has been added this year - the 'most sustainable rental product' award - and I would encourage any manufacturers reading that may have a suitable product to consider entering. Turn to the news pages for a full break-down of the awards categories and judges, as well as details of how to enter.

Together with the European Rental Awards and ERA convention, other key events starting the rental calendar for 2015 include the Executive Hire Show and The Rental Show, taking place in the UK and US respectively in February, as well as the Intermat construction equipment exhibition. There will be plenty to see for rental buyers, with previews and show guides for these exhibitions featured in this issue.

While this year certainly looks set to be another busy one, respondents to the fourth quarter and full-year ERA/IRN RentalTracker were still rather downbeat on current business conditions at the end of 2014, albeit at least an improvement on the very depressed-looking third quarter results.

Despite high optimism and confidence from some countries, across Europe at the end of last year, less than half of respondents were expecting better business conditions in a year's time. This caution could well be a reflection of the uncertain economic times we find ourselves in again, so we shall just have to wait and see what 2015 holds for our industry. One thing is for sure - there are many opportunities out there for those prepared to be tenacious and flexible.

Enjoy the read.

Helen Wright

Editor, *International Rental News*

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Hitachi Construction Machinery (Europe) launch pad for a new light compaction range of rammers, vibratory plates and rollers. See page 22.



DIARY DATES

2015

EXECUTIVE HIRE SHOW

11-12 February, 2015, Coventry, UK
www.executivehireshow.co.uk

THE RENTAL SHOW

22-25 February, 2015, New Orleans, US
www.intermatconstruction.com

IAPA AWARDS 2015

26 March, 2015, Washington DC, US
www.iapa-summit.info

INTERMAT

20-25 April, 2015, Paris, France
www.intermatconstruction.com

HRIA CONVENTION

28-30 April, 2015, Adelaide, Australia
www.hireandrental.com.au

ERA CONVENTION

3-4 June, 2015, Rome, Italy
www.erarental.org

ERA AWARDS

3 June, 2015, Rome, Italy
www.khl-group.com/events/ire-2015

PLANTWORX 2015

2-4 June, 2015, Bruntingthorpe, UK
www.coneq.org.uk

INTERNATIONAL RENTAL CONFERENCE (IRC)

21 September, Beijing, China
www.khl-group.com/events/irc

ICEF

2-3 November, Amsterdam, Netherlands
www.khl-group.com/events/icef

IronPlanet and Cat Auction Services merge

Online used heavy equipment marketplace IronPlanet is to merge with Cat Auction Services - an alliance of Caterpillar and several of its independent Cat dealers.

IronPlanet said it had over a million registered users, while Cat Auction Services - which was started in 2008 to give Cat dealers another distribution channel for used equipment sales - had a strong customer base. The companies would offer live and online auctions.

Ironplanet chairman and CEO Mr Owens will be chairman and CEO of the combined entity, and the company will continue to be headquartered in Pleasanton, California, US.

HSS to launch IPO

HSS Hire Group, based in the UK, has announced it will proceed with an IPO (initial public offering).

The company said it intended to raise £103 million (€133 million) from its listing on the London Stock Exchange, providing greater working capital to drive growth in the business.

Admission to the stock exchange is set to take place in February 2015. Following that the company will be eligible for inclusion in the FTSE UK indices.

There is then expected to be a free float of at least 25% of the company's share capital. An over-allotment option will allow 15% more shares than originally planned to be made available by the main shareholders and Standard Life.

During the group's last financial year, ending 27 September, revenues grew 17% year-on-year, while adjusted EBITDA was up 19% compared to the same period. HSS's market share in the UK increased from 3.6% to 4.7% during that time, said the company.

In connection with the IPO, HSS also announces the appointment of Neil Sachdev as deputy independent non-executive chairman, and Amanda Burton and Douglas Robertson as independent non-executive directors.

Chris Davies, HSS chief executive officer, said "A public listing will put the business on the best footing to maximise our potential as the recovery in our markets gains momentum, enabling us to scale our model faster and accelerate our growth."

Deadline for 2015 European Rental Awards

The deadline to enter this year's European Rental Awards is Friday 20 February. The 2015 event will be held on Wednesday 3 June in Rome, Italy, and entries are now being accepted.

As well as a Lifetime Achievement award, there are four categories:

- Large Rental Company of the Year (turnover over €15 million)
- Small/Mid-sized Rental Company of the Year (turnover under €15 million)
- Most Sustainable Rental Product (product launched in late 2013 or during 2014)
- ERA/IRN Rental Person of the Year

The awards ceremony will take place on the evening of the first day of the European Rental Association (ERA) annual convention. The convention is being held on 3 and 4 June at Hotel Melia Roma Aurelia Antica.

The judging panel for the prestigious awards includes senior representatives from rental companies, manufacturers and rental associations in Europe, plus two members from the award organisers - the ERA and KHL Group, which is the publisher of IRN. The judges, who will meet in Brussels, Belgium, on 18 March, 2015, to determine the shortlisted companies and winners, are:

- **Xavier du Boÿs** (CEO, Kiloutou, France)
- **Marzia Giusto** (CEO, Nacanco & President, Assonolo, Italy)
- **Nicolas Guigon** (Rental & Used Equipment Manager - EAME, Caterpillar)
- **Vesa Koivula** (ERA President & CEO, Cramo, Finland)
- **Murray Pollok** (Managing Editor, IRN)



- Non-voting chair of the meeting: **Michel Petitjean** (Secretary General, ERA)

The awards are open to any company operating in Europe, and companies do not have to be members of ERA to enter.

For more information, including award criteria and entry forms, please go to:

www.khl.com/rentalawards

Construction equipment rental company and distributor Mtandt used the bC India exhibition in December to introduce a range of materials handling equipment to the Indian market. Its stand at the show featured a Magni telescopic handler, Unic straight-boom crane and PM knuckle-boom crane.

The company, which has focussed on the access sector, feels there is potential for more sophisticated lifting and materials handling equipment in India, a country where domestically manufactured pick & carry cranes have traditionally dominated the lighter end of the lifting and handling sector.

Mtandt managing director, Rakesh Modi said, "People are looking for safety more and more, plus labour costs are not as low as they once were."

HIGHLIGHTS

■ Expansive US-based portable storage rental company Mobile Mini has acquired an unnamed portable storage business with a fleet of approximately 550 units in Buffalo, New York, US, for an undisclosed price. This deal followed a string of investments including the US\$450 million (€361 million) purchase of Texas-based specialty containment provider Evergreen Tank Solutions.

■ Ashtead's US operation Sunbelt Rentals has expanded into Canada with the acquisition of general tool business GWG Rentals for £16 million (€20 million), plus up to £4m (€17.6 million) payable over the next three years depending on profitability. Based in western Canada, GWG has six outlets offering aerial platforms; compaction, material handling and earthmoving equipment; generators and heaters, and lawn and garden rentals.

■ AFI has strengthened its presence in the UK with the acquisition of Altitude Access, an East Midlands-based company with a turnover of £1.6 million (€2.1 million), a rental fleet of 180 powered access machines and a depot. The Altitude Access brand will be incorporated into the AFI brand.

■ Contractor Balfour Beatty has announced three-year rental equipment agreements with A-Plant, Speedy Hire, Nationwide Platforms and VP. Andy Ormerod, managing director of Balfour Beatty Plant and Fleet Services said, "By working in close partnership with these industry leading providers of plant and equipment, Balfour Beatty will experience a step change in service."



Tsurumi sets up French rental company



Pump manufacturer Tsurumi Europe has established a new rental operation in Strasbourg, France.

The move came as the company acquired its Belgian distributor and rental company Marine Motors & Pumps (MM Pumps).

Tsurumi said the new wholly-owned French rental company - Tsurumi Pompes Location (TPL) - would focus on the country's rental potential and grow its presence in the market.

(Back) MM Pumps managing director Johan Dekker; (front left) Daniel Weippert managing director at Tsurumi Europe; (front right) TPL head of operations Gaetan Beaulieu.

The manufacturer has been present in the French market for years through its subsidiary CE2A-Tsurumi France, located in the south of France. The company said it would now serve the market directly for both customer's distribution and rental requirements.

Tsurumi said TPL would stock a large number of pumps and accessories, and employ a number of qualified pump rental professionals. It added that the MM Pumps operation would continue to sell and rent pumps for the Belgian market, but would also be

involved in the French rental market through cross-renting to TPL for French customers, as well as one of the maintenance centres.

TPL head of operations Gaetan Beaulieu said, "The French dewatering pump rental market is a major area where we see the main submersible pump players.

"Now is the perfect time for Tsurumi to establish its own rental operations to cover unreached rental customers and capitalise on growing market potential."

Rental special reports

IRN produces a range of special reports each year that offer more detailed analysis of the global equipment rental industry.

The most recently published special reports include *The Rental Report 2014* - an annual overview of the worldwide rental market, including a comprehensive supplier directory.

The *Interviews on Rental* special report is also now available - a compilation of over two years of interviews from IRN with leading figures from the industry.

Other special reports produced by the magazine last year includes the

IRN100 Five-Year Report, compiling five-years of IRN100 survey rankings; and the *2014 Extended IRN100 Toplist*, which takes a more detailed and analytical look at last year's ranking.

A new version of this report will be published this year after the 2015 IRN100 ranking has been compiled in the June issue. Meanwhile, other 2015 special reports to look out for include the *Rental Attitudes* report, which will survey contractor's attitudes; and the *Rental Management* report, which will compile rental management articles from IRN.

More details about the special reports can be accessed on the KHL.com Information Store at www.khl-infostore.com



Scan the QR code to purchase *The Rental Report*



Ramirent and Zeppelin secure Fehmarnbelt joint venture

Rental companies Ramirent and Zeppelin said they had successfully finalised a joint venture to bid to combine resources to serve cross-border Fehmarnbelt tunnel construction project.

The companies first outlined their bid to support construction of the world's longest immersed tunnel last summer.

Linking the Danish and German coast, the €6.2 billion Fehmarnbelt Fixed Link is planned to stretch 18 km, consisting of a four-lane motorway and a double-track rail line. Construction is scheduled to start this summer, with completion aimed for 2021.

The companies said their joint venture - Fehmarnbelt Solution Services - would offer a 24/7 service on site with rental depots on the Danish and German side. Products and services offered would include modular space, equipment rental services, maintenance and repair, logistic and safety management and consulting, temporary infrastructure, energy and climate solutions, facility management services, access control, waste management as well as training.

The companies said that, typically, the potential equipment rental volume shared among the rental companies servicing the project amounted to 1% to 3% of the total construction volume.

IRN Rental Share Index

COMPANY		SHARE PRICES			% change
		Start date 11/1/06	Previous mth 30/10/14	Current mth 14/01/15	
Acces Industrie (France)	€	0.47	2.50	2.10	-16%
Aggreko (UK)	£	2.75	15.07	14.86	-1.4%
Ashtead Group (UK/US)	UK£	1.83	10.20	10.42	+2.2%
Boom Logistics (Australia)	A\$	3.70	0.14	0.13	-7.1%
Cramo (Fin)	€	13.0	11.66	12.25	+5.1%
GAM SA (Spain)	€	8.00	0.23	0.23	0%
GL events (France)	€	29.96	15.70	15.79	+0.6%
H&E Equipment	US\$	-	38.35	20.64	-46%
Kanamoto	Yen	-	3910	3140	-19.7%
Lavendon (UK)	UK£	2.20	1.85	1.69	-8.6%
Mobile Mini (US)	US\$	46.2	42.45	38.91	-8.3%
Ramirent (Finland)	€	23.43	6.38	6.54	+2.5%
Speedy Hire (UK)	UK£	8.32	0.61	0.77	+26%
United Rentals (US)	US\$	24.9	106.37	85.81	-19%
IRN INDEX		100.0	297.7	285.5	-4.1%

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

■ JCB will launch a range of 1 to 10 tonne capacity site dumpers in February thanks to a new OEM supply agreement with Terex. The manufacturer said the range would comprise 1, 2, 3, 3.5, 6, 9 and 10 tonne capacity machines available from JCB dealers from February 2015 and to be progressively rolled out to JCB dealers around the world. The official launch will be at the 2015 Executive Hire Show in Coventry, UK in February. The dumpers are being manufactured in the UK on JCB's behalf by Terex GB.

■ Kobelco Construction Machinery has announced plans to build an excavator factory in Spartanburg, South Carolina, US. Site preparation is due to start in April and the first machines are due to be produced in January 2016. The move follows the dissolution of Kobelco's 10-year joint venture with CNH at the end of 2012. Kobelco re-entered the US market on its own in 2013, selling machines built at its factory in Itsukaichi, Japan, through a newly appointed dealer network.

■ Safety at height specialist XSPlatforms will open four new offices in the first half of 2015. The company said the expansion was a result of increased demand for its products in Asia, the Middle East and Australia. In Asia there will be new offices in the company's two largest markets - India and China. Meanwhile, an office will also be opened in Kuwait, in addition to XSPlatforms' existing offices in Dubai and Qatar. An additional new Australian office will be XSPlatforms' first in that continent.

RENTAL ROUND-UP

■ Power rental company APR Energy has said there can be no certainty that it can secure government approvals needed to restart a 450 MW project it has been forced to suspend in Libya. In November 2014, the company suspended operations in the country awaiting parliamentary ratification of a gas turbine and diesel module power contract - one of its largest projects. It said the suspension would have a material adverse impact on its 2014 financial performance, with a charge of up to US\$40 million (€32.8 million) expected as a result.

■ Finnish rental company Ramirent has issued a more downbeat full-year 2014 outlook, and said it expected to be hit by €4 million in restructuring costs due to geopolitical uncertainty combined with a rapidly declining oil price. President and CEO Magnus Rosén said, "Restructuring measures and write-downs are expected to have a €4 million negative effect on fourth quarter 2014 earnings before interest, taxes and amortisation (EBITA)."

■ Equipment rental company and dealer Titan Machinery saw revenue from rental increase 7.69% year-on-year to US\$26.6 million (€22.6 million). However, overall third quarter revenue declined 16.1% to US\$493.1 million (€420 million). Chairman and CEO David Meyer said the decline was mostly due to the agricultural side of business for Titan. "For our construction segment, we reported another quarter of improved financial results, including same-store sales growth over 10%, higher equipment margins and an improvement in pre-tax income," he said.

■ UK-headquartered rental company Ashtead Group, the parent of Sunbelt and A-Plant, said it forecast full-year 2014 results to exceed its previous expectations after reporting a strong first half. The company said underlying rental revenues for the six months ended 31 October, 2014, were up 24% year-on-year to £896 million (€1.13 billion), while underlying operating profit jumped 34% to £295 million (€373 million).

MARKETS

■ Construction output in Germany rose towards the end of 2014, but at a reduced rate, according to the Markit Price Manager's Index (PMI). The study revealed that levels of new orders had declined, as companies looked to reduce their employee base amid a challenging European economic backdrop. While there were encouraging results from the homebuilding sector, a rise in inflation contributed to purchasing activity within the overall market being unchanged since November. The performance rating index level was 50.5, down from 53.5 in November (50 points indicates growth).

■ By 2014, the construction market in Eastern European was estimated to have a 20% share of the total European market in financial terms, with around €300 billion spent on construction. The EECFA said that in the last 10 years, the region had managed to double its share. Almost uninterrupted growth in the two biggest markets, Russia and Turkey, was said to have contributed at one end, with a shrinking overall market in Western and Central Europe since 2009, at the other end.

■ Construction spending in the US was up 3.3% in the 12 months to the end of October, compared to the same time last year, at US\$971 billion (€827 billion). This was a 1.1% increase from the 12-month rolling total to the end of September. The year-on-year increase was driven by the private non-residential sector, which was up 6.4% compared to a year ago. However, this component of construction was down 1.0% compared to the previous month.

PODCAST

■ The podcast accompanying this issue of *IRN* will be available shortly after publication on KHL.com - go to www.khl.com/videozone/podcasts/ and search for *IRN* to see the latest recording as well as the archive.



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The pace of change

Kevin Appleton **discusses** the impact that technology has had on service industries and the rental sector in particular.



I can still vividly remember that when I started my first, real, post-education job I was allocated a desk with a phone, an in-tray and an out-tray. The post trays were cleared four times per day and anything that needed typing would take at least 24 hours to leave the building as it had to go via an internal typing pool.

That was the sum total of business information technology available to me - although if something was super-urgent you could take it to a telex operator who lived in a special room and they would type your hand-written message into the telex machine.

When I went into operations management (in logistics) it was in a world where measurement of volume and quality of service was based on sampling of individual loads and individual contracts. Individually tracked activities were rare, manual and commanded a significant price premium.

Now even if this sounds like a description of Roman times, it's important to remember that things still got done, most businesses made money and customers were more often than not happy with the level of service they received. Which brings me to the question "what has technology actually done for service industries in general and the rental industry in particular"?

One thing it *hasn't* done (at least not yet) is to change human nature. The reason things, by and large, worked before information technology became ubiquitous, is because most people do want to perform the job they're given to do as well as they're able to do it under the constraints in which they operate.

So, technology is *not* necessary to get the majority of things done to an acceptable standard most of the time.

Performance

Technology has, however, helped management to see the effects of defective performance, and to correct that defective performance much sooner.

With modern technology, companies can now see on the same day if they have a spike in equipment breakdown in a

particular area and then respond to the root cause of that problem the day following.

At a more granular level we can see if the truck despatched with the customer's equipment is stuck in traffic and therefore likely to be late on site - giving us the opportunity to automatically alert the customer with a text and not waste their time.

This opportunity to spot and actively manage customer-affecting defects is certainly a huge step forward from where we were thirty, or even ten, years ago.

We can also see, at a glance, if the piece of equipment a customer wants is due to become available from the ending of an existing hire, rather than leafing through mounds of T-cards - so we are less likely to miss sales opportunities.

We can then use our huge database of previous transactions to build dynamic pricing systems to ensure we are offering logical, but profitable pricing to customers based on their individual needs and our fleet's availability.

Challenge

Our challenge is that across much of the industry, we are still not doing any of these things. In many cases we have simply used IT to speed up the process of counting transactions compared to those old, manual sampling systems and we are recording the same old operational steps, but on screens rather than T-cards or pieces of paper.

We might have saved ourselves a bit of time, or at least some paper, compared to the old ways but we haven't really changed the customer experience, because we're still prisoners of the "old ways" in our thinking.

80% plus of things we do will normally go well, because our people naturally want to do them well. The correct use of technology, it seems to me, is about preventing, or reacting rapidly to, the 20% that causes irritation, inefficiency, loss of pricing discipline or outright danger.

The big challenge is how to find technology-aware managers who can also think about how operational flaws occur, how to spot them and then how to prevent them.

The best IT system in the world won't do that thinking for us, but if we don't do it, be sure that someone else will do it and we'll risk being the victim.

IRN

"Technology has helped management to see the effects of defective performance, and to correct that defective performance much sooner."

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

Changing Horizon

Euan Youdale **spoke with the general manager of China's biggest AWP rental company Zhang Chunyu to find out how the sector is set to change and grow.**

It is revealing that a company established only four years ago can lay claim to having the largest fleet of aerial platforms in China - 1400 units at the time of writing. That is even more surprising when you consider that Horizon Equipment began in 2011 not as an access player but by renting out road building equipment, to which it then added shoring products such as hydraulic struts. It was in 2012 that the first aerial lift was added to the fleet. Since then, Horizon has also entered the power generation and industrial forklift rental market.

According to Chunyu Zhang, Horizon's general manager, there are only five access fleets of more than 500 units in China. Even so, around 80% of active AWP's in the country are in the hands of rental companies, he says, most of which are small, local outfits with few machines.

Horizon's move into rental in 2011 came as a result of the experience of its parent company, Far East Horizon, in the financial leasing market. Far East Horizon's clients included construction companies which were using leases to acquire equipment. It was a relatively short step from that to establishing an equipment rental business, initially focussing on the road building and shoring products that its clients were using, but then adding access equipment.

"We could see that companies have made [good returns] in the well developed markets so that's why we entered the AWP sector," says Mr Chunyu, who worked with Far East Horizon for eight years before assuming his leadership role at Horizon. Mr Chunyu spoke through a Horizon company translator.

Now with 13 branches across China, the total fleet comprises 1700 units - the 1400 aerials, 200 asphalt pavers and compaction machines, and the balance in generators and forklifts.

Of the access equipment in its fleet, 80% is made up of scissors, with the majority of the rest being booms. Horizon chooses to invest in JLG and Genie machines, with the majority - 1150 of them - coming from Genie. It has about 50 JLG units, all of which are booms. The fleet includes one each of the two biggest booms in the world: the 180 ft (55 m) Genie SX-180 and the 185 ft (56 m) 1850SJ from JLG. Vertical masts and spiders are the likely next addition to its fleet.

Research

Horizon's launch followed more two years' research into international rental markets, including visits to Singapore, Japan, Hong Kong, Germany and, specifically, United Rentals in the US.

With this research in mind, Horizon concluded that it was the right time for China. "First, China has been developing rental for more than 20 years, so it now understands the concept of rental. Second, the use of these types of machines is growing as people use more-and-more equipment rather than human labour, and third, China is attaching great importance to safety on worksites and it leads to people using AWP's rather than scaffolding." An additional factor, says Mr Chunyu, is China's growing prosperity: "We are rich people now."

He adds that there is "positive influence" from outside the country that is helping to



develop safety. For example, Western contractors insist on certain types of equipment being used on their worksites in China, such as on the Disneyland Shanghai project now under construction. "And there are similar foreign funded projects that have been around and have influenced the way we do work."

The company is making the most of China's transition by growing other parts of its business too, notably its paving equipment fleet. "The Chinese road building equipment rental industry is in good shape after years of development; however, most of the rental companies are small. So we want to be the bigger one with strong industrial influence."

The sector is not without its challenges, however, with tough competition and low pricing affecting it for the last couple of years. "But, from a long-term view, the market is still promising. We will expand our paving equipment fleet step-by-step, and we aspire to build our own brand as a rental company which leads the market in China."

Rental

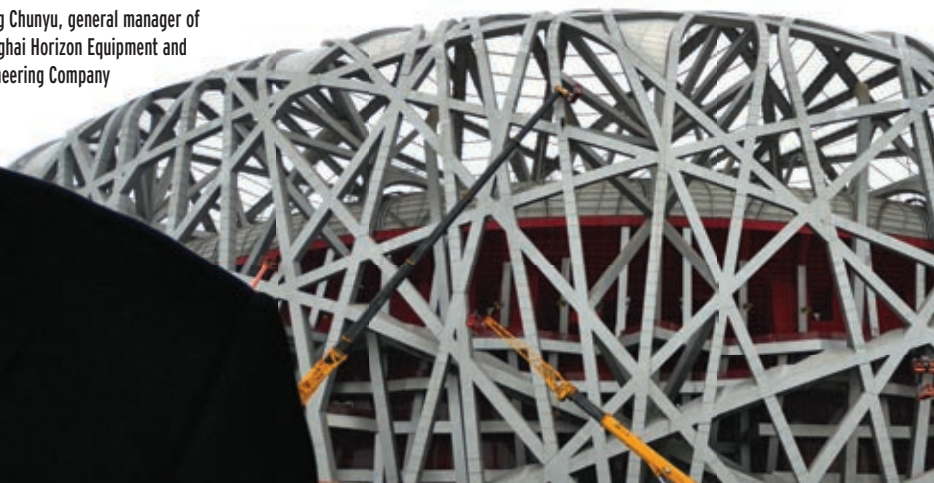
The company is always on the look-out for additional rental segments, although Mr Chunyu intends to keep an eye on product trends and customer demand before making any new investments.

As previously mentioned, around 80% of access equipment in the country is owned by rental companies. According to Mr Chunyu end users are found in the shipyard and construction industries - the former being the first customer of AWP's in China.

"With the development of rental companies, more construction companies will prefer to rent rather



Zhang Chunyu, general manager of Shanghai Horizon Equipment and Engineering Company





Road building (compaction roller and a paver) machinery from Horizon's 200-strong fleet



Horizon took delivery of the first 185 ft (56 m) working height 1850SJ Ultra Boom in China. The company's president Jiayin Wang and JLG Industries' president Frank Nerenhausen marked the occasion at Bauma China 2014



Horizon was employed to help build the Shanghai World Expo Exhibition & Convention Centre

than to purchase. The mind-set of people is changing and now more people prefer to rent." There is a long-held belief in China that states that ownership of goods is preferable to leasing or renting, but the recent slowdown in China's economy is having a positive impact on attitudes; "when people look at their accounts they would prefer to rent than buy."

So, how will this translate into growth? "It's difficult to say, but some people think there will be 50000 to 60000 AWP's in China in the next three years." This could lead to a total fleet of 500000 units in China by the time it reaches maturity, although Mr Chunyu points out this is based on an estimate by a major manufacturer.

The truth is, it is difficult to make an accurate estimate, particularly when it comes to putting a

timescale on reaching the stage of full development. "The economy here is so changeable - fast then slow - it's difficult to say."

He adds, "We will not see explosive growth in the market because as it develops, the equipment volume may not increase at such a fast speed due to greater competition and lower rates of return."

Operator challenge

Challenges also lie in finding operators. "They are subject to intensive workloads and harsh working environments," says Mr Chunyu. "As the population structure changes in China, young people become reluctant to engage in this profession."

He says Horizon is leading the way in terms of improving working conditions, and feels effective operator training is important. "We have perfected a system of training and evaluation. Operators can carry out work only after professional training and being approved through evaluation."

The company is also applying for IPAF membership, "and we are looking forward to further cooperation with the organisation."

Mr Chunyu puts a value of CNY1.2 billion (€164 million) on Horizon's fleet and believes there will be 30% to 40% fleet growth in the future, purely because the AWP market in China is on a greater growth trajectory than its other products, which are already well established in China.

Horizon's annual revenue is about CNY300 million to CNY400 million (€40 - €55 million), and grew by 50% growth last year. "We will certainly grow in the future but it will perhaps be 40% next year [2015] and 30% the year after that."

"It's natural for us to grow at a fast rate because we are a young company that has just invested in lots of equipment, but this will slow down."

"Maybe the market does not need that much immediate demand from rental, but sure there is a demand in rental in general and perhaps it's about 30% up a year from now on."

The company's new big booms will exploit some of those rental opportunities, among them a major bridge project in central China and an export centre in central Shanghai.

Investments

Expanding on the company's purchasing policy, Mr Chunyu says they have not yet invested in platforms produced by Chinese manufacturers, preferring to use established Western suppliers until the local product is more proven.

"However, we have heard from certain parts of the market that they are okay to use, but we have not tried them. And this is from a short-term perspective; I think they will have the chance to prove themselves, and the construction market is so huge in China that some of those construction companies will choose to invest in them. Also small scale rental companies with less cash will invest in them"

Summing up general rental Mr Chunyu says China holds great promise. "From a long-term view, the general rental industry in China has a broad potential due to the fast economic development and the rising awareness in safety. From a short-term view, the wider economic situation and the huge influx of construction equipment [before 2012 as a result of the massive Chinese stimulus programme] have hindered development."

The economic slowdown has impacted the construction market, and this is leading Horizon to prioritise its capital investment in aeriels, power generators and industrial forklifts - products that lend themselves to non-construction sectors that are less impacted by the slowdown. Even so, it will continue to invest in the road building and shoring fleets as well.

In fact, Horizon's investment in its five different product groups is also providing some kind of protection by diversifying its customer base: Mr Chunyu says that few of its customers rent more than one of its product categories.

Diversified customer base and an increased focus on non-construction markets: that's a formula that many rental companies in the West would recognise. China's rental sector may be young, but it is accelerating through the growth phases. **IRN**



One of Horizon's Genie booms during the construction of the Beijing National Stadium, commonly known as the Bird's Nest

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Gaining ground?



As far as current business conditions are concerned, sentiment at first glance seemed to have improved in the fourth quarter ERA/IRN RentalTracker survey. Indeed, 31.9% of overall respondents reported improving conditions and 23.5% reported deteriorating conditions, resulting in a positive balance of +8.4% of respondents.

While this is undoubtedly better than the +1.7% balance at the end of the third quarter, the last survey was notably more downbeat than the rest of the year. This makes any improvement in fourth quarter sentiment paint perhaps an unrealistically rosy picture by comparison.

Indeed, the balance of opinion for current business conditions at the end of the second quarter of last

After a downbeat third quarter, sentiment picked up to some extent in the final three months of 2014, but caution still reigns.

year was 32.5%; demonstrating that fourth quarter sentiment is still far off levels that we have seen in the recent past.

Continuing the trend of previous quarters, the UK consistently topped our charts or came a close second on every survey question. This reflects the generally better GDP growth performance of the UK economy and an associated upturn in building activity - particularly housing - that is having a positive impact on the rental market.

It is worth making the point that we get more responses from the UK than any other country, so positive results in the UK skew the results for the whole of Europe. However, the proportion of UK results in the total survey has not changed significantly (UK respondents tend to represent between 10% and 15% of overall survey responses), so we are recording broadly like-for-like changes between quarters.

The UK was joined by Nordic countries and Germany in fairly consistently beating the European average for most survey questions, while - generally speaking - respondents from France, the Benelux, multinational companies and Italy tended to register below the European average for the fourth quarter survey.

Q4 Growth

Overall, 40% of all respondents reported year-on-year growth in the fourth quarter, compared to 39% in the third quarter. The UK came top with 77%, up from 73% in the third quarter, followed by Germany and the Benelux. The biggest faller, however, was the multinational sector, where just 8% of

TABLE 1

Optimism

PERCENTAGE FORECASTING BUSINESS TO BE 'BETTER' OR 'MUCH BETTER' 12 MONTHS AHEAD (last quarter results in brackets)

✓ UK	82%	(64%)
✓ Nordic	67%	(56%)
✓ Russia	50%	(NA)
✓ Italy	44%	(14%)
✓ Germany	43%	(75%)
✓ All Europe	43%	(45%)
✓ Spain	40%	(33%)
✓ Benelux	37%	(56%)
✓ Multinationals	34%	(45%)
✓ France	15%	(32%)

respondents reported growth, down from 45% in the third quarter.

In fact, sentiment from the multinational sector slipped almost across the board compared to the last survey, with only employment intentions and utilisation trends showing improvements from the third quarter, albeit marginal.

Multinationals also remain among the least optimistic looking ahead a year - only French companies had fewer respondents forecasting 'much better' business conditions 12 months from now.

French respondents were not only the most downbeat on conditions in a year's time, but at

The survey

In total approximately 120 companies in Europe responded to the ERA/IRN RentalTracker survey for the fourth quarter of 2014. The survey was carried out at the end of December and start of January.

Our thanks to all the companies who participated and to the following organisations which helped distribute the European survey to their members and contacts:

- Assodimi (Italy)
- ConfalQ (Spain)
- Construction Plant-hire Association (CPA) (UK)
- Danish Rental Association
- DLR (France)
- The Association of Finnish Technical Traders
- Hire Association Europe (HAE) (UK)
- Norwegian Rental Association
- RusRental (Russian rental consultant and training organisation)
- Verhurend Nederland (Netherlands Rental Association)

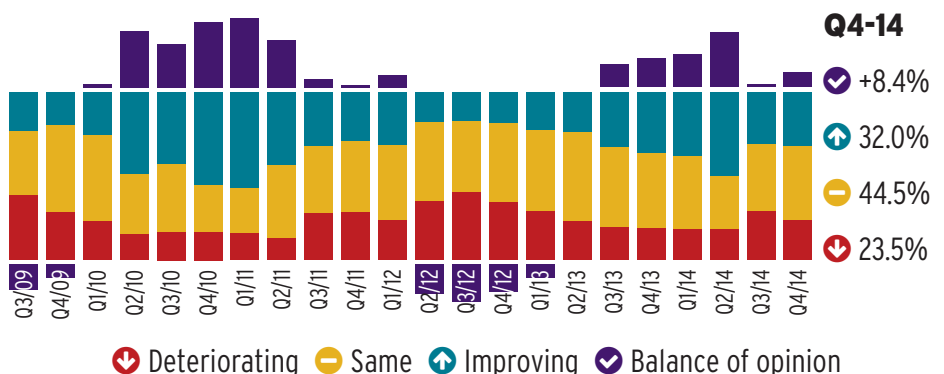
The RentalTracker for Europe is a joint venture between IRN magazine and the European Rental Association (ERA). If you have suggestions about how the survey could be improved, then please contact the ERA on ERA@erarental.org or Helen Wright, IRN Editor, at helen.wright@khl.com

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FIGURE 1

Europe: Business conditions now



-62%, also scored the lowest balance of opinion on current business conditions in the fourth quarter - deeper than the balance of -40% seen in the third quarter.

Investment

Meanwhile, there were some strong gainers when it came to investment sentiment - topping the table of respondents expecting to increase investment by over 10% in 2015 were Nordic companies, with 80% stating that this was the case, a big rise compared to the 38% in the third quarter.

The UK came second on this question, with 48% of respondents planning on upping investment by over 10% in 2015 (after the higher levels of investment already seen in 2014), while the European average stood at 31%. Nevertheless, the overall positive balance of respondents expecting to increase fleet investment in 2015 stood at +10.6% - this is actually its lowest level since the third quarter of 2013.

Looking at forecasts for 12 months' time, the most upbeat set of respondents came once again from the UK, with 82% forecasting business to be better or much better a year down the line. This represented an improvement on last quarter's 64%.

Nordic, Italian and German respondents also beat the European average for this metric, which stood at 43% for the fourth quarter, down slightly from 45% in the last survey.

Respondents from Southern European companies also registered more positive sentiment than in previous surveys. Spain and Italy reported some improvements in the fourth quarter, particularly in time utilisation trends (Spain) and forecasts for 12 months ahead (Spain and Italy).

However, the sample size for Spain remains stubbornly low, so Spanish results should be treated with a degree of caution. And, of course, any improvement in Spain and Italy has to be viewed in the context of a downbeat wider economy.

Overall for Europe, the balance of opinion (the difference in the proportions of respondents seeing positive and negative trends) on time utilisation stood at +22% at the end of the fourth quarter, a big jump compared to the +3.2% that was registered in the last survey, and the second highest level for 2014 as a whole.

Strong sentiment from Germany and the UK skewed this metric somewhat, with 83% of Germany respondents reporting increasing utilisation in the fourth quarter, and 81% of UK companies.

Employment intentions also recovered compared

FIGURE 2

Europe: Expectations for year from now

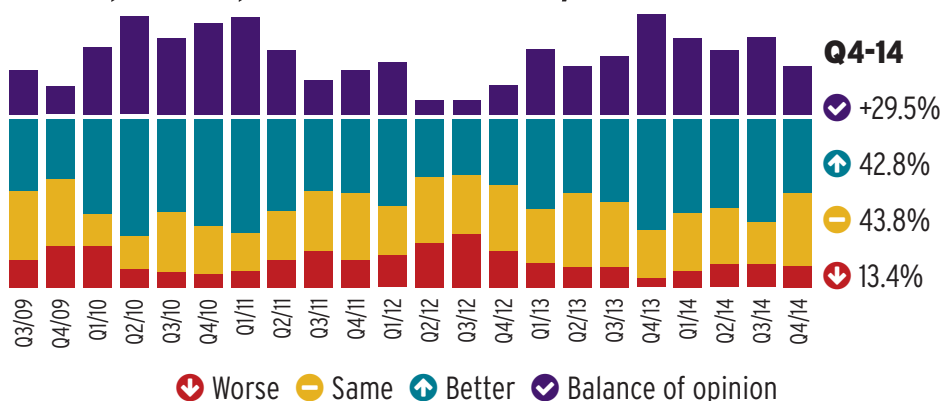
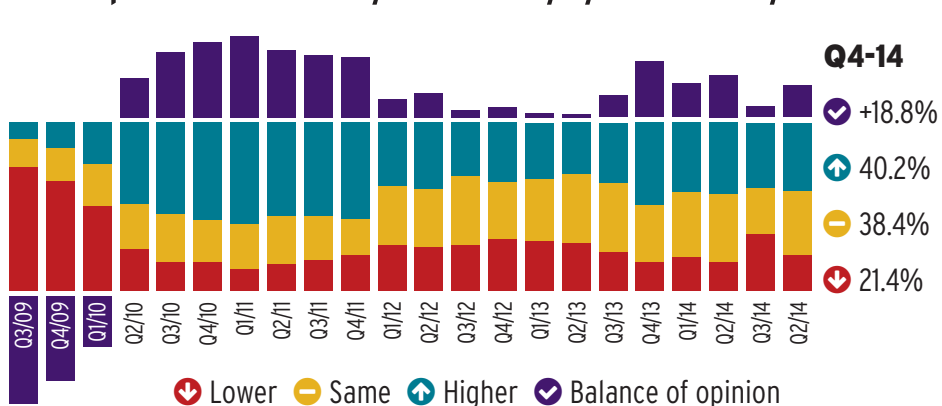


FIGURE 3

Europe: Quarterly activity year-on-year



to the downbeat third quarter, with an overall balance of +14.6 of respondents saying they expected to increase their number of employees in the next quarter. However, this was still the second-lowest balance of opinion on this question for the year 2014 as a whole.

Russia

The fourth quarter survey also attracted enough respondents from Russian rental companies to warrant inclusion - albeit still a small sample that should be treated with caution. When it came to

current business conditions, the balance of opinion evened out at 0%, with as many Russian companies feeling conditions were improving as those that felt they were deteriorating.

On other questions, 17% of Russian companies reported year-on-year growth in the fourth quarter, 16% said fleet utilisation was increasing, 80% said they would employ more staff in the next quarter, 50% felt business conditions would improve in 12 months' time and 20% said they expected to increase fleet capital expenditure by over 20% in 2015.

FIGURE 4

Europe: Time utilisation trend

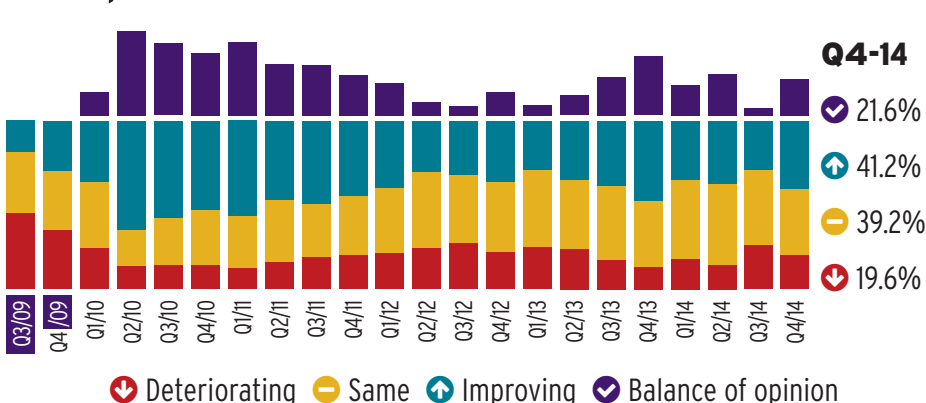
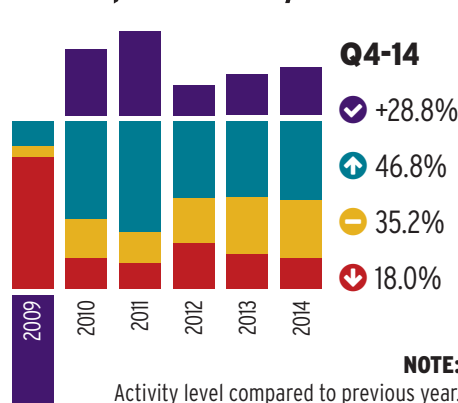


FIGURE 5

Europe: Full-year



NOTE:

Activity level compared to previous year.

TABLE 2

Europe: Regional trends

BALANCE OF OPINION ON BUSINESS CONDITIONS (END Q4, 2014)

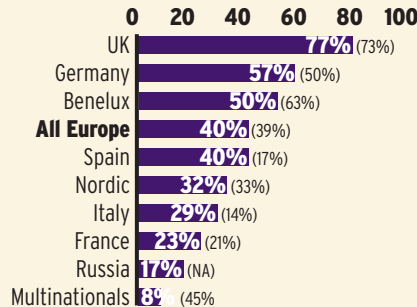
(previous quarter in brackets)

✓ Nordic	+51%	(+6%)
✓ UK	+50%	(+55%)
✓ Italy	+29%	(-72%)
✓ Spain	+20%	(-33%)
✓ All Europe	+8.4%	(+1.7%)
– Benelux	0%	(+33%)
– Russia	0%	(NA)
✗ Germany	-13%	(+10%)
✗ Multinationals	-34%	(0%)
✗ France	-62%	(-40%)

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

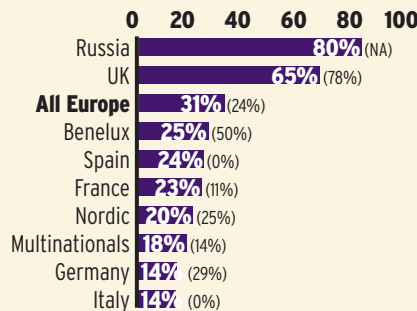
PERCENTAGE REPORTING Q4 2014 GROWTH VS Q4 2013

(previous quarter in brackets)



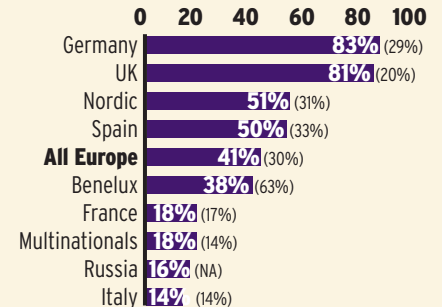
PERCENTAGE WHICH WILL EMPLOY MORE IN Q1 2015

(previous quarter in brackets)



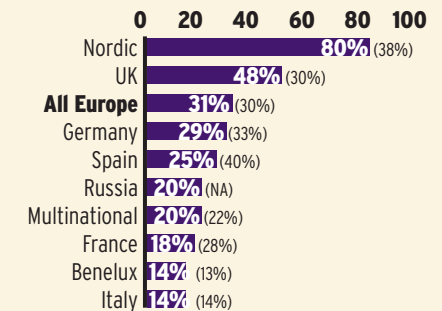
PERCENTAGE WITH INCREASING UTILISATION IN Q4 2014

(previous quarter in brackets)



PERCENTAGE EXPECT TO INCREASE INVESTMENT BY >10% IN 2015

(previous quarter opinion in brackets)



So a broadly positive picture from Russia - contrasting pretty sharply with the bad economic news coming out of the country - but with no recent point for comparison, it is hard to draw any conclusions. We hope to add to our analysis of Russia in the next survey.

Wait and see

Perhaps the renewed sense of economic uncertainty that permeated Europe during the final three months of the year has prompted rental companies in general to opt for a "wait and see" approach as we

enter the New Year. It is telling that, across Europe at the end of last year, less than half of respondents were expecting better business conditions in a year's time.

Economic conditions in the fourth quarter were comparable to those that the market saw at the end of 2013, when it became obvious that a sustained, growth-fuelled recovery in Europe was not materialising.

Undoubtedly a mixed picture has emerged from the fourth quarter ERA/IRN RentalTracker survey, but the results are broadly positive in that they

represent improving sentiment in a volatile climate, albeit skewed to some extent in favour of the UK. It will certainly be interesting to see if this momentum continues into the second quarter, and we hope for a strong response to the next survey. **IRN**

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IRN and its Latin American sister publication *Construcción Latinoamericana* have compiled the LATAM40 ranking of the largest 40 rental companies in this growth industry. CLA editor Cristián Peters reports.

The Latin American rental market is growing steadily. The region is still far from the levels that can be found in markets such as Europe or North America, but certainly the equipment rental concept is becoming increasingly common in the region.

IRN teamed up with its Latin American sister publication *Construcción Latinoamericana* (CLA - which is published in Spanish as well as Portuguese) to take a deeper look at this fast-moving market and compile a ranking of the largest rental companies in the region, based on rental revenues for 2013.

Getting quality data and responses from this fledgling market proved challenging, so this first version of the ranking has been dubbed the LATAM40 - data gathered on the 40 largest rental companies in Latin America.

Notes and thanks

- CLA and IRN are grateful to all those companies and individuals who contributed information for this study, particularly Caterpillar. If you have any comments or would like to be included next year, please contact CLA editor, Cristian Peters at cristian.peters@khl.com, or IRN editor, Helen Wright at helen.wright@khl.com.
- The ranking is based on rental revenues in 2013.
- Entries marked (Est) have been estimated by CLA and IRN.
- * For international businesses, revenues in the table relate to activities in Latin America only.
- ** Estimate based on average statistical relationship between 'Crane Index' from IC50 survey in *International Cranes and Specialized Transport* - a sister publication to CLA and IRN - as well as and rental revenue data collected from IRN's 2014 IRN100 survey (where crane companies appear in both surveys).
- Revenues have been converted using the average value of the currency in 2013.

A deeper look at Latin America



It is a far from exhaustive list, and will become more representative in subsequent surveys, but certainly provides a valuable snapshot of this market that we plan to build on to create a truly comprehensive ranking like the annual IRN100 ranking of the largest 100 rental companies in the world - published in the June issue of IRN every year.

Brazil

The rental industry is gaining ground in Latin America, with Brazil emerging as a clear example. A few decades ago, it was common that construction companies owned 100% of their equipment fleets, but today - according to estimates from rental association the Associação dos Locadores de Equipamentos para a Construção Civil (ALEC) - 30% of the machines are rented.

And it is expected that this proportion will reach 70% in the future, according to Fernando Forjaz, president of the organisation. The executive was optimistic about the performance of the rental market in 2014, and said he expected to see growth of between 20% and 30%.

In fact, according to a recent study ran by ALEC, 48.6% of the companies surveyed experienced an increase in revenue during the first half of 2014 compared to the second half of 2013, and only 22.9% scored knockdowns.

One of the interesting aspects of the rental market is that the industry continues to grow whether the construction sector is depressed or not. Latin American construction companies are migrating towards rental and this is a trend that appears to be irreversible, as they are noticing the advantages of not having a fixed asset or worry about maintenance.

Mexico

An example of the above is Mexico, whose construction industry showed declines during 2013, but even then the three rental companies from this

country that supplied data for the LATAM40 showed year-on-year increases in rental revenues.

Máquinas Diesel (Madisa) had revenues totalling US\$74 million (€64 million) thanks to a 6% increase; Energi had an increase of 9% and revenues of over US\$12 million (€10 million) while GTC Construcciones y Equipos exceeded US\$3.5 million (€3 million) thanks to a 2% increase in sales.

But there is a need to be cautious. Even if the vision in relation to the market is optimistic, it varies from country to country. Colombia has been reactivating infrastructure, coal mining and fuels projects, for instance, while Chile and Peru on the other hand, have felt the impact of lower mining activity recently.

Results

Latin American companies are generally reluctant to provide financial information and therefore it has proven difficult to provide a table that truly represents the industry.

According to ALEC, it could be projected that the rental market in Brazil generates revenues of around US\$8 billion (€6.9 billion). Extrapolating this figure, considering that Brazil represents about 40% of the construction market in the region, it might be estimated that the Latin America rental industry moves about US\$20 billion (€17 billion) annually.

However, it must be taken into consideration that there are countries with very immature markets such as Argentina. According to Biscayne Rent, this country's rental market could reach US\$305 million (€263 million) by 2017.

The 40 companies listed in the ranking produced revenues totalling US\$2.29 billion (€1.98 billion) during 2013, therefore become a representative sample of about 11% of the estimated industry total. These 40 companies handle 430 warehouses in the continent and employ over 15330 people. We hope this gives some broad clarity in relation to the market situation.

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The Top 10 companies in the ranking represented 74.5% of total revenues, reaching sales of US\$1.71 billion (€1.48 million) for 2013. This select group was dominated by companies located in Brazil, with Mills (at 1st position) Solaris (2nd place), Locar Guindastes e Transportes Intermodais (4th) Makro Engenharia (7th) and A Geradora (9th) - companies that, combined, produced revenues totalling US\$1.02 billion (€880 million), representing 59.7% of the top 10.

With two companies featured in the the Top 10, Ameco (6) and SoEnergy (8), representing 15, 1% of

overall revenues, the US was the second dominant country in the ranking.

Chile has also seen significant development in the rental market, and two companies from this country achieved top ten rankings - SK Rental Group (5) and Komatsu Cummins Chile Arrienda (10).

SK Rental is part of Sigdo Koppers group, company with revenues of US\$2.95 billion (€2.54 million) in 2013 - the second largest contractor in the region. SK Rental Group has a history of over 15 years and has offices in Chile, Brazil, Peru and Colombia.

These three countries dominated the first ever LATAM40, with a share of 49.8% for Brazil and 16.9% and 10.4% for the US and Chile, respectively. A single company - UK-headquartered Aggreko - reported rental revenues in the Latin American region that represented 8.5% of the total, and then companies from Mexico totalled 4.8%.

Investment

The 21 companies from the ranking that gave data about their fleet investments in 2013 said they spent

RANK	COMPANY	2013 RENTAL REVENUE IN LATIN AMERICA (USD)	DEPOTS IN LATIN AMERICA	EMPLOYEES IN LATIN AMERICA	FLEET INVESTMENT
1	Mills Estruturas e Servicos de Engenharia	313,705,260	51	2093	49,461,390
2	Solaris	297,472,000	14	400	
3	Aggreko	194,000,000	30	800	
4	Locar Guindastes e Transportes Intermodais**	166,000,000 (est)	12	2750	
5	SK Rental Group	145,000,000	25	600	60,000,000
6	Ameco*	133,000,000 (est)	18		
7	Makro Engenharia**	133,000,000 (est)	8	1520	
8	SoEnergy*	126,000,000 (est)	6	500	
9	A Geradora	109,341,410	19	104	16,676,647
10	Komatsu Cummins Chile Arrienda	89,300,000	11	235	30,253,000
11	Máquinas Diesel	74,476,474	39	2553	184,433,594
12	Finning International	73,116,300	32		
13	APR Energy*	73,000,000 (est)	17		
14	Algeco Scotsman*	54,500,000 (est)	34	560	
15	Irgo Lupercio Torres**	46,500,000 (est)	1	335	
16	GAM Alquiler	45,152,000	19		
17	Sotreg	28,150,650	11	45	12,702,690
18	Tecmaco Integral**	26,500,000 (est)	5	200	
19	Emeco	24,289,270	2		
20	Estaf Equipamentos	21,148,350	10	330	17,389,657
21	Auriga**	20,000,000 (est)	3	150	
22	Gecolsa	18,756,000	5	72	13,700,000
23	Entergi	12,056,086	5	80	750,000
24	Maxlift Locadora de Equipamentos	9,092,606	1	75	779,843
25	Transportes Montejo	8,557,269	2	810	10,473,260
26	Corporación General de Tractores	7,991,372	4	20	9,618,146
27	Transportes Carvalho	7,275,896	2	350	2,013,818
28	García Vega	5,350,000	5	360	642,000
29	Maquinaria y Tractores	5,185,404	3	15	
30	SimmaRent	4,000,000	4	60	1,100,000
31	Tecbarragem Construcoes e Comercio	3,908,520	1	80	
32	GTC Construcciones y Equipos	3,500,010	2	35	
33	IIASA	3,500,000	6	25	2,500,000
34	Maquina Solo	2,531,316	2	23	1,648,558
35	Tecpar Comércio e Locacao de Equipamentos Eireli	1,478,233	1	16	
36	GSA Rental	1,285,200	2	14	8,262
37	Monelca	1,111,853	12	42	480,000
38	Formeq Rental Locacao de Equipamentos	910,565	1	24	163,901
39	Biscayne	800,000	4	60	2,750,000
40	Brasdone Represenacao e Locacao***	4,653	1	2	
TOTAL		US\$2.291 billion	430	15338	417,544,766.9

* Figures for Latin American operations only ** Figures estimated based on relationship between rental revenues and size of crane fleet - see notes on first page

*** We recognise that Brasdone is not a major rental company in the region, but wanted to include it in response to its support for the ranking in providing data

US\$418 million (€361 million). The biggest reported investment was made by Mexico's Madisa, which spent more than US\$184 million (€ 159 million, 45.6% of total) adding over 100 earthmoving machines to its fleet, as well as 420 different types of equipment.

Secondly, SK Rental Group also expanded its fleet with 100 earthmoving machines and 600 pieces of smaller equipment, while Mills invested nearly US\$50 million (€43 million) in over 1200 aerial work platforms. These three companies accounted for over 70% of all investments for the LATAM40. **IRN**

Support the LATAM40 ranking in 2015

Construcción Latinoamericana and *International Rental News* will launch a new campaign to make this top list again in 2015 - and we hope to expand it to include more companies for a more representative sample. We hope companies will take advantage of this tool, and help us promote making the rental market an increasingly transparent and strong industry in this region. The more data we can gather, the more accurate the picture we can develop of this dynamic and fast-growing industry. We are hugely grateful for your support.

HEAD OFFICE	COUNTRIES OF OPERATION IN LATIN AMERICA	TYPE OF RENTAL	WEBSITE
Brasil	Brasil	Aerial Work Platforms	www.mills.com.br
Brasil	Brasil, Argentina	Construction equipment	www.solarisbrasil.com.br
Reino Unido	Argentina, Brasil, Chile, Colombia, México, Perú, Panamá, Venezuela	Power, temperature control	www.aggreko.com
Brasil	Brasil	Cranes and transport	www.locar.com.br
Chile	Chile, Perú, Brasil, Colombia	Earthmoving, power, AWP, forklift	www.skrental.com
Estados Unidos	Chile, Perú, México, Panamá, Caribe	Construction equipment	www.ameco.com
Brasil	Brasil	Cranes and transport	www.makroengenharia.com.br
Estados Unidos	Costa Rica, El Salvador, Colombia, Brasil, Argentina	Power	www.soenergy.com
Brasil	Brasil	General tools and equipment, earthmoving, power, AWP	www.ageradora.com.br
Chile	Chile	Construction equipment	www.komatsuarriendo.com
México	México	Earthmoving, power, AWP, portable accommodation, forklifts, cranes	www.madisa.com
Canadá	Argentina, Bolivia, Chile, Uruguay	Construction equipment	www.finning.com
Estados Unidos	Argentina, Ecuador, Panamá, Perú, Uruguay	Power	www.aprenergy.com
Estados Unidos	Brasil, México	Portable accommodation	www.algecscotsman.com
Brasil	Brasil	Cranes	www.irga.com.br
España	Brasil, Chile, Colombia, México, Panamá, Perú	Construction equipment	www.gamalquiler.es
Brasil	Brasil	Earthmoving, AWP	www.sotreq.com.br
Argentina	Argentina	Cranes	www.tecmacointegral.com.ar
Australia	Chile	Mining heavy equipment	www.emecogroup.com
Brasil	Brasil	AWP, power, framework and shoring	www.estaf.com
México	México	Cranes	www.auriga.mx
Colombia	Colombia	General tools and equipment, earthmoving, power, AWP and forklifts	www.gecolsa.com.co
México	México	Power	www.entergi.com
Brasil	Brasil	Cranes	www.maxlift.com.br
Colombia	Colombia, Venezuela, Panamá, Perú, Ecuador	Cranes and forklifts	www.transportesmontejo.com
Guatemala	Guatemala	General tools and equipment, earthmoving, power, AWP and forklifts	www.gentrac.com.gt
Brasil	Brasil	Cranes and forklifts	www.carvalho.com.br
Colombia	Colombia	General tools and equipment, earthmoving and forklifts	www.garciavega.co
Costa Rica	Costa Rica	General tools and equipment, earthmoving, power, AWP, forklifts, portable accommodation and cranes	www.matra.co.cr
Chile	Chile	General tools and equipment, AWP, power	www.simmarent.cl
Brasil	Brasil, Chile, Perú, Ecuador, Argentina, Costa Rica, Panamá, entre otros..	General tools and equipment	www.tecbarragem.com.br
México	México, Caribe, América Central	Cranes	www.grupogtc.com.mx
Ecuador	Ecuador, Panamá	General tools and equipment, earthmoving, power and forklifts	www.iasacat.com
Brasil	Brasil	General tools and equipment	www.maquinasolo.com.br
Brasil	Brasil	AWP	www.tecparweb.com.br
Argentina	Argentina	Earthmoving, AWP, forklifts	www.gsarental.com.ar
El Salvador	Centro América	General tools and equipment, AWP, cranes and forklifts	www.grupomonelca.com
Brasil	Brasil	General tools and equipment, AWP	www.estaf.com.br
Argentina	Argentina, Chile	Earthmoving	www.biscaynerent.com
Brasil	Brasil	Portable accommodation	www.brasdone.com.br

Ammann put its compaction control system to the test with a research project on the B10 motorway near Pirmasens, Germany

The compaction market is changing, with new competition in Europe and an increasing focus on technology. *IRN* reports.



Good vibrations

The compaction market has seen changes over the last few months, with new electric/battery powered machines making their debut on the market, an increasing focus on compaction control technology and new methods to tackle the impact of vibrations on operators.

In Europe, the market has seen the entrance of Hitachi Construction Machinery Europe (HCME), which launched a new light compaction at the 2014 International Rental Exhibition.

Joep van den Maagdenberg, HCME product specialist, said the company already produced compaction equipment in Japan, and was now offering a range for Europe (imported from Japan).

"Since the launch in June 2014, we've seen lots of interest from potential buyers, including rental companies," he said. "We want to become a one-stop-shop for customers, and considered that adding light compaction equipment in Europe could be an additional value for our dealers.

"We want to get on to the market and introduce our product, but we are also keen to get some feedback from customers. With this kind of introduction, you could rush and go full speed ahead, but you may get bounced back by the market. We want a reliable, quality product that is recognised by the market.

"We know we face experienced competition, and I think availability, services and after-sales are crucial to stand out. If the demand is there we would expand the range. But first things first - we will see what happens with this introduction and listen to the feedback."

Hitachi Construction Machinery (Europe) chose the 2014 International Rental Exhibition as the launch pad for a new light compaction range of rammers, vibratory plates and rollers

The ZV-R rammers feature a low-vibration handle, user-friendly throttle lever and visible oil gauge, while the ZV-RL and ZV-RLS models were lightweight and featured Pipe Guard engine protection.

The ZV-PR reversible vibratory plate compactors feature a durable base plate helps to absorb shock, resulting in a longer life for the machine, and can operate in forward or reverse mode. Finally, the TMR65KDS walk-behind roller features a 650 mm drum width and was designed for ease of maintenance thanks to a one-touch keyed gull-





Joep van den Maagdenberg, Hitachi Construction Machinery Europe product specialist

increasingly important for the manufacturer in this region.

"The requirements for the ideal rental product differ quite a bit from country to country. Demand from the independent rental companies is by far the strongest in France and the UK, where demand is generally geared towards utility compactors, while in Germany - where we have our dealer Zeppelin Rental - demand is more for soil compactors."

He said ease of operation and ease of transport were key rental concerns in every market, while maintenance costs were also very important.

"Industry forecast wise - we think that total compaction industry in Europe is about 8000 units, with rental representing upwards of 70%. We are very busy with telematics at the moment - we have our Cat compaction control systems as well as our Product Link technology.

"In some areas, rental companies absolutely want to have it on - they know where their machine is



Wacker Neuson's new battery-powered AS 50 rammer

wing engine cover and a pull-out sprinkler nozzle for cleaning.

Mr van den Maagdenberg said the company expected to see industry levels of investment in compaction equipment increasing in Europe, with the highest potential in Scandinavia and the UK.

"We are looking at about half direct sales and half sales to rental companies. But we are seeing a trend towards rental - if you look at the transparency of rent vs buy, there is a lot of great data out there. Anyone can collect the information and make a calculation as to whether it's better to rent or own."

A rental business

Meanwhile, Hugo van Oostrum, Europe area manager for Caterpillar paving products, said compaction was increasingly becoming a rental business.

"This is particularly true for utility compactors - the small double drum rollers - at least 80% of which are going to rental. That's up from about 50% to 60% five years ago. The reasons are that utilisation is fairly low, it's very often a standby product.

"You do need to have it on site but you don't need it all the time. In general if you get 1000 hours a year, that's really a lot, and that compares to much higher utilisation elsewhere in the construction equipment sector."

Mr van Oostrum said Caterpillar only had dealer rental facilities in a few countries in Europe, so the independent rental companies were becoming

UK-based compaction rental company Clee Hill ordered the 12 tonne operating Dynapac CA3500 soil roller after testing the machine. Featuring a 2130 mm drum, the machine has Active Bounce Control technology, which prevents over compaction





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Hugo van Oostrum, Europe area manager for Caterpillar paving products

and how its running. But not everybody understands advantages yet, but we see this changing.

"Telematics and machine control systems really increase the production of the machine and I do believe that the requests for those systems will grow. I think we will start seeing contractors demanding this type of accountability on projects."

Machine control

Another manufacturer with an eye on telematics and machine control technology is Ammann, which put its compaction control system to the test with a research project, conducted together with three other manufacturers on the B10 motorway near Pirmasens, Germany.

One paver and twelve single drum rollers were in action on five kilometres of road - contractor Juchem spread the asphalt mix with the paver, and rollers from Ammann and three competitors took care of compacting the sections assigned to them. The finish was applied by an Ammann tandem roller equipped with a disc spreader.

The client, the Federal Highway Research Institute, and the project supervisors, the Institute for Highway Research at the University of Siegen, said the aim of the study was to demonstrate the influence of comprehensive compaction control on the quality of the finished blacktop.

The three pivot-steered Ammann AV 95-2 tandem vibratory rollers with a working weight of 9.5 tonnes were fitted with the company's ACE compaction system together with Topcon GPS technology.

Ammann said increases in load-bearing capacity were measured as the rollers made each pass and the compaction output adjusted accordingly. The ACE system regulates amplitude and frequency continuously and steplessly in consideration of the asphalt temperature, and also automatically transfers the steplessly generated amplitude vertically into the substrate.

Thomas Remy, sales manager at Ammann, said, "To be involved in this research project as one of the four 'protagonists' is of importance to Ammann. The assignment is considered a meaningful reference project.

"Our ACE measurement system serves companies as a self-monitoring tool and enables drivers to achieve the best compaction results with as few passes as possible. Permanent measurement and

automatic control during the asphalt installation process are decisive factors."

Meanwhile, as part of its 2014 Road Technology Days, a customer event attended by nearly 3500 people, Wirtgen Group took the wraps of new machines from its Hamm compaction brand.

The H 51 and H 71 soil compactors cover the 4.5 to 8 tonne classes, and one interesting design change is that the rear wheels are now driven by wheel motors instead of an axle. Hamm said this improves climbing ability and increases the ground clearance of the machines.

The two models are due to go into full production at the end of this year, with commercial availability from January 2015.

Also new from Hamm are the DV+ 70i and DV+ 90i tandem rollers, available a double vibratory roller (VV), an oscillatory roller (VO - a vibratory and oscillatory drum) and as a combination roller (VT).

One of the most striking things about the compactors is that they look almost identical from the front and the back. Indeed, Hamm said this was part of the design philosophy, which extends to the 180° rotating seat, allowing the operator to be comfortable whatever the direction of travel.

Production of the DV+ is scheduled to start at the beginning of 2015, with availability from the spring. Meanwhile, Wacker Neuson and Wirtgen have entered a strategic alliance for soil and asphalt compaction rollers, starting in February. Under the deal, Wacker Neuson said it would source rollers from the Hamm factory in Tirschenreuth, Germany, and distribute them via its own sales network, focussing initially on markets in Germany, Austria and Switzerland. We'll have an update on these new models in the next compaction focus.

Electric drive

Meanwhile, Hitachi's Mr van den Maagdenberg also commented on the recent trend for environmentally friendly electric drive or hybrid construction equipment - a trend that is also making its mark in the compaction sector. He said commercial viability and reliability were key considerations.

"Rental companies really are the ones that test these types of machines in the market. I've seen some of the new electric products that have been

Weber MT's CR7 series of reversible soil compactors are equipped with compaction control technology known as Compatrol. The 487 kg machine has a working width of 650 mm and is powered by a Hatz engine



launched, and I think there is always an issue - particularly with compact lines - that these machines are used on muddy, dusty job sites, and their electric components need to be reliable.

"However, from an environmental point of view there is a need to keep an eye on these product developments. Certainly Hitachi has the tools in its wider organisation - look at the AC-drive in its dumper trucks, for instance, which use electrical drive motors. We will watch this part of the market closely."

Last year, Altrad Belle introduced its first ever electric powered plate compactor in the form of the PCEL 400E (see April/May *IRN*), and since then Wacker Neuson has also launched a new rammer range with an electric motor for emission-free work without a power cable.

These new rammers will be available in two versions in 2015 - the smaller AS 30 model is a special rammer for the compaction of pipe gussets, while the larger 50 was designed for all traditional rammer work.

The H7 1 is one of two new soil compactors from Hamm





The company said users could save around 63% in energy costs by using this technology compared to traditional designs. It said the batteries of both machines could be removed without tools so that the operator can exchange the discharged battery with a charged battery in a few steps.

It added that the lithium iron phosphate batteries could operate in temperatures between -10°C and

+50°C and still offered over 80% capacity even after 1500 charge cycles.

Alexander Greschner, managing director of Wacker Neuson Produktion, said, "The battery-powered rammer is a real novelty on the market. And it is the result of collaboration with our customers, because we have implemented some requirements here that companies and users have brought to us."

"For example, the battery-powered rammer with zero emissions can fully display its strengths in trench applications and when used in buildings. For emission-free work not only protects the health of the operator, but also expands the range of application of the rammer - and therefore the flexibility of the company."

Vibrations

The company has also worked hard to reduce the impact on the operator when it comes to its other new launches - its latest vibratory plates boast a new centre pole that is said to produce very low hand-arm vibrations, for instance.

The component is for reversible vibratory plates in the 300 to 800 kg weight class and is said to allow under 1.5 m/s² for hand-arm vibrations. This low vibration level means that an operator can work without a time limit, Wacker Neuson said, citing European regulations.

Weber MT also produces a CF series of forward-moving vibratory plates, and said it had worked hard to reduce the impact of vibrations on the operator.

"Strong vibrations can be a health risk in the

long run and can lead to hand circulation problems. However, steering machines with low-vibration guide bars in the desired direction is often difficult," the company said.

Its CF 1, CF 2 and CF 3 vibratory plates are equipped with specially designed guide bars that are said to ensure low hand-arm vibrations as well as excellent machine control. The guide bar has been decoupled from the handle grip - providing an elastic connection between the two components.

IRN

New from Allen Engineering is a three-model line of single-direction plate compactors - the APC140H, APC160H, and APC210H - designed for applications from footings and sub-bases to paving stones and patios



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Broadening reach

Software developers are targeting new sectors in the rental industry and are seeking to extend their reach beyond the big players. IRN reports.

Hossam Zaki, vice president of pricing science at software developer Zilliant

Large rental companies - particularly the market leaders in the US - have been good early adopters of rental management and price optimisation software, but now the reach of this technology is spreading further into the industry.

"Now companies elsewhere in the world and smaller businesses are looking at the benefits," said Hossam Zaki, vice president of pricing science at software developer Zilliant.

The company is launching a new piece of software specifically targeting smaller rental companies - MarginMax Ramp, incorporating the company's Rational Pricing approach. It has been designed to improve utilisation and revenues, and better aligning rates with market and customer relationship dynamics.

"There is a niche for small- to medium-sized rental companies, and we think the MarginMax Ramp software is a good stepping stone to the full MarginMax package, which is more elaborate and sophisticated" Mr Zaki said.

"While we were working on previous rental engagements we found that a lot of



those smaller companies had discounting pricing mechanisms embedded in their invoicing that were not obvious for the sales reps or for the customers.

"The concept that we had was to create reasonable, rational, persuasive, transparent and rationale pricing - bringing out all the possible discounts, and presenting these upfront, not hidden in invoicing systems. The idea was also to influence behaviour - customers would know exactly how much of a discount they would get for renting for longer."

The company had seen good results including increasing rental durations and revenues over a three-month testing phase, involving comparing a control set of rental companies with a set running the new software.

Users can tweak parameters offline and only go to the field with a pricing scenario that they are happy with. They can also feedback in to the software and make adjustments as and when parameters change.

"The end result is that customers can trust the price that they're getting - all the reasons are available to everybody. I think we are moving the needle on total guess-work pricing to more data-driven rationalised science. Many small-to-medium sized companies don't have the time or money to invest in pricing teams on the same scale as the larger companies, so this software can help them automate these systems."

Multiple factors

Meanwhile, Ramco Systems vice president for enterprise asset management Rajeev Singh said that rental organisations thrived on multiple factors such as efficient customer service, maximum fleet utilisation, strategic rental terms, and cost-effective asset lifecycle management.

"It is a large canvas to work on, and unless organisations have an integrated and efficient business process plus real-time visibility and complete control over the business performance parameters, it is difficult to survive, let alone succeed," he explained.

Ramco's focus markets are the Asia Pacific, US and the Middle East and Africa. "For 2015, we believe the equipment rental industry will continue to grow in all key markets," Mr Singh said.

"Rental companies are looking at leveraging innovation, coupled with features like mobility, cloud, analytics and location-aware, to improve visibility across business operations and



The Wernick Group has launched a redesigned website: www.wernick.co.uk, reflecting the fact that Wernick Event Hire has been streamlined to Wernick Events, and Group Company PK Accommodation has now become part of the Wernick brand with its new name, Wernick Refurbished Buildings

Systems - a software company for the event rental industry. The company has just updated its entertainment equipment rental and production management business management software HireTrack to a new version, HireTrack NX.

The company currently has 550 companies in about 22 countries using the HireTrack software with an average of 5,500 people using it on a daily basis, and a further 130 companies signed up to the updated HireTrack NX package - a figure that Mr Rose said was increasing daily as more of its existing customers upgraded.

"The industry has changed a lot in 20 years," Mr Rose said. "Now it's far more about knowing how much money your kit is earning - data out rather than data in. Our software provides all the information you need for a certain job; from the equipment required and on what date, to availability checks in real time and price optimisation, all across multiple depots. It allows users to put together highly accurate pitches."

In terms of user profiles, Mr Rose said it was an open book - "Anyone from single users to hundreds of users. It really is across the board. We find that the way that a professional small company operates and a larger company operate are actually very similar, from pitching to invoicing and pricing."

Mr Rose added, "I think the events industry tends to be quite a good reflection of what the economy is doing. We have had new customers knocking on our door for HireTrack NX, not just existing customer - in fact we've had more new customers this year than the last three years put together."

Oil fields

Meanwhile, Helen Sowerby, COO at software developer Result Group, said the company had branched out into the oilfield rental market, where Ms Sowerby said there was a clear need for better cost management. She said the oilfield equipment rental software programmes covered everything



Helen Sowerby, COO at software developer Result Group

from the logistics of managing tools and equipment in the field, including delivery and pickup from well and job sites to the complex charging and utilisation recording that is essential for accurate cost management and billing to oilfield customers.

"We are seeing a change in the economics of the oilfield world, with lots of pressures bringing prices down - fracking, for instance - making the cost of extraction very important. Until recently, a large customer that we targeted didn't bother to track the costs of what they were supplying to the site. Now these types of costs are becoming far more relevant.

Result Group has been around for nearly 20 years, having started in UK market back in 1994 and then expanded into Europe and beyond. Ms Sowerby said now around 65% of the company's business came from the US, with some customers also in the Middle East and Australia.

"We think of ourselves as having three markets - specialist rental, re-rental and contractors looking for rental software to manage equipment," Ms Sowerby said.

The company's Rental Result software covers the purchase of assets and the asset lifecycle as well as the rental process. This means everything from quotes and CRM to logistics and equipment

also provide real-time information pertaining to fleet utilisation, performance improvisation and customer service. Organisations are also looking at leveraging technology to improve return on assets."

Singapore-based rental company Tat Hong recently adopted equipment rental and asset management software from Ramco to manage its fleet of over 1500 crawler, mobile and tower cranes. It said it had previously run different software, but would now use Ramco's single integrated platform.

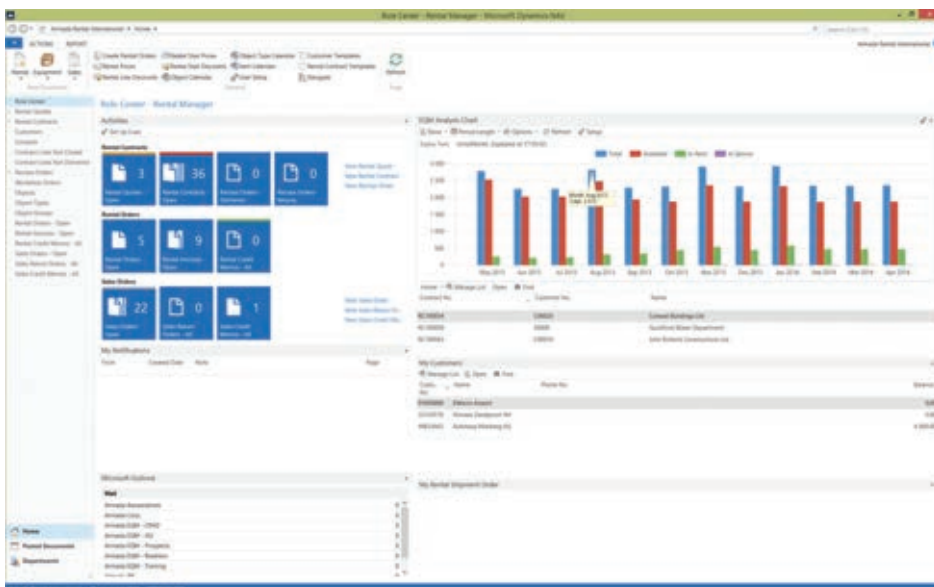
Ramco Equipment Rental and Asset Performance Management software features built-in analytics, mobility and integrates data visualisation using Google Maps.

"Our partnership with Tat Hong illustrates how Ramco is able to transform heavy asset operators by migrating their functions from multiple disparate systems to an integrated solution," Mr Singh said. "Currently, we have more than 5000 users for the solution, and it can be effectively utilised by mid-size equipment rental companies, just as well."

Events

Software companies are also targetting sectors aside from core construction equipment rental. David Rose, for instance, is a director at Navigator

Armada Dynamics has launched an upgrade to its Armada EQM rental management software. The upgrade to Microsoft Dynamics NAV version 2015 is said to bring new mobility and business intelligence functionality - allowing the use of mobile devices, for instance



New features for Enfinity rental management software Release 3 have been introduced by Solutions by Computer (SBC), including e-Sign electronic signature capture, StreetEagle GPS mobile workforce management, and consolidated invoicing capabilities

mobilisation and the pickup and off-rental process, according to Sowerby.

"We tend to go with the larger companies or companies with quite unique products and business set-ups. In terms of the uptake of new rental management software in the industry, I think mobile apps have forced a sea-change in senior executive thinking - people now interact with a business in far more ways than just over the phone.

"Some rental companies have been very forward thinking, but I would say the majority are still waiting to see what the others do. The most obvious advantages of adopting software to manage your rental fleet are gains in efficiency and productivity, as well as removing unnecessary administration and providing true mobile connectivity.

"Rental software can have a huge impact on a company's understanding of the availability and reliability of equipment, as well as true utilisation figures - giving a real-time take on what is actually going on.

"We've seen an increase in enquiries over the last 12 months, with lots more construction companies getting more interested. For 2015, I think we generally expect to see an increase."

Mobile future

Looking to the future, managing director at InspHire, Graham Dobbs, said the world was moving increasingly towards mobile solutions, and being able to transact around the clock would become the norm.

"Customer Service has always been important but even more so now with heightened awareness of choice," he said. "Hirers will also look towards recommendations from independent sources such as Facebook, Google+, LinkedIn, twitter and other review methods will play a big part.

"Web Portals for customers will be more prevalent, hire companies providing the ability to do more online will encourage people to use them more. Mobile Apps for hirers will be more in demand and drive how hire customers do business and will dictate where they shop."

Mr Dobbs said the challenge for developers was making sure that new software features were useful and designed with the users in mind. "Keeping it simple is key," he said, "Hire software will become more agile being able to be used on many different devices, integration to customers own web site and other 3rd party software will become mainstream.

"InspHire already offer Cloud Hybrid solutions as well as mobile applications and customer web portals and have done so for some time, we are seeing companies taking more of an interest and

Director at Navigator Systems David Rose: "The way that a professional small company operates and a larger company operate are actually very similar, from pitching to invoicing and pricing."



adding to the already expanding list of features and functionality.

"We also have a totally pure, cloud based solution, already in use in some rental businesses, these businesses can use the application free of any windows licences and the costs of windows server software and hardware."

With technology such as smart phones and tablet computers now commonplace, software designed for rental companies has potentially never been more accessible. It will be interesting to see how smaller rental companies react to these changes. **IRN**



The democratising Internet

Eugen Russ, CEO of erento, said it was up to rental companies to define whether the internet became an opportunity or a threat for their business.

"However, more business-heavy rental sectors like tools, machinery or medical equipment are now seeing more and more of their business coming through the Internet. This change constitutes a unique opportunity for rental businesses."

Mr Russ highlighted increased visibility and customer reach as key opportunities - and not just for the larger players on the market.

"The internet is an additional sales and marketing channel that allows even small companies with a small budget to advertise their products and services effectively. Rental platforms like erento provide a level playing field for all companies. Even the smallest, family-run companies can now compete directly with the big players," he said.

"This is because the Internet has a true democratising effect and is greatly transparent: good customer service and product quality are key."

Erento is one of many online resources targeting the rental industry - an arena which has seen new start-ups launched in recent months, all jostling for space together with the well-known and well-established equipment auction sites like IronPlanet and Ritchie Bros. Here are some examples of the latest launches:

Equippo.com

Equippo is an online used equipment market designed to link sellers of used heavy equipment and buyers in international export markets, like Peru, Poland or Russia. CEO Michael Rohmeder said, "The resale of equipment at the end of its useful rental life is a key income stream for rental companies. We are trying to break down trade barriers. Pricing is all-in and transparent, including customs, transport, logistics costs and independent equipment inspections."



Kwipped.com

Kwipped is an online platform designed to connect rental suppliers with customers. Users can navigate rental availability, execute rental contracts and co-ordinating delivery. It takes into account issues like insurance, security deposits, accessories, return shipping, replacement costs and the reliability of both the renter and the supplier. Founder and CEO Robert Preville said the site would "enable businesses to expand their capabilities and bid on projects they may have previously passed on due to lack of access to the necessary equipment."



Indoogoo.com

Indoogoo is a heavy equipment trading website that has introduced a service using geolocation technology known as MyRentals. The idea is to create comprehensive search results from both local rental companies and other Indoogoo users, helping them locate and rent heavy equipment from different sources. CEO and founder Mark Turner said, "With this service, everyone can be a renter. It gives all users the opportunity to hire out their equipment when it is not in use. Renting equipment should be straightforward."



Allequip.com

IronPlanet launched AllEquip.com, a global online, "buy now" marketplace of used construction equipment. IronPlanet CEO Greg Owens said, "We are committed to making the buying and selling of equipment faster and easier." AllEquip is said to manage the complete transaction between buyer and seller, from listing on the site to final payment. Every item for sale has a guaranteed inspection report.





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Made for rental

Following *IRN's* preview of The Rental Show 2015 in the last issue, here we give a snapshot of some of the equipment that will be on display at the ARA's 59th annual convention and rental trade show.



Taking place from 23 to 25 February at Ernest N Morial Convention Center in New Orleans, US, the American Rental Association (ARA) expects over 675 exhibitors to attend The Rental Show 2015, while the 2014 event attracted 5,600 visitors.

A wide range of equipment will be on show, from generators to skid steers and access platforms - all targeting buyers from the rental industry.

One of the newer faces in the North American market is Australian manufacturer of light construction tools Makinex, which will be exhibiting at the 2015 show after launching its products into the region at the 2014 Rental Show in Orlando.

Makinex has formed a partnership with Iowa, US-based pressure washer, air compressor, generator, and portable heater producer Mi-T-M that will see the latter manufacture its dual pressure washer trolleys in North America. Makinex also produces floor



The SGX3500 features Subaru's 7 hp (6 kW) EX21 engine and a 4 gallon (15 l) capacity fuel tank for a total run time of 8 hours at the rated load

strippers, floor saws, pressure washers and jackhammer trolleys.

Another new face will be Avant Tecno, which has launched in the North American rental market and will be exhibiting for the first time. The manufacturer said it would be showcasing its new compact articulated loaders and attachments, designed for industries from construction to demolition, equestrian to forestry, farming to landscaping.

John Spencer, national sales manager for Avant Hire Network UK, said, "I have noticed an ever-increasing demand for equipment with high utilisation and an ability to command a high rental charge while remaining competitive with other equipment."

The company sells direct and also rents its 400, 500, 600 and 700 series models - with lifting capacity ranging from 499 kg to 1406 kg, powered by 25 kW to 37 kW engines. It said the most requested attachments included brooms, buckets, dozer blades, snow blowers, tree grabbles and tree shears.

Meanwhile, Subaru Industrial Power Products said it had made several upgrades to its SGX Generator line, which will be on show at the exhibition. It said the SGX3500 featured Subaru's 7 hp (6 kW) EX21 engine and a 4 gallon (15 l) capacity fuel tank for a total run time of 8 hours at the rated load.

A 9.5 hp (7.1 kW) EX30 engine powers the SGX5000, and Subaru said it had this model's fuel tank capacity

Makinex has formed a partnership with Mi-T-M that will see the latter manufacture its dual pressure washer trolleys in North America

to 8 gallons (30 l) for a total continuous run time of 10.7 hours at the rated load. Finally, the 14 hp (10.5 kW) EX40-powered SGX7500E offers an 8 gallon (30 l) fuel tank for 7 hours of operation at the rated load.

And Jenny Products said it would showcase examples from its four-model K-series of gas-powered compressors, all of which portable on wheels and boast 5.5 hp Honda engines and the company's K compressor pump.

It said the 17 and 30 gallon (64 l and 114 l) air tanks come standard with two tires, while the 8 and 15 gallon (30 l and 57 l) tanks offer the options of one or two tyres.

Rental software producer Baseplan will also be at the show, hosting a meeting room to allow customers to meet and discuss their rental and equipment management needs, as well as showcasing graphic displays to help illustrate the Baseplan Enterprise solution on the company's stand.

Baseplan CEO and president Andrew Ferry said, "Baseplan Enterprise is all about helping customers maximise their return on investment. It offers our clients the power to manage their businesses more effectively, with a fully integrated solution that tracks the total cost of ownership on equipment, so that businesses can more effectively manage their assets as investment."

Jenny Products said it would showcase examples from its four-model K-series of gas-powered compressors



Avant Tecno said it would be showcasing its new compact articulated loaders and attachments

The Rental Show 2015 at a glance

WHAT: The American Rental Association's 59th annual convention and rental trade show

WHEN: 23-25 February, 2015

WHERE: Ernest N Morial Convention Center, New Orleans, US

HOTELS: www.therentalshow.com



COURTESY AMERICAN RENTAL ASSOCIATION

Access

Plenty of access equipment manufacturers will also be present, including equipment from MEC Aerial Work Platforms, which said it would unveil a new 60 ft (18.5 m) boom lift. The 600 lbs (272 kg) lift capacity machine features 42 ft, 8 in (13 m) of outreach and can be powered by either diesel, battery or with a hybrid option.

JLG, for its part, said it would introduce its redesigned JLG and SkyTrak telehandlers at the exhibition. Reworked from the ground up, it said these new telehandlers reflect extensive market research and customer input.

The manufacturer said new additions to its line of boom lifts and scissors lifts would also be showcased, together with its latest generation of FT Series LiftPod personal portable lifts.

Meanwhile, custom Equipment said it would display seven models from its line of Hy-Brid low-level scissor lifts at the exhibition, including the HB-830. This 550 lbs (249 kg) lift capacity model features a longer platform to give maintenance crews and contractors more space, as well as a zero turning radius for confined spaces. Its working height is up to 14 ft (4.3 m).

The HB-1030, the HB-1230, HB-1430, HB-P1027, HB-P827 and HB-P527 models will also be on show - all of which feature dual front wheels to help weight distribution, and lightweight designs.

And ReachMaster said it would showcase a range of products, including a boom from its new partner Dinolift. ReachMaster recently agreed the sales partnership with Finland-based trailer mount specialist Dinolift, which also manufactures



MEC Aerial Work Platforms is set to unveil a new 60 ft (18.5 m) boom lift

tracked platforms and booms. More details of the arrangement will follow soon.

On display will be the Dinolift RXT rough terrain boom series, with working heights between 67 ft, 5 in (1.9 m) to 86 ft, 11 in (26 m). The Dinolift has an articulated and telescopic boom, oscillating front axle and four-wheel drive with two-wheel steering, four-wheel steering and crab steering.

This is just a glimpse of some of the many products targeting rental buyers that will be on show at this year's exhibition. Editorial teams from *IRN* and its sister publications will also be heading out to New Orleans to gather news from the event - keep an eye on khl.com for all the late-breaking news. **IRN**

For its part, Ditch Witch said it would present its new ultra-compact SK850 mini skid steer, featuring a 27.6 kW Tier 4 engine and a rated operating capacity of 390 kg



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Return to Paris

INTERMAT
Paris 2015

Intermat at a glance

WHAT: Construction equipment exhibition

WHEN: 20 to 25 April, opening hours 09:00 to 18:00

WHERE: Paris-Nord Villepinte, Paris, France. The exhibition centre is located 30 minutes from Paris by public transport (RER line B) and five minutes from Paris-CDG airport.



The 2012 exhibition attracted over 200000 visitors, 34.2% of which were international



April sees the global construction equipment industry make its triennial migration to France for the Intermat exhibition. *IRN* previews the event, ahead of our full show guide in the March issue.

Three years have flown by since the 2012 edition of Intermat, and this year's largest construction equipment exhibition is just around the corner.

Taking place from 20 to 25 April at the Paris-Nord Villepinte in France, this 10th edition of the show is set to take up 375000 m² of exhibition space, accommodating 1500 exhibitors. The 2012 exhibition attracted over 200000 visitors, 34.2% of which were international - and no doubt the organisers will be looking to match or exceed these figures this year.

The event is organised by SE Intermat, which brings together trade associations CISMA (Association of Equipment Manufacturers for Construction, Infrastructure, Steel and Handling Equipment Industries) and SEIMAT (Association of International Civil Engineering, Mining, Construction and Hoisting Equipment Industries) as well as event organiser Comexposium.

The organisers said they had seen 238 new brands register for the show, including the comebacks of Manitowoc Crane Group and Manitou, the latter joining Fayat, Haulotte and Mecatec.

Other big names at the exhibition will include CNH Industrial, Doosan, Hitachi Construction Machinery, Hyundai Heavy Industries, JLG, John Deere, Kobelco Construction Machinery, Komatsu, Kubota, Liebherr, Liugong, Sany, Shantui, Terex, Volvo Construction Equipment, Wirtgen Group, Wacker Neuson and Zoomlion/Cifa.

World of Concrete Europe

Perhaps the biggest change this time round is the news that the Intermat show will host a special World of Concrete Europe (WOC Europe) segment, organised together with Hanley Wood, which runs the annual World of Concrete exhibition in the US.

Situated at the front of Hall 7, WOC Europe will feature products from the concrete and masonry sector targeting the commercial construction industry, including concrete mixing equipment and machinery, concrete production equipment, pre-cast tools, equipment for concrete placing and software packages. Demonstrations of the latest innovations in concrete will take place on the plaza outside the hall.

Liebherr plans to showcase its PR 756 dozer at the show, while it is also launching a new 40 tonne excavator



Magni's RTH 5.25RS telehandler, part of its new dedicated range for rental



Emphasis will be placed on a programme of educational presentations and training & demonstration workshops, which are a key component of all World of Concrete events.

For the rest of the Intermat show, a new exhibition layout has been introduced - as well as using the new Hall 7, the show will also take up the outside demonstration areas together with halls 5A, 5B and 6; instead of halls 3 and 4.

And together with the emphasis on concrete through the WOC Europe partnership, Intermat also plans to shine a light on the demolition and recycling sector as well as hand-held construction tools.

Visitors from the rental industry will also have plenty to see. Morris Site Machinery, for instance, said it planned to showcase its SMC TL-90 LED lighting tower, featuring five 240 W LED lamps and a 1500 rpm Kubota engine.

The machine runs from mains power via a changeover switch; alternatively three towers can be linked together to run from one engine consecutively, offering almost 400 hours of usage, according to the company. Morris said the TL-90 LED uses 50% less fuel than a standard lighting tower.

And the company said it would also have the Hilti Sprite 2 in (559 mm) petrol diaphragm pump on show.

Managing director Phil Winnington said, "With a long standing reputation for providing innovative and high performing machinery throughout Europe, Intermat provides an excellent opportunity for us to strengthen our existing international business links through networking and meeting with key decision makers in the infrastructure and construction industries."

Magni, meanwhile, plans to showcase examples from its telescopic handler range at Intermat,



Morris Site Machinery said it planned to showcase its SMC TL-90 LED lighting tower, featuring five 240 W LED lamps and a 1500 rpm Kubota engine

including its new dedicated range for rental - the RS Range, which will be introduced during 2015.

The range consists of the RTH 5.18RS, 5.21RS, 5.23RS, 5.25RS and 5.26RS models, with maximum reaches ranging from 18 m to 26 m. Magni said all the models, except for the 26 m, were built on the chassis of the 21 m, making the machines very compact. The RTH 5.26RS has a bigger chassis.

The range will boast Perkins and Deutz engines - Magni said the RTH 5.21RS, for instance, would boast a 136 hp (101 kW) Perkins Tier 4 Final engine and a two-speed Bosch Rexroth hydrostatic transmission.

The company said, "18 m and 21 m machines are nowadays the most rented models in Europe, because of their good lifting capacities. But we are trying to push the rental market 'higher', offering 23, 25 and 26m models with better load charts."

Earthmoving launches

Plenty of launches are planned in the general earthmoving sector too, with Liebherr to premier a new crawler excavator at the show, and also showcase new dozers and concrete pumps, among other equipment.

The ERA at Intermat



The European Rental Association (ERA) is organising a rental day at Intermat, on Thursday 23 April. A conference will take place from 14:00 to 16:00 consisting of a detailed presentation of the work accomplished so far by the ERA equipment technology committee.

This topic should be of interest to numerous manufacturer's representatives present at Intermat, and will allow ERA to spread the word for larger and deeper involvement by the equipment manufacturing industry in the rental world.

The ERA said a debate was planned to follow this presentation, with invitees from rental companies and manufacturers discussing the industry for about an hour, followed by a question and answer session.

Meanwhile, on 22 April the ERA said it planned to organise workshops between rental companies and manufacturers around the Equipment technology committee. The ERA said the idea was to narrow the gap between the needs of rental companies and the proposals and solutions from manufacturers.

Further details of the ERA's plans for the industry during Intermat will be confirmed in the next issue.



For smaller loaders and skid-steers, RDS offers the Weighlog a10

The manufacturer said the 40 tonne R 946 crawler excavator it planned to unveil was powered by a EU Stage IV/US Tier 4 Final-compliant 200 kW Liebherr engine. Key design features include advanced hydraulics, reduced maintenance and a spacious cab.

The company's new Stage IV/Tier 4 Final PR 746 and PR 756 dozers will also be on show, with operating weights of 20 to 40 tonnes, while the new 37 Z4 XXT truck-mounted concrete pump will also be on the stand, featuring a four-section 37 m boom.

RDS, meanwhile, said it planned to showcase a new retrofittable weighing scale for tracked and wheeled excavators in the form of the Loadex 100. Designed to weigh the amount of material in the bucket, the

device has been developed to operate within the fastest loading environments maximising tonnes per hour performance.

And the company said it would also have its Loadmaster a100 on-board weighing scale for wheeled loaders on display. It said this device features a new CAN based system combining sensor technology and signal processing techniques to provides precise and consistent bucket weight information.

The Loadmaster a100 uses a 7 in (178 mm) colour touch screen display and additional physical keys and is said to be suitable for use with up to 10 different attachments - e.g. buckets or forks. The system can also be retrofitted onto wheeled, telescopic and tractor type loaders.

For smaller loaders and skid-steers, RDS offers the Weighlog a10, which also benefits from a colour touch screen display. This instrument is said to be a user friendly on-board weighing system which provides accurate and consistent bucket and total load results, meaning stock management and check-weighing operations can be controlled more effectively.

This is just a first glimpse at some of the equipment that will be on show at Intermat 2015, with a full show guide available in the March issue.

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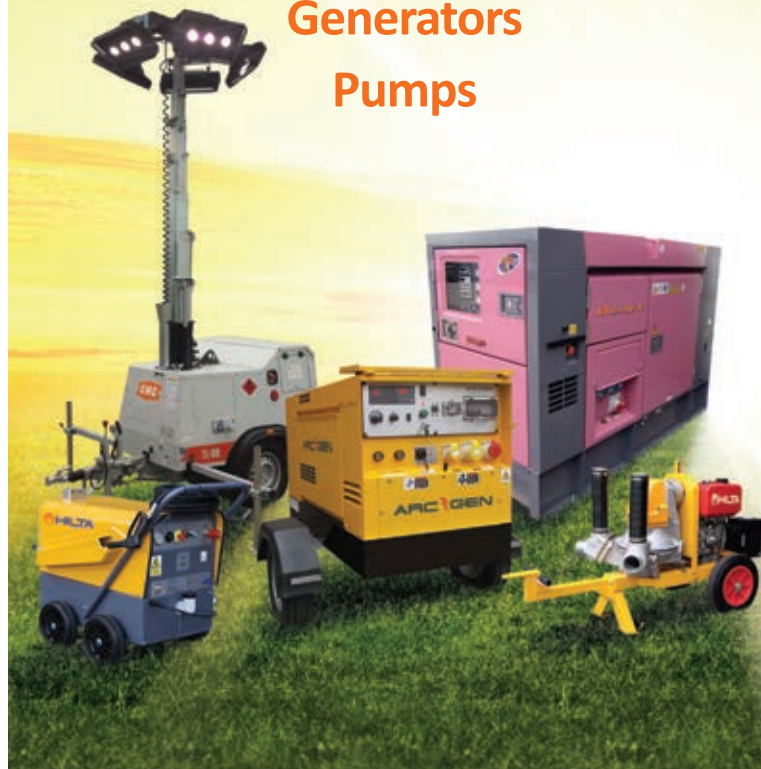
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A 'sold out' show

The Executive Hire Show takes place from 11 to 12 February at the Ricoh Arena in Coventry, UK, and exhibition space for this rental festival was all snapped up in November.

Executive Hire Show director Robert Aplin announced back at the end of November that over 150 exhibitors had snapped up all the available space at the 2015 exhibition - the 9th annual edition of the show - while the 2016 version of the exhibition was already 60% pre-booked.

"Exhibitors travel from all over the UK to take part in the Executive Hire Show and we are on course to set new records once again in 2015," Mr Aplin said.

"Last year we had a record 1908 visitors and 148 exhibitors but we are confident of beating those



Genquip plans to exhibit its Fusion Mobile welfare unit at the show

The Executive Hire Show at a glance

WHAT:

Rental equipment exhibition

WHEN:

Wednesday 11th February 9.00am - 5.00pm
Thursday 12th February 9.00am - 4.00pm

WHERE:

Ricoh Arena, Coventry UK

PRE-REGISTRATION:

www.executivehireshow.co.uk

TRAVEL:

The closest major airport is Birmingham International which is approximately 25 minutes by car to the Ricoh. The closest railway station is Coventry which is around 20 minutes by taxi to the venue. For Sat Nav - use this postcode - CV6 6AQ



because of the response we have already had.

"To have sold out exhibitor space three months before the event takes place is extremely satisfying and underlines that this is a show which people in the industry are keen to attend and that the economy is showing signs of recovery," he added.

This year more than 29 new companies have committed to the event, with new companies including AJC Trailers, Atlas Copco, King Highway, Ranger Equipment, Securi-Cabin and Terex.

Generators

New launches in the dynamic field of generators include Firefly's plans to introduce two new hybrid models. The company was staying tight-lipped on the exact details prior to the show, but said the two new units offered advanced autonomy, increased power and operating capacity, longer run times as well as new battery technology.

In addition, visitors can view Firefly's current offering of Cygnus hybrid models, which range from 1.2 kVA to 24 kVA.

Meanwhile, Pramac said it would use the exhibition to launch its new Rental Range of generators. Andy Durno, sales director Pramac UK said, "We will have a full range from 20 to 500 Kva dedicated to this market with the latest tier 3A compliant engines and long run integral fuel tanks.

"This new design will feature new canopy designs at each power node and the latest communication upgrades alongside the CoMap controllers so popular with the rental industry at present. The exact designs have yet to be realised but we know that the engineering team have been busy ensuring the range caters for the varied applications in which they will be used...so watch this space."

In addition to this new generator range Pramac will



Nu-Star Material Handling's new electric mini dumper - the MUV Electric Wheelbarrow



also feature the latest handling equipment from its Italian built Lifter range.

Morris Site Machinery, meanwhile, said it would showcase its four key brands, SMC, ArcGen, Denyo and Hilti at the exhibition.

Of particular note will be two new Denyo generators - the Denyo Eventa 50kVA generator, designed to be the ideal ultra-silent backdrop to any performance in the TV, film and events industry with an average sound pressure level of just 58dB(A); and the super silent Denyo Renta 50kVA, for industries such as construction, rail and petrochemical, with an average sound pressure level of 63dB(A).

Site equipment

Also new on the MSM stand will be the SMC TL-90 LED lighting tower, a five 240 W LED lamp model, while the new SMC Solar-2 solar-powered lighting tower is said to provide 100% fuel saving and emits zero CO2 and noise.

Bobcat, meanwhile, said it planned to debut its new generation of 1-2 compact excavators at the show in the form of the E17, E19 and E20 models. Designed to be towable on trailers for up to 2000 kg, the company said transportability had been further enhanced by new tie-down points.

An expandable undercarriage, automatic slew brake and advanced diagnostics, instrumentation and hydraulics are just some of the many standard features included on all three excavators.

The new Bobcat range will be joined by products from sister company Doosan Portable Power and Montabert, including the 7/31E+ Tough Top portable compressor and the Montabert SC8 hydraulic

JCB's new range of midi excavators will be launched to the UK market at the exhibition



The 2014 show had a record 1908 visitors and 148 exhibitors

One of the major advantages of the new models is said to be the JCB Diesel by Kohler engine, which requires no DPF, reducing cost of ownership for customers and offering ease of maintenance.

For its part, nu-Star Material Handling said it planned to showcase its new electric mini dumper - the MUV Electric Wheelbarrow - at the show. This is a push-button operated electric dump is capable of tipping loads up to 350 kg, powered by either a 800 W or 1,200 W DC electric drive motors.

Portable accommodation and toilet rental equipment will also feature at the show. Genquip, for instance, said it planned to exhibit three products at the show - the GP360D mobile welfare unit, the Fusion Mobile welfare unit and the Fusion static welfare unit

The Groundhog SW08200 Fusion Static welfare unit includes the Hogloo20 waste management system. Designed for remote on-site applications, Hogloo technology is said to allow the evaporation of all effluent and grey water waste in locations where normal drainage or effluent services are prohibited or non-existent.

Clare's range of advanced electrical safety testers for the tool hire, service and repair industries will also be on display, including the specialist B255 hire industry tester. This bench top unit is said to enable the full suite of electrical safety tests, including earth/ground bond and hipot/flash testing alongside load, run and leakage testing.

Also featuring will be the SafeCheck 8 - a safety tester for use in workshops in hire outlets, rental stores and tool repair companies. This tester is said to enable all relevant electrical safety tests to be carried out on rental tools and equipment fast and in line with the recommendations of the HAE EHA electrical safety code.

Plenty of new software and technology will be demonstrated as well. Examples include MCS, which



Firefly's current offering of Cygnus hybrid models range from 1.2 kVA to 24 kVA. The manufacturer said it planned to introduce two new hybrids at the exhibition

breaker, together with a selection of air-powered Doosan breakers and tools.

JCB's new range of midi excavators will also be launched to the UK market at the show. The first models unveiled as part of the new line-up are the 8.5 tonne 86C-1 conventional tailswing model and the 85Z-1 zero-tailswing model - both designed to grab a bigger share of a market that is expected to grow by at least 16% over the next four years.

Morris Site Machinery will showcase new Denyo generators



said it would demonstrate the latest enhancements to its MCS-rm hire management software solution, together with its suite of mobile apps for rental customer service, delivery and collections.

This is just a snapshot of some of the equipment that will be on show - editorial teams from IRN and its sister publications will also be pounding the aisles, so keep an eye on KHL.com for news from the event as it happens.

IRN



Doosan Portable Power will have its 7/31E+ Tough Top portable compressor on show

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Save the date 21 September 2015

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INTERNATIONAL **rental** ASIA CONFERENCE

The third IRC conference, to be held in Beijing on 21 September 2015, the day before the BICES exhibition, will again feature a line-up of leading speakers who will share their rental expertise, with a focus on rental management best practice and trends in Asia's rental market.

SPEAKERS:

- **Jim Bar** Vice President/General Manager Greater China Sales and Service, Terex AWP
- **Jia Li Cai** Managing Director, Machinery Management & Rental Division of the China Construction Industry Association (CCIA)
- **Gary Kucher** (Chief Executive Officer, Mongolia Holdings, Mongolia)
- **Enilson Moreira de Lima** Chief Executive Officer, A Geradora, Brazil
- **Michel Petitjean** (Secretary General, European Rental Association, Belgium)
- **Vivek Soni** co-CEO & CFO, Gemeni Equipment and Rentals, India
- **Ni Xinli** Chairman and founder, Jiangsu Tongyuan Machinery Sales & Service Co Ltd
- **Chunyu Zhang** General Manager, Shanghai Horizon Equipment & Engineering Co

Speaker line-up subject to change

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Speaker line-up subject to change

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Last year was characterised by stability in the US and a declining UK market as far as equipment values were concerned. Rouse Services provides the details.

The year in detail

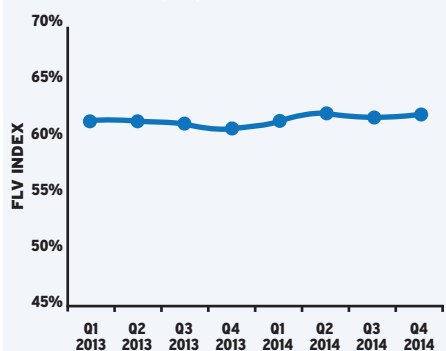
US market metrics

Equipment values in the US ticked up slightly in the fourth quarter 2014, but remained relatively flat throughout 2014. Current Forced Liquidation Values are more than 45% higher than the prior trough period in mid-2009.

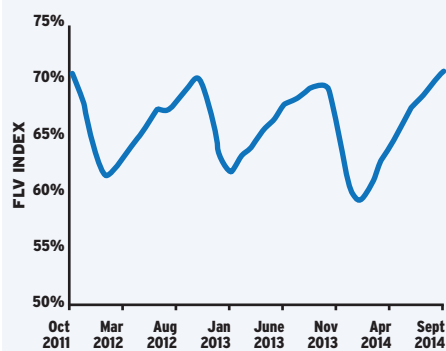
Aerial categories and compaction equipment have seen the biggest value improvement over the last 24 months, while certain earth moving categories (excavators and wheeled loaders) have experienced declines.

Measured by the Rouse Rate Index, US rental rates are up 26% through September 2014 relative to January 2011. Over this period, the generator and backhoe (35% through September 2014) categories have seen the largest rental rate increases, while aerial categories have experienced increases from 21% to 26%. Physical utilisation, which is seasonal, has remained steady, though on larger fleet sizes today than in January 2011.

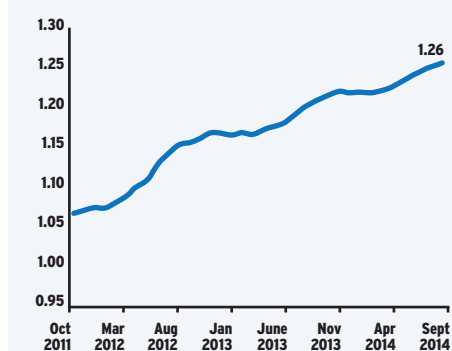
ROUSE FORCED LIQUIDATION VALUE INDEX (US)



PHYSICAL UTILISATION



ROUSE RATE INDEX

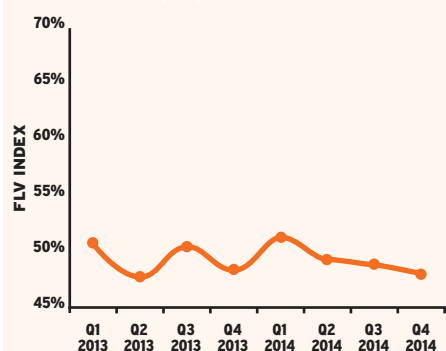


UK market metrics

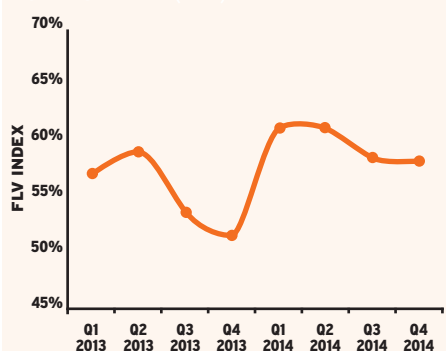
The fourth quarter 2014 Rouse Forced Liquidation Value Index (UK) for used equipment prices observed in auctions taking place throughout the country decreased by 1.4%, from 48.9% in the third quarter to 48.2% in the fourth. The index decreased each of the last four quarters, with values currently in-line with Q4 2013.

Many of the major categories tracked by Rouse experienced quarter-on-quarter value declines in the fourth quarter - excavators (-7.5%), skid steer loaders (-6.4%) and air compressors (-5.1%). The wheeled loaders category experienced the largest quarter-on-quarter increase at 11.7%. The value of UK construction output increased approximately 10% in 2014 year-on-year. Growth in the value of UK construction output continues to outpace 2013, though at a slower pace in the second half of 2014 compared to the first half of the year.

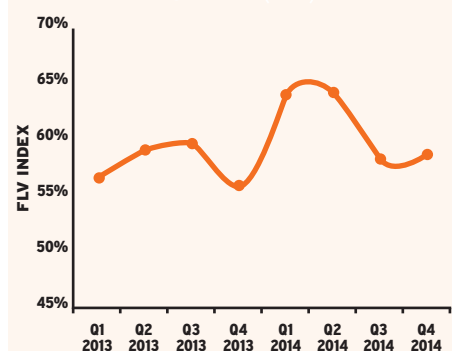
ROUSE FORCED LIQUIDATION VALUE INDEX (UK)



DOZERS INDEX (FLV)



TELEHANDLERS INDEX (FLV)



US-based Rouse Services is a leader in construction equipment appraisals, used equipment sales support and fleet management analytics, specialising in the rental sector. For more information go to www.rouseservices.com



Definitions:

Rouse Forced Liquidation Value Index

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

Forced Liquidation Value (FLV)

The estimated gross amount expressed in terms of money

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

Rouse Rate Index

Achieved rental rates relative to January 2011 (when Rouse

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

Physical Utilisation

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

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For a rental company, being traded on a stock exchange has advantages and challenges - Jeff Eisenberg from Claremont Consulting explains.

Rental companies and stock markets

Equipment rental companies used stock markets to billions of US\$ for investment over several decades. In November, US based Neff rentals had a successful Initial Public Offering (IPO) of its shares on the New York Stock Exchange (NYSE), the first for years. This was followed by HSS Hire's move for an IPO in the UK as IRN went to press. For a rental company, being traded on a stock exchange has advantages and challenges, but we should expect to see more IPOs in the coming years.

Why go to the stock market?

"That's where the money is." A quote from Willie Sutton, when asked why he robbed banks, last century. But the logic applies to the stock markets, which are larger than the private equity fund market.

The NYSE is capitalised at approximately US\$25 trillion (€21 trillion), while the global private equity market is perhaps US\$2 trillion (€1.7 trillion), this can be "exit" to for private equity or company founders.

Company management generally has more autonomy on a stock market compared to private equity. Most investors are passive and rarely require a seat on the board. Some stock market investors do not require even an annual dividend.

Indeed, the IPO prospectus for Neff says, "We do not intend to pay dividends ... for the foreseeable future." Their investors are happy to see the company grow in value, with a rising share price, re-investing everything,

Is the stock market money "cheap money?"

Once on a stock exchange, it is a straightforward process to issue more shares, sell them on the market, and use the proceeds for investments. Before 2008, some rental companies did this every year, and using the funds for acquisitions, equipment and cashflow.

Neff's history had rapid growth and a series of

investors. An ex Hertz executive, Jose Peres started the company with backing from the Mas family in 1990, with a history in construction.

The company grew during the 1990s and joined with Neff, a Florida John Deere dealer, reaching sufficient size for an NYSE IPO in 1998. Like many rental companies, it suffered in the early 2000s and the 2008 crisis and went through a three sets of private equity investors (Odyssey, Lightyear and Wayzata). Wayzata will be able to sell their shares in Neff only after six months from the IPO date, a common arrangement.

Disadvantages

Going to the stock market is complex, costs money and time. Total costs for the Neff IPO according to their prospectus were US\$5.3 million (€4.5 million) to raise US\$146 million (€124 million).

The management must spend time every quarter presenting and explaining results to investors and analysts. A publicly traded company has to take all necessary steps for health and safety, environmental compliance, internal audit controls, and others, with a larger more expensive board of directors.

The Neff IPO share price target was US\$20 (€17) per share, but on the day of the IPO a fraction under US\$15 (€12.7) was achieved. Calculating from figures in the prospectus, this is equivalent to an Enterprise Valuation of 6.66 x EBITDA (Earnings Before Interest Tax Depreciation and Amortisation).

This is certainly respectable compared to the 6 x rule of thumb for rental company valuations, lower than some higher than others.

The share price Rollercoaster

Stock markets have gone up and down for many reasons as investors buy and sell shares, trying to predict what will happen next and stay one step ahead.

Since the end November IPO date, the Neff share price fell from US\$14.8 (€12.5) to US\$9.5 (€8) on 7 December, down 36%. United Rentals share price fell 22% and Head and Enquist fell 41%. None of these NYSE companies released any information during that time, the implication being investors are looking at macro factors such as the oil price decline and fear of a slowdown.

A low (or volatile) share price makes it difficult for these companies to raise money, and in Neff's case for their investor Wayzata to get their investment back.

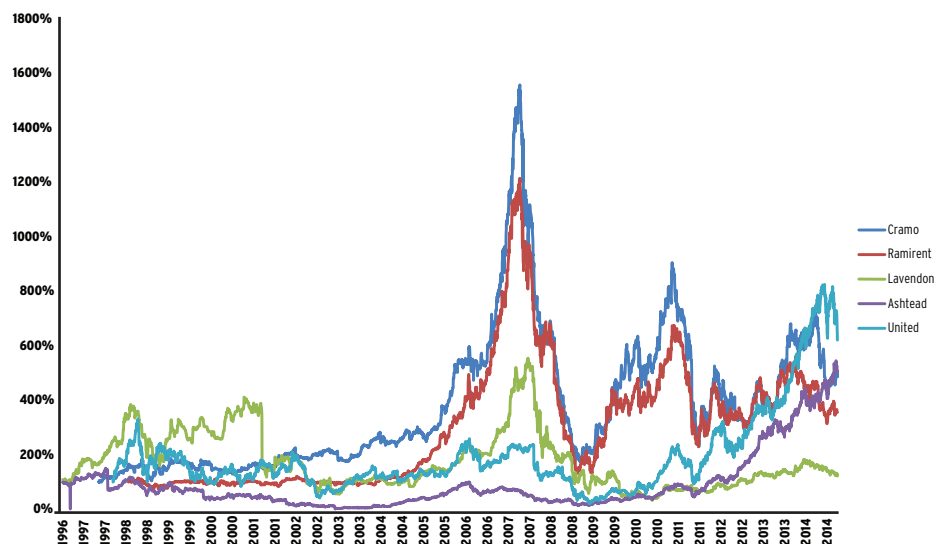
The graph shows the relative movements in the share prices of United Rentals, UK based Lavendon Group and Ashtead Group, and Europeans Ramirent and Cramo since the mid-1990s. Some of these prices have gone up and down 1000%, or ten times, with investors rushing in and rushing out of the industry.

Will rental companies keep using stock markets? The Neff IPO was a success, despite the (probably) temporary decline in share price. Expect to see more IPOs, in the US and elsewhere and subsequent share issues as companies raise first time and additional money on these markets, partly encouraged by Neff.

Just United and Ashtead together have more than US\$17 billion of stock market investment (Jan 9), and the available investment for growth is worth the cost and inconvenience of dealing with the Rollercoaster.

IRN

SHARE PRICES - RELATIVE TO IPO (ORIGINAL CURRENCY)



Jeff Eisenberg has spent 18 years in the equipment and rental industry. He started and led Genie Financial Services in Europe, providing finance for large and small rental companies all over the world. Since 2000 he has held senior positions in a number of European rental companies, as well as working with startups and acquisitions. He now provides consulting services to financial institutions, equipment manufacturers, and rental companies.

Contacts tel: +44 7900 916933 email jeff@claremont-consulting.com

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INTERNATIONAL
rental
CONFERENCE **ASIA**
24 November 2014
Shanghai

More than 280 delegates gathered in Shanghai, China, on 24 November last year for the second International Rental Conference (IRC), organised by KHL Group and International Rental News (IRN). IRN reports on some of the key talking points.



There is a widespread view that China is poised to become a major equipment rental market. However, as delegates heard in Shanghai, 'poised' may not be the most appropriate word, with some cautioning that the timing is not at all certain.

For example, Lawrence Poh, CEO of Lei Shing Hong Machinery - Caterpillar's largest dealer in China and operator of a major rental business - told delegates that while he believes that exponential growth will come, challenges must be overcome first.

He said Lei Shing Hong's own rental business faced problems during its first 10 years, including the wrong product mix, higher than anticipated logistics costs, bad debts and competition from local players.

"It's not any easy journey. But if you are going to be a rental company in China you have to take the long term view," he said. His own view is that it could take a further 10 years before the rental business fully establishes itself.



Lawrence Poh, CEO, Lei Shing Hong Machinery

"If manufacturers and rental companies see rental as a strategy they should form long term partnerships, All players in this market must see rental as something we can grow together."

Another speaker at the conference, which was held at the Double Tree Hilton hotel the day before Bauma China, was Ken Lousberg, president of Terex Corp's Chinese business, which manufactures both cranes and aerial platforms.

Mr Lousberg said mega projects in China, including the new Disneyworld site in Shanghai and Samsung's Xi'an facility, would help develop the aerial platform rental market.

He said the conditions were in place for rapid growth of access rental, including an increased focus on health and safety, a drive towards greater efficiency and productivity in the construction sector, and the development of an infrastructure of supply of platforms through new rental companies.

"It's not enough to just sell or rent equipment, we have to make a difference", said Mr Lousberg, "The advantage we all have is that we are right at the beginning, which is very exciting and we truly think the future is bright."

Li Hua Bin, general manager at Shanghai Jinheyuan Equipment Rental, warned, however, that despite his own "very high hopes" for the Chinese aerial

Terex China president
Ken Lousberg



platform market, there could be a damaging rush into aerials; "Access platforms are not very sophisticated products so the risk is everyone sees it as an easy market to get into and rushes into it, and the market then gets saturated."

The keynote speaker was Masaki Kurita, CEO of Japan's Nikken Corp; while other speakers included Greg Parfitt, executive general manager for sales and specialist business at Coates Hire; and Zeng Guang'an, chairman of Guangxi LiuGong Machinery and president of Guangxi LiuGong Group.

IRN

Thank you

KHL and IRN would like to thank the following sponsors for the 2014 IRC conference:

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Confirmed for the 2015 event

Seven speakers have been confirmed for the 2015 International Rental Conference (IRC) taking place in Beijing on 21 September on the day before the BICES construction exhibition.

Enilson Moreira de Lima, CEO of A Geradora, one of Brazil's largest rental companies; Vivek Soni, co-CEO of Gemini Equipment and Rentals in India; Gary Kucher, CEO of Mongolia Holdings, the Hertz Equipment franchise holder for Mongolia; and Ni Xinli, Chairman of Jiangsu Tongyuan Machinery Sales and Service, a Chinese dealer and rental company, have all confirmed their participation.

In addition, Jia Li Cai (Managing Director, Machinery Management & Rental Division of the China Construction Industry Association), Jim Barr (Vice President/General Manager Greater China Sales and Service, Terex AWP), and Michel Petitjean (Secretary General of the European Rental Association) will participate.

The conference is supported by the BICES exhibition and by supporting associations IPAF and the Machinery Management & Rental Division of the China Construction Industry Association (CCIA). Sponsors for the 2015 conference are: Gold: Genie, Silver: JLG.



See who's at **PLANTWORX 2015** 2nd - 4th June New Venue Bruntingthorpe

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The ERA in 2015

The European Rental Association will organise a conference at April's Intermat show in Paris, and is also looking ahead to its annual Convention in Rome this June

This year, the European Rental Association (ERA) will organise a conference at the Intermat construction equipment exhibition on 23 April, from 14.00 to 16.00. The conference will consist of a detailed presentation of the work accomplished so far by the ERA equipment technology committee.

A debate will follow this presentation with a few invitees from rental companies and manufacturers.

The conference will be moderated by Murray Pollok, managing editor of *IRN*.

Meanwhile, in the morning of 23 April, a visit of a Loxam rental depot in the vicinity of Intermat will also be organised. Registration to the visit will open in the coming weeks, and will be announced by Intermat and ERA.

On April 22, some workshops will be organised between rental companies and manufacturers. The objective of these workshops will be to achieve tangible results in manufacturers' actions, facilitated by a clear communication from the rental industry. The idea is to speed up the development towards rental adapted equipment.

ERA Convention in Rome

Meanwhile, the next ERA Convention will take place in Rome on 3 and 4 June, 2015.

The headlight of this year's convention will be about "Sustainability as an Opportunity" and, as in previous years, we expect over 250 leaders from



The 2015 ERA Convention takes place in Rome, Italy, in June.

Europe's rental industry, representatives of national rental associations and suppliers to the industry to attend the event.

The general outline of the event (starting and end time) and some additional useful information are now available at:

<http://erarental.org/en/events/upcoming/era-convention-2015>.

The programme for the convention will be published when registration to the event opens.

However we can anticipate that roundtables will include:

- presentations of the Italian rental market,
- a workshop around Sustainability led by national rental associations and by Schuttelaar & Partners, the consulting firm mandated by ERA to assist in its Sustainability Project,
- a workshop around Telematics Standardisation with the participation of the Germany based trade association VDBUM.

The plenary session will be dedicated to the situation of our industry and its environment and will enlighten the attendees about Sustainability in the rental business. It will include a detailed report on the European rental industry. The guest speaker will be announced in the coming weeks, and as in Amsterdam in 2014, the Convention will be moderated by Nadine Dereza.

A table-top exhibition will be organised in the area where the social events of the convention will take place and different levels of sponsorships are available for the European Rental Awards dinners, as well as for the whole convention such as the lanyards and the programme of the convention.

The following Gold Sponsors of the European Rental Awards have already signed up, join them now!

- Ritchie Bros Auctioneers
- Hilti

- Trakkunit
- Perkins Engine Companies

For more information on sponsorship opportunities, prices and orders, please visit: <http://erarental.org/en/events/convention/era-convention-2015>.

European Rental Awards

Companies are invited to enter the eighth European Rental Awards. The deadline for entries is Friday 20 February, 2015. Entries will be judged in five categories, as follows:

- Large Rental Company of the Year (turnover over €15 million)
- Small/Mid-sized Rental Company of the Year (turnover under €15 million)
- Most Sustainable Rental Product (product launched in late 2013 or during 2014)
- Rental Person of the Year

In addition, the judging panel may present a Lifetime Achievement Award.

The awards are again being jointly organised by *IRN* magazine and the ERA. Companies and individuals are able to download entry forms and obtain award guidelines at www.khl.com/rentalawards and on the ERA's website (www.erarental.org).

ERA and the National Rental Associations

Finally, the ASEAMAC Forum takes place in Madrid on 28 January. After having held its first annual meeting, the Board of ERA will participate to a roundtable in the afternoon.

Also, the ERA together with IMDER, the Turkish Construction Equipment Distributors and Manufacturers Association, are organising two training days on 12 and 13 March, in Istanbul, Turkey.



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People news

from the world's rental industry



■ **Kevin Parkes**, CEO at UK-based rental company Hewden, is to step down, effective 31 January, 2015.

Mr Parkes, a former director at Finning (UK) took over at Hewden in 2009, leading the business after the sale to private equity company Sun European Partners. Mr Parkes said, "Through challenging times we have radically reorganised and rebuilt the business, relentlessly executing our strategy so Hewden is best placed to take advantage of the recovering market." Hewden said a further announcement was expected early in the New Year.



■ Travel and transport industry veteran **John Tague** has been appointed as the new CEO of Hertz, replacing Brian MacDonald, who became group interim CEO following departure of Mark Frissora earlier this year. Mr

MacDonald remains CEO of Hertz's equipment rental business, Hertz Equipment Rental Corporation (HERC). Mr Tague is a former president and CEO of United Airlines, and most recently served as chairman and CEO of transportation and logistics provider Cardinal Logistics Holdings.



■ A new chief executive has been appointed at Hyundai Heavy Industries Europe - **JC Jung** replaces the

recently-promoted SG Rhee, who will return to Hyundai Heavy Industries Korea. Jung, formerly global sales director for forklifts in Korea, moves to the European headquarters of Hyundai Heavy Industries in Geel, Belgium. One of Jung's first assignments will be to launch the new Tier 4/Stage IV-compliant range of Hyundai excavators, wheeled loaders and forklift trucks into the European market - the first territory to launch the new series.

HIRE 15 exhibition dates announced

Australia's Hire and Rental Industry Association (HRIA) has announced the dates for its 2015 exhibition - HIRE 15 Destination Success, set to take place at the Adelaide Showground from April 28 to 30, 2015.

The organiser said the event would include keynote speakers and daily industry seminars, as well as a showcase of equipment and services across the diverse rental industry, including live demonstrations.

"As the Australian economy shows continued signs of improvement across the board, and in the construction and infrastructure industries in particular, it is more important than ever to look to our industry's core strengths and learn how to work smarter and more effectively," HRIA CEO Phil Newby said.

"Building relationships and creating new networks is vital at times of economic stress and Hire 15 - Destination Success offers a crucial meeting point for the entire hire industry and associated markets in Australia," Mr Newby added.

HRIA said the event would culminate on 30 April, 2015 with the presentation and delivery of the Hire Industry Excellence Awards, which recognise outstanding achievement and industry excellence.



■ Centrica executive **Chris Weston** took the reins as CEO of temporary power provider Aggreko on 2 January, 2015.

Aggreko announced in May 2014 that it had appointed Centrica executive Mr Weston as its new CEO. It said Ken Hanna, currently executive chairman, would revert to his previous role of non-executive chairman when Mr Weston came on board at the start of next year.

Mr Weston was managing director of international downstream at energy conglomerate Centrica, running the group's largest division. In this role, he is operationally responsible for both British Gas in the UK and Direct Energy in the US.



■ US-based events rental company Classic Party Rentals has appointed **Brent Mumford** as its new CEO, effective

10 November. Mr Mumford replaces current CEO Jeff Black, who has left the company. Mr Mumford most recently served as vice president and general manager for manufacturer Sullair, and before that was CEO of Hi-Way Equipment Company. From 2002-2009, Mr Mumford worked at NES Rentals where he held multiple leadership roles including region vice president and vice president of operations.

■ US Battery Manufacturing has named **Michael Coad** as the company's new director of sales. Mr Coad has been with US Battery for nearly a decade, and in this new position,



will continue to grow the US Battery product line through the company's OE customers and distributor network.

Prior to this appointment, Mr Coad served as US Battery's Northeast and Midwest regional sales manager, and will temporarily maintain these accounts, while expanding US Battery's global reach.



■ JLG Industries has promoted **Jeff Ford** from global category director for boom lifts to director of global strategy and

business development. In addition, Corey Raymo, currently global category director for scissors, will become global category director for boom lifts. Finally, Paul Kreutzwiser has joined JLG as the global category director, scissors/verticals. Mr Kreutzwiser has more than 12 years of marketing experience in the AWP industry.



■ UK-based rental company Speedy Hire has appointed Russell Down as its new group finance director, succeeding Lynn

Krige who stepped down last summer. Ms Krige left the company following a tumultuous year for the group in the Middle East, where accounting regularities lead to a full-year loss for 2013. Speedy said Mr Down, who has been group finance director at design and engineering consultancy Hyder Consulting since 2008, would join its board from 6 April, 2015.

Frank Nerenhausen takes top spot at IPAF Summit

Frank Nerenhausen, president of JLG, will be the keynote speaker at the IPAF Summit in March 2015.

Mr Nerenhausen will explore emerging technologies and their potential application in the access industry under the title "Gimmicks or the Next Reality".

The IPAF Summit will be held on the same day as the International Awards for Powered Access (IAPAs) on 26 March 2015 in Washington, DC, US.

The IPAF Summit conference attracts senior representatives from the worldwide access industry to discuss and debate the latest technical, safety and business developments in the sector. The theme of the 2015 Summit is "New Technologies and New Markets".

Speakers will focus on how new technologies will change the face of the access industry in the next five to 10 years and look at how existing technologies are still battling to open up new markets around the world.

Speakers are being finalised, and will cover topics ranging from a report from Bulgaria on the battle to reclaim stolen MEWPs, a presentation from Turkey on the challenges of opening new markets to new technologies, and an update from IPAF on the latest developments in eLearning.

The full programme will be announced shortly. The conference will be held in

English, with simultaneous translation into Spanish. Attendance at the IPAF Summit conference is free. Register in advance at www.iapa-summit.info



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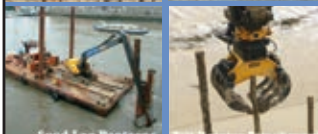
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