

INTERNATIONAL

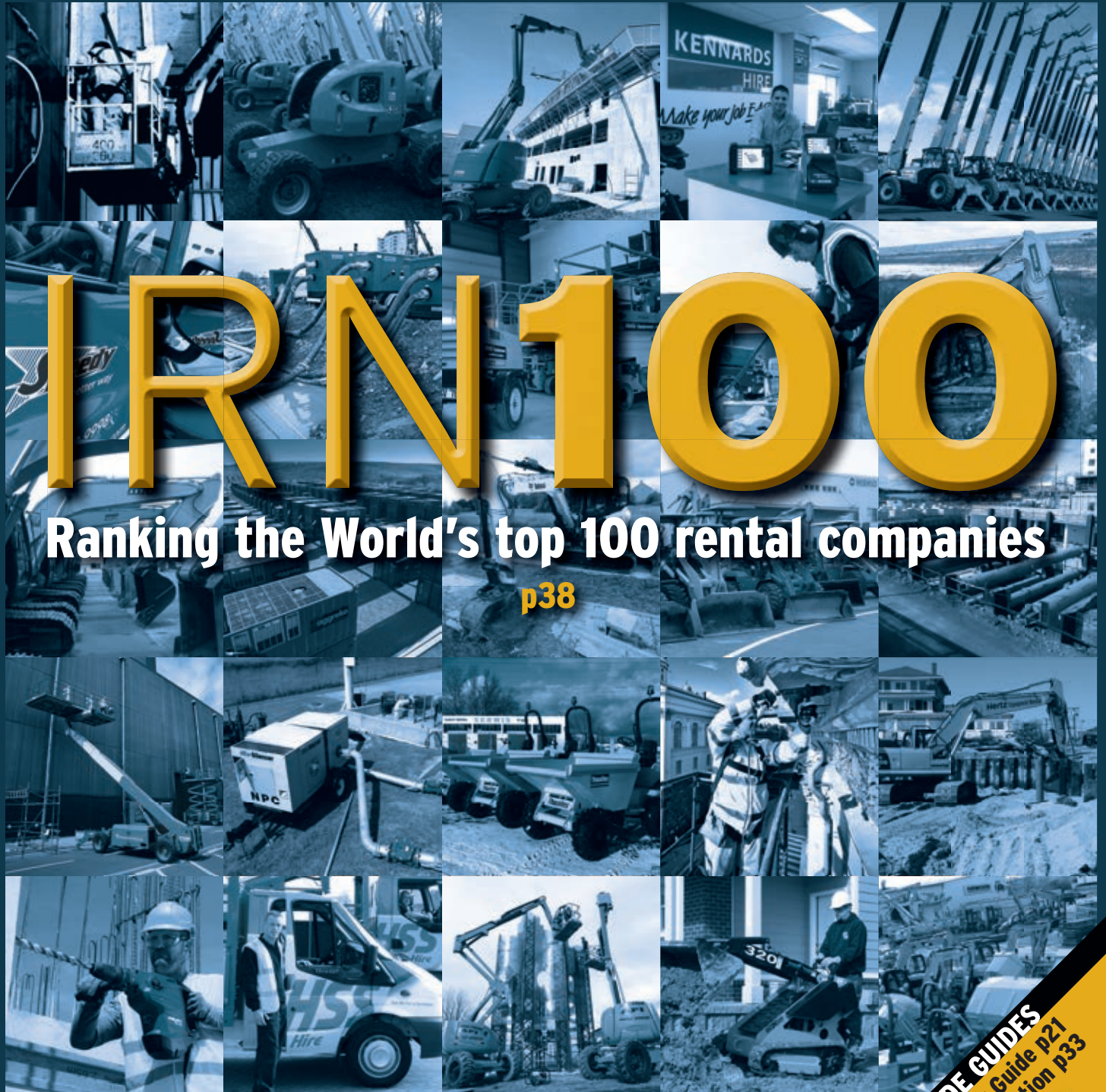
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# rental

NEWS

A KHL Group Publication

Volume 14 Issue 4 June 2014



# IRN100

Ranking the World's top 100 rental companies

p38

**INSIDE GUIDES**  
 IRE Show Guide p21  
 ERA Convention p33  
[www.ire2014.com](http://www.ire2014.com)

Official magazine of the ERA



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INSIDE: RENTAL TRACKER, APPLETON COLUMN



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# ...inside

**REGULARS****NEWS & KHL.COM ROUND-UP**

Kiloutou acquires Polish major; Boels Rental reports steady Italian growth; Lavendon announces 2014 fleet investment; Ahern Australia launched; plus other news from the world's rental sector.

**KEVIN APPLETON COLUMN**

Rental remains a logistics-centred industry, and needs to strive to get better and better at it. *Kevin Appleton* spells it out.

**INTERVIEW:  
DANNY JONES, OFF-GRID ENERGY**

Off-Grid Energy founder and managing director tells *IRN* how he is going about convincing rental companies of the benefits of using hybrid systems for power generation.

**rental tracker ERA/IRN RENTAL TRACKER**

The RentalTracker for the first quarter of 2014 should bring further comfort to the European rental industry.

**ERA PAGE**

The National Associations Committee has decided on a list of EU issues to which it will pay particular attention. ERA reports on progress so far.

**FACES & PLACES**

New CEO planned for Aggreko, new director of operations at Wynne Systems, re-appointed independent director for Manitou, and other people news from the global rental industry.

**HOW TO SUBSCRIBE TO IRN**

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■ See page 8 for more on [khl.com](http://khl.com).

**FEATURES****INTERNATIONAL RENTAL EXHIBITION (IRE): STOP PRESS**

There has been a strong response from exhibitors ahead of the IRE in Amsterdam on 24-26 June, with the show now expanded to accommodate demand for space.

**ERA CONVENTION/  
EUROPEAN RENTAL AWARDS**

The latest programme for the ERA's Amsterdam Convention, plus details of all the companies shortlisted for the European Rental Awards, being held on 25 June at the same time as the ERA convention and IRE show.

**IRN100 SURVEY**

This year's keenly-awaited IRN100 survey of the world's top rental companies, based on revenues in 2013.

**PRODUCT FEATURE:  
MINI EXCAVATORS**

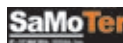
*IRN* reports on some of the latest rollers, plate compactors and rammers on the market, with a special focus on rental-friendly products.

**PRODUCT FEATURE: AERIAL PLATFORMS**

The worldwide market is picking up, albeit slowly, and manufacturers are innovating to meet new trends. *Euan Youdale* reports.

**SMOPYC & SAMOTER: REVIEWS**

The recent SMOPYC exhibition in Spain and Samoter show in Italy were tests for the markets in both countries, as well as for Europe as a whole. *IRN* reports.

**INTERNATIONAL RENTAL CONFERENCE (IRC): LINE-UP COMPLETE**

Senior figures from the global rental industry will speak at November's event in Shanghai.

**...outside**

Our exclusive IRN100 survey reveals that last year was relatively stable for rental companies. Turn to page 28 to find out the results.



## DIARY DATES

2014

**INTERNATIONAL RENTAL EXHIBITION (IRE)**

24-26 June, 2014.  
Amsterdam, NL  
www.ireshow.com

**ERA CONVENTION**

24-26 June, 2014.  
Amsterdam, NL  
www.erarental.org

**APEX**

24-26 June, 2014.  
Amsterdam, NL.  
www.apexshow.com

**EUROPEAN RENTAL AWARDS**

25 June, 2014.  
Amsterdam, NL  
www.khl.com/rentalawards

**EUROPLATFORM ACCESS RENTAL CONFERENCE**

25 September, 2014.  
Cologne, Germany.  
www.europlatform.info

**THE SHOWMAN'S SHOW**

22-23 October, 2014.  
Newbury, UK.  
www.showmans-directory.co.uk

**ACCESS, LIFT & HANDLERS CONFERENCE AND AWARDS**

November 11, 2014  
Miami, FL  
www.khl.com/alh-ca

**INTERNATIONAL RENTAL CONFERENCE (IRC)**

24 November, 2014.  
Shanghai, China  
www.khl.com/irc

**BAUMA CHINA**

25-28 November, 2014.  
Shanghai, China.  
www.bauma-china.com

2015

**THE RENTAL SHOW**

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

**IAPA AWARDS 2015**

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

**INTERMAT**

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

2016

**BAUMA**

11-17 April, 2016.  
Munich, Germany.  
www.bauma.de

# Kiloutou acquires Polish major

France-based Kiloutou has acquired EWPA Majster, a leading equipment rental company in Poland.

Founded in 1989, EWPA Majster operates 20 branches in Poland with a fleet of more than 4400 machines.

The existing Kiloutou Polska and EWPA Majster will retain their operational independence until the merger is complete when both will operate under the EWPA Majster brand. The companies will immediately start co-operating on a commercial level.



Xavier du Boys, CEO of Kiloutou Group, said, "This acquisition gives a great boost to our development in Poland. Through national coverage it enables us to effectively meet the

needs of large accounts. I am very pleased to welcome the crew of EWPA Majster Kiloutou."

Przemyslaw Atraszkiewicz, founder and majority shareholder of EWPA Majster, added that Kiloutou's acquisition would provide resources which would allow the company to grow stronger. "I am confident in the ability of the teams to make this combination a success. Good luck to Kiloutou Group in the Polish construction equipment rental market under the EWPA Majster brand."

## Tunisian rental leader plans to reach 100 machine fleet

Parenin, Caterpillar's dealer in Tunisia, expects its fleet to break the 100 machine-mark within the next two years. This may not sound like many by European, Japanese or US standards, but it is believed to be Tunisia's biggest rental fleet.

As a company Parenin can trace its roots back to 1902, and it has been a Cat dealer since 1926. It established its rental fleet in 1999 with ten machines and today has 70 assorted backhoe loaders, dozers, excavators, graders and wheeled loaders available for hire with an operator.

Mustapha Farjallah, Parenin's manager for rental and used equipment, said, "We will continue with operators for a few years at least. Now we have Vision Link (Cat's telematics system), we might be able to change things and use that to follow the machine and track maintenance. But for now we have 70 machines and 70 operators."

He added, "We have lots of new business opportunities. There are highways being built as well as a gas pipeline and we need to be ready for that. I will reach 100 machines within two years. We have a lot of business because Tunisia is a permanent job site these days," he said.

## Lavendon announces 2014 fleet investment

Global rental company Lavendon Group will invest more than UK£55 million (€65.7 million) in powered access equipment in 2014.

The investment will see around 1360 new units enter its rental fleet across its European and Middle East territories. In the group's European

operations (UK, Germany, France and Belgium) the new units will largely replace older units as part of an ongoing fleet replenishment programme, said the company.

For instance, Nationwide - the company's UK business - plans to invest £24 million (€28.6 million) in its fleet this year.

Most of the new units will be boom lifts with working heights up to 40m. Some new scissor lifts and vehicle mounted platforms will also enter the fleet, as well as a selection of new telehandlers for the group's operations in Belgium and France.

The group's Middle East fleet will continue to be expanded as the business looks to meet rising customer demand for safe and effective access solutions in the region. Some of the new units have already entered the group's fleet of more than 20000 units.



Ahern Australia was officially launched at the annual HRIA Convention 2014, which took place at the Gold Coast Convention Centre, Queensland.

It is the new name for the Snorkel Australia direct sales and service entity, which was acquired by Xtreme Manufacturing in October 2013, and will distribute Snorkel products in the region. The existing Snorkel Australia facilities and personnel will all remain under the new name.

"The major advantage of the Ahern Australia name is that it will allow us to easily distribute Xtreme telehandlers through the same channels. This presents a good opportunity in Australia, where there is a strong demand for high capacity telehandlers," said a company spokesman.

Ahern Australia had a strong presence at the HRIA Convention 2014, named HIRE14, and organised by the Hire & Rental Industry Association (HRIA).



## IRC line-up completed

The full-line-up for the 2nd International Rental Conference (IRC) in Shanghai, China, on 24 November is now complete and features senior representatives from rental companies in China, Australia and Japan as well as global equipment manufacturers.

**Leigh Ainsworth**, CEO of Coates Hire, will give the morning keynote address on rental management issues and **Masaki Kurita**, president of Japan's Nikken Corp, will present the afternoon keynote speech looking at trends in Japan's rental sector.

The conference, which takes place the day before the start of the Bauma China exhibition, provides an opportunity to learn about the development of rental in China and wider Asia as well as offering world-class advice on rental management.



China's rental market is represented by three speakers who manage significant rental businesses: **Laurence Poh** (pictured left), CEO of Caterpillar dealer

Lei Shing Hong Machinery; **Li Hua Bin**, general manager of Shanghai Jinheyuan Equipment Rental; and **Tim Du**, founder and managing director of Tianjin Prosperity Bai-Li Engineering & Mechanical.

■ For full details of the programme and confirmed speakers, see page 73 of this issue, or go to:

[www.khl-group.com/events/irc/](http://www.khl-group.com/events/irc/)

## Boels Rental reports steady Italian growth

The Italian rental market has potential according to Boels Rental, which has seen steady growth since it began operating in the country in 2011, with further expansion planned.

Boels Rental opened its first depot in Italy in November 2011, followed by two more in 2012. Speaking during the Samoter and Asphaltica construction equipment exhibitions in Verona, regional manager for Italy Tarcisio Sciocco said the company planned to open at least one more depot in 2015.

"We started from zero in the middle of a bad period, so we are of course growing. The crisis has caused Italian customers to realise the value of rental instead of buying machines.

"Ownership is not so important now, and instead there is a big potential for rental. For instance, some customers have sold off all their machines as used equipment, and have decided to go over to rental."

Mr Sciocco said the company had already seen revenues jump 50% in the first four months of 2014, compared to last year.

"Rental rates are very low still, but for us as a newcomer, every rental deal adds something," he added. "Our rental fleet is currently worth around €3 million, but this will be increasing because of our expansion plans.

Boels Rental offers earthmoving and access equipment to rent in Italy, together with smaller products like compressors, concrete mixers and

The 29<sup>th</sup> edition of Italian



construction equipment exhibition Samoter was teamed with the Asphaltica road paving technology event. The combined exhibitions ran from 8 May to 11 May - for a full review of this exhibition and April's SMOPYC exhibit in Spain, see page 68.

## HIGHLIGHTS

■ Werner Scheepers, formerly general manager of MCC Group's Plant Hire division in South Africa, has left the company to establish his own rental business. The new venture, which was registered in March this year, is Eco Plant Hire and is still in its "infant stages".

■ IPAF is recommending that aerial platforms be subject to 10 year 'major inspections' followed by five-yearly inspections. IPAF said this would validate the structural integrity of critical components beyond the manufactured design life and help ensure the quality of machines sold in the used market. Similar regimes are already in place in Australia, Finland and Canada.

## New Editor for *International Rental News*

KHL Group, the publisher of *International Rental News (IRN)*, appointed Helen Wright as the new editor of the magazine, effective 6 May.

Current Editor Murray Pollok becomes *IRN*'s Managing Editor and will also take on the additional role of joint Events Director at KHL, one of the team responsible for organising conferences and other events across the group's magazines.

Ms Wright, who takes up her new post on Tuesday 6 May, joined KHL Group in November 2010 as Deputy Editor of *International Construction (iC)* and *Construction Europe (CE)* magazines, and has proven herself to be a highly capable and energetic journalist. A new Deputy Editor is now being sought for *iC* and *CE*.

■ Helen Wright, who is a fluent German speaker, can be contacted by e-mail at: [helen.wright@khl.com](mailto:helen.wright@khl.com), and on: +44 (0)1892 786209.

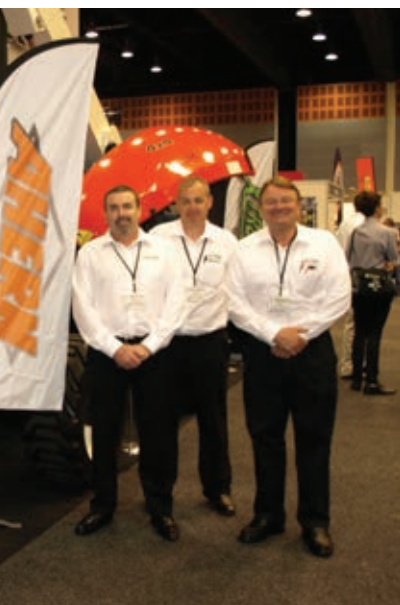
■ Murray Pollok's contact details are unchanged: [murray.pollok@khl.com](mailto:murray.pollok@khl.com), and Tel: +44 (0)1505 850043.



## IRN Rental Share Index

COMPANY		SHARE PRICES			
		Start date 11/1/06	Previous mth 01/04/14	Current mth 22/05/14	% change
Acces Industrie (France)	€	0.47	3.52	3.60	+2.7%
Aggreko (UK)	£	2.75	15.03	17.01	+13.2%
Ashtead Group (UK/US)	UK£	1.83	9.75	10.43	+6.9%
Boom Logistics (Australia)	A\$	3.70	0.15	0.13	-13.3%
Cramo (Fin)	€	13.0	15.60	15.47	-0.8%
GAM SA (Spain)	€	8.00	0.77	0.65	-15.6%
GL events (France)	€	29.96	16.48	17.20	+4.4%
H&E Equipment	US\$	-	40.27	32.40	-19.5%
Kanamoto	Yen	-	3035	3700	+21.9%
Lavendon (UK)	UK£	2.20	2.42	2.12	-12.4%
Mobile Mini (US)	US\$	46.2	44.48	40.83	-8.2%
Ramirent (Finland)	€	23.43	8.36	7.90	-5.5%
Speedy Hire (UK)	UK£	8.32	0.59	0.55	-6.8%
United Rentals (US)	US\$	24.9	96.02	97.47	+1.5%
<b>IRN INDEX</b>		<b>100.0</b>	<b>274.5</b>	<b>285.2</b>	<b>+3.9%</b>

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



# News from khl.com

## MANUFACTURERS

■ The 20 millionth engine produced by Perkins, a 1206 two-stage turbo Tier 4 diesel engine, has rolled off the production line at the company's facility in Peterborough, UK, 81 years after the brand was established. Perkins said that at least 4.5 million of the engines it had made were still in service. It has the capacity to manufacture 800,000 engines a year from its facilities in the UK, US, Brazil and China. Perkins became a wholly owned subsidiary of Caterpillar in 1998.

■ HM Plant, the UK dealer for Hitachi Construction Machinery (Europe) - HCME - has been renamed Hitachi Construction Machinery (UK), with effect from May 1, 2014. The company's new identity will also be introduced across its network of 11 depots across the UK. Hitachi Construction Machinery (UK) will continue to supply the complete range of Hitachi construction equipment, including mini, medium, large and wheeled excavators, wheeled loaders and dump trucks.

■ Hyundai Cummins Engine Company (HCEC), a joint venture between construction equipment maker Hyundai Heavy Industries and diesel engine manufacturer Cummins, has completed construction of a 78,045 m<sup>2</sup> engine factory for earthmovers in Daegu, South Korea. The KRW100 billion (€71.5 million) factory will supply Hyundai with engines for its equipment and is capable of producing 50,000 diesel engines each year.

■ Caterpillar reported revenues of US\$13.2 billion (€9.6 billion) for the first quarter of 2014, a flat result compared

## RENTAL ROUND-UP

■ Flannery Plant Hire has placed an order for 204 new Caterpillar machines from UK dealer Finning in a deal worth £15 million (€18.3 million). Flannery said it decided to increase its fleet to bring it in line with new emissions regulations, as contractors sought environmentally friendly equipment. Pat Flannery, director of Flannery Plant Hire, said the company had experienced significant demand for environmentally friendly rental equipment. It now has a rental fleet of over 1,600 units.

■ Hertz Equipment Rental Corp (HERC) has expanded its Saudi Arabian operation, Hertz Dayim Equipment Rental (HDER), with the opening of a greenfield location in the capital, Riyadh. HDER is a joint venture between HERC and Dayim Systems that opened in the country three years ago, and already has depots in Dammam and Jeddah. The new Riyadh operation is located on the Khurais highway, to the east of the city, and featured a 7000 m<sup>2</sup> yard, shop and branch office.

■ Finnish manufacturer Avant Tecno has launched a pilot equipment rental project in the UK - Avant Hire, and has plans to expand this business into other countries soon. Avant Hire offers discounted packages of Avant machines to existing rental companies, as well as marketing support and business development advice. The idea is that both parties proactively work together to grow the Avant Hire fleet, together with other Avant Hire partners.

■ Speedy Hire chairman Ishbel Macpherson will step down following a tumultuous year for the group in the Middle East. The announcement came in Speedy's end of financial year results which saw a loss of £4.3 million (€5.1 million) in its International Division as a result of the actions of a small number of employees who have now left the business. Ms Macpherson has been with Speedy for seven years, the last three of which were as chairman. She will step down when the interim results are announced in November.

to 2013. Net profit for the period was up 5% year-on-year to \$922 million (€673 million). The modest overall figures masked a jump in revenues from the company's construction industries division, where sales were up 20%

to \$5.06 billion (€3.7 billion), fuelled by a 36% increase in North American sales to US\$2.09 billion (€1.52 billion). The construction industries result was tempered by another fall from the resource industries business.

■ Longer versions of these stories, plus hundreds of others, can be found at [www.khl.com](http://www.khl.com). The site has dedicated sector pages for Rental, Construction, Access, Cranes and Demolition. (See: <http://tinyurl.com/pazyp8t>)



## MARKETS

■ First estimates from Eurostat show that March's seasonally-adjusted production in the construction sector fell 0.6% compared to February in the Eurozone, and 0.5% the EU28. In March 2014 compared with March 2013, production in construction increased 5.2% in the Eurozone and 5.3% in the EU28. The largest year-on-year increases were registered in Slovenia (44.9%), Hungary (34.1%), Spain (19.1%) and Poland (18.4%), with the strongest decreases seen in Portugal (13.8%), Sweden (2.8%) and Italy (1.4%).

■ The PCA - formerly the Portland Cement Association - forecasts US cement consumption will increase 7.9% this year. This is almost double last year's 4.5% growth rate, and the association expects similar steady increases in demand for the next five years. PCA chief economist and group vice president Edward Sullivan said, "There is considerable evidence that the economy's growth path has softened during the past several months, but we believe that the underlying economic fundamentals are stronger than the data suggest."

■ The value of construction put in place stood at US\$943 billion (€688 billion) in the US for the 12 months to the end of March. This was an 8.4% increase on the same point last year, according to data from the Census Bureau. Most of the gains came from the residential construction sector, which was up 15.2% to the end of March. Private construction output was up 12.5% compared to a year ago, while publicly funded construction was down 0.8% compared to a year ago.

## Rental information from IRN

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

### Digital magazine

IRN can be read in digital format either as a downloadable PDF document or read online with easy-to-use page turning technology. The latter version also allows readers to highlight and print out selected stories or e-mail items to contacts. To receive the digital version free of charge register at: [www.khl.com/subscriptions/free-digital/](http://www.khl.com/subscriptions/free-digital/)

### Online news

KHL's team of 10 journalists in Europe, North America and South America are constantly uploading stories to KHL.com. The site has dedicated pages for Rental, Construction, Access, Cranes and Demolition.



### Weekly newsletters

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rental newsletter

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**\*Key highlights include:**

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- Slide away platform for service access
- Traversing deck increases reach and provides up and over capability
- Excellent accessibility to all major components so that maintenance and serviceability have reduced turn around time
- Working heights between 5.68 m (18') and 6.68 m (21'7")

\*Some features model dependent

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# Navigating business logistics

**Rental remains a logistics-centred industry, and needs to strive to get better and better at it. Kevin Appleton spells it out.**



**Q**uite a lot of my time is now spent back in the world of third-party logistics, which has caused me to reflect some more on how well or otherwise we tackle this area in the rental industry. I suspect, firstly, that when we think of logistics our mind immediately turns to transport.

Of course in the rest of the world there is much more to it than that. A dictionary definition of business logistics would read something like “ensuring the right inventory is made available to customers, at the time they want it and at the lowest possible cost to provide”.

Starting at the beginning, if the first objective is to ensure we have the inventory the customers want (and that we have set ourselves up to provide - not every business wants to be offering 35 m booms or large-capacity tower cranes - and have targeted our customer base accordingly) in places where we can get it to the customer.

This means ensuring that each location, as far as is economically justifiable, has immediate access to the inventory its customers want to rent on a day-by-day basis.

## Stock out positions

A small depot with a fleet of, say, 100 tools or 80 aerial platforms is always likely to be in a “stock out” position, where the customer’s core demands frequently cannot be satisfied from their local inventory and where the choice then has to be made between letting the customer down, sourcing from a competitor (if they are willing to supply) or shipping down from the next nearest depot.

The more efficient operators will have accurately profiled what their customer base wants to be able to rent and how much they have to hold to satisfy core demand plus a small safety margin.

This is often a source of confusion and, I would say, error amongst non-logistics professionals, including many in the rental industry. There is often an assumption that the best service will be supplied by being physically close to the customer, which tends to then be interpreted as lots of relatively small - in fleet terms - depots.

The truth is, of course, that even in tool hire 80% plus of business is

done on a delivered, rather than collect, basis and so the customer has no idea, and even less interest, in where the equipment is delivered from.

The goal, as every significant retailer has discovered, is to find the optimum balance between holding inventory close enough to the customer to be able to react quickly, but not to the extreme of having a warehouse attached to every single “shop”.

The impacts of getting network configuration wrong are, in my view, what allows space for the local independent operator to continue to thrive.

## Volume and mix

These smaller companies tend to be expert at getting exactly the right volume and mix of fleet for their local customer base and, because they’re not obsessed with their “national network” they consequently end up with much more effective operations than the neighbouring local depot of the national operator who never has quite enough of the right stuff in stock.

Once the depot operation is set up effectively (not too small, not too far from the customer base it is trying to serve), the challenge of running effective transport operations is next on the list, as this is typically the biggest area of truly variable cost for rental businesses.

I think the industry has taken tremendous strides in this area over the last few years. It is much less common now to see trucks leaving full in the morning and returning empty, followed by leaving empty in the afternoon and returning full. The key area of cost optimisation is being able to combine delivery loads and link these to collections waiting to be made so that vehicles are never run empty.

I think there is still a lot to be done with rental company networks in terms of scale and efficiency and this will continue to be a focus over the coming years.

It may even be that we see third party logistics operators coming in to run some transport activities for rental companies although, even working for a logistics operator, it is hard to see how they can bring a lot of added value to the operation of specialised transport equipment across large numbers of locations.

In any event, we remain a logistics centred industry, and we need to strive to get better and better at it.

**IRN**

**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](mailto:IRNfeedback@khl.com)

Danny Jones, founder and majority owner of Off-Grid Energy, at the company's workshop in Rugby, UK.

Danny Jones of Off-Grid Energy tells *IRN* how he is going about convincing rental companies of the enormous cost and environmental benefits in using hybrid systems for power generation.



# Time for hybrid?

**Y**ou would think that a new power generation technology offering a cocktail of reduced fuel use, lower noise, fewer operating hours on diesel gensets and lower CO<sub>2</sub> emissions would be welcomed with open arms by the specialist power rental market.

In fact, Danny Jones, founder and managing director of Off-Grid Energy - the UK company that is among the pioneers of hybrid, battery powered technology - tells *IRN* that while generalist renters have been welcoming, it is the niche power rental community who have been among the most sceptical.

"Nobody has ever told us that we are mad, or that it will never work. People have been helpful - except for some in the generator rental sector", he says with a grin.

It is difficult to second-guess the reasons for that - it might relate to the impact on the sale of diesel fuel

that is an intrinsic part of the power rental business, or the disruptive effect on existing generator fleets. Whatever the motivation, it isn't deterring Mr Jones from a crusade on behalf of hybrid technology that has already met with considerable success, including a supply agreement with A-Plant in the UK and sales as far afield as Australia.

## Grid-to-go

Established five years ago, Off-Grid Energy has now built around 200 hybrid units, assembled at a workshop in Rugby, UK, where he employs a small workforce of around 12 people.

The 'Grid-to-Go' hybrid sets use battery packs that are linked to conventional diesel generator. The batteries can either operate alone when the power demand is low - which reduces the amount of time that the generator is operating at inefficient low loadings - or augment the power offered by the diesel set. The batteries are recharged when the diesel set is working. The cuts in operating hours on the genset reduces maintenance costs and extends its economic life.

Mr Jones says fuel use reductions will closely follow the reductions in run time - for example, a 20% reduction in fuel consumption if the run time is cut by 30%, and 70-75% reduction for an 80% cut in running times. Consider that burning 1 litre of diesel generates around 2.65 kg of CO<sub>2</sub> and you see the potential environmental benefits, never mind the cost savings.

He says the technology is most suitable for genset applications of more than 20 kVA - smaller sets typically have a more consistent loading, with reduced benefits. "Where it really works is when there is significant variation between loads during the day", he says.

Battery technology is key to the system, and Off-Grid uses three different types, depending on the application and the customer. The least expensive is AGM lead-acid batteries, which will operate for around 600 charging cycles, giving them a two year



The partnership with A-Plant has been key to getting Off-Grid established in the rental market.



lifespans and making them best suited to the events market. Next comes the gel lead-acid option, with a 2000 cycle lifetime, which are ideal for the general rentals market. Lithium Ion versions, with a typical 6000 cycle life, are much more expensive but the favoured solution for customers in the power utility sector, such as SSE in the UK. These batteries also have a much quicker recharging time.

For Mr Jones, getting to the point of offering a commercial product has taken many years and is the fruit of a very particular set of work experiences. He started his career working for GEC on instrumentation of large drive systems, including one major project to refurbish the QE2 ocean liner. From there he was lured into the marine industry, designed on-board power systems for yachts and narrow boats: he helped draw up the UK code for electrical installations in small vessels.

"My knowledge base was refined in squeezing sophisticated electrical equipment into small places in harsh environments - salty, wet, hot, with vibrations", he explains, "That gave me a lot of special knowledge in how to create reliable electrical installations in difficult environments."

That led to a wider interest in 'off-grid' power sources, which accelerated when renewables began to attract financial incentives from government. His knowledge of genset manufacturers like SDMO and Pramac gained through his marine career also exposed him the scale of the genset rental market.

"We'd had success in cutting fuel consumption in fixed off-grid situations", he says, "So I thought, 'If we can do that in mobile generators then we have an opportunity'."

### Early prototype

He formed Off-Grid Energy and took a prototype hybrid set to the Executive Hire Show in 2010, where the positive response encouraged him to forge ahead. In the four years that have followed, Off-Grid has secured a major supply agreement with A-Plant as well as with SSE, which is using the hybrid solution on its emergency back-up units. (The SSE contract has also helped rubber-stamp the technology, with the hybrid units being successfully tested by the Power Networks Demonstration Centre (PNDC) run by the University of Strathclyde with funding partners including SSE and Scottish Power.)

The priority is to introduce the system to wider rental markets worldwide. The benefits are clear, but the hybrid sets are not cheap at around £20000

(£24000). In the case of A-Plant, the company was initially cautious about the reliability of the systems, so wanted a faster economic return than would otherwise be the case for a new product. Mr Jones says A-Plant's experience after a year of operating the systems has been good, and it will further invest this year, but it has focused his mind on how to create a model that works for rental.

"Batteries are critical components: our strength is understanding different battery technologies - how to use it, maintain it", he tells IRN. What this boils down to is what Mr Jones calls "servitisation" - a horrible word, but important idea; "It's about taking a technical product and turning it into a commercial solution. What we need to do, at the front of the wave, is to give the rental industry confidence in determining residual values.

"Servitisation is about package our knowledge



Off-Grid engineers test a lithium-ion battery system that will be used by power utility SSE.





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of what has happened to the battery, to sell to the owner of the asset, with a guarantee of performance of performance and residual value - the life left in the battery and other components." Off-Grid could then replace the batteries, if required, and sell the old units on to new markets. Mr Jones makes the point that the hybrid units themselves have no moving parts, no consumables or serviceable items, aside from the battery.

In the UK, Off-Grid remotely monitors the units and will alert a customer or site manager if any action is required. Site visits are undertaken if necessary. Remote monitoring can be global, but for site visits Off-Grid is now talking to three or four companies about developing partnerships to deliver the physical support.

A typical annual service cost might be anywhere between £500 and £1000 a unit, although customers could choose to train their own staff; "We can supply



A Grid-to-Go unit was used at the UK launch of a Renault electric car.

the tools to do this", says Mr Jones. A rental company is less likely to take it in-house, he says.

Off-Grid is now talking to potential rental customers in mainland Europe, with the 'Rental Product of the Year' award at last year's European Rental Awards giving the company some welcome publicity; "There does seem to be a flow of interest starting...there is a real appetite for something that gives a company a unique selling point over the competition."

### Three-phase version

A three-phase version for mainland Europe is one of the latest developments and more powerful versions, possibly up to 120 kVA, which would be coupled with a 500 kVA genset, are on the cards. Also being considered is a system to network the hybrid module alongside a series of connected diesel generators.

He is getting some enquiries from the marine market, which would be something of a return to his roots. Likewise, he sees applications in lots of other

sectors where off-grid energy is required, such as in remote sites or where the prime source of power is unreliable. (Mr Jones has sent some units to Haiti where they are being used to power hospitals.)

The investment required to get the business up and running means that profits have taken a back seat during the development stage, but expects that to change; "We would expect to show a profit at the end of this year, with the order commitments we have. We could have a big turnaround by 2015 - that's what we expect to see."

The task ahead for Mr Jones is to continue to convince customers of the technology, although he acknowledges that "you need to be a geek to appreciate the engineering". That makes it something of a paradox that it is the specialists in the power rental sector - the 'geeks' if you like - who are proving hardest to convince.

Anyway, Off-Grid Energy is managing fine without them, for the time being. And for Danny Jones there is pleasure enough in being a pioneer; "We've created something wonderful, and I really like that."

**IRN**

Off-Grid Energy assembles the hybrid power units at a small facility in Rugby, close to Birmingham, UK.



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## The ERA/IRN RentalTracker survey for the first quarter of 2014 shows a continuing positive trend. Murray Pollok reports.

### Optimism

#### FORECAST FOR 12 MONTHS AHEAD

(LAST QUARTER RESULTS IN BRACKETS)

	'Much better'	'Better' or 'much better'
<b>UK</b>	<b>37%</b> (32%)	<b>100%</b>
<b>All Europe</b>	<b>13%</b> (14%)	<b>56%</b>
<b>Spain</b>	<b>14%</b> (12%)	<b>71%</b>
<b>Nordic</b>	<b>18%</b> (7%)	<b>73%</b>
<b>Benelux</b>	<b>10%</b> (7%)	<b>60%</b>
<b>Multinationals</b>	<b>20%</b> (6%)	<b>60%</b>
<b>France</b>	<b>0%</b> (3.7%)	<b>14%</b>
<b>Italy</b>	<b>0%</b> (0%)	<b>50%</b>

### The survey

In total approximately 160 companies in Europe responded to the ERA/IRN RentalTracker survey for the first quarter of 2014. The survey was carried out at the end of March, beginning of April.

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

- Assodimi (Italy)
  - ConfalQ (Spain)
  - Construction Plant-hire Association (CPA) (UK)
  - DLR (France)
  - Hire Association Europe (HAE) (UK)
  - RusRental (Russia)
  - Norwegian Rental Association
  - Danish Rental Association
  - The Association of Finnish Technical Traders
- 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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# UK leads the way

Perhaps no shouting from the rooftops, but the RentalTracker for the first quarter of 2014 should bring further comfort to the European rental industry, with a continuation of the generally positive trend of the past half year and particularly encouraging results from large, multinational rental companies and businesses in the UK.

There are also the first - modest - signs of life in Spain, with clear majorities reporting improving year-on-year utilisation rates and activity levels. There was still a negative balance of opinion on current business conditions - more reporting deteriorating conditions than were reporting improvements - but not by much. It should be noted that the Spanish sample size is not large, so these first positive signs should be treated with caution.

The less happy markets of recent times remain so: Italy is either bottom or second bottom of every measure - activity levels, current conditions, utilisation trends, investment plans and recruitment plans. France, too, seems to remain a flat market,

with companies here among the least optimistic: none expected business to be 'much better' 12 months from now and only 14% were prepared to say 'better', which was the lowest in the whole region. Likewise, few French companies were reporting improvements in time utilisation (just 14%). French companies were also reporting the worst balance of opinion on current business conditions, with a negative balance of -33%.

Overall for Europe, in terms of revenue expectations for the full year, there has been a definite improvement in sentiment, with almost half of all respondents expecting an increase in full-year sales and just 11.6% expecting a fall.

Here, 89% of UK companies expect full year revenue improvements, followed by Nordic companies (73%), multinationals (65%), Benelux (60%) and Spain (57%). This contrasts with the much flatter expectations in Italy and France, where just 22% and 14% of companies, respectively, expected full-year gains.

FIGURE 1

## Expectations for year from now

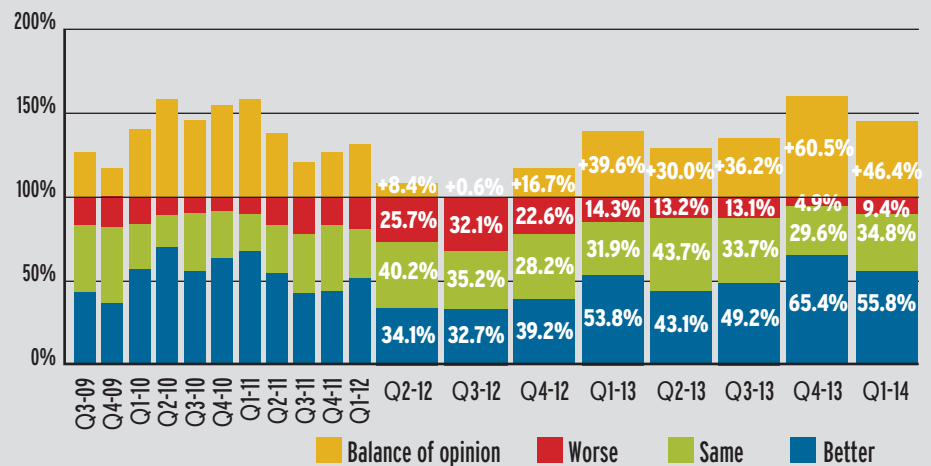
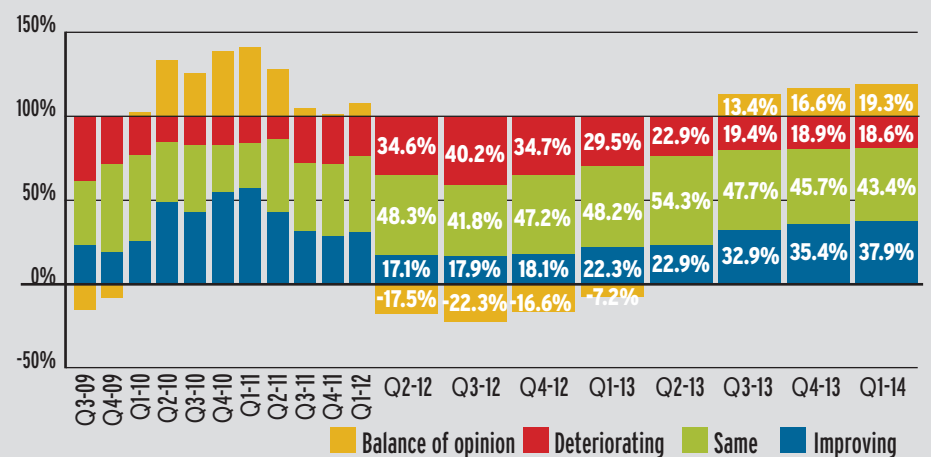


FIGURE 2

## Business conditions now



The survey was conducted in the final two weeks of March and the first week of April, and generated around 150 replies. Although still a good response, this is around 30-50 less than in previous surveys. There are two reasons for the reduction: first, for technical reasons we had no responses from Russia (we hope to resume normal service in the next survey), and second, we changed our method of distributing the survey in the Benelux region. Again, we hope to recover these lost respondents in the next survey.

The loss of the Russian results has a bearing on the overall results for the region, because Russian rental companies have been among the most positive over the past years or so.

**Positive trend**

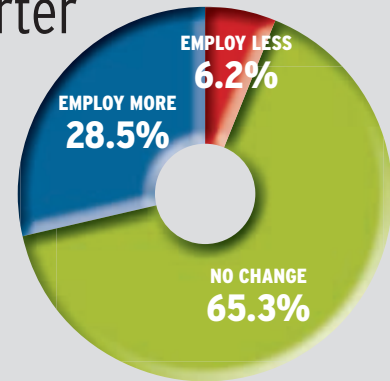
Looking at the total results for Europe, there are again reasons to be cheerful. The balance of opinion on current business conditions remained positive and marginally higher than the previous quarter.

In addition, employment intentions have firmed

**FIGURE 5**

**Employment intentions for next quarter**

Asked end of Q4 2013



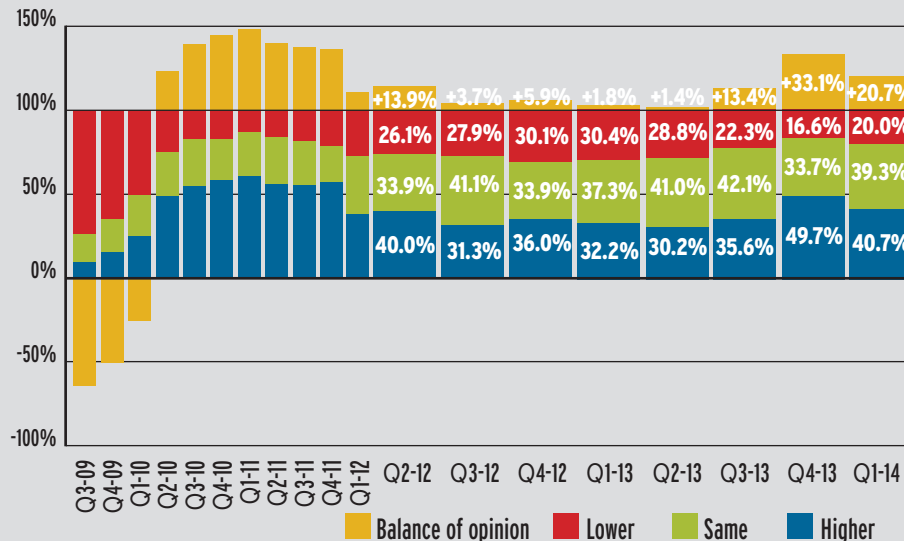
up for the third quarter in a row, with 36.4% of all respondents expecting to recruit more staff in the second quarter of this year: the positive balance of +28.1% is the highest for three years.

There was a fall in the positive balance of opinion on business activity levels year-on-year in the first quarter, down to +20.7% from +33.1% at the end of 2013. Even so, double the number of companies reported increases in first quarter activity than reported deteriorations. It is likely that the absence of Russian responses had an impact on this measure.

There has also been a small increase in fleet investment intentions, with 34% of all companies

**FIGURE 3**

**Quarterly activity year-on-year**



**TABLE 1**

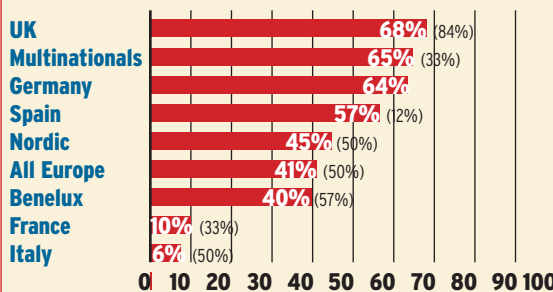
**Regional Trends**

**BALANCE OF OPINION ON BUSINESS CONDITIONS (END Q1, 2014)**  
(previous quarter in brackets)

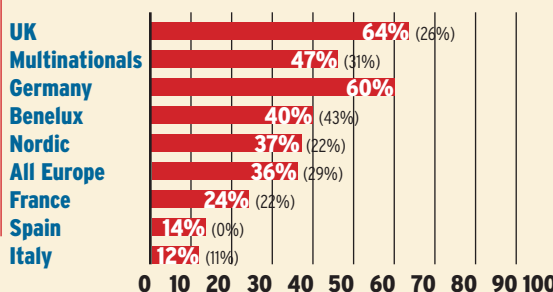
UK	+79%	(+58%)
Multinationals	+50%	(+22%)
Nordic	+27%	(+28%)
Germany	+27%	(+20%)
Benelux	+20%	(+50%)
All Europe	+19%	(+17%)
Spain	-13%	(-12%)
Italy	-22%	(-45%)
France	-33%	(0)

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

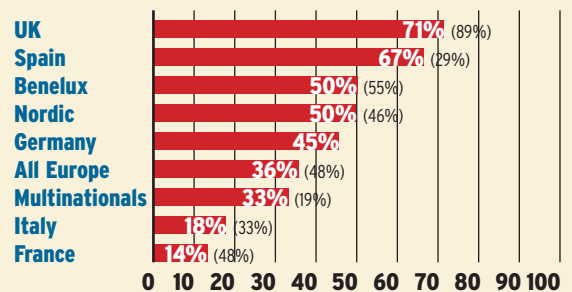
**PERCENTAGE REPORTING Q1 2014 GROWTH VS Q1 2013**  
(previous quarter results in brackets)



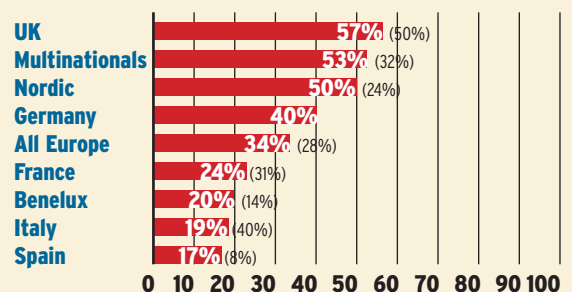
**PERCENTAGE WHO WILL EMPLOY MORE STAFF IN Q2 2014**  
(previous quarter results in brackets)



**PERCENTAGE WITH INCREASING TIME UTILISATION IN Q1 2014**  
(previous quarter results in brackets)



**PERCENTAGE EXPECT TO INCREASE INVESTMENT BY >10% IN 2014**  
(previous quarter results in brackets)



Asked end of Q1 2014

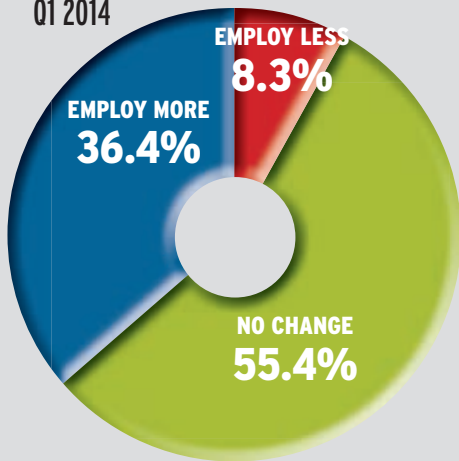
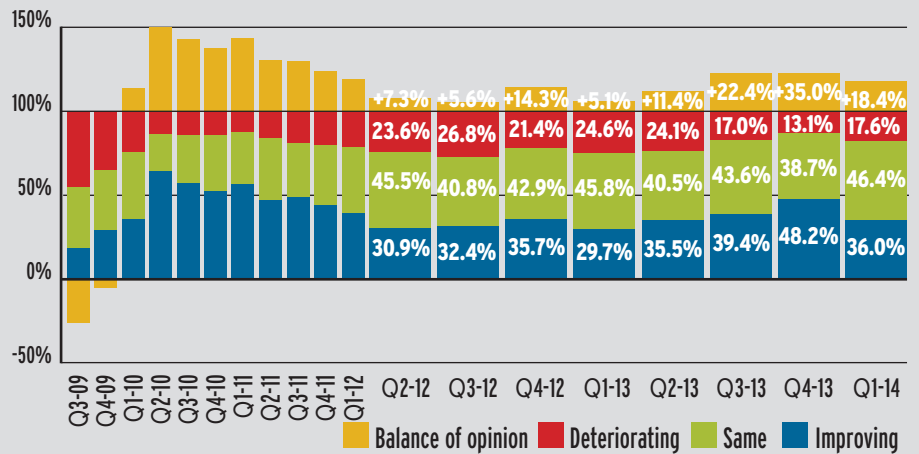


FIGURE 6

### Time utilisation trend



expecting to increase investment by at least 10%. Companies in the UK, Nordic region, multinationals and in Germany were the most likely to increase spending. The UK leads the way in this measure, with almost 60% of companies intending to significantly increase investment this year.

These investment intentions improve further in 2015, with 46% of companies planning to make +10% increases in CapEx next year. Nordic companies seem most bullish on this measure, but UK and multinational companies, along with German companies, also have higher than average spending plans.

### UK on the up

Country wise, the trends from previous surveys are broadly confirmed. The UK remains the most positive rental market in the region, with multinational companies also feeling positive. Coming next in the list are Nordic companies, which reported similar or improved results in all measurement categories compared to the previous quarter.

German companies - on a small sample - also come near the top in most measures, notably on quarterly business growth and employment intentions. Benelux companies, meanwhile, remain firmly in the middle of the league table, with a declining positive balance of opinion on current conditions and a smaller proportion reporting quarterly year-on-year growth - 40% compared to 57% at the end of 2013.

In terms of the outlook 12 months ahead, the most optimistic companies are in the UK - with more than a third forecasting 'much better' conditions, followed by multinationals (20%), Nordic companies (18%) and Spain (14%).

Of course, 'much better' is saying quite a lot. Add in those prepared to say that conditions will only be 'better' and the proportions rise dramatically - 56% of all companies in Europe, 100% of the UK respondents, and 60% or more in the case of Nordic, Benelux and multinational companies.

And again, Spain shows a clear positive trend, with 71% of companies expecting business in a year's time to be better or much better. We need hardly point out that, as always, context is all. **IRN**



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## Show details

### WHAT:

International Rental Exhibition (IRE)

### WHEN:

24 - 26 June, 2014

Tuesday 9.30 - 18.00

Wednesday 9.30 - 18.00

Thursday 9.30 - 17.00

### WHERE:

Hall 2, Amsterdam RAI, Amsterdam

### ADDRESS:

Europaplein, NL 1078 GZ, Amsterdam, The Netherlands

### ORGANISERS

IRE is organised by Industrial Promotions International (IPI) in association with IRN and KHL Group.

### TRAVEL TO RAI:

**By Plane:** The RAI exhibition centre has a dedicated train station and is 15 minutes from Schiphol Airport on a direct line. This line is different from the trains to Amsterdam Central station. The single fare to RAI is less than €4. Schiphol train station is accessed directly from the arrivals area of the airport.

**Taxi:** The taxi rank is located at the airport's exit. Dependent on the traffic, a taxi can take you to Amsterdam city centre in half an hour and will cost around €40.

[www.IREshow.com](http://www.IREshow.com)

IRE takes place at the Amsterdam RAI venue on 24-26 June.



# Stop press

**T**here has been a very strong response from exhibitors ahead of this month's International Rental Exhibition (IRE) in Amsterdam, the Netherlands, with the show now expanded to accommodate demand for space.

A total of 89 exhibitors are registered to take part in IRE, which takes place at the Amsterdam RAI venue on 24-26 June, 2014, and now takes up 2428 m<sup>2</sup> of stand space. It is the third time that the exhibition has taken place, and it looks set to be the biggest ever show.

At the end of April, space for as many as 20 additional exhibitors was added to the exhibition, triggered by the large size of the waiting list.

New exhibitors include Toro Loco/Guidetti, Ormet, HSO, Smartlift, FSI power-tech, Hanenberg Materieel, Green Tek, Morris Site Machinery, Nightsearcher, Graco, Life's Cool Climate Control, Red Rhino and Metalgalante.

In addition, Satema, Dynamics Software, Fast Verdini, Delfin, V.Emme, HH-Intellitech and GMV also

Smartlift's SL 380 Outdoor High Lifter will be on show - featuring a multifunctional hydraulic rotary head with suction pads, vacuum circuits and two pumps.

signed up to exhibit on the extra space, with more enquiries still being accommodated as IRN went to press.

Other already confirmed exhibitors are important suppliers to the rental market including Volvo CE, Kubota, Hitachi, Wacker Neuson, Yanmar, JCB and Hilti. See the April-May issue of IRN for further details of what they plan to exhibit at the show.

Like the companies that signed up early to the event, the newest IRE exhibitors plan to display genuinely cutting-edge, new technology alongside the product 'mainstays' of rental fleets.

### Site equipment

Products on display will include two specialist remote-controlled telescopic handlers from Smartlift in the form of the SL 780 Giant and SL 380 Outdoor High Lifter.

The SL 780 can reach the highest of the two, with a centre of yoke figure of 4.2 m, and can handle up to 1.3 tonnes. The machine features a multifunctional hydraulic rotary head fitted with suction pads, vacuum circuits and two pumps to allow it to vacuum lift building materials such as glass panels. Designed for rough terrain, the SL 780 boasts front-





Ditch Witch will also exhibit at IRE, and plans to showcase a range of equipment well-suited to the rental industry, including its Zahn R300 tool carrier.

wheel drive. It is a compact machine, weighing a total of 1.3 tonnes with a width of 1.01 m and a length of 2.8 m.

The smaller SL 380 also features a multifunctional hydraulic rotary head with suction pads, vacuum circuits and two pumps. Its centre of yoke lifting height is 2.8 m, and the machine can carry up to 380 kg. It weighs 700 kg and is 820 mm wide and 1.8 m long.

Both machines feature a side-shift adjustment that allows them to be shifted during installation jobs to allow extra precision.

Graco, meanwhile, plans to showcase a wide range of tools from pressure washers to sprayers. Its St Max II 495 Hi-Boy range of sprayers for painting contractors will be on display, for instance, together



with its UltraMax 795 electric airless sprayers, capable of handling a wide variety of coatings.

The Mark V IronMan sprayer will also be on show - a durable airless sprayer designed for fire retardants, airless plasters and paints - together with Graco's G-Force pressure washers, EasyMax WP II cordless, airless sprayers and EasyMax FF paint sprayers. Jet rollers, hose reels and High-volume, low-pressure sprayers will also be on show.

For its part, Hanenberg Materieel said it would have its all-electric Sherpa 100 Eco mini loader on display. This is a new machine in the manufacturer's eight-model mini loader range and stands out in that it is the company's first 100% electric model.

Described as well-suited to internal applications, the 760 mm wide machine is powered by a 1.5 kW front-mounted electric motor. As well as being environmentally friendly, the Sherpa 100 Eco also emits lower noise than a traditionally-powered alternative.

Ditch Witch will also exhibit at IRE, and plans to showcase a range of equipment well-suited to the rental industry, including its Zahn R300 tool carrier - a machine that it said was now featured in Loxam's rental fleet.

Other machines on show will include examples from Ditch Witch's line of compact walk-behind

HH-Intellitech will also have multifunctional lifters on display - it plans to unveil its new generation two of Multilifters for the first time. Pictured is the GlasLift 250D from the previous range.

## APEX exhibition



The IRE show is being held at the RAI in a hall alongside the APEX aerial platform exhibition. Visitors registered for one of the shows will have free access to the other.

More than 100 international exhibitors will attend, demonstrating their products and services in a live environment. Terex AWP's Genie, for instance, will launch two articulating booms at APEX 2014: the Z-62/40 (pictured), an update of the Z-60/34, plus a new addition to the same range.

Many other launches are also planned from the biggest names in the industry including JLG, Terex AWP, Snorkel, Skyjack, Manitou and Ruthman and many others. Go to [www.apexshow.com](http://www.apexshow.com) for more details, and see the June issue of IRN's sister publication, *Access International*, for a stop-press preview.



## Exhibitors



Correct as on 20 May, 2014.

See [www.IREshow.com](http://www.IREshow.com) for latest list, or use a smart phone to scan the QR code below, and go straight to the webpage.

<b>ACCESSA</b>	604
<b>American Rental Association</b>	138
<b>Annata</b>	610
<b>Armada Dynamics AS</b>	265
<b>BBA Pumps</b>	425
<b>Brendon Powerwashers</b>	440
<b>Cangini Benne S.R.L.</b>	215
<b>CLMiller Consulting</b>	545
<b>CONTAINEX Container-Handelsgesellschaft m.b.H.</b>	300
<b>CNSE</b>	525
<b>Dagico Software</b>	110
<b>Dantherm</b>	108
<b>Dehaco B.V.</b>	560
<b>Delfin</b>	390
<b>DIECI S.r.l.</b>	510 & 614
<b>DIS Sensors</b>	634
<b>Ditch Witch</b>	624
<b>El Björn</b>	114
<b>Eliet Europe</b>	555
<b>EuroGate International</b>	230
<b>Fast Verdini</b>	570
<b>Firefly Solar Generators Ltd.</b>	535
<b>FSI power-tech</b>	685
<b>GlobalRep</b>	540
<b>GMV Handling</b>	290
<b>Graco</b>	580
<b>GreenMech Ltd.</b>	100
<b>Ground-Guards</b>	675
<b>Hanenberg Materieel</b>	680
<b>HH-Intellitech</b>	470
<b>Hiiti AG/FL</b>	140
<b>Himoinsa</b>	420
<b>Hitachi</b>	310
<b>HSO / Dynamics Software</b>	480
<b>HTC</b>	618
<b>Husqvarna</b>	128
<b>iFacto</b>	265
<b>InspHire International B.V.</b>	565
<b>Intermat</b>	124
<b>Irium Software</b>	160
<b>JCB</b>	400
<b>Hifi Filter/Jura Filtration</b>	120
<b>KAESER Kompressoren SE</b>	430
<b>KHL Group</b>	104
<b>Klindex</b>	620
<b>Kubota Europe SAS</b>	315
<b>Kunzle &amp; Tasin</b>	118
<b>Life's Cool Europe Climate Control</b>	490
<b>MAC3</b>	158
<b>MCS Global Ltd.</b>	260
<b>Metalgalante</b>	175
<b>Morris Site Machinery</b>	670
<b>Nightsearcher</b>	590
<b>Off Grid Energy Ltd.</b>	445
<b>Ormet</b>	575
<b>Paclite Equipment</b>	608
<b>Postpullers (UK) Ltd.</b>	460
<b>Pullman Ermator</b>	644
<b>Red Rhino</b>	270
<b>Ritelite Systems Ltd.</b>	360

Continued on page 24 →

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**ire** 2014  
Amsterdam  
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(Exhibitors continued)

Satema A/S	170
Schwaborn Gerätebau GmbH	530
Sibilia	655
SIMEX S.R.L.	215
Smartlift	180
SPE International	630
Spring Machine Control	295
Stanley Hydraulic Tools	650
Swepac	225
Terex Compact Germany	250
Thermobile Industries	550
Thwaites Dumpers Co Ltd.	330
Toro Loco/Guidetti	380
Tower Light S.r.L.	410
Trackunit A/S	150
Trelawny SPT	130
TROTEC GmbH & CO. KG	200
U. Emme	690
Varisco	450
Vermeer EMEA	640
VF Venieri SpA	455
Volvo CE	210
Wacker Neuson	500
Western Global c/o Onimpack Ltd.	600
XTRUX s.r.l.	320
Yanmar C.E. Europe S.A.S.	350

trenchers, which feature hydrostatic ground drives with simple-to-use, hydraulic, skid-steer-style steering.

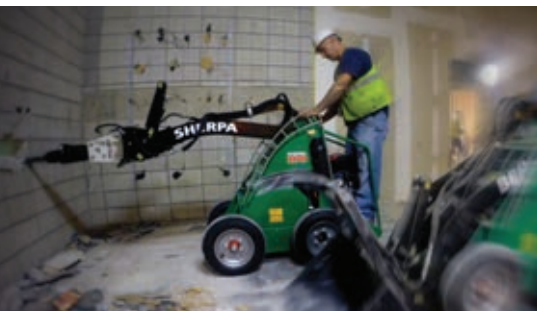
In addition, its Hammerhead Moles will be on show - replaceable piercing tools available in 50 mm to 200 mm models for regular and soft soils.

The manufacturer's UtiliGuard locating system will also be displayed - technology to help contractors locate underground utilities.

Mac3, meanwhile, a relative newcomer to the industry, plans to present its slim-design paving breakers with antivibration technology at IRE, designed to make demolition work healthier and easier. It said very low air consumption allowed two large breakers to be powered from only one small compressor, reducing energy costs as well.

IRE visitors could also view Mac3's mobile compressors, which the company claims can be switched from trailer-mounted to skid compressor in minutes and with no special tools.

And exhibitor U.Emme plans to showcase examples from its Lince series of angle brooms as well as tilt/dozer blades and concrete mixing buckets. For instance, it said its new Pantera angle brooms stood out because their diameter had been increased by 20mm compared to earlier models to allow them to clean more effectively and last longer.



Hanenberg Materieel said it would have its all-electric Sherpa 100 Eco mini loader on display.





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The sweeper can be attached to skid-steer loaders, loaders, backhoe loaders and telehandlers or, replacing the frontal plate with a frame provided as optional accessory, it can also be attached to the three-point on an agricultural tractor. Finally, by removing one of the available coupling systems and fixing a bolted plate directly onto the sweeper's body, the Pantera can be combined with excavators or backhoe loader, making it well-suited to cleaning sloping or vertical surfaces.

For its part, Fast Verdini's stand will include its vibrating needles - single devices that it claims can be used for seven different applications, carrying bush cutter tools, pruning chain saws and hedge cutters.

Available in 25 mm, 36 mm, 42 mm and 55 mm variants, the needles feature a flexible, 1m long shaft that can be extended to 2 or 3 m. A 500 mm cable extension can also be supplied to further increase the working area of the tools.

Meanwhile, many manufacturers will showcase products from the power and lighting sector that



are aimed at international rental markets. Satema, for example, will showcase examples from its ranges of gensets, switchboards, conduit systems, aluminum cabinets, temporary cabinets and transformer stations. It said the products on display would be those commonly used by rental companies.

Its modular building power distribution unit, for instance, is a machine available in either 250 A (250 Modulex) or up to 800 A (200 Modulex). It features

Fast Verdini will showcase its vibrating needles - single devices that it claims can be used for seven different applications, carrying bush cutter tools, pruning chain saws and hedge cutters.



## IRE visitors profile

- General construction rental companies
- Tool hirers
- Power/temp control rental
- Homeowner/DIY rental
- Landscaping/Ground Maintenance rental
- Industrial & Cleaning Equipment rental
- Aerial platform rental
- Equipment dealers/distributors

### ENTRANCE FEE:

Entry to the show is free for all pre-registered visitors. Entrance fee for non pre-registered visitors or visitors without a valid ticket is €20. This is a multiple entry badge that covers all three days.

Exhibitor U.Emme plans to showcase examples from its Lince series of angle brooms as well as tiltadozer blades and concrete mixing buckets.

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modular cabinets with three power rails, and can be used for both 230 V and 400 V power.

Himoinsa, meanwhile, said it planned to introduce its new lighting towers at the show as well as its rental range of generator sets, featuring EU Stage IIIA-compliant engines.

The manufacturer has expanded its Apolo range of lighting towers to include new products such as the compact eco, compact heavy duty, box, mini kit and new LED lamp versions. Products on show at IRE will include the new Apolo Box lighting tower, characterised mainly for its size and square shape - dimensions that are said to make it easier for customers to transport.

Indeed, Himoinsa said up to 20 units could be stacked and transported in a 40 ft (12.2 m)

Satema will showcase examples from its ranges of gensets, switchboards, conduit systems, aluminum cabinets, temporary cabinets and transformer stations. Pictured is its modular building power distribution unit.

container. The Apolo Box tower has an autonomy of more than 100 hours and is offered to the market with four 1000 W bulbs, but can also be supplied with six 240 W LED bulbs. Its hydraulic telescopic mast can reach a height of 9 m.

And the company's Compact Heavy Duty lighting tower boasts a reinforced chassis and trailer coupler. It consists of a tower kit that can reach 9m tall and generator set, both incorporated into a compact and balanced mobile unit. Its six 240 W LED light bulbs are said to extend the service life of its spotlights up to 50000 hours, as opposed to regular spotlights that usually offer up to 2000 hours.

Himoinsa's rental sector generator range boasts power outputs from 30 to 665 kVA. At IRE, the company said it would present the 30 kVA HRYW 30, 85 kVA-HRFW 85 and 150 kVA-HRFW models.

More lighting towers will be showcased at IRE by →

## Fun-run to support children's charity

Exhibitors and delegates to the IRE and APEX exhibitions will have the chance to raise funds for a deserving Netherlands-based charity by taking part in a 5 km fun-run to be held at the RAI convention centre on 26 June.

The run, which will start at the RAI exhibition centre at 7.00am, is in support of the children's charity CliniClowns, which provides entertainment for children undergoing treatment in hospitals throughout the Netherlands as well as hospitals in Europe, Australia and the US.

The charity's aim is to offer a welcome diversion for children in hospital; "Not only because these kids deserve it, but also because they benefit greatly from it. Distraction and fun both work to relax the children and reduce their stress levels."

Runners are encouraged to obtain sponsorship for the run, either personally or through their employers. The IRE and APEX exhibitions are covering the costs of organisation, so every Euro raised by runners will go to the charity.

A similar run during the 2011 APEX show raised €3690 for the Ronald McDonald Huis in Maastricht, a charity that provides accommodation for families visiting their children in hospital.

The start and the finish of the run are close to the Amsterdam RAI exhibition centre, and most of the trail is off-road in the Beatrix Park. A cyclist will accompany the runners.

The show organiser, IPI, would like to have an idea of the number of runners who will take part, so if you are planning to run please send an e-mail to Han Heilig at: [han@practica.nl](mailto:han@practica.nl)



Himoinsa will showcase its new Apolo Box lighting tower - it said up to 20 units could be stacked and transported in a 40ft (12.2m) container.

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# Rental Market

manufacturers including Morris Site Machinery, which said a key product on its stand would be the new SMC TL-90 LED mobile lighting tower. This model is powered by five LED lamps and the tower is said to offer 360° light coverage and a running time of 133 hours.

The SMC TL-90 LED mobile lighting tower also features a fuel efficient solution by allowing three



Dynamics Software will showcase its Rental Management Solution for Microsoft Dynamics AX - software that is said to give companies in the rental sector a clear view of all current operational information in real-time.

machines to be linked together operating from one engine, giving up to 400 hours running time.

**Rental IT**

Software company HSO, meanwhile, will be demonstrating its HSO Rental package to IRE visitors. Designed to help rental companies respond quickly and flexibly to customer needs, the software is said to provide a clear view of all current operational information in real-time.

Based on Microsoft Dynamics AX, HSO Rental offers scheduling, cross hire, warehouse management, transport, project management and tracking & tracing functionality in a single integrated business environment. The idea is to give a quick and accurate picture of the availability of resources, manpower and transport and provide companies with up-to-date information.

Dynamics Software is another software company that will exhibit in the extended IRE floor space. It said Rental companies were increasingly investing in information technology to streamline and control their processes and deliver a better, faster service to customers.

It will showcase its Rental Management Solution for Microsoft Dynamics AX - software that is said to give companies in the rental sector a clear view of all current operational information in real-time. The package supports rental activities from administration, registration and management, to potential sales activities, orders and contracts.

It said all information about clients, equipment, services, staff, contracts, partners, etc was recorded and maintained in a single central database.

**Expanded show**

Tony Kenter, managing director of show organiser Industrial Promotions International (IPI), said he was delighted with the increase in size of the show.

"A bigger, stronger show is good news for everyone. It expands the range of equipment on display for visitors and helps generate increased traffic for all the exhibitors."

The IRE show, which is supported by the European Rental Association and *International Rental News (IRN)*, is being held at the RAI venue in Amsterdam in a hall alongside the APEX aerial platform exhibition. Visitors registered for one of the shows will have free access to the other.

Visitors can also dip into the sessions of the European Rental Association's annual convention (at a cost, see booking page at [www.erarental.org](http://www.erarental.org)) and network at the European Rental Awards dinner, on the Wednesday night.

Turn to page 33 in this issue for more details. **IRN**



Morris Site Machinery said a key product on its stand would be the new SMC TL-90 LED mobile lighting tower.



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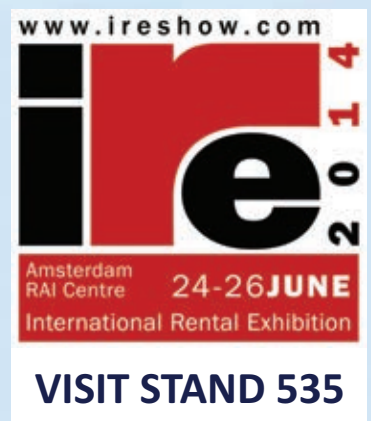


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# RENTAL COMPACT

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| 33kVA | 44kVA | 66kVA | 90kVA | 110kVA | 135kVA | 165kVA | 220kVA | 275kVA | 330kVA | 450kVA | 550kVA |        |

Throughout Europe, SDMO is operating as a responsible company by offering 13 mobile generating sets meeting the demands of the rental market and complying fully with directive 97/68/CE which since the 1<sup>st</sup> January 2011 has required engines to be STAGE 3A-certified. Statutory Instruments 2006 N° 29. Equipped with stage 3A engines, the entire Rental Compact range - from 22 to 550 kVA has been helping reduce pollutant emissions for a cleaner, more pleasant future.



*Energy Solutions Provider*



# CEO session planned for ERA Convention



Senior figures from the global rental industry are scheduled to take part in a panel discussion at the start of this year's European Rental Association Convention.



## European Rental Association Convention Preliminary Programme

**TUESDAY - 24th June, 2014**

**9:30-12:00**

■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**12:00-15:00**

■ Visit: Rental Depot (optional, open to participants to the ERA Convention)  
■ Visit of a new Boels depot in Amsterdam

**15:00-16:00**

**BREAK** - Networking

■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**16:00-18:00**

**CEO AND LEADERSHIP PANEL "The Challenges and Opportunities facing the Equipment Rental Market"**



**PANELISTS:**

*Michael Kneeland,*  
CEO, UNITED RENTALS



*Gerard Deprez,*  
CEO, LOXAM



*Vesa Koivula,*  
CEO, CRAMO



*Derrick Golden,*  
COO, VOLKER STEVIN MATERIEEL BV



*Gareth Lewis,*  
Region Head  
Northern Europe,  
HILTI

■ Other panelists TBC  
Moderator: *Nadine Dereza*

**18:00-19:00**

**ERA INAUGURATION COCKTAIL**

Open to participants to the ERA Convention and Exhibitors at IRE Show

The programme for June's three-day European Rental Association (ERA) Convention in Amsterdam, the Netherlands, has revealed an event packed with high-profile speakers and presentations.

Taking place from 24 to 26 June at the Amsterdam RAI Exhibition Centre, the first day of the ERA Convention will feature a CEO and leadership panel discussing the challenges and opportunities facing the equipment rental market.

Senior figures from the global rental industry are scheduled to take part in the panel, including United Rentals CEO Michael Kneeland, Loxam CEO Gérard Déprez, Cramo CEO Vesa Koivula, Volker Stevin Materieel COO Derrick Golden, and Hilti regional head for Northern Europe Gareth Lewis.

Meanwhile, the main theme of the ERA Convention is 'Internet as a Game Changer'. Guest speaker Richard Robinson, director at internet giant Google, will address delegates on the third day of the event - a high-profile speech that looks set to be another highlight.

The ERA Convention will also include a roundtable discussion on the morning of 25 June about what the industry can learn from Japan. Xiaoming Cheng, board member from the Japan Construction Equipment Rental Association, will take part.

A second roundtable is also scheduled for that morning on the theme of yield management, with speakers including United Rentals CFO Bill Plummer, Eric Hills from price optimisation software company Zilliant, and Ann-Charlotte Ågren, Financial manager at Cramo Sweden.



**THURSDAY - 26th June, 2014**

**09:00-10:00  
ROUNDTABLE 1: PARTS MANAGEMENT**

Speakers:  
*Martin Holmgren*, CRAMO  
*Alex Schuessler*, SMARTEQUIP  
 Moderator: *Guy Cremer* - BOELS

**ROUNDTABLE 2: INTERNET AS A GAME CHANGER**

*Eugen Russ* (right), ERENTO  
*Christian Seifert*, AVENIT AG.  
 Moderator: *Nadine Dereza*



**10:00-11:00  
BREAK** - Networking  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**11:00-12:00  
ERA GENERAL ASSEMBLY**

**12:00-12:20  
BREAK** - Networking  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**12:20-13:30  
GUEST SPEAKER**  
*Richard Robinson*,  
 Director, Google



**13:30-15:30  
ERA LUNCHEON**  
**15:30-17:00**  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

A parts management round table will be held on the morning of 26<sup>th</sup> June, featuring Cramo's Martin Holmgren and SmartEquip's Alex Schuessler.

After that, the Internet as a Game Changer roundtable is scheduled - a key discussion ahead of the event's keynote address in the afternoon

Delegates will have chance for networking breaks throughout the Convention, and time has also been set aside to visit the equipment exhibitions.

The ERA Convention takes place at the same time as the sell-out International Rental Exhibition (IRE) and APEX international access platform exhibitions - all three are being held at the Amsterdam RAI Exhibition Centre.

Turn on page 21 to read a 'stop press' preview of the IRE show, which has been expanded to accommodate high demand from exhibitors.

Meanwhile, the European Rental Awards dinner takes place on the Wednesday night (25 June) - see page 36. **IRN**

■ For more details, and to register for the ERA convention, go to: [www.erarental.org/upcoming-events/upcoming/ERA-Convention-2014-and-International-Rental-Exhibition-15.html](http://www.erarental.org/upcoming-events/upcoming/ERA-Convention-2014-and-International-Rental-Exhibition-15.html)



Alternatively, use a smart phone to scan the QR code on the left and go straight to the webpage.

**WEDNESDAY - 25th June, 2014 (Morning)**

**09:00-10:00  
ROUNDTABLE 1: WHAT CAN WE LEARN FROM JAPAN**

Speaker:  
*Xiaoming Cheng* - Board Member, JCRA (Japanese Construction Equipment Rental Association)  
 Moderator: *Murray Pollok*, KHL

**ROUNDTABLE 2: YIELD MANAGEMENT**

Speakers:  
*Bill Plummer*, CFO, UNITED RENTALS  
 - *Eric Hills*, SVP ZILLIANT  
 - *Ann-Charlotte Ågren*, Financial Manager Cramo Sweden  
 Moderator: *Charles Miller*, CL, MILLER CONSULTING

**10:00-11:00  
BREAK** - Networking  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**11:00-12:00  
PROMOTION COMMITTEE REPORT**  
 Chairwoman: *Fiona Perrin*, HSS



**EQUIPMENT TECHNOLOGY REPORT**  
 Chairman: *Martin Holmgren*,  
 CRAMO

**12:00-14:00  
BREAK** - Networking  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**



**WEDNESDAY - 25th June, 2014 (Afternoon)**

**14:00-15:30  
PLENARY SESSION**  
 ■ **Welcome Address**  
*Vesa Koivula*, ERA President



■ **Rental versus Ownership**  
*Judith Merkies*, MEP, Author of "The Lease Society - the end of ownership"

■ **The Future of the Web, an era of disruption**  
*Cor Molenaar*, eMarketing and Distance Selling  
 Moderator: *Nadine Dereza*



**15:30-16:30  
BREAK** - Networking  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**16:30-17:30  
PLENARY SESSION**  
 ■ **Trends in the US Rental Industry**  
*Chris Wehrman*, CEO of ARA

■ **Trends in the European Rental Industry**  
*Graham Arundell*, MD of HAE and Chairman Statistics Committee  
 Moderator: *Nadine Dereza*

**17:30-18:00  
BREAK** - Networking  
 ■ Visit: **INTERNATIONAL RENTAL EXHIBITION**

**18:00-20:00  
EUROPEAN RENTAL AWARDS**  
 ■ **Cocktail Reception**



**20:00-23:00  
EUROPEAN RENTAL AWARDS**  
 ■ **Dinner**

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The shortlist has been announced, and this year's European Rental Awards look set to an exciting event.

## Event details

### EUROPEAN RENTAL AWARDS

Wednesday 25th June, 2014

Elicium Centre, Amsterdam RAI  
www.khl.com/rentalawards

#### ERA CONVENTION:

Tuesday 24 - Thursday 26 June, 2014  
Elicium Centre, Amsterdam RAI  
www.erarental.org

#### BOOKING:

To book your place at the awards dinner visit [www.erarental.org](http://www.erarental.org).

#### ORGANISERS:

The European Rental Awards are jointly organised by the European Rental Association and *International Rental News*.

The judging panel in Brussels on 18 February. Top row from left: Michel Petitjean (Secretary General of ERA), Claudio Fiorentini (Managing Director - Special Projects, JCB Sales) and Murray Pollok (IRN Editor). Bottom row from left: Pedro Luis Fernandez (CEO, GAM Alquiler, Spain), Sat Dhaiwal (CEO, A-Plant, UK) and Vesa Koivula (ERA president & CEO, Cramo, Finland). Mr Petitjean was the non-voting chairman on the panel.



The judging panel for the European Rental Awards met in Brussels on 18 February to decide the shortlists, with the winners to be announced at the awards dinner in Amsterdam on 25 June, during the European Rental Association's annual convention and the International Rental Exhibition (IRE).

The shortlists for each category, in alphabetical order, are:

#### LARGE RENTAL COMPANY OF THE YEAR (REVENUES >€15 MILLION)

- AFI (UK)
- GAP Group (UK)
- Loxam (France)

#### SMALL/MID-SIZED RENTAL COMPANY OF THE YEAR (REVENUE <€15 MILLION)

- Crestchic (UK)
- Dromad Hire (Republic of Ireland)
- GGR Group (UK)
- Hotmobil (Germany)
- Industrial Access (Romania)

#### RENTAL PRODUCT OF THE YEAR

- Firefly (Cygnus hybrid generator)
- Niftylift (HR28 hybrid access platform)
- Power Towers (Pecolift access platform)
- SDMO (Rental Compact generators)
- Towerlight (VTLED lighting tower)

#### RENTAL SAFETY CAMPAIGN OF THE YEAR

- AFI (UK)
- Lavendon Group (Europe)
- Ramirent (Finland)

#### RENTAL MARKETING CAMPAIGN OF THE YEAR

- 4-punto-1 (Italy)
- Hewden (UK)
- Nationwide Platforms (UK)

#### RENTAL PERSON OF THE YEAR

- To be announced at the awards dinner.

#### ERA/IRN LIFETIME ACHIEVEMENT AWARD

- To be announced at the awards dinner.

The judges said the more than 50 entries for the awards "demonstrated the passion and enthusiasm that is in the rental industry, with companies proud

of their achievements and willing to share their experiences.

"Even in a generally difficult year for rental in Europe, as 2013 was, many companies were able to grow and innovate. It was encouraging, for example, to see small companies making their own space in the market, often with niche products or in new sectors - a sign that there are great opportunities still to be found in rental," they said.

To book your place at the awards dinner visit [www.erarental.org](http://www.erarental.org).

Ritchie Bros is the Gold Sponsor for the awards, and IronPlanet is the sponsor of the awards drinks reception. Silver sponsors are Caterpillar, Grindex and Hilti.

■ For summaries of the submissions from each of the shortlisted companies, see the April/May issue.



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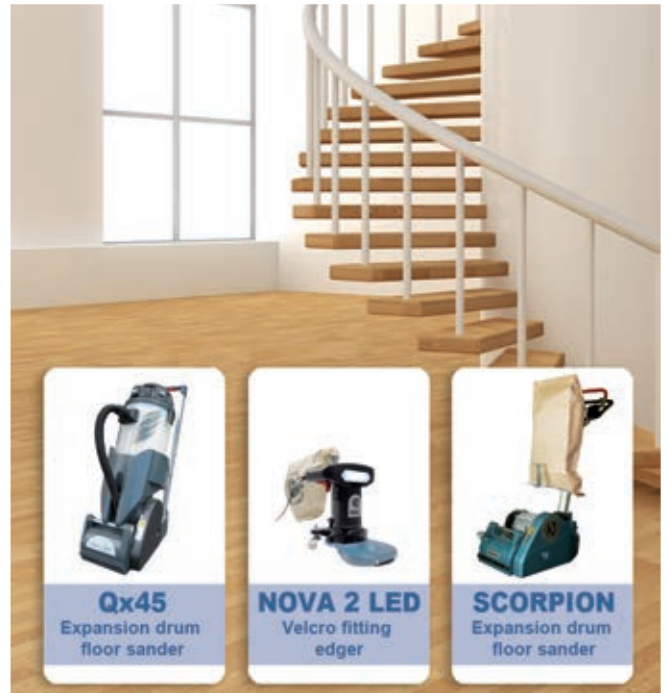
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## IRN100 Notes & thanks

IRN again thanks those companies and individuals who contributed information to the survey. If you have comments, or would like to be included next year, please contact the editor. Tel: +44 (0)1892 786209  
E-mail: helen.wright@khl.com

- Rankings are based on rental revenues for 2013 (or the most recent financial year) and include sales of used fleet and consumables/contractor supplies. Where known, sales of new equipment have been excluded from the survey.
- Figures denoted (Est) have been estimated by IRN. As in previous years, figures denoted (1) are taken, with thanks, from the annual RER-100 survey published by US-magazine RER (*Rental Equipment Register*) in May 2014.
- All revenues have been converted into € using exchange rates as at 31/12/13, as follows (exchange rates used in last year's survey are given in brackets):

€1.00 = US\$ 1.318 (1.32)  
 =UK£ 0.837 (0.81)  
 =AU\$ 1.548 (1.27)  
 =CA\$ 1.470 (1.31)  
 =JPY 144.9 (114.2)  
 =ZAR 14.28 (11.19)  
 =SEK 8.85 (8.58)  
 =S\$ 1.75 (1.61)  
 =NOK 8.38 (1.34)  
 =BRL 3.26 (2.41)  
 =CNY 8.36 (8.22)  
 =NZ\$ 1.68 (1.60)

# Shifting



United Rentals maintained its position at the top of the IRN100

**The themes of last year's IRN100 are repeated in this year's list, with North American rental companies motoring ahead while Europe and Australia remain becalmed. Helen Wright reports.**

Forecasters were cautious with their outlooks for rental growth last year, and with good reason - North America apart, 2012 did not live up to its promise, and the same uncertainties that held economies back two years ago remained relatively unchanged at the start of 2013.

But in the end, a picture has emerged of a relatively stable year, with the momentum behind the recovery in North America contrasting with a still-sluggish Europe and a faltering Australia. And this came amid modest growth from emerging countries, where fledgling rental markets are still gaining ground.

RANK	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
1	<b>United Rentals</b>	3331	2989	Greenwich, Connecticut, US	USA, Canada	Construction equipment, tools	876	12200	+001 (203) 622-3131 www.unitedrentals.com
2	<b>Aggreko</b>	1890	1954	Glasgow, UK	100 countries globally	Power, temperature control and compressor rental	202	6000	+44 141 225 5900 www.aggreko.com
3	<b>Ashtead Group</b>	1441	1395	London, UK	UK, US	Construction equipment, tools	494	9000	+44 020 7726 9700 www.ashtead-group.com
4	<b>Algeco Scotsman</b>	1302	870	Baltimore, Maryland, US	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia	Portable accommodation/storage units	260	5130	+1 410 931 6000 www.algecoscotsm.com
5	<b>Hertz Equipment Rental Corp</b>	1017	1051	Park Ridge, New Jersey, USA	US, Canada, France, Spain, China, Saudi Arabia	Construction equipment, tools	360	4315	+1 201 307 2000 www.hertzequip.com

TABLE 1

## IRN100 Revenues

	2013 (currency adjusted)	2013 Revenues (€ billion)	2013 Percentage change	2012 Revenues (€ billion)	2011 Revenues (€ billion)	2010 Revenues (€ billion)	2009 Revenues (€ billion)	2008 Revenues (€ billion)	2007 Revenues (€ billion)	2006 Revenues (€ billion)	2005 Revenues (€ billion)
Top 5	€ 9.30bn	€ 8.98bn	7.17%	€ 8.38bn	€ 6.96bn	€ 5.30bn	€ 5.04bn	€ 6.30bn	€ 7.20bn	€ 7.2bn	€ 5.6bn
Top 10	€ 13.50bn	€ 12.76bn	3.32%	€ 12.35bn	€ 11.44bn	€ 8.90bn	€ 8.07bn	€ 10.00bn	€ 10.80bn	€ 9.8bn	€ 8.0bn
Top 50	€ 27.24bn	€ 25.30bn	-0.51%	€ 25.43bn	€ 24.23bn	€ 20.20bn	€ 18.73bn	€ 22.00bn	€ 22.10bn	€ 20.0bn	€ 16.8bn
Top 100	€ 33.72bn	€ 31.45bn	0.16%	€ 31.40bn	€ 29.43bn	€ 24.90bn	€ 23.20bn	€ 27.10bn	€ 26.90bn	€ 24.7bn	€ 20.4bn
Total World Market		€ 70bn (Est)			€ 60.00bn	€ 55.00bn	€ 55.00bn	€ 60-65bn	€ 62bn	€ 50bn	€ 45bn

# currents

RANK 14 13	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
6 6	<b>Aktio Corp</b>	929	887	Tokyo, Japan	Japan, Thailand, Singapore, Malaysia, and Taiwan	Construction equipment, tool hire, party/events	566	4678	+81 3 6854 1413 www.aktio.co.jp/en/
7 8	<b>Loxam</b>	805	828	Paris, France	France, Ireland, UK, Denmark, Germany, Spain, Belgium, Switzerland, Luxembourg, Morocco.	Construction equipment, tools	611	4410	+33 1 58 440 400 www.loxam.com
8 5	<b>Coates Hire Ltd</b>	758	987	Sydney, Australia	Australia, UK, Indonesia	Construction equipment, tools	240	2612	+61 2 9701 3308 www.coateshire.com.au
9 13	<b>Cramo</b>	657	680	Vantaa/Helsinki, Finland	Northern, Central & Eastern Europe, Russia	Construction equipment, tools, modular	357	2463	+46 8 623 5477 www.cramo.com
10 10	<b>Ramirent</b>	634	714	Vantaa, Finland	Fin, Sw, No, Den, Ru, Est, Lat, Lith, Pol, Hun, Ukr, Cz, Slov	Construction equipment, tools	302	2561	+358 20 750 200 www.ramirent.com
11 9	<b>Nishio Rent All Co</b>	623	723	Osaka, Japan	Japan, Malaysia, Thailand, Singapore, S. Korea, Vietnam	Construction equipment	335	2593	+81 6 6251 7302 www.nishio-rent.co.jp
12 12	<b>Nikken Corp</b>	601	683	Tokyo, Japan	Japan, US, UAE, Thailand, Spain, Indonesia	Construction equipment	192	1985	+81 3 5512 7311 www.rental.co.jp/english
13 14	<b>Sarens</b>	592	560	Wolvertem, Belgium	58 countries worldwide	Cranes	90	4200	+32 52 319 319 www.sarens.com
14 11	<b>Kanamoto Co</b>	524	698	Sapporo, Japan	Japan, China, ASEAN, UAE, Algeria	Construction equipment	351	2231	+81 3 5408 5600 www.kanamoto.co.jp
15 16	<b>Kiloutou</b>	471	460	Marcq en Baroeul, France	France, Poland	Construction equipment, tools	433	3500	+33 359 56 55 39 www.kiloutou.fr
16 75	<b>BlueLine Rental</b> (formerly Volvo Rents)	450	110 <sup>EST</sup>	Beverly Hills, CA, US	North America	Construction equipment	132	2100	+1 828 650 2311 www.volvorents.com
17 18	<b>Speedy Hire</b>	406	421	Newton-le-Willows, UK	UK & Ireland, Middle East, North Africa	Construction equipment, tools	264	3776	+44 0845 601 5129 www.speedyservices.com
18 21	<b>Home Depot Rentals</b>	356 <sup>1</sup>	357	Atlanta, Georgia, US	USA, Canada, Mexico	Construction equipment, tools	-	1265	+1 770 433 8211 www.homedepot.com
19 =40	<b>Select Plant Hire</b>	350 <sup>EST</sup>	230 <sup>EST</sup>	Dartford, UK	UK	Construction equipment, tools, tower cranes	-	-	+44 (0)1322 296200 www.selectplanthire.com
20 20	<b>Taiyo Kenki Rental</b>	349	405	Shizuoka, Japan	Japan	Construction equipment	102	1635	+81 542 843 111 www.taiyokenki.co.jp
21 25	<b>H&amp;E Equipment Services</b>	348	298	Baton Rouge, Louisiana	USA	Construction equipment	69	1775	+1 801 908 4307 www.he-equipment.com
22 19	<b>AMECO</b>	308	408	Greenville, SC, USA	US, Canada, South & Central America, South Africa, Iraq, Afghanistan, Philippines, Australia	Construction equipment, tools	25	3500	+1 864 295 7800 www.ameco.com
23 33	<b>Liebherr-Mietpartner</b>	302	272	Ludwigshafen, Germany	Germany, France, Spain, Austria, UK, Switzerland	Construction equipment	129	248	+33 680 889 822 www.liebherr.com



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RANK 14 13	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
24	39 <b>Tat Hong</b>	301	294	Singapore	Singapore, Australia, China, Indonesia, Vietnam, Malaysia, Thailand	Cranes, tower cranes, construction equipment	22	-	+65 62690022 www.tathong.com
=25	=26 <b>Mediaco Leverage</b>	300	290	Marseille, France	France	Cranes, construction equipment	60	1500	+33 4 9103 8191 www.mediaco.fr
=25	=55 <b>Zahid Group</b>	300 <sup>EST</sup>	175 <sup>EST</sup>	Jeddah, Saudi Arabia	Saudi Arabia	Construction equipment, power	20	-	+966 2 6671156 www.zahidcat.com
27	15 <b>Hitachi Construction Machinery Japan</b>	295	480 <sup>EST</sup>	Saitama, Japan	Japan	Construction equipment	230	2500	+81 (0) 48 933 5509 www.hitachi-kenki.co.jp
28	30 <b>Zeppelin Rental</b>	290	288	Garching (Munich), Germany	Germany, Austria, Czech/Slovakian Republics, Russia	Construction equipment, tools, party/events, accommodation	140	1100	+49 (0)89 32 000 220 www.zeppelin-rental.com
=29	17 <b>Emeco Holdings</b>	284	443	Perth, Australia	Australia, Canada, Indonesia, Chile	Heavy construction and mining equipment	-	633	+61 8 9420 0222 www.emecogroup.com
=29	=26 <b>Lavendon Group plc</b>	284	290	Lutterworth, Leicestershire, UK	UK, Germany, France, Belgium, UAE, Oman, Bahrain, Qatar, Saudi Arabia, India	Aerial platforms	76	1647	+44 1455 558 874 www.lavendongroup.com
=29	=35 <b>Ahern Rentals</b>	284	268	Las Vegas, Nevada, USA	USA	Construction equipment	74	1650	+1 800 400 1610 www.ahern.com
32	34 <b>Boels Verhuur</b>	280	270	Sittard, Netherlands	Netherlands, Belgium, Germany, Lux, Czech, Slovakia, Austria, Poland, Italy	Construction equipment, tools, party/events	321	2400	+31 (0)46 459 2159 www.boels.com
33	=28 <b>Finning International</b>	277	289	Toronto, Canada	Canada, UK, Chile, Argentina, Bolivia, Uruguay	Construction equipment, power	-	-	+1 780 930 4800 www.finning.com
34	31 <b>HKL Baumaschinen</b>	272	280	Hamburg, Germany	Germany, Austria, Poland	Construction equipment	140	1200	+49 (0)800 44 55 44 www.hkl-baumaschinen.de
35	42 <b>HSS Hire</b>	270	229	Mitcham, UK	UK/Ireland	Construction equipment, tool hire	250+	2600+	+44 08457 282828 www.hss.com www.hsshiregroup.com
36	=28 <b>Mobile Mini Inc</b>	265	289	Tempe, AZ, USA	USA, Canada, UK, Netherlands	Portable storage & accommodation	136	1600	+1 480 894 6311 www.mobilemini.com
37	24 <b>Caterpillar Japan</b>	250 <sup>EST</sup>	310 <sup>EST</sup>	Tokyo, Japan	Japan	Construction equipment	248	2632	+81 (3) 5717 1121 www.japan.cat.com
38	37 <b>Toromont Industries</b>	237	250	Stoney Creek, Ontario, Canada	Canada	Construction equipment	38	-	+1 905 643 9410 www.battlefieldequipment.ca
39	=40 <b>Mammoet Holding BV</b>	230 <sup>EST</sup>	230 <sup>EST</sup>	Schiedam, Netherlands	Worldwide	Crane rental	-	-	+31 10 204 24 24 www.mammoet.com
=40	23 <b>Atlas Copco Specialty Rental Div.</b>	226	320 <sup>EST</sup>	Houston, USA	65 countries worldwide	Compressors and generators	-	-	+1 281 454 2200 www.atlascopco.com/rental

TABLE 2

## IRN100 Regional trends

CONTINENT	NUMBER OF COMPANIES						
	2013	2012	2011	2010	2009	2008	2007
Europe	40	44	44	50	54	55	56
N America	32	31	30	28	27	27	26
Japan	10	10	11	11	11	12	13
Australia	6	6	6	6	4	4	4
South America	3	3	4	3	2	0	0
Middle East	3	3	2	0	0	0	0
Asia (inc China)	2	2	2	1	1	1	0
Africa	0	1	1	1	1	1	1

These trends are reflected in this year's IRN100, which ranks the largest global rental companies by 2013 rental revenues. But before getting stuck into the details, there is one important factor to note that had a significant impact on the table - the issue of currency fluctuations.

The Japanese Yen (JPY) has been hit particularly hard, depreciating 27% between 12 December, 2012, and 12 December, 2013. The same applies, to lesser degree, to the Australian and Canadian Dollars.

Weakening the Yen is part of the Japanese government's efforts to help stimulate its economy, and while it may be good news for the country's exporters, it does skew the figures in the IRN100 ranking for Japanese companies. →

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RANK	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
<b>=40</b> 45	<b>Neff Rental</b>	<b>226</b>	209	Miami, FL, USA	USA	Construction equipment	64	1050	+1 305 513 3350 www.neffrental.com
<b>42</b> 53	<b>Solaris Equipamentos E Servicos</b>	<b>224</b>	178	São Paulo, Brazil	Brazil, Argentina	Construction rental	14	400	+55 11 2173 8685 www.solarisbrasil.com.br
<b>43</b> 47	<b>APR Energy</b>	<b>223</b>	201	Jacksonville, Florida	Global	Power, TC	-	1000	+1 904 223 2278 www.aprenergy.com
<b>44</b> 61	<b>Sunstate Equipment Co</b>	<b>222</b>	157 <sup>EST</sup>	Phoenix, AZ, USA	USA	Construction equipment	54	1156	+1 602 275 2398 www.sunstateequip.com
<b>45</b> =35	<b>Komatsu Rental</b>	<b>219</b>	268	Yokohama, Japan	Japan	Construction equipment	118	930	+81 45 274 3337 www.komatsu-rental.co.jp
<b>46</b> 32	<b>Boom Logistics</b>	<b>218</b>	275	Melbourne, Australia	Australia	Cranes and aerial platforms	40+	1000+	+61 3 9864 0200 www.boomlogistics.com.au
<b>47</b> 43	<b>Maxim Crane</b>	<b>210</b> <sup>EST</sup>	220 <sup>EST</sup>	Bridgeville, PA, USA	USA	Cranes and aerial platforms	31	-	+1 412 504 0200 www.maximcrane.com
<b>48</b> 44	<b>Mills Estruturas e Serviços de Engenharia</b>	<b>207</b>	218	Rio de Janeiro, Brazil	Brazil	Aerial platforms, telehandlers, formwork, shoring	51	2093	+55 21 21 233 700 www.mills.com.br
<b>49</b> 38	<b>NES Rentals</b>	<b>206</b> <sup>1</sup>	245 <sup>EST</sup>	Deerfield, IL, USA	USA	Construction equipment	77	-	+1 800 NES RENT www.nesrentals.com
<b>50</b> 48	<b>ADCO</b>	<b>200</b> <sup>EST</sup>	200	Ratingen, Germany	56 countries worldwide	Portable toilets	-	-	+49 2102 8520 www.adco.de

Indeed, of the 10 Japanese companies listed on the IRN100, all but one either remained in the same position as the 2012 or lost ground on the ranking year-on-year, despite in many cases growing their local currency revenues.

Take Aktio Corp, for instance - the highest-ranking Japanese rental company in the IRN100. Its revenues in Euros totalled €929 million, ranking it sixth in the list. However, if the Yen hadn't depreciated over the year, this would have translated to €1.18 billion, taking it to fifth place.

### Healthy growth

Adjusting for currency changes between 2012 and 2013 shows that, overall, IRN100 company revenues grew by 7.5%, which is a healthy growth rate given the wider economic backdrop. Much of this growth relates to North American businesses, where year-on-year corrected growth was 10.7%. Japanese companies also saw very respectable increases, with an average of 7.9%.

European IRN100 firms saw a much more modest average growth of 2%, while companies

in the rest of the world were almost flat at +0.4%. That flat result reflects the slow Australian economy, which has offset growth among the South American and Middle East companies in the list.

Revenues for the top five companies on the list were up 10.9% to €8.98 billion (on a 'corrected' currency basis). The big three global players maintained their 2012 positions, with United Rentals remaining the largest rental company in the world, followed by Aggreko and Ashstead Group.

However, there was change at places four and five, with Algeco Scotsman jumping up from seventh place in the 2012 IRN100 ranking to fourth place this year, knocking Coates Hire out of the top five and shunting Hertz Equipment Rental Co (HERC) down to fifth.

After completing a massive refinancing programme

at the end of 2012, Algeco Scotsman acquired Target Logistics in February 2013, a US provider of full-service remote workforce accommodation, for around US\$625 million. It then went on to expand in China, entering a joint venture with Beijing Chengdong International Modular Housing Company to manufacture, rent and sell modular space in China under the Algeco Chengdong name.

At the same time, Coates Hire was hit by a slowdown in Australia's natural resources sector, while HERC saw growth, but not enough to maintain its position in the ranking.

### European companies

There are 40 European companies featured in the 2013 IRN100, compared to 44 last year. This year's ERN50 ranking of the top 50 European companies by rental revenues totalled €10 billion, representing a slight fall against the figure of €10.24 billion recorded for 2012.

Indeed, the influence of Europe on the IRN100 is lessening year by year as other regions grow at a faster rate. However, entrants from developing markets remain elusive - large rental companies are still a rarity in Asia and South America, but growth is clearly trickling through.

Meanwhile, as far as capital expenditure is



Loxam's rental revenues slipped slightly year-on-year, but it improved its position in the ranking by one place to seventh

TABLE 3

## IRN100 Drop-outs


COMPANY	2013 REVENUES (€M)
Grupo Eurogruas	70
HUNE Rental	68.9
Skanska Maskin	62.7
De Boer Structures	55.1
MCC Plant Hire (Mutual Construction Co)*	38.1

\*Plant hire represented 13% of MCC Group activities in the year to 30 June 2013.

TABLE 4

## IRN100 New entrants

RANK	COMPANY	REVENUES
60	<b>National Pump</b>	Est 156
62	<b>Compact Power Equipment rental</b>	Est 145
63	<b>NCSG</b>	Est 144
=64	<b>TNT Crane &amp; Rigging</b>	Est 141
92	<b>Equipme+nt Depot</b>	Est 89



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RANK 14 13	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
51 46	<b>VP PLC</b>	199	202	Harrogate, UK	UK, Ireland, Germany, UAE, S America, Singapore, Australia, South America	Construction equipment, tools	110	1600	+44 (0)1423 533 445 www.vpplc.com
52 52	<b>Portakabin</b>	190 <sup>EST</sup>	180 <sup>EST</sup>	York, UK	UK, Ireland, Belgium, Netherlands, France	Accommodation rental, events	-	-	+44 01904 611655 www.portakabin.co.uk
53 49	<b>TVH Group</b>	185	195	Waregem, Belgium	BE, NL, LUX, D, PL, CZ, HU, RO, SK, SRB	Construction equipment, aerial platforms, forklift trucks	63	1037	+32 56 43 42 11 www.tvh.com
54 54	<b>Riwal</b>	176	175	Dordrecht, Netherlands	Europe, Middle East, Brazil, India, Kazakhstan	Aerial platforms, power, telehandlers	51	1185	+31 78 618 1888 www.riwal.com
55 50	<b>Classic Party Rentals</b>	170	195 <sup>EST</sup>	Los Angeles, CA, USA	USA	Party/events	39	2500	+1 310 966 4900 www.classicpartyrentals.com
56 =59	<b>Carrier Rental Systems</b>	170 <sup>EST</sup>	160 <sup>EST</sup>	Leatherhead, Surrey, UK	UK, USA, Germany, France, Holland, Poland, Singapore	Cooling equipment, pumps, generators, party/events	-	-	+44 (0)1372 220169 www.corp.carrier.com
57 =59	<b>All Erection &amp; Crane Rental Corp</b>	170 <sup>EST</sup>	160 <sup>EST</sup>	Cleveland, Ohio	USA, Canada	Crane rental	32		+1 800 232 4100 www.allcrane.com
58 51	<b>Xylem</b>	163	182	Bridgeport, US	Worldwide	Pump rentals	79	12500	www.xyleminc.com
59 57	<b>Kennards Hire</b>	158	173	Sydney, Australia	Australia, New Zealand	Construction equipment, tools	142	1000	+61 2 880 56100 www.kennards.com.au
60 NEW	<b>National Pump</b> <small>(Now owned by United Rentals)</small>	156	-	Greenwich, Connecticut	USA, Canada	Pumps and other equipment	35	-	+1 888 840 5886 www.npcrents.com

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RANK	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
61 58	<b>Kyosei-Rentemu</b>	155	160	Japan	Japan	Construction equipment, general rental	-	424	+81 155 33 1380 www.kyosei-rentemu.co.jp
62 NEW	<b>Compact Power Equipment Rental</b>	145 <sup>EST</sup>	-	Fort Mill, US	North America	Compact construction equipment	-	900	+1 803.324.8000 www.cpiequipment.com
63 NEW	<b>NCSG</b>	144	160	Alberta, Canada	Canada, US	Crane rental	18	271	+1-855-560-5050 www.ncsg.com
=64 72	<b>GAP Group Ltd</b>	141	118	Glasgow, UK	UK	Construction equipment, tools	94	1050	+44 141 225 4600 www.gap-group.co.uk
=64 NEW	<b>TNT Crane &amp; Rigging</b>	141 <sup>EST</sup>	-	Houston, USA	US	Cranes	23	1200	(001) 800.799.2505 www.tntcrane.com
66 =55	<b>Nordic Crane</b>	139	175 <sup>EST</sup>	Halden, Norway	No, Sw, Fi, Dk	Cranes	30	660	+47 69 21 70 70 www.nordiccranegroup.com
=67 =66	<b>ModSpace</b>	135 <sup>EST</sup>	135 <sup>EST</sup>	Berwyn, PA, USA	USA, Canada	Portable accommodation	80	750	+1 484 254 0100 www.modspace.com
=67 =66	<b>Streif Baulogistik GmbH</b>	135 <sup>EST</sup>	135 <sup>EST</sup>	Essen, Germany	Ger, Aus, Po, Rus, Ukr, Qatar	Construction equipment	-	-	+46 201 824 7700 www.streif-baulogistik.de
=69 69	<b>Lambertsson Sverige AB</b>	130 <sup>EST</sup>	125 <sup>EST</sup>	Förlöv, Sweden	Sweden	Construction equipment	-	-	+46 431 89300 www.lambertsson.com
=69 70	<b>Peinemann Holding B.V.</b>	130	120 <sup>EST</sup>	Hoogvliet, Netherlands	Netherlands, Belgium	Cranes, aerial platforms	14	585	+31 10 295 5000 www.peinemann.nl
=69 71	<b>Ainscough Crane Hire Ltd</b>	130	119	Wigan, UK	UK	Cranes	29	985	+44 (0)1257 478501 www.ainscough.co.uk
72 74	<b>SoEnergy International</b>	128 <sup>EST</sup>	116	Miami, Florida, USA	Latin America, Middle East, Africa	Power rentals	-	3000	+1 305 715 7308 www.soenergy.com



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RANK 14 13	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
73	68 <b>Rent Corp</b>	127	133	Japan	Japan, Thailand	Construction equipment	60	652	+81 54 238 7000 www.rent.co.jp
74	62 <b>Onsite Rental Group</b>	125 <sup>EST</sup>	150 <sup>EST</sup>	Sydney, Australia	Australia	Construction equipment	-	-	+61 2 8814 3200 www.onsite.com.au
75	73 <b>SK Rental Group</b>	122	117	Santiago, Chile	Chile, Peru, Brazil, Colombia	Construction equipment	25	600	+56 2 837 3500 www.skrental.cl
76	65 <b>General de Alquiler de Maquinaria (GAM)</b>	121	140	Madrid & Oviedo, Spain	Sp, Port, Morocco, Rom, Bulg, Pol, Mexico, Panama, Brazil, Peru, Chile, Colombia Middle East, Iraq,	Construction equipment	93	1100	+34 985 732 273 www.gamalquiler.com
77	64 <b>Hewden</b>	120	120	Manchester, UK	UK	Construction rentals	36	900	+44 (0)845 60 70 111 www.hewden.co.uk
78	79 <b>Shanghai Panguan Construction Equipment Rental Co., Ltd</b>	112	101	Shanghai, China	China	Construction equipment, tower/crawler cranes	30	4000	+86 21 321 800 88 www.panguan.com
79	78 <b>Ring Power</b>	110 <sup>EST</sup>	103 <sup>EST</sup>	St Augustine, FL, USA	USA	Construction equipment	14	-	+1 904 737 7730 www.ringpower.com
80	91 <b>Madisa</b>	109	84	Monterrey, Mexico	Mexico	Construction equipment	50	3000	+52 01 800 92 623 472 www.madisa.com
81	63 <b>Holt Cat</b>	108 <sup>1</sup>	148	San Antonio, Texas, USA	USA	Construction equipment	19	-	+1 210 648 1111 www.holtcat.com
82	=80 <b>Cleveland Brothers Equipment Co</b>	106 <sup>1</sup>	100 <sup>EST</sup>	Murrysville, PA	USA	Construction equipment	21	-	+1 866 551 4602 www.clevelandbrothers.com

concerned, the top 25 spenders invested €5.9 billion in their fleets last year, down a little from last year's figure of €6.3 billion. Overall, the top 25 spenders invested at a proportion equivalent to around a third of their revenues last year. Five of the top



ten spenders, and the top three, have most of their operations in North America, where fleet replacement and growth has been heavy for several years.

Last year also saw significant merger and acquisition activity in the rental industry. There was Algeco Scotsman's acquisition of US company Target Logistics Management; while the year ended with private equity company Platinum Equity's move to purchase Volvo Rents for €800 million - a business that it has renamed BlueLine Rental.

And there were plenty of smaller deals in between -

Aktio Corp was the highest-ranking Japanese rental company in the IRN100

May saw Ashtead Group acquire UK-based temporary trackway and events rental company Eve (formerly Eve Trakway) for £35 million; July saw tools specialist HSS Hire Services Group acquire UK Platforms, Haulotte Group's UK rental business; while the Kiloutou Group also moved in July to acquire the rental division of fellow French company Trefoulet.

In August, Netherlands-based Rival moved into Belgium by acquiring the aerial work platform business of crane company Sarens Belgium, and Portakabin acquired Oecon Mobilraum GmbH, a manufacturer and distributor of modular buildings in Germany; and over in Australia, Coates Hire acquired the general rentals business assets of Force Group

TABLE 5

## IRN100 Growth league

COMPANY	% GROWTH
1 Algeco Scotsman	49.7%
2 Madisa	29.8%
3 Solaris Equipamentos E Servicos	25.8%
4 Aktio Corp	23.8%
5 GAP Group Ltd	19.5%
6 HSS Hire	17.9%
7 H&E Equipment Services	16.8%
8 United Rentals	11.4%
9 APR Energy	10.9%
10 Ainscough Crane Hire Ltd	9.2%
11 Neff Rental	8.1%
12 Ahern Rentals	6.0%

TABLE 6

## IRN100 Top 10 'Global' players

RANK	COMPANY	REVENUES (€ MILLION)	NOTES
1	<b>Aggreko</b>	1441	UK, US
2	<b>Ashtead Group</b>	1302	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia
3	<b>Algeco Scotsman</b>	1017	US, Canada, France, Spain, China, Saudi Arabia
4	<b>Hertz Equipment Rental Corp</b>	592	58 countries globally
5	<b>Sarens</b>	406	UK & Ireland, Middle east, North Africa
6	<b>Speedy Hire</b>	308	US, Canada, South & Central America, South Africa, Iraq, Afghanistan, Philippines, Australia
7	<b>AMECO</b>	301	Singapore, Australia, China, Indonesia, Vietnam, Malaysia, Thailand
8	<b>Tat Hong</b>	290	Germany, Austria, Czech/Slovakian Republics, Russia
=9	<b>Emeco Holdings</b>	284	Australia, Canada, Indonesia, Chile
=9	<b>Lavendon Group plc</b>	277	Netherlands, Belgium, Germany, Luxembourg, Czech, Slovakia, Austria, Poland, Italy.

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

TABLE 7

## IRN100 Capital expenditure Top 25 investors

COMPANY	GROSS CAPITAL EXPENDITURE 2013 (€ MILLION)
1 United Rentals	1144
2 Ashtead Group	702
3 Hertz Equipment Rental Corp	486
4 Aktio Corp	447
5 Aggreko	272
6 Komatsu Rental	241
7 Loxam	239
8 H&E Equipment Services	219
9 APR Energy	210
10 Algeco Scotsman	187
11 Sunstate Equipment Co	185
12 Nishio Rent All Co	161
13 Mills Estruturas e Serviços de Engenharia	155
14 Nikken Corp	137
15 Sarens	131
16 Cramo	130
17 Ramirent	125
18 Zeppelin Rental	121
19 AMECO	110
20 Hitachi Construction Machinery Japan	108
21 Emeco Holdings	102
22 Coates Hire	89
23 Neff Rental	88
24 Speedy Hire	83
25 Ahern Rentals	81

<b>TOP 25 SPENDERS</b>	(-25.4%)	€5.9bn
TOP 25 (2012)	(+10.5%)	€6.3bn
TOP 25 (2011)	(+211%)	€5.7bn
TOP 25 (2010)	(+209%)	€2.7bn
TOP 25 (2009)	(-70%)	€1.29bn

in Townsville, Queensland and Darwin, Northern Territory.

The Autumn saw yet more deals, with NES Rentals completing its purchase of US-based West Georgia Aerial Lift. HSS Hire also acquired TecServ, a company that services contract cleaning equipment in the UK; and French rental company Kiloutou acquired MOST Location, a family owned access rental company with around 1000 aerial platforms.

This is just a handful of the many deals that were

TABLE 8

## ERN50 European rental revenues 2013

RANK 14 13	COMPANY	2013 REVENUES (€M)
1	Loxam	805
2	Cramo	657
3	Ramirent	634
4	Algeco Scotsman	Est 522
5	Kiloutou	471
6	Sarens	Est 446
7	Speedy Hire	Est 383
8	Liebherr-Mietpartner	302
9	Mediaco Levage	300
10	Zeppelin Rental	290
11	Boels Verhuur	280
12	HKL Baumaschinen	272
13	HSS Hire	270
14	Aggreko	265
15	Ashtead Group	246
16	Lavendon Group plc	230
17	VP PLC	199
18	Portakabin	Est 190
19	TVH Group	185
20	Mammoet Holding BV	Est 184
21	Select Plant Hire	Est 175
22	ADCO	Est 174
23	GAP Group Ltd	141
24	Nordic Crane	139
25	Streif Baulogistik GmbH	Est 135
26	Lambertsson Sverige AB	Est 131
=27	Peinemann Holding B.V.	130
=27	Ainscough Crane Hire Ltd	130
29	Hewden	120
30	Riwal	Est 110
=31	Compagnia Generale Trattori (CGT)	103
=31	Touax	103
33	Utleiecompagniet AS (UCO)	96.8
34	Hertz Equipment Rental Corp	Est 95
35	Prangl Gesellschaft M.B.H.	93.8
36	Jewson Tool Hire	Est 90
37	Brandon Hire	89.6
38	General de Alquiler de Maquinaria (GAM)	Est 86.7
39	Pekkaniska Group	84
40	Foselev	Est 80
41	Atlas Copco Specialty Rental Div.	Est 79.1
42	Arcomet	Est 70
43	HUNE Rental	68.9
44	Salti	66
45	Skanska Maskin	62.7
46	Grupo Eurogruas	Est 60
47	De Boer Structures	55.1
48	Gruppo Venpa 3	49
49	Nixon Hire	43.6
50	Malthus	32
	<b>TOTAL (€ million)</b>	<b>10.02</b>



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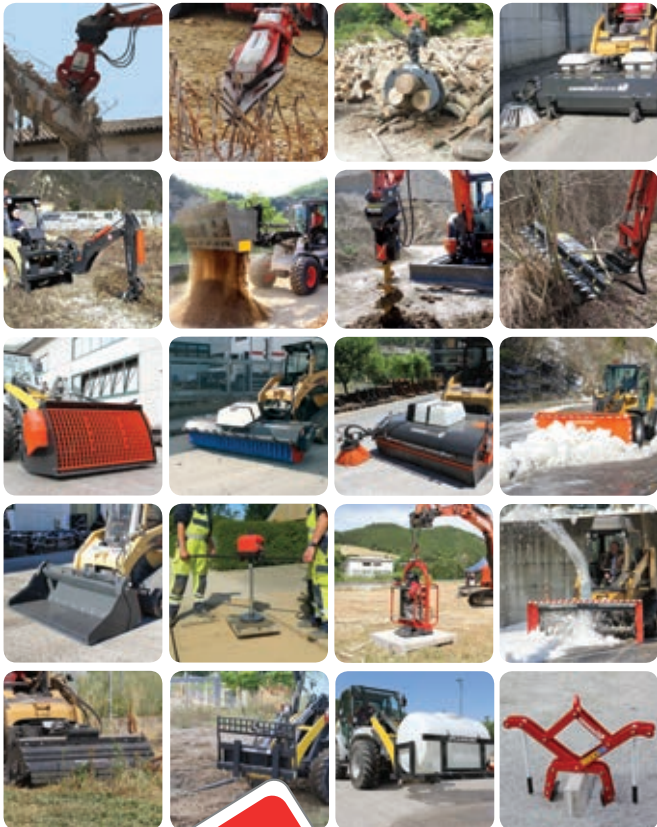
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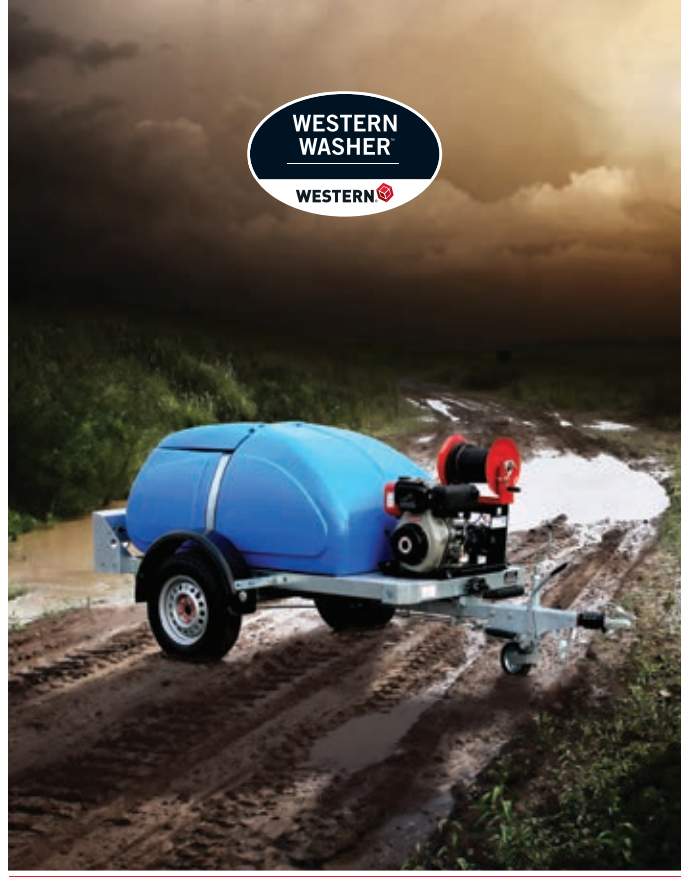
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		13/14	12/13				DEPOTS	STAFF	
<b>=83</b> 76	<b>Compagnia Generale Trattori (CGT)</b>	<b>103</b>	108	Milan, Italy	Italy	Construction equipment	54	200	+39 02 274 271 www.cgt.it
<b>=83</b> 98	<b>Touax</b>	<b>103</b>	117	Paris, France	Europe, USA, Asia, South Africa	Portable accommodation	-	-	+33 1 46 96 18 00 www.touax.com
<b>85</b> =80	<b>Arcomet</b>	<b>100</b> EST	100 EST	Paal, Belgium	Worldwide	Tower cranes	-	-	+32 11 450 950 www.arcomet.com
<b>86</b> 77	<b>Utleiecompagniet AS (UCO)</b>	<b>96.8</b>	107	Kjeller, Norway	Norway	Construction equipment, tools, cranes	17	283	+47 400 06 450 www.uco.no
<b>87</b> 93	<b>Red-D-Arc Welderentals</b>	<b>94</b> EST	82 EST	Grimsby, Canada	USA, Canada, Mexico, UK, France, NL, Germany, UAE	Welding/power	70	550	+1 905 643 4212 www.reddarc.com
<b>88</b> 82	<b>Prangl Gesellschaft M.B.H.</b>	<b>93.8</b>	99	Brunn/Gebirge, Austria	Europe	Cranes, aerial platforms	20	628	+43 02236 326 350 www.prangl.at
<b>89</b> 90	<b>Energyst BV</b>	<b>92.5</b> EST	84	Breda, Netherlands	Europe, South Africa, Chile, Argentina	Power, temperature control	-	-	+31 (0)800 3637 4978 www.energyst.com
<b>90</b> 88	<b>Jewson Tool Hire</b>	<b>90</b> EST	87	Coventry, UK	UK	Tool hire	-	-	+44 024 7643 8400 www.jewson.co.uk/tool-hire
<b>91</b> 83	<b>Brandon Hire</b>	<b>89.6</b>	94	Bristol, UK	UK	Construction equipment, tool hire, party/events	155	865	+44 (0)117 972 0872 www.brandonhire.co.uk
<b>92</b> NEW	<b>Equipment Depot</b>	<b>89</b> EST	-	Texas, US	North America	Construction equipment, access equipment	45	1750	(+1)7138696801 www.eqdepot.com
<b>=93</b> =95	<b>AmQuip Crane Corp</b>	<b>85</b> EST	80	Philadelphia, PA, USA	USA, Canada, Mexico, Puerto Rico	Cranes	13	500	+1 215 639 9200 www.amquip.com



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RANK 14 13	COMPANY	TURNOVER (€ MILLION)		HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF		CONTACT DETAILS
		13/14	12/13				DEPOTS	STAFF	
<b>=93</b> 97	<b>Byrne Equipment Rental</b>	<b>85</b> <sup>EST</sup>	80 <sup>EST</sup>	Dubai, UAE	UAE, Oman, Qatar, Saudi Arabia	Construction equipment, portable accommodation, events	-	-	+971 4 4544800 www.byrenrental.com
<b>95</b> 92	<b>Pekkaniska Group</b>	<b>84</b>	83	Vantaa, Finland	Fin, Swe, Rus, Ukr, Baltics	Aerial platforms and cranes	27	350	+358 10 6622 000 www.pekkaniska.com
<b>96</b> =95	<b>McGrath Rentcorp</b>	<b>80.4</b>	80	Livermore, California	USA, Canada	Portable accommodation	5	466	+1 925 606 9200 www.mgrc.com
<b>=97</b> 89	<b>Rental Solutions &amp; Services (RSS)</b>	<b>80</b> <sup>EST</sup>	85 <sup>EST</sup>	Dubai, UAE	Middle East, Pakistan, Africa, Cyprus	Power, temperature control	-	-	+971 4 8849699 www.rss.ae
<b>=97</b> 94	<b>Foselev</b>	<b>80</b> <sup>EST</sup>	81	Aix-en-Provence, France	France, Congo, Gabon	Cranes, portable accommodation, aerial platforms	-	-	+33 4 42 24 57 57 www.foselev.com
<b>=97</b> 99	<b>Briggs Equipment</b>	<b>80</b> <sup>EST</sup>	75 <sup>EST</sup>	Dallas, TX, USA	US, Mexico, UK	Construction equipment	-	-	+1 214 630 0808 www.briggsequipment.com
<b>100</b> =84	<b>Force Access</b>	<b>75</b> <sup>EST</sup>	91	Sydney, Australia	Australia	Aerial platforms	-	-	+61 2 9735 7600 www.forceaccess.com.au
<b>TOTAL</b>		<b>31.45 bn</b>							

agreed during the course of 2013, and demonstrates the constantly changing face of the equipment rental industry.

### New entrants

There were five new entrants to the list this year - four of which are first-time entrants, while one, Equipment Depot, returns after a few years out of the list. It says a lot about the current market that all five are from North America, including two crane companies - TNT in the US and NCSG of Canada - one pump renter, National Pump, and Compact Power Equipment Rental (CPER).

National Pump is now owned by United Rentals, but was an independent company for the whole of 2013 so is included in the survey. CPER is the company that runs rental operations at hundreds of Home Depot stores in the US and Canada. It does not publish its financial data, so our €145 million estimate should be treated with much caution.

TABLE 9

## IRN100 Capital expenditure trends

	2013	2012	2011	2010	2009
<b>25 biggest spenders</b>	<b>€5.9bn</b>	€6.3bn	€5.7bn	€2.46bn	€1.29bn
<b>Other 75</b> <sup>(EST)</sup>	<b>€3.0bn</b>				
<b>TOTAL</b> <sup>(EST)</sup>	<b>€8.9bn</b>				
<b>Investment rate</b> (gross CapEx/revenues)	<b>28%</b>				

So, as is often the case, painting a simple picture of the worldwide rental industry is impossible, with currents in North America, Latin America and Japan running stronger than in Europe and Australia. Best to take comfort from a simple fact: the overall growth in adjusted IRN100 revenues last year was 2.6 times higher than global GDP growth. Whatever is happening in your part of the world, you are part of an expanding industry.

**IRN**

## More information

An expanded version of the IRN100, giving additional analysis and company information, will be available to purchase from KHL in early July 2014. For details please go to:

[www.khl.com/information-store](http://www.khl.com/information-store)

TABLE 10

## IRN100 Near misses

RANK	COMPANY	2013 REVENUES (€M)	LOCATION	TYPE OF RENTAL	CONTACT DETAILS
<b>101</b>	<b>Warren Cat</b>	<b>74</b> <sup>1</sup>	Texas, US	Construction equipment	www.warrencat.com
<b>102</b>	<b>Grupo Eurogruas</b>	<b>70</b> <sup>EST</sup>	Seville, Spain	Cranes, aerial platforms, transport	www.eurogruas.com
<b>103</b>	<b>Ohio Cat</b>	<b>70</b> <sup>1</sup>	Ohio, US	-	www.ohioat.com
<b>104</b>	<b>A Geradora Aluguel de Maquinas</b>	<b>69.7</b>	Salvador, Brazil	Construction equipment, parties and events	www.ageradora.com.br
<b>105</b>	<b>HUNE Rental</b>	<b>68.9</b>	Madrid, Spain	Construction equipment	www.hune.com
<b>106</b>	<b>Salti</b>	<b>66</b>	Marcq en Baroeul, France	Construction equipment, tool hire, parties/events	http://salti.fr/
<b>107</b>	<b>Komatsu Cummins Chile Arrienda</b>	<b>64.7</b>	Santiago, Chile	Construction equipment	www.komatsuarrienda.cl
<b>108</b>	<b>Skanska Maskin</b>	<b>62.7</b>	Solna, Sweden	Construction equipment	www.skanska.se/maskin
<b>109</b>	<b>De Boer Structures</b>	<b>55.1</b>	Alkmaar, Netherlands	Party/events, marquees	www.deboer.com
<b>110</b>	<b>Gruppo Venpa 3</b>	<b>49</b>	Dolo, Venice, Italy	Aerial platforms, construction machines, rough terrain cranes without operator, telehandlers	www.gv3.it



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# Reducing the cost of

**Many manufacturers are forecasting growth in mini excavator sales this year and are keen to ensure customers get value for money when investing in new machines. IRN reports.**

**E**urope's market for construction equipment is expected to increase from an estimated €8 billion in 2013 to more than €9 billion by 2017, according to Off-Highway Research. With one in three machines sold in the region a mini excavator, demand for these popular machines seems set to rebound.

In this competitive industry, many manufacturers



are putting huge efforts into making their latest machines more efficient in order to reduce ownership costs for contractors.

Indeed, the relevant off-highway diesel exhaust emissions laws affecting compact equipment are now in place (EU Stage IIIB/US Tier 4 Final). Many expect these regulations to be the final big step in emissions laws for some time - and now research and development spends can be refocused elsewhere.

From new engines to load-sensing hydraulics, telematics systems and new travel modes, manufacturers are working hard to introduce fresh technology to these compact machines.

And plenty of new mini excavators - both conventional tailswing models, which have an overhanging counterweight, and zero tailswing models, which do not - have been launched in recent months.

## Rental machines

Bobcat's new 8 t class E85 model, for instance, is now making its way onto the rental market. Powered by a 44.3 kw Yanmar engine, the machine boasts an upgraded hydraulic system that is said to result in higher pressures and flows - in fact it claims bucket

Yanmar Construction Equipment's Reynaud, "Fuel consumption on the new SV26 - which replaces the B25V - has been reduced by 20%".



One of the first rental customers for Kelsey Plant Hire's new Bobcat E85 excavator was NWJ Bignell Landscape Contractors.



digging forces have been increased 13% over the previous model.

UK-based rental company Kelsey Plant Hire recently bought five new Bobcat compact excavators, including an E85 model, 1.6 t class E16, 2.5 t class E26 and 4.6 t class E45 - all supplied by Bobcat of London.

Nadine Clark, Kelsey Plant Hire joint director, said the purchases were part of expansion plans to meet a growth in demand and increased confidence in the market.

"Following an excellent period in the second half of 2013, which has continued in the first part of the year, we have decided to expand our fleet to meet the increased demand," Ms Clark explained.

One of the first rental customers for Kelsey Plant Hire's new Bobcat E85 excavator was NWJ Bignell Landscape Contractors, which is a groundworks and landscaping business based in Coulsdon, Surrey.

Owner Gary Bignell said, "I will definitely be asking for the E85 for use on some of our future projects where its responsiveness, digging power and manoeuvrability will be key assets."

Reduced operating costs were also a key factor in

Caterpillar's 308E2 compact radius excavator claims a more efficient engine and hydraulic system.

# ownership



Kobelco Europe has introduced three new mini excavators in the shape of the 2.6 t SK27SR, 3.4 t SK30SR (pictured) and 3.7 t SK35SR zero tailswing machines.



Wacker Neuson's 900 kg dual power 803 mini excavator. The manufacturer said the fact that one machine combined both diesel and electric drives was an advantage for rental customers.

Kubota's latest new launch - the near-zero tail swing U27-4. This is a 2 to 3 t class machine that comes fitted with anti-theft technology to increase fleet security. The company said it was designed after extensive research and development with operators worldwide.

Neil Winfield, Kubota Construction business development manager, said the machine had been designed to reflect market demand.

"The feedback we received in the 2.5 t class highlighted that users wanted more space in the cabin and increased comfort levels, while not compromising on performance levels. The new Kubota U27-4 machine has been manufactured to exceed these requirements."

Production has also now begun on Yanmar's latest mini excavator - the 2.6 t SV26, an ultra-short radius machine, aimed at a range of applications, including urban renewal, agriculture and landscaping.

Power comes from a 3 cylinder, 1.4 litre Yanmar diesel that generates 17.4 kw at 2,400 rpm. The machine is also available with an auto-idle option to reduce further its fuel consumption, which Yanmar said stood at less than 4 litres/h.

In fact, Yanmar Construction Equipment Europe managing director Jean-Marc Reynaud said fuel consumption on the new model - which replaces the →



Reduced operating costs were a key factor in Kubota's latest launch - the 2 to 3 t class, near-zero tail swing U27-4.

B25V - had been reduced by 20%.

"We are targeting the European rental market with the SV26," he said. "We are at the beginning of a new fleet replacement cycle in Europe, and this year we are forecasting growth particularly in the UK and French rental markets. We aim to sell up to 400 SV26s this year both to direct buyers and rental companies."

**Gearing up for growth**

For its part, manufacturer JCB said it was gearing up for "massive growth" in the compact excavator market, a sector it said was expected to increase to over 200000 units by 2017.

JCB said its latest launches - the 6.7 t class 67C-1, 8.5 t class 86C-1 conventional tailswing models, and 8.5 t 85Z-1 zero-tailswing model - were part of its push to grab a bigger share of the market.



Volvo CE has updated its mini excavator line-up with the introduction of the 5 t class ECR50D short tailswing model.



The latest compact excavator from Hyundai comes in the form of the 6 t class R60CR-9A, replacing the previous R60CR-9.

And reduced operating costs were at the heart of the design process, according to the company. All three models sport Stage IIIB/Tier 4 Final-compliant engines, and JCB claims they consume 10% less fuel than previous models. Engine rpm also automatically drops below the idle speed when the operator's arm console is lifted, which JCB said helped with saving fuel and also reducing noise levels.

Meanwhile, David Wood, Caterpillar product application specialist for mini-excavators, said 2013 had been a relatively good year for sales.

"We continued to see growth in Northern Europe and the UK. In addition, in Poland the mini-excavator is starting to replace manual labour. The 8 t mini excavator market has seen particularly good sales, with the Cat 308E2's versatility and compact dimensions perfectly suited to on-highway utility projects."

Caterpillar has a manufacturing alliance with Wacker Neuson, which itself has introduced a new dual power version of its 803 mini excavator. This 900 kg machine can, in addition to the standard diesel engine, be connected to the external HPU8 electro-hydraulic drive unit.

However, the dual power option will not be available on the mini excavators supplied to Caterpillar through the manufacturing alliance.

"The use of alternative power in mini-excavators will continue to grow for indoor applications," Mr

**Production begins on new mini model**

At its plant in Tuscany, Italy, Ihimer has started production of the first model in its new V4 series of mini-excavators.

Ihimer, which is a joint venture between Japanese manufacturer IHI Construction Machinery and Italy's IMER Group, presented the first prototypes from the new range last year. The first production model to roll out of the factory is the 2.7 t class 27V4.

Ihimer said the production start marked the beginning of a phase of industrial development of vital importance to the Italian construction equipment sector as a whole.

The manufacturer said 200 27V4 units would be produced before December this year, with orders already placed for more than 70% of this total. It said the machines would be distributed throughout Europe.

Available in both canopy and cab versions, the 27V4 boasts a 13.6 kW IHI S773-C engine that the company said kept fuel consumption and emissions to a minimum, and has a front swing radius of 2,030 mm and tail swing radius of 775 mm.

The manufacturer said 200 27V4 units would be produced before December this year.



The 4 tonne class Hitachi ZX38U-5 was purchased by Italian contractor BTF and put to use on a utilities project in Perugia. The contractor said the machine was high-tech but reliable.



## Factory-fitted tiltrotators as an option

From May 2014, Volvo CE started offering a factory fit tiltrotator option on its 5 and 8 tonne compact excavators in Europe - the Steelwrist couplers feature a front pin lock (FPL) and integrated control system, as well as a tilt angle of up to 450°.

Attachment product manager for Volvo CE Sales Region EMEA (Europe, Middle East and Africa) Gilbert Ray said, "Symmetrical type attachment systems are now the leading type of quick coupler used on excavators in the majority of European markets, and this factory fit option again sees Volvo at the forefront in the industry."

The installation includes integration with the excavator's own safety systems, as well as ergonomic, multifunctional joysticks and a colour display. The FPL system is also said to exceed regulatory requirements and means that attachments are engaged through two separate mechanical locks.

"The risk of dropping a bucket immediately after a tool change is considered by leading construction companies to be one of the greatest safety risks on a construction site," said Mr Ray.

"The patented positive lock indicator means the coupler indicates to the operator that the coupler is locked in position and therefore greatly reduces the risk of dropping. This innovative system differs from other symmetrical quick couplers in that they only have a negative indication, which signals that the coupler is open.

"The factory-ready option means uniform installation of the tiltrotator system. Dealers will not have to use workshop facilities to fit the system, and customers will have the reassurance that fitment is identical time and again, and fully supported by Volvo in respect of warranty and parts."

A similar system will be available from Steelwrist for retrofit on existing excavators in both established and new markets.

The Steelwrist couplers feature a front pin lock.



Wood said. "Although we monitor developments with interest, we have no immediate plans to introduce a model in this area.

He added, "Our new [8.4 t class] 308E2 compact radius benefits from a more efficient engine and hydraulic system, and delivers up to 13% less fuel

consumption than the previous model, with no impact on digging performance or productivity."

Volvo CE has also updated its mini excavator line-up with the introduction of the 5 t class ECR50D short tailswing radius model. The manufacturer claimed this model, too, was more efficient than



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its predecessors, boasting a 10% reduction in fuel consumption thanks to an ECO mode, load-sensing hydraulics, and an automatic idling system and engine shut-down function.

**Latest machines**

The latest compact excavator from Hyundai comes in the form of the 6 t class R60CR-9A, a short tailswing model that replaces the previous R60CR-9. Here, too, reduced operating costs were a key design goal.

The machine is powered by a 48.3 kw Yanmar



Hanix's new H09D micro and H17D are designed with the rental industry in mind, and have steel body panels and a top-mounted boom cylinder to protect from damage.



JCB's 8.5 t class 85Z-1 zero-tailswing excavator is said to consume 10% less fuel than previous models.

4TNV98C, Tier 4 Final/Stage IIIB-compliant diesel engine, which Hyundai said offered a 10% increase in power over the previous model, while reducing fuel consumption by 14%.

Meanwhile Hanix, which is a brand owned by Japanese manufacturer NKK and its parent, China's Beijing Jingcheng, has introduced a new model on the smaller end of the weigh scale. It is one of several players offering micro excavators (less than 1 t operating weight).

Its latest machines include the 990 kg H09D micro and the 1.7 t H17D mini, both of which are designed for space-restricted urban sites, and also targeted towards the rental industry.

Body panels are all steel construction to withstand

everyday site knocks, and the boom cylinder is located above the boom to protect it against accidental damage when digging.

Kobelco Europe, meanwhile, has introduced three new mini excavators into the region in the shape of the 2.6 t SK27SR, 3.4 t SK30SR and 3.7 t SK35SR zero tailswing machines. All three are built in Japan and were expected to start arriving in Europe in May.

Lowering operating costs was a key design feature here as well - the new machines boast a new dozer blade and a boom offset function to allow digging along trenches and walls. In addition, triple oil-pump technology is said to ensure continuous and refined digging, travel and load performance, according to the manufacturer.

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The 180 ft (54.9 m) Genie SX-180 from Terex AWP at its Moses Lake plant in Washington state, US.

# Positive markets

**The worldwide market is picking up, albeit slowly, and manufacturers are innovating to meet the trends that have emerged during the difficult economic years. Euan Youdale reports.**

Every year the International Powered Access Federation (IPAF) produces its US and European Powered Access Rental Market Reports. Its 2014 report shows Europe remains stable, marked by stark differences across different countries.

Germany, Norway, Sweden and the UK saw their rental revenue increase around 5%. However, rental companies remained cautious and kept an unchanged split between construction and non-construction applications.

In Germany, fleet size and rental rates increased slightly. In Sweden, fleet size and rental revenue

increased while rental rates were maintained at a stable level. Other countries such as Denmark and France saw the rental market remain flat or decrease slightly. In Denmark, neither the fleet nor the rental rates increased.

Marking the contrasts across Europe, rental decreased in Finland, Italy and the Netherlands, and decreased strongly in Spain. Overall, the report says growth is expected in Europe in 2014.

From a manufacturer's perspective, JLG said its first quarter 2014 financial results showed orders from Europe coming in a little earlier than expected. Frank Nerenhausen, JLG president, comments, "I think we feel collectively that the bottom has been reached and there are growth opportunities albeit distributed within the region. You've got certain areas that are expected to grow 3% and 4%, and those that are in decline, and that's going to be an issue for a while - it's some slow recovery on a regional basis, early stages."

Turning to the world's biggest aerial work platform (AWP) market, the US rebounded with stellar growth of around 10% in 2013, says the IPAF report. It results from a slight increase in new machine investment coupled with a reduction in fleet sell-offs. Similar fleet growth is expected in 2014.

At Genie, which has consistently outshone Terex Corp's other divisions, North America is the primary driver of recovery. "The way I would describe the market is predictable and positive," says Matt

Metrolift purchases the 100000<sup>th</sup> Skyjack SJIII 3219.





Custom Equipment was showing its Hybrid-Lift range at ConExpo.

Fearon, Terex AWP president. "We find the rental companies talk to us much more than in prior cycles, and are talking longer term. Then in six months you meet with them again and they are sticking with their plans. So, I think we are in a really good spot."

On the subject of emerging markets, South America, Brazil in particular, is one of the most talked about, "Obviously its growth has been extraordinary and you'd think there is plenty of runway for growth there yet, but as in any emerging market there are still challenges, the whole concept is still evolving," comments Mr Nerenhausen.

"If you look at a typical US job site that has 200 machines and you look at similar jobsite in Brazil it may have 20-25 machines on it, so there is still quite a bit of penetration for those types of."

China too has its challenges; there is growth, but it's marginal and manufacturers are in a perpetual waiting game. "China is going to be a huge market, but I don't know when," says Mr Fearon, "I would say it is developing slowly and we turned the corner with profitability in 2013."

Last year Terex AWP's Genie brand changed its strategy in China by dropping the scissor and booms it launched for the Chinese market at Bauma China in 2012. The company is now focussing on its standard worldwide products at its factory in Changshou. "We started trying to do these low cost alternatives with less features so that we could get that price point.

But we found over time that China is no different to Eastern Europe or other places - they want the same spec. So we shifted our strategy to making the core higher volume products in China for the country."

### Superbooms

Between them, JLG and Terex have established the era of the superboom. JLG launched the world's largest self-propelled boom, the 185 ft (56.4 m) working height 1850SJ Ultra Boom at ConExpo. It rivals Terex AWP's 180 ft (54.9 m) Genie SX-180 boom, first presented at Bauma last year.

The JLG 1850SJ delivers 19 storeys of working height, and, the manufacturer says, has moved AWP's into applications previously reserved for truck-mounted booms. It offers almost three million ft<sup>3</sup> (84951 m<sup>3</sup>) of reachable space and an 80 ft (24.4 m) outreach. Maximum capacity is 1000 lbs (454 kg) and the boom extends from ground to full height in less than five minutes. It is aimed at applications, including steel erection, energy-related construction, power generation, stadiums, convention centres and theatre construction.

The Genie SX-180 offers a 180 ft (54.9 m) vertical reach and 80 ft (24.4 m) horizontal reach. The 8 ft by 3 ft (2.4 m by 0.91 m) working platform has an

The 185 ft (56.4 m) JLG 1850SJ Ultra Boom has 3 million cubic feet of reachable space.



unrestricted capacity of 750 lbs (340 kg) and a 180° rotating jib.

Following the launch of these two monsters, are other manufacturers gearing up to produce a 190 ft (57.9 m) boom, or at least a model in that height range? The answer, generally, seems to be no, for now at least.

Skyjacks' biggest telescopic boom is the 72 ft (21.9 m) working height, or 66 ft (20.1 m) platform height SJ66T. Brad Boehler, Skyjack president, says he is more interested in filling out the smaller boom line first. Talking about the two superbooms from JLG and Terex AWP, he adds, "Maybe they will create a market space, but it will be a while before we get to 100 ft (39.5 m). It will be a few years before we are competing in that market space"

At the moment the company is working on an 80 ft (24.4 m) platform height model. Before that the company will be working on a small articulated boom, and then an 80 ft (24.4 m) articulated boom. "Products have to be safe and meet requirements. It becomes more and more complicated the bigger you get."

Apart from the control system and boom length, there is the ground pressure to take into consideration. "In certain configurations you may have 50% of the load on one wheel, and you need to be aware of the fact it could punch through the floor," adds Mr Boehler.

Alexander Saubot, president of Haulotte Group, is adamant that his company will not see a superboom to match the likes of the SX-180 or 1850SJ anytime soon. He says, "I don't believe that we should spend that much money on that type of machine. We will





Pecolifts in use at the UK£50 million fit-out of the News Corporation building (Baby Shard), Southwark, London, UK. Main contractor is ISG.

monitor how many they sell."

Instead, Haulotte is also concentrating on lower working heights with a new series of rough terrain articulated booms in the 16 m working height category. The French manufacturer designed the three-model HA16 RTJ series to access the most difficult working areas. It has a maximum outreach of 8.3 m and an up-and-over clearance of 7.65 m. It also offers the industry's quickest lifting speed to full height in 40 seconds, says the company.

Returning to superboms, Snorkel may have something in the pipeline. Don Ahern, Snorkel's new majority owner, told *IRN* that it would be looking at the very large boom segment over the next

few months with a view to potentially coming up with a design. The emphasis, he said, would be on outreach, rather than a maximum working height. So, watch this space.

Snorkel was the subject of one of the access industry's biggest talking points this year, when it returned to US ownership. Las Vegas based Xtreme Manufacturing acquired majority ownership of the business from UK-based Tanfield, which retains a 49% share.

Xtreme is the telehandler manufacturer owned by Don Ahern, also owner of rental giant Ahern Rentals. The deal will see Xtreme invest between US\$35 and \$50 million (€26 to €37 million) on a recovery plan. The strategy will be for Xtreme to use Snorkel's global sales network to boost exports

of its telehandlers, while Snorkel's volumes will be increased by sales to Ahern Rentals, historically one of its biggest customers.

In recent years shortage of working capital has constrained Snorkel's ability to exploit opportunities in the powered access market. It made losses of UK£14.6 million (€17.9 million) in 2012. Subject to Snorkel making profit targets Xtreme will increase its share of ownership over time, and hopes to propel Snorkel higher up the rankings in terms of revenue.

### Scissor focus

To achieve such financial feats, manufacturers have to be strong in the core products segments and working heights.

One of them, Scissor lifts, may not be the most glamorous products when it comes to access equipment but they are perhaps the most important, particularly if we look at sales volumes. For that

## Breaking records



The countdown is on to the eighth APEX aerial work platform exhibition, taking place in June, and it is shaping up to be the best ever, according to *IRN's* sister magazine *Access International*.

The three-day show at the Amsterdam RAI Exhibition Centre in the Netherlands, 24-26 June, this year will break records for exhibitor numbers and space. It will also boast dozens of product launches - see the May issue of *Access International* for a full round-up of the new machines.

More than 100 exhibitors from all over the world, including China, have confirmed their stand space and will demonstrate their products and services in a live environment. It will feature an inside exhibition area of 11000 m<sup>2</sup> - a substantial increase from the 10000 m<sup>2</sup> at the last APEX show, held at MECC Maastricht in 2011. The outside area will be 10000 m<sup>2</sup>, almost double the size of the outside area at the last edition.

The event will serve as an important platform for networking, knowledge sharing, and shaping the industry's future. "We can already say that APEX 2014 will be the biggest international access industry fair anywhere in the world," said Tony Kenter, managing director of show organiser Industrial Promotions International (IPI).

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reason manufacturers are busy working out ways to save their customers time and money.

One of the busiest companies this year has been Skyjack. Apart from announcing the winner of its Quest2013 to find the oldest working machine produced in the manufacturer's 30 year history, it has also sold its 100000<sup>th</sup> SJIII 3219 scissor.

The year-long Quest 2013 was launched at last year's Rental Show in Las Vegas and took in most regions of the world, including South America and Asia. Finally the oldest surviving machine, a 6.4 m working height SJ006-10, was tracked down in Skyjack's home country of Canada, belonging to Kraner Electrical.

Meanwhile, at the Rental Show, Chicago-based Metrolift was celebrating its purchase of the 100000<sup>th</sup> Skyjack SJIII 3219. The company has a fleet of 1800 machines, with 1000 of them being Skyjack scissors. According to Skyjack it is the world's best-selling scissor platform.

The next month at ConExpo, in Las Vegas, Skyjack was making its move into the next generation of scissors. The company launched a new electrically powered rough terrain model, the SJ6832 RTE – the first Skyjack product to be completely AC powered. Skyjack described it as the "most compact machine on the market that is capable of lifting 1000 pounds (453.6 kg) to 32 ft (9.8 m)." It is the only machine in its category with four-wheel drive and 45% gradeability as a standard design, says the company.

The zero-emission scissor lift was built on the

The Snorkel S3970RT has now been ANSI certified and is available to order in the US.

same chassis as the existing diesel and dual fuel 68RT units. "There is more and more demand for something with zero emissions as it's more universal on the job site - being the first in and last out," says Skyjack president Brad Boehler.

Terex AWP has also been making the running with electric option rough terrain machines. Its latest offering is the new GS-69BE (Bi-Energy) hybrid electric scissor lift series, first launched in January this year, then shown at the Rental Show in Orlando, in February. It's the evolution of the current Genie 69 in RT and DC scissor series.

At JLG, Jeff Ford, global product director, aerial work platforms, thinks further expansion of direct electric drive is inevitable. "Originally back in the 90s with electric booms and now with electric scissors, the use of electric drive has just really changed everything. Not only does it reduce leak points but it provides a lot more duty cycle which people appreciate, because they forget to plug scissors in, etc, and so I think that's something you will see expanding in the scissor market."

Snorkel. The company also showed a compact, mini scissor, the now-ANSI-certified S3970RT which was previewed at Bauma. The 10 ft (3m) platform height, 30 in (762 mm) wide S3010E is now ANSI certified for the North American market. The company said the mini scissor stems from interest



in Europe for the Pop-Up product line, but with a need for a driveable option. The S3010E has a "high amp/hour rating for an extended operating period between battery charges."

### Rough terrain machine

Aiming itself at the mature European and US markets is US-based MEC Aerial Work Platforms. It has introduced a 60 ft (20.2 m) rough terrain scissor to compete with European-produced models in their home countries. It made its debut at ConExpo.

The MEC 6092RT is the largest scissor to be manufactured in North America and joins the MEC '92' Ultra-Deck rough terrain scissor lift series. It is based on the existing MEC 5492RT, which up until now has been North America's tallest production scissor lift.

Jim Tolle, MEC director of international markets, said, "The justification behind the 6092RT is to address the highly priced European competitive models. We have recognised a large gap in the large deck European scissor lift product range versus the large deck North American product range."

Moving away from high level access, the low level access market is a massively untapped area and one that manufacturers are becoming increasingly interested in. The UK leads the way in this sector and will continue to do so for the foreseeable future now that PAS 250 is a Publicly Available Specification for low-level work there. The specification covers equipment with one working platform and side protection, for use by one person with a maximum platform height of less than 2.5 m.

Taking a step back in history, the initial introduction of powered low level access equipment in the UK followed the introduction of the HSE's Work at Height Regulations in 2005, says John

Mantall's booth at BICES 2013.

Bungay, business development manager of podium manufacturer Youngman. "There was a substantial uptake, but then the industry realised you had to be just as competent and trained in this equipment as with a podium. Therefore that peak has come and gone.

"However it did kick start the micro powered access sector, which is now big. But I do not think it will take over from podiums." Although, he adds, "I do see a move away from stepladders. The Work at Height Regulations has seen a reduction in ladders and a move to low level access with guardrails."

Power Towers introduced its non-powered Picolift



MEC's 6092RT is the largest scissor to be manufactured in North America.



vertical mast last year and the response so far has been impressive, with 1000 units bought by the UK's Nationwide Platforms and 1000 going to Hire Station. The Pecolift is a 3.5 m working height pusharound with a patented stored powered system that enables the operator to wind the platform up and down easily. Safe working load is 150 kg for one person and tools.

The Pecolift looks to be spreading its wings with interest from DK Rentals in Belgium, a subsidiary of Nationwide owner Lavendon Group. There is also potential from big contracts in the Middle East.

Hybrid Access Platform is the UK and Ireland distributor for Custom Equipment's powered Hy-Brid machines. The HB-P 3.6, HB-P 4.5 and the HB-P 5.0 pusharound models, a 5 m working height model, being the company's latest launch. It says the product allows it to target customers it was finding difficult to get, i.e. medium sized rental companies that want a one-size fits all machine.

The machines are desirable for those wanting height under 19 ft (5.8 m) and are looking to take market share from podiums, towers and taller scissors. "If you have a 19 ft (5.8 m) machine you have a genuine chance of crushing. If you have a 12 ft (3.7 m) machine that's more appropriate to the worksite, then it reduces the chance of crushing and

that's beginning to come on to the radar of health and safety," said a Hybrid Access Power spokesman.

Earlier this year Bravi launched the Sprint, an update of its longstanding powered low level Caddy vertical mast. It's aimed at the retail, housing and industrial markets and is sold through material handling dealers, such as forklift dealers. Last year at material handling exhibition ProMat exhibition in Chicago, sales manager Marina Torres said there were more than 300 leads for the Caddy. "So we decided to restyle it for that market. The UK and US are now our biggest markets, with the material handling sector growing 10%, maybe even 20%."

To demonstrate the US's mounting interest in low level access, JLG has introduced the LiftPod FT140, initially aimed at the US market. Topping the LiftPod range, it offers a platform height of 14 ft (4.3 m) and a 20 ft (6.1 m) working height.

It is designed as an alternative to ladders and scaffolding and, when disassembled, it fits in the back of a pickup truck, van, or SUV.

The FT140 is powered by a new dual 36V lithium-ion battery system and has a work tray holding up to 33 lbs (15 kg) of tools and materials, with a total platform capacity of 330 lbs (150 kg).

"The JLG FT140 offers an affordable AWP solution to workplace height challenges, especially when compared to traditional access lifts," said Randy Marzicola, JLG Industries director of channel development.

IRN

Bravi recently launched the Sprint, an update of its longstanding Caddy vertical mast.



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# SMOPYC 2014

## SaMoTer

8<sup>th</sup> - 11<sup>th</sup> MAY 2014 - VERONA, Italy

The recent SMOPYC exhibition in Spain and Samoter show in Italy were tests for the markets in both countries, as well as for Europe as a whole.

*IRN* reports.



# Signs of a change

Nothing lays bare the condition of the construction equipment market in a region quite like an exhibition - in the boom years, they are often bursting at the seams with exhibitors and visitors, but when times are hard, the shows shrink too.

This trend was reflected in April's SMOPYC exhibition in Zaragoza, Spain, and May's Samoter show in Verona, Italy. Both exhibitions were tests for the market after a difficult few years, with the global economic downturn taking a severe toll on southern Europe's construction equipment industries, as well as in Europe and internationally.

But while the events were smaller than their previous editions - the triennial Samoter show, for instance, attracted around 40000 visitors and 445 exhibitors, compared to 98000 visitors and 900 exhibitors in 2011 - there was a definite sense of cautious optimism in the air, and a feeling that the worst, at least, was over.

Speaking to *IRN* during Samoter, manufacturers including Boels Rental, Hinowa, Fiorio and VF Venieri made positive noises about how their rental operations had fared so far this year, and their expectations for the months to come (see box story).

Indeed, Italian trade association UNACEA said 2014 started well, with more positive signs for the Italian market. It said the first three months of 2014 saw 1352 machines sold on the domestic market, up 20% year-on-year.

Putting this into perspective, the Italian construction equipment market fell 18% last year to 6192 machines - the sixth consecutive year of declining sales, from a pre-crisis high of more than 30000 machines per year.

Speaking at SMOPYC, AP Aerial Platforms forecast that smaller rental companies would find themselves in better position for when the Spanish market recovers.

President of UNACEA Enrico Santini said the sector needed new legislation, "to avoid a two-speed market that penalises customers purchasing new machines complying with European anti-pollution standards in favour of those who continue to use outdated tools".



Speaking at SMOPYC, Bobcat district manager for Spain Carlos Campos was confident that the worst is over for construction equipment sales in Spain and Portugal.

May's Samoter show was smaller than the previous exhibition, held in 2011.



Samoter, took place at the Verona Exhibition Centre from 8 to 11 May, and this year teamed with asphalt equipment exhibition Asphaltica. The 445 exhibitors that took part included 106 international companies from 27 countries, while trade missions from 40 countries also attended.

Veronafiere, the organiser of the Samoter construction equipment exhibition, confirmed that the next edition of the triennial show will take place from 22 to 25 February, 2017, again in Verona.

### Spanish realism

This year's International Show of Public Works, Construction & Mining Machinery (SMOPYC), meanwhile, took place from 1 to 5 April at the Zaragoza Exhibition Centre, Spain. Organiser ANMOPYC, the Spanish Manufacturer's Association Construction, Public Works & Mining Machinery, claims the event attracted nearly 48000 visitors and 720 exhibitors from 28 countries.

While this compared to the 1253 companies that attended the last show in 2011, international manufacturers such as Wacker Neuson, Hidromek,

## Seen and heard at Samoter exhibition

### Industry figures catch up with *IRN* during May's construction equipment exhibition in Verona, Italy.



**BOELS RENTAL** regional manager for Italy Tarcisio Sciocco said the company planned to open at least one more depot in 2015. "We started from zero in the middle of a bad period [2011], so we are of course growing," he explained. "The crisis has caused Italian customers to realise the value of rental instead of buying machines." Mr Sciocco said the company had already seen revenues jump 50% in the first four months of 2014, compared to last year. "Rental rates are very low still, but for us as a newcomer, every rental deal adds something."



**FIORIO** area manager Alessandro Ferrari said the rental company, which offers a range of equipment including gensets, compressors, forklifts and dust extractors, was battling stiff competition. "We have around 250 competitors - some of which just assemble gensets, and a lot are smaller rivals. There are lots of arguments over rental costs in Italy's construction market, and we are looking to new sectors. The energy market is one area - there are lots of different applications, and lots of long-term projects."



**HINOWA** export manager Enrico Fracca said the company had seen good growth since the start of the year. "For the first quarter, sales were up around 10% compared to last year," he said, adding, "Growth has mainly come from our international business as the Italian market has not changed much yet. We have also been very focussed on what rental companies say to us - it is important to develop machines that the rental industry wants." The company introduced a new tracked dumper at the show - the TX2500 Traxporter, with a 2500 kg capacity.



**VF VENIERI** managing director Fillippo Muccinelli Venieri said the manufacturer offered a rental service for backhoe loaders and wheeled loaders. He said the company expected sales to the rental market to improve compared to last year, "but more because customers are turning to rental assets instead of direct sales. It is a short-term view from the customers," he explained.



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Ammann showcased its ASC70 single drum roller at SMOPYC.

Bobcat and Genie joined local Spanish players to exhibit at the 2014 event.

Speaking to *IRN* during SMOPYC, Bobcat district manager for Spain Carlos Campos was confident that the worst is over for construction equipment sales in Spain and Portugal, and forecast improvements in 2014.

"Last year we hit the bottom in Spain and Portugal, but we started seeing improvements in the last quarter. This has continued in the first quarter of 2014. Last year, we sold 100 machines - that is very low when you consider that in 2007 we sold around 1800 machines."

At SMOPYC, the manufacturer was showcasing the S450 skid steer loader - a 2.2 t machine that has been launched into the Spanish market at the show.

Mr Campos forecast that the construction equipment market in Spain would grow by up to 15% this year as contractors and rental companies



Takeuchi had its TB216 mini excavator on display at SMOPYC - a 1.68 t operating weight machine.

replenished their fleets. He said Bobcat expected to sell up to 130 machines in Spain and Portugal in 2014.

"The market is growing, we are seeing new deals that are also taking less and less time to complete. The end users have better access to finance and need to replace their old machines. Rental companies are also starting to get more active in purchasing new machines. More or less 10% of our sales go to rental and the rest goes to dealers."

AP Aerial Platforms was also cautiously optimistic about prospects for the rental market. The company

is Hinowa's dealer in Spain and also distributes JLG access equipment. A spokesperson said larger rental companies were still struggling to gain back ground in the country, but more opportunities existed for smaller operations.

"Smaller rental companies will find themselves in better position for when Spanish market recovers," the spokesperson said. "The big rental companies still face a lot of debt and rental rates are very low, but the smaller firms that have been more conservative and started with modest fleets are now in a position to start growing."

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# IRC line-up complete

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

**Senior figures from the global rental industry will speak at November's event in Shanghai.**



More than 270 delegates attended the first International Rental Conference, held in Beijing on 14 October, 2013.

## Event details

### WHAT

One-day conference and networking reception

### WHERE

DoubleTree Hilton, Pudong, Shanghai

### WHEN

24 November 2014

One day before Bauma China show

The full-line-up for the 2<sup>nd</sup> International Rental Conference (IRC) in Shanghai on 24 November is now complete, featuring senior representatives from rental companies in China, Australia and Japan as well as global equipment manufacturers.

Leigh Ainsworth, CEO of Coates Hire, will give the morning keynote address on rental management issues and Masaki Kurita, president of Japan's Nikken Corp, will present the afternoon keynote speech looking at trends in Japan's rental sector.

The conference, which takes place the day before the start of the Bauma China exhibition, provides an opportunity to learn about the development of rental in China and wider Asia as well as offering world-class advice on rental management.

China's rental market is represented by three speakers who manage significant rental businesses: Laurence Poh, CEO of Caterpillar dealer Lei Shing Hong Machinery; Li Hua Bin, general manager of Shanghai Jinheyuan Equipment Rental; and Tim Du, founder and managing director of Tianjin Prosperity Bai-Li Engineering & Mechanical.

The conference is organised by *IRN* magazine and KHL Group, and supported by the Machinery Management & Rental Division of the China Construction Industry Association (CCIA). The division's managing director, Jia Li Cai, will provide the welcome address.

More than 270 delegates attended the first International Rental Conference, held in Beijing on 14 October, 2013. **IRN**

## Provisional programme 2014

### MORNING SESSION:

**08:00 - 09:00**

Registration, networking and morning coffee

**09:00 - 09:30**

#### OPENING REMARKS:

Conference Chairman: Murray Pollok

#### WELCOME:

Jia Li Cai, Managing Director, Machinery Management & Rental Division of the China Construction Industry Association (CCIA)

**09:30 - 10:00**

#### MORNING KEYNOTE:

Leigh Ainsworth, CEO, Coates Hire, Australia  
**Setting priorities in rental management**

**10:00 - 10:30**

Ken Lousberg, President, Terex China, China/USA

**An OEM's perspective on China's rental market**

**10:30 - 10:40 Q&A Session**

**10:40 - 11:10 Morning coffee**

**11:10 - 11:40**

Laurence Poh, CEO, Lei Shing Hong Machinery, China  
**Running a dealer rental operation in China**

**11:40 - 12:10**

Bob Carlstedt, Managing Director, Ducker Worldwide, China  
**The challenges of renting equipment in China**

**12:10 - 12:40**

David Phillips, Managing Director, Off-Highway Research, UK  
**Rental and equipment trends in selected S E Asian markets**

**12:40 - 13:00 Q&A Session**

**13:00 - 14:00 Lunch**

### AFTERNOON SESSION:

**14:00 - 14:30**

#### AFTERNOON KEYNOTE:

Masaki Kurita, President, Nikken Corp, Japan  
**Developments in Japan's rental industry**

**14:30 - 15:00**

Chris Sleight, Editor, International Construction, KHL Group, UK  
**Construction equipment manufacturers: Global and Asian trends**

**15:00 - 15:30**

Li Hua Bin, General Manager, Shanghai Jinheyuan Equipment Rental  
**Strategies for rental in China**

**15:30 - 15:35 Q&A Session**

**15:35 - 16:00 Afternoon tea**

### FINAL SESSION:

**16:00 - 16:30**

Zeng Guang'an, Chairman, Guangxi LiuGong Machinery & President, Guangxi LiuGong Group  
**Topic to be confirmed**

**16:30 - 17:30**

#### ROUND-TABLE SESSION

Tim Du, Founder & Managing Director, Tianjin Prosperity Bai-Li Engineering & Mechanical  
Zhijun Wang (Harry), Regional Sales Manager/General Manager, Ritchie Bros Auctioneers, China.  
Tim Whiteman, CEO, IPAF  
**Other panel members to be confirmed.**

**17:30 - 19:00**

**Closing remarks and networking drinks reception**

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# Tackling EU rental industry issues

**The National Associations Committee has decided on a list of EU issues to which it will pay particular attention. ERA reports on progress so far.**



The National Associations committee is chaired by Kevin Minton, director of the UK's Construction Plant-hire Association.

**T**he National Associations committee is composed of the representatives from national rental associations that are members of ERA.

It was created in 2013, as a continuation of the former Norms and Safety Committee, which became the EU Affairs Committee, and of the Association Day. It is chaired by Kevin Minton, director of the UK's Construction Plant-hire Association (CPA).

This Committee is the new platform for the associations to meet and exchange, and also for them to think about how to improve the rental business in general. It focusses notably on safety issues, attracting talents to the industry and all issues relevant to the national associations.

It has also started an important work of updating the list of EU issues and EU organisations of relevance to the rental industry, initially identified by the EU Affairs Committee.

After reviewing an exhaustive list of the EU issues, the Committee has decided to pay particular attention to six. These include replacement engines. This is a very critical issue for the rental companies since it was indicated in February 2014 that the existing 97/68/EC replacement engine derogation would not be continued in the proposed new non-road engine emission regulation.

## Spare parts

This means that previous stage engines could not be produced for repair purposes after the new stage has come into force. It would prevent the manufacture of spare part engines for machines built before the start of a new stage.

Together with CECE, ERA is expressing its concern to the European Institutions. Also, in the UK, the Construction Equipment Association (CEA) has asked CPA to support them on that.

Another issue is the noise of equipment outdoors. The European Community wants to develop a form of labelling to indicate how high the noise emissions are. The ERA would like to introduce red, orange and green colours, like on domestic machinery.

Compliance of equipment is also an issue - some national government bodies have taken some steps to ensure that machines with CE mark actually comply with the machinery directive.

**“The issue of replacement engines is very critical for rental companies.”**

Furthermore, attention is being paid to the cross-border transportation of equipment. At the end of 2014, a draft on this issue should be made available by the EC.

As far as the inspection of work equipment is concerned, ERA has issued a deliverable which is available on its website, at [www.erarental.org/userfiles//ERA-BestPracticesStatementforIn-ServiceInspectionofWorkEquipment.pdf](http://www.erarental.org/userfiles//ERA-BestPracticesStatementforIn-ServiceInspectionofWorkEquipment.pdf).

## Up-to-date document

It is important for ERA to keep this document up-to-date, and also to regularly check the changes in regulations, since this document is used by many companies or national associations.

The ERA has also made a deliverable on the topic of operator licences and training, which can be found at [www.erarental.org/publications/ERA-Annual-Report/European-Rental-Association-Recommended-Framework-for-Training-3\\_17](http://www.erarental.org/publications/ERA-Annual-Report/European-Rental-Association-Recommended-Framework-for-Training-3_17) ESTA is also working on the topic, together with CPA.

Instruction manuals are another issue, and ERA's framework for the production of instruction leaflets can also be found at [www.erarental.org/publications/ERA-Annual-Report/Framework-for-the-Production-of-Instruction-Leaflets-3\\_18](http://www.erarental.org/publications/ERA-Annual-Report/Framework-for-the-Production-of-Instruction-Leaflets-3_18)

Since the production of this deliverable, the Equipment Technology Committee has been making progresses, with the involvement of the manufacturers. The leaflets have three main topics - safety, operations and regular maintenance. It is a priority issue.

Equipment theft is another issue - after a period of inactivity on this topic due to many difficulties progressing on the matter, ERA is starting again some relations with PANIU, the Plant and Agricultural National Intelligence Unit, based in the UK.

ERA has done a lot of work related to equipment theft with this organisation, since PANIU is probably the most advanced organisation in terms of research and data relating to equipment theft in Europe.

All these issues are followed either by the National Associations committee, the Equipment Technology committee or the Sustainability Committee. But ERA is also in touch with various European organisations.

First on the list is the European Commission. ERA is in relation with the DG Markt, the Internal Market and Services Directorate General, and the DG Enterprise, the Directorate-General for Enterprise and Industry.

On the top of that, ERA is also member of three committees at the CEN, European Committee for Standardisation and is a partner of very important associations in Brussels, like CECE, FIEC, and Leaseurope. ■



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# People news

## from the world's rental industry



■ Temporary power provider Aggreko has appointed **Chris Weston** as its new CEO - a position he is expected to take up

next year.

Mr Weston is currently 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.

Aggreko said its interim CEO Angus Cockburn had decided not to apply for the role permanently and would step down later in the year. Aggreko also appointed Carole Cran, currently interim CFO, as CFO and executive director, joining the Board with immediate effect.

■ Rental software provider Wynne Systems has appointed **Rich Wildey** as director of operations.

Mr Wildey joined from Wynne's sister company Trapeze Group - part of the private equity firm that owns Wynne - where he was VP of operations.

Wynne offers software designed to support businesses that rent, sell

and service equipment, from contract and order management through to inventories, maintenance and financials.

The company said Mr Wildey would focus on building a strong team to best serve customer needs, helping to run operations, and managing the implementation team and the overall mechanics of efficient service delivery.

■ Manufacturer Manitou has re-appointed **Dominique Bamas** (pictured) as an independent director of its board, replacing former CEO Joël Goulet who resigned Manitou's interim president. Mr Bamas had been a director of Manitou since 2009 resigning from the position to act as interim president and CEO for nine months in 2013.

The move came as Manitou set out a new strategy that will see the group divided into three new divisions. The new Material Handling and Access division includes the French and Italian production sites for Manitou-branded equipment. That includes telehandlers, rough-terrain and industrial forklifts, truck mounted forklifts as well as aerial work platforms.

Russ Guthery, one of the aerial work platform industry's founders, died of a heart attack on 8 April in his home near Fresno, CA, US. He was 73 years old. Mr Guthery began working in the industry in Southern California with A-1 Machinery, which was a part of the development of Parker Lift. Parker Lift was formed when John Parker joined the company from Selma Lift, which was later Grove Manlift. Parker Lift progressed into Mark Industries.

Mr Guthery moved from there to Weber Products in Fresno, CA, where the Placer telescopic handler and Bandit scissor lifts were produced. He later went to Versalift/Conдор and, lastly, Calavar Scissor Lifts in Waco, TX where he retired from a few years back.



Portrait of Dominique Bamas

The (Compact Equipment) CE division oversees the development and production of skidsteer loaders, track loaders, articulated loaders and Gehl- and Mustang-branded telehandlers.

The Services & Solutions, Service (S&S) division includes service offerings and sales support, including financing, warranty and maintenance contracts, along with fleet management, after-sales, and parts provision and services to end users, including training.



Portrait of John Bennett

■ Trico Lift has added **John Bennett** (pictured), **Joe Macrone** and **Jeff Walker** to its senior management team.

John Bennett joins Trico Lift as its northeast regional sales manager, overseeing rental and sales throughout the company's New Jersey, Pennsylvania and Maryland branches. He has over 20 years of experience in sales, including at Toyota Automotive, Universal Supply Co. and LoJack.

Mr Macrone joined Trico Lift as the director of human resources. He has over 20 years of experience in human resources management, having spent most of his career as the senior HR manager with Mars, Inc.

Mr Walker is Trico Lift's new safety manager. He joined Trico Lift from Nooter Construction Company, where he was senior field safety co-ordinator.

"The hiring of these key senior managers is a continuation of the constant improvement that is integral to our company today," said president and CEO Chris Carmolingo.

■ Ramirent has announced that its Denmark country manager **Erik Høi** is to leave the company "by mutual agreement". Mr Høi, who joined Ramirent in 2004 through

the acquisition of Altima, was senior vice president of Ramirent Denmark and a member of Ramirent's group management team. He will work in an advisory role until 31 May at the latest.

Ramirent is now looking for a successor, with **Johan Eckerby**, currently Ramirent's business controller, appointed interim managing director for the Danish subsidiary from 14 April, 2014. Mr Eckerby will report to Erik Alteryd, executive vice president of Ramirent Sweden.

Magnus Rosén, Ramirent's president and CEO, thanked Mr Høi for his contribution to the development of the company; "I highly appreciate the value that Erik has brought to our Danish business and I wish him all the best for the future".

■ **Kevin Appleton** has returned to the powered access rental industry as chairman and director of Horizon Platforms, the Wakefield, UK-based rental business. At the same time he takes up a new position as managing director of the UK subsidiary of Yusen Logistics, the Japan-based freight forwarding and contract logistics business. Yusen employs more than 13000 people in 37 countries.

Mr Appleton, who is also a non-executive board member of Ramirent and columnist for *IRN* magazine, was chief executive of Lavendon Group between 2002 and 2011 and more recently divisional chairman at Travis Perkins Builders Merchants.

Horizon's managing director, Ben Hirst, said, We are delighted to have Kevin join the board team and look forward greatly to benefiting from his experience of the industry."

Meanwhile, his appointment at Yusen - he took up the post on 14 April - sees Mr Appleton return to the logistics sector in which he first began his business career. He first worked with the UK's Royal Mail and then afterwards spent several years with the NFC before leaving to join Caliber Logistics. **IRN**

## Showman's Show looking strong

The Showman's Show for the outdoor and special event industry takes place from 22 to 23 October at Newbury Showground, Berkshire, UK and organiser Lance Show & Publications is feeling positive about the exhibition's 29<sup>th</sup> outing. It said the event was expected to attract more than 340 exhibitors to an anticipated audience of 4500 event professionals.

First-time exhibitors at the 2014 Show include luxury portable toilet providers, Loos for Do's; German specialists in coated fabrics and technical textiles, Mehler Technologies; importer of yarns and fabrics, Premier Textiles; and Loowatt, which will display its energy-generating waterless toilet system. Show organiser Jeremy Lance said, "This early in the season, we are extremely encouraged by the response from exhibitors."



Aerial view of the Showman's Show.

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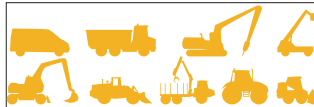
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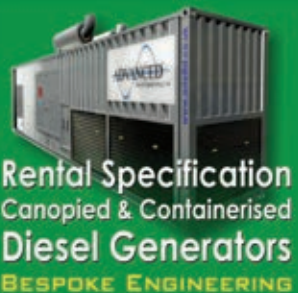
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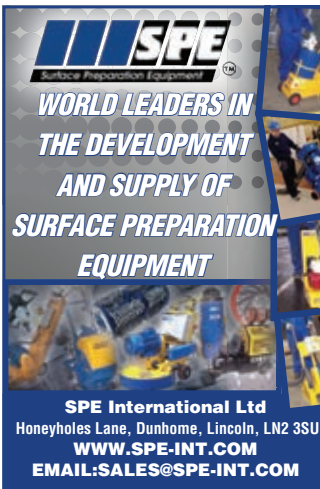
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# Bigger, Stronger, Lighter



## TP 175 MOBILE

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Bigger, Stronger and Lighter. TP 175 MOBILE from Linddana sets new performance standards for machines weighing less than 750 kg and which only require an ordinary driving licence. Hydraulic in-feed and chipping of wood up to 17.5 cm in diameter – this makes it best in class of towed wood chippers



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Linddana provides a 3-year warranty on all TP Landscape Wood Chippers, one of the first wood chipper manufacturers to offer this on a global scale.

Linddana has successfully designed, manufactured and marketed TP Wood Chippers since 1980. Today, the Danish-owned company is a market leader with an impressive range of reliable machines. TP Wood Chippers embody user-friendliness, robust design and high efficiency. Dedicated development teams ensure that our machines live up to the highest safety standards required from modern landscaping and biomass production.

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