



EUROPEAN  
RENTAL  
ASSOCIATION

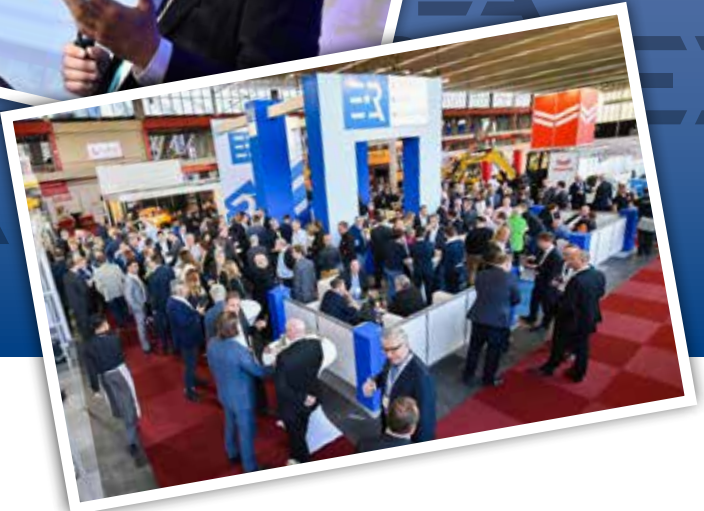
# Annual Report 2019

[WWW.ERARENTAL.ORG](http://WWW.ERARENTAL.ORG)

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Save the date for the next  
ERA Convention in Maastricht  
10 – 11 June 2020



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RENTAL  
ASSOCIATION



Dear Colleagues,

Sharing Economy is a buzzword and defining it is challenging, particularly considering how widespread the term's usage is. Sharing models are often associated with start-ups but also with massive dominating monopolies like Airbnb and Uber. Sharing models contribute to the circular economy: they can play a role in extending the amount of time a product is in use and maximising its utilisation.

At ERA, we believe that the rental business is at the origin of the Sharing Economy, since it is based on sharing equipment, but that some major differences exist with the players of the so-called Sharing Economy today. To complete our reflections and discuss the topic with more experts, we decided to make Rental and the Sharing Economy the topic of the last Convention.

We also decided to present the progress of the research on the Carbon Footprint of Construction Equipment. Meanwhile, the report has been published and is available on the ERA website. It concludes that renting equipment reduces carbon emissions: by sharing equipment and engaging in asset management, the rental industry contributes to reducing carbon emissions.

Also, during the Convention, the new ERA Board was elected. The new team will build on the previous work and make sure that the necessary steps to reach the goals identified for the coming years are in place. I take this opportunity to thank the outgoing Board members for their dedication during the last 3 years. I also want to thank the committee members for the time and energy they invest in ERA and the rental associations - the national associations and IPAF. It is our goal and priority to intensify our collaboration with them.

In 2020, we will be back to the Netherlands, to Maastricht this time, where the IRE, APEX, the ERA Convention and the European Rental Awards Ceremony will take place. I am looking forward to it and it will be a pleasure to meet you there!

Yours faithfully,

Pierre Boels

ERA President

# ABOUT ERA

The key mission of ERA is to promote the rental concept in order to facilitate the continued growth of a sustainable and professional rental industry in Europe.

To achieve this goal, ERA acts as the representative association of the equipment rental sector at European level, complementing the activities undertaken by national rental associations locally.

Our work focuses on 7 main areas:

- Promotion of the rental concept
- Sustainability
- Statistics on the European rental market
- Technical issues and equipment
- Harmonisation of national regulations
- Awareness of the challenges of the Future
- Support to rental associations



## ERA BOARD

- > Manages the Association
- > Gathers seven representative members covering various trades and countries
- > Is elected by the General Assembly (Chair elected by the Board)

The Board is composed of:

Pierre Boels / President  
 Xavier du Boÿs / Vice President  
 Pierre-Nicola Fovini / Vice President  
 Leif Gustafsson / Vice President  
 Stephane Henon / Vice President  
 Juergen Kuespert / Vice President  
 Armin Rappen / Vice President

## ERA SECRETARIAT

- > Supports the Association's daily activities
- > Supports the work of the Association's Committees and Future Group
- > Represents ERA in Europe and globally.
- > Carries out the Association's communication activities
- > Organises ERA's events

The ERA Secretariat is composed of:

Michel Petitjean / Secretary General  
 Hans Craen / Supervisor  
 Carole Bachmann / Manager  
 Tomas Babicky / Public Affairs Manager  
 Veerle Guns / Assistant  
 Benedicte Lambert / Assistant (ERA Convention)

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# MARKET OUTLOOK: TRENDS AND EVENTS IMPACTING THE RENTAL INDUSTRY

## Flashback to the events in the rental industry in the second half of 2018

**United Rentals** reached an agreement to acquire BlueLine Rental, The Woodlands, Texas, for \$2.1 billion from Platinum Equity, Los Angeles, which had purchased Volvo Rents from the Volvo Group in early 2014 for \$1.1 billion. BlueLine Rental has 114 locations and 1,700 employees. The acquisition of BlueLine follows a string of major acquisitions by United Rentals over the previous 18 months, including BakerCorp for \$715 million in July, the assets of Industrial Rental Services in March, the completion of the acquisition of Neff Corp. for \$1.3 billion in October 2017, the purchase of portable power assets from Cummins in August 2017 and the completion of the acquisition of NES Rentals for \$965 million in April 2017.

**Cramo** confirmed the acquisition of Sweden-based Nordic Modular Group (NMG) for SEK2.725 billion (€263 million) and said the acquisition of NMG strengthened its modular division and gave it more latitude to explore alternatives.

**Boels** expanded in the UK with Artisan Hire Centre and its sister company SAS, adding nine more

depots, bringing its presence in the UK to 38 depots. Boels entered the UK in 2017 through the acquisition of Supply UK, with 25 depots, before purchasing Already Hire, with 4 depots.

## Pursuit of consolidation in the rental industry in the first half of 2019

**Mills and Solaris**, in Brazil, confirmed a binding agreement to merge, following an announcement in late September. The merger of the two will create the largest rental business in Brazil, combining Mills' €73 million business with the €56 million Solaris operations. It will also create one of the world's top 25 aerial platform businesses with a combined fleet of around 8,400 units (5,700 units from Mills added to 2,700 units from Solaris).

In April, Gestora De Activos Y Maquinaria Industrial (GAMI), an investment vehicle led by Spanish businessman Riberas, bought 54.56% of **GAM** for EUR 17.7 million.

**HSS** completed the sale of UK Platforms to Nationwide Platforms, a subsidiary of the Loxam Group, for £60.5 million. The sale was first announced in July 2018.



## RENTAL INDUSTRY TRENDS

**Speedy** has acquired powered access specialist Lifterz, based in Yorkshire, UK. Operating from a head office in Ossett, Lifterz has three additional sites and a fleet of approximately 1,300 access platforms. Speedy said the acquisition complemented its previous powered access acquisitions, giving it a national presence in access equipment.

**Germans Homs** has bought Girona-based Llogater, which specialises in the rental of equipment for events. The company will create a division specialising in the rental of machinery and generators for events.

**Ramirent** is to acquire the site accommodation rental business of Rocla Solutions Oy, one of Finland's largest manufacturers and distributors of industrial forklift trucks. The deal includes its module fleet and existing rental contracts.

**Mateco Spain** has announced the acquisition of rental company Afron after buying 100% of the shares in its parent company Afron Capital. The company has a fleet of 1,000 units and, in addition to Spain, rents platforms in Chile and Panama.

**Hitachi** has invested in UK-based rental firm Synergy Hire. Synergy Hire, based in Letchworth, will offer self-drive rental of Hitachi excavators and breakers. Although Synergy is not being marketed as part of Hitachi's Premium Rental initiative in Europe, it can be viewed as a UK-specific variant of the manufacturer's push into rental.

The partial demerger of Cramo's modular space business, announced towards the end of 2018, was

completed with trading in Adapteo shares beginning on July 1. Following the demerger, Adapteo and its subsidiaries now form a new independent group of companies separate from Cramo.

**Kiloutou** has acquired German company M+S Arbeitsbühnen, which specialises in the rental of powered access equipment. The deal comes after the acquisition of Starlift in 2016, Butsch-Meier in May 2018 and GL Verleih NRW in July 2018 and strengthens the presence of Kiloutou in Germany.

**Loxam** has made an offer to acquire Ramirent for €970 million. The combined company would be the largest rental business in Europe with joint revenues of €2.3 billion and activities in 22 European countries, as well as the Middle East, Brazil, Colombia and Morocco. The total number of depots will amount to 1,060 and the number of people to 10,900.

**In the meantime, development continues among equipment manufacturers, particularly companies from Asian countries.**

**LGMG**, a Chinese aerial platform manufacturer, has opened its first European facility in Rotterdam, Netherlands.

**Sinoboom**, another Chinese aerial platform manufacturer, has established Sinoboom Europe/Liftstore, in Jawczyce, Poland.

**Zoomlion**, the Chinese construction equipment manufacturer, has entered the powered access market with a new range of telescopic and articulated

## RENTAL INDUSTRY TRENDS

booms and scissor lifts. Zoomlion is the third largest manufacturer of construction equipment in China and one of the top 15 in the world.

**Terex** has sold Demag to Tadano. Terex Corporation has agreed to sell its Demag mobile cranes business to Tadano for approximately US\$215 million. The deal covers all terrain cranes and large crawler cranes and includes the factory in Zweibrücken, Germany, as well as eight subsidiaries of Terex including sales and service locations.

US-based **Toro company** is set to acquire The Charles Machine Works – owner of Ditch Witch – for US\$700 million. Charles Machine Works makes underground utility construction equipment, including horizontal directional drills, walk and ride trenchers, utility loaders and vacuum excavators.

**JCB** is to invest £65 million in building a new factory in India. Located near the port city of Surat in the state of Gujarat on the West Coast, it will be the equipment manufacturer's sixth factory in India – which has been JCB's biggest single market since 2007.

**Yanmar**, the Japanese manufacturer, is to acquire US-based compact tracked and wheeled skid steer loader producer ASV for US\$70.7 million. The combination of ASV's products with Yanmar's compact equipment portfolio will create a comprehensive and global provider of compact equipment with almost no overlap in distribution networks.





# ERA ACHIEVEMENTS 2019

ERA, the European Rental Association, was created in 2006 to:

- **promote the rental concept,**
- **collate statistical data,**
- **advocate at European level,**
- **set up tools to meet business challenges.**

13 years later, ERA has become the Voice of the Equipment Rental Industry in Europe.

ERA is an open association, governed ethically, and an easy platform for promoting new ideas.

**E**RA continued to defend the rental industry in 2019 through contacts with other European associations and the European authorities, as well as the publication of guidance on topics of interest for the rental business, which can be freely used by rental companies and associations.

ERA acts as the representative association of the equipment rental sector at European level, complementing the activities undertaken by national rental associations locally. ERA is also helping foster the development of new rental associations, with the emergence of associations in new markets.

ERA is one of the 8 members of the Global Rental Alliance, a partnership of rental associations whose aim is to increase the profile of equipment rental worldwide and to build global understanding of the industry.

On the following pages, you will find a detailed account of the activities of ERA's committees.

## The work of the Association focuses on the following areas:

- **Promotion** of the rental concept as a solution for cost saving and sustainability / circularity concerns
- **Technical issues and equipment**, working with manufacturers and solution providers in the Technical Committee
- **Statistics**, prepared in association with IHS Markit
- **Sustainability and circularity**
- **Future challenges** of the rental business
- **Harmonisation** of national regulations
- **Support** to rental associations

# PROMOTION COMMITTEE

## COMMITTEE CHAIR:

**Pierre-Yves RALLET, Loxam**

*Number of committee members: 22*



*The role of ERA's Promotion Committee is to raise awareness, advocate for and popularise the concept of rental in Europe. Here are the main topics the Committee worked on in 2019.*

## Era's New Mission Statement

The key mission of ERA is to promote the rental concept in order to facilitate the continued growth of a sustainable and professional rental industry in Europe.

## Communication

- **Media campaigns** (in 6 languages) to inform the rental community and spread the benefits of rental in 2019 include:

- A new Sustainability Award at the ERA Convention
- A new and updated TCO Calculator
- The 'Carbon Footprint of Construction Equipment Report'

## • ERA website and social media

- ERA's website, [www.erarental.org](http://www.erarental.org), is mobile responsive, multilingual and the primary tool for ERA communications. It receives between 1,500 and 3,000 visitors per month.

- Social media: ERA is active on Twitter (780 followers) and on LinkedIn (owner of the Construction Equipment Rental – Europe Group)

- **Next steps: move to video and active content management**

## • Upgrade of the ERA TCO Calculator, <https://equipmentcalculator.org>:

- First version of the website was launched in 2016
- 6 languages (English, German, French, Dutch, Spanish, Italian)
- Updated version launched in March 2019:
  - Operating lease and finance lease options
  - New user experience
- Around 300 visitors per month and more than 1,200 registered users

- **Next steps: explore the possibility to allow ERA members to include the TCO Calculator on their own websites**

## • Review of ERA's Communication Strategy

# STATISTICS COMMITTEE

## COMMITTEE CHAIR:

**Michel PETITJEAN, ERA**

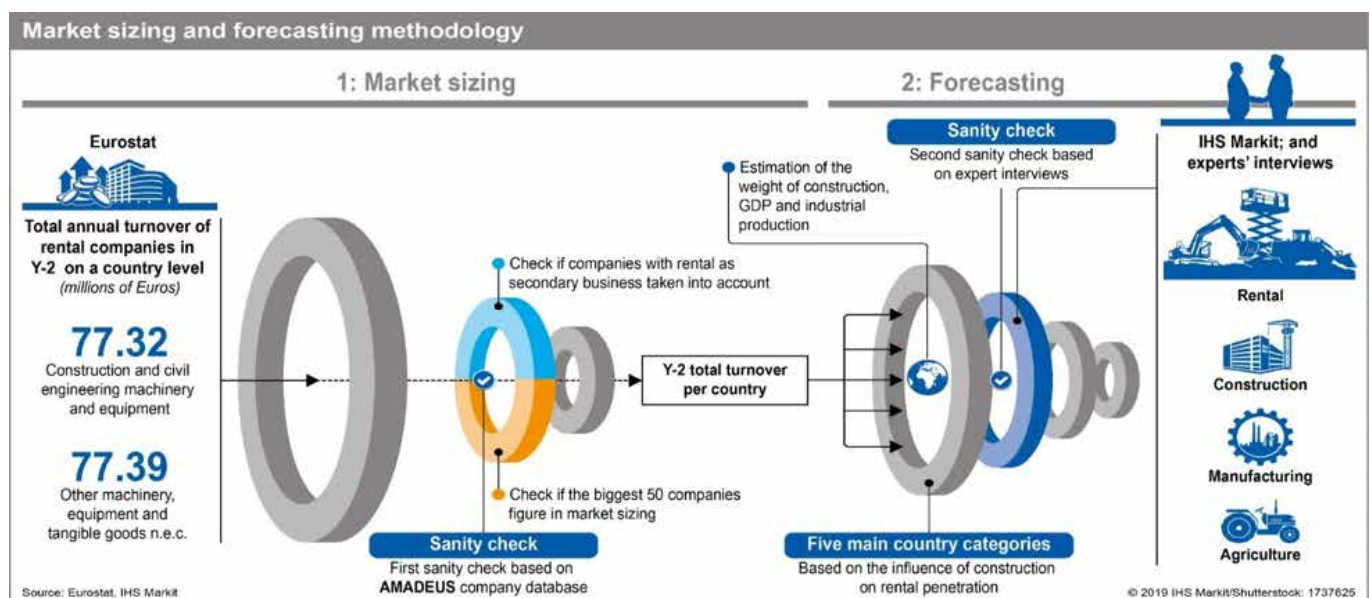
*Number of committee members: 16*



One of the main objectives of ERA is to produce European-level market data on equipment rental markets using consistent definitions and methodology across countries.

The ERA Statistics Committee partners with IHS Markit - the same research company used by ARA to produce well-established market standard data in the USA.

Commissioning market research does not simply mean handing the task over to a market research partner. The committee is closely involved in issues of scope, definition, methodology and format of outputs at every step of the way with the research company, as shown by the chart below:





# SUSTAINABILITY COMMITTEE

## COMMITTEE CHAIR:

### To be nominated

*Number of committee members: 14*

*ERA's Committee on Sustainability aims to promote the environmental benefits of rental as well as develop tools to help members to respond to the challenges of corporate social responsibility and to align sustainability practices in the industry.*

The rental business is inherently sustainable, since it uses the 5 following principles of the circular economy: shared usage, reparability, resource use, reusability and recyclability.

However, the sustainability of the rental business needs to be promoted towards customers, public authorities, and in the rental industry itself.

Here are the main topics the Committee has been involved in over the last months.

## Project "Carbon Footprint of Construction Equipment"

### • Phase 1:

- Carbon Life Cycle Assessment, ISO 14040 & 14044 LCA standard

### • Phase 2:

- Definition of parameters
- Comparative analysis of parameters

effects on selected products

- Use case scenarios and calculator

## EU Rental Advocacy Activities

- Participation in the discussions around the Circular and Sharing Economies
- Continuous promotion of the equipment rental business showing that it contributes to the transition to a Circular Economy

## Sustainability Award

- Judged by the ERA Sustainability Committee (not by the Awards' judges),

## Sustainability online brochure,

<http://sustainability.erarental.org>:

- Updated with new best practices of this dynamic set of best practices in the rental business, categorised according to their role in the supply chain

## Future projects

- Communication of the conclusions of the report 'Carbon Footprint of Construction Equipment':
  - To the stakeholders of the rental business (rental companies, customers, OEMs, etc.)
  - To the European and the national authorities.
- Update of the sustainability online brochure,
- Sustainable suppliers appraisal framework

# TECHNICAL COMMITTEE

## COMMITTEE CHAIR:

**Martin SEBESTYEN, Zeppelin Rental**

*Number of committee members: 52*



**The mission statement of ERA's Technical Committee** is "Making it safer, easier, cost effective and sustainable for the rental industry by working together with equipment stakeholders on:

1. The key drivers of the total cost of ownership (damages, accidents, maintenance, parts management, PDIs, etc.)
2. Standardization and alignment wherever possible (data, decals, tie down points, instruction manuals, etc.)
3. Framework of training (skill level, e-learning, etc.)
4. Impact of new legislation on the rental industry
5. Telematics (connectivity, IoT, etc.)."

The topics that the Committee has been working on over the last months are the following:

### Telematics standards

- Survey to rental companies and OEMs to better assess their needs and expectations
- Workshop with rental companies and OEMs
- Preparation of a list detailing what rental companies want to achieve using telematics
- Face-to-face meetings focusing only on Telematics

### Pre-delivery inspection (PDI)

- ERA recommendation to OEMs on the improvement of the quality of PDIs

### Rental Trainings

- Definition of 4 levels of trainings
- Support document to OEMs describing an example of standard check-in procedure in a rental branch

### Face-to-face meetings

- Increase in the quality of meetings on both sides
- Positive results on the Technical Committee's work

### Next topics for the Committee

- Telematics
- Technical training and education
- Quality of PDI / PDI issues
- BIM (Building Information Modelling)
- PIM (Product Information Management)

# NATIONAL ASSOCIATIONS COMMITTEE

## COMMITTEE CHAIR:

**Jose BLANCO, ASEAMAC**

*Number of committee members: 14 National Associations and IPAF*



*This Committee was created to be the platform for the associations to meet and exchange and where they can brainstorm with their European peers about how to improve the rental business in general.*

At its strategy review meeting in 2018, the Board decided that ERA should be of greater significance to smaller rental companies by intensifying collaboration with the National Rental Associations. Out of the 5 goals identified for the next 5 years for ERA, one

goal relates to the collaboration of ERA with the rental associations. This has since then been one of ERA's main priorities, the ultimate goal being to increase the value of renting for the customers of the equipment rental industry.

Once a year, the National Associations Committee meets in Brussels and have the opportunity to review in detail the work of the other ERA committees and to exchange information about topics of interest for their members.

ERA keeps in close contact with the European institutions. First on the list is the European Commission. In particular, ERA is involved in the discussions about Sustainability, Circular Economy, Green Public Procurement and the digitalisation of Construction.

ERA collaborates with critical stakeholder associations in Brussels like CECE, FIEC and Leaseurope.







# DATA ON EUROPEAN EQUIPMENT RENTAL MARKETS

## THE KEY RESULTS OF THE STUDY FOR THE YEAR 2017 CAN BE SUMMARISED AS:

- In the EU-28 and EFTA countries, equipment rental companies and other companies providing rental services generated a total rental turnover of more than €25.7 billion.
- The rental industry in the 15 countries under investigation accounted for more than 95% of the total rental turnover in the EU-28 and EFTA, with the three main markets – the United Kingdom, Germany, and France – accounting for 60% of the total.
- In the 15 countries studied, the equipment rental industry saw year-on-year (y/y) growth of 4.4%.

Based on the 2015 statistics, and for the 15 countries covered under the study, the structure of the

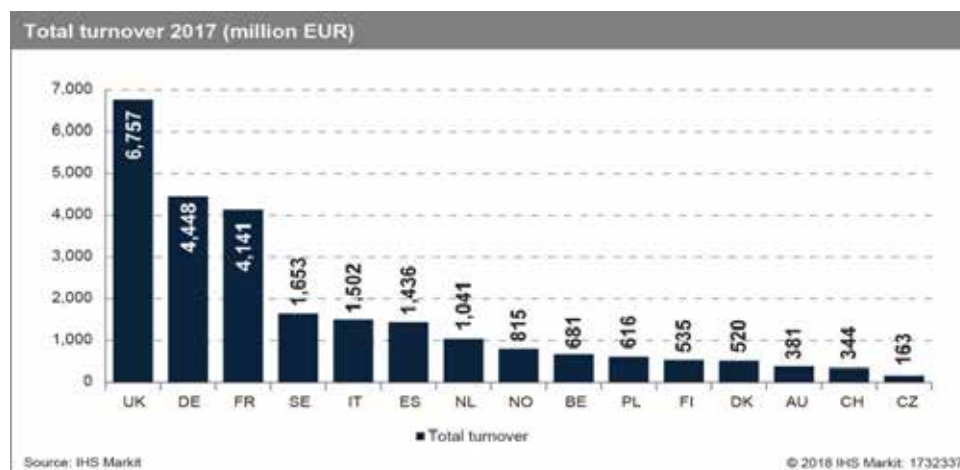
European equipment rental industry (without operators) is as follows:

- Number of rental companies (without operators): 17,100
- Number of employed persons in rental companies (without operators): 140,000

## EQUIPMENT RENTAL MARKET SIZE BY COUNTRY

In terms of market size, the three main markets in 2017 were the UK, Germany, and France.

These three countries accounted for almost 65% of the rental turnover of the 15 European countries detailed in the report, and more than 60% of rental turnover in the EU-28 and EFTA.



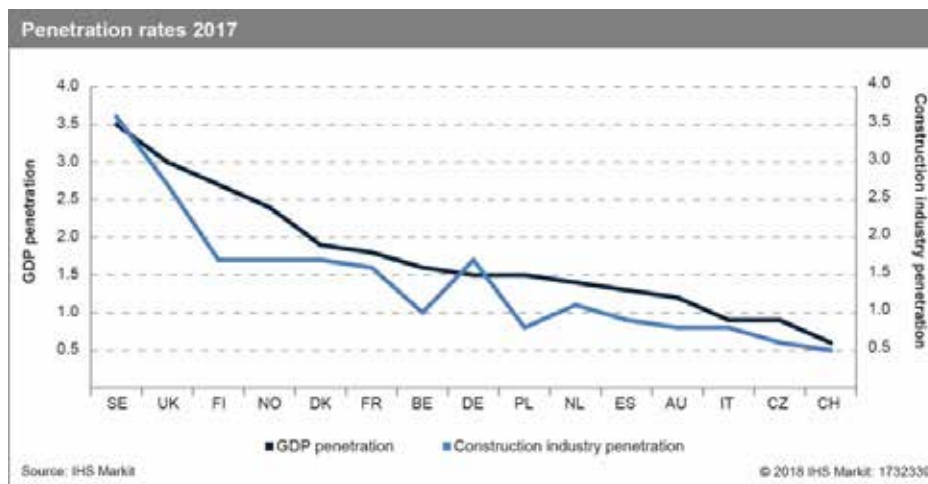
## DATA ON EUROPEAN EQUIPMENT RENTAL MARKETS

### PENETRATION RATES:

Regarding equipment rental penetration in 2017, two different metrics for the 15 countries covered were monitored:

- The average construction industry penetration rate was 1.5%.
- The average GDP penetration rate was 1.8‰.

Looking at the two concepts of construction industry penetration and GDP penetration, and at the differences in penetration intensity between countries, suggests there is still room for the European rental market to grow ahead of the economy.



### INVESTMENTS AND RENTAL FLEET SIZE:

In 2017, the rental industry in the 15 countries studied increased investment in rental equipment by 1.7% compared with 2016.

According to the annual economic report from the Committee for European Construction Equipment, sales of construction equipment in Europe grew 15% in 2017, and in the first months of this year, sales continued to grow. In fact, most parts of Western Europe, including the Nordic countries, the United Kingdom, Germany, Benelux, Austria and Switzerland are at, or close to, record levels.

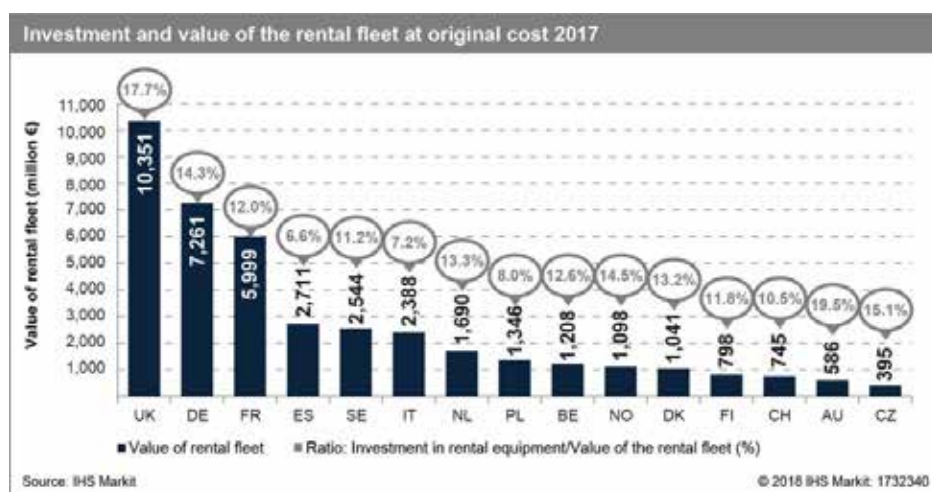




## DATA ON EUROPEAN EQUIPMENT RENTAL MARKETS

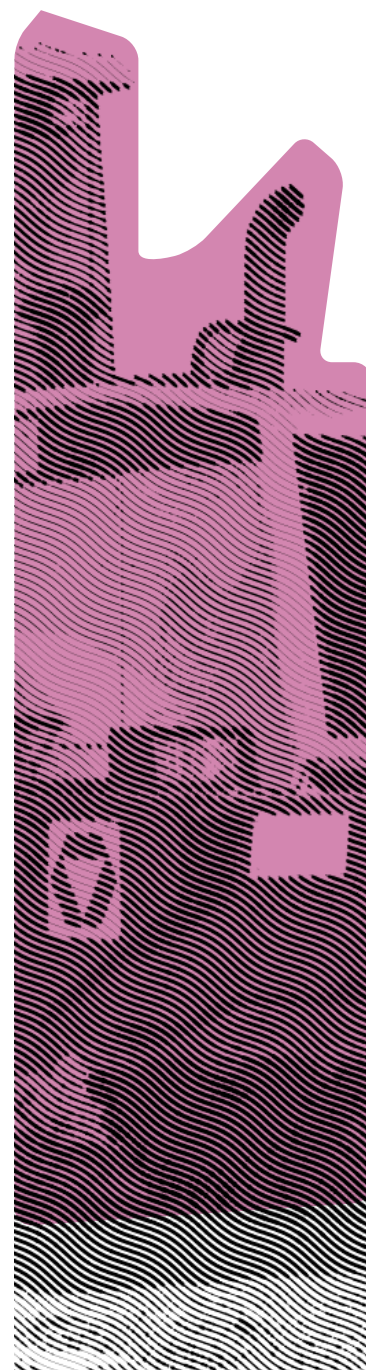
Among the main reasons for this are improved levels of investment by rental companies. Overall demand from the rental sector was vibrant in 2017, with many companies renewing or expanding their fleets. As a result, the rental share of many equipment sales in Europe expanded further, as can be viewed in the special report included in the [2018 ERA Market Report](#).

### GLOBAL RENTAL ALLIANCE COUNTRIES REPRESENT NEARLY US\$100 BILLION IN RENTAL REVENUES



The Global Rental Alliance (GRA) held its 16th annual meeting at The ARA Show® 2019 in Anaheim, CA. At the meeting, GRA welcomed the Brazilian Rental Association (ANALOC), the Canadian Rental Association (CRA), the European Rental Association (ERA), Hire Association Europe (HAE) from the UK, the Hire Industry Association of New Zealand (HIANZ), the Hire and Rental Industry Association Ltd. (HRIA) from Australia, the Japan Construction Rental Association (JCRA) and the American Rental Association (ARA).

“The Global Rental Alliance allows industry and association representatives from around the world to discuss common issues that impact rental / hire operators and share solutions that are having a positive impact,” said Tony Conant, ARA CEO. “We are always looking to add global members who are interested in sharing their geography’s industry data and advancing the rental industry.”



# ERA CONVENTION 2019

## THE 14TH ERA CONVENTION TOOK PLACE IN MADRID ON 15 AND 16 MAY 2019

The theme of the Convention was '**Rental – A Sharing Economy**' to showcase how the rental industry is at the very heart of the sharing and circular economies. Other topics of interest to the rental business were addressed, as you will read in the following pages.

In addition, the 2019 ERA Convention hosted an exhibition of selected suppliers to the rental industry and the European Rental Awards Dinner took place at the same venue.

To underline the sustainability theme of the event, this year's ERA Convention was completely paperless, giving the participants a chance to interact through a mobile app, in place of a paper brochure, with all the information about the Convention.



# PLENARY SESSION \*



## **James George, Ellen MacArthur Foundation - Circular Economy: the Business Agenda**

James George is responsible for engaging with new business members looking to be part of the Foundation's network across the globe. By understanding how an organisation's strategy on the circular economy, aligns with the Foundation and its partners, James is able to work closely with other project leads and provide context to the business community on how they can engage effectively with the Ellen MacArthur Foundation.

In his presentation, James introduced the concept of the circular economy and its principles (1- designing out waste and pollution, 2- keeping products and materials in use, and 3- regenerating natural systems) and offered a vision for growth within the circular economy that creates new opportunities.



## **Martijn in 't Veld and Leonardo Verkooijen, Climate Neutral Group, Marijn Bijleveld, CE Delft - Carbon Footprint of Construction Equipment**

Martijn in 't Veld works at Climate Neutral Group as Carbon Strategy Advisor and Programme Manager Energy, Leonardo Verkooijen is a Carbon Footprint Specialist at Climate Neutral Group and Marijn Bijleveld works as Senior Researcher / Consultant at CE Delft. CE Delft is dedicated to providing aid to companies, sector organisations, governments and NGOs with environmental information to make well-informed policy decisions.

The 3 researchers presented a progress report on a study commissioned by ERA. The research focused on calculations of the CO<sub>2</sub> emissions during the full life-cycle of ten pieces of equipment, representative of the portfolio of ERA members. The research concluded that efficient use lowers the total carbon footprint of the pieces of equipment and that the rental business model stimulates efficient use. Depending on specific user practice, the research estimates that this can lead to significant reductions in emissions, in the range of 30% to more than 50%.

\* All the presentations are available on the ERA website, <https://erarental.org/en/events/convention/era-convention-2019>



## PLENARY SESSION \*



### **Marieke Blom - Sharing and Economy**

Marieke Blom is the Chief Economist of ING in the Netherlands. The research team in Amsterdam covers a broad range of themes, from monetary policy and trade to specific industries, sustainability and technology. Marieke is a member of ING's global leadership council and member of the board of the Dutch Royal Economic Society (KVS).

In her presentation, Marieke talked about the links between economics, circularity and sustainability. She focused on defining the characteristics of circular business models and outlining the obstacles to achieving them. She offered insight into the behaviour of customers, companies' expectations of the circular economy and the opportunities it can bring.



### **Pietro Sibille, Todor Todorovski, Garrison Taylor - Investor Perspectives on the Rental Industry**

Pietro Sibille, Todor Todorovski and Garrison Taylor are analysts from Credit Agricole CIB.

They gave a presentation on the current perceptions of the rental sector among investors and presented an overview of macroeconomic trends in both the US and European rental sectors.

\* All the presentations are available on the ERA website, <https://erarental.org/en/events/convention/era-convention-2019>

## Trends in the European Rental Industry -

### Michel Petitjean

Michel Petitjean, Secretary General of ERA, presented the trends in the European Rental Industry. After commenting on the macroeconomic trends in construction and rental markets in Europe, Michel delivered the highlights of the 2018 ERA Market Report, focusing on 15 European countries' rental markets and on the UK in particular. He presented the forecasts for 2019-2020, comparing rental growth to developments in construction and to GDP growth.



## GUEST SPEAKER \*

### Jessica Regan

Jessica is an entrepreneur, international public speaker and futurist on technology and sustainable business. For 12 years, Jessica consulted for Fortune 500 corporations, startups and governments, including the United Nations, in areas of community economic development and sustainability. A recipient of the Clean50 award, Jessica concentrates on developing highly scalable startups, using business as a vehicle for social change, including her own: Social Impact Technology Accelerator (SITA) and Mesh Exchange, a software firm using technology to power the circular economy. She holds a Master's Degree in Political Science and is based in Vancouver, Canada.

In her speech, she spoke about how the transition to a circular economy, when complemented by digitalisation, will lead to the creation of additional value, new business models, innovation and new opportunities.



\* All the presentations are available on the ERA website, <https://erarental.org/en/events/convention/era-convention-2019>

# WORKSHOPS \*

Previous ERA Conventions showed that workshops are an effective way for participants to engage in debates on specific topics and to achieve a more interactive participation of the attendees and collect useful feedback from the audience.

There were two sessions of workshops of the Promotion Committee, Sustainability Committee, Technical Committee and Future Group, so that participants could attend two different workshops.

The outputs of the workshops will be analysed by the 3 Committees and the Future Group and will feed into ERA's upcoming work. Summaries of the workshops are available on the ERA website.

## PROMOTION – Is Rental more than Sharing?

After Pierre-Yves Rallet, Chairman of the Promotion Committee, presented the works of the Committee over the last year, Omar Achment, a social entrepreneur and the founder of Overstory.eco, a London based start-up focusing on Industry 4.0 and sustainable business models, gave a presentation on "Industry 4.0 and Rental" and his vision of the "Depot of the Future".

A debate around 2 questions, related to the topic of the Convention, followed:

- How is rental part of sharing economy?
- How will industry 4.0 change the rental industry?

To the first question, a consensus was reached around the idea that rental can be seen as the inventor of the sharing economy since the whole business model is based on sharing equipment between several customers.

To answer the second question, the participants differentiated the 4 areas of Industry 4.0: strategy, technology, talent, social / environment.



\* All the presentations are available on the ERA website, <https://erarental.org/en/events/convention/era-convention-2019>

## WORKSHOPS \*

### TECHNICAL & EQUIPMENT — Is rental more than sharing in terms of asset management?

Martin Sebestyen, Chairman of the Technical Committee, presented the works of the Committee over the last year and gave the floor to Gian Luca Benci, from the company Aliaszk.com, who introduced the new version of the ERA TCO Calculator. The ERA TCO Calculator now includes, in addition to purchase and rental, the operating lease and financial lease options. The user interface has also been changed and is now more dynamic and user friendly.

Following those presentations, the attendees debated 2 questions, related to the topic of the Convention:

- In terms of equipment, what makes a rental company different from a rental platform?
- In terms of equipment, what makes a rental company unique among the Sharing Economy players as partners of OEMs?



### SUSTAINABILITY – Carbon footprint of construction equipment

This workshop developed further the topic of the plenary presentation on the research on the carbon footprint of construction equipment.

The participants discussed, amongst other things, the parameters defining the environmental impact of the use of construction equipment:

- Cases of inefficient use and how they can be defined,
- The type of parameters: completeness and wishes / tips for additional parameters,
- The range of figures on normal, efficient use for each parameter,
- The purpose and parameters of a calculator to determine the carbon footprint of the use of construction equipment, and its possible use in practice.

The following parameters, which have the strongest influence on the carbon footprint of equipment, were discussed:

1. Intensity of use - maximising the utilisation rate could reduce the amount of equipment required
2. Using the right equipment for the job
3. Transportation - shorter distances and higher load factors
4. Maintenance - allowing extended lifetime

\* All the presentations are available on the ERA website, <https://erarental.org/en/events/convention/era-convention-2019>



## WORKSHOPS \*

### FUTURE GROUP – Rental Branch of the Future

Under the topic of The Rental Branch of the Future, 8 pre-selected phenomena were discussed at the workshop:

- Platform Economy
- AI Robotics
- Personalised Pricing
- Leased Standard of Living
- Big Data
- Augmented Reality
- Circular Economy
- Industry Disruptors

The topics were selected from a list of trends that were identified by the ERA Future Group as relevant for the rental branch of the future by using the Futures Platform tool.

Answering questions on how each trend could be disruptive for the rental branch of the future and when, the following results of voting on the 8 phenomena were displayed on the Futures Platform matrix:



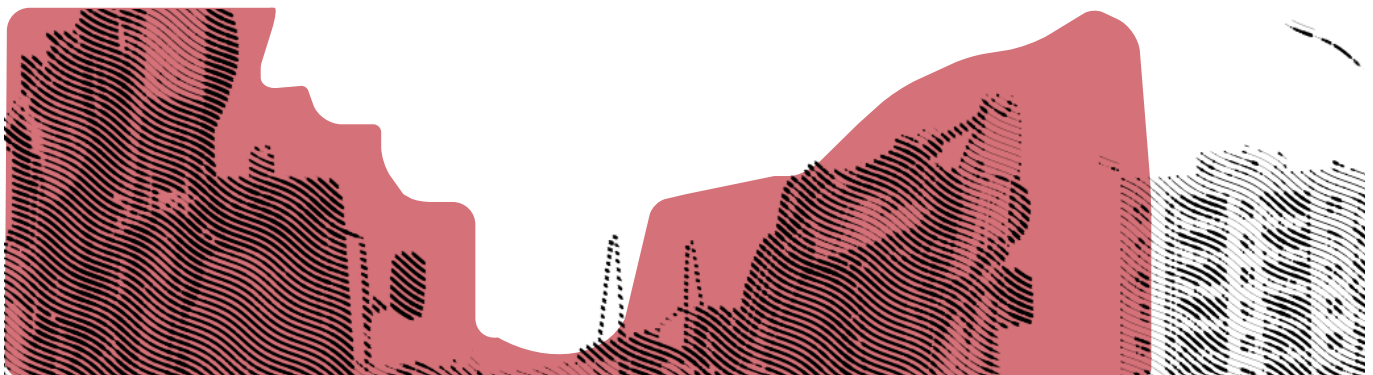
**Fig. 2** Green dots – strengthening phenomena

Red dots – wild cards (low chance of happening but with potential high impact)

Blue dots – weakening phenomena

The participants also identified other topics that could be relevant for the future of rental.

These topics include: BIM, Autonomous machines / robotics, new source of energy / electric engines, Internet of things / data, virtual / unattended rental in cities.



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# EUROPEAN RENTAL AWARDS

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**LARGE RENTAL COMPANY OF THE YEAR (turnover over €15 million)**

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**WINNER >> Bredenoord (Netherlands)**



Bredenoord is to be congratulated not only for its continuing growth, but for leading the way in developing innovative battery-powered rental solutions.



## SMALL AND MEDIUM RENTAL COMPANY OF THE YEAR (turnover under €15 million)

**WINNER** >> **Germans Homs (Spain)**



Germans Homs has been performing strongly and is an innovative company. In 2018, it continued to develop its online rental offering.



## RENTAL PRODUCT OF THE YEAR

### **WINNER >> HA20 LE Pulseo boom (Haulotte)**



### **Haulotte**

The HA20 LE is a very strong product and, as the first of Haulotte's all-electric Pulseo range, makes a strong statement on electrification and sustainability.



### **>> Highly Commended: H2O Solar Pod (AJC Trailers)**

The jury highly commended AJC Trailers for its H2O Solar Pod, a combined solar powered, battery storage and back-up generator with an integrated fuel storage tank.







## ERA TECHNICAL COMMITTEE AWARD

Judged by the ERA Technical Committee, this award is for a manufacturer who has gone a long way to meeting the needs of the rental industry in the products and services that it offers.

### WINNER >> Volvo Construction Equipment



Volvo has demonstrated a continuous commitment to the satisfaction of the needs and requirements of the European rental industry.



## ERA SUSTAINABILITY COMMITTEE AWARD

The ERA Sustainability Award, judged by the ERA's Sustainability Committee, is given to a single project, initiative or team within a rental company for an outstanding improvement in the area of sustainability.



The new policy launched by Loxam in 2018 - 'Safety, Anytime and Anywhere' - demonstrates the commitment of the company to safety among its other commitments to society. As Loxam has shown, risk prevention for safety is the duty of all.



## >> Highly Commended: Atut Rental (Poland)

The jury also highly commended Atut Rental.





## The ERA / IRN RENTAL PERSON of the Year

ERA / IRN Rental Person of the Year is an award for an individual meriting recognition for their achievements over the past 18 months.



### **WINNER >> Dan Vorsholt (GSV Materieludlejning)**



Dan Vorsholt is a leader of what is now the largest rental business in his home country Denmark, a company with a reputation as a top class rental company in a fiercely competitive market.

Heading a business with more than 400 employees, he was responsible for a key acquisition at the end of 2018, which saw the company significantly increase its size and become the biggest rental business in Denmark.



## LIFETIME ACHIEVEMENT AWARD

Lifetime Achievement is awarded to a personality meriting special recognition in our industry. It could be a rental company leader, a representative from an industry association, or a representative from a supplier of equipment.

### **WINNER** >> **Pierre Saubot**



Pierre Saubot began his career in construction equipment working with Bergerat Monnoyeur in France in the 1970s. While there, he established a lifting equipment division, and it was this experience that set him on his way to becoming one of the pioneers of aerial work platforms in Europe. By the mid-1980s, he had embarked on the creation

of a business that would become the largest aerial platform manufacturer in Europe. He acquired crane companies Pinguely and Haulotte and the story since then has been one of enduring success. Over the past 30 years, the company has grown steadily, expanding its manufacturing footprint to the Americas and Asia, and widening its product range to include telehandlers and vertical mast products.

Pierre Saubot has led Haulotte throughout its 32-year history, more recently helped by his son, Alexandre. He has also been actively involved throughout his career in efforts to professionalise the industry through active involvement in associations. He is a former president of IPAF, as well as two of the most important industry bodies in France, MTPS and FIM.

In 2011, he was a winner of the lifetime achievement award at the International Awards for Powered Access.



# Four events - stronger together



## SAVE THE DATE

Three days of Rental and Access events

# 9-11 June 2020

## MECC Maastricht, The Netherlands

### WHY VISIT

- Discover new products and more cost-effective solutions
- See the latest technological advances
- Have face-to-face meetings with new and key suppliers
- Obtain expert advice on specific challenges
- Gain new ideas and insights to grow your business
- Engage with the local and global rental community
- Stay up-to-date with emerging or changing trends
- Attend the ERAs annual convention and awards
- See the latest information technology

### WHO VISITS

- Large and small rental companies
- General equipment rental companies
- Specialist rental companies (power, pumps etc.)
- Aerial platform rentals (also attending APEX show)
- Industrial equipment rental
- Small tool rental
- Landscaping/Groundcare rental

### WHO EXHIBITS

Manufacturers and suppliers of

- Compact construction equipment
- Generators and compressors
- Small tools and equipment
- Aerial platforms/scaffolding
- Landscaping/groundcare equipment
- Rental software specialists
- Asset tracking technology

### TO EXHIBIT CONTACT

EVENT ORGANISER  
Gerdi Hondebrink  
e-mail: gerdi@ipi-bv.nl

INTERNATIONAL BOOKINGS  
Paul Routley  
e-mail: paul.routley@khl.com

ITALIAN BOOKINGS  
Fabio Potestà  
e-mail: info@mediapointsrl.it

To find out more visit

**[www.ireshow.com](http://www.ireshow.com)**



EUROPEAN  
RENTAL  
ASSOCIATION

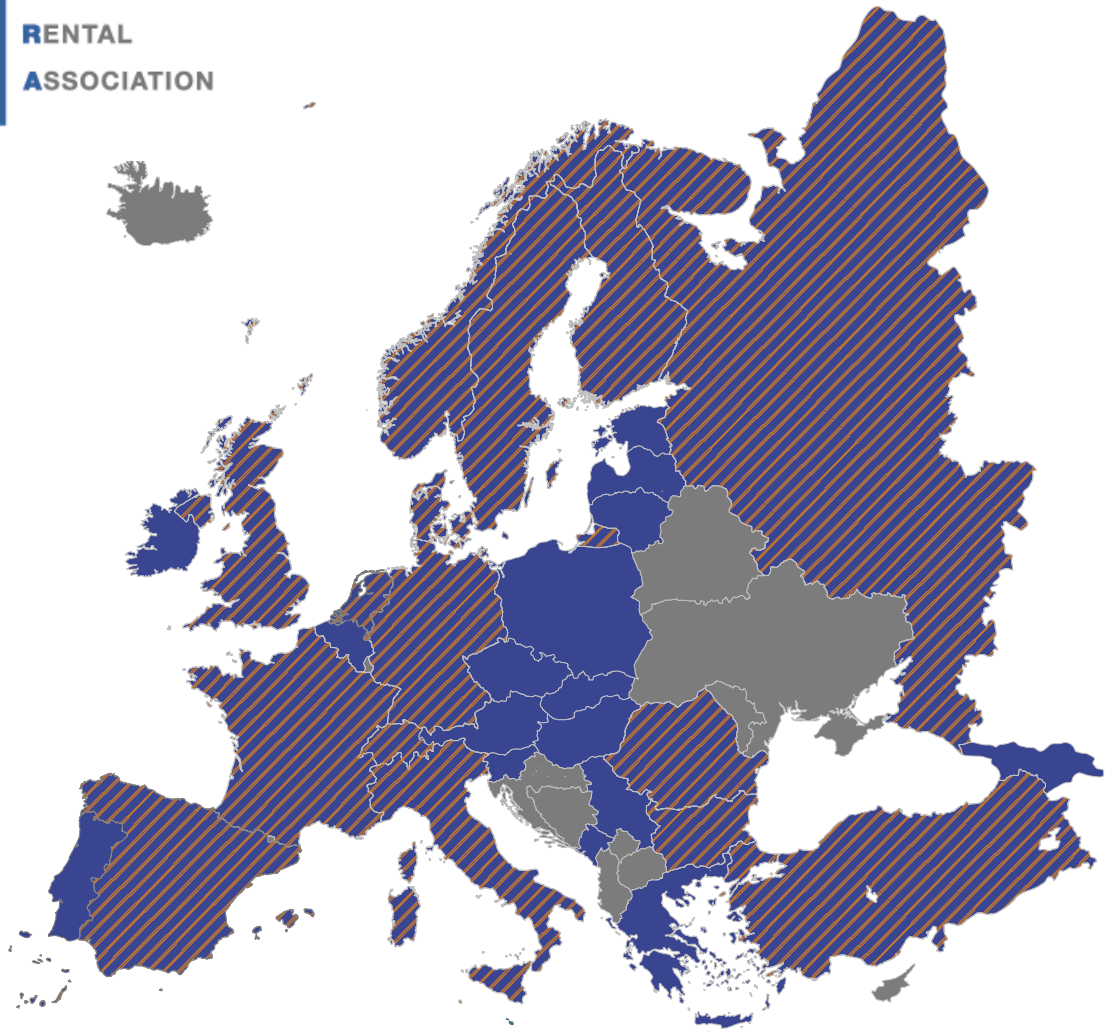
LEGEND:



National Rental  
Association +  
Individual companies



Individual companies



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# ERA MEMBER COMPANIES OPERATE IN ALMOST ALL COUNTRIES IN EUROPE

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*Find out which companies operate in your country at [www.erarental.org](http://www.erarental.org)*

## ERA MEMBERS (as of September 2019)

### RENTAL ASSOCIATIONS

**DENMARK** / Danish Rental Association

**FINLAND** / TKL

**FRANCE** / D.L.R.

**GERMANY** / BBI

**ITALY** / ASSODIMI

**NETHERLANDS** / Verhurend Nederland

**NORWAY** / Norwegian Rental Association

**RUSSIA** / NAAST

**SPAIN** / ANAPAT / ASEAMAC

**SWEDEN** / Swedish Rental Association

**SWITZERLAND** / VSAA-ASFP

**TURKEY** / IMDER

**UNITED KINGDOM** / HAE

**INTERNATIONAL ASSOCIATION** / IPAF

### RENTAL COMPANIES

**BELGIUM** /

Atlas Copco Portable Air

**BULGARIA** /

Stroyrent

**CZECH REPUBLIC** /

Johnny Servis

**FINLAND** /

Cramo

Ramirent

**FRANCE** /

Acces Industrie

Kiloutou

Loxam

**GEORGIA** /

Georent

**GERMANY** /

ADCO

HKL Baumaschinen

Jungheinrich

Liebherr Mietpartner

Wacker Neuson

Zeppelin Rental

**ITALY** /

Mollo

Tesa Group

Venpa

**LUXEMBURG** /

Mateco

**PORTUGAL** /

Machrent

MSR – Aluguer de Maquinas e

Equipamentos

**SPAIN** /

Germans Homs

**SWITZERLAND** /

Avesco Rent

**THE NETHERLANDS** /

Aerzen International Rental

Boels Verhuur

Bredenoord Aggregaten Verhuur

Energyst

Hoogwerkt

Peinemann Holding

Riwal

**UNITED KINGDOM** /

Ashtead Group

HSS Hire

Red-D-Arc Welderentals

VP PLC

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Ammann

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Atlas Copco Portable Air

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BBA Pumps

Bravi Platforms

Brendon Powerwashers

Briggs and Stratton

Caterpillar

Containex

Dagico Software

Datatag ID

Doosan Bobcat EMEA

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JCB

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KHL Group

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Point of Rental Software

Ritchie Bros. Auctioneers

Roesler Software Technik

Skyjack UK

Smartequip

Snorkel

Swepac

Sycor

TORO Europe

Trackunit

Volvo CE Europe

Wacker Neuson

Wynne Systems

XCMG

Yanmar

Zeppelin Lab

ZTR

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**Get the most comprehensive data available on the European Rental Industry**

The **ERA Market Report 2019** contains the most comprehensive data currently available on the European Rental Industry.

The Report contains a country-by-country analysis covering 15 European countries, detailed market size information for the years 2014-2018 and key ratios, including fleet size, investment and penetration rates.

Find out what to expect of the Rental Industry in each country with the 2020 forecasts!

If you would like to get your copy, please contact the European Rental Association by email on [era@erarental.org](mailto:era@erarental.org).

