



EUROPEAN
RENTAL
ASSOCIATION

Annual Report 2017

WWW.ERARENTAL.ORG

 [@era_rental](https://twitter.com/era_rental)

Save the date for the next
ERA Convention in Vienna
23– 24 May 2018



EUROPEAN
RENTAL
ASSOCIATION



Dear Colleagues,

In the last years, the equipment rental Industry has shifted from being a supplier of equipment fulfilling customers' needs to becoming an important partner in the now so called "sharing economy". It is adequate and efficient to use equipment only when needed, leaving costs of ownership to the rental companies. This trend is irreversible!

As long as the rental companies provide their customers with reliable, simple and cost-effective solutions, the customers will prefer to rent rather than to own. If the rental companies succeed in that, their potential for growth will be unquestioned.

For that reason, the theme of the last ERA Convention, "Securing talent for the future", was well chosen. The equipment rental industry needs to participate in the "war for talent". Having the right people on board will be a key factor in harvesting the potential and establish further growth of the equipment rental business.

Over the last months, our association, ERA, has been focusing on People and, more particularly, on new generations and how to attract and to keep them. A study on that topic was carried out before the Convention and presented during the opening panel and it is our objective to use the conclusions of this report to improve the Human Resources management in the rental business.

2017 has been a busy year for the newly appointed Board as well as for the Committees of ERA and the Future Group and I would like to thank again the other Board members as well as all the members involved in the ERA working groups. Doing such a great work for the sake of the European equipment rental industry on a volunteer basis is remarkable. Thank you also to the national rental associations for their support and their active participation to ERA.

Next year, the ERA Convention will take place in the beautiful city of Vienna, on 23 and 24 May. I look forward to seeing you there!

Yours faithfully,

Pierre Boels
ERA President

ABOUT ERA

The key mission of ERA is to promote the rental concept in order to foster a continued growth of the rental industry by creating an open European market, at a much larger scale than any national market.

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 the rental associations

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.

ERA BOARD

- > Manages ERA
- > 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
 Mark Anderson / Vice President
 Xavier du Boÿs / Vice President
 Leif Gustafsson / Vice President
 Wolfgang Hahnenberg / Vice President
 Armin Rappen / Vice President
 Luis Angel Salas Manrique / 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 the ERA's events

The Era Secretariat is composed of:

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

TABLE OF CONTENTS

	WELCOME LETTER	3
1	ABOUT ERA	4
	TABLE OF CONTENTS	5
2	MARKETS OUTLOOK: TRENDS AND EVENTS IMPACTING THE RENTAL INDUSTRY	6
3	ERA ACHIEVEMENTS 2017	11
	• PROMOTION	12
	• STATISTICS	13
	• SUSTAINABILITY	17
	• TECHNICAL	20
	• NATIONAL ASSOCIATIONS	22
	• FUTURE GROUP	23
4	ERA CONVENTION 2017	24
	• PANEL	25
	• PLENARY SESSION	26
	• GUEST SPEAKER	28
	• WORKSHOPS	29
5	EUROPEAN RENTAL AWARDS	31
6	ERA MEMBERS	42

MARKETS OUTLOOK: TRENDS AND EVENTS IMPACTING THE RENTAL INDUSTRY

RENTAL INDUSTRY TRENDS

Flashback on the events in the Rental Industry in the second part of 2016

Hertz Equipment Rental (HERC)'s separation from its car rental parent Hertz has been completed, with both companies now listed as independent entities on the New York Stock Exchange. Herc is an equipment rental firm with 280 branches in North America, 4,600 employees and 2015 revenues of nearly US\$ 1.7 billion.

TVH Group has acquired 100% of Industrial Access from the Balkan Accession Fund (BAF) and founder and CEO Stefan Ponea, who will continue to work with the company for a period of at least three years. The acquisition includes the rental management software developed by Mr Ponea and TVH could potentially use this software for its other rental operations.

Loxam and TVH are separately pursuing the acquisition of UK-based powered access renter Lavendon Group.

Kiloutou has acquired **Aveco**, a scaffolding and equip-

ment rental specialist in the Navarre and the Basque regions of Spain, with three locations and 40 employees.

Strong acceleration of consolidation in the rental industry in the first part of 2017

UK rental company Ashtead Technology has acquired TES Survey Equipment Services, in a bid to increase its customer service offering in the Middle East. The company, which is headquartered in Abu Dhabi, sells and rents a range of environmental, geophysical, survey and ROV (Remotely Operated underwater Vehicle) equipment.

Latvian rental company Storent has begun its expansion into the Nordic markets with the acquisition of Finnish company Leinolift, which rents aerial lifts and cranes, as well as provides crane, lifting, transportation, hauling and jacking services.

Eight Hewden depots have been sold by Hewden administrators EY, following the announcement of the UK rental business going into administration.

United Rentals is acquiring NES Rentals for US\$ 965 million in cash, the companies have announced. NES is one of the ten largest independent aerial work

RENTAL INDUSTRY TRENDS

platform rental companies in the US. This is the largest acquisition URI has made of an independent rental company since its purchase of RSC Holdings in 2012 at a value of US\$ 4.2 billion.

Australian rental firm Kennards Hire acquired Perth-based rental company Belmont Hire, taking its total number of depots to 19 in Western Australia.

French rental company Loxam acquires Lavendon and Hune and more than doubles its aerial platform's fleet. The company, which had a fleet size of just over 16,000 units, now boasts a total fleet size of 43,350 for aerials, when adding Lavendon's 22,000 and Hune's 5,000. With a presence in 21 countries worldwide and combined revenues of more than € 1.3 billion, Loxam said this bolstered its leadership in the European equipment rental market.

Ashtead Group said that its US business, Sunbelt Rentals, has acquired Pride Equipment Corporation in a deal worth US\$ 279 million. Pride Equipment Corp is a US-based provider of rental equipment, mainly aerial work platforms (AWPs) to the construction, industrial and movie production industries. The company operates in New York City and surrounding areas.

Boels Rental has moved to the UK for the first time with the acquisition of Supply UK Group, a nationwide tool hire business. Supply UK is based in Manchester and has 25 branches throughout the UK, including five specialists' survey and laser rental locations.

The Netherlands-based Riwal has acquired German rental company AFI GmbH, which rents aerial work platforms, telehandlers and forklifts, and was founded in 2003 by Günther Aust. Today the company operates a fleet of 1,300 machines across Germany and has 110 employees.

Equipment manufacturer Atlas Copco has opened a new headquarters for its specialty rental business in Boom, Belgium. The brand-new building will also serve as the main competence centre for Atlas Copco's rental business in the region, supporting its network of 50 depots and customers across Europe.

Boels rental has fully acquired IQ-Pass, a Netherlands-based company that specialises in technology to manage crowds and control worker access to industrial, construction and maritime sites.

Noble Rents has sold its Los Angeles assets to Sunbelt Rentals for US\$ 46.34 million.

TVH Group has acquired Gardemann, the German access rental business owned by Loxam. TVH will own the two largest access rental businesses in Germany, adding Gardemann to the Mateco business that it acquired in 2012. The combined fleet of the two operations will be approaching 10,000 units, with Mateco's 6,000 units augmented by the 3,500 machines owned by Gardemann.

RENTAL INDUSTRY TRENDS

Strong acceleration of consolidation in the rental industry in the first part of 2017 (to be followed)

US-based rental company Compact Power Equipment will be acquired by The Home Depot for a purchase price of US\$ 265 million, the company has confirmed.

UK-based temporary power provider Aggreko has announced the acquisition of Younicos in a £40 million deal. Headquartered in the US, Younicos is a technology company that develops and sells energy storage systems and control software.

French rental company Kiloutou has entered the Italian market with the acquisition of sister companies Cofiloc and Euronol. Both companies specialise in the earthmoving and access sectors in Italy, and boast a fleet size of nearly 4,000 products between the two of them.

French rental company Loxam has agreed an acquisition fee of € 25 million for Cramo's Danish equipment rental operations. The divestment is said to be in line with Cramo's strategy, announced earlier this year, which will see the company focus its attention on its modular space business, in a bid to be a market leader in Denmark.

Ashtead Group's North American business Sunbelt Rentals has signed an agreement to acquire Contractors Rental Supply (CRS) for an initial cash consideration of C\$ 275m with an additional earn out of up to C\$ 20m dependant on future performance. CRS is a leading provider of rental equipment in Ontario, Canada, employing more than 400 people across 28 locations.

In August, **United Rentals and Neff Corp.** entered into a definitive agreement for United Rentals to acquire Neff Rental for a total purchase price of approximately \$1.3 billion. The deal was announced the day after H&E Equipment Services announced that it would not attempt to outbid the then-unannounced buyer. Neff, No. 10 on the RER 100 listing of the largest equipment rental companies in North America, has 69 branches in 14 states, and is especially strong in the South and Southeast. Neff offers earthmoving, material handling, aerial and other equipment and is particularly strong in the earthmoving equipment rental arena.

New trends continue to develop through the rental industry over the period

German company Zeppelin Rental has introduced a new rental business targeting small and micro customers. Zeppelin said the Fast Rent business was aimed at the gardening and landscaping, construction expansion, renovation, restoration and modernisation markets.

Finnish rental company Ramirent has signed a multi-year deal with contractor YIT to support its construction site in Pasila, Helsinki. Ramirent said the agreement covered a range of services, including equipment rental, logistics planning, directing transport and chemicals management, scaffolding, weather cover and training.

RENTAL INDUSTRY TRENDS

The mixed-fleet telematics standards from the **US association of Equipment Manufacturers (AEM) and association of Equipment Management Professionals (AEMP)** has received approval from the ISO. The standard is said to enable equipment users to gather more data into their fleet management software.

German company Zeppelin Rental is now offering an online tool for the spatial design of its temporary onsite accommodation. Users will be able to design their temporary accommodation in order to meet the needs of their space, staff numbers and furniture. Once designed, the customer will then get a quote based on the individual design.

Cramo has launched its new online rental service eCRent in Sweden, Finland and Germany, rolling out the system to its other territories gradually during 2017.

In the meantime, consolidation and development continue among the equipment manufacturers and the industry service providers

Terex has sold its German compact equipment business to Yanmar in a US\$ 60 million deal.

Manitou has announced it will open a new manufacturing facility in Brazil. The French manufacturer hopes to improve its telehandler market share in Latin America.

Trackunit has acquired German telematics provider Dreyer+Timm GmbH, a well-established telematics company for vehicles, trailers and machines in Europe with 30,000 active licenses.

Manufacturers Hyundai Heavy Industries (HHI) and CNH Industrial have joined forces in a ten-year global mini excavator supply and marketing agreement.

Formwork manufacturer **Peri** is building a new primary plant for its PERI UP scaffold technology in Güzburg, Germany, as it outlines its plans for expansion in the scaffold sector.

Socage has acquired crane and truck mounted platform manufacturer Manotti. Socage, based in Modena, Italy, decided to buy fellow Italian manufacturer and competitor Manotti to reinforce its position in the market.

France's Fayat Group has agreed to buy the road construction equipment division of Atlas Copco as it looks to strengthen its position in the market. The division manufactures rollers for asphalt and soil applications, pavers and planers, which are branded under the name of Dynapac.

Terex construction has announced it has agreed to sell its India-headquartered compact construction business to Manitou. The deal is the latest in Terex's divestment of its construction equipment activities, following the sale of its UK-based compact construction business to a subsidiary of Group Mecalac in

RENTAL INDUSTRY TRENDS

late 2016. Mecalac has also manufacturing facilities in France, Germany and Turkey and is moving into North and South America where it said it was taking an organic approach to the markets there.

Yanmar Europe is restructuring its construction and compact business with the French and German subsidiaries under one organisation from April 1.

Hitachi is to buy compressor manufacturer Sullair from Accudyne Industries for US\$ 1.245 billion. The deal gives Hitachi portable compressors as well as much strong presence in North America.

US equipment manufacturer John Deere is to acquire the Wirtgen Group for an estimated US\$ 5.2 billion. Headquartered in Germany, the Wirtgen Group claims to be the global leader in the manufacture of road construction equipment. The group boasts five premium brands – Wirtgen, Vögele, Hamm, Klee-mann and Benninghoven – spanning milling, processing, mixing, paving, compaction and rehabilitation operations.

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



ERA ACHIEVEMENTS 2017

ERA, the European Rental Association, was created in 2006 to promote the rental concept in order to facilitate a continued growth of the rental industry by creating an open European market, at a much larger scale than any national market.

What has been achieved during those 11 years, and especially during the last year?

ERA's work focuses on 7 main areas:

- **Promotion** of the rental concept, as a solution for cost saving and sustainability / circularity concerns,
- **Equipment**, working with the manufacturers in the Technical Committee,
- **Statistics** on rental market, prepared in association with IHS Global Insight,
- **Sustainability and circularity**,
- **Future challenges** of the rental business,
- **Harmonisation** of the national regulations,
- **Support** to the rental associations.

It has also included the defence of the industry at European level through contacts with other European associations and with the European authorities, the publication of guidance on the production of safety instructions and the production of a framework for general rental conditions, which can be used by rental companies and associations for their own rental conditions. It has also supported a European initiative of harmonisation of mobile machinery road requirements by providing rental industry's specific concerns. ERA acts as the representative association of the equipment rental sector at European level, complementing the activities undertaken by national rental associations locally. ERA has also been helping foster the development of new rental associations, with the emergence of rental associations in new markets. The most recent is the Polish Rental Association (PRA), created in 2015.

At the beginning of 2016, ERA decided to develop a Future Group, a working group made of managers issued from younger generations and providing their thoughts and vision on strategic issues. The philosophy supporting this approach is that, in this rapidly changing world and the digital revolution, younger people have certainly a different view than older people.

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

PROMOTION

The key mission of the ERA's Committee on Promotion is to promote the concept of rental in Europe. Over the years, the Committee has developed many tools our members can use in their own communication, such as the Discover Rental guide that was made to explain the benefits of rental to any person not familiar with our industry.

In 2017, the Committee continued spreading the benefits of rental through its work with the PR agency Founded. A first campaign was launched around the translation of the ERA's Equipment Total Cost of Ownership Calculator ("TCO Calculator"), website and apps, with 5 additional languages. A second campaign was then launched to communicate on the online sustainability brochure and its translation in 6 additional languages, hence promoting that rental is a sustainable concept. The next communication will be about the publication of the ERA Market Report 2017. This is a recurring and successful campaign, detailing the content of the report and underlining the main trends of the European equipment rental market.

Founded also helps the Promotion Committee designing the social media plans: ERA is active on Twitter (@era_rental) and on LinkedIn. In particular, ERA manages a Group on LinkedIn, Construction Equipment Rental – Europe, with around 400 members. The aim of this group is to facilitate discussions on the key issues facing equipment rental in Europe as well as to inform its members of important events and news of interest to its community.

After a competitive tender process, the Promotion Committee decided to work with the communication expert Bright Sparks PR Ltd on a series of e-books focusing on key issues for the equipment rental busi-

ness. The first one was published in March on the topic of Recruitment & Retention of Millennials. The focused interviews with rental companies and the best practices deal with their different outlook on life, their different ways of communicating and the fact that they are the future. The second e-book, built similarly, is about digitalisation in the rental business.

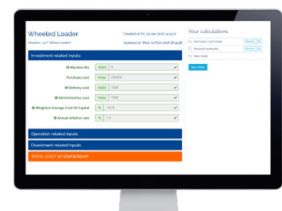


ERA is managing 2 websites:

the ERA website, www.erarental.org,
and the TCO calculator website,
www.equipmentcalculator.org.

TCO Website

- 1 Launched in English
June 2016
- 2 Translated into 5 additional languages
Jan 2017



The next step for the Committee is to move to video and active content management.

STATISTICS

The overall aim 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, the American Rental Association, 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.

HIGHLIGHTS OF SOME OF THE KEY FINDINGS IN THE 2016 REPORT INCLUDE

- AFTER ADDING IN 2015 SWITZERLAND AND AUSTRIA, THE 2016 MARKET REPORT INCLUDES ANOTHER COUNTRY, THE CZECH REPUBLIC, BRINGING THE NUMBER OF DETAILED STUDIES TO 15 COUNTRIES.
- THE HEADLINE FINDING FROM THE 2016 REPORT IS THAT THE EUROPEAN RENTAL INDUSTRY AS A WHOLE IS CONTINUING TO GROW AND, AFTER ADJUSTMENTS FROM NATIONAL STATISTICAL AGENCIES IN BOTH GERMANY AND FRANCE, THAT GERMANY HAS BECOME THE SECOND-LARGEST RENTAL MARKET IN EUROPE SINCE 2014.
- IN THE EU-28 AND EFTA COUNTRIES, EQUIPMENT RENTAL COMPANIES AND OTHER COMPANIES PROVIDING RENTAL SERVICES GENERATED A TOTAL RENTAL TURNOVER OF EUR 24.29 BILLION IN 2015, AT 2015 EXCHANGE RATES, OR GROWTH OF 2.0% COMPARED WITH 2014.
- AS WITH THE OVERALL ECONOMY, MOST OF THE NATIONAL RENTAL MARKETS ACROSS EUROPE EXPERIENCED POSITIVE GROWTH IN



2015. THE PICTURE SHOWS THAT MOST OF THE COUNTRIES ARE GROWING, INCLUDING THE CZECH REPUBLIC, WHICH HAD A 9.9% GROWTH RATE. ITALY AND FRANCE ARE THE COUNTRIES EXPERIENCING DECLINES, DOWN 0.6% AND 0.1%, RESPECTIVELY.

- FOR THE SAME COUNTRIES IN 2016, IT IS ESTIMATED THAT AVERAGE GROWTH WILL BE 2.8%.
- BASED ON 2013 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): 15,500
- NUMBER OF EMPLOYED PERSONS IN RENTAL COMPANIES (WITHOUT OPERATORS): 120,900

STATISTICS

OUTPUTS

EQUIPMENT RENTAL MARKET SIZE BY COUNTRIES IN 2015:

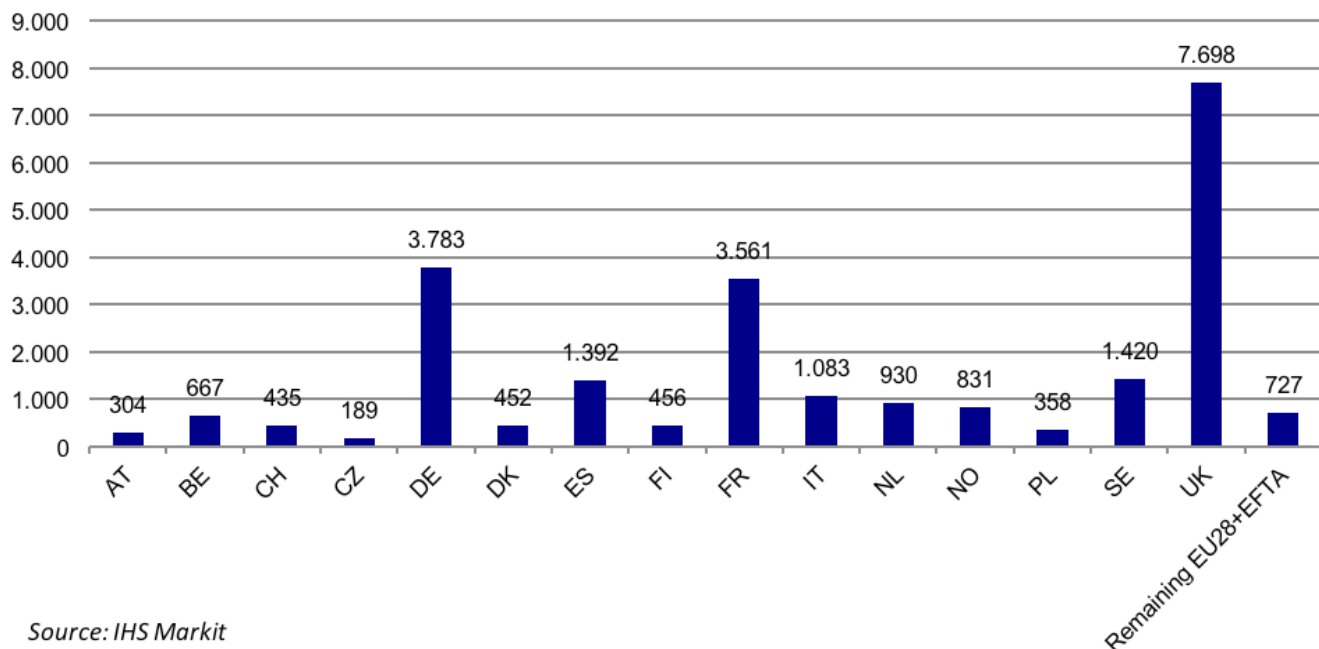
In terms of market size, in 2015, the three main markets are the United Kingdom, Germany and France, with EUR 7.7 billion, EUR 3.8 billion, and EUR 3.6 billion, respectively.

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

This graph and the following are from the ERA Market Report 2016.



Total turnover 2015 [million euros]



STATISTICS

PENETRATION RATES:

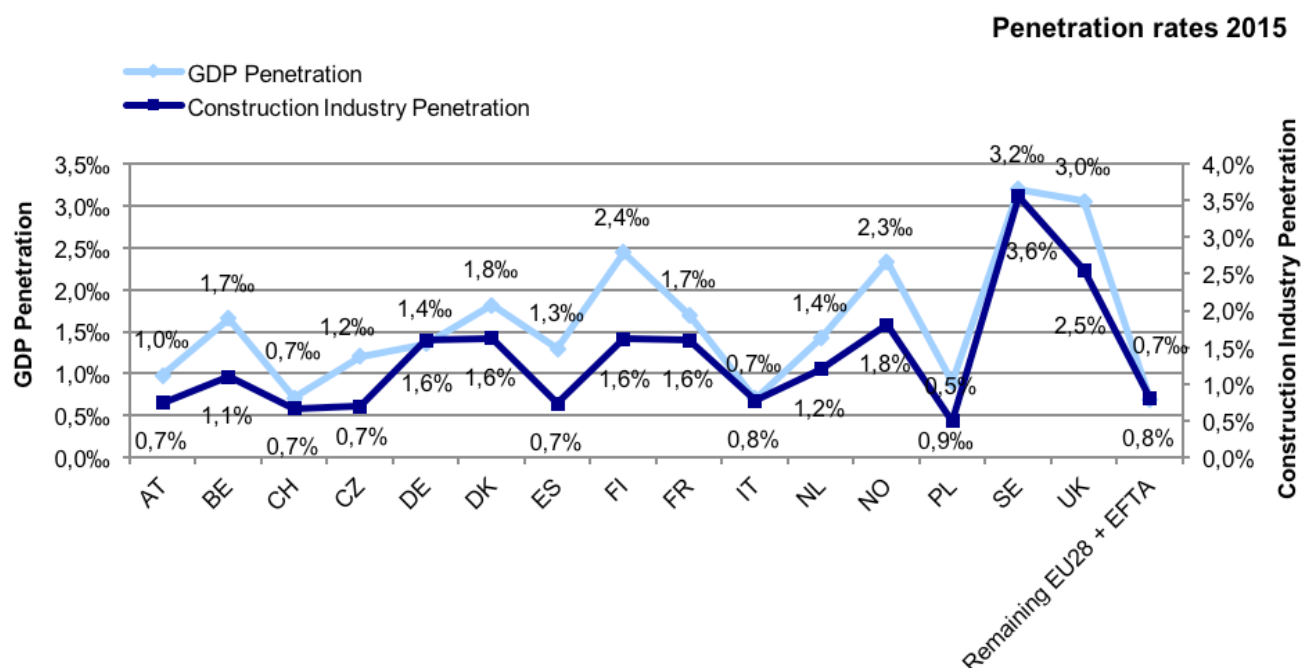
Average construction industry penetration in the 15 countries in the report in 2015 was 1.55%, significantly above the remaining EU-28 and EFTA countries' average penetration of 0.80%.

Construction industry penetration is the highest in Sweden, with a penetration rate of 3.6%.

Average GDP penetration in the 15 countries in 2015 was 1.71‰, significantly above the remaining EU-28 and EFTA countries' average penetration of 0.68‰.

Again, GDP penetration is highest in Sweden (3.2‰) and in the United Kingdom (3.0‰). These countries can be regarded as being the most advanced rental markets in Europe.

Looking at the two concepts of construction industry penetration and GDP penetration, and at the differences of penetration intensity between countries, this suggests that there is still room for the European rental market to grow ahead of the economy (particularly for those lesser performing countries).



Source: IHS Markit

STATISTICS

GLOBAL RENTAL ALLIANCE (GRA) SURVEY

The Japan Construction Rental Association (JCRA) officially joined the GRA ranks, with representatives attending the last meeting in Orlando in March 2017, along with those from the Canadian Rental Association (CRA), European Rental Association (ERA), Hire Association Europe (HAE) from the United Kingdom, Hire Industry Association of New Zealand (HIANZ), Hire and Rental Industry Association Ltd. (HRIA) from Australia and American Rental Association (ARA).

The addition of the Japan Construction Rental Association brings the third largest country from a global rental perspective to the Alliance.



"The Global Rental Alliance continues to be a valuable forum for industry and association representatives from around the world to engage on key issues that impact rental/hire operators," said Tony Conant, ARA CEO.

The agenda of this meeting included a review of the global survey initiative of the GRA, with a release of a 2015 combined rental revenue figure among the GRA associations of US \$ 91.5 billion as calculated by IHS Markit™ on behalf of the group.

This combined rental revenue figure includes that of Japan for the first time.

Discussion was held among the associations on the economic forecast for their countries through 2017 and the level of rental penetration as they choose to define it for their respective country.



SUSTAINABILITY

COMMITTEE CHAIR:

Franciska JANZON, Ramirent

ERA's Committee on Sustainability is aimed at supporting the rental industry in promoting the environmental benefits of rental as well as in developing tools for helping members to respond to requests from customers and aligning practices in the industry where relevant.

The rental business is inherently sustainable, since it uses the 5 following principles:

- shared usage,
- repairability,
- resource use,
- reusability,
- recyclability.

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

As far as the public authorities are concerned, the fact that the European Union is particularly interested in sustainability (Circular Economy Package in December 2015) is an excellent opportunity for the European rental business. The initiative of the European institutions to work on identifying and reducing the internal market related barrier is very encouraging for the rental business in Europe.

Following a study carried out by the consulting company Schuttelaar & Partners, ERA identified two major objectives and implemented corresponding action plans.



- Action towards the SMEs:

ERA decided to focus on helping SMEs to implement practical and affordable practices that will benefit them as well as their customers. ERA organised a workshop on "Sustainability in the rental SMEs" for the national associations in February 2016. This workshop identified some sustainability related issues rated in terms of importance to the SMEs themselves and to external stakeholders. Following this workshop, the Sustainability Committee decided to use an existing graph, established by McKinsey, and to enrich it with examples from the rental industry. This graph outlines the various ways that companies can use sustainability initiatives to manage risk, drive growth, or improve returns on capital.

The workshop on "Sustainability and Profitability" organized at the Convention 2016 identified sustainable examples in the rental business applicable to growth,

SUSTAINABILITY

risk management or returns on capital (in relation with the Sustainability Graph) and provided food for thought for the following meetings of the Committee.

- Promotion of the rental business towards the European authorities:

Resource efficiency and circular economy are major topics nowadays and in the near future. In order to deal with scarcity of raw materials and other resources, our society needs to look for ways to "close the cycle" in our economy (so-called circular economy) and to prevent valuable raw materials to go to waste.

If the shift from ownership of goods to access to goods is remarkable in many situations of our everyday life (car sharing systems, city-bicycles, etc.), it is even more relevant for professional equipment: rather than everyone buying its own machines, availability of rental equipment when it is actually needed is more efficient and sustainable.

Therefore, the rental industry plays a key role in the transition to a sustainable economy.

ERA took actively part in the discussions around the Circular Economy Package. In December 2015, the European Commission published the Circular Economy Package. It includes several initiatives towards a Circular Economy and is accompanied by legislative proposals. The objective of a circular economy is to maintain the value of products, materials and resources in the economy for as long as possible, while minimising the generation of waste. ERA promotes the fact that the rental business is contributing to the transition to

the Circular Economy and has met with representatives of the European Commission, the European Parliament and the Permanent Representations of the European States to the EU. In 2016, ERA issued the "Manifesto for the Promotion of the Environmental Benefits of the Rental Concept". This Manifesto was redesigned in 2017 and gives a synthetic vision of the 5 principles used in the rental business.



MANIFESTO for the PROMOTION of the ENVIRONMENTAL BENEFITS of the RENTAL CONCEPT

ERA calls on the EU to promote the environment benefits of the rental concept.
The motivation comes from the 5 principles used in the rental business:

- Shared usage
- Repairability
- Resource use
- Reusability
- Recyclability

SHARED USAGE:

- The construction companies can access equipment when required.
- The centralised ownership leads to a more frequent and therefore more efficient use of the equipment.



REPAIRABILITY:

- The rental companies contribute to a product design facilitating maintenance and repair activities.
- The rental companies focus on spare parts management.
- The rental companies ask for increased information on product repair from the equipment manufacturers.



RESOURCE USE:

- Rental companies search for equipment to offer the most sustainable option to their customers.
- Rental companies provide theoretical and practical trainings to their customers to optimise the use of equipment.



REUSABILITY:

- Components of the dismantled construction equipment can be reused.



RECYCLABILITY:

RENTAL COMPANIES TAKE CARE OF THEIR EQUIPMENT BY:

- Repairing when it is still possible.
- Recycling when it is at the end of its life cycle.
- Selling it to second hand markets, if it still complies with the regulations.



RENTAL COMPANIES USE THEIR BARGAINING POWER TO DEMAND EQUIPMENT SUPPLIERS TO:

- Invest more in R&D to limit the use of non-recyclable material.
- Take responsibility for end-of-life of equipment by collecting, reusing or recycling.

ABOUT ERA

ERA is the representative association of the European equipment rental business. It represents around 5,000 companies, either directly or through the national rental associations. This rental sector employs more than 120,000 people and contributes €24.5 billion to the economy.

SUSTAINABILITY

Late 2015, ERA published the ERA Sustainability On-line Brochure,

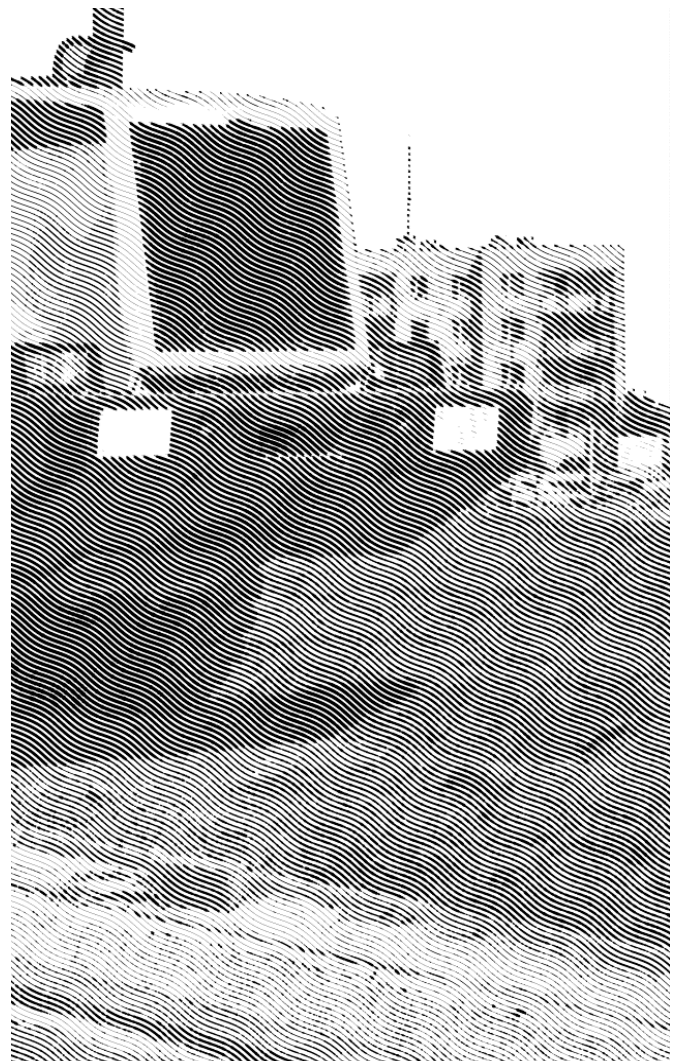
http://sustainability.erarental.org/sustainability_in_the_rental_industry/.

The brochure presents a dynamic set of best practices on sustainability in the rental industry, categorized according to their role in the supply chain. The users can circulate depending on their category (rental company, customer, public authority). The brochure is regularly updated (last update on September 2016, next update planned in 2018) with new examples of best practices as well as additional best practices coming from European rental companies.

Initially published in English, it was translated in 6 additional languages in spring 2017 and promoted through the National Associations towards their members.

During the meetings with different representatives of the European institutions, it has become obvious that, in order to promote rental all over Europe, it would be necessary to work first on reducing the obstacles to a single European rental market. For that reason, ERA has asked some of its members for some examples of internal market related barriers. The rental companies came back with many examples of difficulties encountered in their everyday business. Those examples have then been gathered in a paper called "Internal Market related barriers – Examples from European equipment rental companies". It was sent to the European Commission in December 2016

and immediately aroused interest of several European representatives. ERA is now following up with the European Commission on this paper (for instance, ERA is now part of the working group on harmonisation of road circulation requirements for NRMM). ERA's goal is to achieve that the rental companies have less issues to do their business all over Europe.



TECHNICAL COMMITTEE

COMMITTEE CHAIR:

Martin SEBESTYEN, Zeppelin Rental

The ERA's Technical Committee gathers representatives of rental companies and equipment manufacturers. Together, they aim at progressing on issues of common interest where better cooperation between rental companies and manufacturers can help solving concrete issues for mutual benefit.

Its mission statement is: "Making it safer, easier and cost effective for the rental industry by working together with equipment stakeholders on:

- the key drivers of the total cost of ownership (damages, accidents, maintenance, etc.),
- standardisation wherever possible (telematics, decals, compaction, etc.),
- simplified instructions manuals and training (operation, maintenance, safety, e-learning?)
- parts management and key drivers of repair and maintenance total costs,
- new legislations impact on rental industry."



The very first work of the Committee was the publication of the "Key Drivers of the Total Cost of Ownership", a guidance document representing a common understanding among the rental companies and the OEMs of the drivers influencing the total cost of ownership of equipment throughout the three main phases of the lifecycle of equipment: acquisition, operations & maintenance, divestment.

A survey was conducted in 2012 among the rental companies to identify:

- the most common damages to rented equipment caused by inexperienced users,
- the most common accidents caused by inexperienced users,
- the categories of equipment "under-maintained" most by customers when rented out,
- the most frequent reported issues in service calls,
- the type of information on Operations, Maintenance and Safety the rental companies believe their customers would like to receive.

Key drivers

TOTAL COST OF OWNERSHIP OF CONSTRUCTION EQUIPMENT

TECHNICAL COMMITTEE

To build on the results from the survey, the Committee organized workshops at BAUMA 2013 with experts from rental companies and OEM's to analyse and research how accidents and damages can be best reduced for construction and access equipment.

As a follow-up on these workshops, the Committee assessed 27 issues to be graded by:

- business impact for the rental companies,
- risk for personal injuries during usage.

To allow an in-depth analysis of the issues identified in those works, the Committee decided to organise face-to-face meetings between representatives of rental companies and representatives of a selected manufacturer on a confidential basis. The first ones took place in October 2014 and were followed by other rounds in 2015, 2016 and 2017.

From 2017 on, it was agreed within the Committee that the face-to-face meetings will take place twice a year to ensure a faster and better communication. The topics addressed during those meetings have been so far:

- **Tie down and lifting points and quick guides:** review of the feasibility for the OEMs to use:

- the ERA recommendations on tie down and lifting points,
- the framework of quick guides for future machine adaptations, both available on the ERA website,

- **Maintenance and preventive maintenance,**
- **Telematics solutions:**
 - which data is already available per OEM,
 - how to summarise the different data / information sent by the OEMs into one platform of a rental company,
- **Technical training and education,**
 - the rental companies have created an overview of levels for the technicians to help the OEMs proposing adapted training concepts,
- **Innovation:**
 - open question to each OEM to present future developments in relation to technical extensions for the rental industry,
 - discussion of topics addressed by the rental companies

The next topics for the Committee are:

- Durability (pre-delivery inspection by the OEM to avoid failures of new machines),
- Education and technical training for rental companies,
- Maintenance of equipment (intervals, predictive and preventive maintenance).

NATIONAL ASSOCIATIONS

The Committee was created in 2013, as a continuation of the former Norms and Safety Committee, which later became the EU Affairs Committee, and of the Association Day. It is composed of the representatives from the national rental associations that are members of ERA.

This Committee is the platform for the associations to meet and exchange and also for them to think about how to improve the rental business in general. It focuses notably on promotion of rental and communication, management and coordination of trade events, safety issues, standardisation, theft, attracting talents to the industry and all issues relevant to the national associations.

It is also keeping up-to-date 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 the following ones:

- **Engines Regulations,**
- **Noise of equipment in outdoor use,**
- **Compliance of equipment,**
- **Cross border transportation of equipment,**
- **Inspection of Work Equipment,**
- **Operator licences and training,**
- **Instruction manuals,**
- **Equipment theft.**

All these issues are followed either by the National Associations committee or by the Technical committee or by the Sustainability committee.

As a consequence of the findings of the Sustainability Committee about the difficulties for the SMEs to consider Sustainability as a priority, it was decided to involve the national associations in this topic so that they can motivate their members to put Sustainability more central in their business approach.

ERA is also in touch with various European organisations. First on the list is the European Commission. In particular, ERA is very involved in the discussions about Sustainability, Circular Economy Package and Green Public Procurement.

On top of that, ERA is a partner of critical stakeholders associations in Brussels like CECE, FIEC and Leaseurope.



FUTURE GROUP

As it is observed more and more in the larger organisations, ERA has decided to gather some managers from rental companies, issued from younger generations, in a group called “ERA Future Group”.

The philosophy supporting this approach is that, in this rapidly changing world and the digital revolution, younger people may have, in certain strategic areas, a different view than older people.

The objective is that they provide their thoughts and vision on strategic issues.

Particular attention is given to the sharing of the findings with the industry at large and, in priority, with the national rental associations.

Since January 2016, this group of around 15 young managers, representing different companies, different countries, different functions, with an average age of 35, meets regularly.

Their priorities are split between:

- Customers,
- People,
- Technology.

The main projects over the last months have been:

- The appointment of a HR Consultant, also issued from younger generations. This Consultant, Daniel Walzer, has been in charge of preparing a review of the challenges of the equipment rental companies competing with other indus-

tries in securing talent for the future. The report was presented during the Convention and the corresponding videos are available on the ERA website, in the Publications section.

- The glossary of the job positions available in the equipment rental industry. The works will be enriched by discoveries of Daniel Walzer’s research.
- The creation of a guide dedicated to the rental companies to help them choosing and implementing a CRM system. This guide is still in progress.
- The mapping of the existing equipment rental online platforms in Europe and in the USA in an attempt of a better understanding of their market share.

The Future Group is involved in the workshops organised during the Convention and, together with the other committees, they participate in reviewing the findings of each of them and take some actions.

On top of the projects that are still in progress, the Future Group plans, in the coming months, to:

- Go back on the issue of younger generations, taking advantage of the work developed around the last ERA Convention and building from there to establish guidance for the rental industry,
- Test the concept of digital conversation analysis,
- Work on Big Data. This theme is indeed addressed by most of the committees. The Future Group has a more horizontal approach of it.

ERA CONVENTION 2017

THE 12TH ERA CONVENTION TOOK PLACE IN AMSTERDAM, FROM 2 TO 4 MAY 2017

In addition, the International Rental Show (IRE), the Aerial Platform Exhibition (APEX) and the European Awards Dinner took place at the same venue. During 3 days, rental experts from Europe and the world gathered at the RAI in Amsterdam for the largest European rental event.

The theme of this Convention was "How to secure talent for the future" and it featured a number of keynote addresses and workshops. Other topics of interest to the rental business were also addressed, as you will read in the following pages.

Thanks to the companies Boels Verhuur and Loxam, the attendees to the convention could also visit 2 branches in the vicinity of Amsterdam.



EUROPEAN
RENTAL
ASSOCIATION

PANEL “TOMORROW’S TALENT – HOW TO COMPETE WITH OTHER INDUSTRIES” *



The Convention began with a presentation by Daniel Walzer, the Human Resources Consultant appointed by ERA to carry out a study among the European equipment rental industry on the theme “How to compete with other industries in securing talent for the future?”.

Daniel highlighted the main concerns of the industry in terms of securing talent and shared the following best practices:

- Promoting the job itself, not the industry
- Attracting and educating young professionals,
- Recruiting digital,
- Recruiting more females,
- Training and retaining,
- Tracking.

He proposed some possible ways of improving the situation working together at a European level.

This presentation was followed by a panel discussion on the same topic, gathering CEOs and Human Resources experts from the equipment rental and the construction business.

Patrick Barrett, Director of Training and Development for United Rentals, Pierre Boels, CEO of Boels Rent-

als, Domenico Campogrande, Director Social Commission at the European Construction Industry Federation (FIEC), Leif Gustafsson, CEO of Cramo, Nicolas Jonville, Human Resources Director at Loxam, and Paul Lewis, Group Sales Director at HSS Hire, shared their views on the challenges and opportunities of the equipment rental business, including the arrival of the new generations on the employment market, the image of the rental business, digitalization, etc.

For the first time, the audience was asked to participate to the discussion, answering some questions of the moderator online by using voting pads.



*Daniel Walzer's presentation and hand-out are available on the ERA website,
www.erarental.org/en/events/convention/ire-2017-and-era-annual-convention*

The report is available on request to the ERA Secretariat.

PLENARY SESSION *



Jean-Paul Teyssen - The natural choice through leadership and delight management

Jean-Paul Teyssen started with Carglass in 1989, as CEO of Carglass Netherlands. He then became CEO of Carglass in Germany and, in 2001, CEO of Carglass Belux and Belron International Key Account Director. He retired in January 2017. Jean-Paul described the strong link between customers' and employees'

satisfaction: customers' expectations will be exceeded only if the employees are satisfied and they are offered an unforgettable experience in their company. Satisfied employees influence the performance of Carglass. Jean-Paul talked about "Customer Delight", staff satisfaction with a focus on leadership styles, climate and performance management.



Kevin Appleton - Driving factors behind fleet investments

Kevin Appleton is the former CEO of Lavendon Group. He is currently Chairman and Managing Director of Yusen Logistics (UK) Ltd – a Japanese owned contract logistics and forwarding business- and non-executive director of Ramirent, Horizon Platforms and Arco Ltd. The rental industry spends huge amounts on new equipment. Kevin examined some of the driving factors behind fleet investments and stressed that the equipment rental industry and its suppliers depend for their future upon a largely rational approach

to capex decisions.

He introduced the notion of Lifetime total net cost of ownership, from the acquisition to the disposal, including utilization, lifetime rental revenues and lifetime net costs of transport, repair and maintenance. He demonstrated that a 10% reduction in demand for rental companies exaggerated by market oversupply easily translates into a 50% reduction in request for investment to manufacturers. Consequently, it is critical that OEMs resist the urge for oversupply.

PLENARY SESSION*



Fred Bratman and Patrick Barrett - Dealing with diversity, gender and minorities

Fred Bratman was senior vice president, corporate communications and investor relations at United Rentals and has retired recently. Patrick Barrett is Director of Training and Development for United Rentals. Both presented how United Rentals has been dealing with diversity. Diversity is a strategic imperative. Diversity at United Rentals is not only visual; it also means diversity of experience, culture and education.

According to them, "companies that actively embrace diversity and consistently demonstrate their commitment to the many communities they serve, establish a sustainable competitive advantage in the marketplace": diversity is not just the right thing to do; it also brings tangible benefits to their company. Diversity Increases their pool of available candidates, creates a culture that employees want to be a part of and builds stronger bonds with their customers.



Michel Petitjean - Trends in the European Rental Industry

Michel Petitjean presented the trends in the European Rental Industry. After having commented the macro trends on construction and rental markets in Europe, Michel delivered the highlights of the 2016 ERA Market Report, including the focus on the UK, French, German and Nordic Countries rental markets. He presented the forecasts

updated as of May 2017 and introduced the 2017 Report's developments.

Michel finished his presentation with the results of the RentalTracker for Q1 2017. The ERA/IRN RentalTracker is a survey of business trends and sentiment in Europe's equipment rental industry that is carried out twice a year. The survey is jointly organised by ERA and International Rental News (IRN) magazine.

* Presentations available on the ERA website
www.erarental.org/en/events/convention/ire-2017-and-era-annual-convention

GUEST SPEAKER



Paul Redmond

Dr. Paul Redmond, author, keynote speaker and employment guru, is Director of Student Life at the University of Manchester. A leading expert on generations and the graduate labour market, Paul has presented at numerous events and conferences around the world.

Paul's research on Generation Y and the Future of Work has garnered him praise and respect from a range of national and international organisations, for which he consults about the influence of social and economic factors on employability.

His engaging and entertaining presentation to the Convention on the topic of "Generations at Work - Generation Y, digital natives and the new world of work" gave a very appropriate conclusion to this 3-day convention, talking about the challenges of the new world of work, the priorities of Generation Y and the differences between Gen Y and the older generations.

No doubt that it brought food for thought to the audience and that the way they look at their employees, or even family members, slightly changed after this speech!

WORKSHOPS *

For the second time, and following the successful experience at the 2016 Convention in Stockholm, ERA organised 3 workshops during the Convention, with the objective of getting an interactive participation of the attendees and collecting useful feedback from the audience. All the workshops were related to the respective Committees and were moderated by the corresponding chairman or woman. After having listened to 2 presentations, each workshop split in groups of 10 people and each group debated on a question related either to the subject of the Convention "Securing talent for the future" or to topics of interest for the committees.

The outputs of the workshops will then be analysed by the 3 Committees and by the Future Group and will be used in the coming works of the Committees.

After the break, the moderator, Nadine Dereza, and the 3 chairman and -women wrapped up the workshops in a plenary session.

PROMOTION – Winning the war on talent: how to become more attractive in order to reach and retain new talent?

After Fiona Perrin, Chairwoman of the Promotion Committee, presented the Committee Report over the last year, Dan Jenkins, Account Director at Bright Sparks PR Ltd, introduced the e-book recently published by ERA on "Recruiting and retaining millennials". He called on stage representatives of the companies interviewed in the e-book and questioned them about their experience with millennials.



Following those interviews, the participants of the workshops could choose between the following questions:

- Reaching and retaining new generations: What new methods of communicating to people will you bring to rental?
- How can we change the image of the rental industry to be more attractive?

* Presentations available on the ERA website, www.erarental.org

WORKSHOPS *

TECHNICAL & EQUIPMENT

How to adapt asset management to new generations and new technologies

Martin Sebestyen, Chairman of the Technical Committee, presented the works of the Committee, insisting especially on the face-to-face meetings organised regularly between OEMs and rental companies.

Helen Sowerby, Director of Business Development for Wynne Systems, gave a lecture about "Big Data and the Internet of Things", explaining how big data is changing the way we do business, what the risks and rewards are and how we are going to use it.

After the presentation, the following 2 subjects were proposed to the attendees:

- Risk and opportunities from the new technologies in the rental industry,
- Future of training in the rental industry (new generations, new technologies).



SUSTAINABILITY – How sustainability can help in promoting rental and in attracting people

After having presented the works of the Sustainability Committee, its Chairwoman, Franciska Janzon, joined by Anders Collman, Sustainability Director at Cramo Group, described the "Typical CSR model for a rental company".

The participants could choose between 2 questions:

- How CSR can help in promoting rental?
- What HR related KPIs can attract new generations?



*Presentations available on the ERA website,
www.erarental.org*



EUROPEAN RENTAL AWARDS



LARGE RENTAL COMPANY of the Year (turnover over €15 million)



WINNER >> Zeppelin Rental (Germany)



2016 was a stellar year for Zeppelin, with record revenues and profits and new initiatives, from eCommerce and training to marketing, new products and rental IT systems such as telematics.



SHORTLISTED >> Kiloutou (France)

Kiloutou managed growth both domestically and internationally and posted improved financial results.



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



WINNER >> Gomez Oviedo (Spain)



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



SHORTLISTED >> Huurland (Belgium)

Huurland is a 100% family owned company. Since 2007 the company has known a steady annual growth of more than 10% in a mature market, fed by continuous investments and a more proactive sales effort. 2016 revenues reached EUR 6.5 M. The company employs 45 people, in 9 locations throughout the Flanders region. In 2016 the management was further professionalized through the installation of an advisory board to broaden the vision of the family members and to help clearly define the company's growth path.



Small and Medium Rental Company of the Year (turnover under €15 million)



SHORTLISTED >> Maltech (Switzerland)

Maltech.ch has celebrated their 50th anniversary in 2016. The company is looking back on a long line of innovations, continuous push for new standards in the industry and the furthest developed MEWP / IPAF training program in Switzerland.

In 1966, Maltech was one of the first companies in Europe to introduce MEWPs in the industry. The former painting business thrived for modern machinery to make it easier, safer and more efficient.

Maltech.ch was one of the founders of the Swiss Rental Association VSAA and holds an important role in it, pushing industry standards for rental companies further.



SHORTLISTED >> Mol Lifting (the Netherlands)

Mol Lifting has been in the rental business for over 35 years and has transformed itself over the past years from a general plant hire company into a rental specialist. Vertical transportation of material and persons has always been a special activity within the company's scope.

The company is dedicated to providing the customer with good advice and excellent service and has continuously invested in high-quality equipment.



EMPLOYER INNOVATION AWARD



WINNER >>

Kiloutou (France)



From its share ownership's scheme to its staff induction programme, Kiloutou has shown that it has put its workforce at the very centre of its business and is an example of putting words into action.



SHORTLISTED >>A-Plant (UK)



A-Plant is one of the leaders in apprenticeship programmes in UK industry. During 2015 and 2016, A-Plant made its largest ever investment in apprentices, taking on 100 new trainees each year, of which a quarter were female. These apprenticeships covered a number of roles including fitters, drivers, hire controllers and customer service staff. In 2016 the company went on to provide over 5,000 training days to its employees.

SHORTLISTED >>HSS Hire (UK)



HSS Hire talked extensively to its existing employees to help shape its new recruitment initiatives.



RENTAL PRODUCT OF THE YEAR



HIGHLY COMMENDED AWARD >> JCB



This is the first time this award is given. It rewards an equipment supplier who, in the opinion of ERA's Technical Committee, has made significant efforts to design products that meet the specific needs and requirements of the rental industry.



WINNER >> Z-60/37FE boom (Genie)



Genie's Z-60/37FE boom is a true four-by-four hybrid machine designed for indoor and outdoor use and with low fuel consumption.





Rental product of the Year

SHORTLISTED >> 8 Series compressors (Atlas Copco)

Atlas Copco

**8 series
compressors**



The light weight of the 8 Series means that there is no need for any special driving license to tow the compressor. Every unit is below 750 kg including models with every option and even a built-in generator. The 8 Series reduces fuel consumption by an average of twelve per cent. The 8 Series is connected to the digital world by a simple QR code, which enables to search, find and ship the parts needed, from a phone or tablet in the field.

SHORTLISTED >> M50E compressor (Kaeser)

**KAESER
KOMPRESSOREN**

**M50E
compressor**



The combination of a portable construction compressor with an electric motor is unique in Europe. The main advantages compared to the conventional Diesel compressors are zero emissions at exceptionally economic and whisper-silent operation.

SHORTLISTED >> Hose-2-Go dust suppression and water supply product (Mtools - Makinex)



Hose-2-Go



The Hose 2 Go has a constant flow of water that allows to suppress the dust when cutting, core drilling and grinding concrete.



Rental product of the Year

SHORTLISTED >> Containerised Ramiflex accommodation unit (Ramirent)

RAMIRENT

Ramiflex
accommodation
unit



The unique expansion design provides lower costs for transport, storage and establishment. Each unit includes locker rooms, dining area, shower and toilet for twelve people. It takes less than 30 minutes to establish them, and all three cabins can fit on one truck with trailer.

SHORTLISTED >> X-Eco lighting tower (Trime)

TRIME

X-Eco lighting
tower



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



RENTAL SAFETY AWARD



WINNER >> A-Plant (UK)



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



SHORTLISTED >>Groundforce, part of VP plc (UK)



Groundforce has a new device for the safe handling of trench sheet piles.

SHORTLISTED >>Mtools-Makinex (the Netherlands)



Its Powered Hand Truck makes it easy for one person to handle loads of up to 140 kilograms.



DIGITAL INNOVATION AWARD



WINNER >>

Zeppelin Rental (Germany)



Zeppelin Rental has implemented a digital strategy spanning both its internal and customer-related functions, including the new Fast Rent online tool: having a digital strategy is obviously a must for any business today, and Zeppelin Rental is clearly ahead of the game, with well thought through programme addressing both its own needs and those of its customers.



SHORTLISTED >> Germans Homs (Spain)



Germans Homs has several digital initiatives including extensive use of bar codes and QR codes on its equipment and invoices. All of those have taken place in a challenging market, since the Spanish construction market has known a deep economic crisis.

SHORTLISTED >> HSS Hire (UK)



HSS Hire has made further developments to its fully transactional eCommerce website and to its services adapted for mobile devices.

SHORTLISTED >> Ramirent (Finland)



In 2016, Ramirent launched a new digital rental service, the RamiSmart concrete humidity monitoring system, which reduces humidity hazards on buildings and safeguards the construction process from humidity risks. The new rental service is a remote monitoring system for real-time measuring the drying process of concrete on a construction site. The system informs of humidity and temperature development and shows how the trend of the drying process is progressing.



The ERA / IRN RENTAL PERSON of the Year

WINNER >> Gérard Déprez (Loxam)



In 2016/17, Gérard Déprez has reinforced his status as one of the leaders in the world's equipment rental industry, and especially so in his home market of Europe. Those 12 months have seen Loxam's annual revenues exceed 1 billion Euros, a moment that seals its status as Europe's biggest general rental player.

Under Gérard's leadership, Loxam has made some bold and successful moves: such as acquiring Hune, one of the top two rental businesses in Spain. But most of all, the recent period will be remembered for the acquisition of Lavendon, Europe's largest aerial platform rental business. That one deal transforms Loxam's international business and give it a dominant place in Europe's access market and in the Middle East.

Gérard Déprez has enjoyed an illustrious career in the rental business, not least as the first president of the ERA, but, even in that unique career, 2016/17 will stand out.



LIFETIME ACHIEVEMENT AWARD

WINNER >> Ray Caulfield



Ray Caulfield is a true veteran of the equipment rental industry and has been involved for 52 years in the rental industry, with product development and sales being his touchstones.

He was at the forefront in developing products for the rental industry, with a particular expertise in specialised concreting equipment. That expertise led him to become an expert on product sales much sought after by rental companies around the world. One such training assignment, with A-Plant several decades ago, led him to becoming the company's director of operations in London. He soon returned to product sales, however, where he also pioneered the development of environmentally-friendly products – long before it became fashionable. He started as a diesel engine fitter at John Brown, a contractor, and subsequently enjoyed careers and senior roles at companies including Errut Products, GenSet plc, TowerLight UK and Generac. Last year he considered retirement, but returned to the industry when he accepted the position of Group CEO of Trime, the new Italian lighting tower supplier.



EUROPEAN
RENTAL
ASSOCIATION

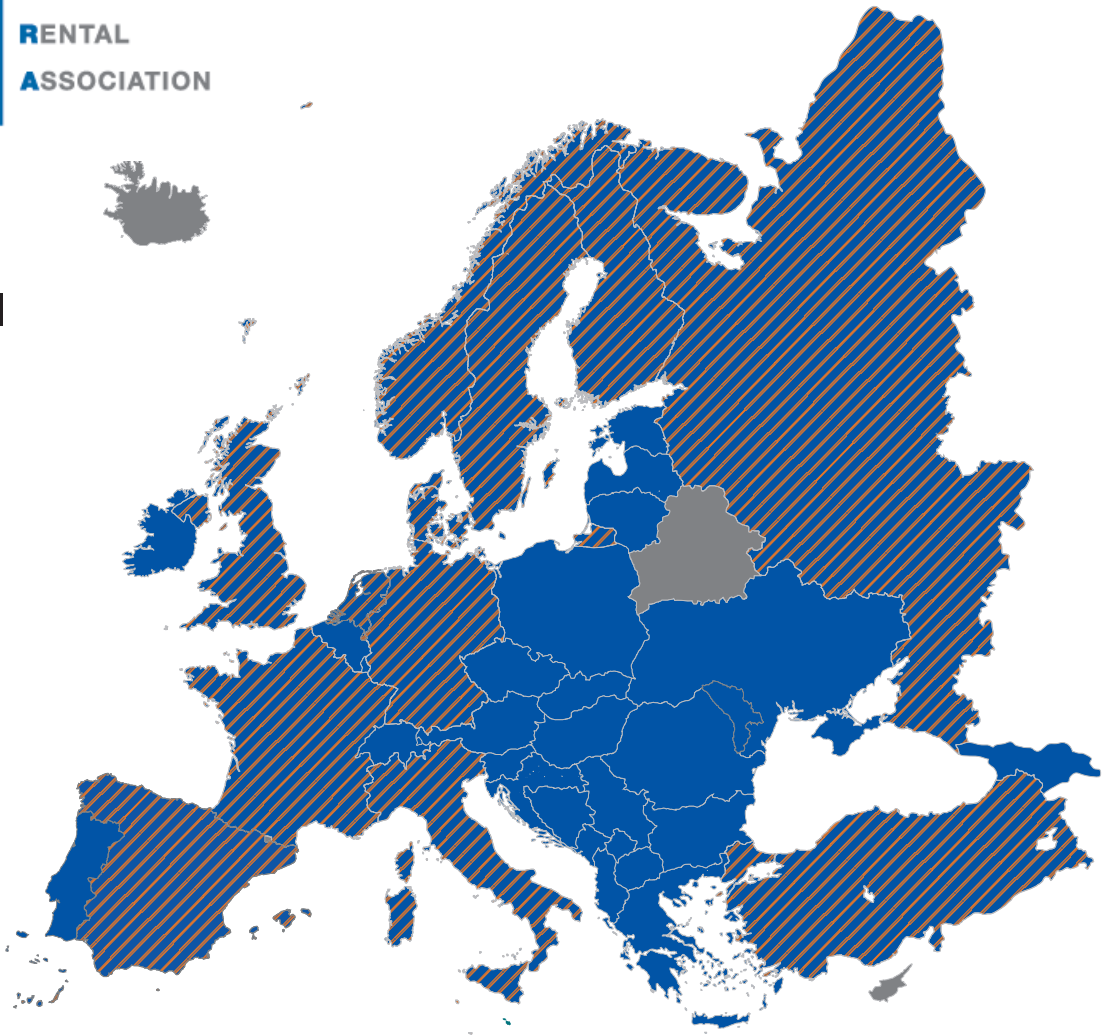
LEGEND



National Rental
Association +
Individual companies



Individual companies



ERA MEMBER COMPANIES OPERATE IN ALMOST ALL COUNTRIES IN EUROPE

Find out which companies operate in your country at www.erarental.org

ERA MEMBERS (as of August 2017)

DENMARK / Danish
Rental Association

FINLAND / TKL

FRANCE / D.L.R.

GERMANY / BBI

ITALY / ASSODIMI

NORWAY / Norwegian
Rental Association

RUSSIA / NAAST

SPAIN / ANAPAT / ASEAMAC

SWEDEN / Swedish
Rental Association

TURKEY / IMDER

UNITED KINGDOM / HAE

INTERNATIONAL ASSOCIATION /
IPAF

ERA MEMBERS: RENTAL COMPANIES (as of August 2017)

BELGIUM /

Atlas Copco Portable Air
TVH

Wim Verhuur

BULGARIA /

Stroyrent

CZECH REPUBLIC /

Johnny Servis

FINLAND /

Cramo

Ramirent

FRANCE /

Acces Industrie

Chambault

Kiloutou

Loxam

GEORGIA /

Georent

GERMANY /

ADCO

HKL Baumaschinen

Jungheinrich

Liebherr Mietpartner

Wacker Neuson

Zeppelin Rental

ITALY /

Nacanco

Venpa

PORTUGAL /

Machrent

MSR – Aluguer de Maquinas e

Equipamentos

SPAIN /

Germans Homs

HUNE

SWITZERLAND /

Avesco

THE NETHERLANDS /

Aerzen International Rental

Boels Verhuur

Bredenoord Aggregaten Verhuur

Energyst

Peinemann Holding

Riwal Hoogwerkers

UNITED KINGDOM /

Ashtead Group

GAP Group

HSS Hire

Lavendon Group

Red-D-Arc Welderentals

VP PLC

ASSOCIATE MEMBERS

Altrex

Ammann France

Annata

Armada Dynamics

Atlas Copco Portable Air

ATN

BBA Pumps

Brendon Powerwashers

CASE Construction Equipment

Caterpillar

Containex

Dagico Software

Dantherm Air Handling

Datatag ID

DEIF

Doosan Benelux

Euro Auctions

Eurogate International

Firefly

GENERAC

Genie Europe

Haulotte Group

Hilti

Hinowa

Hitachi Construction Machinery

inspHire

IronPlanet

JCB

JLG Industries

Kaeser Compresseurs

KHL Group

Klickrent

Leica Geosystems

Liebherr France

Manitou

NJ Froment

Ritchie Bros. Auctioneers

Roesler Software Technik

Skyjack UK

Smartequip

Snorkel

Sumner Manufacturing

Swepac

Sycor

TORO Europe

Trackunit

Volvo CE Europe

Wacker Neuson

Wynne Systems

XCMG

Yanmar

AVAILABLE OCTOBER 2017!

Get the most comprehensive data available on
the European Rental Industry

The **ERA Market Report 2017** gives you the most comprehensive data currently available on the European Rental Industry.

The Report contains a country-by-country analysis over 15 European countries **detailed market size information for the years 2013-2016** and key ratios among which fleet size and investment as well as penetration rates.

As in the 2016 report, a summary of the USA rental market will be presented.

Find out what to expect of the Rental Industry in each country with the 2018 forecasts!



If you would like to get
your copy, please contact
the European Rental
Association by email on
era@erarental.org

graphic & book design ALIAS2K.COM



EUROPEAN
RENTAL
ASSOCIATION