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EUROPEAN
RENTAL
ASSOCIATION

Back to basics.

Why do we have a statistics committee?

Committee Report – Statistics

Workshop – ERA June 2006 convention Outcome

The mission of the statistical committee is the identification of key parameters to be considered for the collection of statistics of the European rental market. Including: the definition of the rental sector, key data to be collected, geographical scope and mechanisms for the collection.

How big is Europe's Rental Market?

RENTAL MARKET in EUROPE

The European Equipment Rental Industry 2008 Report

Key Findings of the report:

In 2008 Total Size of Rental Market → €33,6 billion

including → €24,4 billion in rental without operators

→ €9,2 billion in rental with operators

Written by Murray Pollok - 07 Apr 2010



The ERA/IRN RentalTracker survey for the first three months of 2010 shows a continuation of the positive trend in business confidence revealed in previous surveys, with more positive views on current business conditions and improving utilisation.

The European Equipment Rental Industry 2009 Report

- Thanks to all the Committee Members
 - New members welcome
 - The report is available at €300 to members (buy it!)
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Top-line figures

- 2009 €20.2 bn (without operator) in EU + EFTA
- compares to €24.4 bn in 2008
- 14,900 rental companies in the 11 countries studied
- 123,000 employees in the 11 countries studied
- 21,500 depots in the 11 countries studied

Over to Michel Petitjean for more reports

The European Equipment Rental Industry 2009 report

ERA Convention 2010 - **“New Opportunities for Rental”**

Some changes from the 2008 report:

- **European figures incorporate the remaining EU27 + EFTA countries based on an industry best estimate.**
- **The country overview is expanded to four pages by country with figures in local currency**
- **The figures in the European overview are in Euros.**

The European Equipment Rental Industry 2009 report

ERA Convention 2010 - “New Opportunities for Rental”

Some changes from the 2008 report:

- **New Keys Indicators with the release of:**
 - **Value of the rental fleets**
 - **Investments in rental equipment.**
- **This report will not consider penetration rates on equipment sales and on equipment population.**
 - Rates are very complex to define and calculate.
 - Dramatic levels of sales in 2009/2010 and major “defleeting” would make these rates meaningless.

The European Equipment Rental Industry 2009 report

ERA Convention 2010 - “New Opportunities for Rental”

Some changes from the 2008 report:

- For clarity purpose, this report will consider mostly equipment rental without operators.
 - The equipment rental with operators is more diversified and needs more definitions and consensus.
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The European Equipment Rental Industry 2009 report

ERA Convention 2010 - "New Opportunities for Rental"

In 2009

**TOTAL SIZE of the European equipment rental market
(without operators) → €20.2 billion.**

This compares with the peak of €24.4 billion in 2008

Decrease 2009/2008 → - 17,2 %

(ranging from Germany at - 5% to Spain at - 35%)

The European Equipment Rental Industry 2009 report

ERA Convention 2010 - "New Opportunities for Rental"

In 2010

Rental turnover expected to decrease

→ **between 0% and -5% from country to country**
(with the exception of one country, Spain, with - 20%)

In 2011

Rental turnover expected to increase

→ **between 0% and 10% from country to country.**

The European Equipment Rental Industry 2009 report

ERA Convention 2010 - "New Opportunities for Rental"

In 2009

Fleet investment reduced drastically in some countries

→ up to 80% to 90% decrease from 2008 levels

**In other countries, capital expenditure was less affected
with reductions of 20% to 25%.**

Fleet sizes evaluated for the first time in this 2009 report.

→ reduced from 14% to 17% in some countries

In other countries, the fleet sizes remained virtually constant.

The European Equipment Rental Industry 2009 report

ERA Convention 2010 - "New Opportunities for Rental"

In 2009

Great differences in penetrations:

- In Construction Industry penetration

Europe average → 1,60% (mini 0,75% to maxi 4,10%)

- In Country population penetration

Europe average → 51 €/person (mini 24 to maxi 138)



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Thank-you.