



EUROPEAN
RENTAL
ASSOCIATION

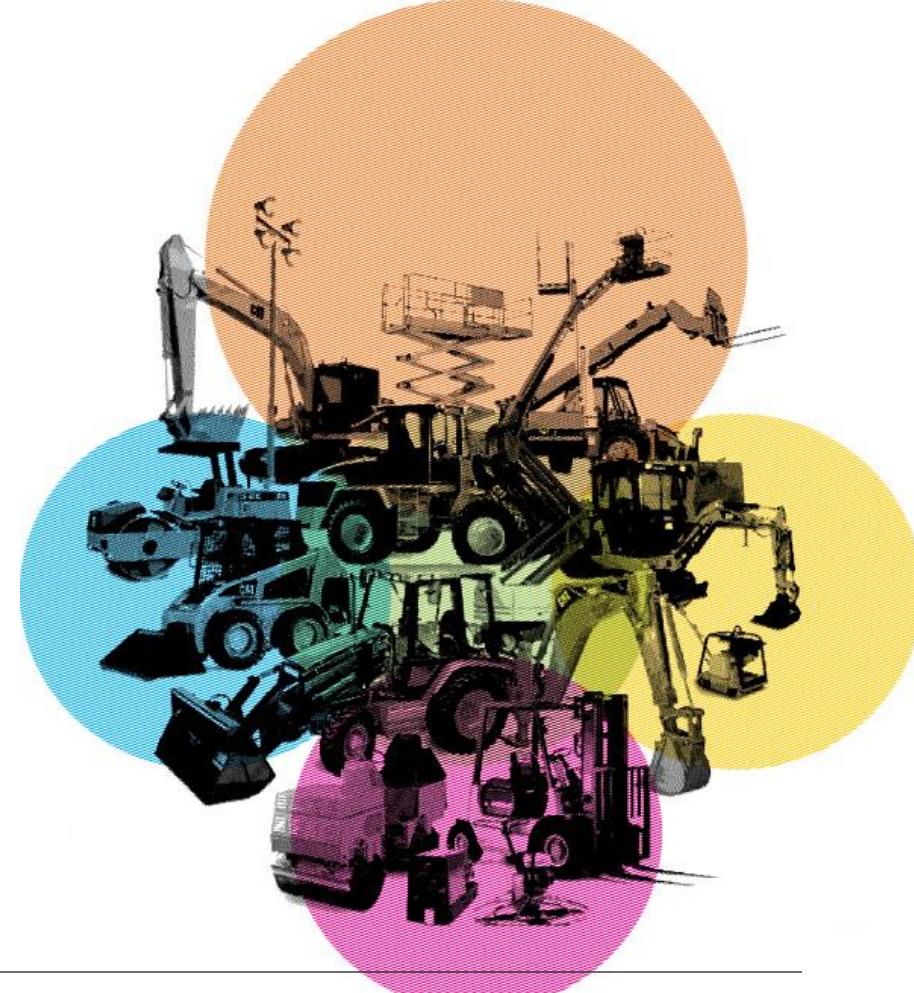
Trends in the European Equipment Rental Market

Michel Petitjean

ERA Secretary General



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ERA Convention 2017, "HOW TO SECURE TALENT FOR THE FUTURE", Amsterdam, 02 to 04 May

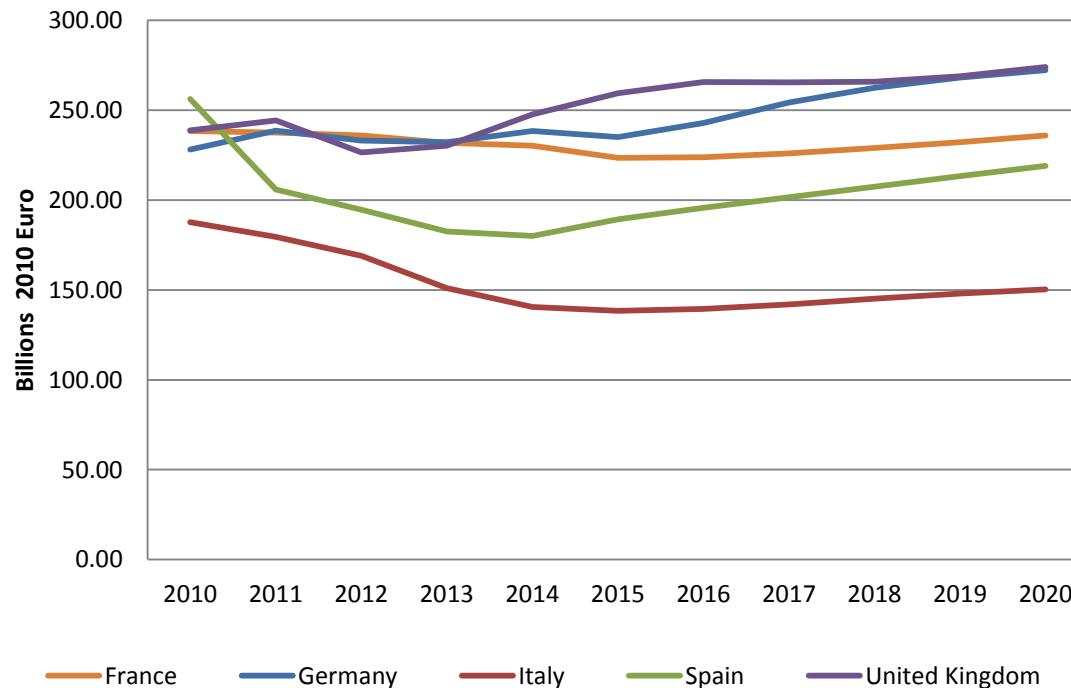
Contents

Macro Trends on Construction and Rental Markets

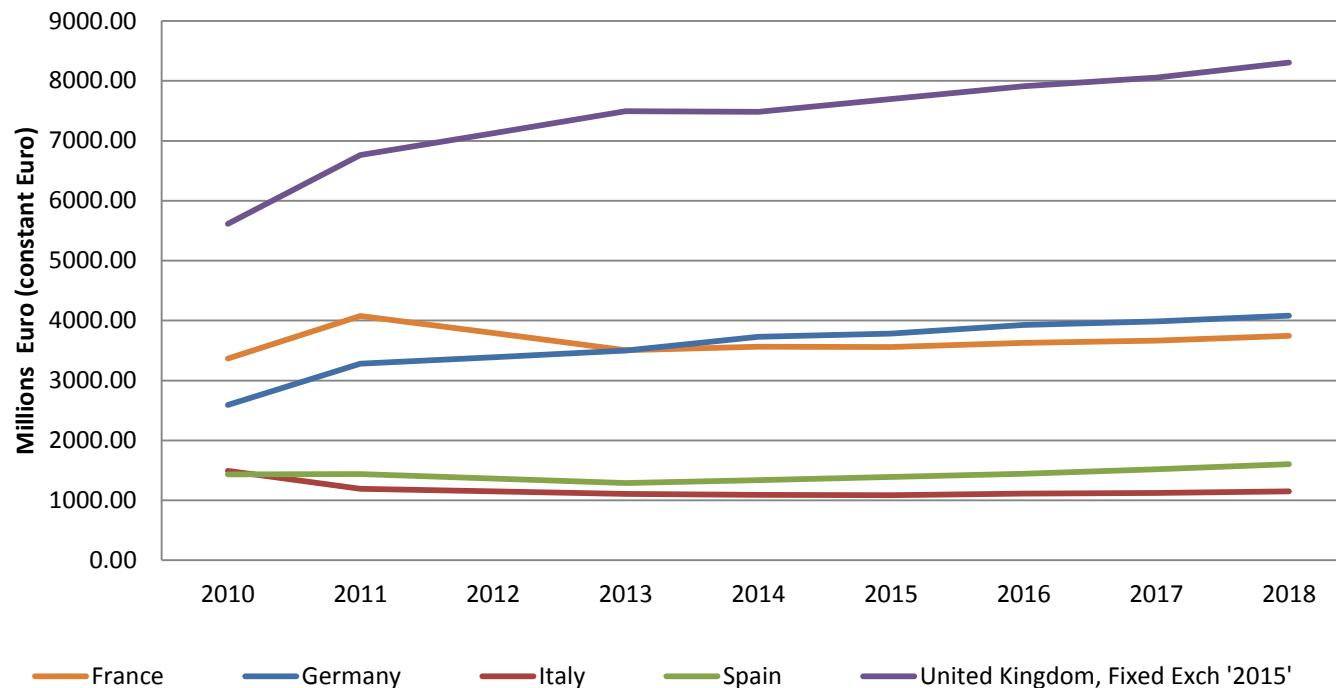
ERA Market Report 2016 Highlights

Rental Tracker Q1 2017

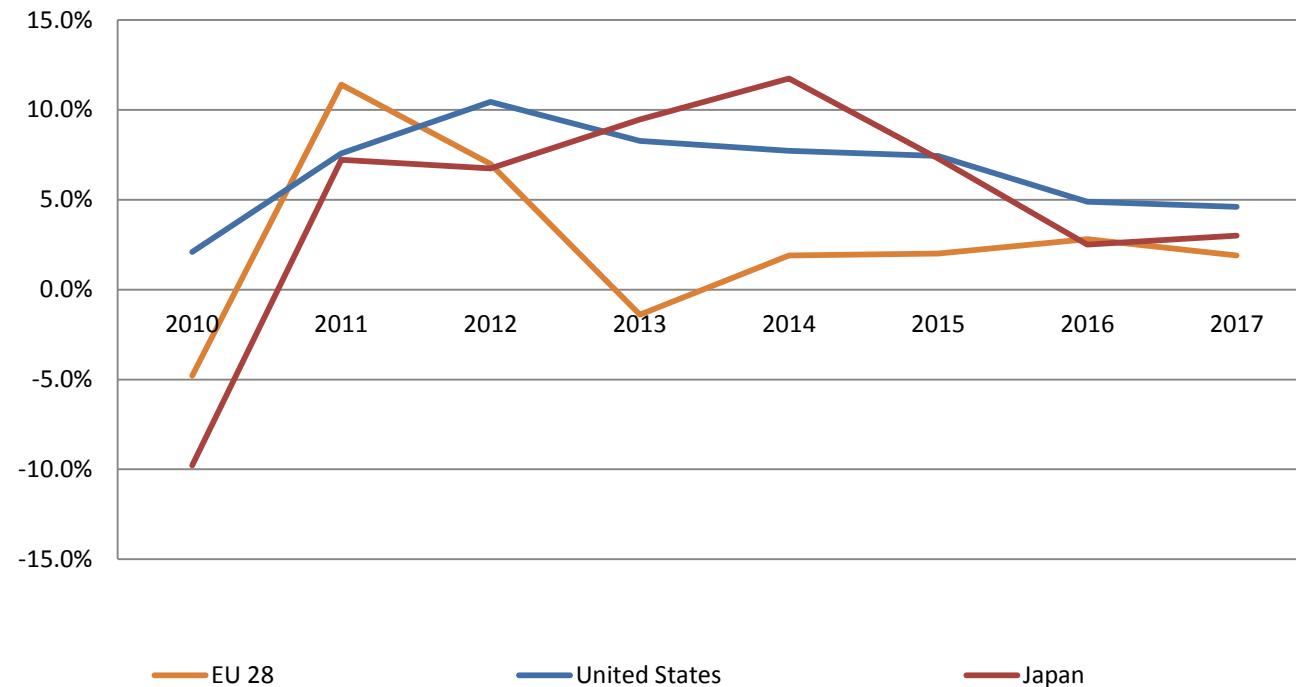
Long term trends - Main European construction markets



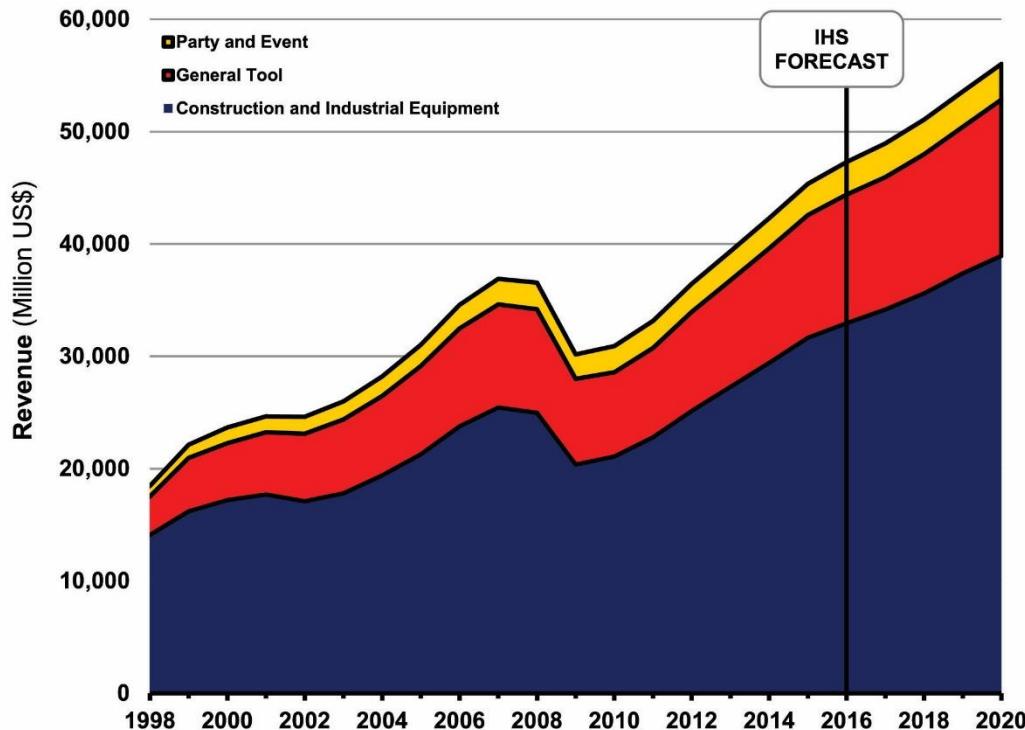
Long term trends – Main European rental markets



Long term trends - Main world rental markets (% growth)



United States Rental Revenue



Source: **ARA Rental Market Monitor™**

ERA Market Report 2016 Highlights

- In the EU28, **Total Rental Turnover of €24.29 Bn in 2015**, an **increase in value of 2.0% over 2014** at constant exchange rate
- In 2016, the estimate is showing growth with an **average increase of 2.8% over 2015**, and in 2017 an average **increase of 1,9% over 2016**, both at constant exchange rate

Forecast of (nominal) rental revenue growth per country 2017

	ERA 2016 Report (Sept 2016)	Convention Update	Difference (2017 update - ERA 2016)
Countries	2017	2017	2017
Austria (AU)	1,5%	2,6%	1,1
Belgium (BE)	0,9%	1,7%	0,8
Czech Republic (CZ)	4,5%	5,0%	0,5
Denmark (DK)	2,2%	2,9%	0,7
Finland (FI)	2,6%	3,1%	0,5
France (FR)	1,1%	1,8%	0,7
Germany (DE)	1,5%	2,7%	1,2
Italy (IT)	0,9%	1,7%	0,9
Netherlands (NL)	3,2%	4,1%	1,0
Norway (NO)	2,1%	2,2%	0,1
Poland (PL)	1,5%	2,7%	1,2
Spain (ES)	5,1%	5,7%	0,5
Sweden (SE)	1,3%	2,6%	1,3
Switzerland (CH)	1,7%	2,5%	0,8
United Kingdom (UK)	1,9%	2,2%	0,3
EU28EFTA*	0,3%	1,2%	0,9

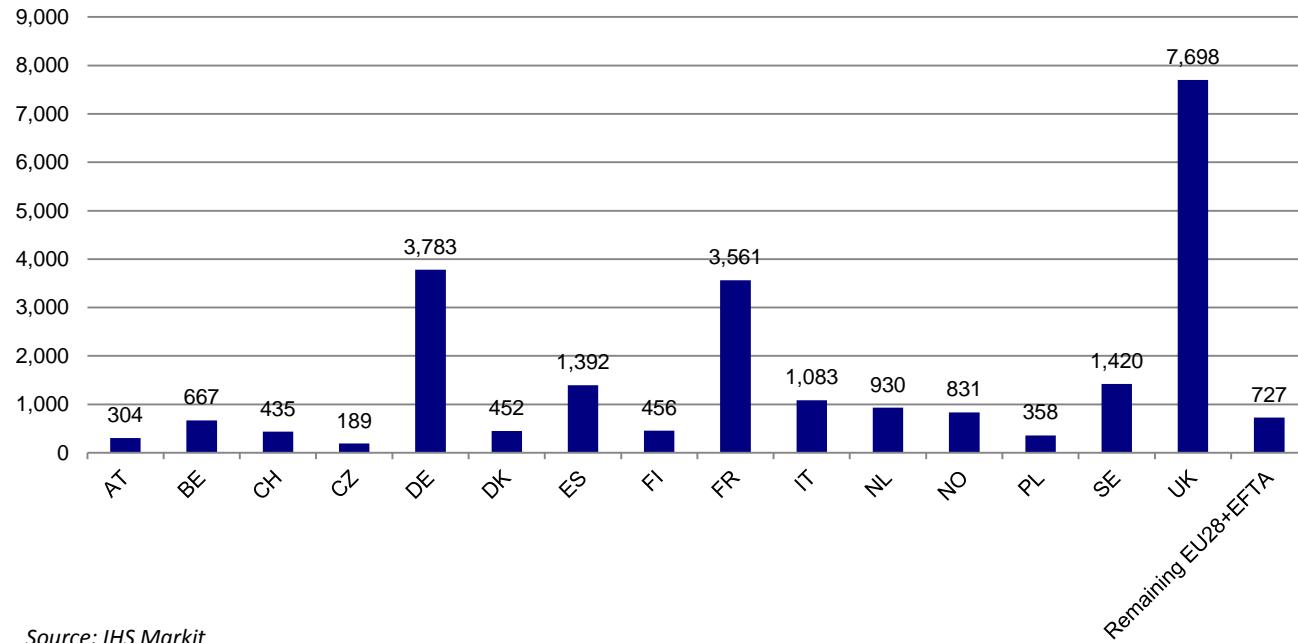
* This figure is based on the EUR numbers of the countries and reflect the steep depreciation of the British Pound

Forecast of (nominal) rental revenue growth per country 2018

	ERA 2016 Report (Sept 2016)	Convention Update	Difference (2017 update - ERA 2016
Countries	2018	2018	2018
Austria (AU)	3,2%	3,8%	0,7
Belgium (BE)	1,9%	2,8%	0,9
Czech Republic (CZ)	4,8%	5,5%	0,7
Denmark (DK)	2,8%	3,0%	0,2
Finland (FI)	2,2%	2,5%	0,3
France (FR)	2,2%	2,7%	0,5
Germany (DE)	2,4%	3,3%	0,9
Italy (IT)	2,4%	3,4%	1,0
Netherlands (NL)	4,6%	5,1%	0,5
Norway (NO)	3,5%	4,3%	0,8
Poland (PL)	3,0%	3,8%	0,8
Spain (ES)	5,7%	6,1%	0,4
Sweden (SE)	2,8%	3,6%	0,8
Switzerland (CH)	3,2%	3,6%	0,4
United Kingdom (UK)	3,1%	3,2%	0,1
EU28EFTA*	2,9%	3,5%	0,5

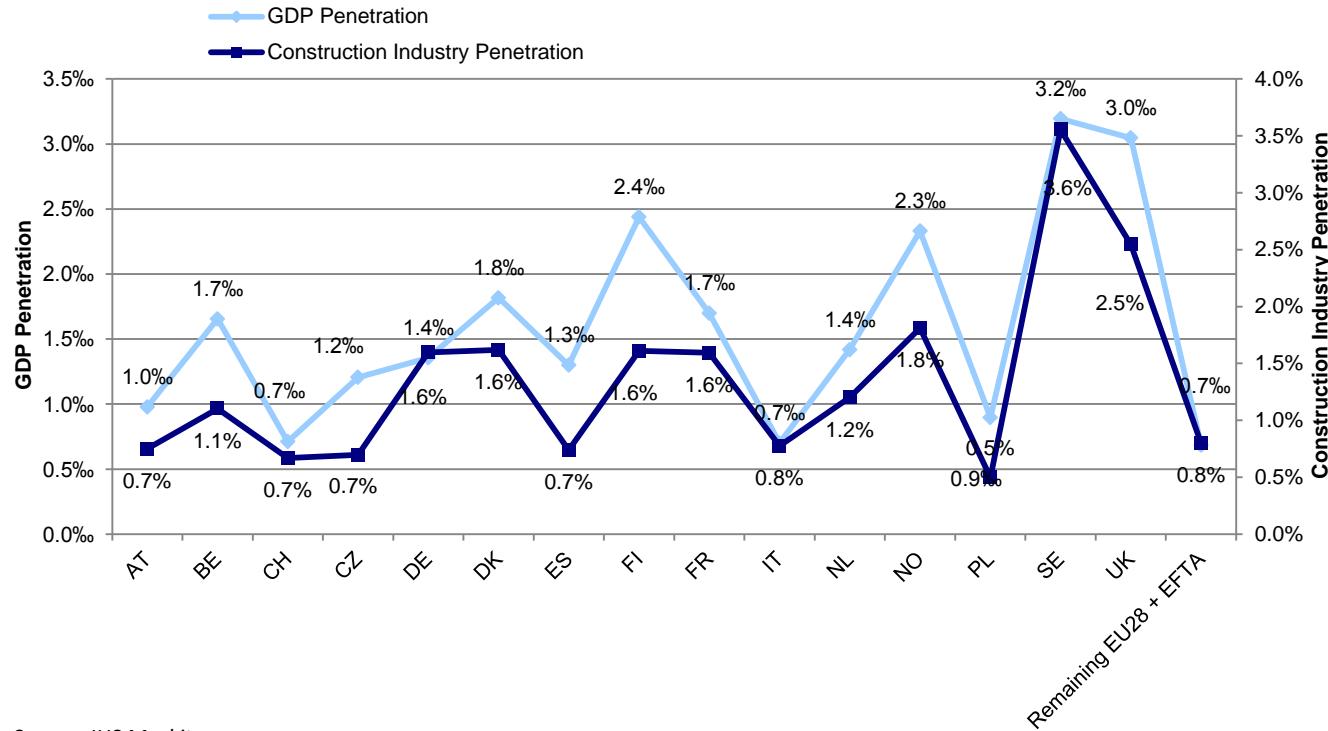
* This figure is based on the EUR numbers of the countries and reflect the steep depreciation of the British Pound

Total Rental Turnover 2015 by Country (in million €)



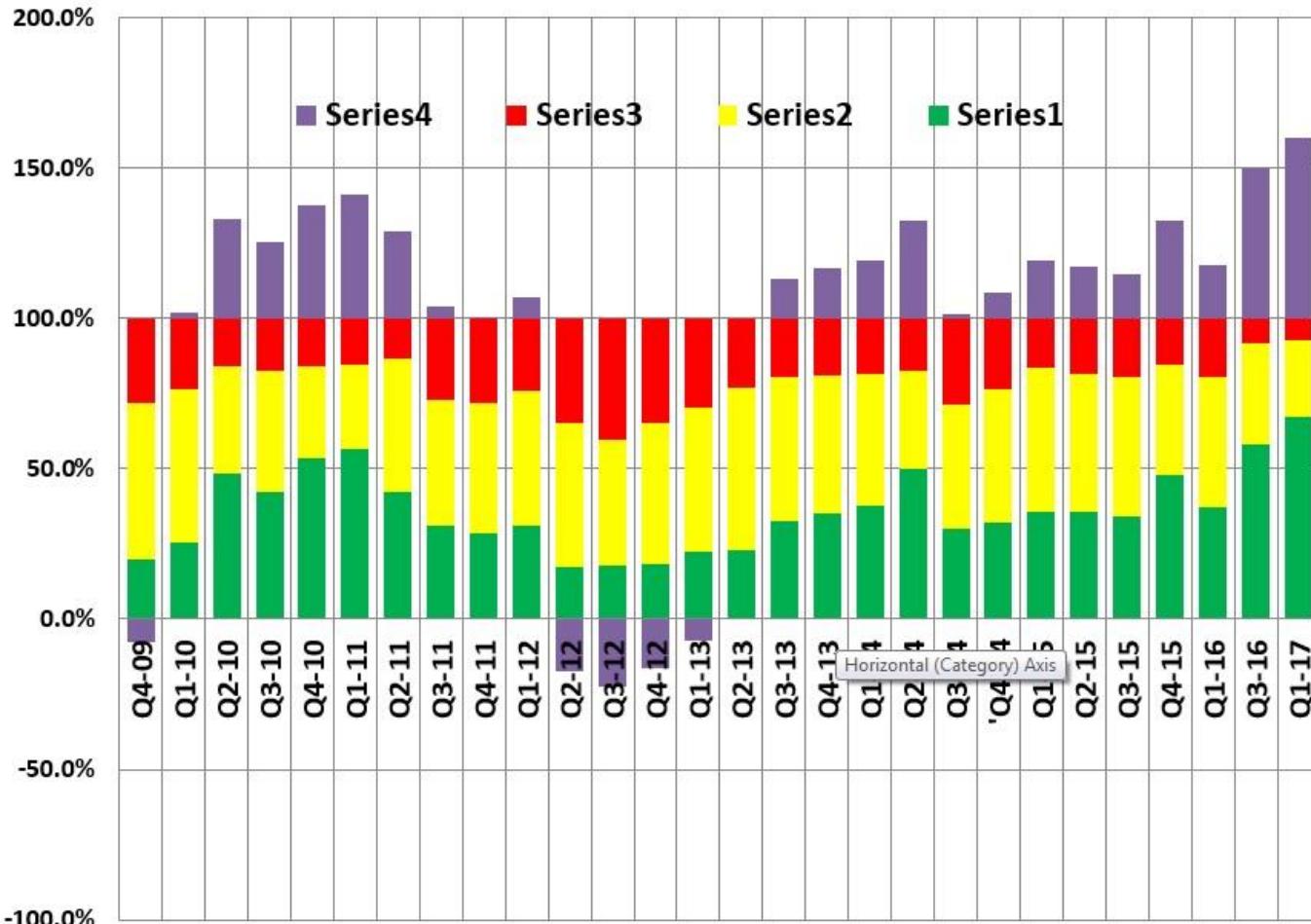
Source: IHS Markit

Penetration Rates 2015 against GDP and/or Construction



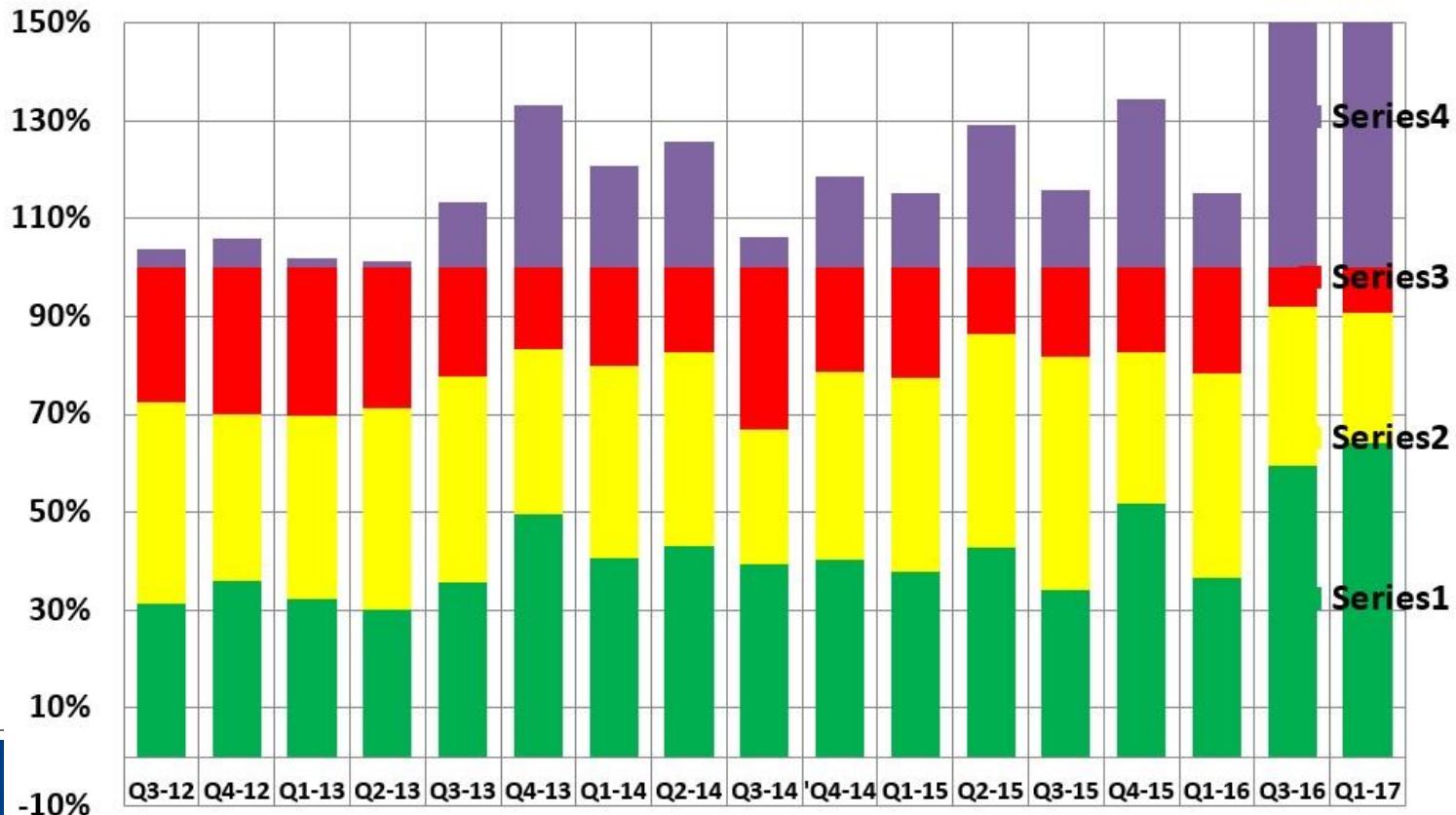
Source: IHS Markit

Europe: Business conditions now

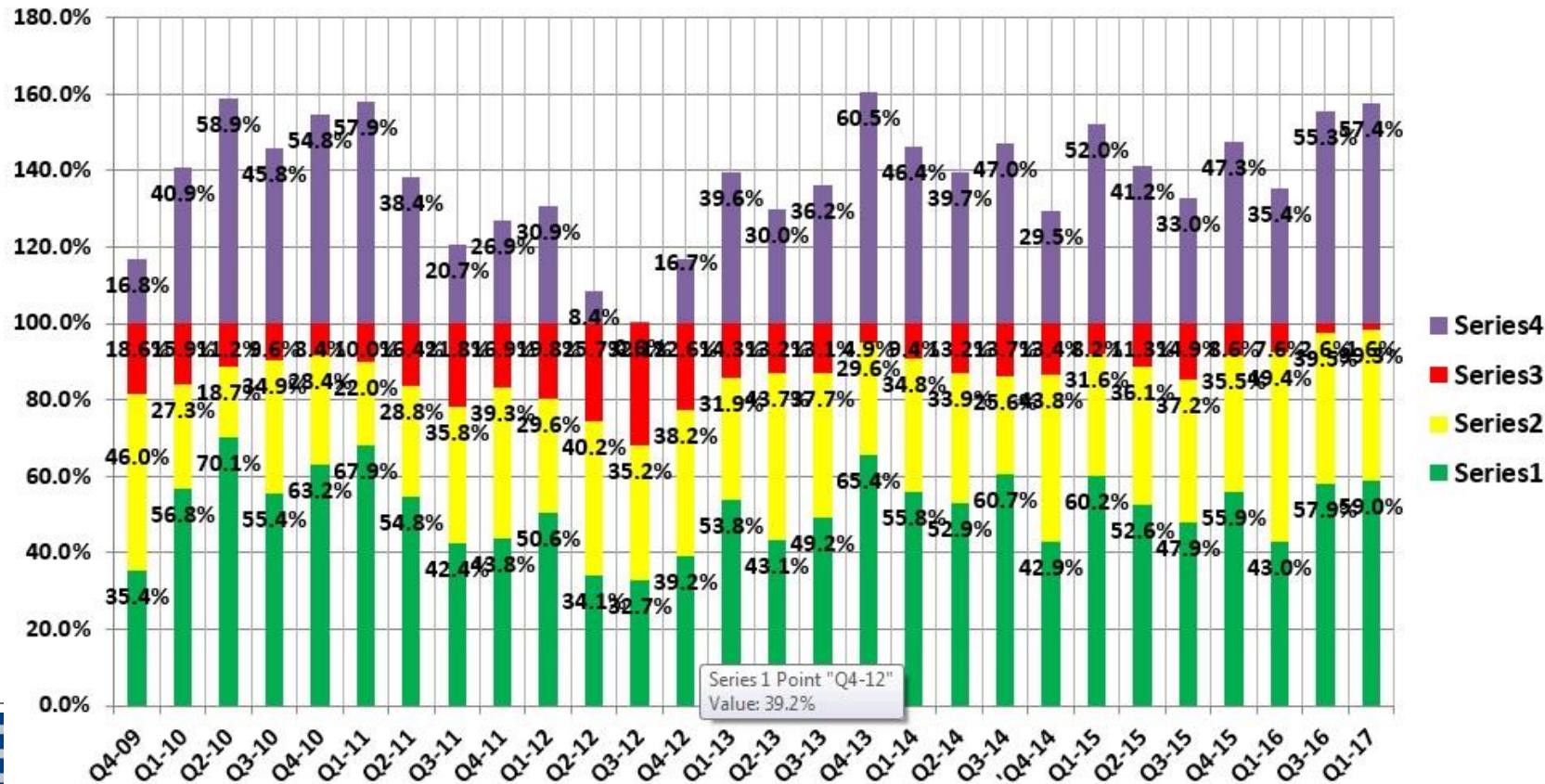


Europe: Quarterly activity

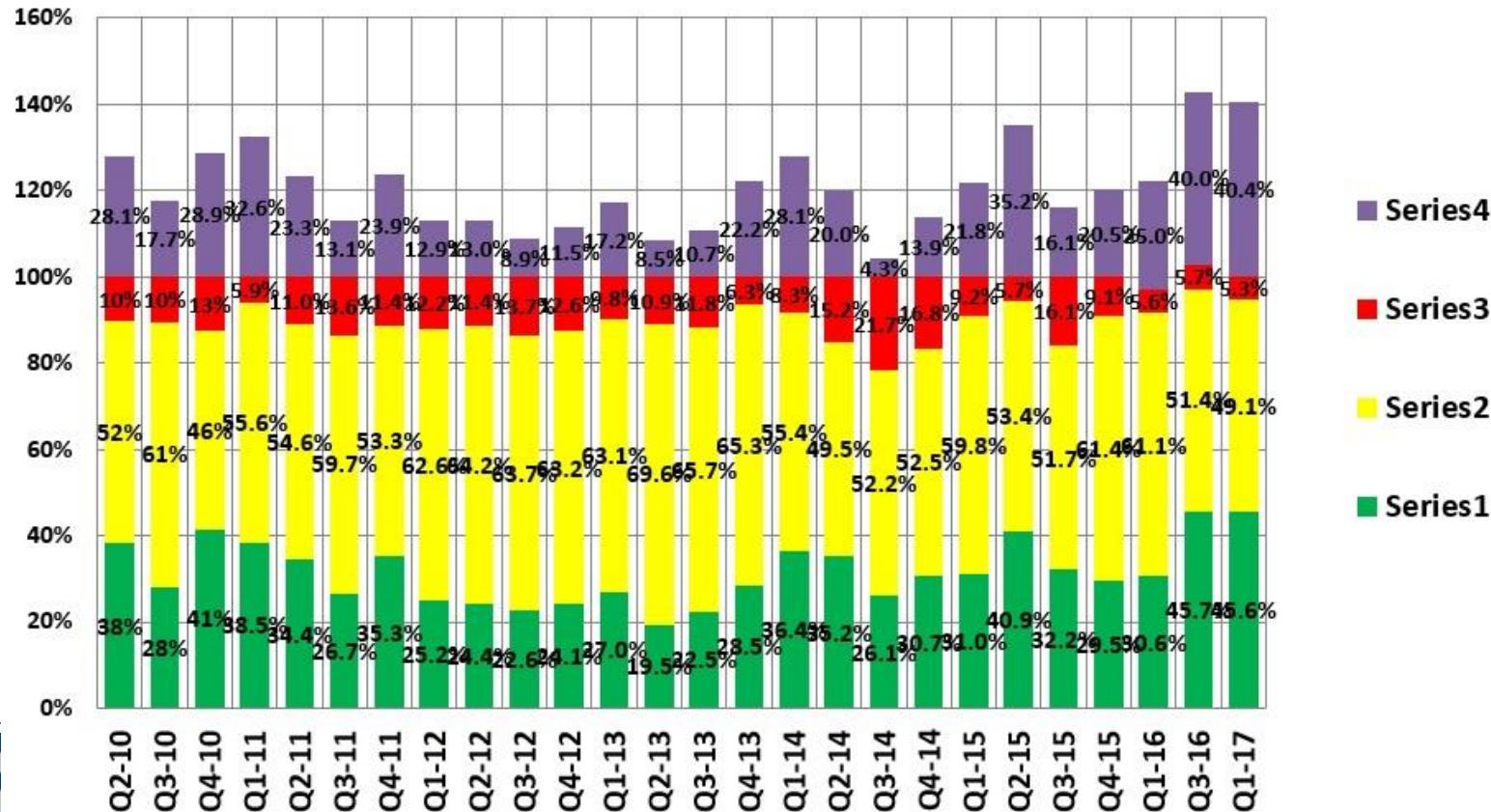
year-on-year



Europe: expectations for year from now



Europe: Employment intentions for the next quarter



May

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Thank You !

Questions ?