INTERNATIONAL rental NEWS

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IRN 100

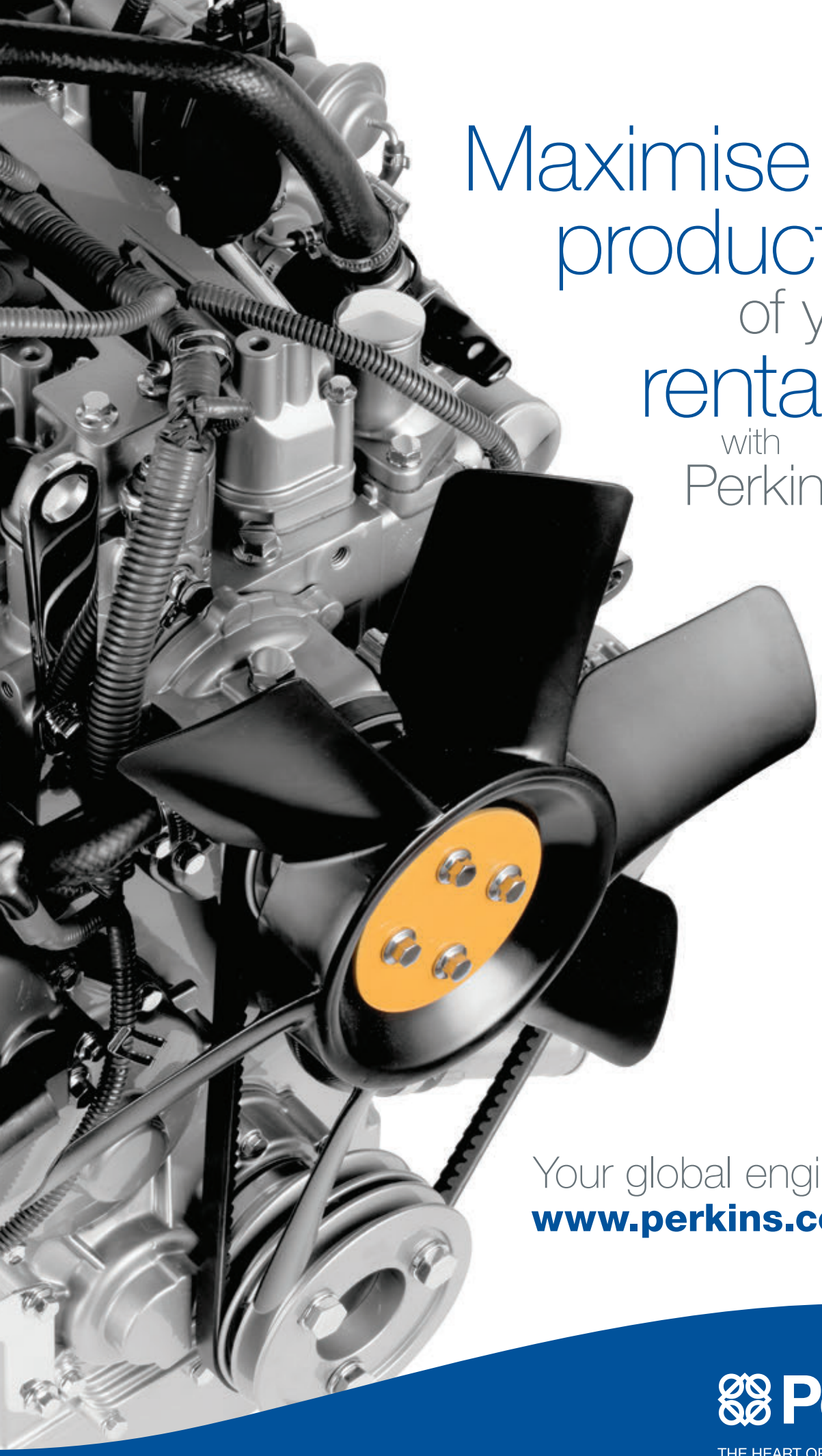
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Ranking the World's top 100 rental companies

Official magazine of the ERA

EUROPEAN RENTAL ASSOCIATION

INSIDE: EUROPEAN RENTAL AWARD WINNERS; LATEST ERA/*IRN* RENTALTRACKER



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INTERNATIONAL rental NEWS
June 2016
Volume 16 Issue 4

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comment

An industry worth celebrating



Welcome to the June issue of *International Rental News* – containing our flagship feature, the IRN**100** ranking of the largest rental companies in the world. Revenues for these 100 companies grew 5% year-on-year in 2015, fuelled by strong momentum in US rental markets.

The IRN**100** companies certainly worked hard in 2015 to change and expand amid unpredictable global markets. Headwinds impacting the global rental industry in 2015 included the oil and gas crisis, over-fleeting, currency volatility and tough competition. Turn to page 26 for the full table and analysis.

IRN is always on the look-out for new entrants to the IRN**100**, so if your company is not listed in this year's ranking but you feel it should be, please contact me (Helen.Wright@khl.com) with your company data.

Meanwhile, the winners of the 2016 European Rental Awards were announced during the European Rental Association Convention in Stockholm, Sweden.

The prestigious European Rental Awards took place on 8th June at the Hotel Clarion Sign, and comprised six categories, including a new award for Sustainable Business Innovation in Rental.

IRN would like to thank all the companies and individuals that submitted entries to the awards – the standard was very high, as was the volume of entries. Fifty-seven entries were received in total for the awards, including eight for the new sustainability category and 35 alone for the rental product of the year award.

The winning entries demonstrated how carefully the rental industry listens to what its customers are requesting – both the supplier side of the market and the rental companies themselves. Turn to page 24 for a full list of the winners, and the judges' comments.

Enjoy the read!

Helen Wright
Editor
International Rental News



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www.khl.com/rentalawards

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www.khl.com/rentaltracker

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DIARY DATES

2016

HILLHEAD 2016
June 28-30, Buxton, UK
www.hillhead.com

EUROPLATFORM 2016
September 22, Vienna, Austria
www.europlatform.info

***ALH* CONFERENCE**
October 11, Miami, USA
www.khl.com/alh-ca

THE SHOWMAN'S SHOW
October 19-20, Newbury, UK
www.showmans-directory.co.uk

CEMAT ASIA
November 1-4, Shanghai, China
www.cemat-asia.com

INTERNATIONAL RENTAL CONFERENCE (IRC) ASIA
November 21, Shanghai, China
www.khl.com/irc

BAUMA CHINA
November 22-25, Shanghai, China
www.bauma-china.com

2017

EXECUTIVE HIRE SHOW
February 8-9, Coventry, UK
www.executivehireshow.co.uk

SAMOTER 2017
February 22-25, Verona, Italy
www.samoter.com

THE RENTAL SHOW
Feb 26 - March 1, Orlando, USA
www.therentalshow.com

CONEXPO-CON/AGG 2017
March 7-11, Las Vegas, USA
www.conexpoconagg.com

INTERNATIONAL AWARDS FOR POWERED ACCESS (IAPAS)
April 4, London, UK
www.iapa-summit.info

APEX (INTERNATIONAL ACCESS EQUIPMENT EXHIBITION)
May 2-4, Amsterdam, Netherlands
www.apexshow.com

INTERNATIONAL RENTAL EXHIBITION (IRE)
May 2-4, Amsterdam, Netherlands
www.IREshow.com

EUROPEAN RENTAL AWARDS
May 3, Amsterdam, Netherlands
www.khl.com/rentalawards

Terex Zoomlion talks terminated

Zoomlion has abandoned its plans to acquire US crane and construction equipment manufacturer Terex Corporation. The Chinese company said in its statement, "although the parties to the transaction have made their joint efforts to closely negotiate on the proposed transaction recently, no agreement can be reached on the crucial terms. The company therefore decided to terminate the negotiation in relation to the proposed acquisition of Terex."

The statement went on to say that Zoomlion "will continue to seek strategic opportunities for its long-term development, and further procure its strategic transformation and industrial upgrading."

Following termination of Zoomlion's bid to acquire Terex Corporation, the previously announced acquisition of the Terex port crane business by Konecranes will now proceed.

The US$1.3 billion (€1.5 billion) deal for the Terex Materials Handling and port Solutions (MHPS) business is expected to close in January 2017.

John Garrison, Terex president and chief executive officer, said, "The sale of the MHPS business to Konecranes will now proceed."

Mr Garrison continued, "The proceeds will significantly reduce Terex's debt levels and improve our balance sheet, providing us with the ability to buy back shares and invest in our remaining businesses. As a 25 % shareholder of Konecranes, Terex will be able to share in the synergies and economic upside of the combined MHPS and Konecranes businesses."

HIGHLIGHTS

■ The American Rental Association's has moderated its forecast for the US rental market to 5.6% growth in 2016, followed by 4.9% growth in 2017. The previous forecast (complied by IHS) was for 6.6% growth in 2016 and 5.6% in 2017. It said total rental revenues in the US – including revenues from the construction, industrial, general tool, and party and events sectors – were now expected to reach US$47.9 billion (€41.4 billion) this year, climbing to US$55.6 billion (€48 billion) in 2019.

■ Private equity firm Apollo Global Management is to acquire AmQuip Crane Rental and Maxim Crane Works and merge the two. Together the companies will represent a fleet of close to 2000 cranes, based on 2015 data from *IRN* sister publication *American Cranes & Transport's* **ACT**100 list of top crane owners in North America.

■ The new layout for the Intermat exhibition (April 23 to 28, 2018, in Paris, France) does not use Hall 7, but Halls 3 and 4 come into play. Along with its international flavour, the show will have a focus on France, Africa and the Middle East.

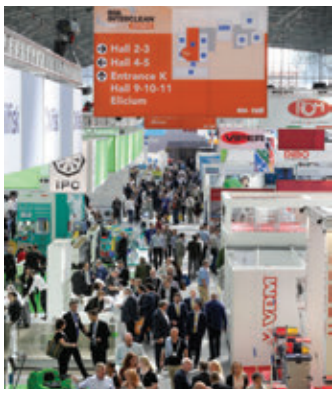
■ Manufacturer Manitou has opened a 900m² Manitou Centre in Sungai Buloh, Malaysia. The company said it wanted to double the capacity of its operations in the country within three years, and triple the number of telescopic handlers, reaching a 50% market share in this segment.

Interclean success

Over four days, a total of 30289 professionals from 134 countries visited the ISSA/Interclean exhibition Amsterdam, the Netherlands.

The professional cleaning industry show took place from 10th to 13th May at the Amsterdam Rai, boasting over 800 exhibitors covering everything from consumables to large street sweepers and industrial cleaning equipment.

Large players were represented, including Kärcher, Comac, Hako, Herray Machinery, Maer and TVH.



European Rental Award winners announced

Netherlands-based access rental specialist Riwal has won the Large Rental Company of the Year award in the European Rental Awards, which were held on 8th June in Sweden. For a full list of award winners as well as comments from the judges, turn to page 24.



UK-based rental company Groundforce has supplied bracing beams and hydraulic struts to support a tunnel project in Scotland. If you are reading the tablet edition of the magazine, click on the image to view a slideshow of images from this project. Utilities company Scottish Water is building a 5km waste water tunnel in the south of Glasgow as part of the biggest upgrade of the city's waste water network in more than a century. The 4.7m diameter Shieldhall Strategic Tunnel is under construction by Costain Vinci JV, and Groundforce was awarded the rental contract to provide the temporary support for part of the tunnel. Modular Megabrace beams with MP125 hydraulic props were used.



HIGHLIGHTS

- UK rental company Vp has acquired Australian test and measurement specialist TR for AU$17.4 million (€11.5 million). TR operates from 13 locations in Australia, New Zealand and Malaysia.
- Australian online rental database iSeekplant has been 25% acquired by Seven Group Holdings, which is also a majority investor in Australian rental company Coates Hire. iSeekplant has almost 3500 suppliers on its platform, and nearly 100000 users per month.
- Skyjack has partnered with Fimatec Equipment to distribute its products in Brazil. Initially a forklift specialist, rental company Fimatec, based in Rio de Janeiro, it acquired its first Skyjack scissor in 2013.

New concept for IRE 2017

The 4th International Rental Exhibition (IRE) returns to Amsterdam and the RAI exhibition centre in 2017, but with a fresh approach and a new exhibition hall - the recently opened Amtrium.

Held from 2nd to 4th May 2017, IRE will again take place in co-operation with the European Rental Association (ERA), which will hold its convention on the same three days, along with the European Rental Awards. IRE will also co-locate with the well-established APEX aerial platform exhibition.

Holding IRE in the new Amtrium hall – which was opened in mid-2015 – will allow close integration of the exhibition and convention, with ERA using meeting rooms directly adjoining the IRE show floor.

That will mean rapid and easy access to the exhibition stands for ERA delegates, and give exhibitors the opportunity to showcase their products and services to hundreds of key European rental equipment buyers.

IRE is organised by BV Industrial Promotions International (IPI) in association with *International Rental News* (*IRN*) magazine.

First APEX Asia in 2017

An Asian version of the established APEX access equipment show is to run parallel to CeMAT ASIA 2017 in Shanghai on 31st October to 3rd November.

European APEX will continue in the Netherlands, with the next edition scheduled to take place from 2nd to 4th May 2017 at the Amsterdam RAI Convention Centre.

KHL Group and BV Industrial Promotions International (IPI), in co-operation with Deutsche Messe AG, are launching the Asian version of their popular APEX aerial platform exhibition.

The first APEX Asia will be held at the Shanghai New International Expo Centre, taking place parallel with CeMAT ASIA.

CeMAT ASIA is Asia's leading trade fair for intralogistics and supply chain management. The scheduling of both shows will give APEX exhibitors access to CeMAT ASIA's 70000 visitors. The new show will be located in Hall W5 at CeMAT ASIA, with free movement of visitors between the two exhibitions.

Access International, *IRN* sister magazine and part of publisher KHL Group, and the International Powered Access Federation (IPAF), are APEX Asia supporters.

Alongside the APEX Asia and CeMAT ASIA exhibitions, KHL will also stage its International Rental Conference (IRC), an annual event for the equipment rental sector in Asia that KHL has held in China since 2013. This conference is organised by *IRN* magazine.

For more details on these events, including registration, visit: www.apexasiashow.com

TCO calculator launched

The European Rental Association (ERA) has introduced a free online calculator designed to help users better assess the actual cost of equipment.

The ERA said the Total Cost of Ownership (TCO) Calculator, which was created in collaboration with the Solvay Brussels School of Economics and Management, was the first of its kind.

Designed to make all direct and non-direct costs clearly visible and available publically on a simplified and user-friendly interface, the calculator also offers an unbiased view of buy versus rental analysis; to help equipment stakeholders draw comparisons and make informed decisions.

Available online, as well as on Android and Apple App versions, the ERA stressed that all data generated by using the TCO Calculator would be owned and stored by the user.

The TCO Calculator is available at: http://equipmentcalculator.org



IRN Rental Share Index

COMPANY		Start date 11/1/06	Previous mth 22/03/16	Current mth 02/06/16	% change
			SHARE PRICES		
Acces Industrie (France)	€	0.47	2.00	2.02	+1%
Aggreko (UK)	£	2.75	10.73	11.24	+4.8%
Ashtead Group (UK/US)	UK£	1.83	8.74	9.86	+12.8%
Boom Logistics (Australia)	A$	3.70	0.07	0.07	0%
Cramo (Fin)	€	13.0	18.44	19.36	+5%
GAM SA (Spain)	€	8.00	0.23	0.23	0%
GL events (France)	€	29.96	17.60	16.09	-8.6%
H&E Equipment	US$	–	17.97	19.29	+7.3%
Kanamoto	Yen	–	2711	2426	-10.5%
Lavendon (UK)	UK£	2.20	1.45	1.30	-10.3%
Mobile Mini (US)	US$	46.2	31.66	34.55	+9.1%
Ramirent (Finland)	€	23.43	5.84	6.68	+14.4%
Speedy Hire (UK)	UK£	8.32	0.39	0.39	0%
United Rentals (US)	US$	24.9	63.54	69.45	+9.3%
***IRN* INDEX**		**100.0**	**228.73**	**254.97**	**+11.5%**

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

News from khl.com

MANUFACTURERS

■ Caterpillar has recorded first quarter revenues of US$9.5 billion (€8.5 billion), representing a year-on-year fall of US$3.2 billion (€2.9 billion). In its outlook for 2016, the company said it had seen recent increases in commodity prices, some signs of improvement in construction equipment in China and better order activity than expected at Bauma, Germany. Revenues for the year are expected to be in a range of US$40 billion (€36 billion) to US$42 billion (€38 billion).

■ Wacker Neuson reported a 2.4% year-on-year dip in first quarter revenues to €316 million, while earnings before interest and taxes fell 45.4% to €17.3 million. The light and compact equipment specialist said it had seen challenging conditions in markets around the world, particularly in the Americas region. But it confirmed its 2016 revenue forecast of between €1.4 billion and €1.45 billion, an increase of between 2 % and 5% year-on-year.

■ Kobelco Construction Machinery Europe has added Germany-based Thomas Baumaschinen to its dealer network, offering its excavator range for sale and rental as well as maintenance, servicing and spare parts. Other recent new dealer additions for Kobelco include Agricane and Solomat – the former is located on Réunion Island, which is off the coast of Madagasca, while the latter is a business specialising in construction machinery rental with 11 outlets covering central France and the Paris area.

RENTAL ROUND-UP

■ US-based United Rentals, the largest rental company in the world, said first quarter revenues stood at US$1.31 billion (€1.56 billion) for the first three months of the year, of which rental revenues stood at US$1.12 billion (€992 million). This compared to US$1.32 billion (€1.17 billion) and US$1.13 billion (€1 billion), respectively, for the same period last year. First quarter net income slipped to US$92 million (€81 million), compared with US$115 million (€102 million) for the same three months in 2015.

■ UK-headquartered Speedy Hire has reported a £57.6 million (€74 million) pre-tax loss for fiscal 2015, while revenues dropped 12% year-on-year to £329 million (€421 million). Exceptional costs for the year ended March 2016 were £59.9 million (€76.7 million), including acquisitions and restructuring costs. The international division has been restructured including the closure of operations in Egypt and Qatar and the sale of the business in Oman. The group also withdrew from the UAE spot hire business, but said its remaining oil and gas activities in the region were operating profitably.

■ US-based Mobile Mini reported total revenues for the first three months of 2016 of US$125 million (€110 million), of which rental revenues stood at US$117 million (€103 million). This compared to total revenues of US$133 million (€117 million) for the first quarter of last year, with rental revenues of US$123 million (€109 million). First quarter 2016 net income totalled US$11 million (€9.7 million), reversing the US$27.3 million (€24 million) loss in Q1 2015.

■ Weakness in North American oil and gas markets plus the sale of its French and Spanish rental businesses led to an 8% revenue fall in the first quarter for Hertz Equipment Rental Corp (HERC). It reported pre-tax losses of US$12 million (€11 million) on revenues of US$328 million (€293 million). Parent company Hertz said HERC's planned IPO remained on track for mid-2016.

PODCAST

■ The podcast accompanying this issue of *IRN* will be available shortly after publication on KHL.com – go to www.khl.com/videozone/podcasts/ or simply press the 'play' button on this image if you are reading the tablet edition.

For Android and others

For iPhones



MARKETS

■ The Canadian construction industry is forecast to improve over the next five years, despite declining 1.7% in 2015, according to a report by Timetric's Construction Intelligence Center (CIC). CIC believes the market could reach US$321 billion (€287 million) by 2020. Investments in public and renewable energy infrastructure, commercial projects, and improvements in investor confidence are expected to fuel growth.

■ The Polish construction industry expanded at a year-on-year growth rate of 4% in 2015, according to PMR. This figure compares to a preliminary estimate of 2.8% from the Polish Central Statistics Office (GUS). PMR said that stronger than official growth of the market in 2015 was also suggested by an increase of over 10% in the aggregated revenue generated by 30 construction contractors whose shares are listed on the Warsaw Stock Exchange. Despite the weak initial months of the year, 2016 still has a substantial growth potential, it said.

■ Construction activity in Romania accelerated in 2015, rising 10.4% year-on-year, compared with a modest rise of 1% in 2014, according to PMR. The increase was primarily due to an overwhelming increase in the civil engineering subgroup which, according to preliminary estimates, increased year-on-year by 20%. There was a fall of 5.8% in residential construction output however, but new construction output grew 5.2%, which was said to be due to the public sector. Spending on extensive repair construction projects grew 31.8%.

Rental information from *IRN*

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



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A capital idea

The rental industry spends huge amounts on new equipment – Kevin Appleton **examines some of the driving factors behind fleet investments.**



KEVIN APPLETON is former CEO of Lavendon Group and former divisional chairman of Travis Perkins. He is currently managing director of Yusen Logistics UK, non-executive chairman of Horizon Platforms, non-executive director at Ramirent Oyj, non-executive director at Arco Ltd, and non-executive director of the Freight Transport Association. To comment on these articles please email: IRNfeedback@khl.com

Capital Expenditure (capex) levels (principally spending money on equipment assets to rent out) across the rental industry have been increasing again over the last couple of years. The industry typically spends huge amounts, proportionate to revenues, on capex, so it's clearly an important thing to understand and to get right. So what drives capex and what are some of the things to think through when making capex judgements?

A casual glance at the amount of money spent by any mature rental business over a ten year period will show that there are tremendous fluctuations from year to year. A rental business, depending on its area of focus, will typically expect to generate between 25% and 50% of its revenues in operating cash flow (prior to any investment in capex) in a given year.

Operational factors

The other feature of rental businesses is that they are highly operationally geared (jargon for "have a lot of costs that they can't change quickly"). This means that when demand levels and, simultaneously, revenue levels fall, a large part of the revenue fall is felt in profitability and operating cash flow (because a higher proportion of the cash coming in is being used to pay unavoidable costs).

When this kind of (sometimes quite modest) fall in demand happens it makes no sense for the rental company to invest in capex at the same rate because (a) they have less cash coming in to support this and (b) the demand level means that they probably have excess equipment and would rather think about selling excess equipment than buying new stuff. For this reason the "free cash" (gross operating cash less capex) of rental companies tends to increase when markets are tough and stay level or increase when markets are improving.

For the equipment manufacturers these periodic corrections can be a nightmare. If a rental company had revenues of €500 million one year, producing €150 million of operating cash flow which then got used to support €100 million of capex, they would be a great customer for the manufacturers. However, if their revenues the next year fall by 10%, it is likely that their operating cash flow (pre any equipment disposals) falls to circa €110 million and their capex to (maybe) €50 million.

So in this, not untypical example, a 10% reduction in end market demand for the rental company gets amplified to a 50% reduction in demand for the manufacturers – a five times multiplying effect.

Market crash

In 2008, rental market demand in the developed economies fell by between 15% and 30% and, unsurprisingly, the manufacturers saw this end-market decline amplified to the point where their market almost dried up completely. We came very close to seeing Armageddon conditions in our industry in many parts of the developed world.

The challenge for the manufacturers, it seems to me, is to resist the urge to oversupply the market in good times, as this will likely only exaggerate the scale of their downturn when the end market goes through its next cyclical downturn (which it always does).

For the rental businesses the aim is to always maintain a fairly balanced age profile of fleet (although the peak and trough nature of their purchasing behaviours makes this tricky), so that when downturns come cash flow can be topped up by disposing of the excess older fleet which, by then, will be sitting at low residual values. This, of course, depends upon there being an active global used equipment market and this was something that also dried up in 2008.

The capex behaviours of the past have much to teach us about the potential industrial risks of the future. The question is "how well do we learn our capex lessons?" **IRN**

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Lieven van Broekhoven, Ammann executive vice president of sales and marketing



Bauma Munich ran from 11th to 17th April and attracted around 580000 visitors to view products from 3423 exhibitors, covering 605000m² of exhibition space

Recovery ahead

For Ammann, Europe is looking good. Lieven van Broekhoven**, executive vice president of sales and marketing, spoke to** Helen Wright **and** Sandy Guthrie **– editor of sister publication *Construction Europe* – about the Europe of the future and autonomous machinery**

The European market is looking brighter than it has recently, according to Ammann, the Swiss-based company that manufactures roadbuilding equipment, although Lieven van Broekhoven, executive vice president of sales and marketing, warned that the recovery might not be coming quite as fast as some were predicting.

"For 2016 we are forecasting a single-digit increase in revenues, between 6% and 8%," he said. "Growth will come from our increased globalisation drive – we are entering more countries and expanding our facilities around the world.

"We see growth in demand from the Americas and South-East Asia, while the Russian and Brazilian markets are difficult, and the Middle East has, of course, been hit by the oil price crash."

He said that in Europe, which represents 50% of the company's turnover, he saw the market was "up a little".

And Mr van Broekhoven identified the rental market as an important growth sector for the manufacturer, which he said had plenty of work to do to increase its presence in this industry.

"On a global scale, we are not active enough in the rental market," he said. "In Europe, this industry is very strong and we have a good presence with all the major rental companies, but it is clearly a growing global industry and we want to keep pace with this. We are keen to tap into this growing interest in rental and are looking for partners around the world – it's a very important part of our business."

Bauma boost

Meanwhile, van Broekhoven said that the recent Bauma show in Munich, Germany, had been the best ever for Ammann. He said he had engaged in more quality discussions with qualified buyers than before.

"I do sense there is an uptick in the market. I believe people have held off on capital investments for quite a long period of time – a couple of years – and they see the uptick coming as well. They're getting ready to buy some equipment, and that is all sorts, not just Ammann."

He said he saw confidence coming back into the European market.

"Not everywhere, but the UK, Germany, a little bit in Benelux. But the main drivers, I think, are Germany, France and the UK. The sentiment is positive, and I think it affects the rest of Europe in a positive way."

With the countries bordering the Mediterranean, such as Spain, Portugal and Italy, he said he thought the sentiment was extremely good. "It will take a little while longer, I think, but the signs are all upwards."

As to whether the potential growth was across Ammann's entire portfolio of products, he said that for Germany, it was across the board, with the same for France. He admitted that 2015 had been difficult for the French market, although he was not worried.

"With our range of products you touch so many customer segments. You go from the very small



equipment which is for small operators and rental houses, to large plants which are in a completely different customer segment. So within a country there is different customer segmentation."

He said he did not think it would ever go well for every single product in every single country with the range Ammann had. "It's up one, down the other usually. But France and Germany are strong currently – very stable – unlike the last couple of years, and the UK is getting there.

"In the Mediterranean area – Spain, Portugal – I think the sentiment is a little bit stronger than the reality is. But I'm pretty confident it will come.

"I think it will not come as quickly as people think," he warned. "Towards the end of the year it will start getting a little more traction. Over the last couple of years, all the excess capacity in terms of inventory has been flushed out of the market, so there is very little inventory."

Capacity

He said Ammann did not have an inventory issue in those countries, but the entire distribution channel, including all suppliers, had seen excess capacity.

"That's been more or less flushed out if you look at the inventory numbers. I believe another three to six months and people will have to start purchasing," said van Broekhoven. Ammann itself had got off to a good start, this year, he said.

"We have a very healthy order book, more or less across the board in terms of product segments."

The Ammann range stretches from the lightest compaction equipment to the heaviest plants.

"We have the full range, from an 800kg small plate all the way up to a 25 tonne soil compactor, and tyre rollers, double drums and tandem rollers.

"So, on the compaction line we are one of the few players – not the only one – that has a truly complete line from hand held to the heaviest.

"We do a full line of pavers, and then on the plant side we do both asphalt and concrete, because we completed the acquisition of Elba-Werk a couple of years ago. So on the plant side, we have the most extensive range of plants in the industry from low cost plants to serve the low segments in markets around the world, all the way up to the most

> "Rental is clearly a growing global industry and we want to keep pace with this. We are keen to tap into this growing interest in rental and are looking for partners around the world – it's a very important part of our business."

sophisticated 100% recycling plants – mostly for western Europe but some other countries as well."

While those top end plants are becoming increasingly sophisticated, he felt there was still further to go down that path.

"We are working on some things," he said. "The question for me is where do you draw the line – when does sophistication become nice to have but not really necessary."

On the subject of whether the new technology might not suit older operators, he said, "To me it's like a weighing scale. On the one hand you have what you and I would call the older people in the work force that understand the product that a plant is supposed to produce, the processes it takes – the guys that have the street smarts and the hands-on experience. They could have difficulties with all the automation and software, telematics and all of this."

He said that on the other side of the scale there was a younger generation for whom software was not an issue, but he felt that they did not have the hands-on experience, or what he referred to as "the real life experience with asphalt". He admitted that it was a difficult balance.

Autonomy

One of the latest projects for Ammann has been its first autonomous vibratory plate. The APH 1000 TC features electro-hydraulic controls, based on an existing remote-controlled vibrating plate.

In Teach In mode, the operator uses the remote control to navigate the plate along the borders of the area to be compacted. This is essentially setting the boundaries for the plate compactor. The number of vertices is not limited and the machine automatically detects the closed border.

After clicking the Run button, a working strategy is calculated and the field is compacted strip by strip. A GPS system is supported by an electronic compass and collision detection. Deviations of the GPS system are compensated by an overlap of the passes to ensure all areas are compacted sufficiently, according to Ammann.

"This is a prototype, of course," said van Broekhoven, "and we have a lot more testing to do in the field, but this kind of innovation drives positivity throughout our business – we need to think outside the box and ask ourselves what the future looks like for our industry.

"We're also looking at some other products too – there is work in progress here."

He said that as all manufacturers had been spending huge amounts of money in recent years on meeting emissions regulations, this kind of forward thinking was very welcome.

"That said," he added, "it will take a while for this sort of technology to gain traction in the market. The number of global customers that are currently investing in high tech equipment is actually quite limited. High technology is gaining ground in very developed markets, but that's not where the volume is."

"It's great technology, and there is definitely a place for it in the market, but not necessarily globally."

Whether it is taken as a serious addition to the compaction world depends on the public, he said. At Bauma, with Europeans visiting the stand, he said the autonomous model was well received with many enquires as to when Ammann would be coming to the market with it.

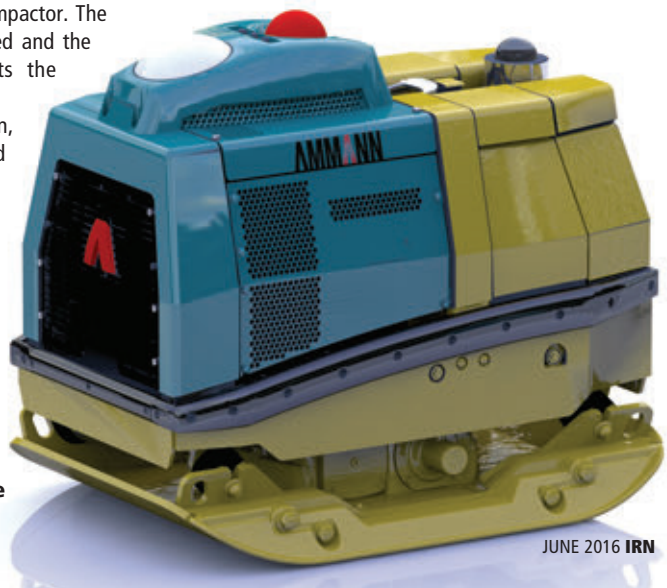
"What we have here is still under development – it's still a prototype," he said, but he felt that the launch would probably be early next year.

When asked whether this could be the start of a range of autonomous machines, he said, "With technology today, you can do just about anything. I think the market will dictate how much of that type of technology it will accept.

"I do believe – and I don't think it will change anytime soon – that there are geographical areas where this will go well, but not globally. You can have a main platform of products, be it plants or machines, which you build for the world, but you still end up having to regionalise some of the products to fit some of the regions better."

Within Ammann, he said that if he had to pick the one product segment which needed the most work, it was the asphalt paver line.

"We have a very good solid line up to what we would call the medium sized pavers, but we need to fill the gaps in terms of large pavers," said van Broekhoven. **IRN**



The APH 1000 TC features electro-hydraulic controls, based on an existing remote-controlled vibrating plate

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A stable start

Stability continues as a key sentiment from the first quarter ERA/*IRN* RentalTracker, but dampened spirits also set in. Helen Wright **reports.**

The year has started on a somewhat downbeat note, according to respondents to the first quarter ERA/*IRN* RentalTracker survey, which saw optimism slipping across Europe on all questions.

Nevertheless, the majority of respondents still reported steady business conditions – answering 'stable' or 'no change' to the survey questions. This has often been the case with previous surveys too.

Indeed, this trend reflects wider economic conditions across Europe. In fact, the International Monetary Fund has labelled slowing growth in advanced economies 'the new normal'.

As a result of this shift towards less dramatic trends, the ERA/*IRN* RentalTracker survey (which is jointly organised by *IRN* and the European Rental Association (the ERA) will no longer take place every quarter, and instead will be presented twice a year – see box story for the full details.

There were around 80 respondents to the first quarter questionnaire, still enough to highlight general trends, but not enough to present meaningful results for every country or region. For example, we are unable to present results for the Benelux this quarter.

The statistics for multinational companies should also be treated with a degree of caution because of the small size of the data set from this region.

Overall dip

That said, the overall impression from respondents was a dip in confidence, with the balance of opinion

TABLE 1

Forward thinking

PERCENTAGE FORECASTING BUSINESS TO BE 'BETTER' OR 'MUCH BETTER' 12 MONTHS AHEAD
(previous quarter in brackets)

UK/Ireland	86%	(70%)
Multinational	67%	(65%)
Italy	50%	(69%)
All Europe	**43%**	(56%)
Nordic	40%	(63%)
Spain	35%	(34%)
Germany	29%	(63%)
France	27%	(36%)

Changes to the survey

The European Rental Association (ERA) and *International Rental News (IRN)* are to reduce the frequency of the ERA/*IRN* RentalTracker from four surveys a year, to two a year.

Having two surveys will reduce the burden on rental companies to respond to surveys and still provide important information at crucial times of the year.

ERA secretary general Michel Petitjean said, "The rental market is changing less rapidly than in the years after we created the ERA/*IRN* RentalTracker – the first survey was in the second quarter of 2009. This means there is less of a need to track the market every 12 weeks. We are also sensitive about not burdening rental companies and associations with too many surveys.

"The new survey timings, meanwhile, will give the industry an insight into business conditions following the winter and summer seasons. We urge all rental companies to continue to support the ERA/*IRN* RentalTracker."

FIGURE 1

Europe: Business conditions now

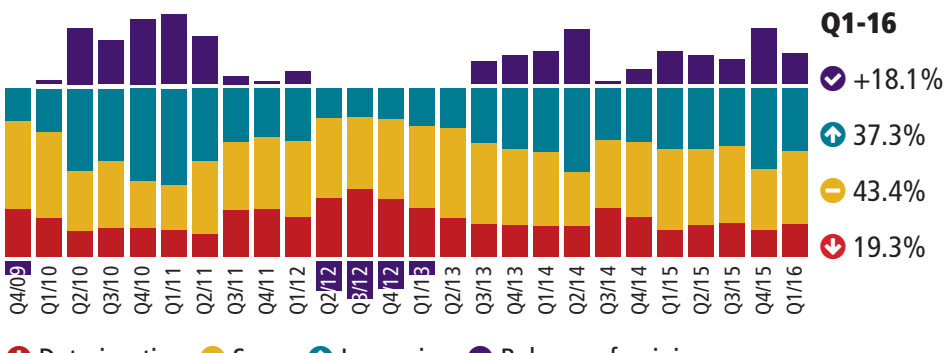
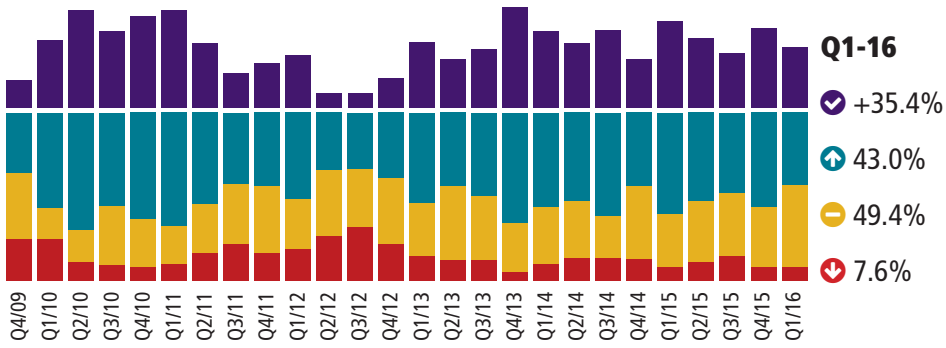


FIGURE 2

Europe: Expectations for year from now



(the difference in the percentage of respondents seeing positive and negative trends) on business conditions at the end of the first quarter dropping to +18%, compared to +34% for the final three months of 2015.

French respondents came in at the low end of the ranking, with a negative balance of -22% compared to +5% in the last survey, while German respondents came out on top at +43%, albeit lower than the balance of +56% produced for the same question in the last survey.

And there was a dramatic swing when it came to sentiment from multinationals on current conditions – with a balance of +34%, compared to +83% in the last survey. Again, please note these results are from a smaller sample.

But the majority of overall respondents (43%) said that they felt business conditions were stable – a central trend throughout the survey, as we have discussed.

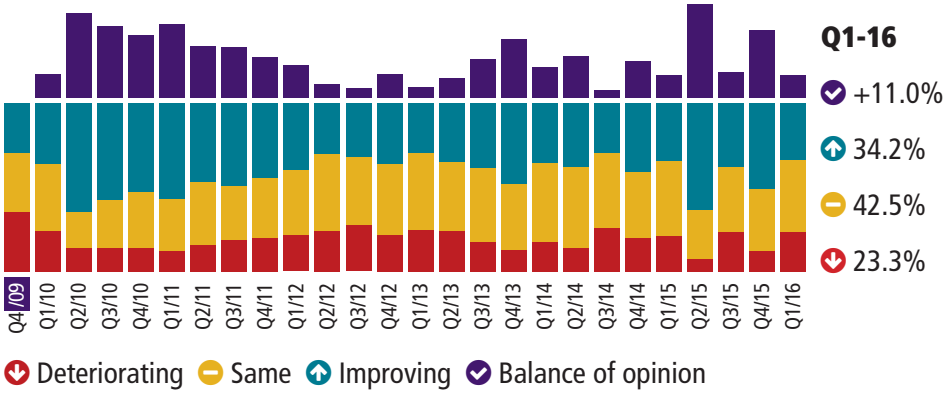
Meanwhile, year-on-year 37% of all those questioned for the first quarter survey reported growth in the first three months of this year compared to last.

By way of comparison, for the fourth quarter, 52% of respondents reported better business conditions year-on-year, while 38% of respondents to the first quarter 2015 survey reported improving business conditions. But once again, the majority of those questioned for the most recent survey reported stable conditions.

Spanish respondents were most confident, with 59% reporting year-on-year growth in the first quarter, while France again found itself at the bottom of the list with just 14% of respondents reporting growth. The balance of opinion for Europe was +15% for this question, but again the majority of respondents (42%) said conditions were the same as a year ago.

FIGURE 3

Europe: Time utilisation trend



Investment

Investment intentions are a key way of gauging the health of the rental industry, and for this question there was stability compared to the last survey.

In total, 39% of overall respondents reported expecting to increase investment by at least 10% in 2016. This compared to 38% of respondents to the same question in the last survey - for the fourth quarter of 2015.

French, German and Nordic respondents came in below the European total, with 29%, 17% and 20%, respectively, expecting to increase investment by at least 10% this year. Multinationals, Spain, UK and Italy came in above the overall total, with Spain consistently emerging as one of the more confident countries in this survey.

Of course, this needs to be seen in the context of an improvement after six years or more of recession. Indeed, the positive sentiment from Spain continues the momentum of a recovery trend seen

TABLE 2

Business booming, or local difficulties?

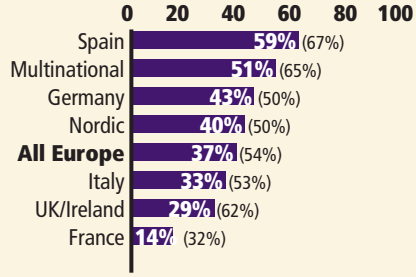
How countries differ on key indicators in the survey (all figures in percentages)

BALANCE OF OPINION ON BUSINESS CONDITIONS (END Q1, 2016)
(previous quarter in brackets)

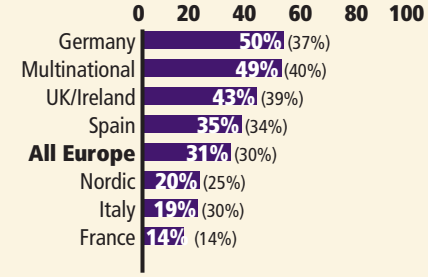
Germany	+43%	(+56%)
Spain	+36%	(+34%)
Multinational	+34%	(+83%)
Italy	+33%	(+29%)
Nordic	+20%	(+25%)
All Europe	**+18%**	(+34%)
UK/Ireland	0%	(+46%)
France	-22%	(+5%)

NOTE: Balance of opinion = proportion seeing improvement – proportion seeing worsening conditions.

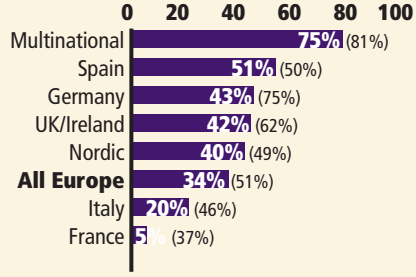
PERCENTAGE REPORTING Q1 2016 GROWTH VS Q1 2015
(previous quarter in brackets)



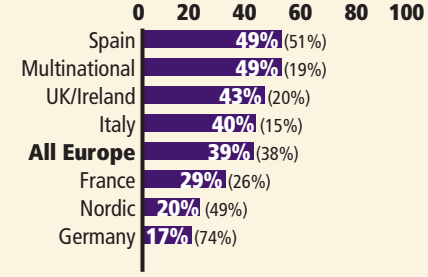
PERCENTAGE WITH INCREASING UTILISATION IN Q1 2016
(previous quarter in brackets)



PERCENTAGE WHICH WILL EMPLOY MORE IN Q1 2016
(previous quarter in brackets)



PERCENTAGE EXPECT TO INCREASE INVESTMENT BY >10% IN 2016
(previous quarter opinion in brackets)



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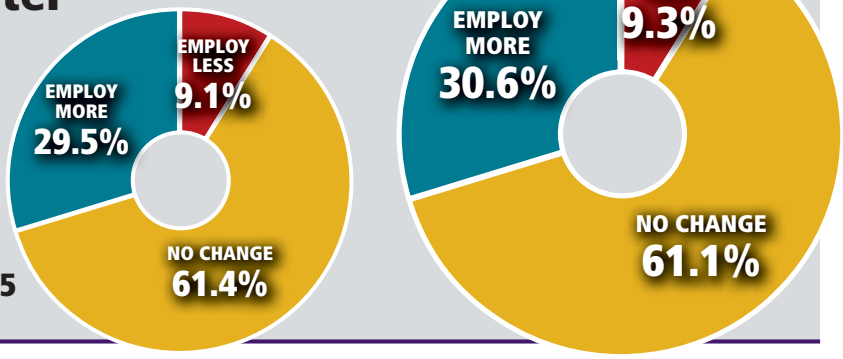
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FIGURE 4

Europe: Employment intentions for next quarter



Thank you

Around 80 companies responded to the ERA/*IRN* RentalTracker survey for the first quarter of 2016.

Thanks all the rental businesses who took part and to all the companies and associations who helped to promote the survey throughout Europe.

The RentalTracker for Europe is a joint venture between *IRN* magazine and the European Rental Association (ERA).

If you have suggestions about how the survey could be improved, please contact the ERA on: era@erarental.org
or, Helen Wright, *IRN* Editor: Helen.Wright@khl.com

in responses from this country across the last 12 months of RentalTracker surveys.

Meanwhile, nearly 50% of respondents to the question on investment intentions said they planned to maintain the same level of investment as last year – a clear positive, particularly in a slow growth environment.

The same is true of employment intentions, where 61% of those questioned said they would maintain the same level of employees going into the second quarter of 2016, while 31% said they planned to employ more staff.

The most optimistic countries on the question of employment intentions were Germany, multinationals, UK and Spain, while countries below the European average where the Nordics, Italy and France at the bottom.

Forecast

Looking ahead, 43% of all those surveyed said they expected business to be either better or much better 12 months down the line, with the UK coming in as by far the most positive – here, 86% of respondents forecast better conditions next year.

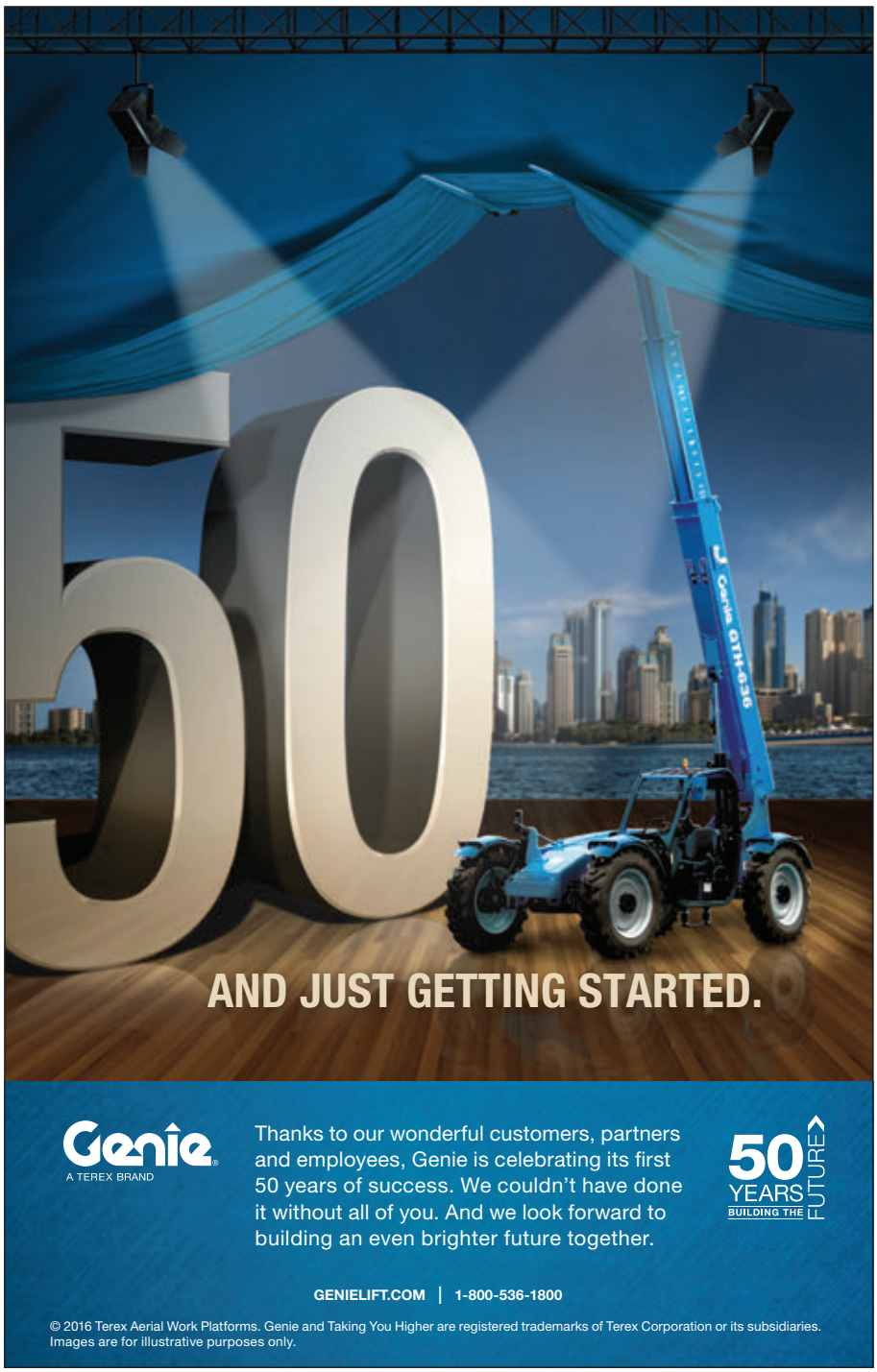
This compared to the fourth quarter survey, where an already high proportion of 70% of UK respondens expected business to be better or much better in a year.

Multinationals were also confident, as were Italians - both of which came in above the European average of 43% of respondents forecasting better or much better conditions. On the other side, however, just 27% of French respondents forecast improving business conditions in 12 months' time, down from 36% in the last survey.

Germany, Nordic regions and Spain also looked pessimistic, with 29%, 40% and 35% of respondens forecasting business to be better or much better respectively, 12 months ahead. This compared to the fourth quarter results for these countries of 63% of German respondends forecasting improving conditions in a year, 63% of Nordic respondents and 34% of Spanish respondents.

Nevertheless, 50% of overall respondents said they expected business conditions to remain stable in a year's time.

And this is the key takeaway from the first quarter survey – while the most optimistic respondents do appear to have been knocked back somewhat, the majority report and continue to expect business conditions to remain steady. **IRN**



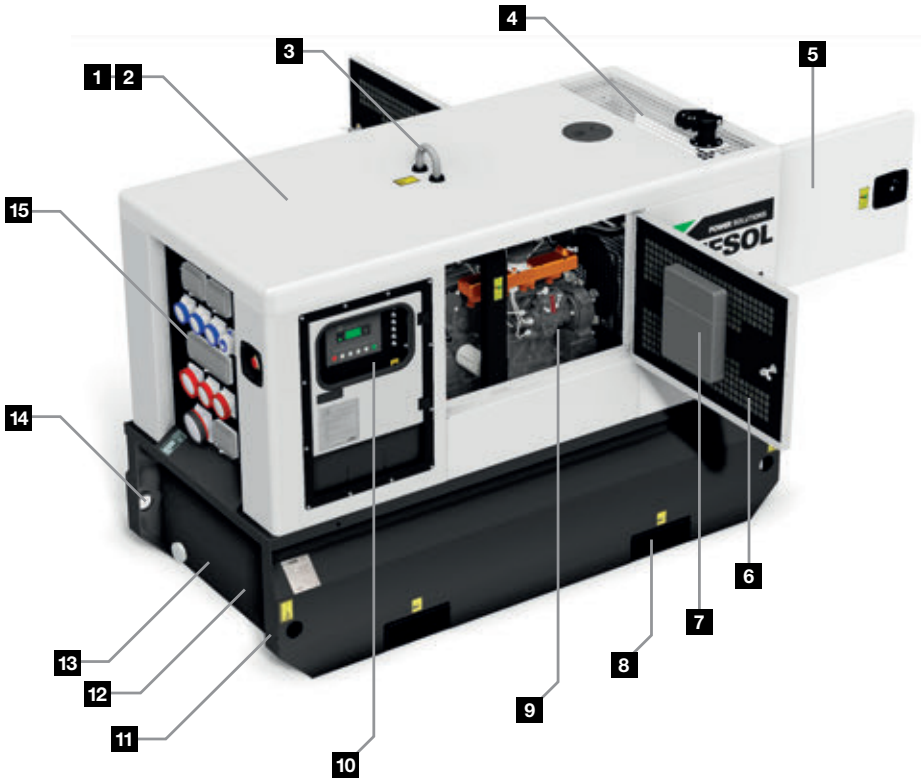
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Celebrating a


The award winners celebrating together

The winners of the 2016 European Rental Awards were announced during the European Rental Association Convention in Stockholm, Sweden.

The prestigious European Rental Awards took place on 8th June at the Hotel Clarion Sign in the beautiful city of Stockholm, Sweden.

The awards, which are jointly organised by *IRN* and the European Rental Association (ERA), comprised six categories, including a new award for Sustainable Business Innovation in Rental. *IRN* would like to thank all the companies and individuals that submitted entries to the awards.

AWARD 1


Riwal CEO Norty Turner (centre)

Large Rental Company of the Year (revenues over €15 million)

SHORTLIST:
- A-Plant (UK)
- Loxam (France)
- Riwal (Netherlands)

WINNER:

Riwal

WHAT THE JUDGES SAID:

"2015 was an important year for Riwal. It rolled out its new lean operation system, the Riwal Way, revenues rose 13% and EBITDA rose 22%. It created an online account management portal for its customers; developed electric versions of booms for special applications; and opened new locations in Belgium, Denmark, Sweden, India and Kazakhstan. In a very tightly contested category, and with shortlisted companies also performing extremely well, Riwal is a very worthy winner."

AWARD 2


The Crestchic team collect their award

Small/Mid-Sized Rental Company of the Year (revenues under €15 million)

SHORTLIST:
- Crestchic Ltd (UK)
- Drial Poland (Poland)
- Echo Barrier (UK)

WINNER:

Crestchic Ltd

WHAT THE JUDGES SAID:

"An established manufacturer of loadbanks for 30 years, Crestchic entered the rental market in 2013 and has been remarkably successful in creating a rental business in Europe and Asia. It grew rental revenues 10% in 2015, added new products – capacitive loadbanks – and diversified into data centres and facilities management. It has been both innovative and quick on its feet: a winning combination."

AWARD 3


EL & Site Oy for the MBerg LED light

Rental product of the year (launched during 2015)

SHORTLIST:
- EL & Site – MBerg LED-light
- Genie – Z-33/18
- HH-Intellitech – GlasLift 550 Terrain
- Holland Lift – HL-330 E14
- Kaeser – M82
- Wacker Neuson – WL20e

WINNER:

EL & Site Oy for the MBerg LED light

WHAT THE JUDGES SAID:

"The Mberg is a site light that requires almost zero maintenance, can be used in tough conditions, and is suitable for use in a wide range of environments. Its low voltage and excellent heat distribution means they are safe to use, and their high energy efficiency reduces the CO_2 footprint, making them a 'green' choice. The Mberg may be small, but it has been developed with the needs of rental companies in mind. We congratulate the company for a top class piece of product design."

dynamic industry

HIGHLY COMMENDED:

Wacker Neuson for the WL20e wheeled loader



WHAT THE JUDGES SAID:

"By listening carefully to what the market was requesting, Wacker Neuson developed an electrically driven wheeled loader that will enhance rental for indoor applications. Offering no emissions, less noise, ease of maintenance as well as lower maintenance costs, Wacker Neuson deserves recognition for its efforts."

AWARD 4



Hilti's Gerhard Gasser (L) gave the award to Kiloutou CEO Xavier du Boÿs, with presenter Nadine Dereza on the right

Sustainable Business Innovation in Rental

SHORTLIST:

- HSS Hire (UK)
- Hewden (UK)
- Kiloutou (France)
- Loxam (France)

WINNER:

Kiloutou

WHAT THE JUDGES SAID:

"Kiloutou has been pursuing a sustainable rental agenda for 15 years and in that respect is one of the pioneers in the equipment rental industry in Europe. In 2015, initiatives included providing customers with a carbon footprint calculations included on invoices; a hazardous waste recycling procedure co-developed with partner Veolia; and new processes with partner Ecologic to ensure that machines at the end of their life are properly recycled. Its new logistics system allowed it to reduce its in-house transport fleet by 25% yet increase the number of deliveries. Kiloutou takes sustainability seriously, and adopts strategies across every aspect of its business."

AWARD 5



A-Plant's Asif Latief (R) accepted the award on Sat Dhaiwal's behalf – it was presented by Pierre Boels, CEO of Boels Rental (L)

ERA/*IRN* Rental Person of the Year

Sat Dhaiwal

CEO, A-Plant

WHAT THE JUDGES SAID:

"Sat Dhaiwal joined A-Plant aged 22 in 1992 and was appointed CEO in 2002 and has proven to be a distinguished rental leader. Last year was a successful one for his company. A-Plant's revenues grew almost 17%, while it made six acquisitions and secured £120 million in fleet investment from its parent Ashtead. Sat's own background in the industry – he started as a fitter aged 16 – is reflected in his commitment to staff development, and in particular to the company's apprenticeship scheme. During 2015 A-Plant made its largest ever investment in apprentices, taking on 103 new trainees, of which a quarter were female. We are delighted to honour Sat as our Rental Person of the Year."

AWARD 6



Christine Wehrman (centre) with ERA secretary general Michel Petitjean (L) and Nadine Dereza (R)

Lifetime Achievement Award

Chris Wehrman

CEO, American Rental Association

WHAT THE JUDGES SAID:

"Christine Wehrman, the Executive Vice President and CEO of the American Rental Association (ARA), is retiring later this year after sixteen years with the organisation. She leaves the ARA in extremely good health. It has record membership levels; is acknowledged as an authoritative source of rental statistics; and has expanded the status of the annual Rental Show as a global meeting place for the industry. Christine deserves the respect and gratitude of the wider rental industry for her efforts to globalise and professionalise the rental industry."

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The ERA Convention

EUROPEAN RENTAL ASSOCIATION

The European Rental Awards took place on the first evening of the European Rental Association (ERA) Convention, and at the same venue – the Hotel Clarion Sign Stockholm, Sweden.

Around 300 delegates from the European and international rental industry (including manufacturers and suppliers) attended the event, which ran from 8th to 9th June. It was the 11th ERA Convention, and the association used the opportunity to celebrate its 10th anniversary.

And a number of senior figures from the global rental industry gave presentations, including Egbert de Jong, vice president of strategy and product development, asset management and remarketing at DLL, and Christina Lindbäck, Senior vice president of corporate sustainability at NCC.

Meanwhile, guest speaker, Kjell Nordström gave a lecture on Cities, Women and Machines – The Art of Making Money in the 21st Century, on 9th June. The Convention also boasted workshops, as a table-top exhibition and networking breaks.

■ Watch out for the July/August issue for full coverage.

The €40 IRN100

IRN100 Notes & thanks

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

- Rankings are based on rental revenues for 2015 (or the most recent financial year) and include sales of used fleet and consumables/contractor supplies. Where known, sales of new equipment have been excluded from the survey.
- Figures denoted (Est) have been estimated by *IRN*. As in previous years, figures denoted RER are taken, with thanks, from the annual RER-100 survey published by US-magazine RER (Rental Equipment Register) in May 2015.
- All revenues have been converted into € using exchange rates as at 31/12/15, as follows (exchange rates used in last year's survey are given in brackets):

€1.00 = US$1.093 (1.211)
= UK£0.738 (0.777)
= AU$1.51 (1.483)
= CA$1.517 (1.405)
= JPY131.7 (144.5)
= ZAR16.99 (13.99)
= SEK9.19 (9.42)
= SG$1.547 (1.60)
= NOK9.603 (9.02)
= BRL4.326 (3.22)
= CNY7.087 (7.51)
= NZ$ 1.598 (1.55)

Revenues for the largest 100 rental companies in the world grew 5% year-on-year in 2015 – fuelled by strong growth from the US



With combined 2015 revenues of €39.6 billion, the largest 100 rental companies in the world have worked hard to change and expand amid unpredictable global markets.

On a like-for-like basis (stripping out the impact of currency fluctuations between 2014 and 2015), the value of the IRN**100** grew 5% year-on-year, with the combined total of the top five companies jumping 13% to reach €12.3 billion at constant exchange rates, and €13.4 billion in real terms – see Table 1.

The vast majority of this growth came from rental companies that generate the their revenues in the US - firms which were still enjoying a buoyant environment, at least until the second half when the oil and gas downturn started to bite.

Revenues at the big Japanese rental companies were pretty much flat (after adjusting for currency changes), while in Europe, they were around 4% up year on year for the top 50. Much of this growth will have come through acquisitions and through growing revenues at the largest UK renters.

Headwinds impacting the global rental industry in 2015 included the oil and gas crisis, over-fleeting, and tough competition. Currency volatility also hit individual company results, particularly multinationals trading in many different currencies, as well as the results of this table, which is presented in Euros – see the notes box for the details of the exchange rates used.

Despite this, rental companies capitalised on the growth they could find in construction equipment rental markets as well as other sectors such as events, temporary accommodation and power rentals to grow their revenues.

Products featured in the IRN100

IRN limits its definition of rental to products that are, broadly, related to the construction industry as well as some sectors of general industry and events. That means we include construction equipment, small tools, portable accommodation, aerial equipment, pumps, shoring equipment, power and temperature control.

This excludes many other rental sectors, including specialist businesses such as medical equipment rental, testing and measurement equipment, and the rental of specialist oil and gas related equipment. Industrial forklift trucks is another sector that we do not yet cover.

RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
1	1	United Rentals	5090	3980	Greenwich, Connecticut, US	US, Canada	Construction equipment, tools	897	12700	+001 (203) 622-3131 www.unitedrentals.com
2	2	Ashtead Group	3226	2364	London, UK	UK, US	Construction equipment, tools	691	13021	+44 020 7726 9700 www.ashtead-group.com
3	3	Aggreko	2116	2030	Glasgow, UK	Global	Construction equipment	204	7300	+44 141 225 5900 www.aggreko.com
4	5	Aktio Corp	1500	1360	Tokyo, Japan	Japan, Thailand, Singapore, Malaysia, and Taiwan	Construction equipment, tools	705	5517	+81 3 6854 1413 www.aktio.co.jp/en/
5	4	Algeco Scotsman	1416	1448	Baltimore, Maryland, US	Europe, North America, Middle East, Brazil, Asia Pacific	Portable accommodation/ modular	239	5049	+1 410 931 6000 www.algecoscotsman.com

billion club

RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
6	6	Hertz Equipment Rental Corp	1312	1215	Park Ridge, New Jersey, US	US, Canada, France, Spain, China, Saudi Arabia	Construction equipment, tools			+1 201 307 2000 www.hertzequip.com
7	7	Kanamoto	1012	942	Sapporo, Japan	Asia Pacific	Construction equipment	445	2465	+81 3 5408 5600 www.kanamoto.co.jp
8	9	Loxam	838	812	Paris, France	Europe, Morocco.	Construction equipment, tools	668	5000	+33 1 58 440 400 www.loxam.com
9	10	Nishio Rent All Co	834	764	Osaka, Japan	Asia Pacific	Construction equipment	368	2865	+81 6 6251 7302 www.nishio-rent.co.jp
10	11	Nikken Corp	756	717	Tokyo, Japan	Asia Pacific, US, UAE	Construction equipment	186	2241	+81 3 5512 7311 www.rental.co.jp/english
11	12	Cramo	668	652	Vantaa/Helsinki, Finland	Europe, Russia	Construction equipment, tools, modular	328	2486	+46 8 623 5477 www.cramo.com
12	14	Ramirent	636	614	Vantaa, Finland	Europe, Russia	Construction equipment, tools, modular	288	2654	+358 20 750 200 www.ramirent.com
13	8	Coates Hire Ltd	612	904	Sydney, Australia	Australia	Construction equipment, tools	238	2400	+61 2 9701 3308 www.coateshire.com.au
14	13	Sarens	606	637	Wolvertem, Belgium	Global	Cranes	106	4452	+32 52 319 319 www.sarens.com
15	16	Home Depot Rentals	RER 584	456	Atlanta, Georgia, US	US, Canada, Mexico	Construction equipment, tools	1275		+1 770 433 8211 www.homedepot.com
16	21	BlueLine Rental	511	426	The Woodlands, TX, US	US, Canada	Construction equipment	140	2000	+1 866 610 2583 www.bluelinerental.com
17	48	Maxim Crane	RER 503	220 EST	Bridgeville, PA, US	US	Cranes and aerial platforms	31		+1 412 504 0200 www.maximcrane.com
18	17	Taiyo Kenki Rental	484	452	Shizuoka, Japan	Japan	Construction equipment	110		+81 542 843 111 www.taiyokenki.co.jp
19	15	Kiloutou	462	458	Marcq en Baroeul, France	France, Poland	Construction equipment, tools	475	3650	+33 359 56 55 39 www.kiloutou.fr
20	26	Mobile Mini	453	339	Tempe, AZ, US	US, Canada, UK, Netherlands	Portable storage & accommodation	159	1500	+1 480 894 6311 www.mobilemini.com
21	18	Speedy Hire	446	450	Newton-le-Willows, UK	UK & Ireland, Middle East, North Africa	Construction equipment, tools	206		+44 0845 601 5129 www.speedyservices.com
22	28	Ahern Rentals	437	321	Las Vegas, Nevada, US	US	Construction equipment	78	1840	+1 800 400 1610 www.ahern.com
23	20	AMECO	434	427	Greenville, SC, US	North America, South America, Africa, Asia Pacific	Construction equipment, tools	36	2679	+1 864 295 7800 www.ameco.com

TABLE 1

IRN100 Revenues

	2015 (currency adjusted)	2015 Revenues (€ billion)	2015 % change (adjusted)	2014 % change (adjusted)	2013 Revenues (€ billion)	2012 Revenues (€ billion)	2011 Revenues (€ billion)	2010 Revenues (€ billion)	2009 Revenues (€ billion)	2008 Revenues (€ billion)	2007 Revenues (€ billion)
Top 5	€ 12.3bn	€ 13.35bn	13%	€ 10.87bn	€ 9.23bn	€ 8.38bn	€ 6.96bn	€ 5.30bn	€ 5.04bn	€ 6.30bn	€ 7.20bn
Top 10	€ 16.6bn	€ 18.1bn	7%	€ 15.51bn	€ 13.01bn	€ 12.35bn	€ 11.44bn	€ 8.90bn	€ 8.07bn	€ 10.00bn	€ 10.80bn
Top 50	€ 30.9bn	€ 32.9bn	5.5%	€ 29.30bn	€ 25.55bn	€ 25.43bn	€ 24.23bn	€ 20.20bn	€ 18.73bn	€ 22.00bn	€ 22.10bn
Top 100	€ 37.3bn	€ 39.7bn	5%	€ 35.42bn	€ 31.70bn	€ 31.40bn	€ 29.43bn	€ 24.90bn	€ 23.20bn	€ 27.10bn	€ 26.90bn
Total World Market		€ 73.5bn (Est)		€ 70bn	€ 70bn	€ 65bn	€ 60bn	€ 55bn	€ 55bn	€ 60-65bn	€ 62bn

RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
24	27	Sunstate Equipment Co	430	330	Phoenix, AZ, US	US	Construction equipment	60	1500	+1 602 275 2398 www.sunstateequip.com
25	24	HSS Hire	423	366	Mitcham, UK	UK/Ireland	Construction equipment, tool hire	300		+44 08457 282828 www.hss.com
26	19	H&E Equipment Services	405	436	Baton Rouge, Louisiana	US	Construction equipment			+1 801 908 4307 www.he-equipment.com
27	25	Zeppelin Rental	373	348	Garching (Munich), Germany	Europe, Russia	Construction equipment, tools, party/events, modular	135	1238	+49 (0)89 32 000 220 www.zeppelin-rental.com
28	46	NES Rentals	348	235 EST	Deerfield, IL, US	US	Construction equipment	75	1100	+1 800 NES RENT www.nesrentals.com
29	30	Liebherr Mietpartner	341	315	Ludwigshafen, Germany	Europe	Construction equipment	134	257	+33 680 889 822 www.liebherr.com
30	31	Boels Verhuur	340	300	Sittard, Netherlands	Europe	Construction equipment, tools, party/events	350	2750	+31 (0)46 459 2159 www.boels.com
31	34	Neff Rental	336	294	Miami, FL, US	US	Construction equipment	66	1100	+1 305 513 3350 www.neffrental.com
32	29	Lavendon Group	328	317	Lutterworth, UK	Europe	Aerial platforms	70	1610	+44 1455 558 874 www.lavendongroup.com
33	36	Hitachi Construction Machinery Japan	311	290	Saitama, Japan	Japan	Construction equipment	274	3020	+81 (0) 48 933 5509 www.hitachi-kenki.co.jp
=34	31	Mediaco	302	300	Marseille, France	France, Germany, Africa	Cranes, construction equipment, specailised transport	60	1530	+33 4 9103 8191 www.mediaco.fr
=34	44	TNT Crane & Rigging	302	248 EST	Houston, US	US	Cranes			(001) 800.799.2505 www.tntcrane.com
=36	35	HKL Baumaschinen	300	292	Hamburg, Germany	Germany, Austria, Poland	Construction equipment	150	1215	+49 (0)800 44 55 44 www.hkl-baumaschinen.de



United Rentals maintained top position in the IRN100

This year, the top 25 spenders in the table invested €7 billion on their fleets, down 7.9% year-on-year (more on this later). There are 41 companies headquartered in Europe in this year's table, up from 39 last year, while there were 35 companies from North America and 10 from Japan – the same as last time.

It was a different story in South America, however, where the commodity price dip and wider instability continued to bite in major economies, notably Brazil – hitting local rental companies hard.

Three companies from South America made it onto this year's IRN**100**, down from six in last year's table, while Solaris Equipamentos E Servicos landed in 110th position on the near misses table (see Table 9) and others (A Geradora Aluguel de Maquinas and Makro Engenharia) dropped out of the ranking entirely (see Table 3).

The big five

But looking back at the top of the ranking; a year of strong growth saw United Rentals cross the €5 billion revenue threshold, maintaining number one position on the IRN**100** and showcasing the resilience and flexibility of the business in the face of the oil and gas downturn.

Ashtead – which owns A-Plant in the UK and Sunbelt in North America – followed again in second position with rental revenues totalling €3.2 billion for the 2015 calendar year. It is still a way off from taking the number one spot, but expanded significantly last year both organically and through acquisitions. The company reports its results in Pound Sterling, but the majority of its business (84%) is generated in the US, so its value is eroded somewhat by the strong pound.

Meanwhile, power rental specialist Aggreko also maintained third position in this year's ranking, despite seeing a 3% drop in revenues thanks to the impact of lower commodity prices and difficult trading conditions.

However, the jostling starts at positions four and five, with Japan's Aktio rising to fourth place this year, knocking Algeco Scotsman back to fifth place. US-headquartered modular space specialist Algeco >

TABLE 2

IRN100 Regional trends

CONTINENT	NUMBER OF COMPANIES 2015	2014	2013	2012	2011	2010	2009	2008	2007
Europe	41	39	42	44	44	50	54	55	56
N America	35	35	34	31	30	28	27	27	26
Japan	10	10	10	10	11	11	11	12	13
Australia	5	5	6	6	6	6	4	4	4
South America	3	6	3	3	4	3	2	0	0
Middle East	3	3	3	3	2	0	0	0	0
Asia (inc China)	3	2	2	2	2	1	1	1	0
Africa	0	0	0	1	1	1	1	1	1

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RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
=36	42	Atlas Copco Specialty Rental Div.	EST 300	250 EST	Houston, US	Global	Compressors and generators			+1 281 454 2200 www.atlascopco.com/rental
38	51	Portakabin	297	200 EST	York, UK	Europe	Accommodation rental, events		1497	+44 01904 611655 www.portakabin.co.uk
39	31	Zahid Group	EST 290	300 EST	Jeddah, Saudi Arabia	Saudi Arabia	Construction equipment, power			+966 2 6671156 www.zahidcat.com
40	23	Select Plant Hire	286	385 EST	Dartford, UK	UK, Australia, UAE	Construction equipment, tools, cranes			+44 (0)1322 296200 www.selectplanthire.com
41	40	VP PLC	279	265	Harrogate, UK	Europe, UAE, Singapore, Australia, South America	Construction equipment, tools			+44 (0)1423 533 445 www.vpplc.com
42	37	Toromont Industries	274	289	Stoney Creek, Ontario, Canada	Canada	Construction equipment	100	3500	+1 905 643 9410 www.battlefieldequipment.ca
43	38	Xylem	EST 262	285	Bridgeport, US	Global	Pump rentals			www.xyleminc.com
=44	39	Tat Hong	260	276	Singapore	Asia Pacific	Cranes, construction equipment			+65 62690022 www.tathong.com
=44	42	Mammoet Holding BV	EST 260	250	Schiedam, Netherlands	Global	Cranes	90	5200	+31 10 204 24 24 www.mammoet.com
46	50	TVH Group	224	208	Waregem, Belgium	Europe	Construction equipment	73	1308	+32 56 43 42 11 www.tvh.com
47	NEW	Baker Corp	223	NA	Texas, US	North America, Europe	Pumps, containers	62	954	www.bakercorp.com
=48	22	APR Energy	216	401	Jacksonville, Florida, US	Global	Power			+1 904 223 2278 www.aprenergy.com
=48	53	All Family of Companies	EST 216	195 EST	Cleveland, Ohio, US	US, Canada	Cranes	38	1500	+1 800 232 4100 www.allcrane.com
50	58	GAP Group Ltd	213	180	Glasgow, UK	UK	Construction equipment, tools	130	1400	+44 141 225 4600 www.gap-group.co.uk



A JCB telehandler in A-Plant's fleet

reported a 10% drop in revenues year-on-year for 2015, thanks in part to its sale of Brazilian portable accommodation business Eurobras, as well as lower modular rentals in Canada and Asia Pacific.

Conversely, Aktio's revenues were actually flat year-on-year, but the company benefitted from the conversion from Japanese Yen into Euros – a factor which applies to most of the large Japanese companies.

Growth league

Joint top of the growth league was Ashtead Group, which saw a 36% increase year-on-year. It said both Sunbelt and A-Plant took advantage of improving conditions and increased their market share, while a string of strategic acquisitions also fuelled growth.

Temporary accommodation specialists also fared well in this year's IRN**100**, with Mobile Mini seeing 34% year-on-year growth and jumping up six places to 20th position in the main ranking and fifth in the growth league. Again, the conversion from US$ to € also boosted this result somewhat.

Nevertheless, as well as reporting strong demand for its products and services, Mobile Mini has also been busy growing through bolt-on acquisitions; focussing on high-return, low-maintenance assets during the year, and shedding assets that didn't fit with this strategy, including its wood mobile office business.

All in all, eight of the ten companies in the growth league are headquartered in the US, while UK-headquartered Ashtead generates the lion's share of its revenues in the US, as already mentioned. So Riwal stands out as the only non-US dependent company, showing 18% year-on-year growth in eigth position in the growth league and 50th position in the overall ranking (up five places from last year).

Netherlands-based access specialist Riwal started 2015 with the acquisition of UK training specialist ALS Safety, and went on to open new depots including sites in Belgium, Denmark and Sweden towards the end of 2015. The European aerial work platform rental market is thought to have grown 3% last year to a value of €2.7 billion, according to the International Powered Access Federation.

European top 50

Meanwhile, the European Rental Association (ERA) valued Europe's rental market at about €23.4 billion in 2015, up 1.4% against 2014. The 50 rental companies generating the largest revenue volume >

TABLE 3

IRN**100** Drop-outs

COMPANY	REVENUES
A Geradora Aluguel de Maquinas	55.5
Makro Engenharia	44

TABLE 4

IRN**100** New entrants

RANK	COMPANY	REVENUES
47	Baker Corp	223
71	Lou-Tec	128
79	AJ Networks	117
92	Hawk Plant Hire	91

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DIECI

RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
51	55	Riwal	212	183	Dordrecht, Netherlands	Europe, UAE, Qatar, India, Brazil, Kazakhstan	Construction equipment	59	1421	+31 78 618 1888 www.riwal.com
52	51	ADCO	EST 207	200 EST	Ratingen, Germany	Global	Portable toilets			+49 2102 8520 www.adco.de
53	47	Komatsu Rental	EST 199	221	Yokohama, Japan	Japan	Construction equipment			+81 45 274 3337 www.komatsu-rental.co.jp
54	41	Finning International	193	254	Toronto, Canada	Canada, UK, South America	Construction equipment, power			+1 780 930 4800 www.finning.com
55	45	Caterpillar Japan (Nippon)	191	245 EST	Tokyo, Japan	Japan	Construction equipment	173	2716	+81 (3) 5717 1121 www.nipponcat.co.jp
56	57	Carrier Rental Systems	EST 190	180 EST	Leatherhead, Surrey, UK	Europe, Singapore	Construction equipment, party/ events			+44 (0)1372 220169 www.carrierrentalsystems.co.uk
57	59	Kennards Hire	187	172	Sydney, Australia	Australia, New Zealand	Construction equipment, tools	140	1200	+61 2 880 56100 www.kennards.com.au
58	63	Lambertsson Sverige AB	186	155	Förslöv, Sweden	Sweden	Construction equipment			+46 431 89300 www.lambertsson.com
59	54	NCSG	185	187	Alberta, Canada	Canada, US	Cranes	27	1080	+1-855-560-5050 www.ncsg.com
60	60	Rent Corp	184	162	Japan	Japan, Thailand	Construction equipment	54		+81 54 238 7000 www.rent.co.jp
61	92	AmQuip Crane Corp	RER 183	90 EST	Philadelphia, PA, US	North America	Cranes	15	500	+1 215 639 9200 www.amquip.com
=62	62	Kyosei-Rentemu	166	155	Japan	Japan	Construction equipment	96		+81 155 33 1380 www.kyosei-rentemu.co.jp
=62	65	Ainscough Crane Hire Ltd	166	150	Wigan, UK	UK	Cranes			+44 (0)1257 478501 www.ainscough.co.uk



RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
64	61	Compact Power Equipment Rental	EST 164	160 EST	Fort Mill, US	North America	Construction equipment	1000		+1 803.324.8000 www.cpiequipment.com
65	64	Emeco Holdings	161	154	Perth, Australia	Australia, Canada, Indonesia, Chile	Heavy construction and mining equipment		332	+61 8 9420 0222 www.emecogroup.com
66	65	ModSpace	EST 155	150 EST	Berwyn, PA, US	US, Canada	Portable accomodation			+1 484 254 0100 www.modspace.com
67	67	Ring Power	EST 152	145	St Augustine, FL, US	US	Construction equipment			+1 904 737 7730 www.ringpower.com
68	79	McGrath Rentcorp	148	109	Livermore, California, US	US, Canada	Portable accommodation			+1 925 606 9200 www.mgrc.com
69	56	Boom Logistics	138	181	Melbourne, Australia	Australia	Cranes, aerial platforms	20	550	+61 3 9864 0200 www.boomlogistics.com.au
70	73	Holt Cat	EST 136	122	San Antonio, Texas, US	US	Construction equipment			+1 210 648 1111 www.holtcat.com
71	NEW	Lou-Tec	RER 128	NA	Quebec, Canada	Canada	Construction equipment, tools	80		www.loutec.com
72	49	Mills Estruturas e Serviços de Engenharia	127	217	Rio de Janeiro, Brazil	Brazil	Construction Equipment	51	1558	+55 21 21 233 700 www.mills.com.br
73	70	SoEnergy International	EST 125	135 EST	Miami, Florida, US	Latin America, Middle East, Africa	Power rentals			+1 305 715 7308 www.soenergy.com
=74	67	Nordic Crane	124	145 EST	Halden, Norway	No, Sw, Fi, Dk	Cranes	50	600	+47 69 21 70 70 www.nordiccranegroup.com
=74	72	Shanghai Pangyuan Construction Equipment Rental Co., Ltd	124	125	Shanghai, China	China	Construction equipment, cranes		3915	+86 21 321 800 88 www.pangyuan.com



Brendon Bowserwashers in Zeppelin Rental's fleet

> The 50 rental companies generating the largest revenue volume from Europe in the ranking (Table 5) produced a total of €11 billion, up 3.8% compared to the 2015 table (based on revenues for 2014).

from Europe in the ranking (Table 5) produced a total of €11.1 billion, up 3.8% compared to the 2015 table (based on revenues for 2014).

French giant Loxam maintained top position in the European table, and also moved up a place in the main ranking to 8th position. Its acquisitions during the year included OBM Construction, a modular space rental business with bases in Orleans and Rochefort du Gard, while it also negotiated the purchase of the French and Spanish businesses of Hertz Equipment Rental Corp (HERC), which is being prepared for an IPO by parent Hertz – a float scheduled to take place this summer.

Loxam also took a 25% stake in Brazilian company Degraus in its first deal in South America and only its second outside Europe in its history. The company said it was a long-term strategy and represented a good opportunity for the next 20 years.

Following Loxam were Finnish rivals Cramo and Ramirent, in second and third position on the European Top 50 respectively, and 11th and 12th position in the overall IRN**100**. Both companies saw growth last year despite mixed conditions in Nordic rental markets, while both are also targeting growth in the temporary space market.

Cramo acquired MDS Raumsysteme's modular space fleet in Germany towards the end of the year, for instance, while Ramirent launching a new sub-brand – Ramirent Temporary Space – to strengthen its position in this growing market. It will certainly be interesting to see how these deals impact both companies' position in the next IRN**100** and European Top 50 tables.

Elsewhere in the European Top 50, UK-headquartered Speedy Hire dropped a couple of places to 9th position, and fell to 21st place on the main IRN**100**, from 18th place last time. Speedy produced a €74 million pre-tax loss in 2015 after restructuring its international operations, including the closure of operations in Egypt and Qatar and the sale of the business in Oman.

In the UK and Ireland, where the majority of Speedy's revenues are generated, the company said it had seen a partial recovery in the final quarter, but revenues for this region were still down 12% year-on-year.

The European Top 50 contained no less than six new entrants this year, the highest ranking of which was Hawk Plant Hire, a privately-owned UK rental company which took 32nd position and offers a wide range of construction equipment, portable accommodation and tractors, followed by Mobile Mini, which is no stranger to the main IRN**100** but whose UK portable storage operation contributed 18% to its 2015 rental revenues. >

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RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
76	71	SK Rental Group	122	131	Santiago, Chile	Chile, Peru, Brazil, Colombia	Construction equipment	25	600	+56 2 837 3500 www.skcrental.cl
77	77	Cleveland Brothers Equipment Co	RER 121	113	Murrysville, PA	US	Construction equipment	21		+1 866 551 4602 www.clevelandbrothers.com
78	76	Equipment Depot	EST 119	114	Texas, US	North America	Construction equipment			(+1)7138696801 www.eqdepot.com
79	NEW	AJ Networks	117	NA	Seuol, South Korea	Korea, Vietnam, Saudi Arabia	Construction equipment	40	400	+82 2-6240-0827 www.ajurental.com/eng
80	81	Warren Cat	RER 115	101	Texas, US	US	Construction equipment	17		14059476771 www.warrencat.com
81	75	Compagnia Generale Trattori (CGT)	113	115	Milan, Italy	Italy	Construction equipment	54	200	+39 02 274 271 www.cgt.it
82	82	Madisa	111	100 EST	Monterrey, Mexico	Mexico	Construction equipment	44	2357	+52 01 800 92 623 472 www.madisa.com
83	69	Hewden	109.5	136	Manchester, UK	UK	Construction equipment			+44 (0)845 60 70 111 www.hewden.co.uk
84	94	Brandon Hire	108	80 EST	Bristol, UK	UK	Construction equipment, tools, party/events	155	913	+44 (0)117 972 0872 www.brandonhire.co.uk
85	80	General de Alquiler de Maquinaria (GAM)	105	104	Madrid & Oviedo, Spain	Europe, Saudi Arabia, Mexico, Panama, South America	Construction equipment	80	1000	+34 985 732 273 www.gamalquiler.com
86	84	Byrne Equipment Rental	102	95 EST	Dubai, UAE	Middle East	Construction equipment, aportable accommodation, party/events	13	750	+971 4 4544800 www.byrnerental.com

>

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RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
=87	84	Red-D-Arc Welderentals	EST 101	95	Grimsby, Canada	North America, Europe, UAE	Welding/power	50		+1 905 643 4212 www.reddarc.com
=87	84	Peinemann Holding	EST 101	95	Hoogvliet, Netherlands	Netherlands, Belgium	Construction equipment, cranes			+31 10 295 5000 www.peinemann.nl
89	78	Onsite Rental Group	EST 100	110	Sydney, Australia	Australia	Construction equipment			+61 2 8814 3200 www.onsite.com.au
=90	84	Jewson Tool Hire	EST 98	95 EST	Coventry, UK	UK	Tool hire			+44 024 7643 8400 www.jewson.co.uk/tool-hire
=90	84	Ohio Cat	EST 98	95	Ohio, US	US				1440.52662 www.ohiocat.com
92	NEW	Hawk Plant Hire	91	NA	Shropshire, UK	UK, Europe, West Africa	Construction equipment		500	www.hawk-group.co.uk
=93	84	Energyst BV	EST 90	95 EST	Breda, Netherlands	Europe, South Africa, Chile, Argentina	Power, temperature control			+31 (0)800 3637 4978 www.energyst.com
=93	106	Komatsu Cummins Chile Arrienda	90	65 EST	Santiago, Chile	Chile	Construction equipment	10	194	+ 56 2 2979-9200 www.komatsuarrienda.cl

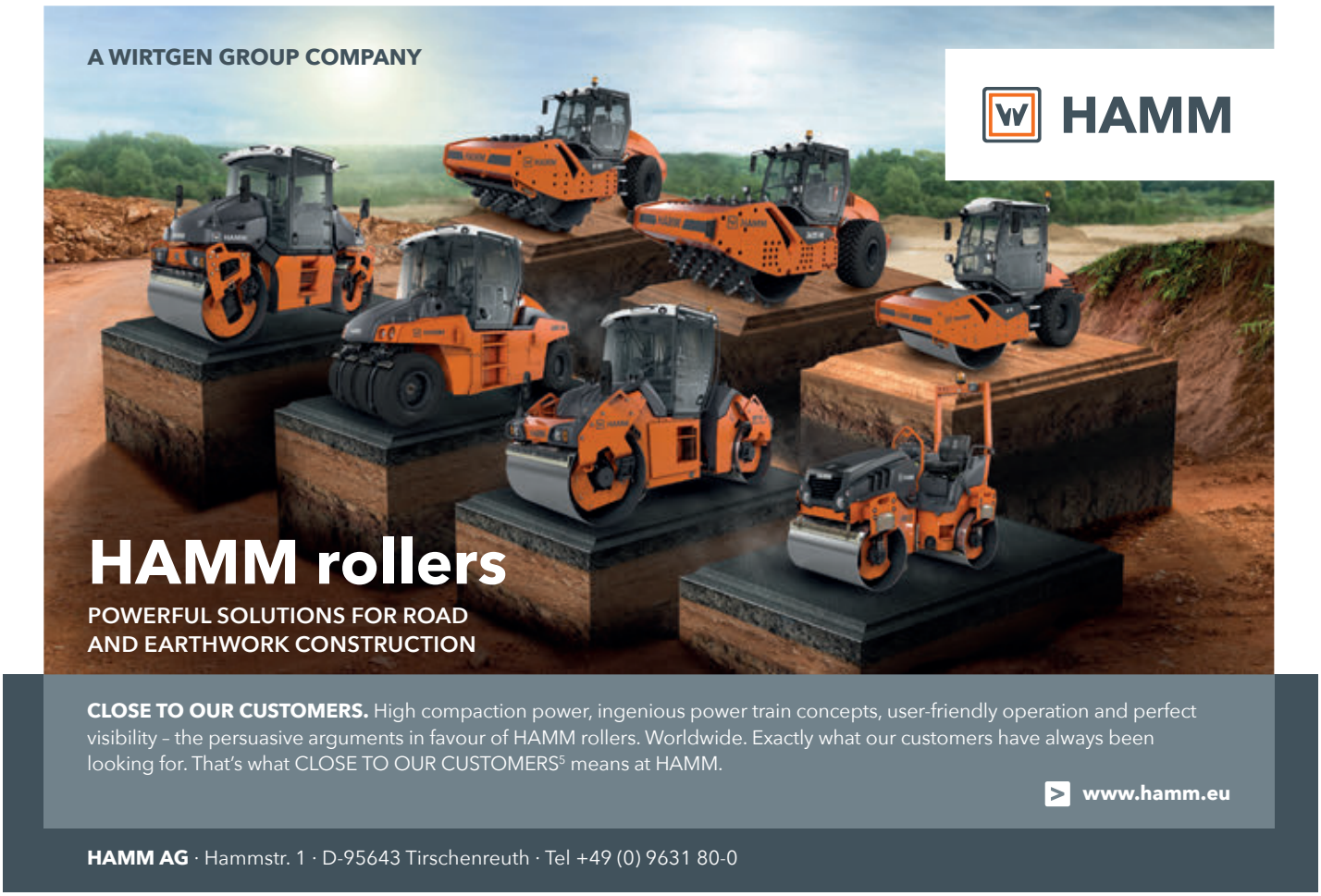


Loxam reached 8th position in the IRN100

Another new face came in the shape of Ardent Hire, which ranked joint 40th in the European Top 50 table, and 104th position on the IRN**100** – making it eligible for the near-misses club (Table 9). The company was formed by the merger of UK rental companies One Call Hire and Fork Rent, and 2015 was its first full year of operation.

It claims to have the largest joint telehandler and excavator fleet in the UK, and is backed by over €131 million of capital of new investment from private equity firms Searchlight Capital Partners and Duke Street Capital to further strengthen its fleet. It will certainly be fascinating to see where Ardent ranks in the next IRN**100** as it battles its way forward's in the UK's fiercely competitive market.

Avesco was also a new company in the European Top 50 Table – the Caterpillar dealer in Switzerland that has operated a Cat Rental Store operation for many years, and which also stocks a wide range of non-Cat equipment in its fleet. >



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Meanwhile, four new companies made it into the overall IRN**100** (see Table 4), with US-based pump and containment rental specialist Baker Corp jumping in to 47th position. It boasts €223 million in revenues, predominately generated in North America where it has 51 branches, with 11 branches in Europe as well.

Lou-Tec was another fresh face, a Canadian general equipment and access rental company parachuting in to 71st position with €128 million in revenues. And South Korea's AJ Networks also returned to this year's IRN**100** in 79th place with revenues of €117 million.

The number of companies from Asia, including China, in the IRN**100** totalled three – aerial platform company AJ Networks as mentioned, Singapore-based crane rental specialist Tat Hong in joint 44th position (compared to 39th position in the last ranking), and tower crane rental specialist Shanghai Pangyuan Construction Equipment Rental in joint 74th position (slipping back two places year-on-year).

The near-misses table also contains Shanghai Horizon Equipment & Engineering in 109th position with 2015 revenues of €60.5 million. It is one of the largest access rental companies in China.

TABLE 5

ERN**50** European rental revenues 2015

RANK 16 15	COMPANY	2015 REVENUES (€M)
1 1	Loxam	837.0
2 2	Cramo	668.0
3 3	Ramirent	635.0
4 4	Algeco Scotsman	542.0
5 8	A-Plant	466.0
6 6	Kiloutou	462.0
7 5	Sarens	Est 450.0
8 9	HSS Hire	423.0
9 7	Speedy Hire	418.0
10 10	Zeppelin Rental	373.0
11 11	Liebherr Mietpartner	341.0
12 12=	Boels Verhuur	340.0
13 17	Lavendon	328.0
14 14	Aggreko	Est 315.0
15 12=	Mediaco	302.0
16 15	HKL Baumaschinen	300.0
17 20=	Portakabin	297.0
18 19	Select Plant Hire	286.0
19 16	VP Plc	249.5
20 18	TVH Group	224.0
21 22	GAP Group	213.0
22 20=	Mammoet	Est 205.0
23 24	Lambertsson Sverige	186.0
24 23	ADCO	Est 181.0
25 25	Ainscough Crane Hire	166.0
26 29	Riwal	127.0
27 26	Nordic Crane	124.0
28 28	Compagnia Generale Trattori	113.0
29 27	Hewden	109.5
30 31	Peinemann	Est 101.0
31 36=	Atlas Copco Specialty Rental	Est 96.0
32 NEW	Hawk Plant Hire	91.0
33 NEW	Mobile Mini	Est 81.5
34 35	Utleiecompagniet	81.0
=35 31	Prangle Gesellschaft	80.0
=35 38=	Foselev	Est 80.0
37 40	General de Alquiler de Maquinaria	Est 74.5
=38 38=	Pekkaniska Group	73.0
=38 46	De Boer Structures	73.0
=40 47	Nixon Hire	72.0
=40 NEW	Ardent Hire	72.0
=42 42=	Hune Rental	70.0
=42 41	Salti	70.0
44 44	Arcomet	65.0
45 34	Touax	64.5
46 49=	Malthus	63.0
47 NEW	Avesco	58.0
48 48	Gruppo Venpa 3	52.0
49 NEW	Acces Industrie	51.0
50 NEW	HE Group	37.0
	TOTAL (€billion)	11186.5



The Kennards Hire Cannington branch, Australia

TABLE 6

IRN**100** Capital expenditure Top 25 investors

	COMPANY	GROSS CAPITAL EXPENDITURE 2015 (€ MILLION)
1	Ashtead Group	1488.0
2	United Rentals	1403.0
3	Aktio Corp	532.0
4	Hertz Equipment Rental Corp	407.0
5	Aggreko	321.0
6	Algeco Scotsman	254.0
7	Kanamoto Co	249.0
8	Nishio Rent All Co	232.0
9	Sunstate Equipment Co	221.0
10	Cramo	175.0
11	Sarens	167.0
12	Ahern Rentals	147.0
13	AMECO	145.0
14	Ramirent	139.0
15	Neff Rental	137.0
16	Nikken Corp	128.0
17	Lavendon Group plc	123.0
18	Caterpillar Japan (Nippon)	104.0
19	Hitachi Construction Machinery Japan	102.5
20	GAP Group Ltd	99.0
21	Zeppelin Rental	97.0
22	Speedy Hire	94.0
23	Shanghai Horizon	89.0
24	HSS Hire	88.0
25	Nes Rentals	82.0

TOP 25 SPENDERS	(-7.9%) €7.0bn
TOP 25 (2014)	(+26.7%) €7.6bn
TOP 25 (2013)	(-4.8%) €6.0bn
TOP 25 (2012)	(+10.5%) €6.3bn
TOP 25 (2011)	(+211%) €5.7bn
TOP 25 (2010)	(+209%) €2.7bn
TOP 25 (2009)	(-70%) €1.3bn



While the rental industry in China has felt the strain of the country's recent economic slowdown, its potential for growth is huge and is certainly a region that is expected to be better represented in future editions of the IRN**100**. In fact, Off-Highway Research forecasts moderate growth to return to China's construction equipment market in 2017.

Capital Investment

Spending levels dropped by 7.9% in this year's IRN**100**, with the top 25 investors (of the companies which provided this data) spending €7 billion on their fleets in 2015, compared to €7.6 billion last year.

The evidence from these 25 spenders points to an overall lower year of fleet renewal and expansion for the industry; a sensible response to volatile markets around the world. And another point is oversupply – indeed, over-fleeting in the rental industry was identified as a significant drag on results in United Rentals' 2015 annual report. High capacity in the market can help pile pressure on rental rates and prolong soft market conditions.

However, many companies are also pursuing diversification strategies, and are targeting their capital investment at broadening their fleet mix, allowing them to grow their presence in new sectors away from the core construction focus. Take Ashtead, for instance, which reported with gross capital expenditure of €1.49 billion last year, surpassing United Rentals' spend of €1.4 billion.

The company's strategy includes diversifying into specialist markets, and this was demonstrated in 2015 through A-Plant's investment in new fleet both in its core business and through its specialist units including PSS Hire, FLG Services and Tool Hire Express.

In fact, the ERA has said that European rental companies are more aggressive than ever in trying to offer new products and services. Zeppelin Rental is another case in point – a Caterpillar Rental Store with a broad product offering beyond Cat product, including its latest deal with Jungheinrich to stock industrial forklifts, and its previous acquisition of the Streif Baulogistik rental business, and the BIS Blohm

> "Spending levels dropped slightly in this year's IRN**100**, with the top 25 investors spending €7.17 billion on their fleets in 2015, compared to €7.6 billion last year."

TABLE 7

IRN**100** Growth league

	COMPANY	% GROWTH
1	Ashtead Group	36%
2	Ahern Rental	36%
3	McGrath Rentcorp	36%
4	Mobile Mini	34%
5	Sunstate	30%
6	United Rentals	28%
7	Blueline	20%
8	Riwal	18%
9	HSS Hire	16%
10	Neff Rental	14%



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Nikken's Kobe service centre, Japan

TABLE 8

IRN100 Top 10 'Global' players

RANK	COMPANY	REVENUES (€ MILLION)	NOTES
1	Ashtead Group	3226	UK, US, Canada
2	Aggreko	2116	Over 100 countries worldwide
3	Algeco Scotsman	1416	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/NZ and Asia
4	Hertz Equipment Rental	1312	US, Canada, France, Spain, China, Saudi Arabia
5	Nikken Corp	756	Japan, USA, Thailand, UAE, Indonesia, Myanmar
6	Sarens	606	63 countries worldwide
7	Mobile Mini Inc	453	US, Canada, UK, Netherlands
8	Speedy Hire	446	UK, Ireland, Middle east, North Africa
9	Ameco	434	US, Canada, Mexico, Chile, Peru, Jamaica, Dominican Republic, Colombia, Australia, Philippines, Mozambique, Panama
10	Lavendon	328	Europe, Asia

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

+ Voss Inspection Service testing company. Zeppelin Rental ranked 19th on the capital expenditure table, and 27th on the overall IRN**100** ranking.

Loss of traction

Of the companies that slipped down the ranking in this year's IRN**100**, global temporary power specialist APR Energy stood out – landing at joint 47th position, compared to 22nd position in the last edition.

The company was acquired by private equity consortium Apple Bidco in October 2015 after a volatile year which saw its business in the Middle East hit hard by ongoing conflict and political uncertainty, resulting in the early termination of its contract in Libya, and controlled shutdown of its business in Yemen.

The Apple Bidco consortium, controlled by Fairfax Financial Holdings, ACON Equity Management, and Albright Capital Management, paid £1.75 (€2.43) per share for the company and supplied additional funding of €181 million) to recapitalise it. It will be interesting to see if this backing sets APR Energy on a sustainable path to recovery in the future.

> The ERA has said that European rental companies are more aggressive than ever in trying to offer new products and services.



RANK 16	15	COMPANY	TURNOVER (€ MILLION) 15/14	14/15	HEAD OFFICE	AREAS OF OPERATION	TYPE OF RENTAL COMPANY	NUMBER OF DEPOTS	STAFF	CONTACT DETAILS
95	97	Rental Solutions & Services (RSS)	EST 89	80 EST	Dubai, UAE	Middle East, Pakistan, Africa, Cyprus.	Power, temperature control			+971 4 8849699 www.rss.ae
96	74	Briggs Equipment	RER 82	119	Dallas, TX, US	US, Mexico, UK	Construction equipment			+1 214 630 0808 www.briggsequipment.com
97	93	Utleiecompagniet AS (UCO)	81	88.9	Kjeller, Norway	Norway	Construction equipment, tools, cranes	18	271	+47 400 06 450 www.uco.no
=98	83	Prangl Gesellschaft M.B.H.	80	97.6	Brunn/Gebirge, Austria	Europe	Cranes, aerial platforms	16	674	+43 02236 326 350 www.prangl.at
=98	94	Foselev	EST 80	80 EST	Aix-en-Provence, France	France, Congo, Gabon	Cranes, portable accommodation, aerial platforms			+33 4 42 24 57 57 www.foselev.com
100	97	Pekkaniska Group	73	80	Vantaa, Finland	Europe	Aerial platforms and cranes	27	450	+358 10 6622 000 www.pekkaniska.com
TOTAL €39.7 billion										

South American companies, as we have discussed, fell across the board thanks to the tough market conditions in the region. And companies with businesses in the Middle East also lost some traction in this year's IRN**100** as the oil and gas crisis impacted demand.

Byrne Equipment Rental, for instance, hovered closer to the bottom end of the table in 86th position, down from 84th place, although it is a well-diversified business with a presence in the events, industrial and general construction rental markets as well as oil and gas.

Another year of growth for the IRN**100** can only be a positive for the global rental industry, and it is very promising that as well as the established behemoths branching out into fresh sectors and geographies, new faces are also entering the table each year.

But in spite of the size of the biggest companies, the global rental industry remains highly fragmented and localised. United Rentals is a €5 billion plus company, but it estimates that it has around a 12% share of the North American market.

So as dominant as it may seem, even in this established rental market there is much to play for – given the number of rental companies in the US, consolidation seems to be a natural fit.

And the potential for growth in emerging rental markets such as China, South America and India is also enormous. *IRN* looks forward to welcoming new names from around the world to the IRN**100** in future as momentum builds and the rental model continues to be established globally. **IRN**

Watch this space for further analysis

The IRN**100** Extended Toplist – a more detailed look at this year's IRN**100** survey – will be available in the coming months from the KHL.com Information Store. This stand-alone, extended version of the table will not only include data on company revenues, fleet investment and industry consolidation, but also new commentary on each of the companies in the IRN**100**, as well as extra graphs analysing the trends.

The idea is to provide additional background context on the companies in the table, delving deeper into the reasons as to how and why they got to their position in the ranking. The additional graphs and charts also make it easier to interpret the data, offering a great visual representation of the trends in the industry.

A video featuring editor Helen Wright analysing this year's table will also be available soon on khl.com

TABLE 9

IRN**100** Near misses

RANK	COMPANY	2015 REVENUES (€M)	LOCATION	TYPE OF RENTAL	CONTACT DETAILS
101	De Boer Structures	73.0	Alkmaar, Netherlands	Party/events	www.deboer.com
102	Touax	72.5	Paris, France	Portable accommodation	www.touax.com
103	Nixon Hire	72.0	Newcastle upon Tyne, UK	Construction equipment, tools, parties/events	www.nixonhire.com
104	Ardent	72.0	Enfield, UK	Construction equipment	www.ardenthire.com
105	HUNE Rental	70.0	Madrid, Spain	Construction equipment, tools, parties/events	www.hune.com
106	Salti	70.0	Marcq en Baroeul, France	Construction equipment, tools, parties/events	http://salti.fr/
107	Arcomet	EST 68.0	Paal, Belgium	Canes	www.arcomet.com
108	Malthus	63.0	Sandness, Norway	Construction equipment, modular buildings	www.malthus.no
109	Shanghai Horizon Equipment & Engineering	60.5	Shanghai, China	Construction equipment	www.horizon-equipment.com
110	Solaris Equipamentos E Servicos	EST 60.0	São Paulo, Brazil	Construction equipment	www.solarisbrasil.com.br

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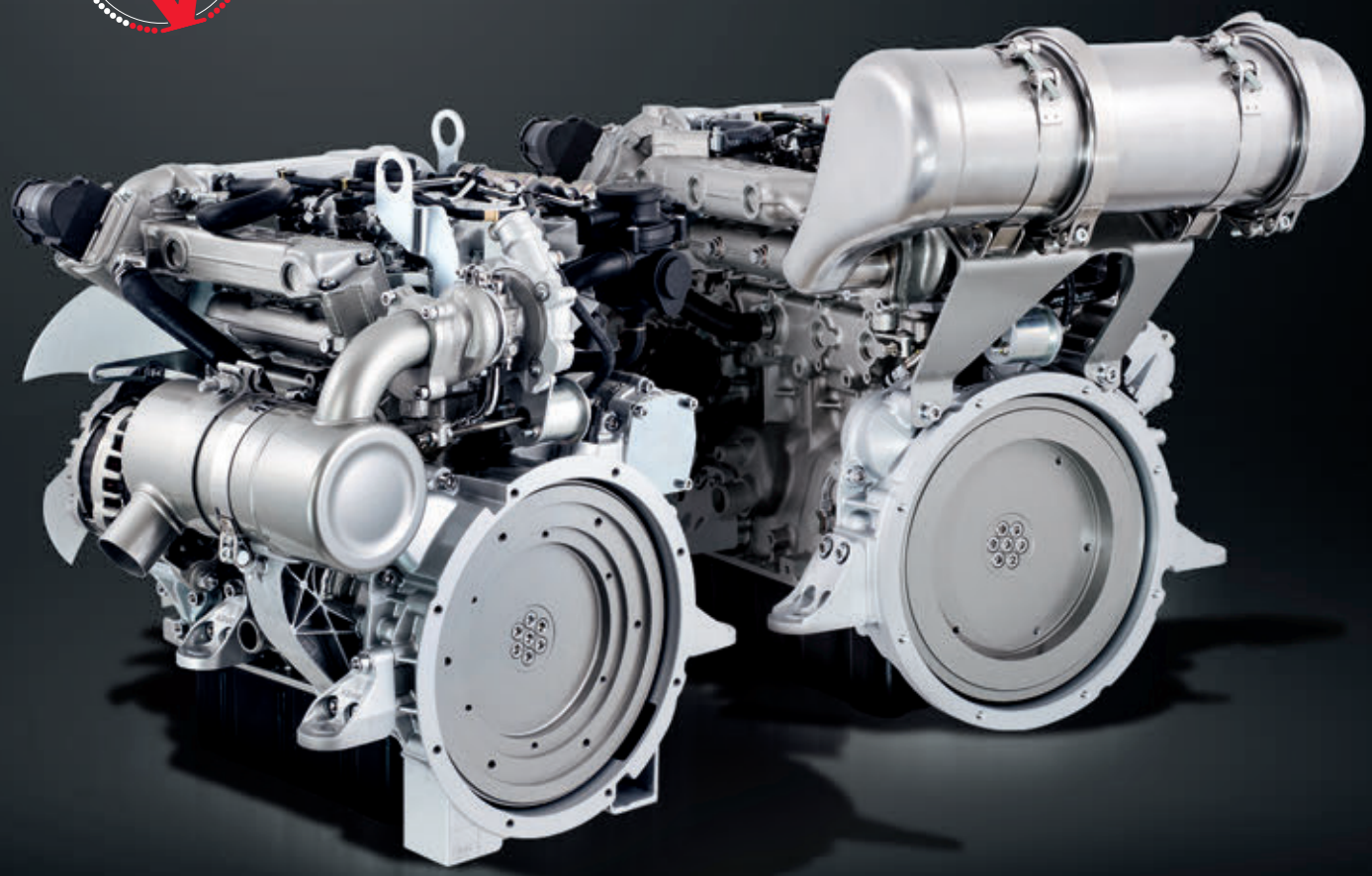
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Heading for Hillhead

All of the space at this year's Hillhead show in the UK has been taken, with more than 460 exhibitors set to attend.

Taking place from 28th to 30th June, 2016, at Tarmac's Hillhead Quarry, near Buxton, Derbyshire, UK, the Hillhead show is aimed at Europe's mining and quarrying industry, and contains many products of interest to rental buyers on the heavier end of the market.

Taking place every two years, this year, the show will have a new outdoor area at the southern end of the site and an extended registration pavilion – in fact, 2000m² of additional exhibitor space has been added since the last show.

Live rock processing, quarrying and recycling demonstrations will also take place. Here is a snapshot of what will be on show. **IRN**



JCB's new Hydradig 110W wheeled excavator will be on show, together with a range of machines for quarrying, construction and recycling. The Hydradig is designed for versatility, visibility, stability, manoeuvrability, and serviceability in urban construction, highway maintenance and municipal applications.



Pumps from Selwood will be displayed, including the S150M – a new medium-head pump suitable for multiple uses including dewatering for sites and quarries, sewage handling, waste and wastewater applications, and long-distance water transfer. it deatures Selwood's Selprime automatic self-priming technology.



Doosan will showcase its DX530LC-5 Stage IV-compliant excavator, as well as the DX255LC-5, and the DL550-5 and DL420-5 wheeled loaders. Doosan Portable Power will display its new 12/254 portable compressor, while Bobcat will have its new T450 and T590 compact tracked loaders and the E10 and E26 excavators on the stand.



The latest and largest addition to Bell Equipment's E-Series articulated dump trucks will be at Hillhead – the 59 tonne payload B60E. This 4X4 machine boasts full articulation steering and oscillation joint. The B25E, B30E, B40E and B50E will also be on show, as well as several wheeled loaders.



On display on the Case stand will be a wide range of earthmovers, with 19 different models including the new D series Tier 4 Final-compliant heavy excavator range. On the compact side, four compact and mid-sized crawler excavators will be on show, ranging from 2.7 tonnes to 8.7 tonnes in weight: the CX26B, CX50B, CX75C and CX80C (pictured).

Sandvik said it would showcase mobile crushers and screens, breakers and drill rigs as well as recent developments from its Customer Services division – including tools, consumables and wear parts. The company said a number of product launches were also planned at the show, not least its QJ341 jaw crusher with the global launch of a new pre-screen.





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Practical lighting

Alternative power sources, longer run-times and more easily transportable models demonstrate that manufacturers are focussing on increasing the practicality of the latest lighting tower launches. *IRN* reports.





Generac's Cube+ lighting tower

Himoinsa's new AS4012 LPG

Himoinsa has introduced a new gas-powered lighting tower targetting rental fleets - the AS4012 LPG. Said to be unique on the market, it is fuelled by four LPG cylinders, and powered by a Yanmar 3GP88-GB1PB engine, whose additional power for auxiliary supply rises to 5kW (50Hz) and 7kW (60Hz).

Manuel Aguilera, gas product manager at Himoinsa, said the new model was well-suited to the oil and gas rental markets as well as rental companies wanting to offer emissions reductions.

"We think the AS4012 LPG lighting tower is the first 100% LPG lighting tower on the market. It can run for 26 hours on four LPG tanks," he said.

"It's well-suited to inner-city working, and the events market. Versatility is key here. We have also developed a gas-powered genset – the HRGP 60 T5, with an integrated LPG tank. It can also run off external LPG and external natural gas. The idea is to offer packages for rental companies. "

The AS4012 LPG also offers reduced oil change intervals – changes are needed every 500 hours, compared to the 200 hours required by diesel engines. The new model has four 1.000W lamps and its mast can be rotated 360º, lighting up to 32000m².

LED Launches

Meanwhile, a string of new LED lighting towers have also entered the market. For its part, Atlas Copco said it had now completed its HiLight range – a seven-model lighting tower series, including four LED models. The HiLight range comprises of the H5+, B5+, V5+ models, as well as the E3+ LED light tower, in addition to the V4, H4 and E2 metal halide variants.

The latest edition is the HiLight H5+, with four LED lamps each projecting 350W of light. It is capable of illuminating an area of 5,000m². And the model's compact size means 10 units can be moved on a standard 13m truck, according to Atlas Copco.

Similarly, the HiLight B5+ model features a compact box-unit design, which makes it well-suited for mass transportation and easy installation. And the new HiLight E2 and E3+ are electric models – Atlas Copco said users simply connect to any power source, including auxiliary power, electrical generator or directly into the grid.

It added that the LED light towers, depending on the model, offer a run time between refuelling of 260 hours and consume less than 0.5 litres of fuel per hour.



Paladin has introduced the Case Light CLU10K



Morris Site Machinery's SMC TL-90 ELV is another new low voltage LED model – described as one of the most efficient extra low voltage lighting towers on the market.

Compact and easy to transport, it boasts four 300W LED lamps offering a spread of up to 100m. The company said this model offered 165 hours of uninterrupted operation.

And SDMO has launched the first model of its new LED lighting tower – the RL4500-5.

Boasting three 450W LED spotlights, the new model offers low fuel consumption. The LED spotlights are also said to be "extremely" heavy duty and designed for use in tough conditions.

Another new LED model comes from Paclite in the form of the PL-2000 LED Eco. The manufacturer said the principle features of the PL-2000 LED Eco included 8m maximum height, manual rotation through 340º, four 500W LED heads and lifting points for cranes or forklifts.

>



Airstar produces lighting balloon technology, and said the company was seeing a trend towards the use of small, movable lighting towers. Examples include the Flex 1000 W HI-T mounted on a trollywith a 5m telescopic mast, and the Flex 4x1000 W mounted on a lighting tower. Airstar said its technology boasted homogeneous, 360° lighting with no shadow areas or dazzle.

Other advantages include compact transport dimensions and a low operating weight of 750kg. The unit is powered by a 24kW engine.

Ritelite Systems has launched its new 5m working height K50 and 6.5m height K65, available with a range of metal halide or LED light heads. The new models also boast a rapid one-person deployment system – the company said they could be deployed by one person in under three minutes.

New on the halide side of the market is Allmand's Night-Lite Pro II – designed for the European market and featuring two diesel engine options, outlets for auxiliary power, a 50 Hz Alternator (generator), and four 1000W metal halide fixtures. Allmand said it was able to ship twenty units in a forty foot container. The 114 litre fuel tank also provides up to 65 hours of continuous operation.

Compact models

And manufacturers are busy squeezing more lighting power into smaller dimensions – targeting the highly portable end of the market, for instance, is Paladin, which has introduced the Case Light CLU10K, which folds up and fits into a case.

Weighing 7.9kg, the CLU10K offers up to 10000 lumens of LED light for four hours on cordless battery power and can be deployed in under 15 seconds, according to the manufacturer. Brian Richardson, executive vice president of sales, said the aim was to make a quick-deploying, bright and battery-powered light.

"Industrial contractors have increased demand for compact, portable models like the Case Light," he said, adding that LED technology was allowing smaller, more portable designs to be developed. "An item like this reduces the need for additional staff, vehicles and cumbersome equipment. Because of its ability to withstand harsh conditions and quickly access remote locations, unlike heavy and fixed lighting, we also notice a high demand within the law enforcement and first responders communities."

Meanwhile, Generac Mobile Products is offering buyers the opportunity to customise their lighting towers. The company has launched a new version of its Cube+ lighting tower and generator.



Atlas Copco's HiLight B5+ model features a compact box-unit design



New features include an integrated control panel; 24V LED lamps (230V metal halide also available); and a modular design that allows for single, twin or three cylinder engines, plus a hybrid.

The hybrid option comprises a battery pack and single-cylinder diesel engine and renders a running time of around 700 hours on one tank of fuel. In addition, when the unit is operating via the battery pack, the CUBE+ has zero noise output and no carbon emissions, according to Generac. The special dry batteries can be recharged in less than 5 hours and have a 100% guaranteed charge/discharge cycle of more than 4000 hours.

And Generac is seeing brisk demand for its hybrid lighting sets – UK rental company A-Plant, for instance, recently invested in a further 26 Generac VT-Hybrid sets to help its customer Costain with a road-building project. This lighting set also features a battery/diesel system with auto-charging technology.

Costain said it had recorded fuel demand reductions of up to 75% using hybrid units – with total fuel consumption for a 12-hour shift of just 3 litres in some cases. **IRN**



SDMO's RL4500-5 – the first model in its new range



Allmand's Night-Lite Pro II



Morris Site Machinery's SMC TL-90 ELV

General Equipment Company has introduced new temporary lighting products in the form of Tower Lights – a cylindrical load-bearing nylon tower is inflated with constant air pressure delivered by an integral blower system, targeted at the construction, security, event and emergency response markets among others.



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All eyes on Shanghai

Quick facts

WHAT:
4th International Rental Conference (IRC)

WHERE:
Double Tree by Hilton,
Shanghai, China

WHEN:
Monday 21st November, 2016
(Day before Bauma China exhibition)

CONFERENCE BOOKINGS:
Julia Bossie, KHL Group
e-mail: julia.bossie@khl.com

EVENT INFORMATION:
Murray Pollok, KHL Group
e-mail: murray.pollok@khl.com

A string of senior executives from the global rental industry are due to give presentations at the International Rental Conference Asia in November. *IRN* reports.

The line-up for this year's International Rental Conference (IRC) is very strong, with a host of senior figures from the global rental and construction equipment industry scheduled to address attendees.

The conference, organised by *International Rental News (IRN)* and KHL Group, is being held on Monday 21st November in Shanghai, close to the venue for the Bauma China exhibition, which opens the following day on 22nd November.

Taking place for the fourth time, the event has built a reputation as a great venue for networking and education. It is supported by Bauma China, IPAF and the Machinery Management and Rental division of the Chinese Construction Industry Association (CCIA). Around 300 delegates from across the industry are set to attend to hear the latest forecasts and news from the rental industry.

For full details, including how to register, go to www.khl.com/irc **IRN**

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Preliminary programme

MORNING SESSION

08.00 – 09.00
Registration, networking and morning coffee

09.00 – 09.15
WELCOME & OPENING REMARKS:
Conference Chairman:
Murray Pollok, Managing Editor, *International Rental News (IRN)*



09.15 – 09.35
Rental management: building a market leading business
Bill Whitehouse, Chief Operating Officer, Kennards Group, Australia



09.35 – 10.00
Rental metrics: the key performance measures
Gary McArdle, Executive Vice President/Chief Operating Officer, Rouse Services



10.00 – 10.25
China's state owned contractors: changing attitudes to rental
Fei Xiaodong, Vice general Manager, Sales & Operations Director – Jiangsu Xugong Guanglian Machinery Rental Co. Ltd

10.25 -10.55
Morning coffee



10.55 – 11.25
Growing China's rental business: Important lessons from mature markets
Matt Fearon, President, Terex AWP/Genie, USA



11.25 – 11.50
Creating a B2B eCommerce business
Cyril Drouin, Chief eCommerce Officer – Greater China, Saatchi & Saatchi

11.50 – 12.00
Q&A session

12.00 – 13.20
Lunch

AFTERNOON SESSION



13.20 – 13:45
Topic to be confirmed
Xavier du Boÿs, CEO, Kiloutou



13.45 – 14:15
Construction equipment trends: China and the global market
David Phillips, Managing Director, and Karin Sun, Senior Consultant, Off-Highway Research



14.15 – 14.40
Rental trends in Asia; health and safety regulations in China
Desmond Soh, VP/ GM – Asia, JLG Industries

14:40 – 14:45
Q&A Session

14.45 – 15.15
Afternoon tea

FINAL SESSION



15.15 – 15.45
Topic to be confirmed
Norty Turner, CEO, Riwal



15.45 – 16.15
Building a sustainable access rental business in China
Khun Tan, Founder/ Chief Executive, Guangzhou Liluo Mechanical Equipment Leasing Co Ltd

16.15 – 16.20

16.20 – 16.25
CLOSING REMARKS

16.25 – 18.30
Networking Drinks Reception

A record all-rounder

bauma 2016

The largest construction equipment exhibition in the world attracted 580000 visitors, up 10% compared to 2013



Bauma at a glance

VISITORS:
580000 10% on 2013

EXHIBITION SPACE:
605000m²

EXHIBITORS:
3423
1263 from Germany
2160 from 58 countries



Wacker Neuson showcased a cross-section of its products and services, under a new 'W' logo. It said the eye-catching symbol would be the dominant trademark on its products in future.

The total number of visitors to Bauma Munich, the world's biggest construction equipment exhibition, was estimated at a whopping 580000 – a rise of almost 10% on the last event, held in 2013.

The visitors were able to see products from a total of 3423 exhibitors – 1263 from Germany and 2160 from 58 other countries – covering a record 605000m² of exhibition space.

IRN caught up with a number of senior figures from the global rental industry – from leading rental companies to large suppliers to the rental industry – to get their take on current conditions in the market. If you are reading this story on a tablet computer, click on the images with 'play' buttons to view the full interviews.

This is just a brief snap-shot of the many interviews and product launches covered by *IRN* and the KHL editorial team at this enormous show. Go to our dedicated Bauma website www.khl.com/sector/bauma/ for the full details and more news from the exhibition – covering the general construction, access, rental, cranes and demolition sectors.

Speaking to *IRN* at Bauma, Zeppelin Rental CEO Wolfgang Hahnenberg, said the company planned a fleet investment budget of between €100 million and €120 million for 2016, around 50% of which would be spent on construction equipment from Caterpillar, and the other half on the rest of its range, such as AWPs, forklifts, compressors, gensets and much more.

Mr Hahnenberg said the company expected to see flat rental markets in Austria and Germany in 2016, but strong growth in the Czech Republic and Slovakia. "Overall a flat picture for 2016," he explained.

He said Bauma Munich was a very important show for the industry. "Bauma is just great - for me personally it is a great opportunity to see customers, and it's a meeting place for the whole industry. From CEOs to customers and operators, they are all here. And you can also see all the innovations from across the construction industry too."

Improving markets

And for his part, Ulf Böge, marketing director at German rental company HKL, said the company



Zeppelin Rental CEO Wolfgang Hahnenberg, said the company planned a fleet investment budget of between €100 million and €120 million for 2016



Hitachi Construction Machinery Europe launched its new range of rammers, vibratory plate compactors and rollers in Germany – the new range will be offered by nationwide distributor Kiesel

planned to expand amid steadily improving markets. "We expect the German rental market to improve somewhat in 2016," Mr Böge said. "West Germany is seeing more investment than the east – the problem is distribution of government funds."

Meanwhile, on the manufacturing side, Cem Peksaglam, CEO of international light and compact construction equipment manufacturer Wacker Neuson, told *IRN* that there was a global mega trend towards rental.

"We have certain markets that are dominated by rental – the UK, and France for instance – while others have different preferences. But I think that with technological development, we are seeing more and more specialised machines, and people will ask themselves more and more if it is worthwhile to invest in a machine, or if rental is a better option. I think the rental market will grow unstoppably."

For its part, UK-based manufacturer Morris Site Machinery reported strong demand for its lighting towers around the world.

Speaking to *IRN* during the show, managing director Phil Winnington said, "We are here at Bauma Munich for the first time, and are collaborating with rental companies in mainland Europe as well. We've been impressed by the level of interest we've seen from visitors at the show.

"We invest a lot in our research and development activities as well – and, crucially, there is always a seat around the table for the customer in this process. We want to move with our customers and develop products that suit their specific needs."

Expansion

Pump manufacturer Xylem also plans to expand. Patrick Tantum, senior business development manager at Xylem's dewatering growth centre, said the company's current investment priorities in the rental fleet were in Europe and Africa – where the company has opened five rental hubs – but Mr Tantum said there were longer term opportunities in Asia.

"We have plans for Asia, but we can't divulge them now. We have been investing heavily in Europe, and we see a lot of potential in emerging markets, especially with the CapEx to OpEx shift, which is really driving the success of rental for us."





Paclite Equipment launched a range of six hand-held pneumatic breakers in the 5 to 32kg sizes (5, 11, 21, 24, 29, and 32kg). It also expanded its floor saw range with the introduction of a 450mm diameter model – the Speedcut 450



Bergmann Maschinenbau, has made some significant 6 tonne capacity 2060 dumper (pictured) now comes with a Stage IV final engine and the10 tonne capacity tracked 4010 now comes with a new cab incorporating a 180° swivel seat

He said India and China were "definitely" part of the rental strategy; "That's part of our ongoing strategy for the next five years – watch this space and you'll see Xylem develop in those areas."

In Europe and elsewhere, Mr Tantum explained that Xylem was targeting end user customers with its rental services, and in certain cases it was partnering with general rental companies on a pump re-rental basis.

Meanwhile, Henric Andersson, president of construction products at power tool producer Husqvarna, said the rental market was core to the company's business. "Rental companies are very important to us, and depending on the geographical market, we see a large proportion of our tools go into the rental sector. We see this as a growth market."

And Yanmar president Jean-Marc Reynaud also emphasised the importance of the rental market to the manufacturer.

"Large rental companies in Europe – multinationals – account for between 20% and 25% of our machine sales, while including the local and regional rental companies, between 40% and 50% of our machines go to rental buyers," he said.

In March, Finnish rental company Cramo signed an agreement to invest in 800 to 1000 Yanmar compact excavators over two years. Mr Reynaud said the company made this choice after several months of testing.

Total cost of ownership

"Total cost of ownership is the key focus for the rental market and beyond," Mr Reynaud said. "We are also a long-term supplier for other rental buyers such as Loxam, HKL, Kiloutou and many more. The first deals for Yanmar Europe were with rental companies.

"In the UK, we changed our approach to the market in 2013, and we have built a sustainable business model. It's time to get back into UK rental, and we think we have a good product and service offering now for the rental companies here and we are seeing steady growth in this market too," Mr Reynaud added.



New prototype midi excavators on show from Kubota were the KX101-3α4, a 3.6 tonne capacity mini excavator, and the 8 tonne KX080-4α

Meanwhile, Franciso Gracia, executive director of manufacturer Himoinsa, said the company was seeing good momentum in rental markets around the world, and highlighted a recovery in Southern Europe in particular.

"We saw a 15% increase in revenues last year, and forecast growth of between 10% and 15% in 2016," Mr Gracia said. "We are on budget at the end of the first quarter, so we've started well.

"We are seeing increased demand for larger generators around the world, particularly in emerging markets as demand for temporary power increases.

"Big power projects in the Middle East and Africa are driving demand, for instance, while we are also expanding our presence in America, China and India in line with market growth."

Mr Gracia said the European recovery was also continuing, at a slow but steady rate. "We see demand for generators in Southern Europe recovering, making the overall European economy more balanced. Southern European countries are coming back after strong recessions."

Rental equipment deals

There were plenty of equipment deals announced at the show as well. UK rental company Hewden's new chief executive Adrian Murphy confirmed that the company has invested in 21 cranes predominantly over 100 tonnes from manufacturer Tadano. He said the deal, worth around £11 million (€14 million), included two new 220 tonne models.

"We have increased the capacity of our crane fleet to 220 tonnes," Mr Murphy said. "This includes the 220 model with a hydraulic jib for narrower spaces. We're stopping at 220 tonnes for the moment, but I wouldn't limit us to that size crane in the long-term," he said.

And UK rental company HE Services invested in 50 new Hydradig 110W wheeled excavators from manufacturer JCB.

JCB launched the Hydradig at Bauma Munich – described as a digging, lifting, loading and tool-carrying machine for urban construction, highway maintenance and municipal operations.

Meanwhile, Netherlands-based Riwal bought the first 1500AJP from JLG. The 1500AJP features an up-and-over height of 18.3m, a working outreach of 23.5m, platform capacity of 270kg unrestricted and 450kg available through a the vast majority of the working envelope. **IRN**


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Pushing the boundaries

The aerial work platform sector is seeing steady growth in most of its core markets, while targeting emerging markets where there is huge potential. Euan Youdale **reports.**



JLG launched the world's biggest articulated boom at Bauma, the 1500AJP

Tim Whiteman, CEO and managing director of the International Powered Access Federation (IPAF) says the rental sector already purchases more than 80% of all AWPs built each year – with IPAF research showing there are about 1.2 million units owned by rental companies around the world.

He said, "The rental industry is the life blood of the global access industry. It provides a way for companies to quickly obtain a professionally maintained solution for temporary work at height."

The biggest markets for access equipment remain in Europe and North America. According to IPAF, both continents are experiencing steady growth, although in Europe the conditions vary greatly from country to country.

The US report recorded moderate growth of 5% in 2015 to reach approximately US$8.3 billion (€7.4 billion), while the total rental fleet expanded by 3% to exceed 530000 units. Nevertheless, this market has been affected by the slowdown in the oil sector, and as a result the proportion of construction end-markets in AWP rental increased to 73% in 2015.

This slowdown follows enormous growth in AWP fleets in recent times. According to IPAF, there was around 22% growth in rental fleets between 2011 and 2015. But that curve has trailed downwards, and is forecasted at zero for 2016.

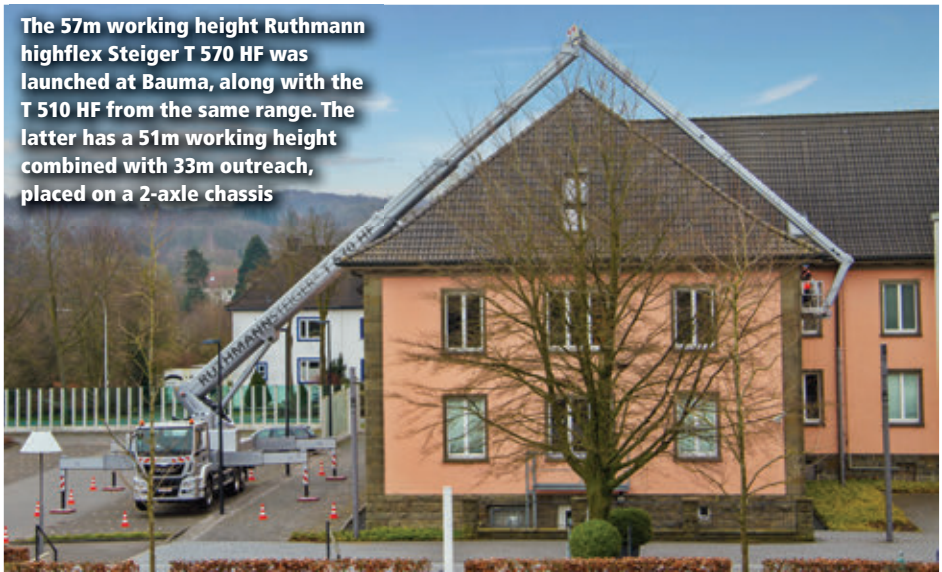
One of the largest access equipment manufacturers in world, JLG's parent group Oshkosh, said earlier this year it was lowering the access equipment segment's outlook for the year following the results of its first quarter of its 2016 financial year. This reflects what it believes will be a more cautious approach to capital expenditures by rental companies than previously anticipated and a more competitive market, due in part to the continued strong US dollar.



Dinolift's 220XSE boom, convertible to a telehandler

And John Garrison, the new CEO of Genie's parent company Terex told KHL at the American Rental Association show in Atlanta in February that he didn't see market conditions improving. He anticipated lower fleet replacement from North American AWP rental companies. And he said the oil and gas and commodity market decline will continue to impact demand across many of its products.

Meanwhile, IPAF's European rental report shows a 3% revenue rise in 2015, estimated at €2.7 billion. Fleet expansion continued at a moderate pace to reach 313000 units. The report says Spain and Italy are seeing the highest growth - well beyond the recession with growth at or above 5% in 2015. This shows considerable progress compared to previous years when revenue declines were the norm.



The 57m working height Ruthmann highflex Steiger T 570 HF was launched at Bauma, along with the T 510 HF from the same range. The latter has a 51m working height combined with 33m outreach, placed on a 2-axle chassis

Sweden and Germany remain growth markets with continuous positive growth at 5%. In comparison, the UK and Norway, traditionally dynamic markets, are showing signs of slower growth.

China

By comparison, China's rental fleet grew by about 35% in 2015 to reach approximately 12200 units, according to IPAF's findings.

This represents huge growth but from a low base in a country that boasts up to 200 aerial work platform manufacturers. In reality there are only around 10 manufacturers that show international aspirations, with most of the others being very small manufacturers of scissor lifts sold in their immediate locality.

Of the top 10, Zhejiang Dingli Machinery (Dingli) has made the first real move into Europe with the purchase of a 20% share in Italian telehandler manufacturer Magni, finalised in February this year.

Under the €14.4 million deal Magni will design a full range of booms for Dingli, which will produce them at its new factory in China. In turn, Dingli is to be a distributor for all Magni products in China.

While huge growth beckons in China and Asia generally, achieving a foothold in the mature markets of North America and Europe is high on the list of any aspiring international player. Conversely, >





Skyjack scissors and booms help paint the marquee at the Illinois baseball team's home stadium green and gold to celebrate its 100th anniversary

manufacturers based in those established markets are keen to find sales in smaller markets that promise future growth.

One such company is Germany-based Ruthmann, a specialist of premium-priced truck mounts, mainly sold in Europe and significantly its domestic market. In a bid to spread its wings, the manufacturer bought a 60% stake in Italy-based Marti Group, a producer of Ram truck mounts and Bluelift tracked platforms.

The arrangement sees the Marti family holding on to the remaining 40% and jointly managing the venture, which has been renamed Ruthmann Italia.

The reasoning behind the deal reflects a broader trend in the AWP sector. Ruthmann managing director Rolf Kulawik says it had been looking for a truck mount manufacturer to provide lower-priced, more basic machines to emerging markets. "The products are important for our strategic approach in new markets in Eastern Europe, Southern Europe, USA, India, the Far East and Middle East."

As a result of the partnership the Ram name will no longer exist, and its products have been renamed the Ruthmann Eco line. The well-known Bluelift name will not be dropped, instead it has been rebranded Ruthmann Bluelift.

The acquisition was announced at Bauma Munich in April, where access manufacturers were out in force with a number of new products. They included the access equipment sector's two biggest manufacturers - JLG and Genie (part of Terex AWP).



Teupen has combined the engineering ingenuity of specialist chassis producer Menzi Muck to create a rough terrain walking excavator chassis topped with an aerial work platform. The 42.7m working height Puma 42 GTX brings the access industry into areas it has never been before. It can be adapted to the terrain while driving even on extreme slopes up to 45°. A powerful 115 kW Deutz engine provides torque,up to 610Nm.

Terex AWP is celebrating its 50th anniversary this, and new products on its booth included a Z-boom designed to offer high rental return on investment. The 15.9m working height Z-45/25XC boom lift is a redesigned larger capacity version of the Genie Z-45/25J RT diesel-powered articulating boom with up to 100% more lift capacity. Standard basket capacity is 300kg as standard, while restricted capacity is up to 454kg. The machine weighs in at 440kg with new design features including a new 1.83m dual-entry platform and reinforced components to support additional weight.

The company also showed its new 20.16m working height articulating Z-60/37 FE hybrid boom. It provides a choice of two operation modes: full-electric, allowing full-day emission-free performance on a single charge, or hybrid mode which provides more than a week of run time on a single tank.

Raising the bar in the articulated boom area was JLG, with the launch of the world's biggest version, the 1500AJP. The first unit was sold on the manufacturer's stand at bauma to the Netherland's-based access equipment rental specialist Riwal. It features include an up-and-over height of 18.3m, a working outreach of 23.5m and platform capacity of 270kg unrestricted and 450kg available through a vast majority of the working envelope.

The 1500AJP, which will be available for shipment in early 2017, also offers a standard 2.4m jib that raises and lowers 135 degrees to provide additional reach and up-and-over capability.



One of Haulotte's Star series of vertical masts



In another acquisition update, Power Towers, a UK-based manufacturer of low level access equipment bought in 2015 by JLG showed its products represented on the JLG stand at Bauma. Related products will still be branded as Power Towers in markets outside North America, while in North America they have been re-branded under the JLG name with new nomenclature.

Low-level sector

Another of the four biggest access equipment manufacturers, Haulotte Group, is also realising the significance of the low level sector. The France-based manufacturer launched the 5.8m working height Star 6 vertical mast. The Star 6 follows on from the Star 8 and 10, launched last year. Star 6 is designed to work in confined working areas, and the new machine was launched in a bid to increase its presence in this area.

This expanding product ranges from the world's leading access equipment manufacturers demonstrates the need to offer a broad choice of products to its rental customers. Essentially, the focus is on flexibility and ease of use on the worksite; for example hybrid machines can be used inside and outside and can be present on a construction site from the beginning to the end of the project. Emissions, whether fuel- or noise-related, are also working their way up access equipment buyers' lists.

All this demonstrates that while these manufacturers are still focused on the high volume scissor and boom lines, they are making more of a noise about niche products. Similarly, specialists in lower volume product lines are typically exploring new areas. For example Finland-based Dinolift, which has traditionally manufactured trailer mounts, but also produces tracked platforms and booms, has been pushing the boundaries of the latter with, again, flexibility being the focus.

Last year Dinolift launched the Dino 220XSE boom lift, which seconds as a remotely operated telehandler with a 500kg capacity. The boom has an extra-large basket, 1.3m x 2.4m, with 350kg capacity to carry three people and extra tools. At Bauma, its features were extended to include optional outriggers for use on slopes up to 12°and for it to be levelled horizontally.

Meanwhile, telehandlers play a complementary role to AWPs and an important role in rental companies' fleets.

This year Skyjack introduced its Tier 4 Final TH series of telehandler and represents a serious attempt to rival the likes of JLG and Genie for which telehandler sales are significant proportion of their business.

Skyjack president, Brad Boehler, said the company is "very serious about being in the telehandler business. We are working on new models that will be released soon." **IRN**



The new hybrid Z-60/37 FE from Genie

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People news FROM THE WORLD'S RENTAL INDUSTRY



■ Chief executive of UK rental company Ardent hire Solutions, **Steve Corcoran**, has stepped down after leading the formation of the company. Ardent was formed by the merger of One Call Hire and Fork Rent – a deal that was struck with private equity backing in August 2015. Former Speedy Hire CEO Mr Corcoran led the management team behind the deal. An Ardent spokesperson said, "It was Steve's vision to bring together One Call and Fork Rent and it was his tenacity that has led to the formation of Ardent Hire Solutions. The Board would like to thank Steve for all his efforts and wishes him well in the future. The board is delighted that Steve will remain with the business as a shareholder and in the capacity of special advisor and is looking forward to drawing on Steve's vast experience in the sector."

■ Magnus Rosén is resigning from Finnish rental company Ramirent and will leave by the end of August. His successor as president and CEO will be **Tapio Kolunsarka**; a senior executive at self-adhesive labelling company UPM Raflatac. Mr Rosén, who joined Ramirent in 2009, said that after "seven interesting years, I feel this is a good time to move on with my career." Mr Rosén will join private investment company Nordstjernan, and is a board member of NCC Housing and Llentab.



■ A new president and CEO of Hitachi Construction Machinery (Europe) has been appointedd – **Makoto Yamazawa**, who is also the new regional CEO for Europe, the Middle East, and North, West and Central Africa. Mr Yamazawa joined Hitachi in 1983, and has held various managerial roles throughout the company.



■ Snorkel UK has appointment **Linda Betts** as sales director. Reporting to Andrew Fishburn, divisional managing director for Snorkel UK, Ms Betts will be based in the East Midlands, with responsibility for developing key account sales. Ms betts joined from Genie Europe.



Hire16 in Australia

Australia's only rental exhibition, Hire16, took place on 5th and 6th May on the Gold Coast.

Organisers said it provided direct connections between people in the business, as well as services and the latest equipment and technology for the rental industry.

"Building relationships and creating new networks is vital in times of economic stress and Hire16 – Connecting People, offers a crucial meeting point for the entire hire industry and associated markets in Australia," said James Oxenham, HRIA CEO.

Hosted by the Hire and Rental Industry Association (HRIA), Hire16 offered a range of networking opportunities at social events as well as daily industry seminars and keynote speakers.

The event took place at the Gold Coast Convention & Exhibition Centre (GCCEC), and also provided live demonstrations outside as well as two days of exhibition display inside, including general hire, access equipment, events, marquees and structure suppliers.

If you are reading the tablet version of the magazine, click on the image to view a gallery slideshow from the event.

HIRE16 Connecting People

IMAGE CREDIT: STEVE RYAN IMAGES

Hotmobil's dual leadership

Mainova group company Hotmobil Deutschland in Gottmadingen, Germany, has announced a management reorganisation that has seen both Mary Biedermann and Michael Kramer appointed as managing directors.

The new leadership duo of the rental specialist for mobile heating, cooling and steam generation units takes over from Christian Hahn who managed Hotmobil since its acquisition by Mainova EnergieDienste in 2010.

Ms Biedermann has been with the company since 2013 as a quality, environmental and safety officer. She was previously a technical consultant to the management and is now the managing director responsible for the technical areas of the company.

Michael Kramer, who is taking over the commercial and sales areas, previously was the department head of the HR Competence Center at Mainova.





■ **Mark Yarnold** has joined King Highway Products as divisional director – access. He will be responsible for all sales and aftersales activities of the SkyKing division within King, a specialist in truck mounts. He joins King following six years at Snorkel, and many years previously in the access industry, and is a member of the IPAF UK council.



■ Terex AWP has appointment **John Chandler** to the position of Genie regional sales manager for the UK and Ireland. Based in Grantham and reporting to Jacco de Kluijver, VP sales & marketing Terex AWP EMEAR, Mr Chandler takes on responsibility for national Genie customer accounts in the UK and Ireland, while managing the UK sales team. Prior to joining the Genie sales team in 2013, Mr Chandler worked for HSS and Hewden followed by the role of strategic accounts manager at Wolsely.

■ Manufacturer Generac named **Ray Caulfield** as its Salesman of the Year for 2015 after he reached the target of selling over one thousand lighting towers during the year. Mr Caulfield, who has been with the company since its inception in 2010, is a well-known and popular character in the rental industry, having been a director of several leading manufacturers of equipment used by many hire organisations.



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KEYNOTE SPEAKER
Bill Whitehouse
Chief Operating Officer – Kennards Group
TOPIC: Rental management: building a market leading business



Matt Fearon
President – Terex AWP/Genie
TOPIC: Growing China's rental business: Important lessons from mature markets



Cyril Drouin
Chief eCommerce Officer, Greater China – Saatchi & Saatchi
TOPIC: Creating a B2B eCommerce business



Desmond Soh
VP/GM - Asia, JLG Industries
TOPIC: Rental trends in Asia; health and safety regulations in China



Gary McArdle
Executive Vice President/Chief Operating Officer – Rouse Services
TOPIC: Rental metrics: the key performance measures



Fei Xiaodong
Vice general Manager, Sales & Operations Director – Jiangsu Xugong Guanglian Machinery Rental Co. Ltd
TOPIC: China's state owned contractors: changing attitudes to rental



Khun Tan
Founder, Chief Executive – Guangzhou Liluo Mechanical Equipment Leasing Co Ltd
TOPIC: Building a sustainable access rental business in China

Please visit the website to view all speakers and find out more information

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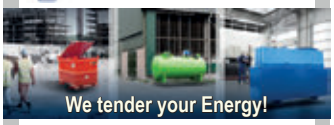


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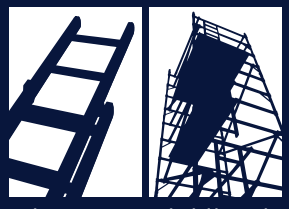


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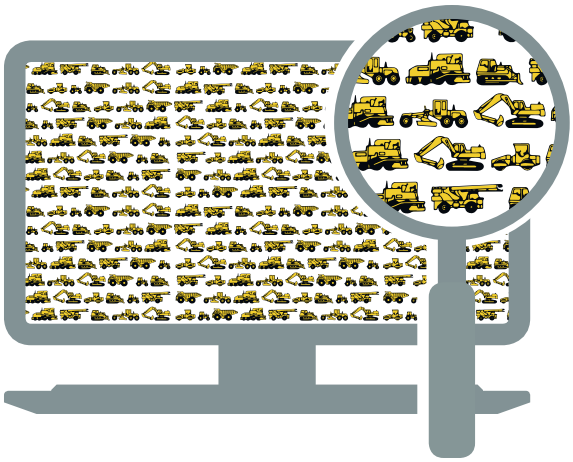
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