

A SPECIAL SUPPLEMENT FOR CONTRACTORS AND OTHER
USERS OF CONSTRUCTION EQUIPMENT WORLDWIDE

REWARDS OF RENTAL



INTERNATIONAL
rental

SEPTEMBER-OCTOBER 2016
A KHL GROUP PUBLICATION

INSIDE: REASONS TO RENT 2 | RENT-OR-BUY: THE COST CALCULATION 5
PRODUCT DESIGN 6 | BIG NAMES IN RENTAL 9 | NOT JUST EQUIPMENT 23

The rewards

With the growing scale and sophistication of the world's equipment rental companies, more and more contractors around the world are choosing to rent rather than own their fleet. This supplement for contractors and other equipment users highlights the beneficial role that rental can play.



The Rewards of Rental is published by *International Rental News (IRN)* magazine as a special supplement for contractors and other users of construction equipment worldwide

EDITOR:
Helen Wright
Tel: +44 (0)1892 786209
E-mail: helen.wright@khl.com

CONTRIBUTING EDITOR:
Murray Pollok
Tel: +44 (0)1505 850043
E-mail: murray.pollok@khl.com

Supplement cover image courtesy Cramo

IRN magazine is available in a variety of formats, including paper and digital tablet editions (for Apple and Android devices)
www.khl.com/subscriptions/irn

We would like to acknowledge the assistance of the European Rental Association (ERA) in producing the supplement (www.erarental.org). *IRN* magazine is solely responsible for the content



It is no secret that contractors operate within tight margins, with intense competition for new work and ever-increasing operating costs. One of the significant components of these costs is buying, maintaining and managing an equipment fleet.

While fleet ownership is still the norm for many contractors around the world, the culture of renting equipment has also been developing and is taking hold in key markets – for instance renting has been the main operating model for the construction industry in the UK for many decades, and the rental sector is also well-established throughout Europe and North America.

In fact, the shift towards renting rather than owning equipment is an established trend in both mature and emerging markets around the world as contractors continue to recognise the benefits of this business model.

There are plenty of advantages to renting rather than owning equipment, from driving operational efficiencies to allowing contractors to punch above their weight when bidding for new work.

Michel Petitjean is the Secretary General of the European Rental Association (ERA), the body that represents around 5000 rental companies in Europe; "At ERA we also see growing recognition of the advantages that renting brings to businesses," he said.

"These include more efficient use of capital, access to a wider range of equipment, expert maintenance and servicing, compliance with regulations, and improved sustainability performance. Intensively used, carefully chosen and well-maintained

equipment on demand can bring real benefits to companies across the continent."

Cost savings

Cost is a key factor of course – renting equipment instead of owning it removes a sizeable burden from a contractor's asset register.

The significant price inflation in recent years associated with buying new machinery, particularly in the North American, European and Japanese markets where new engine regulations have pushed equipment prices higher, makes the prospect of renting even more attractive.

Renting gives contractors access to the most modern, safe and environmentally friendly equipment without the capital outlay. And as far as the rental companies are concerned, having the most up-to-date, reliable equipment on offer is of key strategic importance, and they spend a lot of money to make sure their fleet is in the best condition for rental.

In 2015, the total fleet investment for 25 of the largest rental companies in the world was 7 billion, with the biggest spender – Ashtead (which owns the A-Plant and Sunbelt brands) – investing 1.5 billion, gross, on updating the equipment it offers to contractors.

Renting equipment means that contractors not only have on-demand access to the most advanced machines on the market, but they also avoid the cost and efficiency pitfalls of in-house servicing and maintenance.

The sophistication of much of the latest machinery means specialist engineers are required to maintain

Reasons to rent

FINANCE: Because fleets are not required all the time

Renting helps to avoid the burden of excessive investment, maintenance and other costs. Renting provides you with the equipment when you need it and is more efficient than purchasing and watching your assets depreciate in value while they are not in use.

PRODUCT: The right machine when you need it

The rental industry has specific products for specific jobs, leading to efficiency gains. Rental equipment is regularly maintained, ensuring you have high quality and reliable equipment on site.

SERVICE: You use it when you need it

Renting provides you and your business with flexibility, allowing you to rent for short, medium and long periods. Services include trained and experienced professionals operating the right machine for your job.

STANDARDS & REGULATIONS: Be safe, rent it and avoid the risk

The industry is well regulated and controlled, providing you with peace of mind. The outsourcing of product responsibility and legal compliance costs means that your risk is minimised.

SUSTAINABILITY: Save money and the environment

Rental minimises environmental impact, with increased utilisation efficiency and reduced investment by sharing equipment rather than owning. Rental gives permanent access to modern, efficient equipment. Rental reduces equipment transport costs by efficient logistics and the use of local rental fleets.

(Source: European Rental Association)

of rental

them, and rental companies will provide replacement machines in the interim, avoiding costly downtime.

Many rental companies also offer a range of extra services on top of the equipment, from security tagging to automatic reports on machine performance which can be used for proof of work and quality control (see back page for more information on extra services).

An illustration of these benefits is the work that Finland-based rental company Ramirent is doing with contractor YIT for the massive Tripla construction project in Pasila, Helsinki, the largest current construction project in the country.

Ramirent will supply YIT with equipment and also logistics planning, transport management and chemicals management services. Pekka Luukkonen, YIT's Construction Director at Tripla, said the site was extremely challenging, with road and rail traffic adding to the complexity.

Ramirent will be a true partner on the site; "The project presents many challenges for transport and logistics arrangements, among other things, and with this partnership we wish to ensure that we can take on these challenges together."

Bidding advantage

Contractors which rent all or some of their fleets can also be more flexible when it comes to the kind of projects they work on – with access to a diverse range of up-to-date machinery, they can punch above their weight when bidding for new work, and factor in the cost of rental as part of their bid.

This becomes a great asset especially when there are rapid changes in the market, helping companies to keep their inventory as low as possible when times are lean, and quickly target new work when it becomes available.

Contract awarding authorities are also increasingly stipulating the use of the latest environmentally-friendly equipment on construction sites – specialist low-emission machines like hybrid generators and EU Stage IV-compliant earthmovers are required for projects in London, for instance.

Rental companies specialise in knowing which machinery is right for which jurisdiction, and can support contractors when it comes to preparing bids that fit environmental criteria, without the contractor having to invest in owning costly new equipment.

Sustainability

As well as cost-efficiency and providing access to a modern and safe fleet, renting also has environmental benefits. Rental is increasingly seen as a sustainable business; maximising equipment utilisation and reducing waste – see the sustainability article in this supplement for full details.

And if a contractor does decide that a piece of equipment is essential to own, many rental companies also offer an equity position on a machine, or it is possible for a purchase option to be negotiated.

Put all of this together, and contractors using rented equipment start to look far more efficient, economical and nimble than their fleet-owning competition. The low barrier to entry also makes rental well-suited to the very newest, smallest contractors as well as the largest multinationals. **IRN**

Fast facts



Note: Figures based on 2015 data and estimates from IRN, ERA and American Rental Association

Helping contractors to operate their businesses sustainability

There is an enormous current focus on business sustainability and the 'circular economy' – the concept of an industrial economy that reuses materials, reduces waste and – ultimately – saves money.

The equipment rental industry believes that its business model is well aligned with the goals of the circular economy and that it can help customers who are already committed to sustainable operation or who are being so prompted by their clients.

"Renting is fundamentally sustainable and sits at the very heart of a successful European Circular Economy", said ERA secretary general Michel Petitjean. "Recognition of the environmental and economic advantages that renting brings to business should be an obvious part of any policy making in this area.

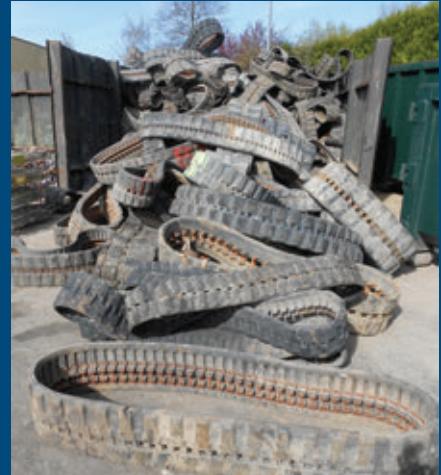
"To get to a truly circular model we need to change how people behave and get a cultural buy-in for innovative rental propositions. In particular, public sector procurement of rental is still too low; tendering rules need to allow 'buying' equipment as a service, not default to treating it as a capital expenditure.

Mr Petitjean added that businesses needed a framework of incentives and targets to make the change to renting equipment; "More support in this area from the Commission would be especially welcome."

The ERA is lobbying the European Commission, the European Union's executive arm, which has adopted an ambitious circular economy plan. Its argument has four pillars:

REUSABILITY

Contractors can access equipment when required, and centralised ownership leads to a more frequent and efficient use of equipment.



REPARABILITY

Feedback from rental companies contributes to product design; facilitating maintenance and repair activities.

RESOURCE USE

Rental companies can specify equipment that offers the most sustainable option to their customers, and they can train workers to operate equipment efficiently.

RECYCLABILITY

Rental companies properly maintain and repair their equipment, and recycle it at the end of its life. They are lobbying OEMs to use materials that can be recycled and to take responsibility for the end-of-life of equipment.

Rental's role in sustainability is one that is already being recognised by contractors. For example, Finnish contractor NCC Roads has rented a range of equipment from rollers to repair containers for asphalt plants from rental company Ramirent to support its road building projects.

NCC Roads managing director Petri Järvensivu said the rental agreement, in addition to being cost-efficient and giving access to a modern and safe fleet, had other benefits; "Renting our fleet also has ecological benefits: we get more users for the same machine, which is in line with NCC's principles of sustainable development".

Further information: www.erarental.org

ERA Sustainability brochure: <http://sustainability.erarental.org/>

EU position on circular economy: [www.ec.europa.eu/environment/circular-economy/index_en.htm](http://ec.europa.eu/environment/circular-economy/index_en.htm)

bauma
China 2016

BAUMA CHINA - NOVEMBER 22nd - 25th
VISIT US: HALL N1 - STAND 211

welcomedit

GENERAC MOBILE PRODUCTS. **SPECIALISTS SINCE 1997.**



LIGHT TOWERS



GENERATORS



PUMPS



DUST CONTROL SYSTEMS

Generac Mobile Products can provide you with a full range of different products for construction, industry and mining sectors, such as mobile lighting towers, dust control systems, vacuum assisted pumps, power generators and much more. **Be different.**

GENERAC® | MOBILE
PRODUCTS

www.generacmobileproducts.com

True cost of ownership?

Which is cheaper, rental or ownership? There is a new online tool that will tell you

Contractors and other equipment users now have an easy to use, free online tool to calculate the real total cost of owning and operating construction equipment. This will allow companies to accurately assess the relative costs of rental versus ownership.

MBA students at the Solvay Brussels School of Economics and Management, working with the European Rental Association (ERA), interviewed equipment users across Europe and used the data to create the Total Cost of Ownership (TCO) calculator.

The ERA Equipment TCO calculator is available online or as an Android or Apple App and is free to



use. Register at <http://equipmentcalculator.org/>.

The calculator can be applied to a broad range of equipment, including the following categories:

- **Wheel loader > 15 t**
- **Track loader > 15 t**
- **Wheel excavator > 15 t**
- **Crawler excavator > 15 t**
- **General construction equipment machine < 15t**



Rental associations

There are more than 30 associations worldwide – including national and multi-national bodies – that represent equipment rental companies. Many of these organisations provide listings of their rental company members on their websites.

EUROPE

PAN-EUROPEAN

European Rental Association (ERA)

www.erarental.org

DENMARK

Dansk Byggeri (Danish Rental Association)

www.materielsektionen.dk

FINLAND

The Association of Finnish Technical Traders

www.tekninen.fi

FRANCE

DLR

www.dlr.fr

GERMANY

BBI

(Bundesverband der Händler und Vermieter von Baumaschinen, Baugeräten, Flurförderzeugen und Arbeitsbühnen)

www.bbi-online.org

ITALY

ASSODIMI

www.assodimi.it

NETHERLANDS

Verhuren Nederland

www.verhurenndnederland.nl

NORWAY

Norwegian Rental Association

www.norskutleforening.no

POLAND

Polish Rental Association

mfelicka@atutrental.com.pl

PORTUGAL

ANAGREI (Associação Nacional de Alugadores de Equipamentos Industriais)

www.anagrei.econstroi.com

ROMANIA

Romanian Rental Association

www.rrarental.org

SPAIN

ASEAMAC

www.aseamac.es

ANAPAT

(aerial platform rental association)

www.anapat.es

SWEDEN

Swedish Rental Association

www.swedishrental.se

HYREX-kedjan kansli

www.hyrex.org

TURKEY

IMDER

(Turkish Construction Machinery Distributors and Manufacturers Association)

www.imder.org.tr

UK

Construction Plant-hire Association (CPA)

www.cpa.uk.net

HIRE ASSOCIATION EUROPE/EVENT HIRE ASSOCIATION

www.hae.org.uk

SCOTTISH PLANT OWNERS ASSOCIATION (SPOA)

www.spoa.org.uk

NORTH & SOUTH AMERICA

USA

American Rental Association (ARA)

www.ararental.org

CANADA

Rental Association of Canada

www.crarental.org

BRASIL

Associacao Brasileira das Empresas Locadoras de Bens Moveis (ALEC)

www.alec.org.br

REST OF THE WORLD

AUSTRALIA

Hire & Rental Industry Association of Australia

www.hireandrental.com.au

CHINA

Machinery Management & Rental Division, China Construction Industry Association (CCIA)

www.zgjzy.org

INDIA

Rental Association of India

c/o Gemini Equipment and Rentals

www.gear-india.com

JAPAN

Japan Construction Machinery Rental Association (JCRA)

www.j-cra.org

NEW ZEALAND

Hire Industry Association of New Zealand

www.hianz.net.nz

SOUTH AFRICA

Contractors Plant Hire Association (South Africa)

www.cpha.co.za

WORLDWIDE ORGANISATIONS

GLOBAL RENTAL ALLIANCE

www.globalrentalalliance.com

IPAF

(International Powered Access Federation)

www.ipaf.org

Designed for rental, and contractors

Contractors and rental companies have a common interest in ensuring that equipment is designed to make sense for both the owner and the final user.

For decades, it has been the organisations representing the major contractors who have taken the lead in lobbying the OEMs about product development and design, but in recent years the increased buying power of the rental sector has meant that its voice is being heard as well.

In the case of the European Rental Association, it has created a Technology committee to coordinate these efforts, and they are starting to bear fruit. A series of face-to-face meetings between OEMs and major rental companies has focused on a number of issues that will benefit both rental companies and contractors.

These issues include the following:

Minimising damage from incorrect use, with examples including:

- Easy to replace broken windows
- Preventing the use of the wrong fuel
- Simple features to ease transport/lifting

Highlighting most common service calls, including:

- Flat tyres
- Empty tanks
- Clogged filters
- Hydraulic hoses

The ultimate aim of these discussions is to make equipment easier to own and operate for rental companies and – importantly – reduce machine downtime, which impacts on both the contractor user and the rental company.

More generally, manufacturers are increasingly open to creating machines that are designed for rental, which means easy to use, maintain and repair. For example, Doosan Bobcat EMEA said the importance of the rental market has been one of the primary factors guiding the design of the company's latest generation telehandlers.

Cost savings

Design for rental applies to all of the models in the latest generation of Bobcat telehandlers with lifting heights from 6-18 m.

Lower total cost of ownership features such as hydrostatic transmissions (for ease of operation, lower maintenance costs and simplicity of design) and long maintenance intervals (for lower servicing and parts costs) have been combined with ergonomic and intuitive controls, simplified operator manuals, easy tie down, lifting points and so on for the benefit of rental businesses.



Quentin d'Herouël, product manager for telescopics at Doosan Bobcat, said, "The Bobcat telehandler range has been renewed to better take into account the requirements of rental companies, especially on machines with lifting heights from 10 to 18 m."

He says the new 3.5 tonne capacity T35130S/SL and T35140S telehandlers, for example, were designed with attention to the protection of vulnerable parts and to allow intuitive and safe operating.

This is just one example of how equipment manufacturers and the rental sector are working together to create machines that are appropriate for the market. And the crucial factor is that good for rental means lower costs and increased uptime, which is good for customers too.

PRESSENTED BY
DOOSAN

STARRING
MID RANGE

SIMPLICITY WORKS
WHEN IT COMES TO PERFORMANCES IN TIGHT SPACES...

With a COMPACT SWING RADIUS THAT'S IDEAL FOR TIGHT SPACES, THE DX165W-5 & DL220-5 ARE UNBEATABLE WHEN IT COMES TO DELIVERING STABILITY AND LIFTING CAPACITIES. EXTREMELY PRECISE, POWERFUL & SMOOTH, THEY'RE DESIGNED TO PERFORM LIKE OUR CONVENTIONAL MODELS IN THE SAME CLASS. ADD LOW FUEL CONSUMPTION - AND NO DPF! - AND THESE MODELS ARE YOUR BEST CHOICE FOR RETURN ON INVESTMENT. DOOSAN, CREATING CONSTRUCTION EQUIPMENT FOR OVER 40 YEARS.

products.doosanequipment.eu





BIBI 870-BL EVO

7.9m Working Height
250Kg Basket Capacity
Extendable and Foldable Basket
Kubota Diesel Engine
Electric Pump 220V-2.2KW or Bi-Energy Lithium Power Pack
Electric Power Generator 220V-1000W
Radio Remote Control
Display with Self-Diagnosis
Easy-Drive and Direction-Control systems

Dynamic & Automatic Levelling while Driving:
+20° / -16° on longitudinal and +15° / -15° on lateral side

Expand your vision, lift your business.

ADAPTED TO BE STRONG, VERSATILE AND RELIABLE

RR

**RENTAL
RANGE**

The INMESOL RENTAL RANGE provides ample and reliable power where and when it's needed.



www.inmesol.com

INMESOL, S.L. / HEAD OFFICE

Carretera de Fuente Álamo, 2 / 30153 CORVERA · Murcia / SPAIN
Phone: +34 968 380 300 | +34 968 380 879 | Fax: +34 968 380 400

inmesol@inmesol.com

Follow us on:



POWER SOLUTIONS
INMESOL

Big names in rental

Who do you call to rent equipment? Here we provide details on some of the largest rental operations in the world, businesses that will rent everything from power tools and compressors to large excavators and shoring equipment.

There are many thousands of local 'mom and pop' rental businesses around the world – after all, construction remains a fragmented, localised industry. But the largest rental houses have extensive branch networks and the widest ranges of equipment and services, so we have focussed on where these companies are, and what they offer.

These big firms are not the only option – reputable small and medium sized rental companies can be found in most towns and cities – but they represent a good starting point for a contractor looking to

supplement their fleet by renting, or to switch entirely to the rental model. Turn to page 5 for a list of rental associations, providing access to thousands of other rental companies around the world.

Here we have provided a selection of the biggest names in each broad region and product sector.

It is important to note that these major players comprise both rental generalists, which offer a broad range of general construction equipment and tools, and specialists, which target a particular product, such as access platforms, power or pumps.



TEN OF THE LARGEST EUROPEAN RENTAL COMPANIES					
COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
A-PLANT	UK	Construction equipment, tool hire, access equipment, modular space, power	150	London, UK	www.aplant.com
BOELS VERHUUR	12 countries across Europe	Construction equipment, tool hire, access equipment, modular space, power, cranes	350	Sittard, Netherlands	www.boels.com
CRAMO	Northern, Central & eastern Europe, Russia	Construction equipment, tool hire, access equipment, modular space, power	328	Vantaa/Helsinki, Finland	www.cramo.com
HSS HIRE	UK/Ireland	Construction equipment, tool hire	300	Mitcham, UK	www.hss.com
KILOUTOU	France, Poland, Germany	Construction equipment, tool hire, access equipment, modular space, power	475	Marcq en Baroeul, France	www.kiloutou.fr
LIEBHERR MIETPARTNER	Germany, France, Austria, UK, Switzerland	Construction equipment	134	Ludwigshafen, Germany	www.liebherr.com
LOXAM	France, Ireland, UK, Denmark, Germany, Spain, Belgium, Switzerland, Luxembourg, Morocco, Brazil.	Construction equipment, tool hire, access equipment, modular space, power	668	Paris, France	www.loxam.com
RAMIRENT	Finland, Sweden, Norway, Denmark, Russia, Estonia, Latvia, Lithuania, Poland, Hungary, Ukraine, Czech Republic, Slovakia	Construction equipment, tool hire, access equipment, modular space, power, cranes	288	Vantaa, Finland	www.ramirent.com
SPEEDY HIRE	UK & Ireland, Middle east, North Africa	Construction equipment, tool hire, access equipment, modular space, power, HVAC	206	Newton-le-Willows, UK	www.speedyservices.com
ZEPPELIN RENTAL	Germany, Austria, Czech Republic, Slovakia, Russia	Construction equipment, tool hire, access equipment, modular space, power, cranes, party/events	135	Garching (Munich), Germany	www.zeppelin-rental.com

TEN OF THE LARGEST NORTH AMERICAN RENTAL COMPANIES

COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
AMECO	Americas, Asia Pacific	Construction equipment, access equipment, power	36	Greenville, SC, US	www.ameco.com
BLUELINE RENTAL	US, Canada	Construction equipment, access equipment, power	140	The Woodlands, Texas	www.bluelinerental.com
H&E EQUIPMENT SERVICES	US	Construction equipment, access equipment, power	76	Baton Rouge, Louisiana	www.he-equipment.com
HERC RENTALS	US, Canada	Construction equipment, tool hire, access equipment, power, HVAC	280	Bonita Springs, Florida, US	www.hercrentals.com
HOME DEPOT	US, Canada, Mexico	Construction equipment, tool hire	1275	Atlanta, Georgia, US	www.homedepot.com
NEFF RENTAL	US	Construction equipment, tool hire, access equipment	66	Miami, FL, US	www.neffrental.com
NES RENTALS	US	Construction equipment, access equipment, cranes	75	Deerfield, IL, US	www.nesrentals.com
SUNBELT RENTALS	US, Canada	Construction equipment, tool hire, access equipment, power, HVAC	550	Fort Mill, South Carolina, US	www.sunbeltrentals.com
SUNSTATE EQUIPMENT	US	Construction equipment, tool hire, access equipment	60	Phoenix, AZ, US	www.sunstateequip.com
UNITED RENTALS	US, Canada	Construction equipment, tool hire, access equipment, modular space, power, HVAC	897	Greenwich, Connecticut, US	www.unitedrentals.com

>

**ONE PORTFOLIO.
ENDLESS POSSIBILITIES...**

Come and see for yourself @ www.atlascopco.com

Sustainable Productivity

Atlas Copco





The highway to success
is always under construction

Rent the future

LOXAM, No. 1 in rental equipment
for construction and powered access in Europe

Belgium, Denmark, France, Germany, Ireland, Luxembourg, Morocco,
Netherlands, Norway, Spain, Switzerland, United Kingdom.

**RIWAL**

Going for top performance, wherever you are.

When you're aiming for the top, you require a specialist in solutions for working safely and efficiently at heights. With a rental fleet of over 13,000 aerial work platforms, telehandlers and forklift trucks Riwal offers you high quality equipment and service for every job to be done.

With operations in 17 countries and a network of partners, we can provide solutions in practically any country anywhere in the world. We make it easier for you to focus on the things you do best, ensuring you have the equipment and support needed to get the job done.

AERIAL WORK PLATFORMS • TELEHANDLERS
rental • sales • maintenance • parts • training

Rental Desk: +31 (0)88 - 618 18 00

Website: www.riwal.com

Email: info@riwal.com

Above all. Riwal



FIVE OF THE LARGEST JAPANESE RENTAL COMPANIES

COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
AKTIO CORP	Japan, Thailand, Singapore, Malaysia, and Taiwan	Construction equipment, access equipment, tool hire, power	705	Tokyo, Japan	www.aktio.co.jp/en/
KANAMOTO	Japan, China, Hong Kong, Singapore, Indonesia, Thailand, Vietnam, Philippines	Construction equipment, tool hire, access equipment, power	445	Sapporo, Japan	www.kanamoto.co.jp
NIKKEN CORP	Japan, US, Thailand, UAE, Indonesia, Myanmar	Construction equipment, access equipment	186	Tokyo, Japan	www.rental.co.jp/english
NISHIO RENT ALL CO	Japan, Malaysia, Thailand, Singapore, Vietnam, Australia	Construction equipment, tool hire, access equipment, power, party/events	368	Osaka, Japan	www.nishio-rent.co.jp
TAIYO KENKI RENTAL	Japan	Construction equipment, access equipment	110	Shizuoka, Japan	www.taiyokenki.co.jp

This split between generalists and specialists doesn't really tell the full story, because many of the bigger general rental companies have established separate divisions for these 'specialist' products, in recognition of the extra skills and knowledge that they require. So the benefits of being a specialist are recognised by the generalists themselves.

It should be remembered that portable generators are mainstays of most generalist rental company fleets, for instance, so the table highlighting the

temporary power specialists is focussing on those companies that solely offer power rentals – for instance larger temporary power station, long-term rental projects, like those which Aggreko and APR Energy target.

Similarly with the portable accommodation and storage specialists – many generalist rental companies such as Cramo and Ramirent also offer portable accommodation through dedicated subsidiaries, but this separate table just lists those

rental houses that focus solely on these products.

The data for these lists has been drawn from *International Rental News (IRN)*'s annual IRN100 ranking of the largest 100 rental companies in the world, while selected additional information for the access specialists table has been drawn from *IRN*'s sister publication *Access International*'s annual ACCESS50 ranking of the largest 50 access rental companies in the world.

The largest 100 rental companies in the world >



**High Quality
Industrial
Powerwashers
designed and
built for the
rental industry**

Hot & Cold Bowserwashers - 100 to 500 Bar



TEN OF THE LARGEST RENTAL COMPANIES IN THE REST OF THE WORLD

COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
AJ NETWORKS	Korea, Vietnam, Saudi Arabia	Construction equipment, access equipment	40	Seoul, South Korea	www.ajurental.com/eng
BYRNE EQUIPMENT	UAE, Qatar, Saudi Arabia, Oman	Construction equipment, modular space, power, party/events	13	Dubai, UAE	www.byrnerental.com
COATES HIRE	Australia, Indonesia	Construction equipment, tool hire, access equipment, modular space, power	238	Sydney, Australia	www.coateshire.com.au
EMECO HOLDINGS	Australia, Canada, Chile	Heavy construction and mining equipment	8	Perth, Australia	www.emecogroup.com
KENNARDS HIRE	Australia, New Zealand	Construction equipment, tool hire, access equipment, modular space, power, party/events	140	Sydney, Australia	www.kennards.com.au
MADISA	Mexico	Construction equipment	44	Monterrey, Mexico	www.madisa.com
MILLS ESTRUTURAS E SERVIÇOS DE ENGENHARIA	Brazil	Construction equipment, power	51	Rio de Janeiro, Brazil	www.mills.com.br
SHANGHAI PANGYUAN RENTAL	China	Construction equipment, cranes		Shanghai, China	www.pangyuan.com
SK RENTAL GROUP	South America	Construction equipment	25	Santiago, Chile	www.skrental.cl
ZAHID GROUP	Saudi Arabia	Construction equipment, power	24+	Jeddah, Saudi Arabia	www.zahidcat.com

Bobcat
One Tough Animal.

A bright new day in the city...

But this job's so big and complex...

Here at the construction site, we're building the future.

GREAT TEAMWORK!

We'll clean this mess & clear the way for the new constructions in no time!

AMAZING TEAMWORK

THE BOBCAT LOADERS ROAR INTO ACTION: SCOOPING UP DEMOLITION DEBRIS WHILE THE MINI EXCAVATOR KNOCKS OLD CONCRETE OUT WITH A SINGLE PUNCH. THE TELESCOPIC HANDLER MOVES CLEAN NEW COMPONENTS INTO PLACE. NEVER SAW A FASTER, SAFER CONSTRUCTION RESULT. BOBCAT IS IMPRESSIVE!

Up next... Bobcat 'Tough Jobs'

www.bobcat.com

DOOSAN

Bobcat is a Doosan Company. Doosan is a global leader in construction equipment, power & water solutions, engines, and engineering proudly serving customers and communities for more than a century. | Bobcat and the Bobcat logo are registered trademarks of Bobcat Company in the United States and various other countries. ©2016 Bobcat Company. All Rights Reserved.



1st class in 2nd hand Equipment



Your online search tool for
used equipment: **mef.tvh.com**



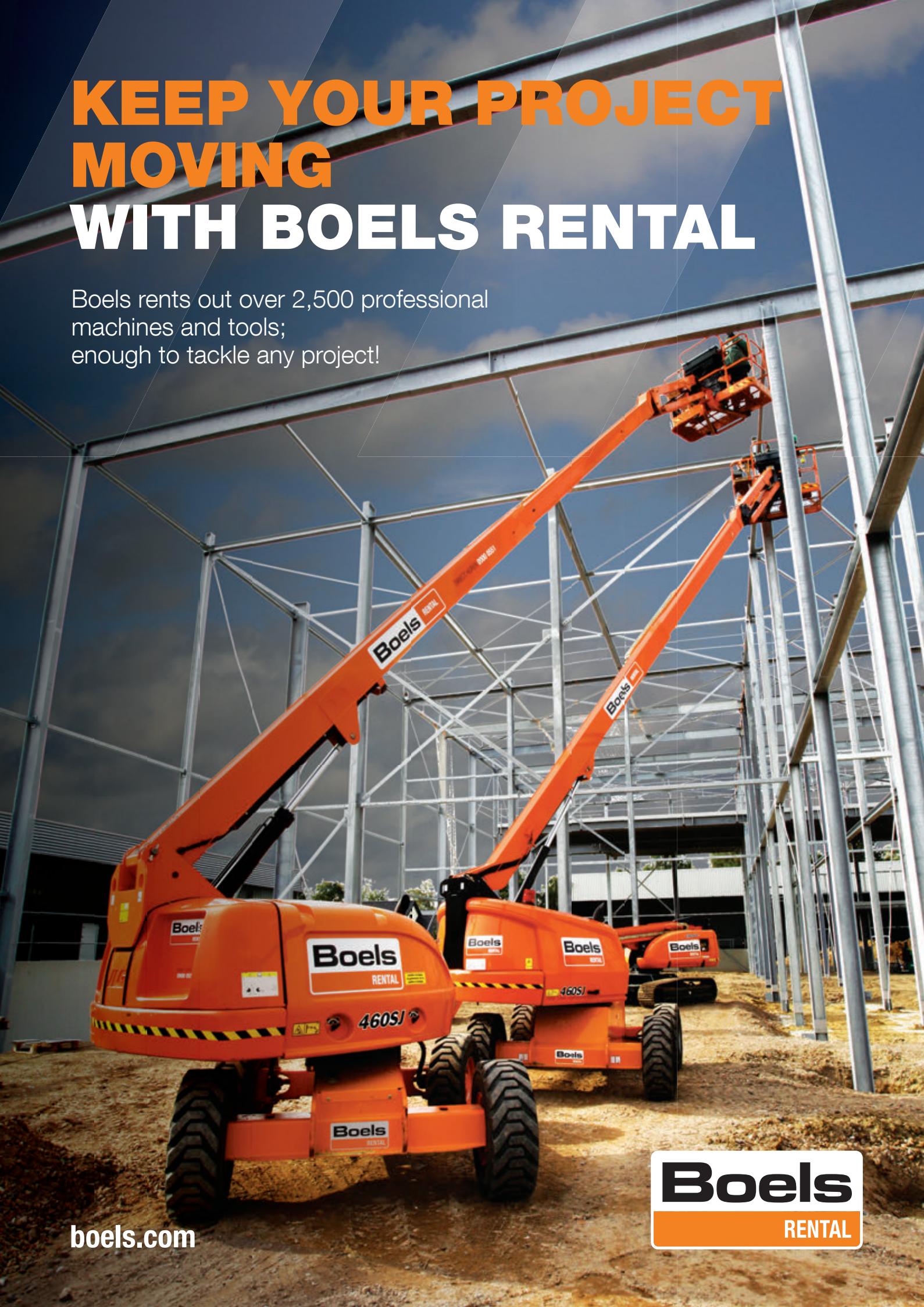
TVH EQUIPMENT NV · HEAD OFFICE WAREGEM
Brabantstraat 15 · 8790 Waregem · Belgium
T +32 56 43 42 11 · F +32 56 43 43 45 · waregem@tvh.com · www.tvh.com

A company of



KEEP YOUR PROJECT MOVING WITH BOELS RENTAL

Boels rents out over 2,500 professional machines and tools; enough to tackle any project!



boels.com

Boels
RENTAL



MAJOR CRANE SPECIALISTS

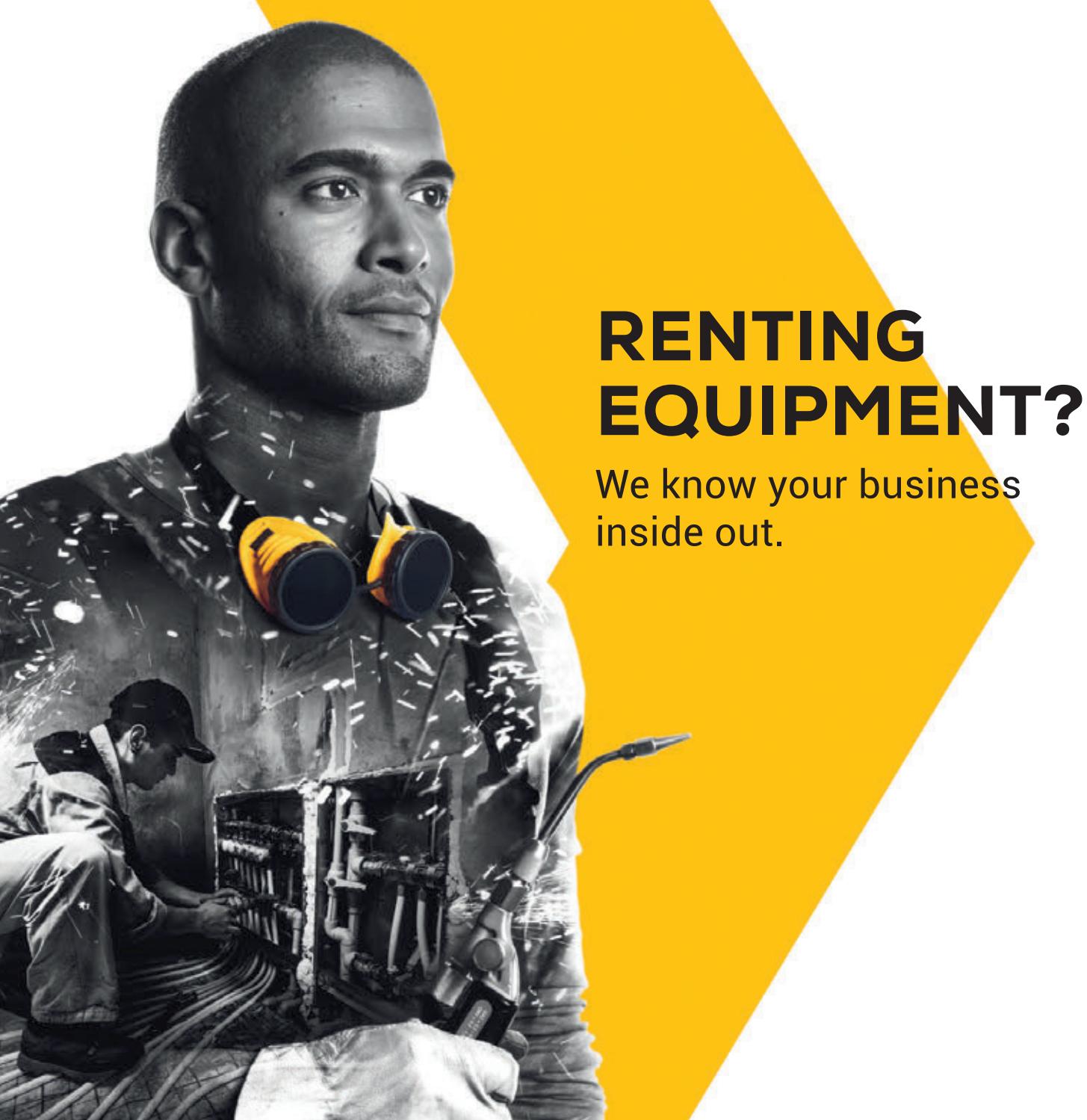
COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
AINSCOUGH CRANE HIRE LTD	UK	Range includes heavy cranes, all-terrain models, city and small cranes	29	Wigan, UK	www.ainscough.co.uk
ALL FAMILY OF COMPANIES	US, Canada	Range includes rough terrain, truck-mounted and tower cranes	38	Cleveland, Ohio	www.allcrane.com
AMQUIP CRANE CORP	US, Canada, Mexico, Puerto Rico	Range includes rough terrain, truck-mounted and tower cranes	15	Philadelphia, PA, US	www.amquip.com
MAMMOET HOLDING	Worldwide	Offering a wide range of crane rental and specialised transport	90	Schiedam, Netherlands	www.mammoet.com
MAXIM CRANE	US	Range of cranes, rigging services and specialised transport	31	Bridgeville, PA, US	www.maximcrane.com
MEDIACO	France, Germany, Africa	Range includes crawler cranes, truck mounted cranes, and tower cranes	60	Marseille, France	www.mediaco.fr
NCSG	Canada, US	Offering a wide range of crane rental and specialised transport	27	Alberta, Canada	www.ncsg.com
SARENS	63 countries worldwide	Range includes giant grance, lattice boom cranes and tower cranes	106	Wolvertem, Belgium	www.sarens.com
TAT HONG	Singapore, Malaysia, Thailand, Hong Kong, Vietnam, Indonesia, Myanmar, Papua New Guinea	Cranes, tower cranes, construction equipment and specialised transport	100	Singapore	www.tathong.com
TNT CRANE & RIGGING	US	Range includes crawler cranes, gantry jacks and sliders, and rigging materials	38	Houston, US	www.tntcrane.com



MAJOR PORTABLE STORAGE/ ACCOMMODATION SPECIALISTS

COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
ADCO	56 countries worldwide	Portable toilets and welfare units	30	Ratingen, Germany	www.adco.de
ALGECO SCOTSMAN	More than 37 countries in Europe, North America, Middle East, Brazil, Australia/New Zealand and Asia	Temporary accommodation, portable modular space/storage units	239	Baltimore, Maryland, US	www.algecoscotzman.com
McGRATH RENTCORP	US, Canada	Temporary accommodation, portable modular space/storage units	22	Livermore, California	www.mgrc.com
MOBILE MINI INC	US, Canada, UK, Netherlands	Portable modular space/storage units, temporary accommodation (UK only)	159	Tempe, AZ, US	www.mobilemini.com
MODSPACE	US, Canada	Temporary accommodation, portable modular space/storage units	80	Berwyn, PA, US	www.modspace.com
PORTAKABIN	UK, Ireland, Netherlands, Belgium, France	Accommodation rental, modular space, party/events	50	York, UK	www.portakabin.co.uk

Note: These companies are specialists in the rental of portable storage/accommodation. These products are also rented by non-specialist rental companies – see main lists by regions.



RENTING EQUIPMENT?

We know your business inside out.

WE'RE EASY TO FIND, WITH MORE BRANCHES THAN EVER BEFORE.

- » 3,650 expert advisers at your service every day
- » 475 branches in 4 countries (France, Poland, Spain, Germany)



CONTACT YOUR NEAREST BRANCH, OR VISIT KILOUTOU.COM

FOLLOW US [WiKi Mat](#)



MAJOR POWER SPECIALISTS

COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
AGGREKO	100 countries globally	Power, temperature control and compressor rental	204	Glasgow, UK	www.aggreko.com
APR ENERGY	Global	Power, temperature control	9	Jacksonville, Florida	www.aprenergy.com
ATLAS COPCO SPECIALTY RENTAL DIV.	65 countries worldwide	Compressors and generators	20	Houston, US	www.atlascopco.com/rental
CARRIER RENTAL SYSTEMS	UK, US, Germany, France, Holland, Poland, Singapore	Temperature control, pumps, generators, party/ events	8	Leatherhead, Surrey, UK	www.carrierrentalsystems.co.uk
ENERGSTY BV	Europe, South Africa, Chile, Argentina	Power, temperature control	6	Breda, Netherlands	www.energsty.com
RENTAL SOLUTIONS & SERVICES (RSS)	Middle East, Pakistan, Africa, Cyprus.	Power, temperature control, water desalination	10	Dubai, UAE	www.rss.ae
SOENERGY INTERNATIONAL	Latin America, Middle East, Africa	Power	40	Miami, Florida, US	www.soenergy.com

Note: These companies are specialists in the rental of power/temperature control. These products are also rented by non-specialist rental companies – see main lists by regions.



Genuine quality, **no compromise**

Tried, tested and proven
protection for your engine

You want to give your engine the best possible protection. Only Perkins filters are designed and developed to meet Perkins exact engine specifications, then rigorously tested in real-life conditions to ensure long-lasting performance.

So why compromise? Choose Perkins filters every time.

 **Perkins®**

MAJOR ACCESS SPECIALISTS

COMPANY NAME	AREAS OF OPERATION	TYPE OF RENTAL	NUMBER OF DEPOTS 2015	HEAD OFFICE	WEBSITE
ACCES INDUSTRIE	France	Access equipment, construction equipment	30	Tonneins, France	www.acces-industrie.com
AFI	UK, Middle East	Access equipment, construction equipment, cranes	31	Iver, UK	www.afi-uplift.co.uk
AHERN RENTALS	US	Access equipment	78	Las Vegas, Nevada, US	www.ahern.com
COLLÉ RENTAL & SALES	France, the Netherlands, Germany, Belgium	Access equipment, construction equipment, modular space, cranes, HVAC	14	Sittard, Netherlands	www.colle.eu
HUNE	Spain, Portugal, France, Saudi Arabia, Colombia	Access equipment, construction equipment, modular space	39	Madrid, Spain	www.hune.com
LAVENDON GROUP	UK, Germany, France, Belgium, UAE, Oman, Bahrain, Qatar, Saudi Arabia, India	Access equipment	70	Lutterworth, Leicestershire, UK	www.lavendongroup.com
PARTNERLIFT	Germany, Switzerland, Ireland, Poland	Access equipment, construction equipment, cranes	140	Germany-wide	www.partnerlift.com
PEKKANISKA GROUP	Finland, Sweden, Russia, Ukraine, Baltics	Access equipment, cranes	27	Vantaa, Finland	www.pekkaniska.com
RIWAL	Netherlands, Belgium, Denmark, Sweden, Norway, UK, Germany, France, Poland, Spain, Slovenia, Croatia, UAE, Qatar, India, Brazil, Kazakhstan	Access equipment, power, construction equipment	59	Dordrecht, Netherlands	www.riwal.com
SYSTEMLIFT	Germany	Access equipment, construction equipment, cranes	70+	Germany-wide	www.systemlift.de

Note: These companies are specialists in the rental of aerial platforms. These products are also rented by non-specialist rental companies – see main lists by regions.

produced €20.4 billion in revenues in 2005, when IRN first began the data gathering project. This figure has jumped 94.6% in the intervening years to €39.7 billion for 2015, the most recent IRN100 ranking year.

This gives an idea of the growth of the rental model around the world over the last decade, as tracked by IRN's analysis of the largest 100 companies in this

market. We are constantly updating and refining our data to make it as accurate as possible.

IRN estimated that the total world rental market was worth around €80billion in rental revenues in 2015, meaning that the largest 100 companies in the world accounted for over 50% of the market.

While rental is well established in developed markets like North America, Europe and Japan, it is

also gaining popularity in other regions around the world as well.

The rental industry as a whole is proving itself to be a global growth market amid what many believe is a permanent shift in behaviour towards the more flexible rental model around the world, over the rigid and capital-intensive equipment ownership option for contractors and other end-users. **IRN**

The rental industry as a whole is proving itself to be a global growth market amid what many believe is a permanent shift in behaviour towards the more flexible rental model around the world.



KNOWLEDGE IS POWER



Puts the power in your hands.

JCB LiveLink gives you complete control of your generators to keep the power on!
LiveLink improves productivity, maximises uptime and makes it easy to manage the health of your generators by providing essential operational data. The most up-to-date information about how your generators are performing or where they are located becomes even more critical when it comes to making the right decisions. The more knowledge you have to generate uptime, the better value for money your generators deliver.

To find out more visit our website.

www.jcb.co.uk/livelinkgenerators

JCB
POWER PRODUCTS

Hewden in the UK uses telematics to provide its customers with machine operating data. This is its depot in Bristol, UK.

Not just equipment

The modern rental company isn't finished when it rents you some equipment. Many will now offer contractors a wide array of other services, and some that may surprise you. Murray Pollok reports.

Twenty years ago if you discovered a rented mini excavator stuck away in a corner of your site, unused for weeks, you would have faced a hefty rental bill. Today, you're more likely to get a reminder text message from the rental company on the day it is due to be returned and a follow-up telling you when to expect pick-up.

That small example is illustrative of a rental industry that has dragged itself into the 21st century. Forced by competition to modernise and innovate, rental companies now offer a broader service – beyond just equipment – and in a more efficient way, often backed by new mobile and digital technologies.

There are many ways that rental companies are innovating to help their customers, but here are some of the main current trends:

Fleet management

The example of the forgotten mini excavator on your site is an important one. Now, most rental firms will provide their customers with real-time information on fleet management, asking them to provide off-rent dates in advance and alerting customers when a piece of machinery is due to be returned.

This is achieved through the use of customer Apps or online management tools, giving customers detailed information on the location and cost of the equipment they have on rent. One example is the Access4U customer portal developed by Netherlands-based rental company Riwal.

The latest telematics systems also allow rental companies – such as Hewden in the UK – to show their customers exactly where their equipment is operating, as well as data such as operating hours, fuel use, engine performance etc.

Online rentals

Linked to this kind of technology is the ability to rent and off-rent equipment online, in real-time. HSS in the UK was one of the pioneers in this regard, but most of the world's biggest rental companies are now investing in similar systems, more recently United Rentals in the US.

These tools are also capable of being linked directly to the accounting systems of customers, allowing seamless electronic invoicing and financial management.

In providing this service, rental companies are also responding to the rise of 'Uber' or 'Airbnb' type

online rental portals, where third party providers allow customers to seek quotes from a wide number of suppliers simultaneously on a single platform. BigRentz in the USA is one of these, while erento in Europe is another.

Some rental companies are working with these portals – allowing their equipment to be sourced from the sites – while others are creating their own portals in an attempt to compete: such is the case with Klickrent, the online rental portal created by Zeppelin in Germany, owner of Zeppelin Rental.

On-site rental locations

For major clients or projects, rental companies can provide dedicated staff and rental locations. This kind of arrangement is common with major petrochemical or oil and gas sites, where a rental company may have a depot and staff permanently on-site during a turnaround.

Or, as with the case with A-Plant in the UK and client VINCI Construction, the rental company may establish a dedicated hire desk within the client's head office. In this case five A-Plant staff operated a hire desk at VINCI's office in Widnes, UK, to manage rental transactions as part of a five year rental agreement.

Safety and training

As equipment specialists, it makes sense for rental companies to offer their experience to train their customers' employees. There are rental companies in the UK, for example, who are training many thousands of equipment operators each year, often in dedicated training centres.

Rental companies will also provide training at a customer's facility or site or hold customer open days to showcase safe practices and equipment, often linked to new legislation.

Specialist equipment/engineering services

Rental companies are also able to provide specialist equipment or engineering know-how. For example, power rental companies have been at the forefront in developing the use of hybrid generator sets –

A-Plant is one of the UK rental companies working to raise the standards of customer service in the rental industry.

using a combination of battery and engine power to minimise emissions, noise and fuel use. Likewise, electric powered mini excavators or hybrid aerial platforms are finding their way into the market through rental fleets.

Sometimes these services can go further, such as in pump rentals or trenching systems. Pump rental suppliers such as Xylem are able to provide a complete engineering solution to a dewatering or sewer bypass project, while a company like Groundforce in the UK will rent hydraulic struts for a temporary shoring job but also create a detailed engineering plan as well.

Zeppelin Rentals in Germany is taking this concept a stage further, providing a detailed logistical planning service to contractors, covering a range of support from site layouts, to material delivery schedules and equipment sourcing.

CSR goals

As we have described elsewhere in this supplement, rental can be described as a sustainable activity, part of the push towards a 'sharing' economy. One aspect of this is that rental companies are able, through the equipment that they buy and the way that they operate, to play a part in a contractor's own Corporate Social Responsibility (CSR) goals.

For example, Kiloutou in France now provides carbon footprint information on all of its invoices, giving a contractor the data it requires to meet its own sustainability targets.

A-Plant in the UK, meanwhile, is pioneering the employment of women as part of its extensive apprenticeship programme.

The best rental companies are committed to operating sustainably and in accordance with wider CSR aims. This makes it easier for contractors to achieve their own targets.

Who said equipment rental was just about equipment? **IRN**





Chicago
Pneumatic

Performance. Toughness. Versatility

Complete On-site Solutions



www.cp.com

People. Passion. Performance.