

The European Distribution Industry



José Gameiro, President
European Confederation of Equipment Distributors
(E.C.E.D.)



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RENTAL
ASSOCIATION

E.C.E.D. – JOSÉ GAMEIRO

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“I would like to thank ERA
for inviting the Distribution Industry
to start sharing your concerns
and I look forward
to discussing about the solutions
the Rental market requires.”



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DISTRIBUTOR OF JCB & JCB VIBROMAX



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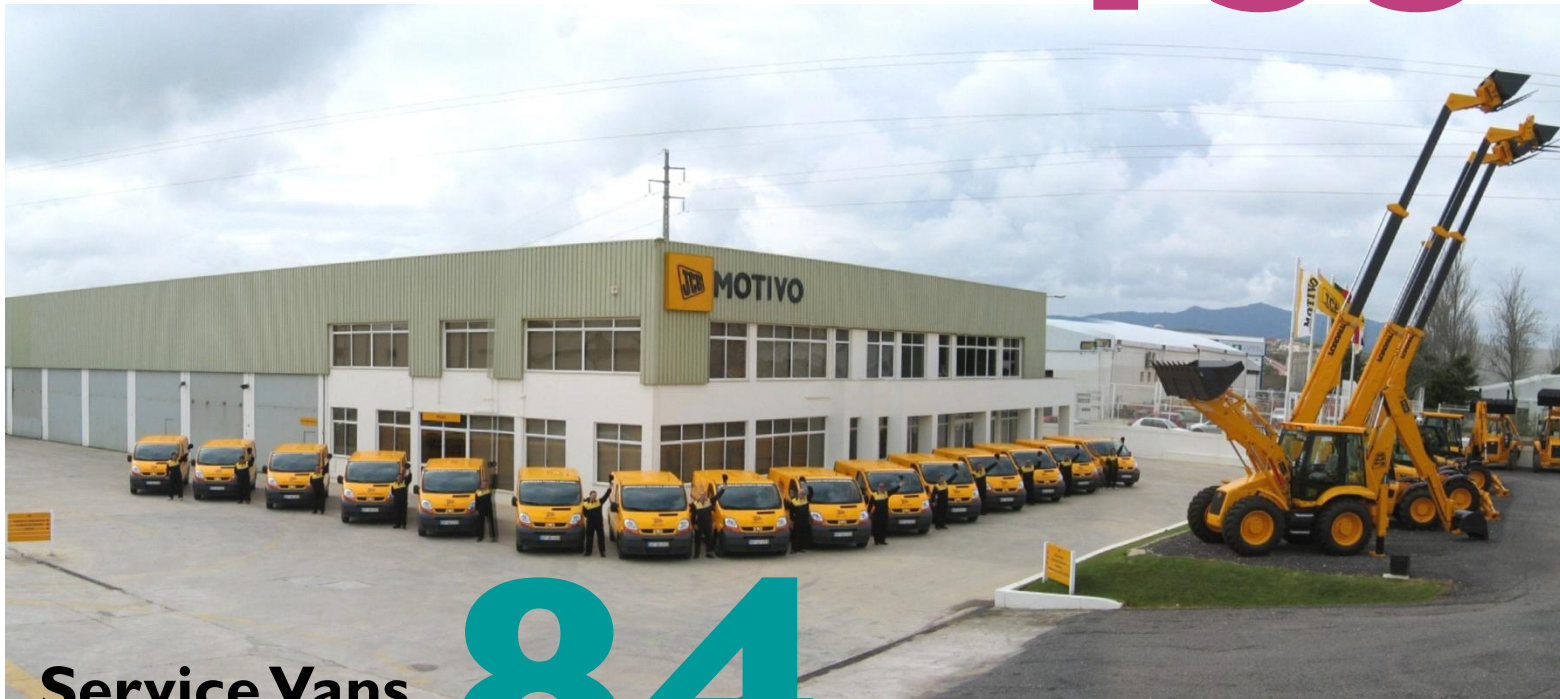
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Authorized Workshops & Mechanics

135



Service Vans

84



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E.C.E.D. HISTORY

- I.L.C. was born in the end of 1980's
- I.L.C. led to E.C.E.D.
- Today we are governed by European standards, where the majority of Manufacturers recognize the importance of Distribution.
- The realignment of the strength of Manufacturers, Rental Companies and Distributors working together can and will strengthen all.



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Western Europe: 10 Year Average Sales, 1998-2007

	1998-2007 (units)	2007 (units)	2007 vs 10 Year Average (%)
Austria	2.756	3.172	+15
Belgium	3.911	5.247	+34
Denmark	3.650	5.947	+63
Finland	1.849	2.537	+37
France	28.227	38.732	+37
Germany	27.615	37.711	+37
Ireland	3.308	5.200	+57
Italy	27.468	30.945	+13
Netherlands	4.534	6.652	+47
Norway	2.628	4.262	+62
Portugal	3.469	3.436	-1
Spain	14.462	21.047	+46
Sweden	2.519	3.586	+42
Switzerland	2.903	3.683	+27
United Kingdom	26.159	39.403	+51
Total Europe	155.458	211.560	+36

Source:
Off-Highway Research



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Central Europe & Russia: New reality

	2007 (units-estimated)
Russia	13.000
Poland	6.500
Bulgaria	1.500 / 2.500
Romania	1.500 / 2.500
Hungary	1.500 / 2.500
Czech Republic	1.500 / 2.500
Lithuania	1.500 / 2.500
Central Europe & Russia	27.000 / 32.000

Source:
Off-Highway Research

It is a market equal to 14% of Western Europe



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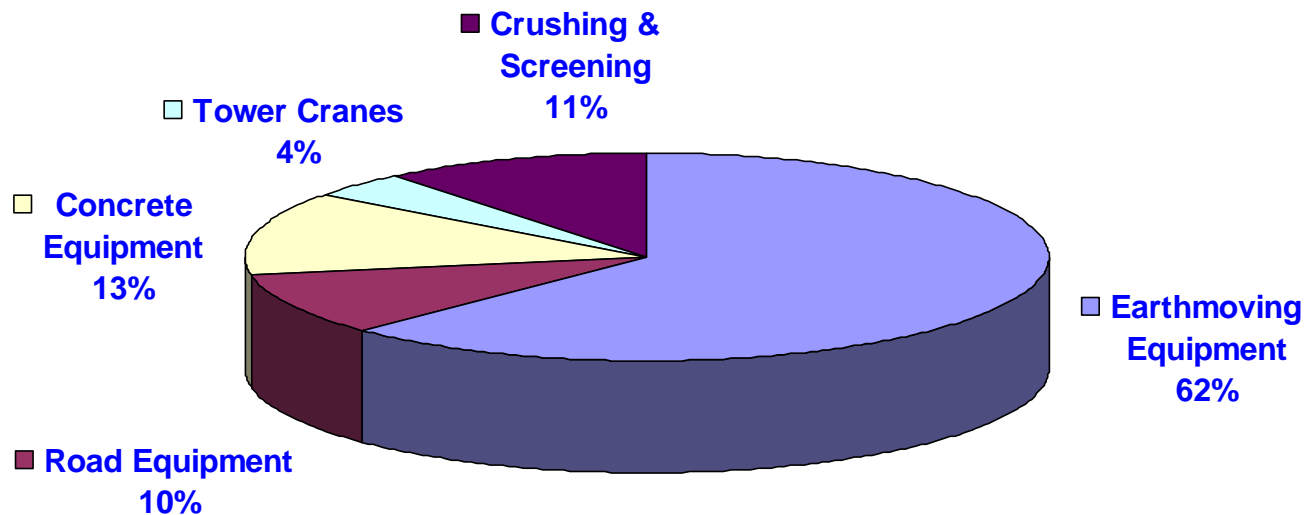
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Turnover Split by Product Category

2007: € 30 billion



Source: Citigroup Investment Research
Materials Handling Equipment not included



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OPPORTUNITIES

- More complex technology
- Logistic of machines & accessories
- Geo-localization - GPS
- ERP systems
- Used machinery business
- Made in China
- Association of Distributors



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THREATS

- EEC with 16 members
- EU with 27 members & some candidates



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EU Members

Austria	Latvia
Belgium	Lithuania
Bulgaria	Luxemburg
Cyprus	Malta
Czech Republic	Netherlands
Denmark	Poland
Estonia	Portugal
Finland	Romania
France	Slovakia
Germany	Slovenia
Greece	Spain
Hungary	Sweden
Ireland	United Kingdom
Italy	

Other European Countries

Albania
Armenia
Azerbaijan
Belarus
Bosnia and Herzegovina
Georgia
Iceland
Moldova
Montenegro
Norway
Russia
Serbia
Switzerland
Ukraine

Small European Countries

Andorra
Liechtenstein
Monaco
San Marino

Candidates for EU Members

Croatia
Macedonia
Turkey

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THREATS

- EEC with 16 members
- EU with 27 members & some candidates
- EU laws and regulations
- New and faster ways of distribution

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CONCERNS

- How, what and who will cover warranty costs
- Rental Companies need the best Distributors
- Customers demand more and better from Distributors
- Distribution is changing
 - New generation is emerging
 - Good softwares allow a modern and efficient management
 - New specialized companies (tyres, glazing, hydraulic hoses)



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WHAT NEW COULD E.C.E.D. OFFER

- Legislation and regulations related to machinery, trade, warranties, education and certification, standards, safety repair conditions on site, etc.
- Manufacturers vs. warranty applications
- Assistance to Distributors of new EU member states
- Machine repair costs: balance and harmonization
- Machinery trade statistics
- Theft and identification of stolen machines

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THE VISION

- A strong Association
- Willingness to work closely with Manufacturers and ERA
- ERA and Distributors have the same clients but we are not in competition and a joint approach will benefit both parties

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THANK YOU!



www.eced-association.org



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