

## ERA and the RENTAL MARKET in EUROPE



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## RENTAL MARKET

### Size of rental market (bn €)

■ Europe	24
■ USA	27.1
■ Japan	5.4

## RENTAL MARKET – Europe

“The European Equipment Rental Industry 2008 Report”

**Penetration of Rental in Main European Markets in 2007**

	Equipment Sales Penetration in %	Equipment Population Penetration in %	Construction Industry Penetration in %	Country Population Penetration in € per person
UK	62,3	19,7	4,0	140
SPAIN	31,7	13,6	2,1	102
France	18,2	11,1	2,0	67
GERMANY	10,0	5,7	1,3	39
ITALY	11,3	4,2	1,1	38
NETHERLANDS	n.a.	n.a.	3,1	142
SWEDEN	36,6	21,4	7,0	186
<b>AVERAGE</b>	<b>24,4</b>	<b>10,4</b>	<b>2,3</b>	<b>82</b>

## RENTAL INDUSTRY - Europe

### Main data for 2007

- Revenues: € 24 bn
  - Top 10: 18.7% i.e. € 3.9 bn
  - Top 50: 40% i.e. € 8.8 bn
- Rental companies: 36 400 including 15 000 companies without operators
- Workforce: 177 500 in rental
  - 117 000 in rental companies without operators
  - 59 800 in rental companies with operators

## RENTAL INDUSTRY – Europe

Main Rental Markets in Europe in 2008		
in Million €	Total Turnover	Rental Companies without Operators
UK	9 500	6 300
SPAIN	4 360	2 550
France	4 020	3 270
GERMANY	3 600	2 940
ITALY	2 350	1 100
NETHERLANDS	2 720	830
SWEDEN	1 770	1 090

## ERA STRUCTURE

ERA currently represents 4600 members, through:

- 13 national rental associations
- 45 rental companies
  - operating in 27 countries
  - with activities in most market segments
- 45 associate members
  - OEM's
  - service companies

## ERA'S MISSIONS

- Promoting the Rental industry
- Supplying the industry with liable statistics
- Working on the creation of a European market
- Lobbying in Brussels: a voice for rental

## ERA - COMMITTEES

### ERA active through its working groups

- Promotion,
- EU Affairs,
- Sustainability,
- Equipment Theft,
- General Rental Conditions,
- Statistics.

## ERA Convention

ERA's convention: a network forum

- Roundtables
- Lectures
- Rental Awards

➔ **Manchester – UK : 26 – 27 May 2009**

## 2009 CHALLENGES

- ERA: A partner in the Construction Trade
- Rental companies have to face the current crisis
- Are Rental Operators a new market for Dealers?
  - New equipment sale
  - Fleet maintenance
  - Equipment resale

## *ERA – RENTAL MARKET in EUROPE*

Thank You



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