

EUROPE'S RENTAL MARKET & MEWP FLEET TRENDS

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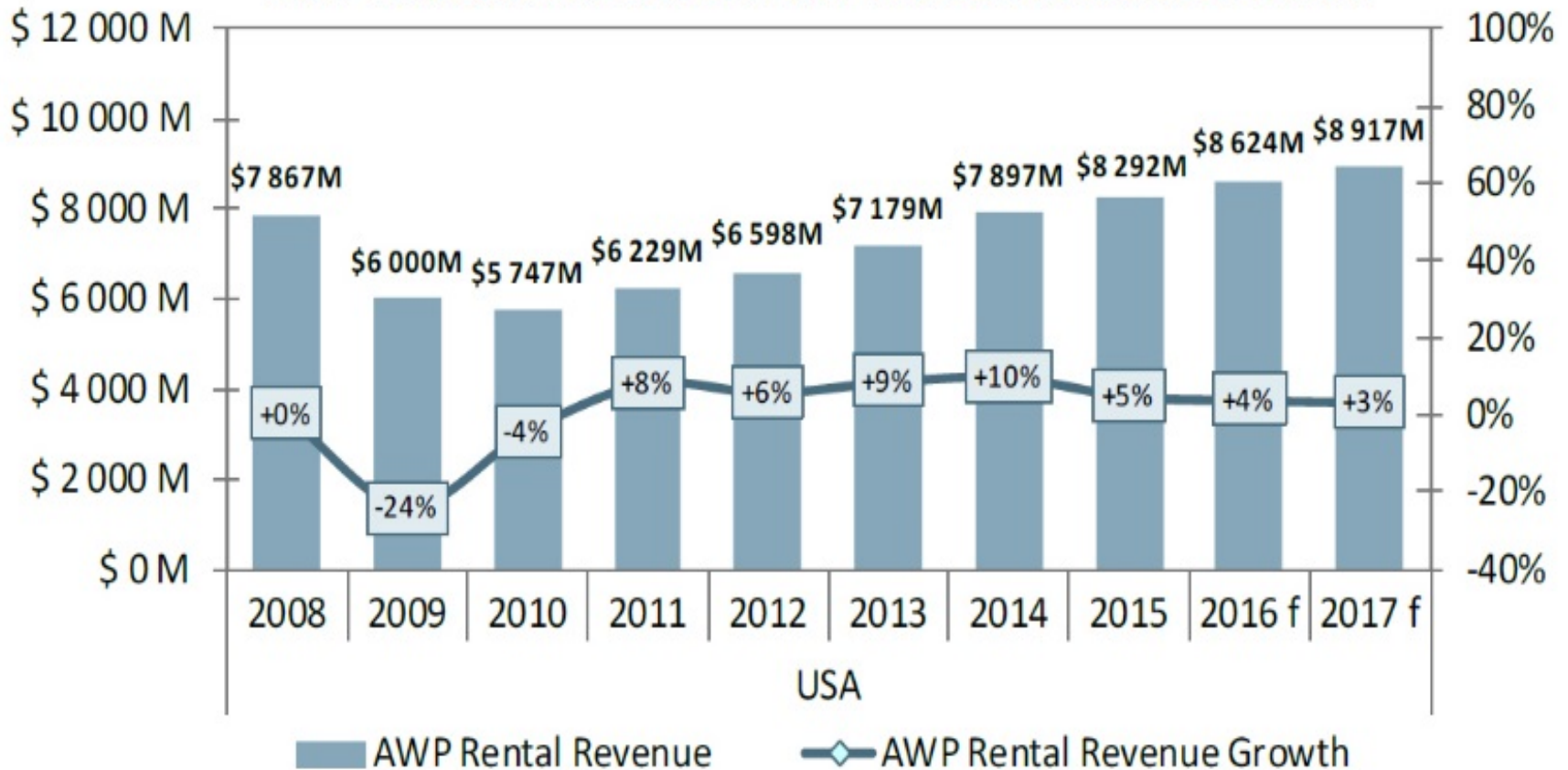


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- **Rental metrics from large access companies**



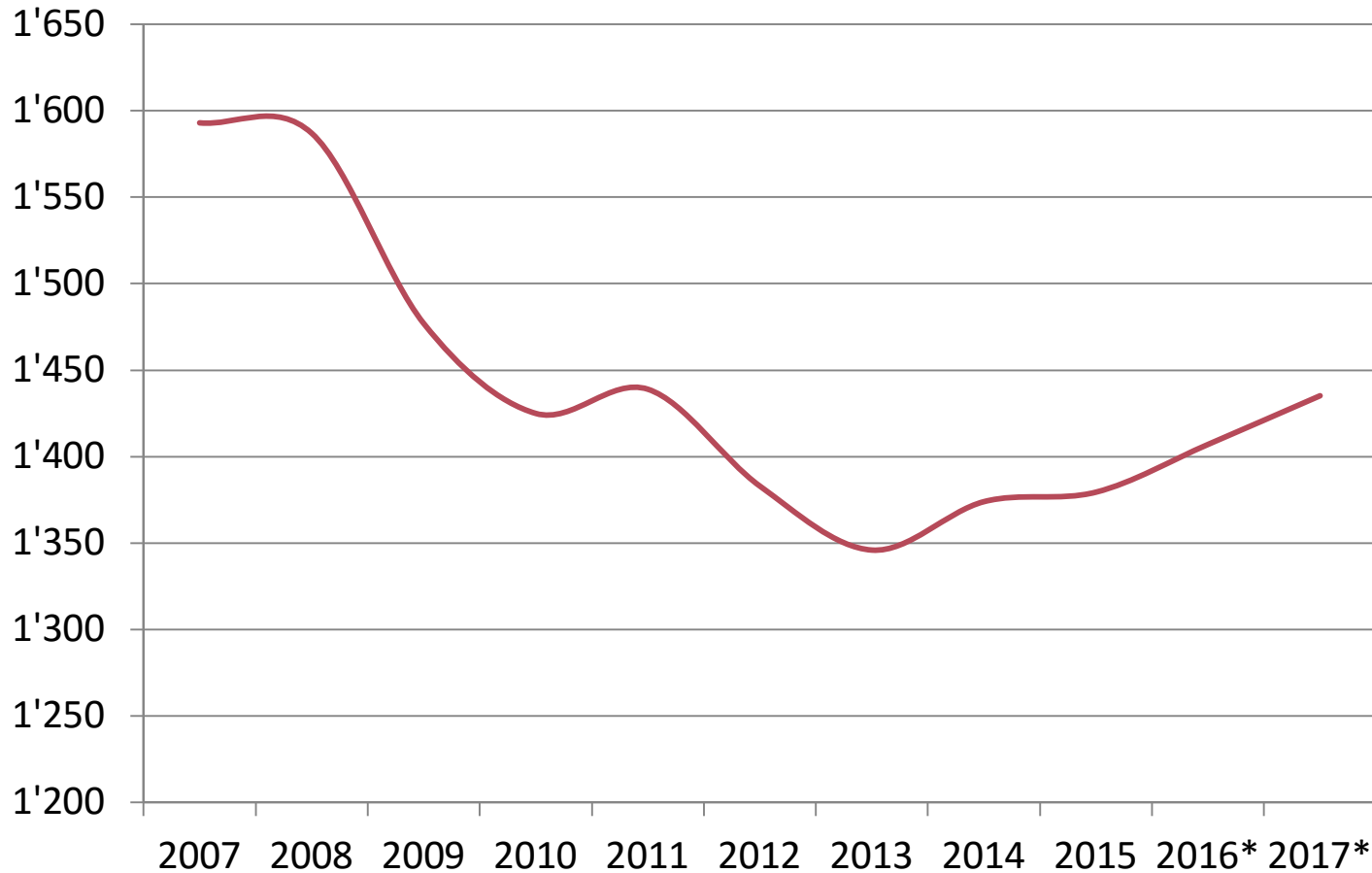
AWP Rental Revenue & AWP Rental Revenue Growth



SOURCE: [Www.IPAF.Org/Reports](http://www.IPAF.Org/Reports)



European construction output (€ billion)

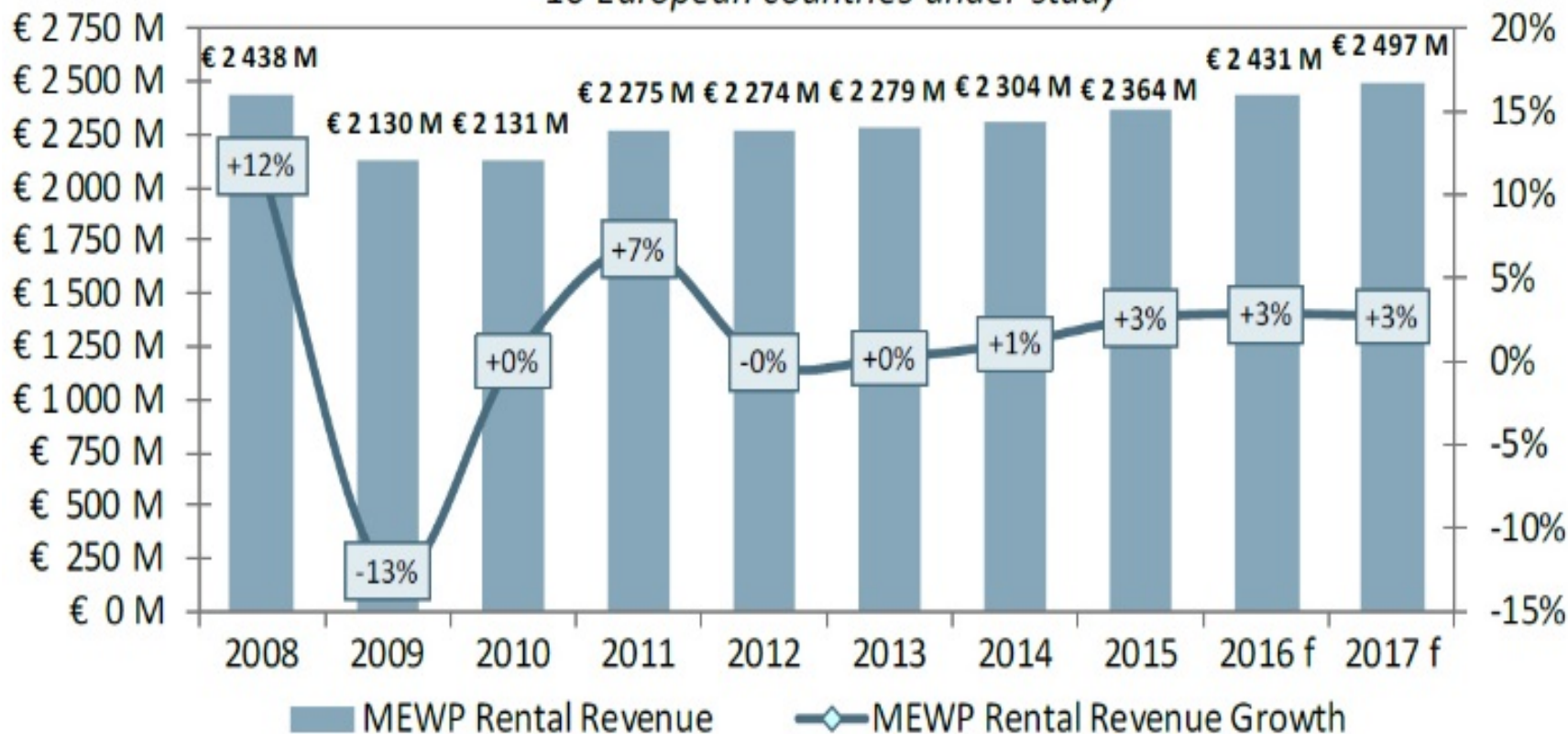


SOURCE: FIEC



MEWP Rental Revenue & MEWP Rental Revenue Growth

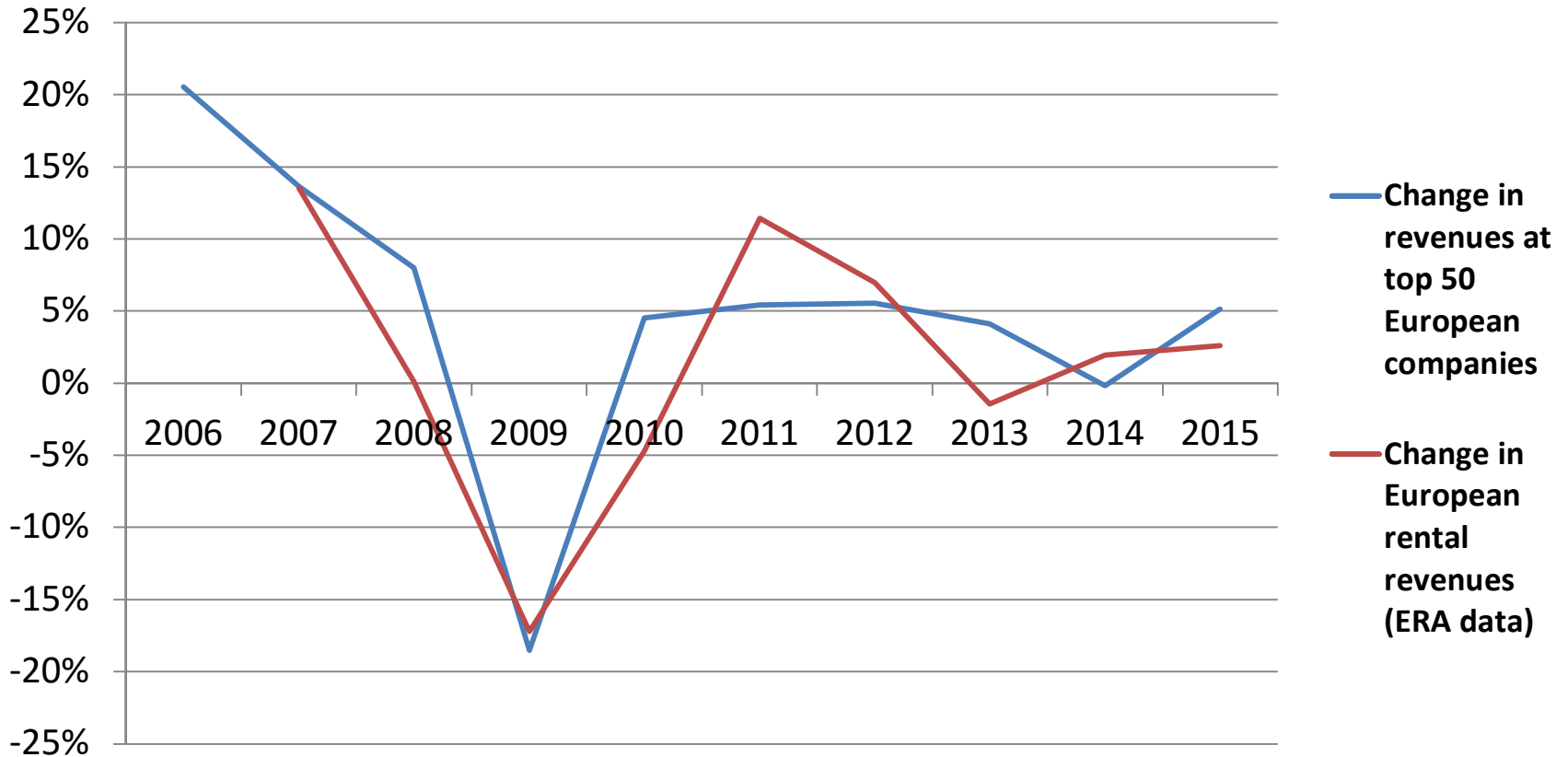
10 European countries under study



SOURCE: [Www.IPAF.Org/Reports](http://www.IPAF.Org/Reports)



Year-on-year changes in European rental revenues



SOURCE: ERA, IRN100 survey



Rental revenue growth per country 2016

	ERA 2015 Report (Sept 2015)	Update (May 2016)	Difference in % points
Countries	2016	2016	2016
Austria (AU)	2,9%	3,9%	0,98
Belgium (BE)	2,3%	2,8%	0,42
Denmark (DK)	2,6%	1,2%	-1,38
Finland (FI)	3,6%	3,2%	-0,49
France (FR)	2,4%	3,0%	0,66
Germany (DE)	1,8%	3,5%	1,72
Italy (IT)	3,4%	3,0%	-0,43
Netherlands (NL)	1,8%	1,0%	-0,79
Norway (NO)	2,3%	1,3%	-1,01
Poland (PL)	1,8%	1,9%	0,15
Spain (ES)	3,1%	2,0%	-1,15
Sweden (SE)	0,9%	1,0%	0,05
Switzerland (CH)	0,3%	1,0%	0,73
United Kingdom (UK)	3,7%	2,3%	-1,35
EU 28 & EFTA	1,3%	1,0%	-0,23

SOURCE: European Rental Association (ERA)



The UK: post-Brexit vote

- UK economy was solid before the referendum
- Consensus that uncertain climate will impact investment and slow the economy
- Late October will see GDP figures for the UK's third quarter, and will give a better guide
- Big UK rental companies not reporting any immediate impact on trading
- Rental investment continues

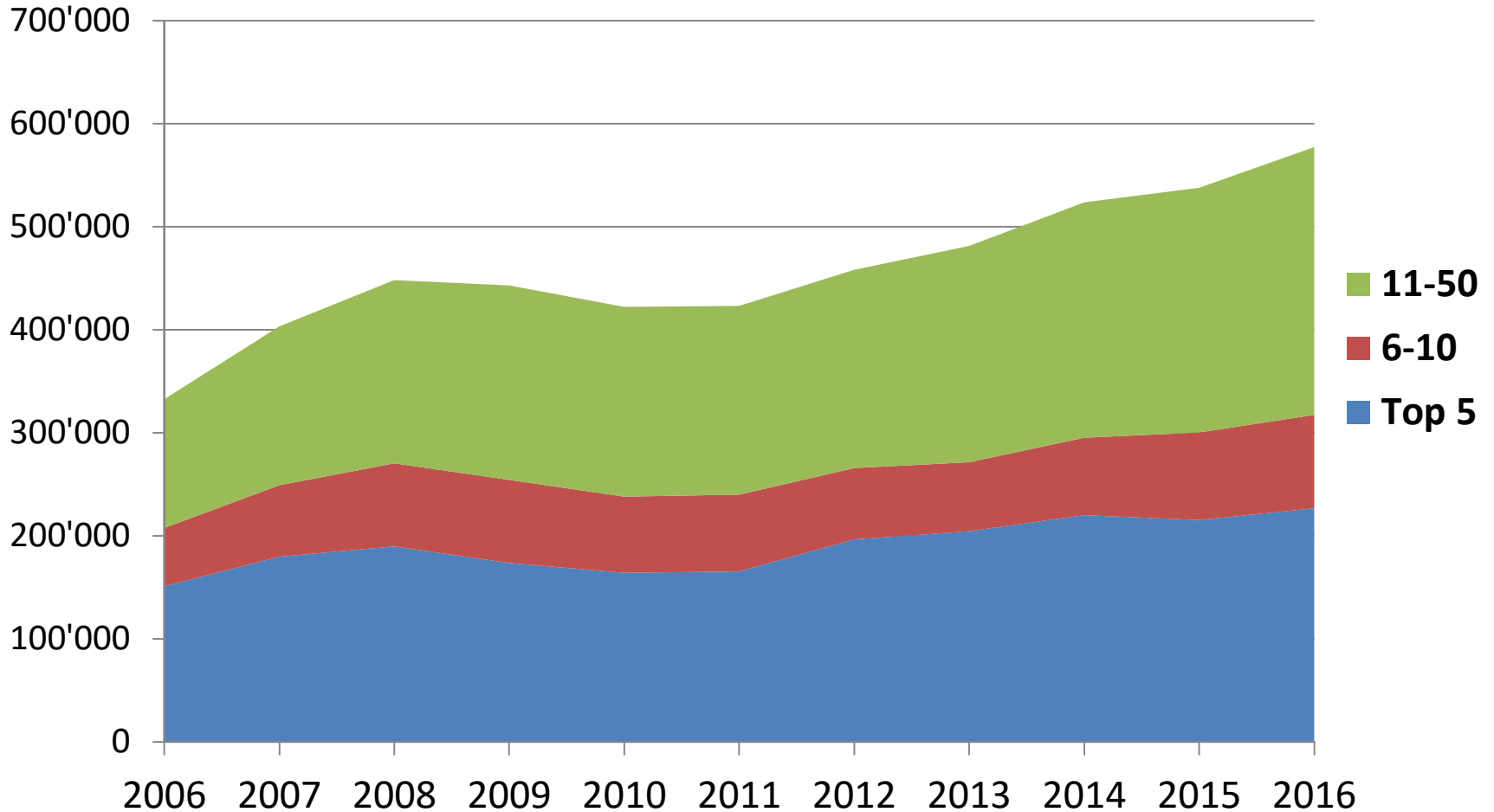


Benchmarking

- *Access International* and *International Rental News* toplists: Access50 and IRN100.
- Benchmark reports to be published before the end of the year.
- Here are some of the findings:



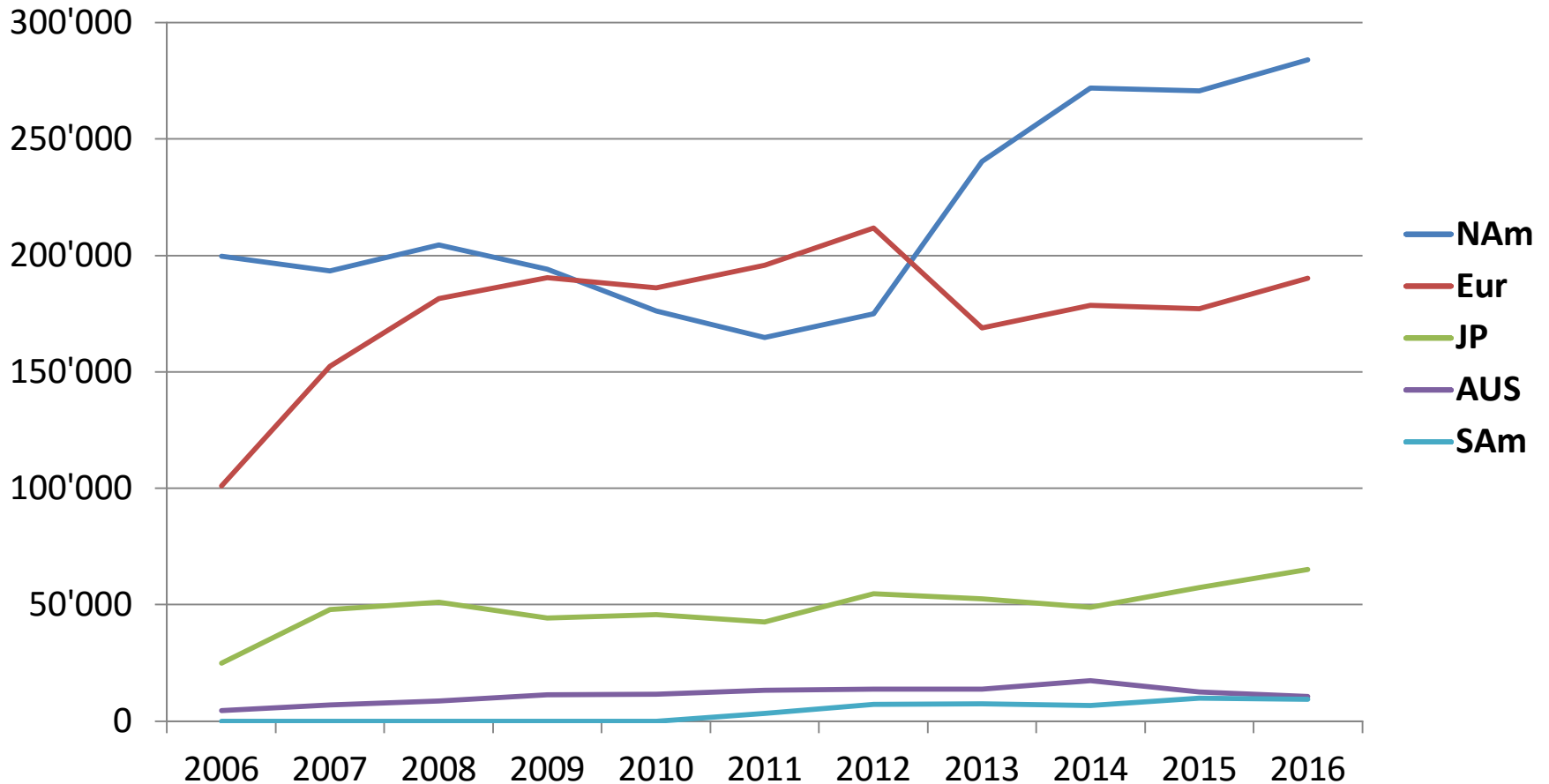
Access50: total AWP fleet



SOURCE: Access International



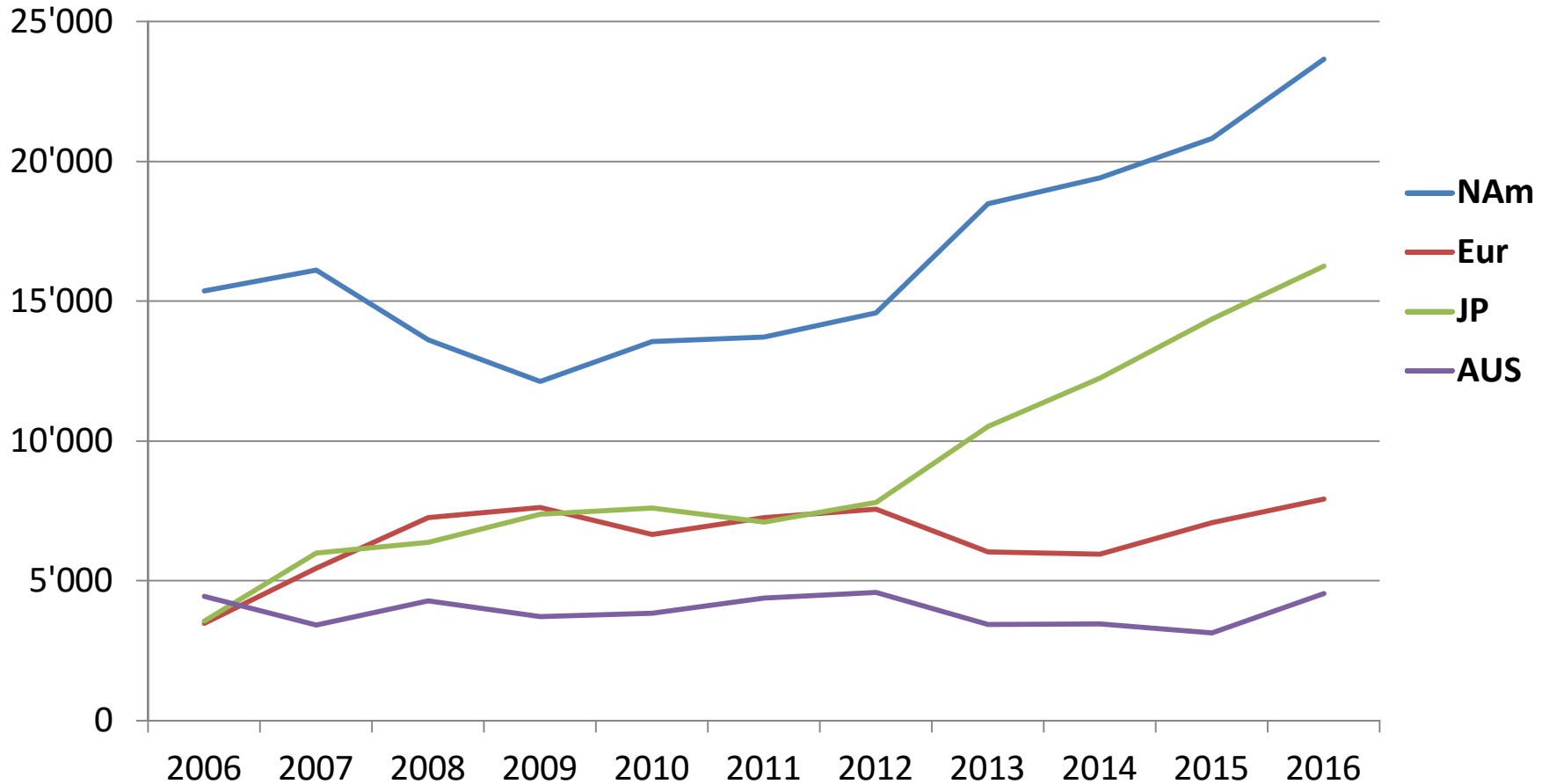
Access50: regional fleet sizes



SOURCE: Access International



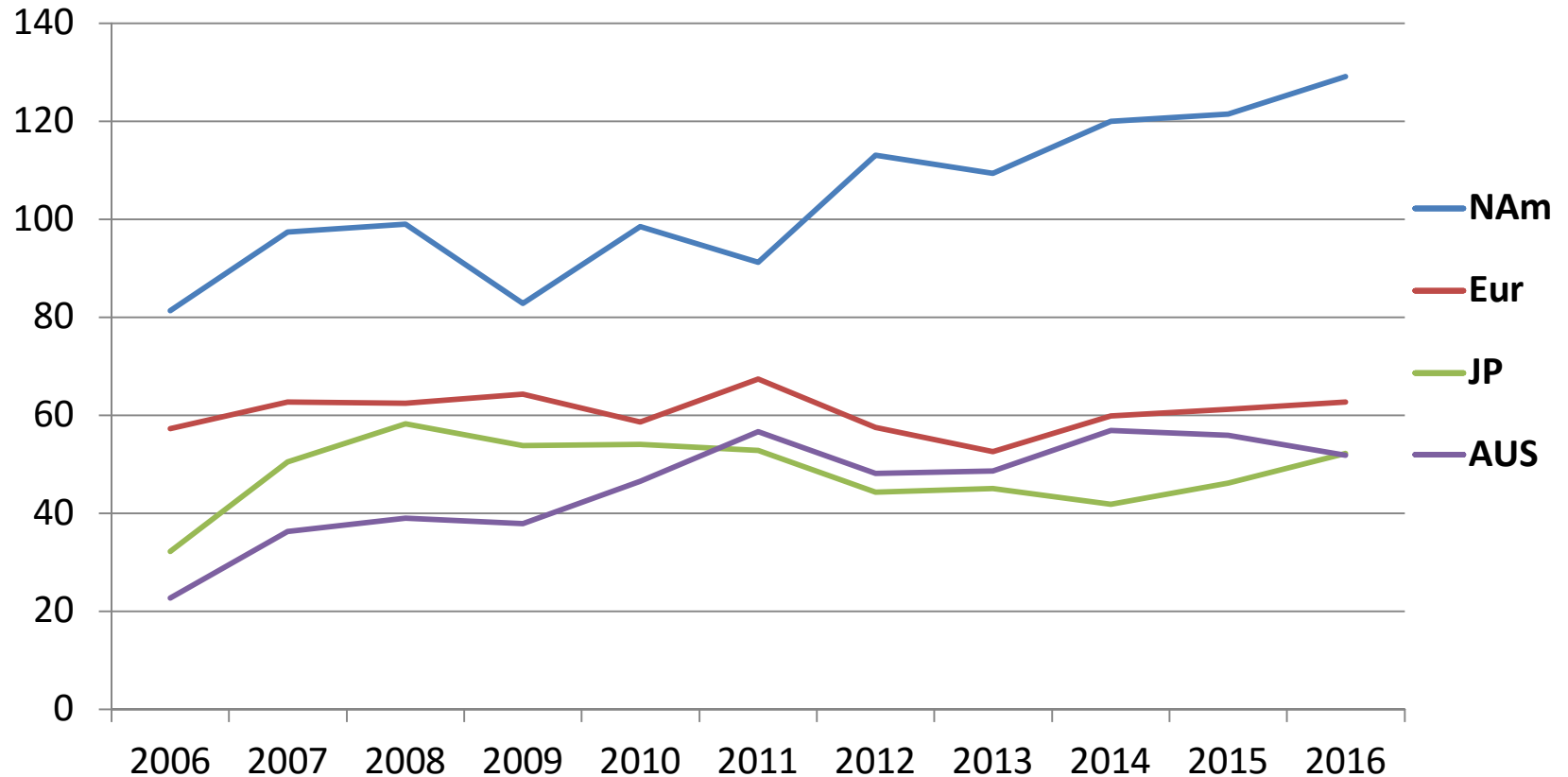
Access50: average fleet size by region



SOURCE: Access International



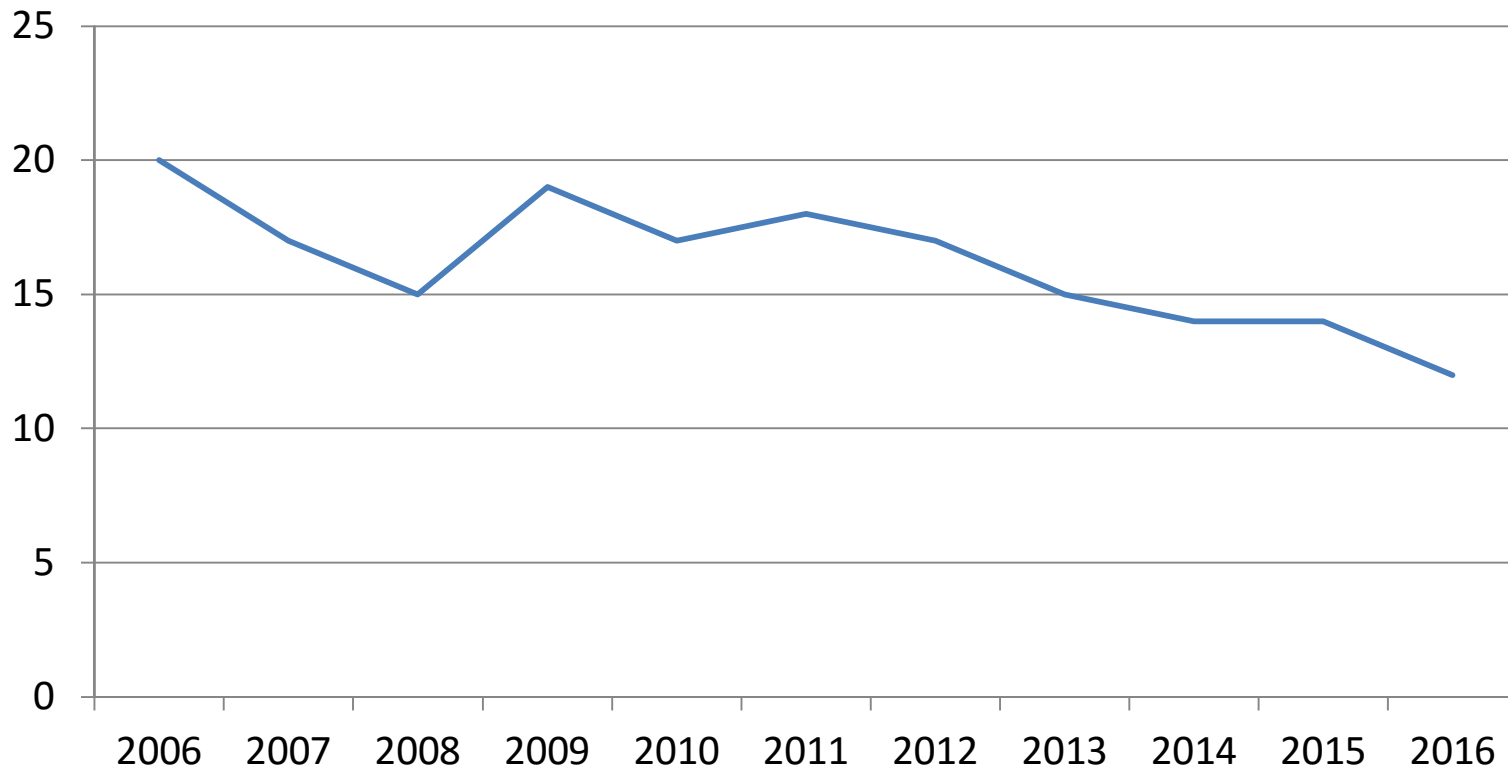
Access50: average number of AWP's per depot



SOURCE: Access International



Number of access specialists in Access50



SOURCE: Access International



Thank you

Any questions, contact:

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