

RENTAL BY NUMBERS

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Roma, 15 settembre 2022

Rental Blog

RENTAL
CONSULTING

Rental Academy



è il primo
specialista del
noleggio
professionale
in Italia.

Indag
in col
Asso
Il No
mer
attr

COF
Specialisti del noleggio

gio di macchine ed
costruzioni in Italia.

Noleggio

Numero 23 - Dicembre 2014
Top 100 Le prime cento società del settore del noleggio



1981-2001

Marketing, Training, Outsourcing in a big national Bank



2001-2007

Founder and Editor of **Noleggio**, first Italian magazine about the rental market



2007- current

CEO & Founder of Rental **Consulting**
Rental **Blog** - Rental **Academy**



«TORTURE NUMBERS
AND THEY WILL
CONFESS TO
ANYTHING»

GREGG EASTERBROOK



«WORDS MATTER»

NANNI MORETTI





How to collect and spread rental numbers



How to analyse and share numbers within companies



How numbers affect the future profitability of rental companies

New entrants, higher revenues, increased spending: this year's IRN100 list showcases a dynamic and expanding equipment rental industry. Murray Pollok and Belinda Smart report.

Rebound

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, Belinda Smart, +44 (0)1952 786209 | belinda.smart@ikh.com

Rankings are based on rental revenues for 2021 (or the most recent financial year) and include sales of used fleet and consumables/contractor supplies. Sales of new equipment have been excluded where these constitute a significant and separate part of a company's business, and where we have this information.

Figures denoted ^{EUR} have been estimated by IRN. All revenues have been converted into £ using exchange rates as at 31/12/21, as follows: (exchange rates used in last year's survey are given in brackets):

£1.00 = US\$1.34 (1.23)
= JPY110.10 (108.00)
= SEK10.26 (10.00)
= NOK10.02 (10.00)
= BRL6.33 (6.30)
= CNY7.22 (6.00)
= UAE AED4.18 (4.50)
= SGD5.53 (5.40)

The overwhelmingly positive trend for the world's equipment rental market in 2021 – buoyed by recovery from the pandemic and an unleashing of pent-up demand – is fully reflected in this year's IRN100 survey, with total revenues up 13% to €56.5 billion.

That 13% is corrected against changes in currency exchange rates between 2020 and 2021 (see table 1). The modest strengthening of the Euro against the US dollar

and Pound Sterling meant that, before the correction, the increase was actually closer to 18.3%.

If recovery from the pandemic meant that many rental companies were reporting revenues close to or exceeding pre-Covid levels, it also meant that the 2021 comparison against 2020 figures reflected the extent to which different countries were hit by the pandemic.

The severe economic downturn in countries like the UK, France, Spain and Italy – as well as, to some extent, the

| RANK '22 '21 | COMPANY | (EUROS) 2021 2020 | HEAD OFFICE | AREAS OF OPERATION | TYPE OF RENTAL COMPANY | NUMBER OF DEPOTS STAFF | CONTACT DETAILS |
|--------------|---------------------|-------------------|---------------------------|---|--|------------------------|--|
| 1 1 | UNITED RENTALS | €144 6985 | Stamford, Connecticut, US | US, Ca, Europe, Australia, NZ | Construction equipment, tools | 1360 20830 | +1 801 (201) 622-1311 www.ustr.com |
| 2 2 | ASSTEAD GROUP | €284 5178 | London, UK | US, Ca, UK, Ger, Ier | Construction equipment, tools | 1188 20275 | +44 (0)20 7726 5700 www.asstead-group.com |
| 3 3 | AKTIO HOLDINGS CORP | €249 2217 | Tokyo, Japan | Jap, Thai, Sing, Mal, Tai, Ind, Aus, Myan | Construction equipment, tool hire, party/leisure | 1010 9382 | +81 3 6854 1413 www.aktio.co.jp/en/ |
| 4 4 | LOXAM | €229 1989 | Paris, France | Europe, Middle East, Brazil, Cal | Construction equipment, tools | 1040 11170 | +33 1 58 440 400 www.loxam.com |
| 5 5 | AGGREGO | €190 1517 | Glasgow, UK | +80 countries | Power, temperature control and compressor rental | 182 6080 | +44 (0)141 225 5900 www.aggrego.com |

www.internationalrentalnews.com

MARKET NUMBERS

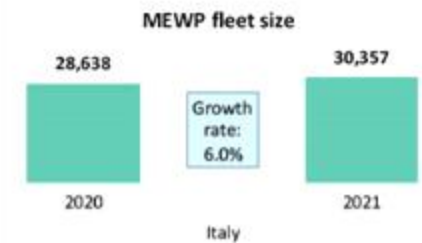
Italy – key findings

The Italian MEWP rental market performed well in 2021 and was able to recover most of its pandemic losses. The growth was driven by recovery of utilisation to 2019 levels and 6% growth in fleet size.



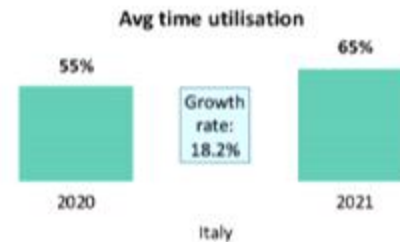
Source: Ducker for IPAF

CAGR: Compound annual growth rate



Source: Ducker for IPAF

- revenue increased by 12% in 2021, boosted by government infrastructure investments, “110% Superbonus” construction renovation programme and resumption of commercial activities.
- Fleet size grew 6% year on year, supported by a state funded “4.0 Industria” technology investment programme.



Source: Ducker for IPAF



Source: Ducker for IPAF



What do we consider as turnover?



Whay kind of services?



What kind of sales?



PERFORMANCE INDICATORS TO KNOW (AND SHARE)



Time Utilisation



Money Utilisation



Return On Investment



Customer Lifetime Value



Lead Conversion Rate



Total Cost Of Ownership



Fleet Unavailable For Rent



**Customer Satisfaction
Rate**



Employee Satisfaction Rate



Analytical accounting



Telematic collection



Turn numbers into information



DEVELOPING REVENUES IN THE FUTURE





Unique Value Proposition



Business Model Canvas



Business Agility



Customer in the team



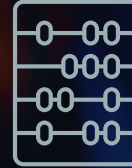
**Sharing numbers with
partners**



**Purpose and Education
projects**



Flexibility and digitalisation



Selling with TCO



Contingency Plan



Yield Management



Green policies



Redistribution of value



THANK YOU

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