

INTERNATIONAL **rental** CONFERENCE

ASIA

Pierre Boels – Boels Rental

THE COMPANY | WHERE IT ALL STARTED

FOUNDED IN 1977, FAMILY-OWNED GENERALIST EQUIPMENT RENTAL COMPANY IN EUROPE

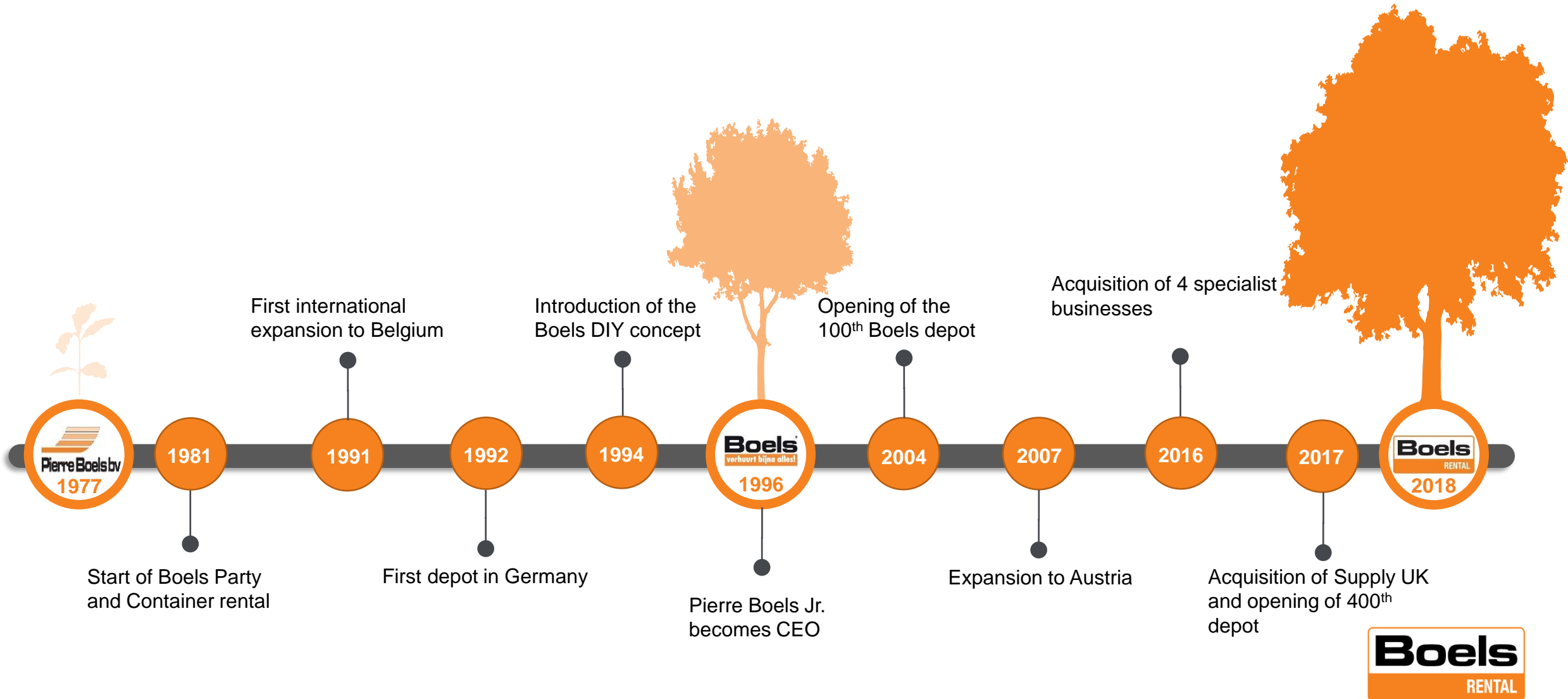


Amstenrade (NL), 19



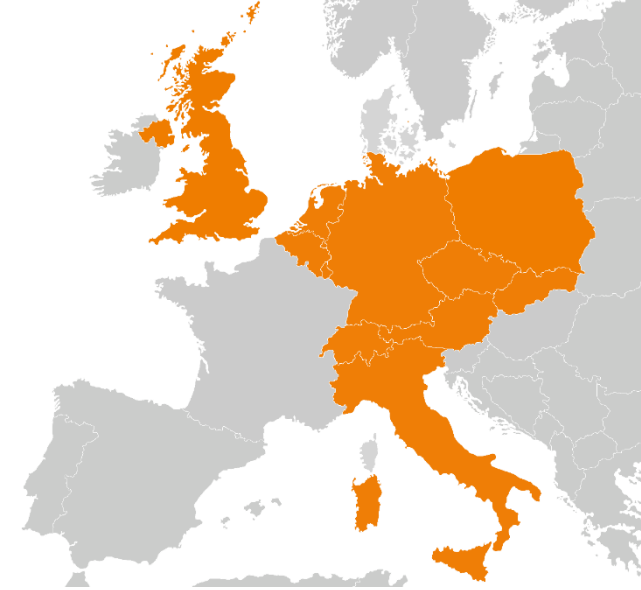
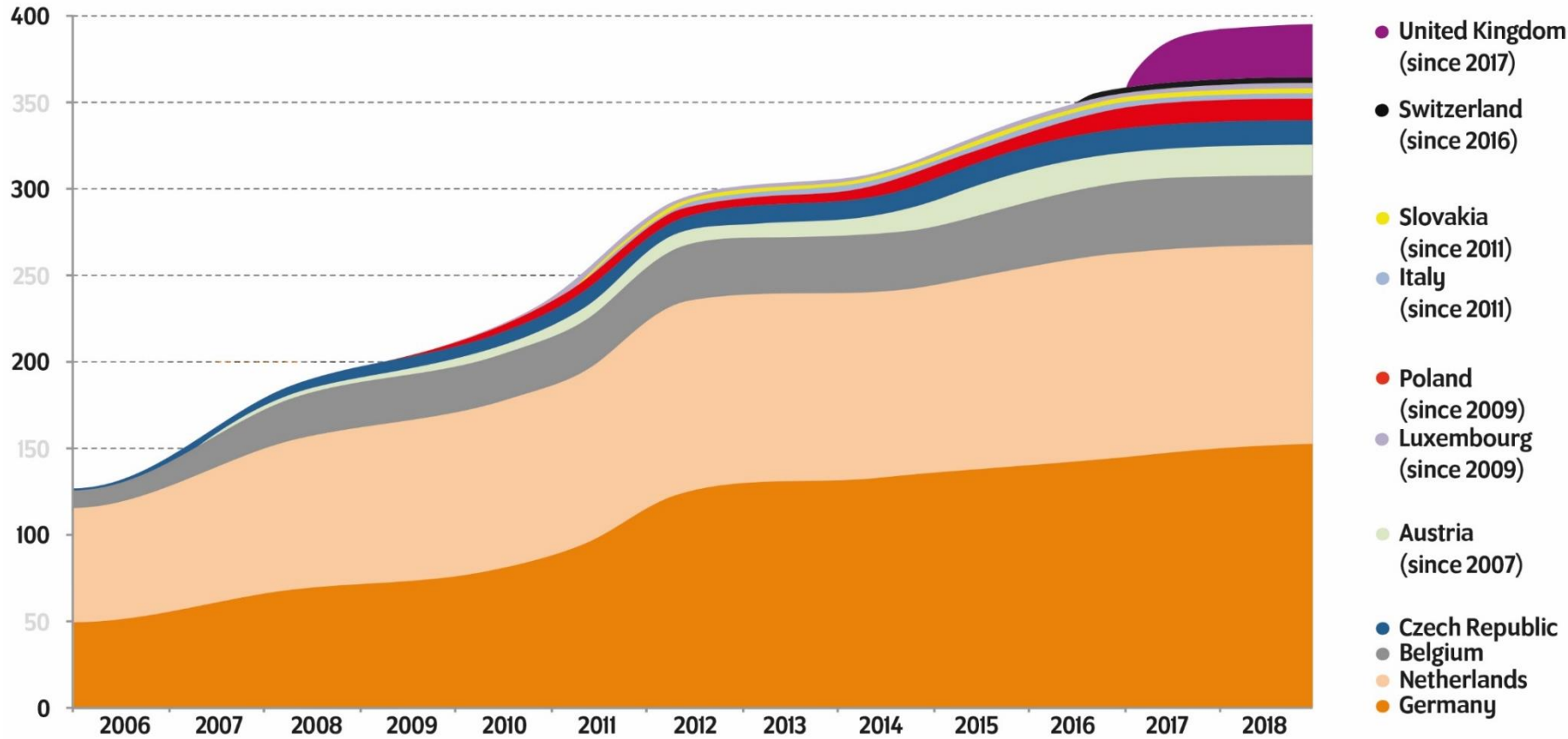
THE COMPANY | OVER 40 YEARS OF EXPERIENCE

A PASSION FOR SOLUTIONS, PROVIDING TAILOR-MADE ANSWERS FOR EVERY RENTAL NEED



THE COMPANY | RENTAL IS LOCAL BUSINESS

OVER 400 COMPANY-OWNED BRANCHES



GOING ABROAD | OPPORTUNITIES & CHALLENGES



OPPORTUNITIES

- New markets
- Diversification
- Competitive advantage
- Foreign investment opportunities
- Access to talent

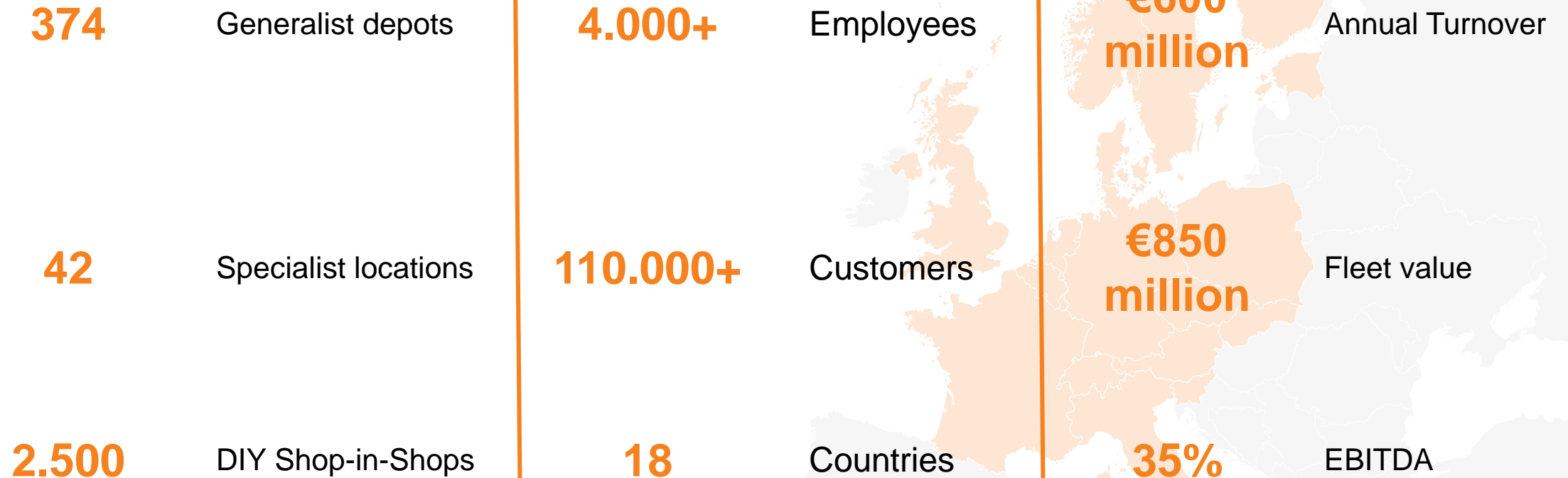


CHALLENGES

- Communications
- Physical Distance
- Unfamiliar cultures
- Foreign legislation and regulations
- Currency rates
- Political Risks
- Marketing
- HR

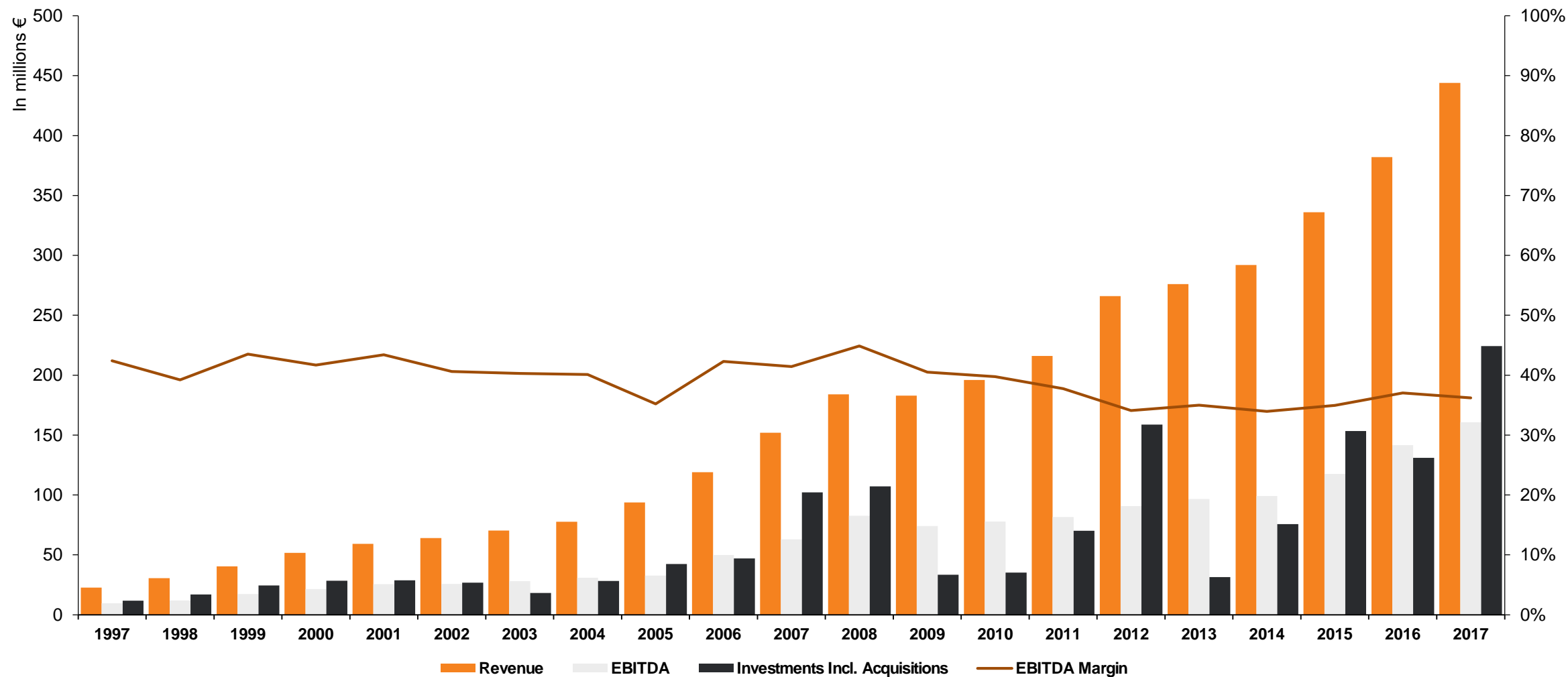
THE COMPANY | FACTS & FIGURES

EUROPE'S NO. 5 RENTAL BUSINESS



THE COMPANY | A CONTINUOUS FOCUS ON GROWTH

EUROPE'S NO. 5 RENTAL BUSINESS



FROM GENERALIST TO SPECIALIST | ACQUISITIONS

ACCELERATION IN SPECIALIST ACQUISITIONS

		General Rental	Specialist Rental	Market
2012	Baurent	✓		Germany
	Loca-System	✓		Belgium
2015	Racor		✓	Benelux
	Yellow Rental		✓	Netherlands
	M.R. Drott	✓		Austria
	Port-o-Let		✓	Netherlands
	Kuhn	✓		Switzerland
2016	IQ-Pass		✓	Netherlands, Belgium, Germany
2017	Supply UK	✓		United Kingdom
	Abird		✓	Netherlands, Belgium, Germany
	Already Hire	✓		United Kingdom
2018	Van Deuveren Traffic		✓	Netherlands
	Delta Rent		✓	Netherlands
	Amdyte		✓	Netherlands

FROM GENERALIST TO SPECIALIST | SPECIALISATIONS

SPECIALISTS DELIVERING EXPERT SOLUTIONS

Specialisations

Access Control

Aerial Platforms

Air

Climate Control

Concrete Care

Construction Equipment

Construction Hoists

Construction Site Installation

Fencing

Geo & Safety

Lifting & Materials Handling

Power

Prof Guard

Rail Equipment

Traffic Service

Site Accommodation

Portable Kitchens

Welding & Engineering

FROM GENERALIST TO SPECIALIST | BUSINESS MODEL

EXTENSIVE RANGE OF PRODUCTS IN EQUIPMENT RENTAL...

Extensive product range

- Generalist rental
- Business units in 18 specialisations



Highly diversified customer base

- Over 108,000 active debtors, plus cash customers
- Low dependency on construction industry compared to peers (<35%)

Rental offerings leading in

- Availability
- Safety
- Support
- Added Value

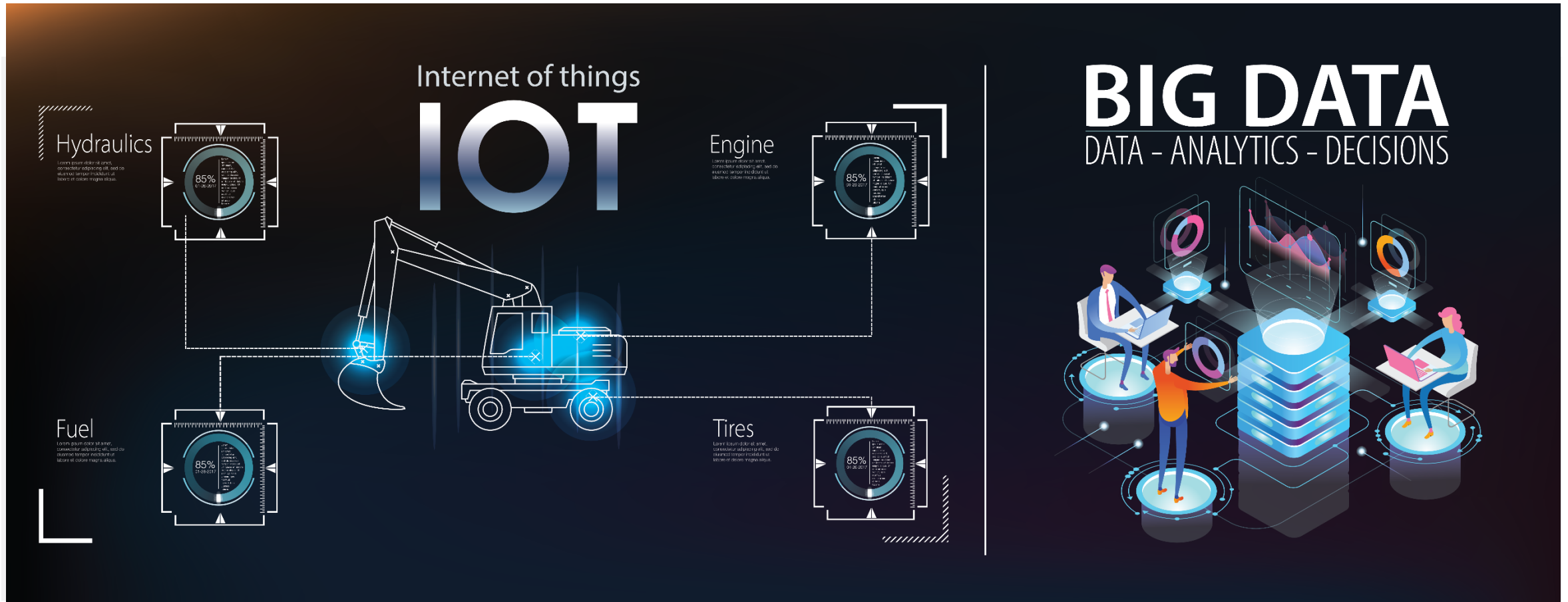


Scalability of depot network to reach national coverage

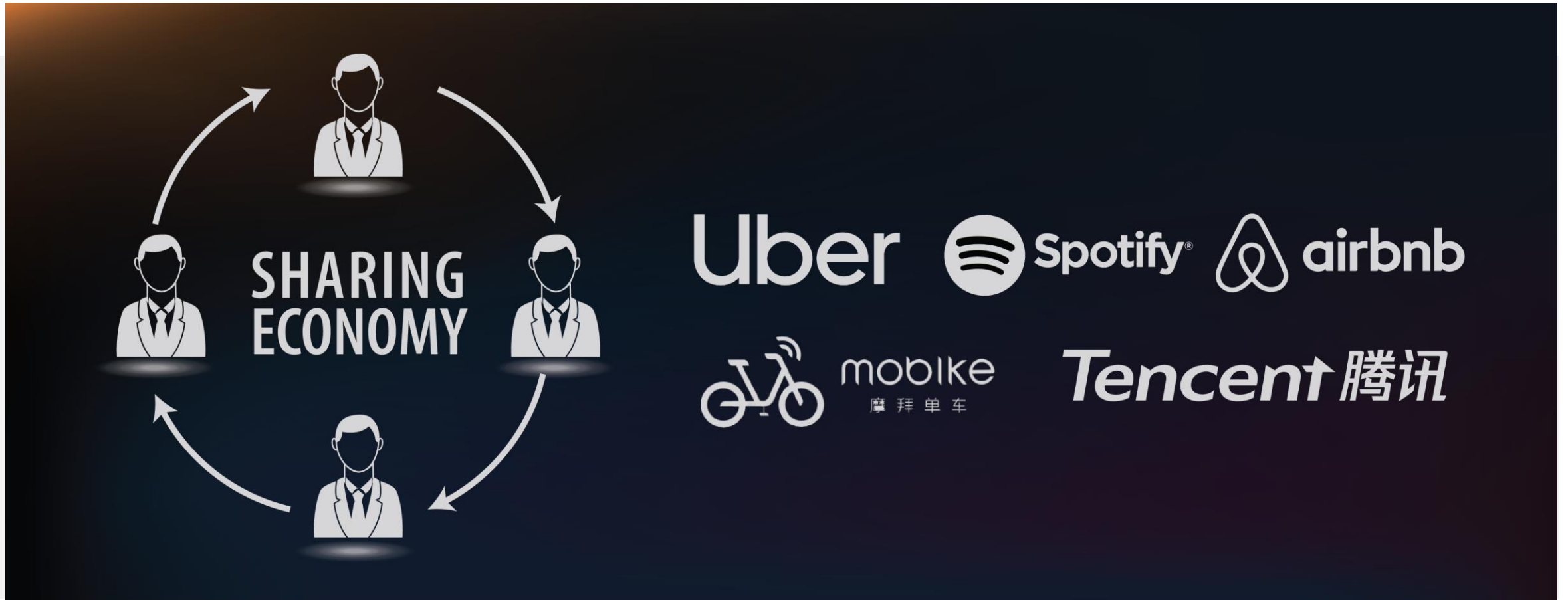
- Benelux
- DACH-Area
- Mid-Europe
- UK



THE FUTURE | INTERNET OF THINGS & BIG DATA



THE FUTURE | SHARING ECONOMY



ERA| EUROPEAN RENTAL ASSOCIATION

THE VOICE OF THE EQUIPMENT RENTAL INDUSTRY

The key mission of the ERA

To promote the rental concept in order to facilitate a continued growth of the rental industry by creating an open European market, at a much larger scale than any national market.



EUROPEAN
RENTAL
ASSOCIATION

Focus on 7 main areas:

- Promotion of the rental concept
- Technical issues and equipment
- Statistics on the European rental market
- Sustainability
- Harmonisation of national regulations
- Awareness of the challenges of the Future
- Support to the rental associations