



MEWPS – A STRATEGIC INSIGHT

Peter Schrader, COO Zeppelin Rental GmbH

ZEPPELIN CAT Rental

2019 4 MARCH
IPAF
summit

ZEPPELIN
WE CREATE SOLUTIONS



Peter Schrader

Managing Director/COO
Zeppelin Rental GmbH, Munich/Germany

- | | |
|--------------|---|
| 2004 – today | Managing Director/COO Zeppelin Rental (former MVS Zeppelin) |
| 2003 | Head of Division Rental Services, General Manager Zeppelin Construction Equipment and Zeppelin Rental (former MVS Zeppelin) |
| 2001 – 2002 | Director and General Manager Eastern Europe/ Central Asia for Zeppelin GmbH |
| 1990 – 2001 | Different sales responsibilities at Zeppelin Metallwerke and Zeppelin Construction Equipment |
| 1987 – 1990 | Research assistant at Technische Universität Bergakademie Freiberg |
| 1982 – 1987 | Academic Studies at Technische Universität Bergakademie Freiberg, degree in Mining Engineering |

GROUP OVERVIEW



Managementholding: Zeppelin GmbH
Shareholders: Zeppelin-Stiftung / Luftschiffbau Zeppelin GmbH
Turnover 2018: 2.9 bill. €
Employees: over 8,000
Locations: 190 Locations
in 35 Countries



Construction Equipment EU

Sales and service of construction machines



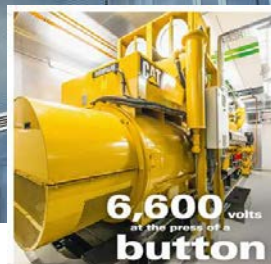
Construction Equipment CIS

Sales and service of construction and agricultural machines



Rental

Rental and project solutions for construction and industry



Power Systems

Propulsion & energy systems



Plant engineering

Process solutions for raw material handling



Z Lab

New digital business models

FACTS & FIGURES

ZEPELIN RENTAL IS THE LARGEST CAT RENTAL STORE WORLDWIDE

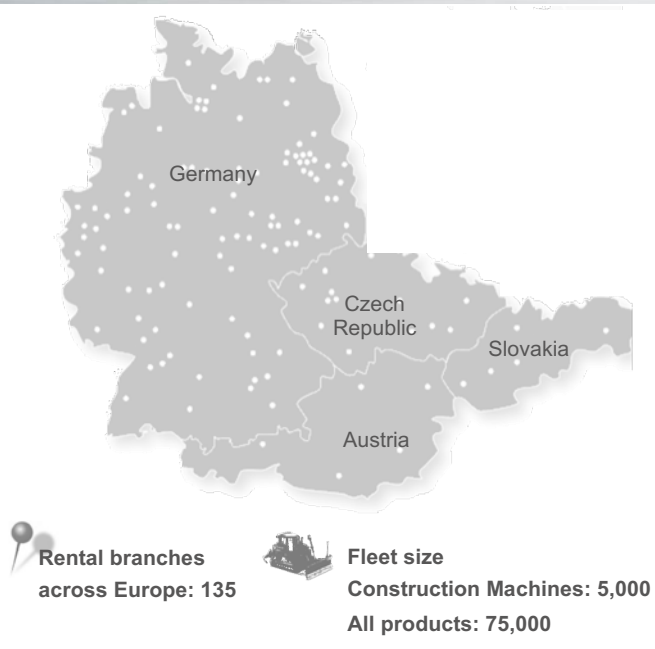


KEY FACTS 2018



Total Revenues	€ 473m
Rental + Service Revenues	€ 400m
Product Segments	9
Countries	4
Employees	1,558

BRANCH NETWORK

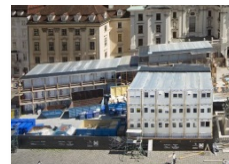


OFFERING

Equipment Rental



Temporary Infrastructure



Construction Logistics & Services



BUSINESS MODEL

INTEGRATED BUSINESS MODEL BASED ON ASSET RENTAL AND ADDITIONAL SERVICES



1

INDEPENDENT
BUSINESS

ZEPPELIN

CAT Rental
STORE

2

CRITICAL SIZE OF FLEET
TO ENSURE PROFITABILITY



Central
fleet

Asset
mgmt
tool

Dynamic
pricing

3

ADDITIONAL
PRODUCTS & SERVICES
TO ACCESS
FURTHER MARKETS

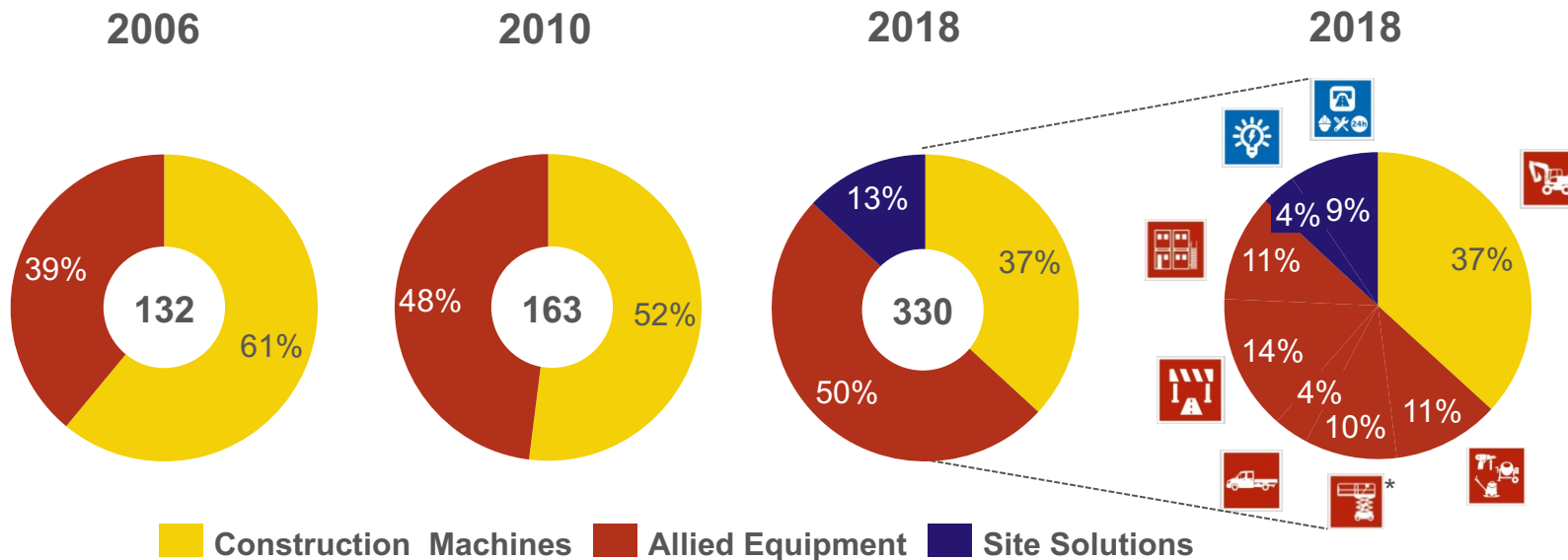


PRODUCT MIX

FROM FOCUSING ON COSTRUCTION MACHINERY TO A BALANCED PRODUCT PORTFOLIO



Rental and service revenues in € m/ ZRD



UNIQUE OFFER

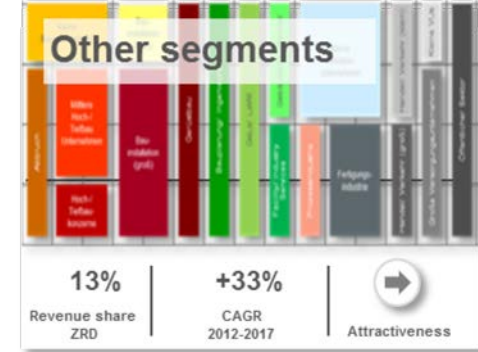
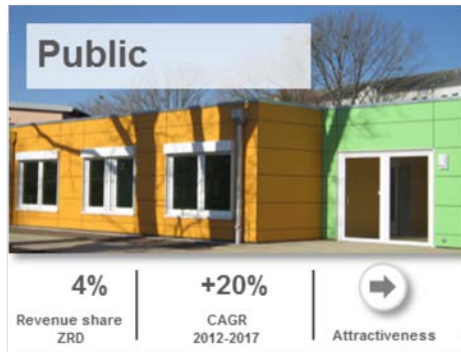
SOLUTIONS FOR EACH STAGE OF A CONSTRUCTION PROJECT



PLANNING	SITE PREPARATION	EARTH MOVING	BUILDING CONSTRUCTION	INSTALLATION	COMMISSIONING
Logistics Planning Traffic Management Health & Safety Coordination Operating Transfer/Outsourcing Online Logistics Control System	Logistics Coordination Modular Space Access Control Electrics & Energy Construction Site Safety Traffic Safety	Construction Machines Construction Equipment Vehicles Service & Maintenance	Logistics Coordination Electrics & Energy Waste Management Training & Instruction Working Platforms Heating, A/C & Power	Logistics Coordination Construction Equipment Scaffoldings Hoists Telehandlers and forklifts	Material Testing Industrial Equipment Building Assessments Building Inspection Landscaping & Gardening Equipment

CUSTOMER SEGMENTS

SOLUTIONS FOR A VARIETY OF CUSTOMERS



MEWPS @ ZEPPELIN RENTAL

REASONS FOR STRATEGIC FOCUS ON MEWPS



KEY TO ACCESS THE INDUSTRY SEGMENT



CROSS-SELLING-POTENTIAL



HIGHLY FRAGMENTED MARKET WITH ONLY FEW NATIONWIDE COMPANIES



Market volume: > € 1 bill in 2018*

Market growth: 4% increase
in sales in 2019*

ATTRACTIVE MARKET

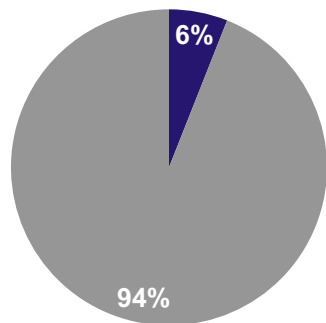
*Source: bbi analysis of MEWPs

COMPETITORS

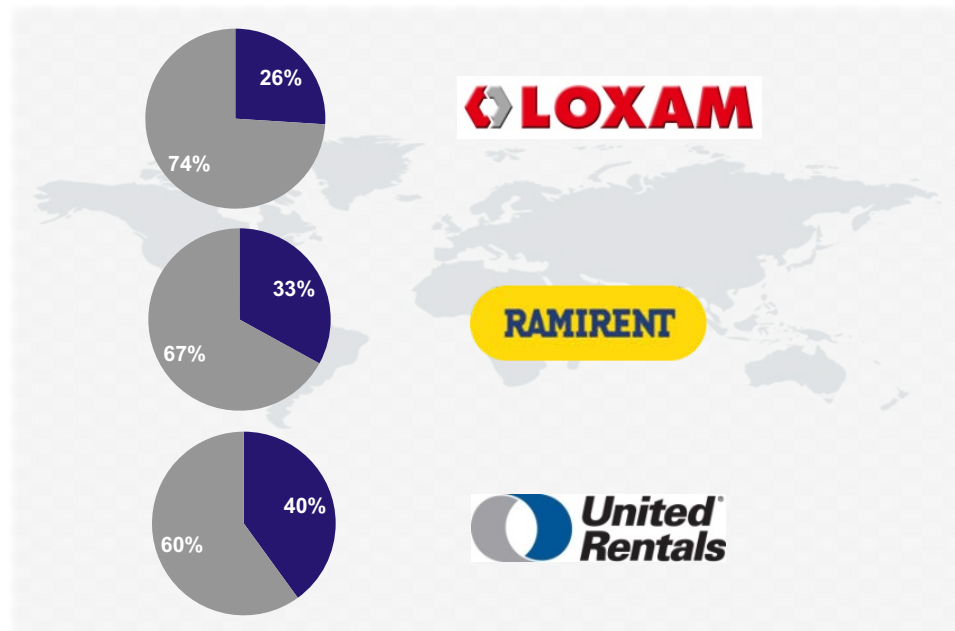
SHARE OF MEWPS WITHIN THE PRODUCT MIX OF OUR COMPETITORS IS SIGNIFICANTLY HIGHER



Rental revenues in 2018 in %

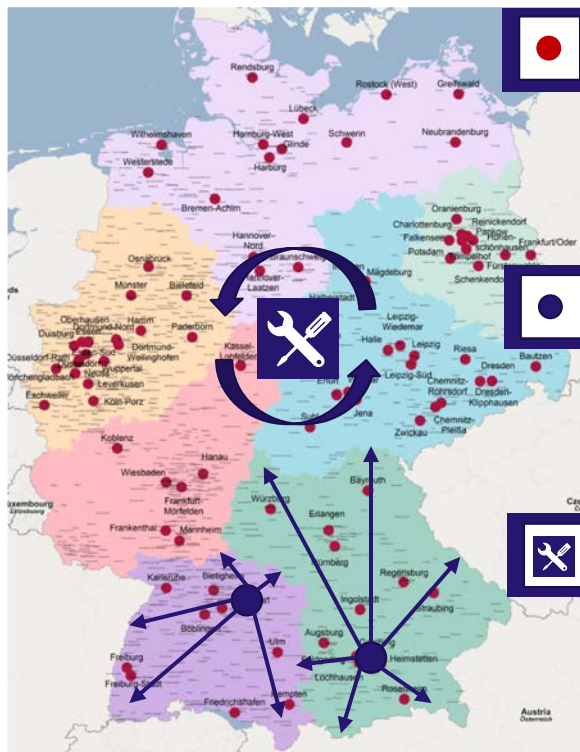


■ MEWPs ■ Others



SERVICE AND LOGISTIC CONCEPT OF MEWPS

RENTAL AND SERVICE THROUGHOUT GERMANY



RENTAL BRANCHES

- Rental of MEWPs possible at each rental branch



SERVICE HUBS

- Centralized warehousing, service and logistic management
- Piloting in two sales territories
- Increased efficiency in logistic processes

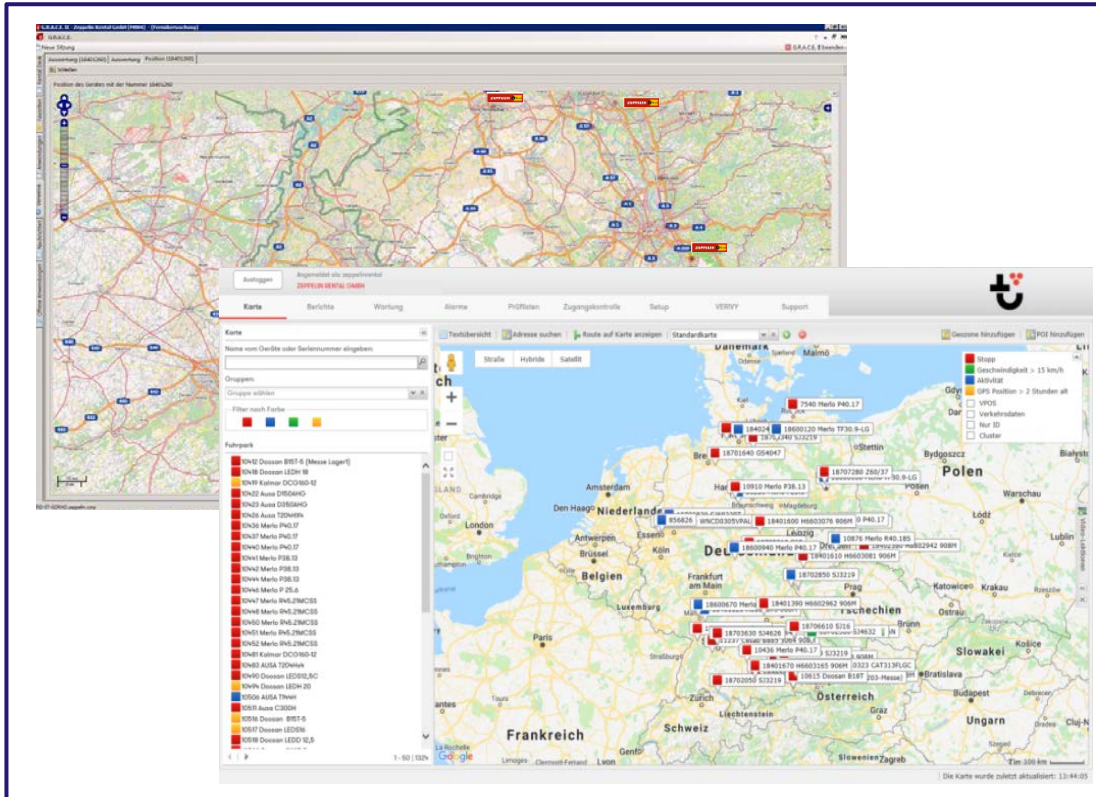


MOBILE SERVICE NETWORK

- Technicians servicing MEWPs around Germany

TELEMATICS

TELEMATIC TOOLS IN MEWPS TO LEVERAGE EFFICIENCY



STATUS QUO

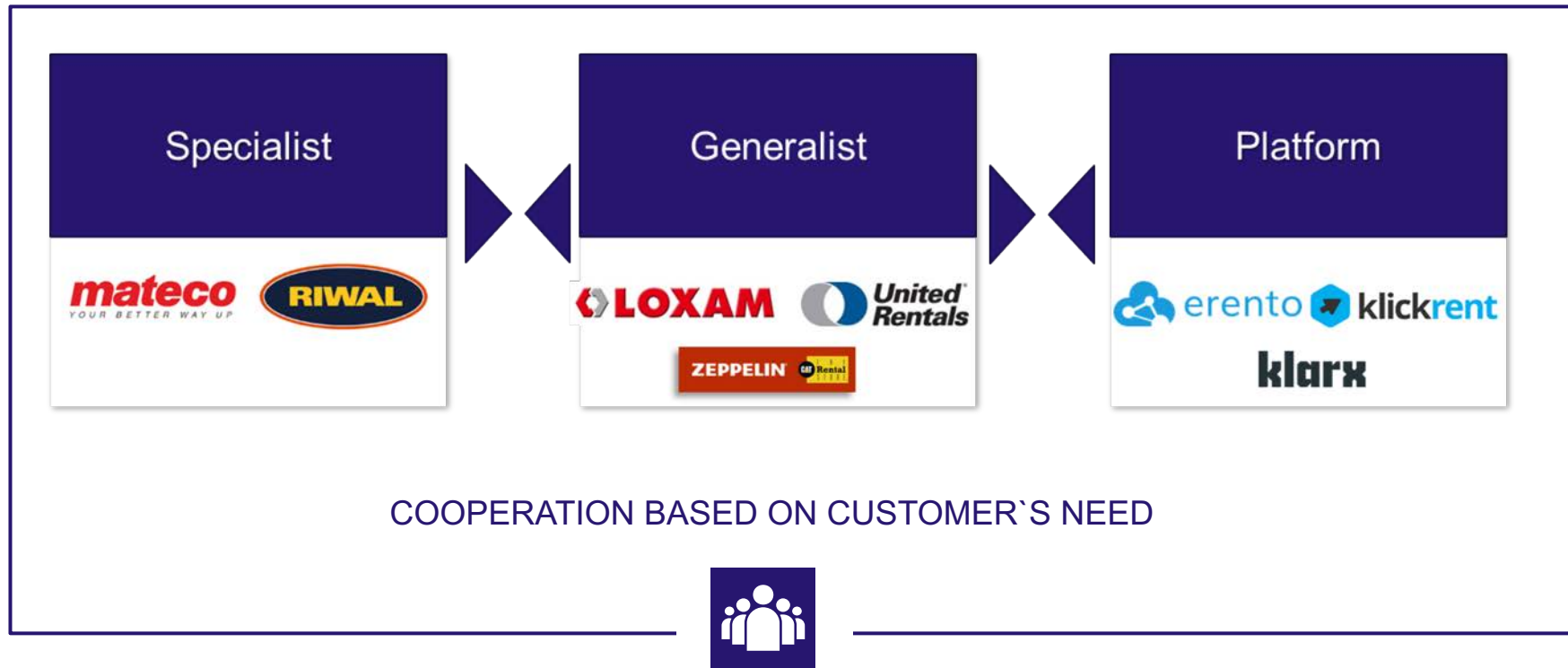
- Location
- Working time

PLANS FOR THE FUTURE

- Battery status
- Battery charging cycle
- Fuel consumption
- Idling cycle

STRATEGIC ALIGNMENT

COLLABORATION IN MEWP-BUSINESS BECOMES NECESSARY



IMPORTANCE OF MEPWS



MEWPs as a key product
to access new markets



MEWPs as must-have to be
an integrated solution provider



MEWPs to internally raise
awareness for safety issues



THANK YOU AND ALL THE BEST FOR YOUR FUTURE BUSINESS

