

Italy Power Rental Market - Strategic Assessment & Forecast 2023-2029

Market Report | 2023-08-29 | 101 pages | Arizton Advisory & Intelligence

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Report description:

The Italy power rental market is expected to grow at a CAGR of 3.98% from 2022 to 2029.

KEY HIGHLIGHTS

- In May 2023, Mollo Noleggio acquired Friuli-based PMP to expand its presence in the market. In 2022, the company acquired Monia Noleggi, a specialist in aerial platforms, along with Parmiani Noleggi. With these acquisitions, Mollo Noleggio has increased its presence nationwide with 49 centers. A similar trend of consolidation of the market is expected to continue shortly.
- The European Rental Association launched a calculator to assist the manufacturers and end users in simplifying the environmental consequences created by a particular piece of equipment. This will also help in understanding the metrics and whether the equipment fits into the requirements of the adopted green regulations while determining the machine's carbon footprint and forthcoming decisions of the company's investment.
- One of Italy's notable achievements in 2022 was its reduced reliance on Russian natural gas imports. This was made possible by signing new contracts with alternative suppliers and leveraging the pipeline and LNG (Liquified Natural Gas) infrastructure developed over the past decade. Italy strengthened its energy security by accelerating the shift to alternative energy sources and emphasizing energy efficiency, particularly in the building sector. It took important steps towards meeting its climate targets.

SEGMENTATION ANALYSIS

Segmentation By Fuel

- Natural Gas
- Diesel
- Others (Propane, Hydrogen, Renewable Sources)

Segmentation By Power Rating

- <75KVA

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- 75-375KVA
- 375-1,000KVA
- Above 1,000 KVA

Segmentation By Equipment

- Generators
- Load Banks
- Transformers
- Others

Segmentation By End-User

- Construction
- Retail
- Oil & Gas
- Mining
- Events
- Utilities
- IT & Data Center
- Manufacturing
- Others

Segmentation By Application

- Standby
- Continuous
- Peak Shaving

Italian Government's Investment in Tourism and Rail Projects to Increase the Demand During Construction and Operation

-□The Italian Ministry of Tourism observes the 2025 Jubilee as an opportunity, and a portion of the EUR500 million (\$551 billion) Caput Mundi project budget has been set aside to boost Rome's tourist appeal. As a result, the suburbs of the city will observe considerable changes. A total of EUR354 million (\$390 million), including roadways and social housing improvements, will be allocated to Rome's outskirts.

-□Over the next decade, Italy plans to invest 110 billion euros (~\$120.8 billion) in rail infrastructure. FS Italiane's 2022-2031 industrial plan, unveiled in May 2021, aims to create an integrated and sustainable multimodal transport network with highly developed transport hubs. The objectives include doubling rail freight transport shares and generating 40 percent of FS Group's energy through renewable sources by 2031.

-□Italy has earmarked EUR59 billion (~\$64.8 billion) under the National Resilience and Recovery Plan (NRRP) to boost the adoption of renewable energy sources from 2021 to 2026. The country aims to completely phase out coal usage by 2025 and increase the share of renewables in electricity production to 72% by 2030 and eventually to 95%-100% by 2050. Achieving these goals entails adding 70 GW of electric renewables to reach a total capacity of 128 GW by 2030, alongside strengthening electric networks for a seamless transition to clean energy sources.

Ongoing Energy Transition, Digitization, and the Importance of Temporary Power to Boost the Italy Power Rental Market

-□Microsoft is set to launch its first cloud region in Italy, comprising three data centers in the Lombardy region, announced in June 2023. The new cloud region, delivering top-tier security, privacy, and performance, aims to accelerate the digital transition of local organizations and public entities. The initiative aligns with Ambizione Italia, a five-year, USD 1.5 billion investment plan to

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stimulate growth via cloud technologies.

-□ Milan is expected to become one of Europe's most modernized cities, with significant public and private developments and an anticipated USD 13 billion investment by 2030 (including USD 2 billion for public urbanization projects). Additionally, the housing industry in Milan will add 33,000 units by 2030, accommodating 100,000 individuals. The developments need reliable power solutions to support their construction and facilitate the needs during the Winter Olympics 2026, presenting a lucrative opportunity for the Italy power rental market to meet the growing infrastructure needs in the region.

-□ Under the 'Infrastructure for Sustainable Mobility' program, a total amount of EUR31.4 billion (EUR25.1 billion from the RRF Facility and EUR6.3 billion (~\$6.9 billion) from the fund) has been allocated. The primary goal is to develop modern and sustainable transportation infrastructure that reaches all regions of the country.

VENDOR LANDSCAPE

-□ The key players in the Italy power rental market are Loxam, United Rentals, Aggreko, Atlas Copco, Cummins, Caterpillar, and Kohler Power.

-□ In May 2022, Aggreko strengthened its European load bank fleet with a further USD 5 million investment, bringing the total to over 500 units, to ensure that the distinctive demands of individual data centers across the region are met.

Prominent Vendors

- United Rentals
- Aggreko
- Loxam Group
- Caterpillar
- Atlas Copco
- Cummins Inc.
- KOHLER

Other Prominent Vendors

- Kiloutou
- Rentalload
- Boels Rental
- ONIS VISA
- COELMO
- Powering

KEY QUESTIONS ANSWERED:

- 1.□ How big is the Italy power rental market?
- 2.□ What is the growth rate of the Italy power rental market?
- 3.□ What are some significant growth opportunities in the Italy power rental market?
- 4.□ Which fuel type is projected to dominate the Italy power rental market?
- 5.□ Which are the key vendors in the Italy power rental market?

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