

Results of the FEDESSA European Survey 2013 by Rodney Walker

For the second year running FEDESSA and its associations (less the UK Association) have carried a simple annual survey to run alongside the deeper survey which the UK Association has undertaken for the past 7 years. UK results have been added where they are appropriate. There is no doubt that the results this year are more representative of the industry across Europe – more companies in a wider spectrum of countries sent in their statistics than in the first year and we hope that this trend will continue.

Survey results

Chart 1 shows the results by country of the survey. You can see that there is little difference between the average net rentable size of facilities in the UK and the rest of Europe – just over 4,000 square metres. However there is considerable disparity between the percentages of purpose built facilities against converted buildings across the regions. There is also some difference between the percentages of private customers as opposed to business customers both by numbers and by space used; the average here changes somewhat when the UK is added as the percentage of its business customers has grown during the recession.

The estimated size of the European industry

Additionally FEDESSA and associations have tried to estimate the total number of self storage facilities in each nation and, based on national average sizes, to calculate the size of the industry in each country. The resulting figures must be treated with a strong health warning as, firstly, it is the case that it is often difficult to make a judgement on what is and what isn't a self storage operation/facility; secondly, using the averages of the main industry may well not be appropriate for those who are not members (resulting in an over estimation of the size of the industry) and thirdly as the effectiveness of the estimation of the numbers will vary between countries. Nevertheless the resulting figures, for the first time, give us a reasonable baseline to build on.

Our estimations of size are shown on Chart 2 which you will note also adds some information on a number of countries which are not yet members of FEDESSA.

- Our estimate suggests for the first time that there are more than 2,000 facilities of varying sizes across Europe.
- They provide storage to over 750,000 customers.
- Together they provide over 8 million square metres of current rentable space. The total available space when all facilities are fully built out is approximately 9 million square metres.
- This available space averages out at 0.016 square metres per person. However for the first time we have noted that it seems that at least 3 countries are now providing more space per person than the UK.
- The population of Europe in the countries where we know that self storage exists is closing in on 500 million – much larger than the USA.

Finally we show the size of the industry by nation on the pie chart, Chart 3. There are probably no surprises here but something tells me that in a few years' time the picture might look rather different.

We hope these figures will be of use to you. We welcome feedback, both in agreement or contradictory and we are fully aware of your appetite for anything which helps you sell your business to customers and financiers!

ESTIMATED SIZE
as at 15/12/2013

CHART 2

COUNTRY	Population	Number of facilities	Total rentable sqm	sqm per person	Storage facilities per million population
Austria	8,420,047	30	117,000	0.014	3.6
Belgium	10,771,720	29	161,820	0.015	2.7
Czech Republic	10,505,291	3	10,122	0.001	0.3
Denmark	5,604,953	85	347,480	0.062	15.2
Estonia	1,320,657	1	1,000	0.001	0.8
Finland	5,394,113	85	286,195	0.053	15.8
France	63,854,642	245	931,980	0.015	3.8
Germany	81,767,140	86	335,314	0.004	1.1
Hungary	9,927,150	1	6,000	0.001	0.1
Ireland	4,668,409	25	84,175	0.018	5.4
Italy	61,379,361	45	204,030	0.003	0.7
Latvia	2,212,161	2	5,000	0.002	0.9
Norway	4,962,447	36	82,008	0.017	7.3
Poland	38,243,128	6	15,150	0.000	0.2
Portugal	10,742,092	16	44,000	0.004	1.5
Romania	21,311,519	2	8,000	0.000	0.1
Spain	47,072,870	167	530,392	0.011	3.5
Sweden	9,476,348	90	356,490	0.038	9.5
Switzerland	7,739,108	15	42,045	0.005	1.9
The Netherlands	16,807,782	264	1,188,264	0.071	15.7
UK	63,220,315	830	3,237,000	0.051	13.1
TOTALS	485,401,253	2,063	7,993,465	0.016	4.3

