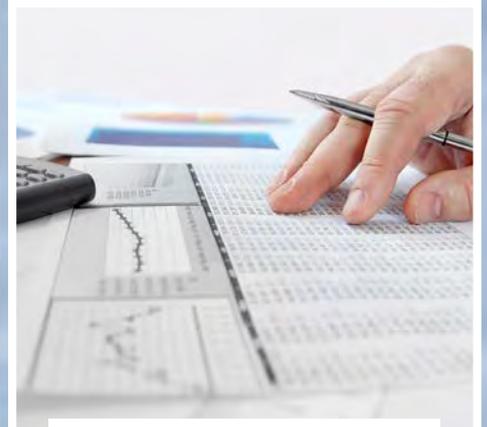


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Norway - Second Space



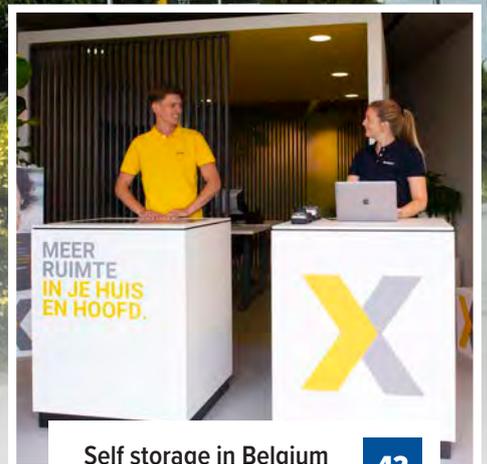
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Self storage in Belgium and the Netherlands

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Editorial: News items and articles on all aspects of the self storage industry are welcomed and should be sent, together with photographs if appropriate to: hbourke@ssauk.com

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Carlo Swaab
FEDESSA President

There is a sample of the initial results in this issue of the magazine with the full report available on 20 September

Another benefit of attending the FEDESSA Conference will be the trade show, the biggest of its kind outside the USA

Technology is also changing the way people access their self storage site as well as reserve units

President's Report

It looks like we are finally putting the impacts of COVID-19 behind us as the vaccination programme rolls out across Europe, with social distancing requirements easing and travel slowly opening up. Let's hope we have seen the last of lockdowns. After almost 2 years we will be able to have in-person meetings again with the FEDESSA Conference & Trade Show in Birmingham in September, and more events planned for the start of 2022 including local conferences in Sweden, Spain, Italy, and the Netherlands and the SSA UK Winter Workshop in St Anton now open for bookings. It will be good to be able to meet our industry colleagues and suppliers in-person again.

The FEDESSA Annual European Industry Report prepared in conjunction with JLL will be released at the conference in Birmingham. As most would expect it will show that the industry has performed well over the past 12 months. The ability to remain trading through lockdowns for most businesses, combined with the demand for storage increasing due to changes from the pandemic, resulted in average revenue per square foot increasing by around 7% along with a healthy increase in occupancy rates and total supply. There is a sample of the initial results in this issue of the magazine with the full report available on 20 September. While so far demand for the product has remained strong in 2021, steel shortages are beginning to impact building projects and the full economic impact of COVID-19 is yet to be felt with many government incentive schemes only now being wound down. How many people will return to office work full time or remain working from home remains to be seen, as does what will international travel look like? So, while the future outlook for the industry remains strong, there is still uncertainty which in itself is almost the new normal now.

Another benefit of attending the FEDESSA Conference will be the trade show, the biggest of its kind outside the USA. With over 40 companies represented already, including 8 never seen before at a FEDESSA Trade Show, there is something for everyone. From construction and insurance to online auction platforms, mobile access systems and online space calculators, you will find everything you need for your self storage business all in one place. Just another reason to book your tickets to the FESESSA Conference now. I look forward to seeing you there.

As we prepare for the industry to move into the post pandemic normal, the FEDESSA Board will be meeting in September to start the first of our strategic planning meetings. It is an opportune time for the board to consider the direction of FEDESSA and its member associations. While the industry in Europe has held strong during the pandemic there will certainly be more challenges to come. The European standard is due for review soon. There are growing requirements for an environmental standard for the industry in terms of operations and construction as the push for carbon neutral business continues. As the industry grows, associations must manage the emergence of container based storage, unmanned stores and other adaptations to traditional self storage. Technology is also changing the way people access their self storage site as well as reserve units. All this and much more will be considered by the Board as they look at how FEDESSA can assist member associations moving forward.

If you have any ideas or suggestions on how FEDESSA or your association can help your business, or projects you think the associations should be involved in, please forward them to our CEO at rschafer@fedessa.org so we can consider them in the planning process.

Carlo Swaab
FEDESSA President



Rennie Schafer
SSA UK and FEDESSA CEO

The Networking Dinner will be held at the outdoor venue of Warwick Castle to allow networking comfortably in an open-air environment

On the first day there will be special break out sessions specifically covering issues that are relevant to container storage

Reflections from the CEO's Desk...

It's another period of change for the team at the SSA UK and FEDESSA. Having had to rapidly change to working from home, online events, a new CRM system and much more in 2020, we are now moving back into the office, resuming in-person events, and trying to work out what the "new normal" will be.

We will continue to offer online events in the future, particularly training based events, as the feedback from members has been overwhelming supportive of the online medium. The annual FEDESSA Conference & Trade Show will clearly be held in-person, with this year's event being held in Birmingham on September 20 and 21. At the time of writing, the UK had removed almost all social distancing requirements for business events, which is a positive sign. We are also seeing travel restrictions easing, particularly for vaccinated travellers. As the vaccination programme continues to roll out in Europe, we are confident European members will be able to travel to the UK, which is on track to be largely speaking, fully vaccinated by September. This event will be changed by the pandemic as almost everything has been. We have allowed for extra space so attendees will not be forced together. The venue is all on one level to remove "pinch points" at lifts and escalators while moving around. The Networking Dinner will be held at the outdoor venue of Warwick Castle to allow networking comfortably in an open-air environment. We are doing all we can to ensure this event will be a success for all who attend, and importantly will also be safe for delegates and exhibitors.

This year's FEDESSA Conference will also have unprecedented coverage for container-based storage operators. On the first day there will be special break out sessions specifically covering issues that are relevant to container storage. There will also be an extension of the trade show in the adjacent car park with a Container Park allowing suppliers to show off their self storage containers. This will include purpose built flat pack style storage containers as well as stacked shipping containers with built in access platforms. A unique chance for self storage operators to see different types of storage containers all in one place.

As I mentioned earlier the SSA UK staff are beginning to move back into the office after an absence of almost 18 months. Having set up the systems to successfully work remotely, we will continue to have staff working in a hybrid mix of office and remote based locations. We believe this will not only continue to provide our members with the excellent levels of customer service they are used to, but also provide the right balance of flexibility, mentoring and support for the staff. We have also hired an additional member to the team. Stephen Ramage will work alongside Hannah on membership services, in particular, recruiting more existing operators into SSA UK membership.

Finally, I would like to take this opportunity to thank my team who have all well and truly risen to the challenge over the past 18 months. It has certainly not been easy and every one of them has done all that was asked of them and more to ensure we continued to provide the highest level of service for our members. Paola, Helen, Bryony and Hannah, thank you for all you have done, I truly appreciate it as I am sure all the members do as well. I look forward to seeing you all in person more regularly and to having the smell of fresh oatcakes at lunchtime on our return to the office!

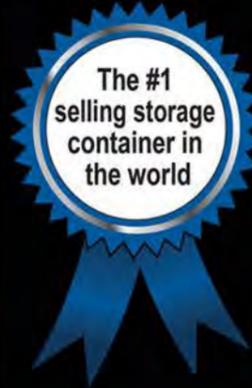
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FEDESSA & SSA UK Forthcoming Events



7 September 2021 - Sector Forum Technology & Innovation

Led by Fred de Ryckman de Betz, this Sector Forum is one of our most popular. The next meeting will focus on ID apps.



14 September - Sector Forum Security

Chaired by Barry Rimmer and John Daprano from PTI Security, the focus of the next meeting will be on CCTV and alarm monitoring for 24/7 self storage.



20 & 21 September 2021 – FEDESSA Conference & Trade Show

The FEDESSA Conference is back and ready for you to network with hundreds of other self storage owners, operators, suppliers and investors. Everything you need for your self storage business, all in one place! Chaired by Mark Durden-Smith, and sponsored by Janus International, the conference offers yet another superb line-up of well-known business speakers as well as industry experts providing valuable business improving topics. If you haven't booked yet, please turn to page ?? for further details and information on how to book your place.



7 October 2021 - CEO Update Webinar

Hosted by SSA UK CEO Rennie Schafer, join us for our complimentary, monthly member's only update including the latest sector news. We will of course have one or two guest speakers too and details will be published on the website nearer the date.

For further information and/or to book, please visit www.ssauk.com/events/calendar.html

Recent Online Events

- | | |
|---|---|
| 25 May 2021 - Sector Forum Security | 8 July 2021 - Effective Sales Skills for Self Storage |
| 8 June 2021 - Sector Forum UK Legal | 24 August 2021 - YSN Members Meeting |
| 29 June 2021 - Practical Marketing Training Session | 2 September - Customer Service Excellence |
| 6 July 2021 - Sector Forum Containers | |

Missed an event?

Many of our training sessions are repeated throughout the year so there will be further opportunities to attend. Complimentary webinars including the CEO Updates are recorded and available to members to download and view from the member's only area of the SSA UK and FEDESSA websites. The very popular Sector Forums are also held 3 times per year so you can book a place on a future date if you've missed a meeting and the YSN hold regular member meetings too.



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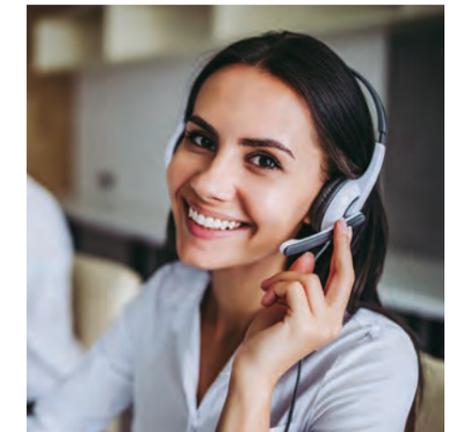
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Welcome to the newest member of the SSA UK team

Stephen Ramage

Stephen is 32 and grew up in Stoke-on-Trent. Following University where he studied Sports Journalism, he spent 2 years travelling the world and living in Australia.

Stephen joins us from a career in the motor trade where he worked for over 8 years, starting as a sales executive, graduating to a business manager and finally, a sales manager. His new role at the SSA UK is a Membership Services Officer, focusing on the acquisition of new members from across the UK. His in-depth sales experience will help us to recruit more members into the benefits of Association membership.

Asked about his new role, he said. "I'm really excited to get started, get out there and meet everyone in the sector. It's a completely new world to me and I hadn't even visited a storage facility until I joined the SSA UK! I'm looking forward to immersing myself in the industry and helping existing and new members flourish and get the most out of their businesses."

He considers himself an avid Stoke City fan and is a keen golfer. His hobbies include football, golf, music and travelling. His favourite food is Buffalo Chicken Wings, his favourite film is Dead Man's Shoes, and his favourite TV show is The Office (obviously). Stephen's hero is Ricky Gervais and not just for the TV show but for his outlook on life, sense of humour and numerous charitable endeavours.

We asked Stephen if there were any interesting facts about him and he replied "I once performed on stage and won a breakdancing competition with 'So Solid Crew' when I was 11. I've also been bitten by a variety of exotic animals on my travels including a monkey in Borneo, an alligator in Florida and closer to home, a giraffe at the West Midlands Safari Park. I also once wrote and performed a song for a first dance at my friend's wedding in just 30 minutes..... because I'd completely forgotten to buy them a gift."

We are of course delighted to have him join the team and wish him every success in his new role.



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MSO & Upgraded Members

With restrictions easing and the country getting back to more normal times, the virtual upgrade visits for provisional members are now back in full swing.

Businesses have rapidly adapted to the use of new technology during the pandemic and the use of online resources such as Zoom, video calls and online management systems and the SSA UK is no exception with the decision to go virtual for upgrade visits.

As Membership Services Officer, I was a little hesitant about the change and how successful these might be. However, with a backlog of pending visits and a keen interest in technology, I embraced the need for change.

The visit follows a similar process but is conducted via Zoom between the MSO and a store manager or owner, allocating around a one-hour time slot to ensure all the paperwork can be completed as well as the virtual show round of the facility. To date there have been no major issues and the process is just as easy as in-person.

“Membership upgrade was a quick and simple process, with the help of Hannah” said Lewis Blaney at Crest Self Storage.

Of course, I miss the chats with members whilst on-site but on a plus note, and from experience of many previous visits, I know that not all facilities are conveniently situated in towns and cities, with some being so remote, your sat-nav loses signal and you find yourself completely lost for a time. That can't happen on a virtual visit!

For members who are ready to be visited, note you will be required to have:

- An account with Zoom to access the meeting (a free account is sufficient)
- The ability to walk around your facility with a device that is compatible with Zoom while live streaming the visit (smart phone or large tablet is recommended)
- A strong wi-fi and signal connection

An in-person visit within the following 12 months will be arranged to confirm sightings from the virtual tour.

We are pleased to advise the following provisional members have now gained FULL member status following a successful 'virtual' upgrade visit:



And finally, a reminder of the additional benefits of full membership:

- Inclusion on the 'Storage Facility Finder' on the SSA UK website
- An SSA UK Full Member window sticker for the current year for display at each facility
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Membership Benefit – events and networking

Of all the membership benefits, there is no doubt one of the most important and beneficial to business is **networking**. It is essential to develop relationships and connections to build a network of contacts and interacting with others helps you to stay in touch with the latest trends, provides a route to useful information and resources and access to opportunities.

However, in recent times this may have felt like a distant memory. We adapted, mainly courtesy of Zoom, which although proved useful due to necessity, it is limited, situated in a cold environment, uncomfortable for some and downright frustrating for others.

Nevertheless, little compares to seeing others in-person regardless of the setting and pre-pandemic most of our events were in-person. However, with the easing of restrictions, we can now return to physical interaction once again with industry colleagues wherever possible.

A reminder of the **networking** opportunities Association events offers to members:



FEDESSA Conference & Trade Show

It's back! One of the most eagerly anticipated events of the year! Join us at the newly refurbished Hilton Birmingham Metropole Hotel, NEC, **Birmingham, UK on 20 & 21 September 2021 for the 22nd annual industry event**. Chaired by **Mark Durden-Smith**, the conference offers yet another superb line-up of well-known business speakers as well as industry experts and the largest self storage trade show outside the USA. The **networking** at this conference is

unrivalled from Breakfast in the Trade Show and visits to the Trade Show during breaks and lunch over the 2 days, the Networking Dinner at Warwick Castle and not forgetting, the Annual Industry Awards Dinner. Don't miss out to re-connect with existing and new industry contacts at this event. For more details and how to book, see page [????](#).



Annual Winter Workshop

This exclusive event for just 50 attendees is being held from 27 February to 2 March 2022 at Raffles St Antonerhof - St Anton, Austria. Arrive on 27 February ready for two full days, each consisting of business sessions aimed at business management over breakfast before hitting the slopes and rounding the day off with more sessions and **networking** dinners before flying home on 2 March. The all-inclusive package includes breakfasts, 3 nights of accommodation, pre-dinner drinks, three **networking** dinners, a 2-day lift pass, private transport to and from Innsbruck or Zurich and great skiing. As numbers are strictly limited, book early to avoid disappointment by visiting:

www.ssauk.com/events/winter-workshop-2022.html

Regional Members' Meetings & Business Lunches

Held in regional locations including Birmingham, London, and Manchester the evening events are a great way to **network** with industry colleagues over a first-class dinner with wine and great entertainment. Business lunches also offer excellent opportunities to **network** and build on existing or new industry relationships but regardless of which you attend, these events are a worthwhile investment to meet fellow operators, share best practice, meet suppliers, gather information, and secure new opportunities.



Training Sessions

Designed specifically for staff and managers in self storage, topics are carefully chosen to support your business, are led by industry experienced professionals, and usually delivered in a live workshop environment. **Network** with other delegates and share your experiences. Topics include:

- UK Legal Issues
- Pricing Strategy
- Selling Self Storage Online
- Effective Sales Skills for Self Storage
- How to implement Dynamic Pricing
- Customer Service Excellence
- Operational
- Practical Marketing
- Improve your revenue through Add on Sales
- Social Media Marketing
- Sales Training for Self Storage Professionals
- Recruit & Retain a Winning Self Storage Team

For the time being, or at least for the remainder of 2021, the **Sector Forums** will remain online as feedback has shown that for a one, to one and half hour meeting, online is a more efficient use of a working day and with no travel costs. The opportunity to just login for such a short amount of time and yet gain a huge amount of information from our very experienced and knowledgeable Chairs, has proven to be popular. Our sector forums cover, Containers, Security, UK Legal and Technology and Innovation. If you haven't attended one of these meetings yet, you will not be disappointed if you do.

Of course, the regular, monthly **CEO Update Webinar** held on the first Thursday of each month will continue online. Still popular and often with guest speakers, it's worth attending for the latest updates within the industry.

All events are suitable for existing members but we encourage new members to attend to meet the FEDESSA & SSA UK teams, suppliers and other operators.

For more information on upcoming events, visit the Association websites for details and how to book:

www.fedessa.org or www.ssauk.com/events

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The UK government is currently undergoing a fundamental review of the process of valuations for calculating business rates. In July they published a further consultation paper as part of this review under the heading 'More frequent Revaluations'. The paper furthers the work previously released campaigning for a change to 3 yearly reviews of property values. However, it also introduces a significant change with a duty to Notify the Valuation Office Agency (VOA) of changes to the occupier and property characteristics that affect liability for business rates. This is a significant change to the current system that could have a major impact on self storage businesses that are expanding their sites, including container-based operators that are progressively adding containers to their business.

Extract from the paper:

Duty to Notify

2.5 Under the current system, there is no mandated requirement for ratepayers to notify either the VOA or Billing Authorities (BAs) about changes to the occupation of a property, or changes to the characteristics (e.g., physical structure, fittings, use) which may have an impact on liability for business rates. The exception is when a ratepayer wishes to enter the appeal system and needs to make a Check to do so. This differs from most other business taxes, where taxpayers are typically required to notify collecting authorities of changes.

2.6 The new Duty to Notify provision would introduce a mandatory requirement for rateable occupiers to notify the VOA of changes to the occupier, or changes to relevant property characteristics. These are likely to include, but are not limited to:

- structural alterations to the property such as extensions;
- the property being demolished completely or in part;
- conversion of parts of the property, for example a store room to an office;
- the property being split into two or more new properties, or merged with another;
- any change in use of the property, for example from a shop to a cafe, or a change from non-domestic to residential use.

2.7 Details of changes would be required to be made reasonably soon after the relevant change, to support a timely flow of information. These notifications would be made through an online portal, designed to be user-friendly and not highly burdensome on ratepayers. As with the current Check stage, further engagement with the VOA may be required.

2.8 Although Duty to Notify would be self-declaration, it would not amount to self-assessment. The VOA's valuation function would remain the same. The VOA would provide clear and extensive guidance to explain the process in detail, and support ratepayers with compliance with the new duty.

2.9 This measure would help to ensure that valuation officers have the necessary information to compile and maintain an accurate list. Critically, for revaluations, it would also mean that the VOA would be basing their valuations on

a better and more up-to-date evidence base, leading to more reliable valuations. For ratepayers, this would provide assurance that they and others are paying tax based on the right property details, improving confidence in assessments, and reducing the need for Challenges against the list.

“ This is a significant change to the current system that could have a major impact on self storage businesses that are expanding their sites ”

2.10 It would also ensure changes in Rateable value are made closer to the actual change in the property, reducing the need for backdating of bills.

2.11 This would place a new duty on all ratepayers but would be designed and implemented in order to ensure ease of use and impose a low burden on firms.

2.12 An annual confirmation return. Ratepayers would be required to access an online portal on an annual basis aligned with business rates billing, to confirm that the data held for their property remains correct. The data held would be





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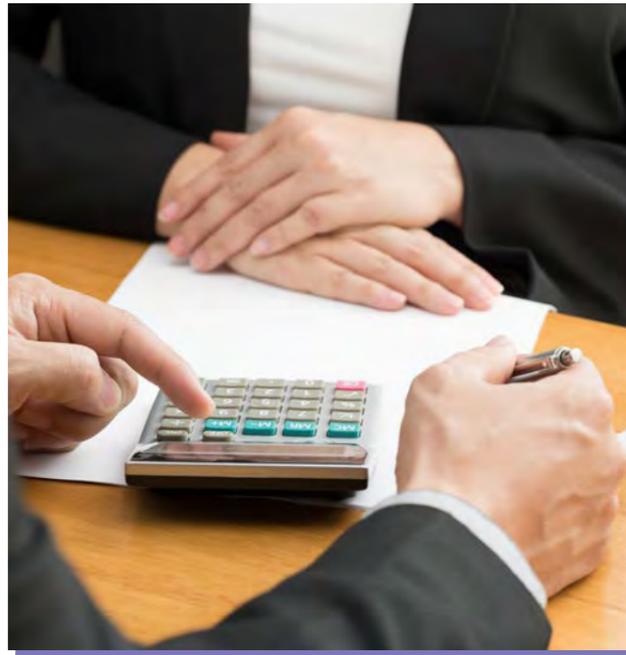
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displayed to users, meaning the user would not have to proactively provide inputs, merely provide confirmation. If the user confirms that the data held is incorrect, the system would automatically re-direct them to update the information held. This would be designed to be a light-touch process, requiring minimal input from ratepayers that have already completed their returns 'on time' during the year.

This is particularly relevant to the self storage industry, where many businesses are developed in stages, with additional units, mezzanines or containers added progressively as the business grows. These additions are often not included in the initial valuation. Under this proposed change, the business owner would need to notify the VOA when additional storage space was added to the business.

This is currently only a consultation paper. However, it would be difficult to argue against such a proposal without pointing out the errors in the existing system. This after all is the very reason for the proposed changes. It is often the case that the Government ends up adopting such consultation papers with only minor amendments.

What we do not know is when this change is likely to be implemented. Currently, the next valuation is set for 1st April 2023 based upon property rental values and the state of the economy at an antecedent valuation date of



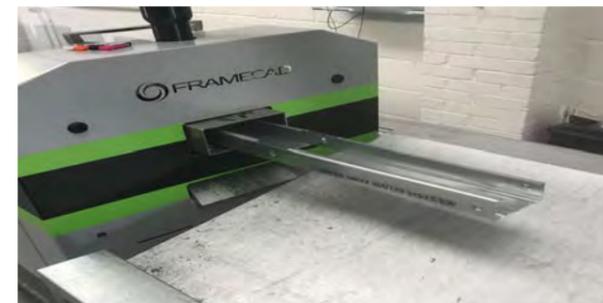
1st April 2021. It is possible that this notification system will be introduced prior to this to ensure these assessments are based on the correct facts. However, the IT system to allow such notifications will need to be developed and this will take some time

The Association in conjunction with Matthews and Goodman are monitoring the situation and will advise further when more information is released.



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How secure are these units?
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From the Legal Desk...

A new regular feature for the UNLOCKED magazine where legal issues raised by members are discussed so members can learn from real life situations.

Deceased business

The self storage business took on a customer who was a kitchen fitout specialist. The contract was taken out in the business name with the signatory of a single person. That person used the storage unit to store kitchen appliances and other materials from his customers while he was working on their kitchens. The customer was regularly in the unit and the store staff knew him well. Unfortunately, he died suddenly. The family did not want to deal with the business, so they wound it up, despite their being assets belonging to the business and customers in the storage unit. Unbeknown to the storage company, the deceased customer was a subcontractor to another kitchen installation company. The first the storage company knew about the death of the customer was when the other kitchen company turn up saying they want to get the goods out of the storage unit for their customers as the person has died. They also got contacted by some of the customers of the business asking about their goods. No one seems to know where the key to the unit is.

The issues

The contract was in a business name, so the death of the person does not directly impact the contract. The contract continues with the business and anyone else who represents it. In this case the sole owner of the business was the deceased. The family should not have been able to close the business down while it possessed other people's goods. However, they probably did not declare this when applying to have the company wound up. The storage company could apply to have this reversed but this would take considerable time and effort.

There was no legal exchange of customers, assets or, anything else from the deceased's company. It appears the family just told the other company that they could have whatever they wanted. If they had formally sold or otherwise transferred the business or the customer list to the new company, then they would have some legal standing to take over the contract or at least remove the goods pertaining to the company.

The storage centre is in a predicament as they know the goods do not belong to the Storer (company) but they also do not know who they belong to. If they let someone into the unit that person could take away goods that don't belong to them and the storage company would have no way of verifying whose goods are whose. They could go down the normal default process, but this will take months with a wound-up business and clearly the kitchen customers want their goods. They also do not know if this new kitchen company has an arrangement with all the customers of the old company or only some. There is also the issue that they have a contract with a business that has been wound up, which poses its own legal challenges.

Solutions

If the new company had a key to the unit, then they could conceivably access the space, clear the unit out and then leave it abandoned for the storage business to close the contract. This would be similar to the procedure for the deceased estate of an individual.

As no key could be found the storage company asked the new kitchen company to sign a declaration that the deceased's company had been working as a subcontractor for them and that the goods stored in the unit were related to their customers. While not an entirely robust solution, this was deemed to be the most practical way to resolve the issue. Given that the business should not have been

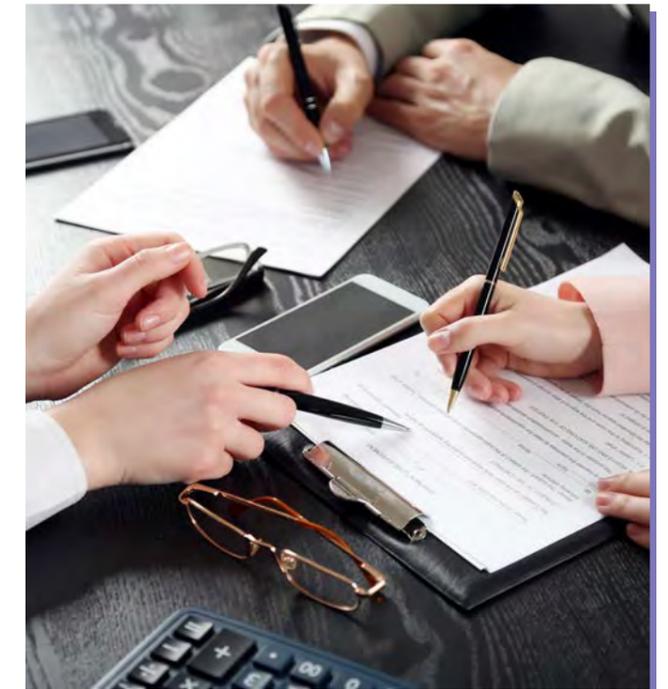
wound up in the first place, the storage company had reasonable grounds to take this action.

In the end the company signed the declaration but also found a key to the unit so were able to access the unit and remove all the goods. This left the unit open and empty. The Storage company then sent an abandoned unit letter to the last known address of the company which effectively terminated the contract and allowed the unit to be used by another customer.

Lessons to be learned

This is a case where the storage company did not do anything wrong. They had a signed contract with the business. It was the actions of others that led to the problem. However, it does indicate the risk of having businesses using the storage unit to store goods that do not belong to them. This would apply to removers and other businesses that take their customers goods and put them in a storage unit. The storage company knows the goods do not belong directly to the business which limits their ability to sell or dispose of the goods. It can cause complications if the customer whose goods they are does not pay the business who has the storage unit. Then that

business in turn does not pay the storage fees. That is not to say self storage businesses should not accept these customers, just to be careful if the unit falls into default or as in this case, is wound up.



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Surestore growth continues across the UK

Sitting on a plane for many hours can be somewhat tedious but in the case of Northwest entrepreneurs, Mike Wilson, and Andy Wood, it was the start of an impressive self storage journey.

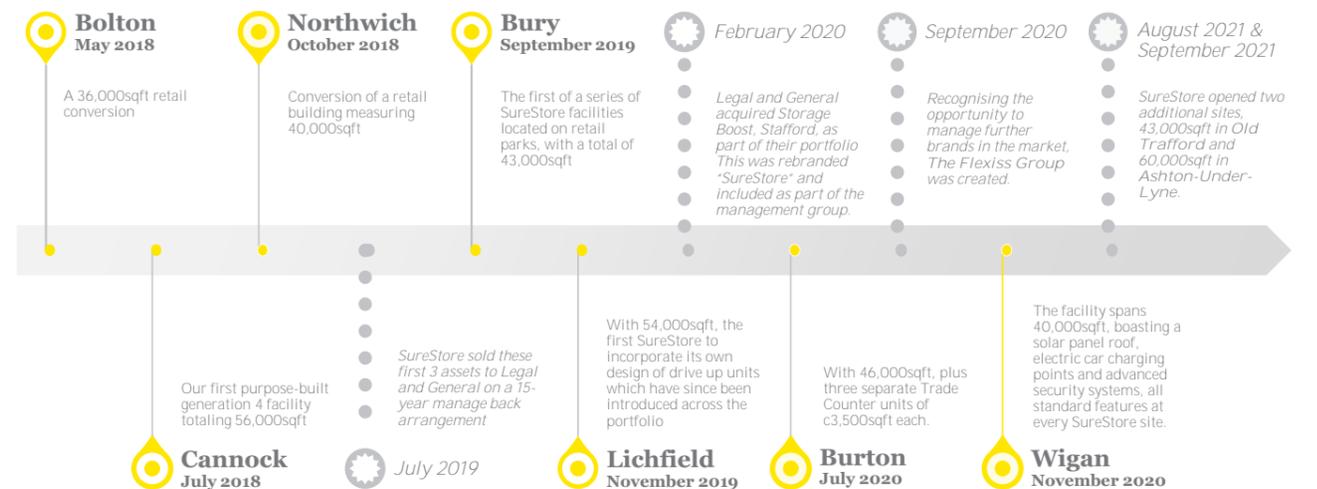
The two first met at the FEDESSA Conference in 2008 and talked about merging their existing businesses, Smart Storage and Storage Boost. However, due to the investment structure at both companies, this was not possible at the time. They stayed in touch though, and Andy worked for Mike as a development consultant as he grew the Smart Storage brand.

However, in 2015 they found themselves sitting next to each other on a flight to the self storage World Expo and the “SureStore” concept was born. Given their experience in the sector and the strength of the market, Mike and Andy

felt confident SureStore would be a success and they spent the next three years putting plans in place and looking for sites in the Northwest and the Midlands.

With the sale of Mike’s, Smart Storage brand in 2018, Andy’s Storage Boost business in 2017 and with an investment package from private equity funders, Seneca Partners, the pair were able to realise their ambitious plans and over the past few years, their SureStore brand has grown to be one of the most rapidly expanding self storage brands in the UK.

The first SureStore facility opened in Bolton in May 2018, a 36,000sq ft retail conversion and since then, they have opened a further 8 stores. The following timeline shows the growth of the portfolio to date:





Recognising the opportunity to manage further brands in the Industry, The Flexiss Group was created in September 2020. Further brands will join the Flexiss management group later this year.

Nine further “SureStore” stores are planned to open in 2022, Southport, Leeds and Telford will be funded by Seneca Partners, whilst Wokingham, York, Loughborough, Stoke, Stevenage, and Bedford, are being developed in conjunction with L&G

Andy said, “As we scale up for growth, we are looking forward to expanding the Flexiss group of brands into further areas of the UK and continue to disrupt the self storage industry in order to better meet the needs of modern consumers and businesses.”

Mike and Andy describe their store designs as the answer to modern storage. Trading and working as “a visionary hybrid of traditional self storage, combining a domestic and business self storage offering, with office space and small form retail.” Capitalising on the gig economy, they cater for those who need storage space and the flexibility to work and sell their goods from the same site.

“We have been spurred on by the knowledge that business users in self storage are growing exponentially. Business owners are recognising that there is a flexible and cost-effective alternative to fixed leases,” said Andy.

The decision to include office and retail space on their sites tied in with this. Occupiers include businesses selling carpets, building services, tailors, florists, and beauticians.

Andy says this mixed business space helps to create a community feel and drives additional customers to the storage facility. “People come in, see what we do and say ‘oh, actually, this is really suitable for me, too.’”

The Flexiss Group’s focus is on user experience. “There

is the need to improve the customer experience, from the moment they walk through the door to when they rent a space and when they move out,” Mike says. “We wanted to make sure the customer experience was paramount in everything we did.”

“Since launching SureStore, our ambition has been to set a new industry standard, not only in the way we design and build facilities but also in the way we serve customers,” said Mike. “We are proud to be developing leading technologies that help to better service our sites and customers, whilst also considering and managing our impact on the environment.”

Their ESG (Environmental Social Governance) action program is used to create value whilst managing risk, rather than it being a compliance tool.

Flexiss currently employs 35 staff across the current 9 stores, with the team anticipated to expand to be more than 50 strong by late 2021.

Mike said, “As the Flexiss group continues to grow, there is one thing that will never change and that is our belief that our team are our most important and valuable asset. The team is the driving force behind our success and looking after their wellbeing will always be our priority.”

The current SureStore portfolio spans nearly 400,000sqft, with this planned to increase to over a million sq ft in the next 12 twelve months.

Mike and Andy attribute SureStore’s success, to several factors: the flexibility of the product; structural changes in the retail market caused by online businesses; the lack of housing supply and people wanting to speed up the moving process by storing their belongings while their house is on the market. Clearly, COVID has also had a positive impact on the industry as a whole.

There’s still more to come in the next few years with the aim of adding a further 5 to 10 stores per year to the Flexiss management group.



New SSA UK Board Members

In what is a sign of a strong industry and Association, this year there were 7 nominations for 4 positions on the SSA UK Board. Hence, an election was held for the 2 independent positions and one general position with the major operator’s position being elected uncontested.

Congratulations to our newest SSA UK Board members.



Emma Chesterton-Kay

Emma has worked in the self storage industry since 2003, initially as a Store Manager in London for Access Self Storage, before moving into Property and Development. Emma moved to Safestore as

Acquisitions Manager in 2008 followed by Storage King in 2011 where she has been the Head of UK Property for over ten years. Prior to joining the self storage industry, Emma spent most of her time in the air teaching Air Cadets to fly motor gliders and achieved her Private Pilots Licence in 2001.



Adrian Lee

Adrian has over 22 years’ experience in the self storage industry and is the Operations Director of Big Yellow Self Storage. Adrian is a RICS qualified Chartered Surveyor and was previously

a Director of Edge Properties PLC – a developer of big box retail assets. Adrian was previously an SSA UK Board Member between 2008 and 2014.



Ali Goodwin

Ali is the Manager of Clear Storage Limited, a family run single site container storage facility based in Hereford. They started the business 6 years ago and have grown to become Herefordshire’s

largest storage facility. Ali previously practiced as a solicitor for 20 years and became Partner in a top 100 law firm.



Alex Henney

Alex has 8 years of experience in the self storage industry as an owner and operator of Squab Storage which has a growing number of locations based across the Midlands.

Prior to his involvement at Squab, Alex spent almost 20 years working within the banking sector at firms such as JPMorgan, Citigroup and Credit Suisse.



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Resignations - Debunking the Myths

Aaron Heslop – Rooks Rider Solicitors

On 19 July (so called 'Freedom Day') the government revoked its nationwide 'work from home if you can' order. However, the government did not positively order employees back to the office, it left it up to employers to decide when and how their employees could safely return (if at all).

In some cases this has led to employers completely remodelling their workforce structures. For example, some employers have continued with their workforce working full time from home, some have even embraced 'work from anywhere' policies, with employees working abroad. For the majority of employers across the UK, a hybrid model has been adopted with employees working half the week at home and the other half in the office, leading to greater employee satisfaction.

However, there are also many employers that have failed to embrace the new normal working practices, coupled with many employees that do not want to return to the office, which is leading to a wave of resignations across the country. Some of the myths around resignations are debunked below:

A resignation must be given in writing

A common misconception is that a resignation must be given in writing by an employee for it to be valid. In fact, the reason a resignation is given in writing is because the employment contract requires it. If there is no clause requiring a written resignation, then a resignation from employment may be given orally and would be effective.

An employer can simply not accept a resignation and it will not be effective

A resignation is a unilateral act by the employee. Whether the employer accepts it or not does not matter. The resignation would remain effective. However, it is generally

advisable for an employer to write to the employee and acknowledge the resignation as it gives the employer an opportunity to clarify leaving arrangements, notice periods and any other relevant post-termination terms such as confidentiality.

An employee can withdraw their resignation

Once a resignation has been served by the employee on the employer it cannot be withdrawn by the employee (except in limited circumstances). An employer may decide

to continue to employ the employee if it wishes, but technically the employee would be powerless to withdraw their resignation.

An employer can place the employee on garden leave once they have resigned

An employer cannot do this as a matter of course and will only be able to do so if the employment contract permits it. If there is not a garden leave clause in the contract and the employer places the employee on garden leave, it would be doing so in breach of contract. This would mean that the employer would not then be able to assert other terms of the contract which might be important to it post-termination such as confidentiality and non-solicitation of clients and contacts. This

could be a costly error to make in relation to sales staff who may have good relationships with the employers clients, who would then be free to contact and poach those clients after they resign.

An employee who simply stops coming to work has effectively resigned

In these circumstances the employee has neither resigned nor has the employer terminated their contract. The employee is in breach of contract by not reporting for work and would technically be treated as if they had dismissed themselves, called a 'self-dismissal'. In doing so, they would normally forgo their right to receive a notice payment.

“ some employers have continued with their workforce working full time from home, some have even embraced 'work from anywhere' policies ”

Suppliers Spotlight - Access Control, Security Systems, Padlocks & Security Hardware

Security is important in any business, but it is possibly one of the most important factors when running a self storage business. Customers trust self storage businesses to store their goods securely and safely for the duration of their stay. Without adequate access control processes and security, businesses open themselves up to potential criminals and putting the customers' goods at risk. Two areas we can look at when discussing security, is the access control and security systems the facility have in place, and then the padlocks and security hardware the customer chooses to use when securing their individual unit.

Access Control and Security Systems

Access control and the security systems a self storage facility has in place will depend on many factors. Some may have simple alarm systems which are activated when the building is locked up at night, and customers only have access when a staff member is on site. Others offer 24-hour or out of hours access and will need an access control system so customer access when staff are not on site can be monitored and controlled. This could be a control into the building, or section of the building, only, or could include individual unit alarms as well as building access. These could be controlled using fobs provided by the storage facility, pin code access or Bluetooth controlled by the customer's mobile phone.

If you are unsure of which system would be a best fit for your business, contact the suppliers of these systems and discuss them in more detail – details of our supplier members can be found below.

Padlocks and Security Hardware

Part of signing up a customer for a new unit, is explaining the importance of security to them, and as well as access control to their unit, part of this conversation should be around how important it is for them to secure the unit, to be careful with pin codes/ fobs and who they allow access to.

Many self storage businesses ask the customer to provide their own padlocks to secure the unit, and with limited choice available to customers in other retail establishments, it is always wise to provide the customer with information and the option to buy an adequate padlock from yourselves. Not only does this help the customer from having to look elsewhere or buying a padlock which is inadequate in the security it offers, there may also be the option to make a small profit as well and can be a product stocked in your shop alongside boxes, and packaging supplies.

While it is not advised from the SSA UK to hold keys for a customer's unit for legal reasons (see the Manual of Advice & Procedures for more information), some self storage businesses decide to provide locks for the units, that the customer must return after their stay. This may allow self storage operators to ensure an adequate lock is used to secure the unit and may be in the form of barrel locks embedded in the doors, or even Bluetooth locks as part of the doors.

Regardless of if you are wanting padlocks or other security hardware, again, our suppliers listed below are the best place to look at options and ask any questions.



<https://storage.bearbox.co.uk/>



<https://www.chateauproducts.com/>



<https://www.dsoc.uk/>

KINNOVIS

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<https://opentechalliance.com/>



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<https://sensorberg.com/>



<https://www.scsolutions.eu/>



<https://www.sentinel-systems.com/>



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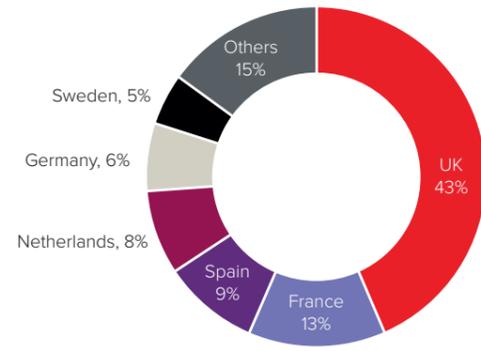
FEDESSA Annual Industry Report

This year's FEDESSA industry report produced in conjunction with JLL will be released at the FEDESSA Conference & Trade Show 2021 in Birmingham on 20 September. It reports on how the industry has performed during the COVID-19 pandemic and overall, the results are very positive. Following is a sneak peak at a few of the items covered in the report.

Growth of the industry

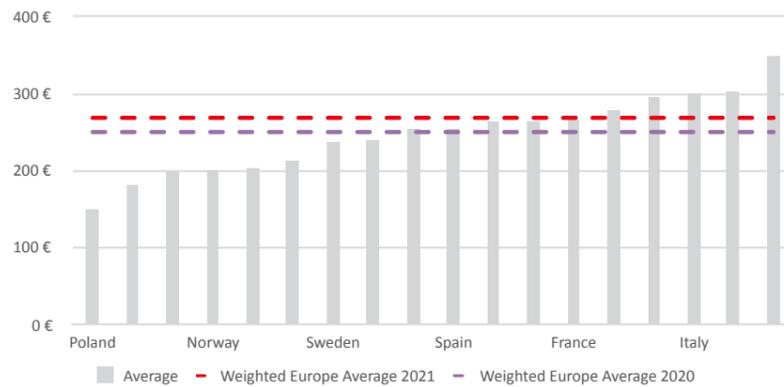
The industry in Europe continued to grow throughout the pandemic with an estimated 340 new stores opened since the last report. While the industry continues to grow in the major markets like the UK, France and the Netherlands, other European countries and emerging European markets like Portugal and Poland are growing at a rapid rate. The top 6 countries account for around 84% of the storage space in Europe.

Top 6 Countries market share by floor space

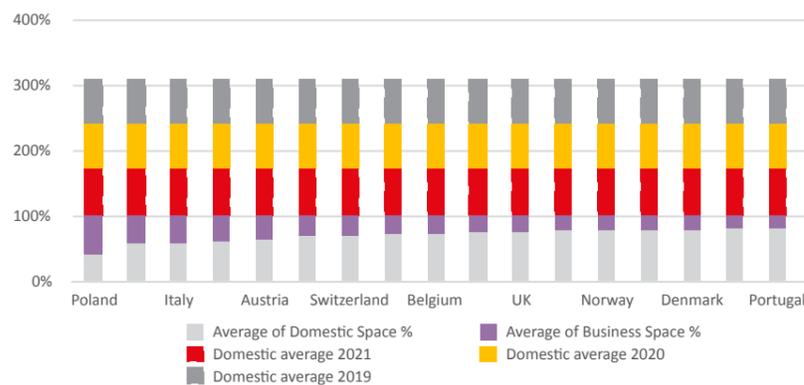


Revenue earned from storage space has grown at an unprecedented rate. Up 7.5% from last year to €268.74 per square meter, per year excluding VAT. All markets experienced growth in revenue per square meter, with Switzerland retaining the highest levels. The UK has experienced above average growth in revenue, moving from the 6th highest last year to second this year, although currency conversion does also influence the UK results. Italy also showed significant growth in revenue. Spain has shown less growth, moving from second highest last year to 9th this year.

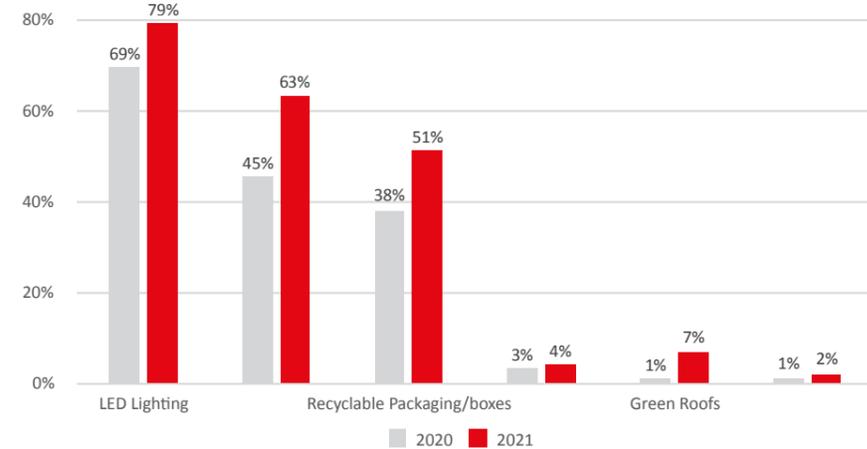
Revenue per sqm excl VAT



The level of business customers using self storage decreased by a percentage point in the last 12 months to 21.8%. However, the percentage of space taken by business customers dropped much more significantly to 27% from 32% last year. This is the largest change we have seen of this metric since the survey began. This could be because of businesses downsizing or examining their expenses during the pandemic, resulting in taking less space. It could also be that as stores fill-up they reconfigure extra large units, typically taken by businesses into smaller units with higher yield per square meter.



The survey measures a number of ways in which the industry is taking on green initiatives. The future impact of environmental sustainability on the industry is examined in detail within the report. As the chart below shows, the industry has decreased its impact on the environment in several ways. LED lighting is now used by almost 80% of stores. Green roofs have also had significant growth. As such roofs are more difficult to retrofit, it is likely that a significant percentage of new stores are now putting this initiative in place.



The full report has much more detail on the industry including more country specific data and a profile on other global markets. An analysis will be provided by JLL and FEDESSA at the FEDESSA Conference & Trade Show in Birmingham prior to the report being released on 21 September.

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The FEDESSA Conference is back and ready for you to network with hundreds of other self storage owners, operators, suppliers and investors. Everything needed for a self storage business, all in one place!

This is the 22nd European Self Storage Conference and for 2021 and we are back in the UK at the refurbished Hilton Birmingham Metropole at the NEC, Birmingham.

The conference offers yet another superb line-up including well known business speakers as well as industry experts providing valuable business improving topics including:

- Digital marketing super session
- Top tips for operating self storage
- Automation in self storage
- How to surprise delight and excite your customers
- Setting up and expanding your container store
- Jaw dropping marketing for self storage
- How listening makes you a better negotiator
- Making self storage green and profitable
- Future container prices and supply
- Results of the Annual Industry Report 2020

A major highlight of the event is the Trade Show

This is the biggest self storage trade show outside the USA with an impressive range of industry suppliers ready to showcase their products and services including, container suppliers, management companies, suppliers of lifts, insurance providers, packaging companies, security system providers, construction companies, auctioneers and many more. Exhibitors include:



All relevant to self storage, these experts from a wide range of companies will demonstrate the very best of what they do across the two days to deliver an eye-opening trade show experience.



Mark Durden-Smith
Conference Host



Nicholas Wheeler OBE
Charles Tyrwhitt



Sony Kapoor
Economist



Geoff Ram
OMG Marketing



Richard Mullender
Communications
Expert



Mark Oursin
Shurgard Self Storage



Rennie Schafer
FEDESSA & SSA UK



Tim Stocks
James Stocks & Co



Terry Bagley
Janus International



Allan Agerskov
Pelican Self Storage



Christel Land
Clover 4



Matthew Lilley
Legal & General



Fred de Ryckman de Betz
Attic Self Storage



George Matts
Loc-Box
Self Storage

Monday, 20 September 2021

08.30 – **Breakfast in the Trade Show**
09.30 Monarch Suite

09.30 – **Welcome**
09.45 Kings Suite

08.30 – **How to surprise delight and excite your customers**
09.30 Nick Wheeler OBE - Charles Tyrwhitt

10.30 – **Industry Report Launch**
11.00 Ollie Saunders – JLL & Rennie Schafer,
FEDESSA & SSA UK

11.00 – **Morning Coffee & Networking in the Trade Show**
11.30

11.30 – **Container Breakout Stream - Setting up and Expanding your Container Store**
11.55 Library Suite

11.55 – **Container Breakout Stream - Future Container Prices and Supply**
12.20 Library Suite

12.20 – **Container Breakout Stream – Technology for Unmanned Container Stores**
12.45 Library Suite

11.30 – **Capital Access for Self Storage - A European Dimension**
12.00 Tim Stocks – James Stocks & Co

12.00 – **Making Self Storage Green and Profitable**
12.45 Industry Panel Session - Sustainability

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12.45 – **Lunch & Networking in the Trade Show**
14.45 Monarch Suite

13.45 – **Specialist Groups**
14.45 Library Suite

14.45 – **Automation in Self Storage**
15.15 Industry Panel Session - Automation

15.15 – **Top Tips for Operating Self Storage**
16.00 Industry Panel Session – Operational

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16.00 – **Afternoon Tea & Networking in the Trade Show**
16.30 Monarch Suite

16.30 – **Jaw-dropping Marketing for Self Storage**
17.30 Geoff Ram – OMG Marketing

18.00 – **Drinks in the Trade Show**
18.45 Monarch Suite

19.00 – **Networking Dinner – Warwick Castle**
22.30

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Tuesday, 21 September 2021

08.00 – **Breakfast in the Trade Show**
08.50 Monarch Suite

08.50 – **Welcome**
09.00 Kings Suite

09.00 – **How Listening Makes you a Better Negotiator**
09.45 Richard Mullender - Communications Expert

09.45 – **International Developments in Self Storage**
10.30

10.30 – **Morning Coffee & Networking in the Trade Show**
11.00 Monarch Suite

11.00 – **Future Changes to Society and how this will impact Self Storage**
11.45 Industry Panel Session – Futures

11.45 – **Digital Marketing Super Session**
12.45 Industry Panel Session – Digital Marketing

12.45 – **Lunch & Networking in the Trade Show**
14.30 Monarch Suite

14.30 – **Running Europe's largest Self Storage Company**
15.15 Marc Oursin - Shurgard

15.15 – **Navigating through the ongoing economic uncertainty**
16.00 Sony Kapoor - Economist

16.00 – **Closing Session**
16.15 Rennie Schafer, CEO FEDESSA & SSA UK

19.00 – **Awards Dinner Drinks**
19.30 Kings Suite

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19.30 – **Awards Dinner**
23.30 Kings Suite

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CBRE



Dave Davies
Double D Consulting



Ollie Saunders
JLL



Ben Hook
Storist



Chris Bryan
blue self storage



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Colin Jermonson
Janus
International Europe



Gabriella Zepf
Big Yellow



Gavin Shields
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Emma Banks
Squab Group



Jes Johansen
Store Friendly



Simon Galway
CBRE



Terry Doman
Storage King UK



Sarah Manning
Secure Stores
Nationwide

Specialist Groups

Alongside the main plenary sessions we have 7 specialist groups where you can delve into more detail on important topics with a range of industry experts, in a small group environment.

UK Legal

Led by James John, Rooks Rider Solicitors & Rennie Schafer, FEDESSA & SSA UK

Selling to Millennials

Led by Paul Whittaker & Anthony Adams, Young Storage Network (YSN)

Container Operations

Led by Maarten Streppel, USC

Going Green

Led by Ollie Saunders, JLL

Digital Marketing

Led by Christel Land, Clover 4

Automation

Led by Paul Shepherd, Janus

Operational Skills

Led by Dave Davies, Double D Consulting

Container Park

Also new for 2021 is our exciting on-site Container Park located opposite the entrance to the dedicated conference centre where the event is being held.

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Social Events

Networking Dinner – Warwick Castle

Monday, 20 September

Networking Dinner Sponsored by 



Annual Industry Awards Dinner

Tuesday, 21 September

Awards Dinner Sponsored by  Drinks Reception Sponsored by 



Despite the recent restrictions imposed by the pandemic, FEDESSA are expecting yet another great turn-out this year and are looking forward to meeting everyone in-person again.

BOOK NOW!!

Bookings for the FEDESSA Conference & Trade Show 2021 are online - Visit: www.fedessa.org for further information and to book your place



Paola Locatelli - 20 Years at EasyBox

'Team' not 'Location, Location, Location' is the secret of EasyBox's success as Paola, its first employee, celebrates 20 years in the company.

EasyBox was formed in 1999 and opened its first store in the East of Milan in 2001, at which time its first team member Paola Locatelli joined the company. Paola is now celebrating 20 years with the company and still manages the same 7,000 sqm store today.

EasyBox Director Paul Fahey said "Paola is a far cry from just a store manager, helping the senior management team with many central and company administrative functions over the years and is a wonderful example to all our newer team members. She has always been on call 24/7 for any emergency that has occurred, not only in her store, but any of the Milan stores we operate.

Whilst Paola is the longest serving of our team members, in fact, 10 of our team have now been with the company for an average of 15 years (perhaps a unique statistic in the European industry) and Paola together with these highly experienced

team members form the backbone of the company and have made an unquantifiable contribution to Easybox's success over the years.

We are fortunate to have some of the top self storage locations in Milan, Rome, Turin, Genoa and shortly Florence, but as a company, we consider the dedication, loyalty, experience, skills, and attributes of our 'Team' and not 'Location, Location, Location' are the key to our unique success in becoming the largest self storage operator in Italy, both by area (600,000 sq ft NLA) and revenue.

Historically the influence of Italian store managers on the success of a store has been far more important than store managers generally in the European industry today, due to one unique Italian factor. This being the Italian cash paying economy, leading to store manager's monthly face-to-face engagement with nearly all store customers, due to the vast majority paying monthly bills by cash instore.

Today generally in the industry we see our customers



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Whilst celebrating the 20th anniversary of joining EasyBox, Paola has been reminiscing about her 20 years in self-storage, with customers experiencing many different emotions

on move in and move out and don't get the opportunity to develop a close relationship with them as Paola and our team did so well in the past."

Paul explains "I joined EasyBox 9 years ago and at the time, 85% of customers still paid in cash with the majority not possessing a bank or credit card. Only in the last 3 years with the growth of online shopping and travel bookings, is Italy now more in line with other countries with increased card use and automated monthly payments now being the norm."

Whilst celebrating the 20th anniversary of joining EasyBox, Paola has been reminiscing about her 20 years in self-storage, with customers experiencing many different emotions. On the romantic side she remembers a young couple using one of the units in her store for regular 'liaisons' whilst another customer regularly entered the facility as a man and exited as a lady, before returning later to change again.

On a sad note, she has experienced supporting many customers through difficult times and in some cases, they had lost all in their lives other than the contents of their unit and adopted Paola as a friend they could trust and feel safe with.

One young woman who became close to Paola used the store as she was

escaping from her violent partner. When a man who had 3 units for many years in Paola's store died, the contents were found to be just old newspapers and magazines of no value.

Paola has also had the pleasure of dealing with many internationally famous actors, sports people, musicians, and other famous customers over the years, but she remembers most vividly her dealings with helping the police and public authorities to arrest many people who used her store for drugs, fake money, or goods such as bags, clothes, shoes, or stolen goods such as expensive art.

Paola recalls that only two years ago one of her colleagues in Turin assisted the Carabinieri with the arrest of a customer storing gold bars and cash to the value of 1.3m Euros!

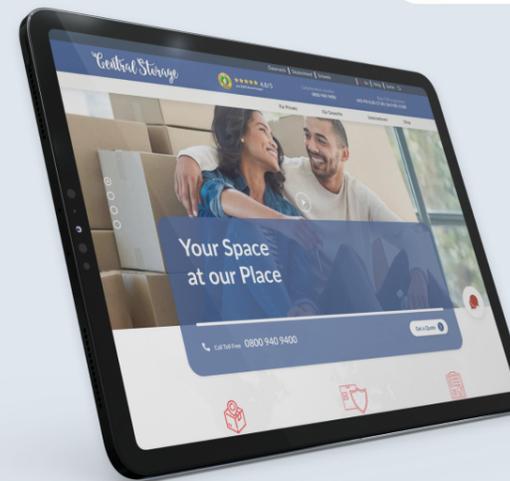


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Norway - Second Space

Since May this year, Second Space is a new player in the Norwegian self storage market. The driving force behind the company, Isak Larsson, is however, no stranger to most of us.

Isak started his career in the industry in 2004 as an Assistant Site Manager in City Self Storage and worked his way up over the years. In 2011, he became General Manager for City Self Storage Norway and extended his responsibility to Sweden in 2013 and Denmark in 2017. He has also been a Board member of the Danish and Swedish self storage Associations and currently he is the Chairman of the Norwegian self storage association.

At an unexpected moment he got invited by the co-founder and previous chairman of Self Storage Group ASA, Martin Nes for a coffee. Martin represented Fernclyff, an Oslo based investment company that was the majority owner of Self Storage Group until they sold their shares in January 2020. During the talk it was obvious that they shared the same views and that was the beginning of Second Space. "I felt very privileged when I got the opportunity to start something from scratch, a company with no legacy and the possibility to choose the best solutions for both customers and the company", said Isak.

From the moment it was clear they would start Second Space, they created a team that worked really hard to open the first facilities in a very short time. In the beginning of May they opened three facilities, two in Oslo and one in Tromsø in the north of Norway. In total they have bought 13 properties they can convert to self storage but there is still some work to be done. They will run two different concepts, namely compact sites in central parts of the cities and mega sites located with high visibility alongside main roads just outside city centers. All in all, they now have approx. 70,000 square meters of storage space.

In the first phase, all their facilities will start off with between 100-300 units per site to get the sale going. This gives them the opportunity to adjust the sizes depending on the demand. In some locations they will of course have larger units for business customers. Their sites are mainly located in residential areas, while some sites are in areas that are both residential and businesses.

The company name is simple, but very original, because it clearly describes the meaning of self storage for customers. They had many names on the table but wanted a name that said something about them and their product – sort of a promise to the customer. And the company name says it all. Second Space should be the customers second "home" which is also why they strive to deliver the best quality and make it easier for their customers to rent and use their storage spaces. So, location, quality and easy use is their main advantage.

Their system allows customers to book, sign and pay in only two minutes. In these steps the customer chooses the right size, the system runs a credit check, customers signs with Bank ID (e-signature) and pays by card or Vipps (a mobile pay solution). The final step is giving the customer access to the storage via a digital key/app. "All our stores are unmanned, we believe that the best service we can provide the customer is a system that allows the customer to book when it suits them and not when it suits the company. We now have move-ins while sleeping at night and that is fantastic", explained Isak.

This year they will have full focus on Norway. As mentioned above, they have 13 properties currently where three are already partly fitted out. Second Space plan to open at least 12 facilities in total this year. There are definitely other markets that are interesting, but first they want to establish a solid foundation in the major cities of Norway.

With a dream team of four, they see a bright future and they plan to continue as a small organisation, as automatization is what it is all about.



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Self Storage in Belgium and the Netherlands

It is clear the COVID-19 pandemic has been a significant shock to us on many levels and we are all dreaming of getting our lives back to normal. It has been a year of lockdown, loss, and uncertainty, and let us be clear, it will most likely be very difficult to get back to our old way of living.

Economical impact of the COVID Virus in Belgium and the Netherlands

According to the latest forecast report from the Belgian national bank (NBB), the Belgian economy is returning to pre-corona virus pandemic levels, which is more than half a year earlier than expected. For this year, the NBB expects economic growth of 4.7 percent, which is partly due to the progress of the vaccination campaign, which allows for a gradual relaxation of restrictive measures. It is two percentage points more than the previous forecast at the beginning of this year. For 2022, the National Bank assumes growth of 3.3 percent growth and 1.6 percent in 2023. The Dutch economy is projected to grow by 2.7% in 2021 and 3.7% in 2022. Consumption will drive the recovery as households normalise their saving after the sharp increase in savings in 2020. Private investment will improve but continue to be held back by underlying uncertainty. Bankruptcies are expected to rise, and unemployment is set to peak in the second half of 2021 following the phasing out of government support measures. Businesses and workers were able to adapt swiftly by relying more on teleworking, click-and-collect and home delivery. In both countries, the labour market is however coming out of the crisis almost unscathed.

Real estate market

Given the pandemic, the steep house price increases seen in both Belgium and the Netherlands in 2020 were a surprise. House price growth was unexpectedly strong in 2020 in Belgium. The reason behind the strong

growth could be found after the income support provided by the government, the increased activity by investors and the low interest rates. Looking at 2021, it is expected that the upward pressure from these factors will fade, leading to a more modest growth. The Dutch housing market is still showing strength despite the crisis. Stable affordability, increased activity by investors and further tightening of the housing market explain why prices have on average increased by 7.8% on an annual basis (vs. +6.9% in 2019). The pace of economic recovery and developments in confidence in the housing market and interest rates will largely determine the impact of the crisis on the housing market in 2021.

Self Storage in Belgium and the Netherlands

In both countries self storage was introduced in the late 1990s. The first storage facility in Belgium was opened by Shurgard Self Storage, the largest operator in Europe. For a long time, they have been the only professional provider in Belgium, but in recent years, more and more professional self storage companies are entering the market as concept awareness is growing and more people are finding their way to storage. The Belgian self storage market counts 90 facilities of which 53 (representing 11 operators) are members of the Belgian Self Storage Association.

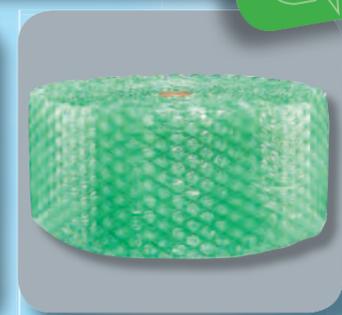
According to the latest FEDESSA Report, the Netherlands with 322 facilities are one of the top six by number of facilities. Of these, owners of 122 facilities are member of the Netherlands Self Storage Association.

Compared to other countries, the self storage sector in Belgium and the Netherlands has not been very active in looking at new, innovative solutions. One of the newcomers to the Belgian market Storo realised there was a need for advanced solutions and opened their first fully digitalized self storage company one month before the lockdown and a few months later, opened their second facility. Another



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new member of the Belgian Self Storage Association, Selfstore also recently opened a fully digitally controlled self storage facility in the Antwerp region.

Especially now with the pandemic, innovation has become more important so we can engage digitally. We buy so many things online so we should also be able to book storage space online. Our way of life, purchasing, communicating; all changes at a rapid pace.

However, not only operators are focusing a lot of attention on the digital aspect. There is also a great deal of interest from investors abroad in both markets. In August 2019, the companies Safestore and Carlyle's Joint Venture acquired the M3 Self Storage portfolio in Netherlands. Almost one year later they entered the Belgian self storage market with the acquisition of a six-store portfolio in Brussels (2), Liege (2), Charleroi and Nivelles. The company, Lokabox has a total of 20,600 sqm of lettable space. The acquisition of Lokabox represents an excellent platform for entry into the attractive Belgian self storage market and a logical next step in the growing joint venture with Carlyle Europe Realty. The same joint venture acquired in December last year, Opslag XL, a three-property self storage portfolio in the Netherlands. The purchase has 6,968 square meters across two freehold locations in the Hague and Hilversum regions and one short leasehold in Amsterdam. They are planning to continue to expand its footprint by investing in further development and acquisition opportunities in self storage across Europe.

In the Netherlands, Europa Storage Group, a subsidiary of Volta Global, acquired in December 2019 1Box Self Storage, comprising 8,800 sqm. At the same time, the company which now included 13 stabilised properties, opened two new stores after a year. In 2020, they completed the acquisition of their second European self storage portfolio through the purchase of StorageBox. The portfolio comprises four facilities located in the Limburg region of the Netherlands, and totals over 3,200 lettable square meters. The newly acquired portfolio will be re-branded and fully integrated into the existing 1Box Self Storage brand. They plan to expand throughout the Benelux region over the coming years and is also looking actively to expand heavily throughout the European market.

In the spotlight – KUBOX, new NSSA member

Kubox opened their first facility in 2000 on the Ceintuurbaan in Rotterdam. Over the years they acquired a further three stores and opened a new facility in 2015, which brought the company to a portfolio of five stores, mainly centered in the Randstad. Since 2018, they have offered storage space to both residential and businesses through two services. The first is the traditional self storage service and the second is self storage at home. Kubox is the strongest provider in the Netherlands in this service and it is a service that is growing fast. The principle is simple; a customer orders Kubox storage box(s) online and these are placed at the door wherever and whenever the customer wants. The customer loads the contents and the Kubox(s) is picked up, stored and returned to the (often new) location precisely when the customer wishes. Besides these two services, Kubox also offers other services like Kubox Premium, Kubox Movingservices, Kubox Postalbox, Kubox packaging and Kubox insurance.

Kubox strives to be a quality provider offering their customer the best service and the most convenience. Kubox changes storage to a need-to-have with the slogan 'More space in your home and head. Kubox gives you space!' This is based on the brand values of:

- Unburden. Everything to offer the customer 'space in the head'.
- Convenience. Renting at Kubox is fast, easy and safe. From booking to access and settlement.
- Reliable. Kubox is a traditional Dutch company with a heritage of 21 years and super safe buildings.
- Progressive. Both the services and the resources are innovative and automated where possible. Everything to make the process as efficient and customer friendly as possible.

Kubox has defined a 3-5 year plan that focuses on a new positioning and further expansion. They will continue to focus on their brand awareness and want to position themselves as the best provider, not always as the cheapest. Their goal is to open five new self storage facilities and to expand their self storage services at home.



A conversation with Philippe Peyrot from Annexx in France

How did you first get involved in self storage Philippe?

My background was real estate as a land developer. Then in the mid 90's I created an online game, one of the first internet-based games. This led to a job with EA in the USA for the next 3 years as online producer. After this I was in the USA looking for some good ideas to bring back to France. I had seen self storage all over America and even though I had not used it then, I thought it would be an idea that would work well in France. I had the real estate 'know-how' to acquire the property, but I needed some partners to help me with the operations. My friend Vincent had recently sold his business to Danone, so we worked together along with some other investors to start our self storage business in France and opened our first store in July 2003.

How have you seen the industry change during your self storage journey?

When we started there were some big players in France, like Shurgard and Une Pièce en Plus with Safestore in the UK. They were all trying to grow their portfolios, predominately in the Paris area, but there were very few smaller operators like there were in the USA and UK at the time. But now the major operators' share of the market is shrinking as more and more independents open stores all over France. We now have close to 1000 stores in France and only around a third of them would be owned or operated by the major companies, while it would have been over 80% when we started.

A lot of this growth is from people that have buildings or real estate that they have limited use for, so they think

they will turn it into self storage. This is a less strategic approach than we take to developing new stores. A lot of the growth from the independents is outside the major cities, but for example in Toulouse, there are now around 22 self-storage stores of which 4 are ours. This growth can cause some short term over supply, but then demand increases and it balances out again.

How have your stores changed from the first one you opened to your latest?

I don't think we have seen much fundamental change in self storage over the last 20 years. The external facades



Self storage benefits from change, whether that is a good change or a bad change, in terms of economy or social situation it is still change which is good for us



of the buildings are nicer, we have more automation of access control, LED lights and the like, but the concept and general building layouts are the same. If you look at one of our first stores and one that has just opened, you won't see a big difference. This is another great thing about self storage, if you build a good store to start with, it will last a long time and does not need updating or refreshing like other properties do.

What do you think are the key reasons self storage has shown to be so resilient to economic and political changes?

Self storage benefits from change, whether that is a good change or a bad change, in terms of economy or social situation it is still change which is good for us. When people have changes in their life it creates demand for the product. It seems like there are lots of changes happening in France and all over the world, at the moment and that is good for self storage.



Annexx has stores almost all over France now, do you see regional differences in the market?

We do see some small regional differences across France, so we use local people to help deliver marketing in each area. This helps with local nuances, someone in Lyon for Lyon rather than someone from Toulouse in Lyon. But the core messages, artwork and the like remain the same across the country. The reason people use self storage are largely the same across the country.

Are you considering expanding outside France?

France is really our focus. We would not say definitely not outside France, if the right opportunity arose then we would consider it, but our growth plan is within France. We think there is still opportunity here to build new stores and demand for the product is still increasing. We are at our core a real estate company, so we want to own our assets rather than offer a franchise-style model. We also have real estate assets like offices, industrial parks, or retail parks that we keep developing.

What do you think the Annexx portfolio will look like in 5 years?

We have 24 stores open now and I think we can grow to

30 – 35 in 5 years. Ultimately, we want to get to 50 stores in France. One or two new stores a year is the pace of growth we are looking at. We have generally achieved this historically and see no reason why it cannot continue.

What did you find the biggest challenges during the COVID-19 crisis?

The biggest issue we had was collecting cash. We have stores in the northern part of Paris where a third of customers pay cash. It is just how it is there. They pay cash for everything. This was obviously an issue during the pandemic when we could not meet to accept cash or get to the banks to deposit cash. We also had to rely more on our call centre and change the way we manned the stores. We had very few people moving in or out during the lockdowns and the number of commercial companies having deliveries dropped. This meant we did not need as many staff in store which made it easier to manage.

What is your expectation for the industry as we come out of the COVID-19 crisis?

I don't think we will see a major drop in enquiries. I think there will continue to be growth as there are more changes to people's lives. If we were going to see a big impact on this industry, we would have seen it by now. The figures for 2021 so far have been strong, we are in a much better place than I thought we would be at the start of 2020 when the pandemic first hit. There has been so much government support given out during the crisis I think the recovery will be quick.

What are your thoughts on fully automated sites?

There is a large range of automation options in self storage. There are fully unmanned stores but also self-service options in stores and online. There is also

automation in terms of online communications, sending of invoices, chasing payments, marketing and so on. There is automation in yield management with dynamic pricing and online direct payment methods. We are unlikely to have a fully automated unmanned store, but we will be using automation to improve the efficiency of our current systems. The French market is quite behind other European countries in terms of allowing customers to complete the entire booking process online.

I don't think big stores will be fully automated, particularly those that have large numbers of commercial customers with deliveries. It is an option for smaller sites, but you need to also manage security. Automation does open up options for downtown areas where there is limited real estate for large stores. So, there is definitely a future for a fully automated facility that is all based through interaction with your mobile phone.

What do you think will be the challenges and opportunities for the industry in the coming few years?

The biggest risk is regulatory risk, which you are never sure when or how it will come. We saw this after the fires in Hong Kong. But the immediate challenge is finding suitable property for development, especially in Paris. The

question is can we take a secondary location and rely on online marketing instead of high-profile sites?

Currently, France does not have a lot of pressure to comply with environmentally sustainable building practices, but this will come. We are already looking at what we can do, green roofs, solar cells and the like. We are doing more in terms of insulation in our new stores to reduce energy usage and, of course, using LED lights, motion detectors etc. It is only a matter of time before the construction process itself will also have to be more sustainable and we need to prepare for that.



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New Portuguese Facility - Securum Self Storage Lda

On July 5, Ulf and Maria Christiansson (both from Sweden) opened Securum Self Storage in Algarve.

Securum Self Storage is in a key location and business hub area, very close to the highway, the local train station, and within 5 minutes of Vilamoura, Almancil and Loulé. The size of the building is around 1,000 sqm with 240 units, all located inside. "It is a modern building with a unique style, looking almost like a spaceship", explains Ulf Christiansson.

This store is their flagship as their head office is also in the building and this will be the only store with a reception and manned.

Their plan is to build more stores in this region, which will be unmanned thanks to the Noké system and have already started investigating where they could locate the new stores. "We are the first facility to have the Noké system in the Iberian Peninsula and that is for sure the future for self storage. We were expecting some difficulties to explain the benefits to our clients of the Noké system, but so far all of them are 'all in' and find the system very convenient", said Maria. "Our next development will be to expand our webpage to make it possible for our clients to create and sign their contracts online, and also for them to make payments", Maria continued.

Ulf has a background of more than 30 years in the property business in Sweden. Maria has more than 20 years in logistics in Sweden and Denmark, but the last 12, before moving to Portugal, she spent in the property business. Throughout the years they



have been in contact with self storage but never took the step into it. They watched self storage from the sidelines for many years. According to Ulf, the main difference between the commercial property business and self storage is the number of clients per square meter.

Securum believe the biggest challenge for the industry in the coming years will be the location - companies need to be closer to their customers. The other challenge is to keep up automation such as handling payments more efficiently and offering contract signing digitally, etc. The Noké system, is the first level to make things easier for their clients.

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24Storage increases its focus on sustainability and PROPTECH through solar cells

The new storage facility in Högsbo is not only packed with IoT technology for remote operation and energy optimisation, now it is also equipped with a solar cell plant for further autonomous operation and sustainability focus. The project is carried out with the Swedish solar energy group Soltech Energy Sweden AB. 24Storage are incredibly proud to be involved in their first solar project. Green energy solutions are fully in line with the ambition to develop smart and sustainable properties that promote both people's everyday lives and the environment. The solar cell plant will be a milestone to create properties that fit well into the city of the future, and 24Storage is looking forward to doing this with Soltech. "This is just the beginning of our investment in solar energy" said Fredrik Sandelin, CEO of 24Storage.

Link to the article: <https://24storage.se/pressmeddelanden/24storage-okar-sitt-fokus-pa-hallbarhet-och-prop-tech-genom-solceller>



Shurgard is Team Rynkeby National Team Sponsors

Team Rynkeby is a charity cycling team raising money for organisations that support children with critical diseases in Denmark, Sweden, Norway, Finland, the Faroe Islands, and Iceland. The organisation consists of 2,100 cyclists and 550 volunteers. Every summer they cycle to Paris to raise money through sponsorship. In 2020, Team Rynkeby donated 90.5 million SEK to various organisations, such as the Swedish Childhood Cancer Fund.

Shurgard has signed a National Team sponsorship contract with the organisation in Sweden and Denmark, providing free storage space in eight different locations. Team Rynkeby is using the units to store sponsor material and giveaways.

On top of the free storage space, the Shurgard teams in Sweden and Denmark have collectively completed 6,420 kilometres during their Fundraising Step Challenge. Together they raised €1,400 for Team Rynkeby!

Link article: www.shurgard.se/en/about-us/team-rynkeby

And for some long-awaited news.....

We are delighted to announce Bryony Pearson at the SSA UK is expecting her first baby. Due in January 2022, Bryony is currently 20 weeks pregnant, in the process of buying her next home as well and is very much looking forward to this next chapter for the family. At the time this went to print, it is still unknown whether it is a little girl or a little boy, but Bryony, not being one for surprises, should be finding out soon.

"Danny my husband and I, are both excited about the new addition to our family. Currently, there are two of us plus a dog called Albert and two cats, Lily and James. We are feeling incredibly lucky and blessed at the moment - if not a little busy with all the preparations!" said Bryony.



Collaboration between Storo and Dockx car rental

Dockx car rental opened a new Pick-up Point in the Storo parking in Brecht. Customers can rent a moving van here ranging from a Mega Van (10.50 m³) to an Easy Box (19.10m³). You do not need to be a Storo customer to use this service. Via the Dockx app you can do this yourself. With the help of a digital key, you can pick up your vehicle 24/7 at this Dockx Pick-up Point. In other words, through this Pick-up Point, the entire rental process is completely digital and contactless. Anyone who has reserved a storage space at Storo can now easily reserve a moving van.

Mark Durden-Smith Interviews SSA UK & FEDESSA CEO, Rennie Schafer

In a one-off, summertime special, the August CEO Update Webinar was a little different with Rennie Schafer being interviewed by Mark Durden-Smith, host of the forthcoming FEDESSA Conference & Trade Show in September, about all things self storage and about Rennie himself. Delegates were given the opportunity to pose any questions (yes, any questions!) they wished to Rennie who gave a fascinating insight into his background and his thoughts on the future of the industry. He stood up very well to Mark's probing! However, if you missed it, login to the members' only area of the SSA UK website to download and watch the recording.



ALLSAFE Mini Storage will provide storage spaces with 41,250 solar panels

ALLSAFE Mini Storage will have 77,000 square meters of roof space covered with a total of 42,250 solar panels. The solar panels are distributed to various locations of the company in the Netherlands. ALLSAFE, the oldest storage rental company in the Netherlands, has now successfully applied for a subsidy for several locations through the SDE++ scheme. The company wants both existing and new facilities to be more sustainable. Installation of solar panels is part of a comprehensive sustainability plan. "In recent years, we have already taken significant steps in the field of sustainability, and we will continue to focus heavily on it in the coming years", explains Eric Stubbé, CEO of All Safe Storage. "We use every measure to do business as sustainably as possible".

<https://solarmagazine.nl/nieuws-zonne-energie/i24742/allsafe-mini-opslag-gaat-opslagruimtes-voorzien-van-41-250-zonnepanelen>

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Don't miss...



Colin Jeromson
Managing Director
Janus International Europe
speaking at the panel discussion
'Making self storage green and profitable'



Terry Bagley
President Industry & Partner
Relationships, Janus International
speaking at the panel discussion
'Automation in self storage'



New Website for the AESS

Since March 2021, the AESS has put a great deal of effort into improving its communications to be closer to members. When COVID-19 broke out, the Association quickly realised it would not be easy to see each other in person for a long time, so monthly webinars related to the international industry were launched. This was however, only a first step and AESS continued to further improve its communication plan.

One of the latest outcomes has been a new website which the Spanish Self Storage Association launched in June. It is hoped the website will encourage new operators to join, and partners should now find more frequently updated online support from the Association.

The website has a public area and one that is dedicated only for members. In the public area there is information about the Association including the code of ethics all members need to follow and an overview of upcoming events.

Additionally, there is also a self storage store locator of associated storage rooms, and a calendar where you can find not only events organised by the AESS, but also events organised by other associations and suppliers.

In the members only area, you will find regulations and laws, useful information for members, access to webinars, reports, magazines, and publications and even recordings from past AESS Congresses plus direct access to all its active networks. Visit www.aesstrasteros.es/



The UK Crack down on criminals who target self storage

The Intellectual Property Office (IPO), National Trading Standards, London Trading Standards and the Self Storage Association UK (SSA UK), teamed up recently to launch a new code of practice in the UK to reduce the appeal of self storage facilities for criminals who deal in counterfeit and other illicit goods. The Tick Box: Keep it Real Keep it Legal' code of practice sets out simple procedures aimed at preventing the fraudulent storage of counterfeit and other illicit or unsafe goods, while helping self storage facility owners be sure of who is really using their premises.

“Unsafe and illicit goods, such as counterfeits, create real social and environmental harms in our communities and criminals have used self storage units as part of their activities. Self storage providers signing up to the code of practice will now have absolute confidence they are doing everything possible to deter criminals who target them in this way, while reassuring legitimate customers that their belongings are in safe hands.” Said IPO CEO, Tim Moss. “I am delighted that the new code of practice is being co-delivered through an effective partnership between self storage providers, government and local enforcement, complementing our comprehensive approach to disrupting IP crime.”

Forty-five local and national UK self storage providers have already signed up to the first phase of the code of practice, which has seen over 1,200 self storage facility staff receive additional training under the scheme.

The scheme is already yielding results, with targeted enforcement action disrupting criminal networks with the seizure of thousands of counterfeit items, estimated to be worth millions of pounds to criminals.

Lord Toby Harris, Chair, National Trading Standards, said “Trading Standards officers are finding counterfeit goods in, or on route to, self storage facilities. By supporting self storage facilities to prevent the storage of illicit goods on their premises, we can help clamp down on the sale of counterfeit goods that continue to deceive consumers and undermine legitimate businesses. We encourage all responsible self storage providers to sign up to the Tick Box scheme – it’s free to join and easy to implement and will provide peace of mind to facility owners about what is being stored on their premises.”

Sign up by visiting <https://tick-box.org.uk/>

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Managing customers when there is no space left

With the industry receiving record levels of enquiries and occupancy rates climbing, many businesses are in the enviable position of having limited, or sometimes no units, available to sell to customers. This can produce its own problems and needs to be managed carefully to avoid ongoing reputational damage to your business.

If you are approaching maximum occupancy, which is generally over 90% and when you no longer have units of a certain size to sell, the first thing you should be looking at is your pricing. Particularly, the pricing of existing customers. If you have new customers waiting on units willing to pay full price for a unit, and you have existing customers that are on a lower rate, then it's time to start moving those prices up, especially if they are well below the current prices. If the customer moves out, then you know you can replace them with a full paying customer. If you are full, then your competitors are also probably close to full so there is likely to be less options for customers to move regardless. Also consider your discounting policies. If you have very few units to sell, then do you need to be offering up front discounts to encourage customers, especially if you have a waiting list? You will not be full forever. Soon enough you will either increase your supply or demand will fall slightly, so make the most of the opportunity while you can.

Examine your marketing budget. If you have limited product to sell, then should you be spending as much on AdWords or other marketing campaigns. There is little point in paying for customers to come to your website if when they get there, they find you have no units available for them. You don't necessarily want to stop marketing all together as you still want to reinforce your brand, and some customers research self storage long before they use it. You should however look at ways you can reduce your spend. It is a great opportunity to experiment with your marketing, make changes and see what impact that has on enquiry levels. If they drop off drastically then you can go back, without having a major impact on your business. You may find that you can improve the efficiency of your online marketing for the long term.

If you do find yourself completely sold out of a certain unit size, then it is important to manage customer's expectations. You may be able to offer them a larger unit but be careful. If these are also getting full you don't want to discount the larger unit when a full paying customer could take it. Make sure you are not allowing people to reserve or book a unit online that you cannot provide. This is a sure way

to upset your customers, particularly if they turn up on site only to be told that you have no units. Some businesses let customers book a unit online and then contact them to say it's not available and try and negotiate another solution. This is also likely to upset the customer, these days if people shop online and the website says stock is available, they expect it to be available. Customers are not going to be happy if you then contact them to say, there is no stock. A better solution would be to change the website to state we have limited stock of these units so please contact us immediately to ensure you can secure the unit you need. This makes it clear to the customer they do not have a unit on hold but encourages them to contact you so you can try and sort a solution or put them on a waiting list.

If you do set up a waiting list, ensure you keep communicating with the customers on the list. Every week or so give them an update on the status of their unit and check they still need it. Even if you have no news, it is good to keep in touch with the customer, so they know you have not forgotten about them. Don't tell them you have a unit until you are sure that it will be available. You might say we expect to have a unit for you by this time, but you will confirm closer to the date. But don't make promises you can't keep. Remember customers do not always move out on the day they say they will and sometimes units need to be cleaned or repaired between uses. It is much better to allow yourself a couple of days leeway than to call the customer and say, "sorry your unit is not ready after all". Much better to be able to call them a day or so early and say, "If you want to, you can actually move in early." A couple of days rent is a small price to pay for a satisfied customer.

While you want to make sure you are communicating with your customers and keeping them happy, you also don't want to let them take advantage of the situation. You have a waiting list for a reason. If the person on the top of the list is not sure, or wants to wait a couple of weeks, then simply say if they do not take the unit straight away it will have to be released to the next customer and they will be notified when the next unit becomes available. If they really want the unit, they can pay for it now and leave it empty until they are ready to move in. You don't want to be too hard line and some allowances can be made to give people a chance to organise their things, but at the very least, the customer should be giving you a firm move in date and paying for the first month now to secure the unit. No more holding units for free when you have no availability!

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Aged under 40? – you are the future of this industry!

(Aged over 40, please do not be offended, it is your time right now – get busy doing!)

Great, that has weeded out all the older readers, it is just us now. Let's talk about the **Young Storage Network**.

Have you thought about the future? Not sci-fi, talking to your Hoover, printing food, flying cars, future. No. I mean your future in self storage. Well, if you have not - let me paint you a picture. Imagine you got that next sale, you made another customer happy, you got that promotion, you got that bonus, you got that pay rise, you are really happy and...

...back to reality please. What I am suggesting is that your future in this industry is something just a few steps away from where you are now, you control it, and you can make it happen.

But, you ask, "how can I make sure it happens?"...sorry I only have 500 words. But I do know that you have a better chance if you join a group of like-minded people, who discuss, learn, innovate, solve problems and generally have a good time together.

The Young Storage Network is a place (soon to be an in-person place!) where you can see the faces of these like-minded people. Where you can chat with a great group of people at all different stages of their self storage careers. These people are happy to help, happy to teach and happy to share... I can tell that you are about to become one of them.

If you have read this far then well done, if you want to know more then join the Young Storage Network now.

The next meeting is scheduled for: 24 August. Become a YSN member now, it is free and will only take up as much time as you want it to – join now by emailing hspeed@ssauk.com for an application form.

The YSN offers you:

- A space to meet others in the industry
- A fresh perspective on your (self storage related) problems
- A network of like-minded people to learn from and share with
- YSN Accreditation (Coming Soon)

Join **NOW** to be part of that. Do not miss out. You will be 40 sooner than you think.

Tom Lampard - Director of Acquisitions – Lok'nStore Age 39



Sell self storage on 'what it means' to the customer

In the Wolf of Wall Street movie, Leonardo DiCaprio asks his friends to "sell me this pen". While one of them tries to tell him how good the pen is, the other tells him all the great things he will be able to do with the pen. It's all about selling the benefits to the customer not the product itself. In self storage terms, this means less about doors and security and more about creating space for life changing moments.

Far too often self storage websites and marketing materials are full of pictures of storage units, doors, buildings, security cameras and the like. While clearly these items are important, are they really what the customer is interested in, and will they make you stand out from your competition? Customers expect your business to be secure, clean and units to have doors on them. It's a bit like a grocer saying 'our fruit won't be rotten', or an airline saying 'we will take off and land safely'. Your marketing materials should be focusing on how your customers benefit from using self storage and what makes your store different.

When customers are surveyed on why they chose their self storage business, location unsurprisingly comes out the clear winner. So clearly stating the location of your business is important. Staff interaction or customer service comes in second, followed by cleanliness and access hours and finally, security. This reinforces the fact that customers take security as a given, but select a store based on the service they will receive. So, you should be focusing on this in your marketing material and website.

Self storage is all about people going through life changing moments. People are storing items that have personal importance to them. Your marketing materials should be focusing on the personal side of self storage. Use images of people using their storage units for different needs, accompanied by customer quotes saying how self storage helped them out. Talk about how your staff are always on

hand to help customers and the range of unit sizes available means you will have a solution to their needs even if they need more, or less space, or their needs change over time.

Use your website to become more than just a provider of storage, but a business that helps local people through life changing moments. Create dedicated pages on areas such as moving house, having a baby or a death in the family, where you provide tips to help people through these challenges. Provide links to other community-based groups and resources. Obviously, also talk about how self storage can help, but make the pages a real resource for customers. This will show customers that you really are helping them and reflects the personal side of your business. It will also help with your google ranking as you are providing resources on more than just storage. So, if someone local searches for tips on moving house, then you have a better chance of coming up in the results. This can help attract customers to your business that may not even be considering self storage.

Remember, self storage is a local business so engage with customers at a local level and consider how you can reflect this in your marketing material. If your store is near a local landmark then talk about this for example, 'just down the road from the football ground'. Comment on local activities in your social media posts, whether it's roadworks on nearby roads, progress of the local sports team or new stores opening in town. Also think about the reasons people use self storage. If you hear about a new mothers' club, then promote this and link in the ways self storage can create room at home for new babies. Talk about how your staff are part of the local community and highlight their achievements. Engage with people in your community so when they have a need for self storage, they think of you!

NEXT YOUNG STORAGE NETWORK MEETING

TUESDAY 24 AUGUST

Join now to meet your industry colleagues and hear from interesting speakers about things that matter to you.



Emma Banks joins the YSN Board

Emma joined Squab Group in 2019 as Store Manager. She had previously worked for just over two years at Space Station Self-Storage in Kings Heath as Duty Manager. She is now the Group Sales Manager for all sites in the Squab business. Emma has demonstrated herself as a social media whizz with helping stores to gain new custom through her social media posts. She has also provided support for other companies with Sitelink training.

Interview



Francesca Damiano
Casaforte

How and why did you first get into self storage?

I entered the self storage industry in 2016, after meeting Cesare Carcano, founder of Casaforte. I started working with him and slowly our collaboration became closer and closer and today I am working full-time for his company.

What has been the biggest change in the industry since you started?

I once said to Cesare: in the past we sold a product, then we started selling a service, now we are more and more expected to sell an experience. I believe that this has been the development of this sector.

What do you like most about the self storage industry?

I just like the fact that the idea behind self storage is very basic. I find it brilliant, in its simplicity. In my opinion every idea can become brilliant when the concept is basic and when it works in a business environment. Self storage is a simple concept that lends itself to many evolutions and could really become the commodity of the future.

What do you like least about the self storage industry?

In Italy, there is still little knowledge of the service, so there is very little clarity in understanding its potential and understanding its real value... but we are working on it!

What is your favourite book or movie?

There is no specific one... or rather there are several depending on the periods of my life. In the past I loved very visionary movies such as Blade Runner, Vanilla Sky, or more inspirational as Gandhi, The Fleeting Moment, or Good Will Hunting. Among those that have remained in my heart because I found them really innovative, I would mention Sin City and Mother!. More recently, I really enjoyed La grande bellezza by Sorrentino. I could go on and on and I would certainly forget the best. For books, I would say that in my opinion and should never be missing in the library of any, authors such as: G. Orwell, A. Huxley, N. Chomsky and E. Bernays.

If you had a time machine, where would you go?

To be a "tourist" in the future, I am curious to see what awaits us. If I had access to the "button rooms" I would go back to the early 1900.

I think industry associations like the Italian Self Storage Association are important because?

I think they are fundamental for anyone working in the sector because they increase the knowledge of business dynamics and create fundamental interconnections. In addition, a business that grows with a strong sector association behind it, has more weight also to make its voice heard towards local and national institutions and administrations.

Right now, I would rather be?

Younger (she laughs).

What life advice would you give a younger version of yourself?

Perfectly learn at least three foreign languages and travel as much as you can.

I would really like to have dinner with?

Do not ask me why, but I would tell you Elton John. And then waiting for the baronet to accept my invitation I have to quote one of his famous verses:

"This is a long old road, We shouldn't have to walk alone

But if you find the right companion, You won't feel so worn out when you've grown..."

And this brings me back to the Association, to give me the opportunity to thank Rennie and Paola for the incredible work they are doing in our wonderful FEDESSA Association and all the professionals who are spending time in it and have believed in it from the beginning. I could not imagine a better company with which to grow together!

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The Circular Economy: An Interesting Opportunity for Self Storage

If the world keeps going along its current trajectory, by 2050 we will be consuming three times more resources than our planet can sustain. A whopping 92% of the world's resources are only used once and in a single product, before it becomes waste. Whilst opinions about the urgency of specific environmental challenges like climate change or biodiversity can differ, there is no doubt amongst scientists that something has to change. And the sooner the better.

One of the most interesting approaches to this challenge is what has become known as the circular economy. This phrase is sometimes equated to waste management and recycling, but it is about much more than that.

The circular economy can best be described with the phrase "what comes around goes around". It is about approaching the economy and in particularly manufacturing in a way where the lifetime of products is increased. This can be achieved by reusing, repurposing and recycling of course. But it can also be achieved through repairs. Imagine if the next washing machine or dryer you buy is designed to last you for at least 10 years and if it breaks, there are certified technicians in your area who can repair it for you. Those are the types of shifts and approaches that the circular economy offers us. It is in many ways an approach that seeks to maintain our current standard of living, but simply make it sustainable.

Whilst micro-initiatives like local clothes swapping events or community book sharing boxes have made the headlines, some of the world's household brands have embraced the idea as well. IKEA has started a circular scheme, where they offer to buy back customers' old furniture at up to 50%

of its original value. In exchange, the customer receives IKEA vouchers to buy new furniture with. The old furniture gets sold at a profit by IKEA. This concept was launched in Stockholm, Sweden and was scheduled to be introduced to the UK, just as covid restrictions started arriving, so the launch was delayed for that reason.

The shoe brand Thousand Fell already produces shoes from sustainable materials but have launched a scheme similar to IKEA's, where customers can return old shoes and receive vouchers towards buying new pairs of shoes.

Adidas has gone even further. They have created a line of sports shoes which you never own; once you are done using them, you simply return them to Adidas. "If the end can become the beginning, we can help keep products in play and waste out of landfill", the company said at the launch of the UltraBoost DNA Loop trainer.

There is a myriad of examples of companies and even countries planning a shift to a more circular economy. The question we should be asking ourselves is then of course, how does this fit in to the development of the self-storage market?

It is hard to see anything but opportunity for our industry. If the linear and disposable economy is shifting, both businesses and private consumers will be more likely to hold on to their possessions rather than throwing them out. And in doing so, they will inevitably need a place to store them if there are items that aren't needed for a period of time.

Whether it's second-hand shops or businesses who offer recycling schemes to their customers, we should expect a growth in businesses who will need storage for the

products their customers return. We should also expect a growth in businesses who need drop-off stations for those products. The opportunities almost seem endless.

Perhaps the only risk of the circular economy is if we are too slow to become part of the solution. Too slow in communicating to our surroundings how perfectly self storage fits into a more sustainable approach to consumption. The good news is that the world won't change overnight. So, you can start thinking and strategizing already now.

What opportunities are there in your local area to make yourself visible to the growing circular economy? Which other businesses represent possible strategic partnerships in that process? What kind of micro-initiatives can you be part of already now? By following this shift, which will only grow stronger over time, we can put ourselves front and center in the conversation. We can show how self storage is a fundamental part of creating an economy that is both expandable and sustainable at the same time.



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US Association holds first in person conference since pandemic

The Self Storage Association (United States) was among the first trade groups in the U.S. to return to an in-person conference following the COVID-19 period. From June 2nd-4th more than 1,500 self storage professionals gathered at the Nashville, Tennessee event for what was billed as a “Back in the Saddle” gathering. The conference was delayed nearly 3 months from its original planned launch date due to pandemic restrictions, but it still attracted similar delegate numbers to previous Spring SSA events.

“We didn’t know what to expect, but our members demonstrated remarkable confidence in returning just as health and safety restrictions were relaxed,” said SSA President & CEO Tim Dietz. “We wound up with our second largest Spring Conference in our 46-year history.”

With most COVID restrictions relaxed, delegates were free to explore the trade show and sessions without the requirement to socially distance, but were asked to be respectful of their fellow delegates. Masks were optional inside the trade show and sessions room. The main impact was that large groups were not allowed to gather for drinks and dinner. The SSA overcame this by holding a series of smaller dinners in a range of restaurants and bars in Nashville on the same night. This allowed delegates to continue the networking relationships created during the day and enjoy a drink with fellow members they had not seen in-person for some time.

Headlining the event was Joe Margolis, CEO of Extra Space Self Storage, which operates 1,800 self storage properties in the U.S. The tradeshow attracted more than 150 exhibitors eager to offer their products and services to the industry stateside. As in Europe, the self storage sector in the USA has enjoyed tremendous performance



compared to other real estate sectors during and following the pandemic.

The U.S. Self Storage Association holds two national conferences annually, with its Las Vegas fall conference scheduled for September 7th-10th. The SSA also manages 21 state self storage Associations which have begun scheduling in-person events.



Chilean self storage market

The self storage market in South America had a late start compared to Europe and the US. The major players in Chile is Aki KB Minibodegas. Arie Rezepka, founder and CEO of Aki KB opened its first facility in South America in 2003 in Chile, a decade earlier than the major Brazilian player GoodStorage in 2013. The South American self storage industry is mainly concentrated in Brazil, which has half of the subcontinent population (215 mio of 423 mio inhabitants). Chile has the second biggest offer of leasable sqm, despite being one of the smallest populated countries in the region. However also in other countries like Colombia, Argentina and Peru self storage facilities are entering the market.

As in most parts of the world you would find the first self storage facilities on industrial sites, but rapidly more and more operators have started to build their facilities in inner-cities once the local regulation and developing cost makes it possible. The strategy of developing self storage facilities in the city centers or residential neighborhoods is more and more integrated in South America. In the case of Argentina, despite not having brand new facilities, they are restructuring existing buildings to have facilities closer to its clients.

In Santiago you will still see a lot of major self storage facilities being build at industrial areas, near to the city. However, lately, we see that more and more major players are building facilities in the city center or even in high-income neighborhoods. This has mainly been made possible by Aki KBs who started to build facilities in city centers awchich paved the way for the rest of the players in the market.

	Sq.m ^[1] (thousands)	Population (millions)	Sq.m per Capita ^[2]	GDP per Capita (thousands)
Argentina	62.3	44.94	0.0014	20.3
Brazil	605.0	215.63	0.0028	15.2
Chile	239.6	19.11	0.0125	24.9
Colombia	74.1	50.35	0.0015	15.6
Peru	9.3	32.51	0.0003	13.0
Subtotal Latin America	990.3	362.54	0.0027	16.2
USA	176,384.8	332.36	0.5307	68.3
Europe^[2]	10,469.2	641.30	0.0163	49.5

^[1] Leasable Area ^[2] By April 2021 ^[3] Only Fedessa members by 2020

Self storage market in Chile

In Chile, like most countries in South America (with the exception of Brazil), the market concentrates on its capital. Santiago congregate about 37% of the country's population (7 mio of 19 mio inhabitants). Today there are 70 storage facilities in Chile, with the three largest providers holding approx. 54 percent of the market. Clients come in all shapes and sizes, from individuals to local businesses, and though their reasons vary, they are all in need of the same product; space to store their belongings at a reasonable price. Santiago's local market mostly concentrates on few players and is mainly led by Aki KB Minibodegas, which provides over 25% of the total leasable area of the city.

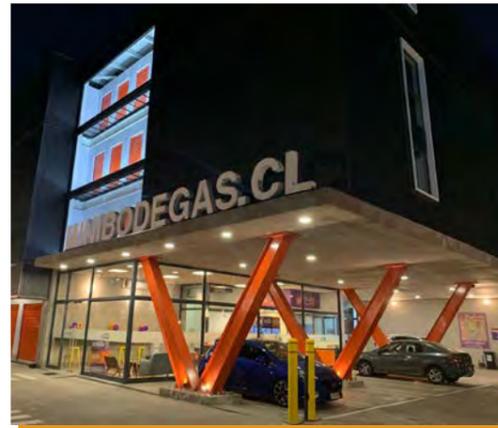
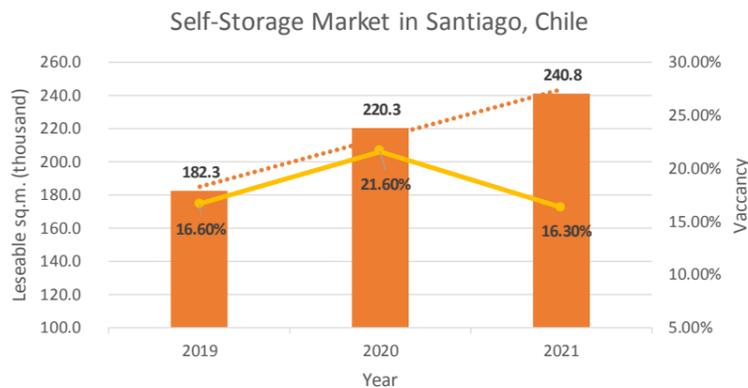
As in other self storage markets, the Chilean industry faces many challenges. First, there is no legal framework to protect operators from delinquent tenants. Second, developers face construction regulations designed for commercial and residential real estate, and lastly they are forced to go through a qualification process each time a project is presented to

the corresponding authorities.

Aki KB business intelligence department records over the last three years a CAGR (compound annual growth rate) of around 10% in the Chilean self storage industry, mostly boosted main player developments and enabled by the entrance of several real estate investments.

Over the last few years the number of the self storage facilities have multiplied in Santiago. By 2021, Santiago's self storage industry maintains a positive performance, as the vacancy rate has maintained a lowering trend for its third year in a row, reaching the lowest level with a 16% vacancy. These great sector indicators would be explained by the significant increase in small companies as self storage customers, especially after the Covid-19 pandemic.

Despite the complexity provided by the Covid-19 pandemic, we expect the entry of 12,200 sqm of new Gross Lettable Area (GLA), which translates into a 4% growth in the total GLA during the past six months. The industry is expected to continue to grow as at least 12 future projects have been identified. This will increase the sector growth GLA of 22% by 2024.



Aki KB La Reina

The sustained growth in the supply of self storage and the local market's continuous absorption speaks about an unsatisfied demand for the product in Santiago. As most of the new-world countries have their population concentrated in one city, Chile makes it easy for investors to focus on some strategic points and avoid desegregating its portfolio on several locations, allowing several savings due to the concentration of facilities in only one big city.

E-Commerce impact on the self storage industry

The Covid-19 pandemic has brought a lot of changes in global consumer behavior. All digital industries, including education, entertainment, and especially electronic commerce, which, in Latin America grew by 8.5% and reached over US\$ 200 Bn in value, represents the second-largest expansion of the sector globally, according to the Beyond Borders 2020/2021 study, launched recently by EBANX, an international financial group based in Brazil.

In Chile's specific case, the study detailed that the e-commerce market would exceed US\$ 10 Bn in 2021, with one of the largest accelerations among the four nations analyzed. Meanwhile, by 2023, it is expected to double its current size.



Arie Rezepka, Founder and CEO of Aki KB

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Country	Total Sales (US M)	Population (M)
Chile	8,700	19
Brazil	103,700	211
Colombia	13,300	50

Country	Jan-20	Dec-20	Growth
Chile	57%	61%	4%
Brazil	49%	61%	12%
Colombia	43%	55%	12%



Aki KB La Dehesa

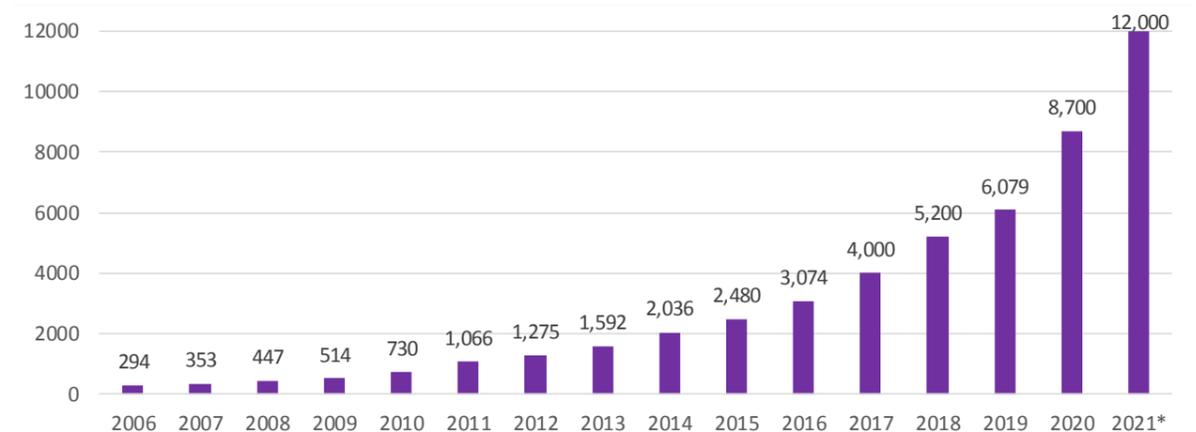


Figure 1: E-Commerce Sales (USD M) evolution in Chile

As the leader of the Chilean industry, Aki KB notes the sector has benefited from e-commerce emergence in South America through platforms, which allowed the small business to have easy access to its client base. The demand from small businesses for self storage units are mostly because a self storage facility provides a really good answer for small businesses that do not need much storage space, like small importers. Therefore, the new outlook shown by the Covid-19 pandemic put the local industry in good shape in terms of the demand for the product over the next years as e-commerce changes the South-American retail foundation.



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