



Self Storage Europe

Volume 1, 2014

Results of the FEDESSA European Survey 2013

EU seals agreement on
audit sector shake-up

Company Features

City Self-Storage:
a 20-year adventure

Locker Locker

You You Space
Self Storage

Australian Association

Spanish Conference

Canadian Association

Japanese Association

Asian Self Storage Expo

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Tim Ryman, Owner

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Welcome

Message from Christian Schmutz the President of the Federation of European Self Storage Associations (FEDESSA).



May I first wish everyone who reads this magazine a happy, successful and productive 2014.

My year has already started well for me and I am extremely proud to find myself now undertaking the role of FEDESSA's President for the next two years. Not only is it a great honour but, much more importantly, I believe we, as an industry, will soon find ourselves on another growth spurt as the world and Europe move forwards economically again. Opportunities should abound and I look forward, with FEDESSA, in helping you all to take advantage of them.

This year FEDESSA celebrates its 10th birthday, without doubt a significant moment in our short life to date. While records are a little difficult to come by, it is probable that the size of the industry in Europe has trebled in that 10 year period. The founding associations were France, Germany, Italy, The Netherlands and the United Kingdom. Today there are 14 member associations with Belgium, the Czech Republic, Denmark, Finland, Ireland, Norway, Spain, Sweden and Switzerland joining. We also have contact and growing influence with operators in all other European countries where self storage is taking place. Today there are over 2,000 facilities in Europe – large and small – and we calculate that there are over 750,000 families/businesses using our product. We are therefore a significant industry and business with growing duties of care to our companies and our customers.

During our first decade we have built up a network based on and in many ways coordinated by Rodney Walker and the UK's association (including European conferences and the FREE quarterly magazine Focus) and we have managed, when required, to put together rapid responses to any threat we have seen on the horizon. That said, most of the issues have been at national level where national associations or groups of

operators have dealt with these issues. The industry's European self storage standard, EN 15696, which was ably constructed and manoeuvred through the complex European processes by members of FEDESSA, is now in its second 5-year period. This serves as a protection against intruding industries and regulators and also as a benchmark for the standard we expect of all the facilities in the industry, both members and non-members. I encourage you all to strive to meet the standard and indeed to do better as this will help to safeguard our industry, wherever it is positioned in Europe, going into the future.

At the 10-year point the General Assembly has agreed that we should review the roles and objectives of FEDESSA so that we can ensure that we are giving the best possible support as a Federation to current and new national associations and to all the companies, both self storage providers and suppliers to the industry. Our work has started. We have already accepted that we must continue the watching brief, along with the possibility of lobbying, we have other issues which may appear both in the European Commission and at national government level, and that we must improve inter-association communication. Furthermore we are now looking at how we can make FEDESSA more supportive of national associations and therefore of more value to their members. Our 2013 Survey, reported on elsewhere in this magazine, is a major step forward in our work and we hope of use to you all. Again we wish to build on this and our corporate knowledge of the industry across our huge region.

In closing I would like to thank the FEDESSA team for all its efforts over the years and I look forward to taking the next steps in building your national associations, increasing the numbers of members and encouraging our excellent industry as FEDESSA undertakes its second decade.

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Front Cover Image

Promotional photo from City Self Storage taken as part of series of photos portraying the many uses for self storage

We are always looking for quality photos of self storage businesses across Europe, so if you have photos of your facility that we can use in Focus and other publications please send them to admin@ssauk.com

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Results of the FEDESSA European Survey 2013



Rodney Walker

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

Chart 1
FEDESSA Survey Results 2013

	%age Purpose Built (P) or Conversion (C)	Current Net rentable m ²	Fully built Net rentable m ²	%age Office Yes (Y) or No (N)	%age Shop Yes (Y) or No (N)	% domestic to business customers (eg 70:30)	% domestic to business customers by space (e.g. 60:40)	%age Fire Detection? Y or N	%age Sprinklers? Y or N	%age CCTV Y or N?	%age Electronic Access control Y or N	%age Individual Unit Alarm Y or N	Do you provide insurance? Y or N %age	Est total no of facilities
Belgium	71P	5580	5580	100Y	100Y	70:30	59:41	100Y	5Y	100Y	100Y	100N	100Y	29
Czech Republic	66C	3374	3374	100Y	100Y	72:28		100Y	100N	100Y	100Y	100Y	100Y	3
Denmark	63C	4,088	4,211	100Y	100Y	90:10	82:18	100Y	100N	100Y	100Y	14Y	100Y	85
Finland	94C			28Y	28Y		77:23	84Y	25Y	100Y	100Y	100N	100Y	85
France	46P	3,804	3,804	100Y	100Y	83:17	73:27	100Y	4Y	100Y	100Y	100N	100Y	245
Germany	72P	3,899	5,010	100Y	100Y	76:24	73:27	100Y	100N	100Y	100Y	50:50	94Y	86
Netherlands	60P	4,501	4,673	77Y	97Y	77:23	71:29	99Y	18Y	100Y	100Y	19Y	94Y	264
Ireland														25
Italy	100C	4,534	4,989	39Y	97Y	62:38	46:54	100Y	7Y	100Y	100Y	100Y	100Y	45
Norway	100C	2,278	2,808	84Y	84Y		82:18	100Y	43Y	100Y	100Y	63Y	74Y	36
Poland	100P	2,525	2,525	50:50	100Y	61:39	59:41	100Y	110N	100Y	100Y	100Y	100Y	6
Spain	89C	3,176	3,722	100Y	96Y	76:24	72:28	99Y	21Y	99Y	98Y	88Y	100Y	167
Sweden	67P	3,961	4,053	98Y	98Y	81:19	75:25	96Y	2Y	92Y	100Y	14Y	100Y	90
Switzerland	100C	2,803	3,020	83Y	83Y	82:18	73:27	92Y	21Y	100Y	98Y	71Y	100Y	15
UK	30P	3,900	4,200	100Y	100Y		58:42	90Y	97N	100Y	95Y	45Y	98Y	830
Others														52
Euro Average less UK	40P	3,367	4,310				71:29							
Euro average	35P	3,490	4,152				64:36							
Total no in Europe														2063

Survey results

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

The estimated size of the European Industry

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

the industry) and thirdly, as the effectiveness of the estimation of the numbers will vary between countries. Nevertheless the resulting figures, for the first time, give us a reasonable baseline to build on.

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

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

Chart 2
Estimated Size as at 15/12/2013

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

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A Word From Downunder!



Luisa Natoli

Membership Services Officer at
the Self Storage Association of
Australasia

FEDESSA recently had the opportunity to catch up with Luisa Natoli, Membership Services Officer at the Self Storage Association of Australasia.

Luisa had just returned from an SSAA Regional Dinner in Perth which was held on 14th November and, by all accounts, turned out to be a very successful event.

As Luisa put it, "Despite the heat, the members were enthusiastic and engaged in communication with friends, colleagues and each other. A great night made all the better by an extremely well organised staff team at the 150 East Riverside Bar Restaurant in Ascot."

Adding, "Visy Boxes & More generously sponsored the drinks and contributed to the light-heartedness of the evening by providing bottles of wine in a 'self storage giveaway' with four lucky winners."

The programme allowed for 'Service Members' who attended to have the opportunity to introduce themselves and their services to the members. An informal evening then followed, capped off by a report on the figures in the Urbis 2013 Demand Study, a professional survey programme commissioned by SSAA.

In general, it seems that members overall are still quite focused on their value added services and building up their cash flow around these services. Members are thinking more and more about such opportunities these days – money making ideas such as merchandise, insurance, trailer hire, truck hire, receive and dispatch services and which strategic partnerships will work.

A welcome and positive trend seems to be emerging from the Service Members of the SSAA with many becoming increasingly interested in participating with the Association and its members.

Those members that have been loyal for a few years now are expressing desire to be pro-active in utilising their relationship with the Association to better communicate with its members in one way or another.

Luisa commented, "We definitely encourage Service Members to cultivate this relationship and whether they think creatively, strategically or are results focussed, we appreciate their support."

Continuing, "The first part of the year for me, was primarily focused on delivering the first ever Association Summit which took place on Hayman Island. A fabulous location, great cuisine and everything running smoothly contributed to delegates having an extremely worthwhile and enjoyable time at the Summit. Many delegates have spoken to me about the intimate setting being the catalyst for more enduring friendships formed and stimulating conversations with people and personalities of the industry. Mother Nature certainly helped out and we enjoyed weather of

approximately 26°C daily which was the perfect backdrop for the relaxed and non-corporate agenda which included speaker sessions, service expo, an amazing race, a golf competition plus an awards dinner".

SSAA recently hosted a LinkedIn and Facebook Workshop for members in Victoria which was exceptionally well received. The Workshop assisted members in learning about how these social media platforms could help target email campaigns, drive business their way and stand out in the community.

SSAA also hosted a networking dinner in the same region with over 80 members in attendance who enjoyed some great food and drinks well into the evening, engaging in stimulating self storage conversation and hijinks.

In the coming months SSAA will be focussing attention on introducing their SSAA website which will not only benefit the association's internal operation work but also make life easier for their members – especially when wanting to change their details or access important SSAA resources.

The logistics and
challenges faced when
conducting a major event
on an island are many,
but the rewards
are fruitful.



8th Annual Spanish Self Storage Conference & Trade Show

One hundred professionals from the self storage sector met in Barcelona on 14th November 2013 for the 8th Spanish Self Storage Conference and Trade Show, organised by AESSE (The Spanish Self Storage Association). Rodney Walker also attended the conference, representing FEDESSA, the European Federation of Self Storage Associations, as Secretary General.

The General Assembly meeting took place in the morning, during which Joaquín Izquierdo of "Bluespace" passed over the responsibilities as President of AESSE to Alberto Borregón of "Minialmacenes y Trasteros". Joaquín also summarised the work being undertaken at present and the association's plans for next year, in particular, "SEO-SEM (Search Engine Optimisation and Search Engine Marketing) positioning", and "Unfair competition".

Lluís Pons, Director of marketing for "Vueling" then presented some of the key factors relating to organisation and profitable growth in the airline business. He explained some of the strategies of the company and the different actions carried out in the past that have allowed "Vueling" to become one of the top national and European airlines.

A session on SEO-SEM positioning, was presented by Matías Viale, co-founder of "Emexs". Matías gave some suggestions on how to improve search positioning, as well as some guidelines

for SEO-SEM balance.

The new law about payments, introduced in 2013, was the next theme which was covered by Antonia Lucena, senior consultant of "Brachfield & Morosólogos partners".

In the trade exhibition hall, attendees were able to visit the stands of numerous providers; insurance, software, construction material, packaging, safety...(Radical Systems, Steel Storage Europe, Ferrer and Ojeda, Capsa, Space For You, PTI Security Systems Europe, SC Solutions, Cavale Steel and Janus International).

In the afternoon, representatives from two small companies, "Las Cosas en su Sitio" and "Arbis Box", shared their particular experiences with the audience. They highlighted the difficulties in obtaining activity licenses for sites in residential areas in Madrid and the need to diversify business

after some 20 years in the archives storage sector, as a result of the fall in public procurement business.

"Unfair competition" was the last topic. Lawyer Ignacio Barroso, explained the action lines that AESSE could follow in relation to the growing problem of companies advocating a similar service but not meeting the recognised professional service levels for the self storage industry.

Operators and suppliers, national and international and investors interested in the industry shared their knowledge and experiences during a very successful day.



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A Busy Year for the Canadian Self Storage Association



Robert Madsen

Director at the Canadian Self Storage Association

The Canadian Self Storage Association kept extremely busy throughout 2013 and is ambitious to do more in 2014.

Robert Madsen, Director at the Canadian Self Storage Association kindly summed up some of the key activities.

The 2013 year saw 5 fantastic Conferences, Tradeshows, Facility Tours and Certified Education tracks come together with a collective 575+ attendees. These great networking events followed CSSA initiatives and issues and allowed owners, vendors and staff a valuable opportunity to share, learn and discuss the industry in general.

A major initiative, fundraiser and lobby effort this year involved Canadian business tax law and the classification of self storage as a passive business. This out of date and quietly passed tax law had resulted in a member being reassessed and penalised to the tune of over \$500,000. Consequently, the CSSA took on his case noting that the law poorly reflected the active nature of the self storage industry. The ground is now set for the Association to go to court in the spring of 2014 as they challenge this ruling and work to change national tax law for the betterment and benefit of the industry. This has been a great rallying point and a prime example of the association bringing members' clout together.

Consequently, provincial tax task forces worked their strength

in numbers to keep these government efforts in check. The best example came from the Ontario Property Tax Task force as they lobbied and were successful in extending the assessment of properties on the existing cost approach. Had they not come together, that Province's facilities would have seen a change to the income approach which would have heavily penalised the business of CSSA's members. The increased collective taxes would have been in the millions and would have heavily penalised operators who ran profitable business through their hard work and efforts, regardless of their actual property and building holdings.

With the airing of Storage Wars Canada on broadcast television, a greater emphasis was put on the best practices of lien sales and disposal. A best practices manual was created and presented in a working discussion at the Alberta Conference. These best practices will give owners and staff a stronger understanding and process to hold their sales and auctions in ways that are fair and defensible if litigated. These practices are particularly helpful and needed given that self storage lien laws are completely non-existent throughout Canada.

Finally, numerous other presentations and discussions were brought forward by the association. Topics included modern

marketing, technological advancements, trends in construction, financing, and charitable giving/events just to name a few.

All in all, it was a very busy year and the value and education from these events and initiatives were significant and often immeasurable. The Canadian Self Storage Association looks forward to the continued success of these initiatives, as well as a new working group that will be recommending self storage related changes to the National Building code.

Provinces across Canada have gotten noticeably more aggressive in their assessment and calculations of self storage properties value and subsequent property tax charged.



City Self-Storage: a 20-year adventure



City Self-Storage proudly celebrated its 20 year anniversary in 2013. Having started with its first site in Norway in 1993, the company now operates from 38 centres in six European countries. This very impressive development clearly positions City Self-Storage as one of the major players within the European Self Storage industry.

With a geographical spread from Scandinavia in the north and Spain in the south, City Self-Storage has also been at the forefront in pushing the boundaries to the east with facilities in the Czech Republic and Poland.

Much of the success is due not only to the very professional and ambitious staff but also to the very professional marketing strategy which has been cleverly tailored to meet the needs of different cultures and, not least, creating a solid return on its investment. With hundreds of thousands of customers in their 20-year portfolio, City Self-Storage has clearly found a formula for European success.

What lessons have been learnt from the last 20 years and what can the rest of the industry learn from City Self-Storage's experiences?

Perhaps the best tip City Self-Storage can give is to take a full scaled customer-oriented approach. This business is about people – It is about being able to meet the needs of private and business customers with flexible storage solutions and to show entrepreneurship and be able to adapt to the local environment. Each market is different and the product, service and supply should reflect this.

It is precisely this approach to its customers that saw City Self-Storage receive the prestigious award for "Best customer service in Europe 2012" during the annual European Self Storage Conference.

Another tip is employee attention. From recruitment to training, to work engagement across borders, City Self-Storage endeavors to build a unique culture and an unrivalled focus on customers. "Only by having the right people with the right attitude and the right frame of mind do we have a chance to actually achieve that goal of ours that is unrivalled customer service" says Niels Meibom-Larsen, COO for City Self-Storage across Europe.

Adding, "While attracting talent with the right attitude, developing skills on all levels and continuing to motivate our employees across borders is a ongoing huge task, we are proud to see the success of our teams and individuals symbolised by winning the "European Facility Manager of the Year" award 4 years in a row".

From the beginnings in 1993 and being part of the family-owned Selvaag Group since 2002, City Self-Storage has had a distinct culture of professionalism, trustworthiness, care for the environment, and creativity that permeates through everything

the team does.

Years of experience have proven to City Self-Storage the importance of shared experiences and "Best Practices" within the industry throughout Europe; whether it be sales techniques, training, retail experience or marketing.

As well as its attention to professionalism, credibility, environmental awareness and creativity, City Self-Storage is particular in treating people properly and striving ever higher in order to deliver consistent high quality standards. Good customer service is only possible if one's own staff enjoy going to work. "Great Place to Work" employee surveys are being utilised and act as incentive tools across all the countries that City Self-Storage are located in. So much so that, in 2013, City Self-Storage's Spanish organisation was listed among the 15 best companies to work for in Spain.

However you cannot have 20 years of operations without making mistakes or some failures. City Self-Storage has learnt its lessons along the way, been through consolidation and built up its operations again.

"Since 2008 we have been in a consolidation mode and we have concentrated on building our brand, revitalising our internal processes, procedures and systems, improving efficiency and transforming our commercial strategy and focus on customer interactions", says Niels.

Italy was a country where City Self-Storage found the challenges to be too great to handle and, therefore, chose to exit the country. He added, "Looking back we definitely made mistakes like most others, and in hindsight we chose the wrong locations for our venture in a very fragile Italian market".

But even through such a consolidation period, along with weathering the European financial crisis, City Self-Storage has maintained positive development on both income and EBITDA levels in year-to-year comparisons – every single year.

So what does the future hold for City Self-Storage?

CEO, Erling Nyberget sums things up by saying, "We now look forward to the next 20 years, as we prepare for the next generation self storage in terms of new sales channels, operations excellence, increased access, product development and market growth."

Adding, "We plan to strengthen our market positions" and ending by saying "Finally we will continue to have full attention on customer and employee satisfaction as well as revenue and cash flow growth."

FEDESSA takes this opportunity to congratulate City Self-Storage and all the team on reaching this important 20-year landmark. We look forward to seeing how the next 20 years will pan out for them. With such dynamic staff and the will to succeed, we have no doubt that their plans for the future will be met.

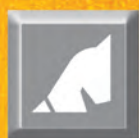
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Rental Storage Association of Japan (RSA)



In March 2003, the Ministry of Land-Infrastructure and Transportation in Japan (MLIT), commissioned a report titled the "Self-storage Commission on the promotion of and enhancement of consumer protection", the results of which indicated strong needs for:

- Clarification of the differences between self storage and general warehouse businesses.
- Accurate and appropriate information for Consumers.
- Establishing standard terms and conditions for the self-storage industry: standard terms and conditions are already applied to the general warehousing industry.
- Establishing an industry association.

Industry action, following the report, led to the founding, in May 2003, of the Rental Storage Association of Japan (RSA): the only self storage association endorsed by the Japanese Government – Department MLIT.

At the time of writing this article, in October 2013, RSA had grown to a total of 30 Member companies – 19 self storage companies and 11 supporting companies.

The Board of Directors comprises of:

Chairman	Michinobu Tada (Oshiire Sangyo Co., Ltd)
Director	Yasunobu Kurebayashi (Reise Inc.)
Director	Hirofumi Fujii (Keiyo Butsuryu Co., Ltd)
Director	Hironobu Ushiyama (Tokyu Corporation)
Director	Stephen Joseph Spohn (Quraz Ltd.)
Director	Satoshi Matsumoto (Storage Plus Co., Ltd)
Auditor	Masahiro Nagai (Sotetsu Real Estate Sales Co., Ltd)

RSA's Mission covers:

1. The provision of information to consumers about excellent self storage services.
2. Lobbying and sending recommendations to MLIT.
3. Development of model standard contracts.
4. Development and dissemination of insurance information.
5. Consultation and certification regarding the development of facilities and improvement methods.
6. Networking and providing up to date information to members.
7. Working closely with MLIT, the Japanese Warehouse Association and Consumer Organisations.

Members meeting the certification requirements for secure facilities are awarded with RSA's prestigious certification logo, as per example depicted.

The present challenges for the self storage industry in Japan are seen as:

- Public Awareness – the self storage industry is still in its infancy in Japan and needs better recognition by general consumers;
- Lobbying for and working with Japanese Regulations and Codes to control higher standards. This work is mainly to gain distance between the professional self storage industry and the numerous number of companies making use of 'sea-container' for storage operations in Japan. The RSA is totally against this latter type of operation which it sees as being inadequate.
- Making the best of the industry's large potential to grow by adapting to more advanced marketing, strategy and technology methods

FEDESSA is grateful to the RSA - Secretary-general, Mr Tokuo Yoshida for contributions used in this article.



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EU seals agreement on audit sector shake-up

Proposals forcing listed companies to change accountants every ten years were agreed on 17 December 2013 as part of a wider EU package to reform the audit sector.

The move to reform book-keeping practices came three years after auditors were widely criticised for giving banks a clean bill of health just before they needed taxpayer bailouts in the financial crisis.

The changes seek to stop auditors becoming too cosy with clients, make them challenge what they are told and inject more competition into the market.

In one of the most strongly contested provisions, listed companies will be required to rotate after an engagement period of 10 years. This term can be extended by a further 10 years following a tender, and by up to 14 years where companies are audited by more than one firm.

Auditors will be strictly prohibited from providing non-audit services to their audit clients, including limits on tax advice and advice on the financial and investment strategy of their clients, in an attempt to ensure their relationship remains at arm's length.

The reform also bans clauses in bank loans to companies that stipulate their accounts must be audited by one of the so-called "Big Four" (Deloitte, PwC, Ernst & Young and KPMG). Auditors would also have to give an overall assurance over the accuracy of company accounts.

The European Parliament's legal affairs committee originally wanted to allow companies to keep the same accountant for up to 25 years, significantly diluting the Commission's original proposals calling for a switch every six years.

The six-year proposal ran into a barrage of criticism from companies and investors claiming that such a provision would cost companies in time and manpower involved in the re-tendering process.

Coordination of supervision of auditors at EU level

The new rules will also cap at 70% of total billing the fees firms are permitted to generate for non-audit services.

Cooperation between national supervisors will be enhanced at EU level, with a specific role devoted to the European Markets and Securities Authority (ESMA) with regard to international cooperation on audit oversight.

NOTE: The political agreement still requires some technical finalisation and formal approval by the co-legislators.



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25-27 March 2014 Renaissance Harbour View Hotel, Hong Kong

The inaugural Self Storage Expo Asia was held in March 2013. Around 140 delegates attended this first ever self storage conference and trade show held in Asia.

Organising a self storage expo in Asia was the idea of Steel Storage's founder, Jon Perrins. As a leading solution provider to the self storage industry, Steel Storage has been providing its products and services to the Asian self storage market since 2003.

Still rated as a booming market for self storage activities, Asia's property prices increase year on year and consumerism seems to be an unstoppable force as more and more of Asia's four billion inhabitants move steadily towards the middle-income class. With it comes a transition to modern living and self storage appears to be a proven and necessary part of this modernisation.

Whether you are new to self storage, have just started in self storage or are a veteran with interests in being involved in self storage in Asia, the Self Storage Expo Asia 2014 will aim to answer all your questions during the course of the Expo

In some Asian countries the self storage market is so mature that large investments are being made and the first portfolio sales are starting to happen with \$100's of millions in transactions already completed.

Stemming from experiences acquired at the European Self Storage Conferences, Jon was able to develop and bring the conference concept to Asia in 2013 in the form of an 'Expo'. This idea was supported by Dallas Dogger, CEO of Centreforce Technology Group, based on the success of the expo he held in Sydney where the focus was on self storage education and sharing experiences. This enabled those interested to investigate and learn more about self storage investment opportunities in the region in addition to bringing existing operators up to date with

the latest products and news.

Some of the industry's leading experts came together to share their views and advice. In addition to Steel Storage's design, manufacture and construction capabilities for partitioning and door systems, the show included experts on:

- Self storage operation and ownership
- Buying and selling self storage facilities
- Appraisal and property acquisition
- Self storage management consultants
- Suppliers of access control and security systems
- Operational software developers
- Lock and merchandise providers.

In addition, two industry panel sessions gave attendees the opportunity to ask industry veterans questions and the chance for more in-depth discussions.

The 2014 conference and trade show promises to equal or even surpass the first event.

So, as Jon says "Whether you are new to self storage, have just started in self storage or are a veteran with interests in being involved in self storage in Asia, the Self Storage Expo Asia 2014 will aim to answer all your questions during the course of the Expo."

Extend your stay and enjoy the rugby at the biggest event on the IRB Sevens calendar, the Hong Kong Sevens, which is held over three days straight after the Expo. Flight and ticket packages are available through Cathay Pacific.

For further information contact the organiser: Natasha Johnson
Phone: +61 7 3865 1600

Email: natasha@selfstorageexpo.asia www.selfstorageexpo.asia

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Locker Locker planning to ramp up self storage expansion throughout China

Co-founder of Locker Locker self storage Charlotte Sun says "Our plan is to create our brand as we open 10-15 locations here in Shenzhen and then to start to expand outside of this city to more tier 1 and tier 2 cities. Looking forward to 5-10 years from now, we are aiming to have at least 60 locations throughout most major cities in China".

Locker Locker was launched in May 2013 - the name being chosen as it was easily memorable, with instant appeal, while also providing some idea of the service being provided.

Self storage is about convenience - even in Asia - so the old adage 'location, location, location' certainly still applies. Locker Locker's first facility is located by a major traffic artery within a densely populated district in Shenzhen, China. The facility is equipped with state of the art features including IP CCTV, website, door entry and operational management systems - together with a high end fit out, instantly providing an outstanding product.

Shenzhen is in one of the most highly populated areas on the planet, within a conurbation with Guangzhou, comprising of around 100 million people.

From the start, it was necessary to have a strategic marketing plan to make potential customers in the catchment area aware of the self storage concept. The initial campaign was therefore aimed at 'awareness' by broadcasting the benefits of self storage services. First off - a huge, four-floor high, luminescent signage wrapped around the building, grabbing attention of all passers by and drawing attention to Locker Locker's multi-lingual website. In addition, highly visible illustrations are incorporated into all of the marketing material which also extends to the graphics on the side of company vehicles which are seen around the neighbourhood on a daily basis.

Locker Locker firmly believes that there are numerous reasons to launch self storage in China - not least the fact that China is currently the world's number 2 economy, with a rapidly growing middle/upper income population in tier 1 & 2 cities, driving domestic consumption. Huge integrated development projects in these cities are creating large amenity complexes and the need for services, in many ways a mirror of the more mature world economies such as the U.S, Europe and Australia. Tier 3 cities are not far behind and projects by centralised government are already giving a big boost to modernisation and improving the quality of life.

China is a very dynamic, rapidly changing society and Locker Locker is convinced that now is the best time to move self storage to the next level of success through greater investment

and expansion.

It is clear that Locker Locker has created the beginnings of a strong brand. This process is likely to continue for the next few facilities, allowing the company to capitalise on the growing value of its brand.

As far as we are aware, all the 'early' Chinese self storage pioneers are still in business, developing at a strong pace with occupancy levels typically being reached faster than their more established western counterparts.

In Locker Locker's case, the rapid take-up and recognition by the local community has been encouraging. With a territory comprising 19% (1.2 billion) of the world's population it will, no doubt, be a long road ahead to build up the momentum of bringing self storage services and benefits into the mainstream.

But! what an opportunity - with China being strongly tipped as the next most lucrative market with potential to grow even bigger than the USA!

Annual self storage conferences in Hong Kong started in 2012 and interest, in entering the Chinese self storage market, is growing all the time from local and overseas entrepreneurs alike.

The Locker Locker team's hard work and dedication with the executional and operational stages of the project, developing the building and making it a reality are already beginning to pay off.

Martin Sherwood a Director of Locker Locker said "Building strong cash flow is vital to our success as an operator, funding our expansion downstream as we continue to procure properties and expand our business."

Adding " We are now in prime position to spearhead the next generation of self storage facilities in China with continual investment, a growing business, awareness of the product and filling our facilities rapidly with further expansion on the horizon."



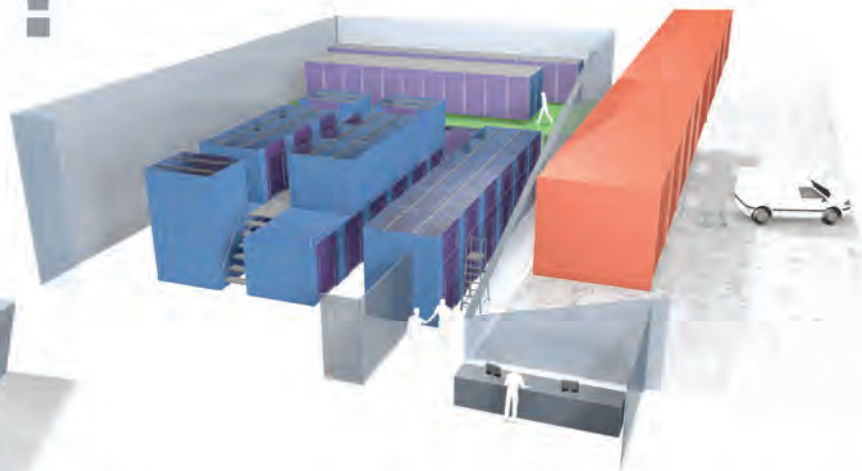
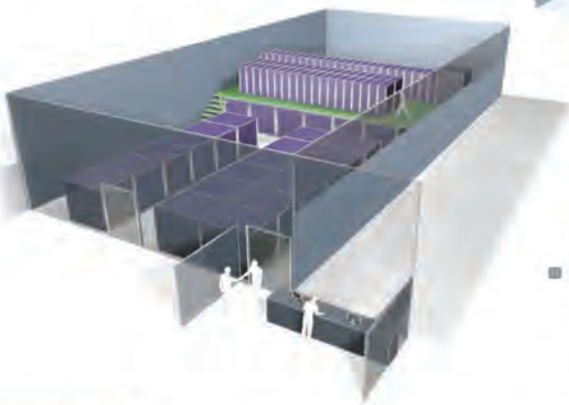


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Company Feature



Shanghai A western practice has landed in China

You You Space, the 1st SSAI member (Self Storage Association International – a subsidiary organisation of the SSA in the U.S.) company in mainland China, set up 3 years ago when they opened their facility in Shanghai.

It was not easy setting up a new type of business model, such as self storage, in China.

Most Chinese really don't like to put things out of sight. You You Space faced the problem of getting people to drop their old traditional ways and consider new convenient city lifestyles.

Because the term "self storage" is a very new concept to most Chinese residents, You You Space brainstormed a lot of ideas aimed at 'educating' the Chinese market. They created a catchy slogan: "Self storage service works for life just like a unique 'external hard disk drive' does for business and life." This helps people identify with an image of what self storage service is and how it works. They explain how people can take their excess belongings from their small apartment to You You Space for safekeeping, likening it to removing files from a computer hard disk to an external disk drive.

The facility opens everyday so that customers' can gain access to their belongings whenever needed.

The main reasons people in China utilise self-storage:

Trends are fluctuating, but the main reasons can be summarised as hobby collections, relocation, home renovation, and small business inventory. Another special reason is to store gifts. People affirm good relationships by sending gifts to each other during holiday seasons because of the traditional Chinese culture.

China is a nation of over a 1.5 billion people with a growing consumer class.





Despite the tremendous demand for new products and services, many 'Western' businesses fail to succeed in the Chinese economy because of the strong traditional culture and strict governmental controls.

You You Space have spent a lot of money on market promotion in order to distinguish the self storage service from the more traditional B2B warehouse business. They have also put a lot of effort into building good governmental relationships. In China it is important to have strong ties with the local government, not only because people trust government-backed legitimate businesses, but also because it indirectly helps to make the business run smoothly. For example, China has one of the strictest fire codes and construction inspection systems in the world.

Without many official stamps of approval, it is simply impossible to start a business and run it smoothly. Similar situations apply via other government departments.

As a result of their attention to detail You You Space were awarded the 'Best innovation prize' by the Chinese government. Their brand name is now getting positive and favourable publicity. Not only do they receive requests for interviews from local newspapers and local TV channels, but they have also been interviewed about their brand and business model by China CCTV, the most famous national TV channel in China. All of this has helped build a customer base in the thousands, more brand recognition and indeed attention from all over China, which also helps the self storage industry in general.

You You Space's future plan?

In the short-term, You You Space believe that it is more important to educate the market before expanding the number of sites. In the long-term, the aim is to have more facilities so that customers have less than 20 kms to travel from their

apartments.

A strong, positive brand will then help them to expand into every major city in China. Franchising is also a good option which You You Space is considering.

China is a nation of over a 1.5 billion people with a growing consumer class. Many 'Western' businesses fail to succeed in the Chinese economy because of the strong traditional culture and strict governmental controls.

In order to build a healthy operation, they have developed their You You Space's Special lean management system, called YYSS LMS. Self storage business always bears a large fixed cost problem. You You Space, therefore, do anything possible to reduce three types of waste during their routine work. They focus on: reducing non-value-adding work; overburden; and, unevenness, to make their daily work more effective and efficient.

The flagship facility of You You Space is a 3-story site, 42,000 sq. ft., which contains about a thousand units in various sizes.

Average occupancy rate is around 65% and is gradually increasing. They serve individuals, families and business clients. The service team requires a wide range of cultural knowledge and a high level of education as they are dealing with customers from more than thirty different nationalities.

Chief Executive Manager, Steven Y. Chen, MPA, PMP sums up matters by saying "Last but not least, as an operation leader of the first standard self storage company in China, I am not only looking at You You Space as a new business brand but rather see it as a revolution of helping customers to gain a new lifestyle."

He adds, "We want to build a strong brand image and offer more and more service value to our customers day after day. Our mission statement is: "To make the You You Space Self Storage experience great for people all over China and to run a company we can all be proud of."