

**Interreg
North Sea**



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Digital Kiosks

Sharing Stations European Market Study

What is the current state of the sharing station market?

 **EURATECHNOLOGIES**
EUROPE'S STARTUP BUILDER

January 2025

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1. The Sharing Station Landscape in Europe

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What is a sharing station?

A sharing station is a self-rental system where users can access a variety of goods for a short period of time (a few hours to a few days). Users can access these goods for free, through a pay per use scheme, or a monthly subscription.

Sharing stations are typically operated by a company, a community or another third-party to take care of the maintenance and the customer service.

We distinguish three types of sharing stations:

- Multi-purpose sharing station
- Thematic sharing station
- Single-purpose sharing station



We distinguish three types of sharing stations on the market



MULTI-PURPOSE

These sharing stations provide access to a variety of consumers goods in different use cases (e.g. home appliances, electronic equipment, tools and others).

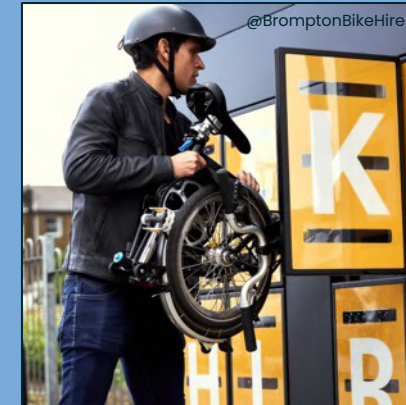
These stations can be found mostly within indoor environments, in libraries, residential buildings, retail shops, etc.



THEMATIC

These sharing stations provide different goods from the same category of equipment (e.g. sport, audiovisual, etc.).

This segment of the market is dominated by companies focusing on sports and leisure equipment, that we will call in this study "sport sharing stations".



SINGLE-PURPOSE

These sharing stations provide access to only one specific type of goods. We currently see examples such as balls, paddle surfs, bikes, umbrellas, chairs, etc.)

Such sharing stations are usually linked to a specific venue (e.g. a basketball available directly at the playground).



A new infrastructure for the access and sharing economy

The sharing station is a new smart infrastructure to power the access and sharing economy in the city. Through connected lockers, users can access goods in the city autonomously and at any time.

Sharing stations offer huge opportunities to make cities more sustainable and liveable:

- Citizens now have **access to goods directly where they are used and needed**. It increases **access to sports and leisure activities** and encourages **spontaneous use of the city**.
- It reduces the need for people to buy under-utilised items and promotes **access over ownership**, thus reducing manufacturing emissions and saving space in the home.



Sharing stations in Europe

A growing trend in the last years

1325

sharing stations

185

multi-purpose stations

1140

sport stations

+350.000

unique users

+70%

growth in number of stations
deployed between 2023 and 2024



Cities with most sharing stations in Europe

Number of sharing stations in the wider areas of cities

Sharing stations providers present



1. London

117 sharing stations



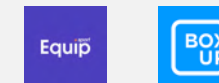
2. Paris

105 sharing stations



3. Lausanne

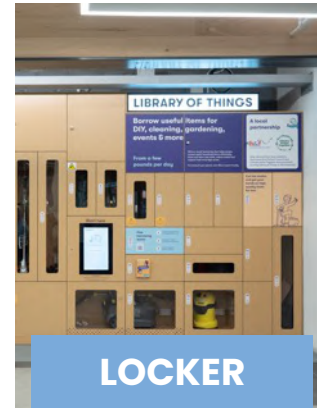
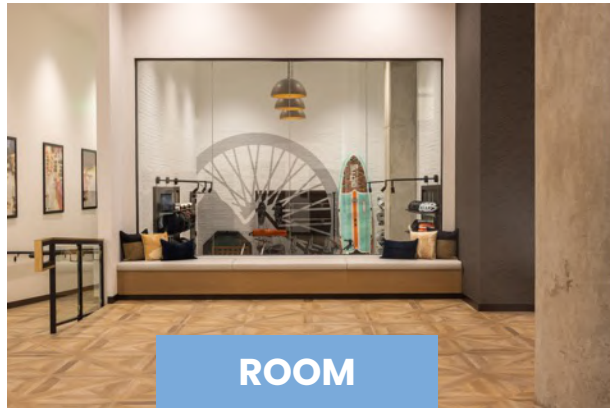
43 sharing stations



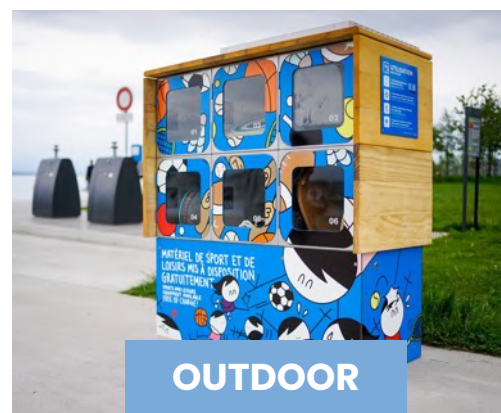
Different sharing stations designs and setups

Sharing stations can have different forms and levels of accessibility depending on their locations

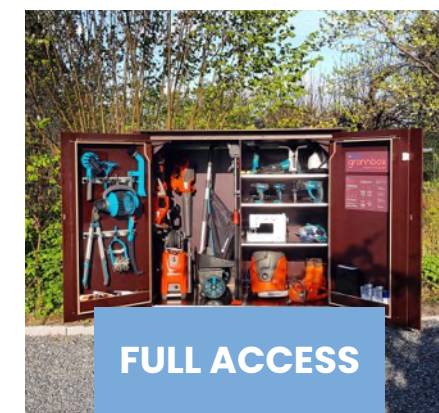
DESIGN



LOCATION

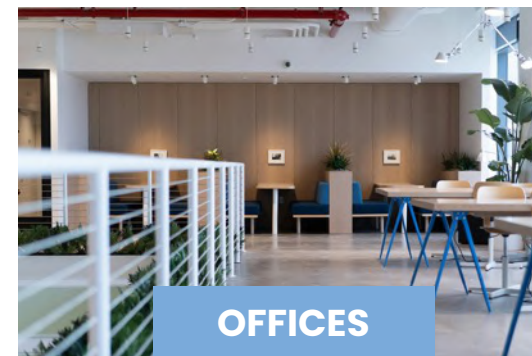


ACCESSIBILITY



Europe's 185 multi-purpose sharing stations serve many different use cases

The majority of sharing stations are deployed in residential buildings and student residences



Main clients and partners

- Municipalities
- Residential landlords and real estate developers
- Student residences
- Retail group
- Large companies

Proximity and Impact vs Profitability

Different use cases have different business cases and potential impacts



Retail is the bigger bet

Fully accessible sharing stations, located in retail shops, have the highest average basket (four to five times higher than in residential buildings).

"It's easier to convince 10% of your addressable market in the surrounding of a retail shop than 50% of a building".

Residential sharing stations have proximity

Several under-utilised items owned by citizens may only be shared in an ultra-proximity sharing station. Items such as vacuum cleaners might only be rented if located in the building.

The majority (90%) of sharing stations currently in use are in residential areas.



Europe now has more than 1140 sport sharing stations in different locations

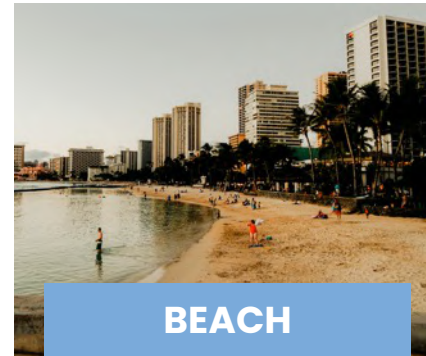
The thematic sport sharing station has grown into its own niche market



PLAYGROUND



SPORT VENUES



BEACH



PUBLIC SPACE



CAMPING SITES



CAMPUSES

Main clients and partners

- Municipalities
- Governmental organisations
- Real estate companies
- Touristic organisations
- Sport clubs
- Universities
- Healthcare providers

Equip Sport deploys more than a 100 sport sharing stations in Paris



Equip Sport is a Swiss-based company operating sports-sharing stations, co-founded with Didier Drogba. To date, the company has successfully deployed over 330 stations across Europe.

With unique expertise in transforming urban spaces into thriving hubs of activity, Equip has made a significant impact in cities like Paris (100 stations), London (40 stations), and Lausanne (30 stations), providing over 100,000 hours of free sports last year.

Equip represents the future of sports-as-a-service, offering a unique business model that enables cities to maximize the potential of their sports locations.

<https://equip.sport/>

BoxUp publishes impact study of its sport sharing stations

BoxUp is another Swiss-based company which operates sport sharing stations. The company operates 260 stations in Europe and Canada.

The operator commercialises one modular station that can include a different number of compartments and items.

BoxUp recently had two major developments: (1) a large deployment of 85 sport sharing stations together with the Government of Quebec in Canada, and (2) the integration of its sharing station within the budget and strategy of the Swiss Canton of Neuchatel.

BoxUp has also recently published a new impact study of its stations, [available here](#).

<https://boxup.app/en/>





2. Sharing Station Business Models

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Startups have different value propositions towards clients

Infrastructure provider

The startup provides the digital infrastructure for users to share items (the app); they also provide a physical, connected locker. One company, Circular Library Network, differentiates itself by providing the connected locker system that can be installed on any locally available furniture.

Turnkey operations

The start-up will set up the sharing station and operate it directly. They will purchase and own the equipment and employ a local person to provide customer service and maintenance.

	Infrastructure provider	Turnkey operation
Circular Library Network	✓	
Library of Things	✓	✓
Les Biens en Commun		✓
Tulu		✓
Ihopa		✓

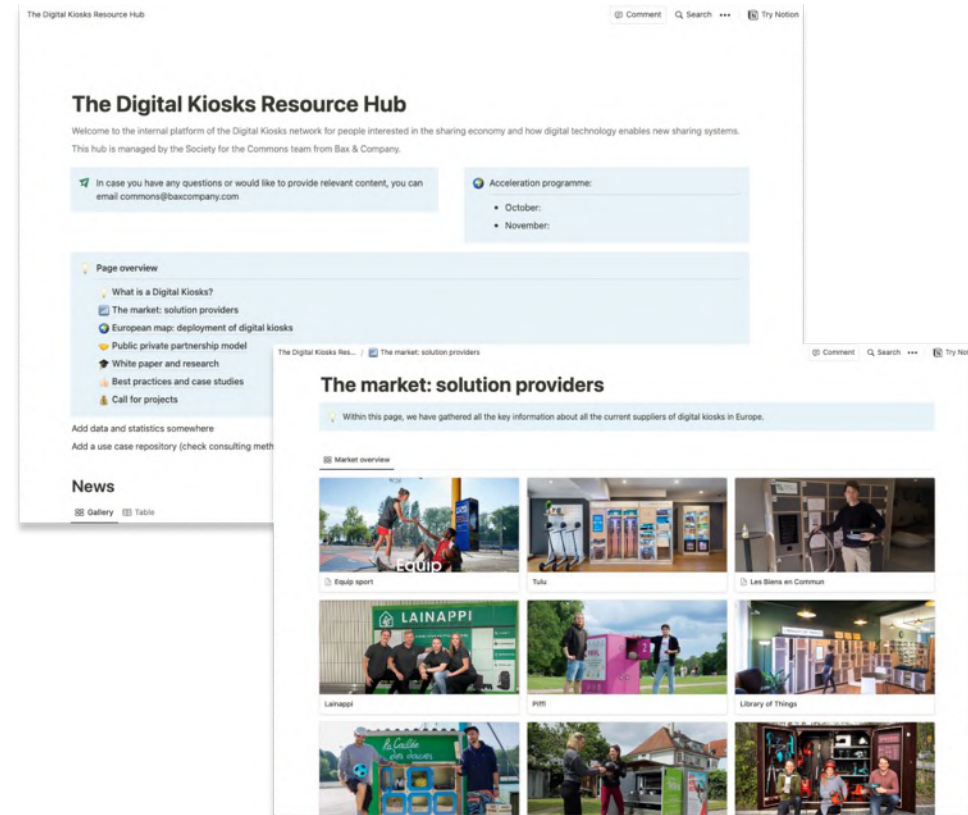
MULTI

Equip Sport		✓
BoxUp		✓
Piffl		✓
SportBox	✓	

THEMATIC / SINGLE

Visit the Digital Kiosks Knowledge Hub to access more information about the startups

The Digital Kiosks Knowledge Hub ([link](#)) has been created by the Digital Kiosks Network to make knowledge about sharing stations more accessible to the European community.



Circular Library Network provides sharing station infrastructure



Circular Library Network (CLN) provides the infrastructure for communities to share tools and household items.

CLN has evolved into a tech company, developing a modular and adaptable system that combines hardware, software, and a social platform to make sharing more scalable and convenient.

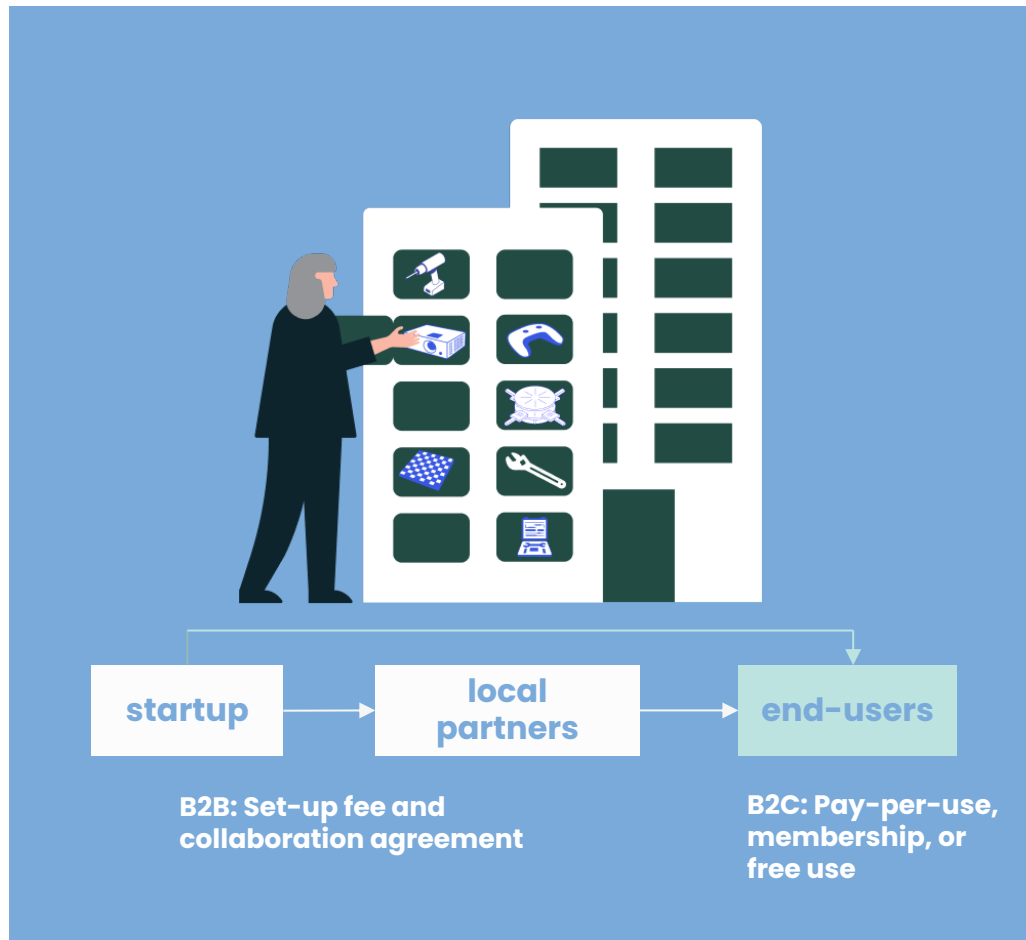
CLN's system has been implemented in libraries, community hubs, supermarkets, co-working spaces, real estate, universities and municipalities.

The company currently provides the most cost-efficient sharing station infrastructure available on the market.

<https://www.circularlibrary.network/>

Many startups provide local partnerships

Startups using a turnkey model work with a B2B2C model to set-up and operate sharing stations.



COSTS

Local partners pay for the initial set-up of the sharing station service in the form of a fixed fee, and then pay an annual or monthly fee to cover the operations of the service.

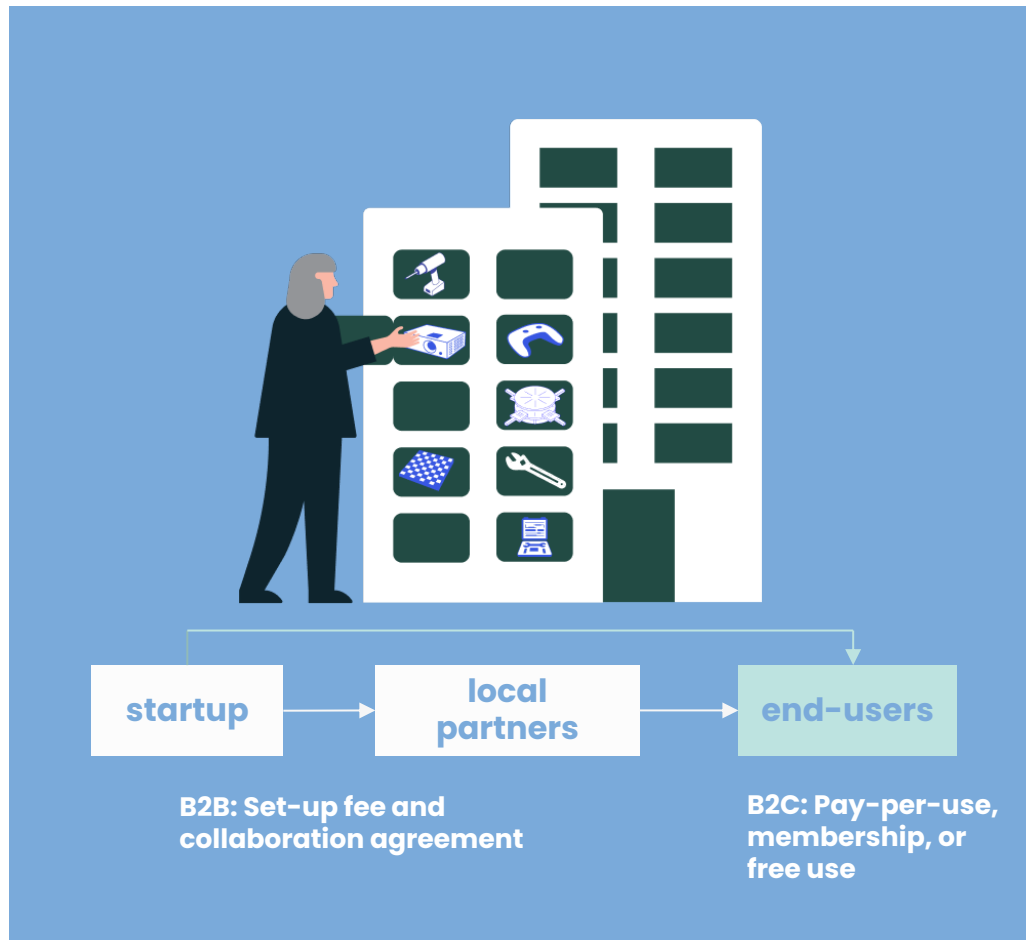
While the majority of startups propose an investment model (large fixed fee to cover the costs of the locker), some companies propose a leasing offer, to reduce the upfront cost, with larger annual or monthly fees.

REVENUES

- **Revenue share:** startups may offer a share of the revenues (20 to 50%) generated through the rental of goods, depending on locations.
- **Advertisement:** startups do offer space for advertisement of the sharing stations. One start-up even finances some entire projects with advertisement.

Average costs to deploy sharing stations

Estimated costs of sharing stations (investment model), paid by local partners (e.g. municipalities, retailers, housing providers, etc.).



MULTI-PURPOSE 10 ITEM STATION

1k – 12.5k

Fixed deployment fee

0k – 10k

Annual fee

SMALL SPORT STATION

3k – 6k

Fixed deployment fee

0k – 3k

Annual fee

MEDIUM SPORT STATION

6k – 18k

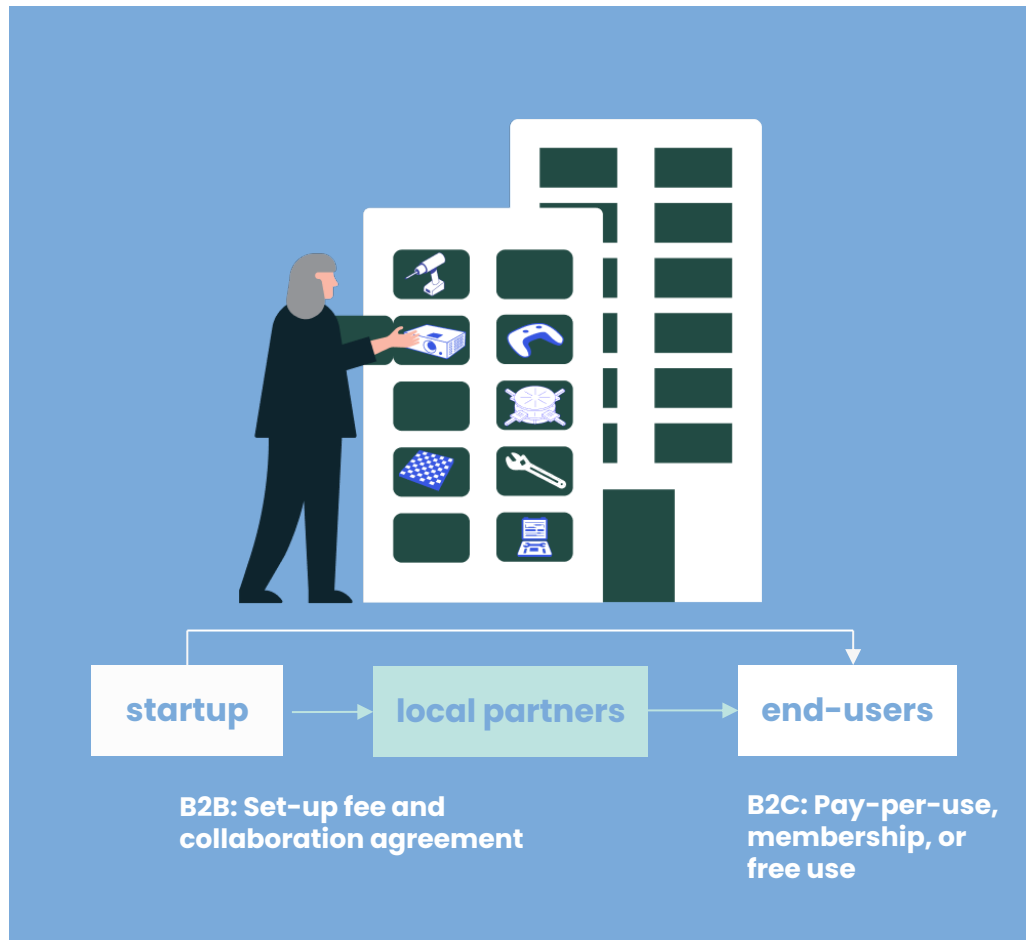
Fixed deployment fee

0k – 15k

Annual fee

Revenues generated through B2C models

Sharing stations have different fares depending on the use cases



MULTI-PURPOSE SHARING STATION

Pricing

Pay-per-use

- Hourly base (1-3€)
- Daily / weekly base (10-25€)

Membership

- Unlimited use (+/- 8€)

Observation

Pay-per-use

Large differences in average baskets between use cases. Fully accessible sharing stations in retail have an average basket four times higher than in residential.

Membership

This fare model is not yet offered by all sharing station operators, but is being developed by most.

SPORT SHARING STATION

Pricing

Free for thematic sport stations.

Pay-per-use for some single-purpose sharing stations (e.g. stand-up paddleboard).

Observation

Most thematic sport sharing stations are for free as there is little willingness to pay for low-value items.

Sharing stations are deployed through different approaches

Sharing station as a public service

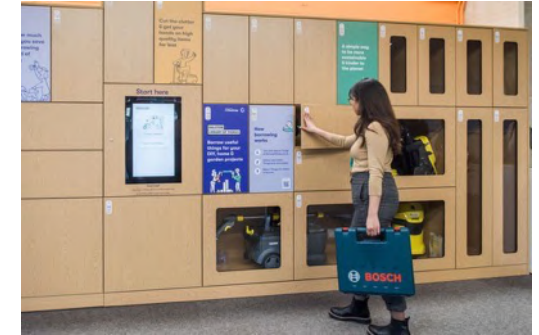
Municipalities provide a service to their citizens through subsidised sharing station schemes. Most sports sharing stations are provided in this way. This is not the case for multi-purpose sharing stations, although a few are funded in this way (e.g. Library of Things in London is funded by local councils to run sharing stations in public libraries).

Sharing stations deployed through housing associations and private retailers

Housing providers and retailers offer a sharing station to increase the attractiveness and value of their premises. Most multi-purpose sharing stations are provided through such a scheme.

Sharing stations as community projects

Not-for-profit organisations and communities are setting up sharing stations and running operations. Many lending libraries, usually subsidised but reliant on volunteers, see the sharing station as an opportunity to improve the quality of service and to free up time and dependence on volunteers.



Making the service even more affordable and accessible to those who need it



Library of Things is UK startup based in London who both operates and provide infrastructure for multi-purpose sharing stations.

The company has a no-questions-asked 25% discount Concession Member, which is targeting users who are unwaged, low income or students and others.

As part of their social mission, Library of Things can offer municipalities a no deposit solution to reduce the financial and psychological barriers for some user groups as well as provide a deposit required solution for other entities.

<https://www.libraryofthings.co.uk/>

Sportbox deploys 150 sharing stations partnering with the German Olympic sports federation

SportBox, a Germany-based company, provides an innovative sports-sharing platform with more than 390 stations across Europe. The company focusses a low-threshold rental service for sports and recreational equipment, making physical activity more accessible to everyone, most often free of charge.

SportBox offers various station sizes to meet specific various sports facility's needs. Whether just for one basketball field or a large sports complex, their solutions fit the surrounding infrastructure.

A significant milestone for SportBox was achieved recently: deploying 150 sports-sharing stations across Germany in collaboration with the German Olympic Sports Federation to increase sports among the population and increase sport club memberships.



www.sportbox.de/en/

Operational data about the use of sharing stations

	MULTI-PURPOSE	SPORT
MOST RENTED ITEMS	Cleaning equipment Hoover Steam Cleaner Jet washer Carpet Cleaner Tools Drill Hand sander Cooking equipment Raclette machine Small oven Other Printer Boardgames Iron Videoprojector	Sport equipment Mölkky Spikeball Football and Basketball Volleyball Minigolf Table tennis Cornhole Super Jenga Fitness equipment
NUMBER OF RENTALS PER MONTH PER STATION	15 – 85	2 – 3 in low season 60 – 200 in high season
AVERAGE USAGE TIME	Residential buildings: Few hours Retail and other fully accessible locations: Few days	40 mins
NUMBER OF REPAIR & REPLACEMENTS PER YEAR	No consolidated data available.	1-10% of the items need to be repaired and/or replaced per year

Les Biens en Commun shifts towards public deployment

“Deployments in public locations are the best way to rapidly generate usage and scale the model.”

Les Biens en Commun is a French startup based in Lyon who operates multi-purpose sharing stations in shopping centres, offices and housing residences.

The company currently operates 30 sharing stations in France and Belgium.

Les Biens en Commun now prioritises deployments in retail stores and large companies over residential buildings. Experience has shown that increasing rapidly the number of users is easier when addressing a larger population, even if the service is a bit further away and not available 24 hours a day. People also tend to rent for a longer period, increasing the average spending and improving the economic viability for the operator.

<https://lesbiensencommun.com/>





3. Future Trends

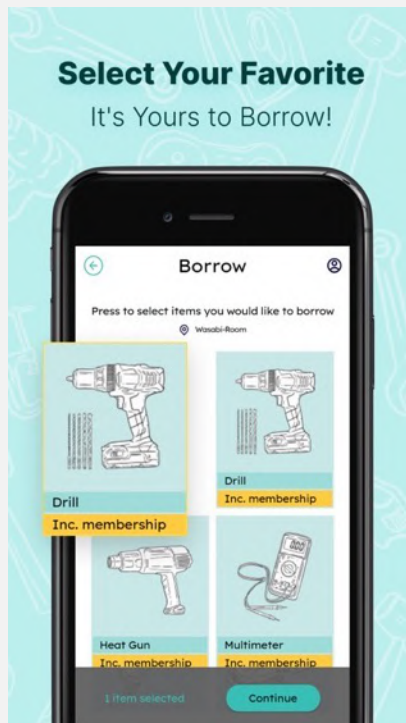
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The value will be more focused on digital applications in the future



Some important features include

1. Reservation of items
2. Membership schemes
3. Dynamic pricing
4. Integrated marketing features
5. Environmental impact calculator

Other services provided by sharing station providers

- Workshop with communities
- Shared vehicles (next to station)
- Snack, foods and other consumables (next to station)
- Delivery of additional goods
- Events, coaching and tournaments

The sharing station is a paradigm shift for brand manufacturers

Major brand manufacturers and retailers such as Kärcher, Decathlon, Bosch have already understood the impact that sharing stations can have on their business.

The sale of goods could change radically, with an increase in turnover through rental systems and a potential decrease in direct sales to consumers.

In addition, sharing station operators could have a strong marketing reach and increase visibility to consumers, making them a strategic partner for brand manufacturers.

In the long term, several product lines (e.g. vacuum cleaners, sports equipment) may need to be rethought to provide goods made for sharing (more repairable, more robust, more intuitive to use, etc.).



Collaboration between Decathlon and Equip Sport.



TULU partners with trusted global consumer brands such as Kärcher, Bosch, Nebula, and Versuni (Philips).

Future trends and developments in the sharing station market



Decrease in set-up and operations costs of the sharing stations



Development of large municipal budgets for sharing stations



New partnerships with brands and manufacturers



Increase in awareness marketing to increase user base



New use cases to explore for sharing station providers (e.g. with retailers)



Policies such as the Right-to-Repair, if properly implemented, should help improve operations

Our methodology

The European market study was carried out using a quantitative and qualitative approach.

This study is the first to propose a definition of a sharing station, which has been validated with 20 different partners (e.g. European municipalities, start-ups, researchers, etc.).

The data and information presented in the study have been collected through a survey and interviews with 8 sharing station providers from Europe.

This study was commissioned by Euratechnologies as part of the Interreg North Sea Digital Kiosks project.



Get in touch

Euratechnologies and Holland Circular Hotspots are part of the Digital Kiosks project that regroups cities, NGOs, researchers and other practitioners to accelerate the uptake of the sharing and access economy.

Get in touch for more information.

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