

IRN-100 & RentalTracker

IRN-100 Survey Results &
ERA/IRN RentalTracker Update

Murray Pollok, Editor
International Rental News
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The Topic

IRN-100 Survey

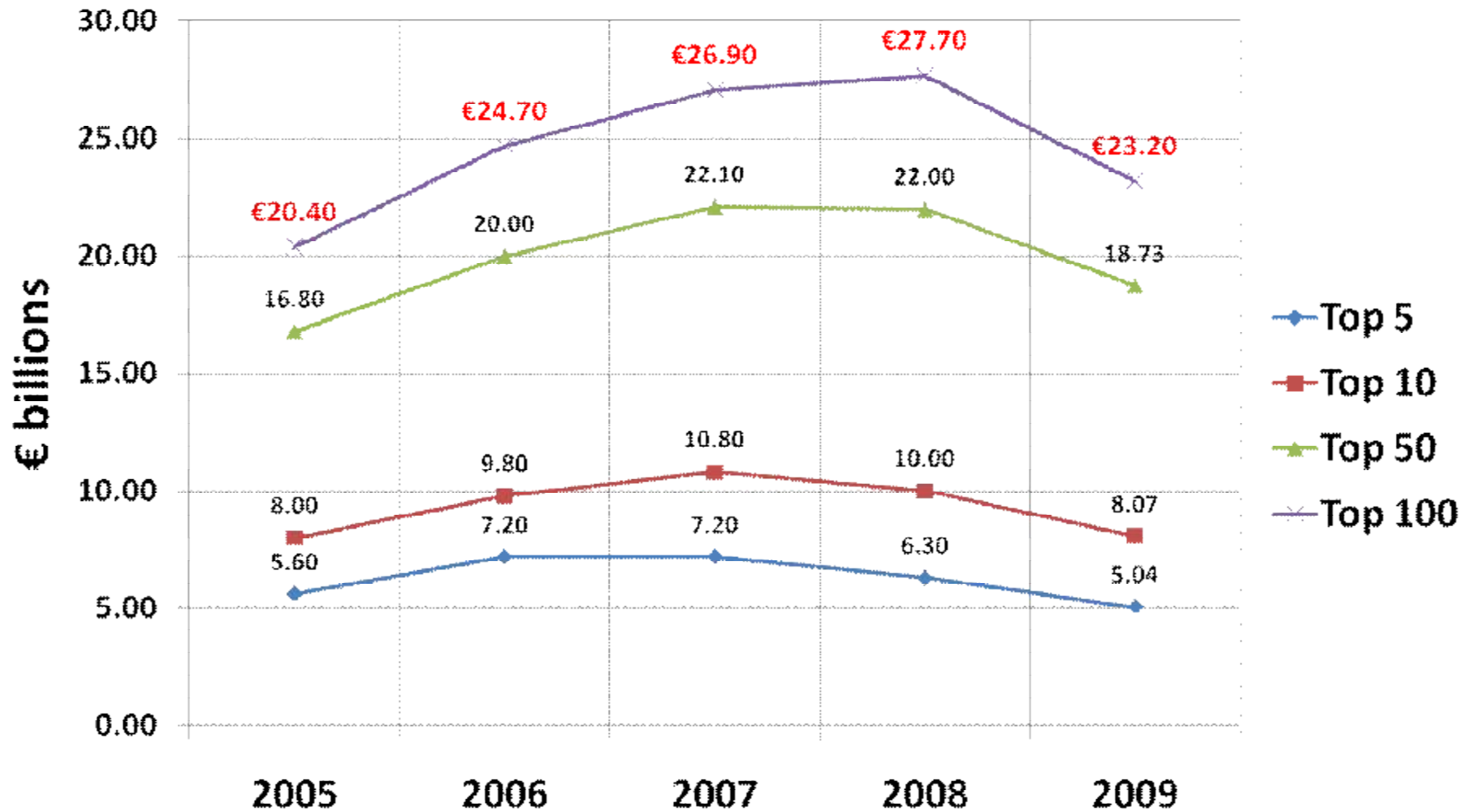
- Results for 2009
- Trends in the Market

ERA/IRN Rental Tracker Survey

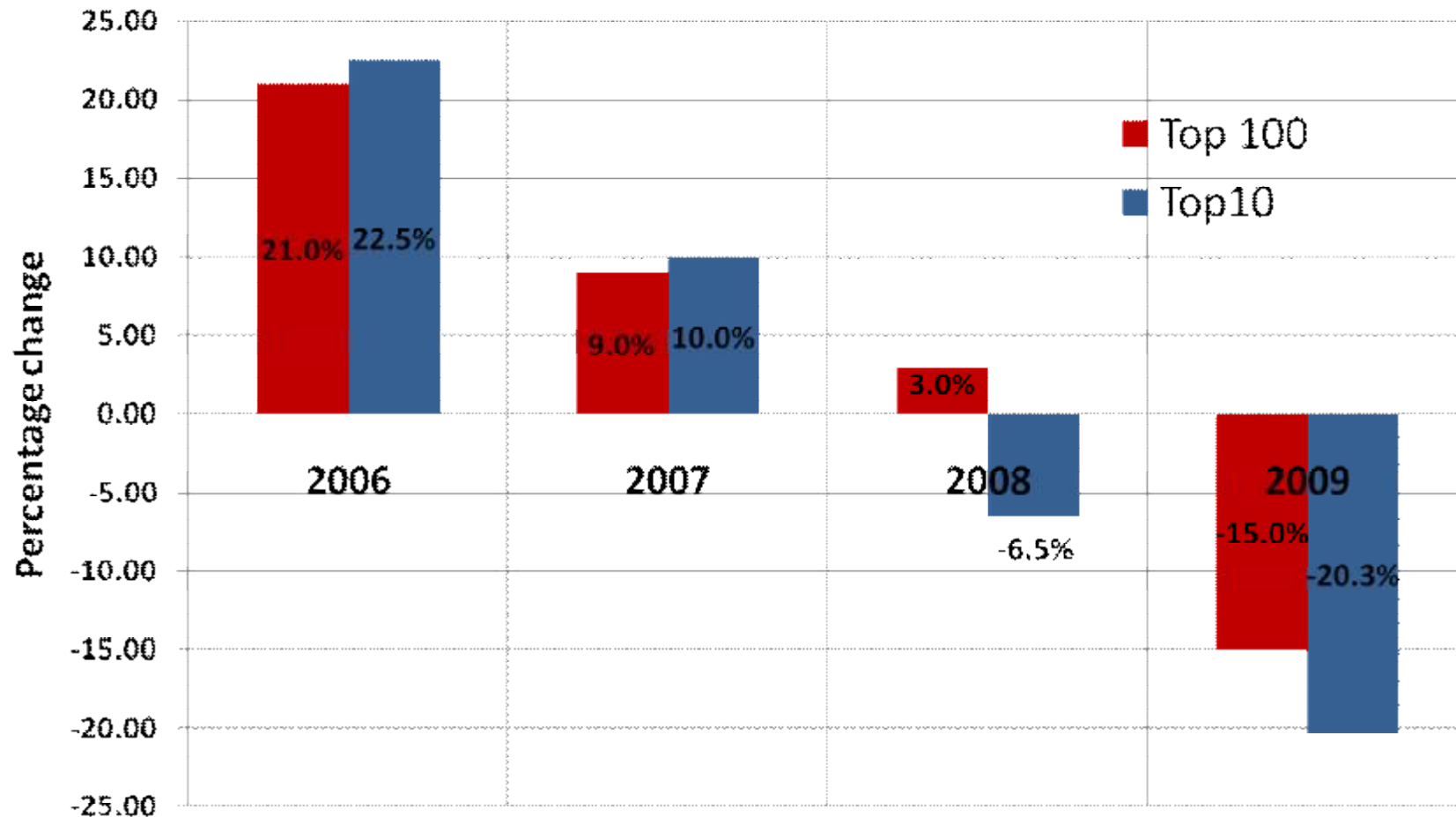
- Results from Q1 2010 Survey
 - Current Business Conditions
 - Time Utilisation Trends
 - Investment Trends



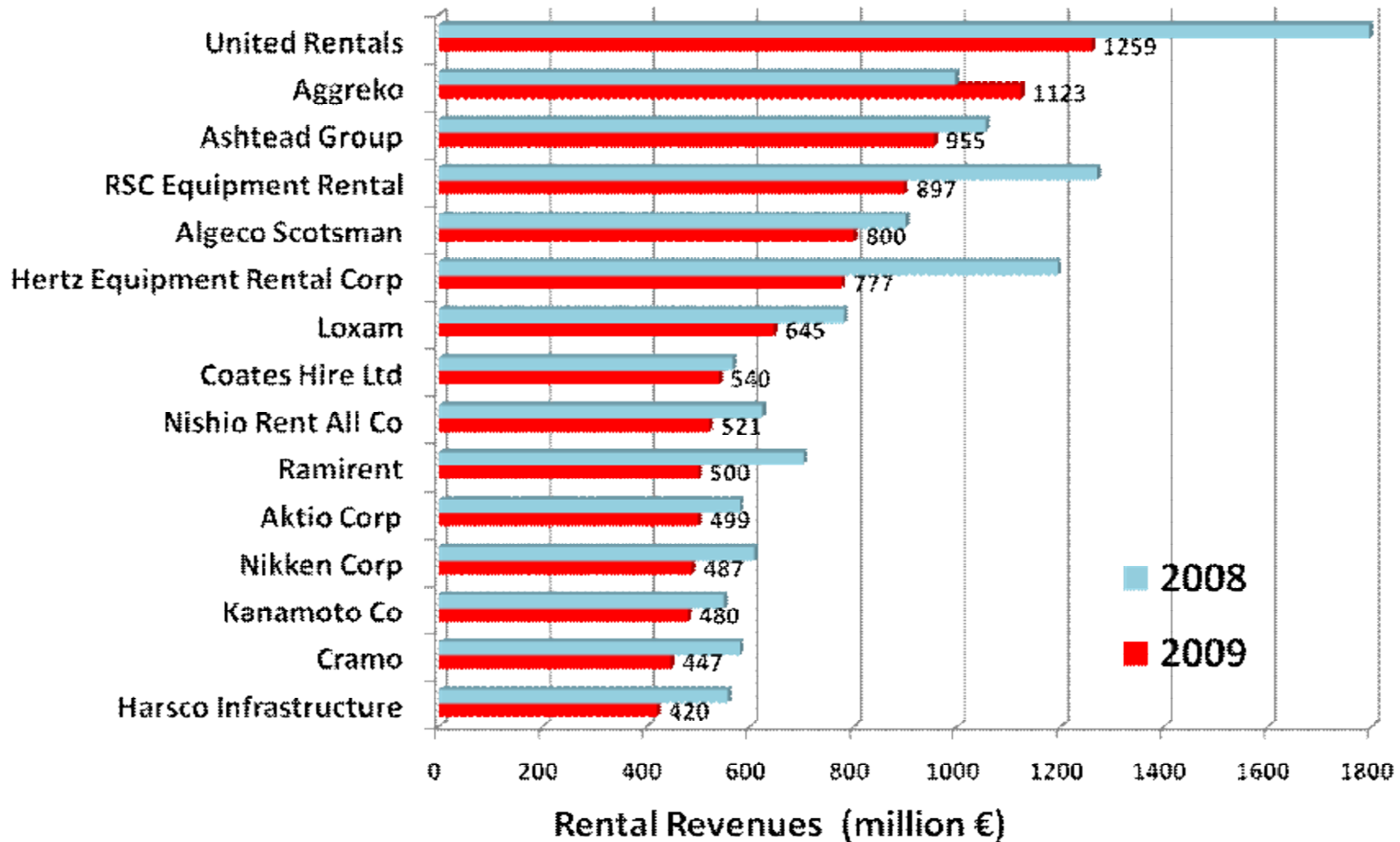
Trend in IRN-100 Revenues



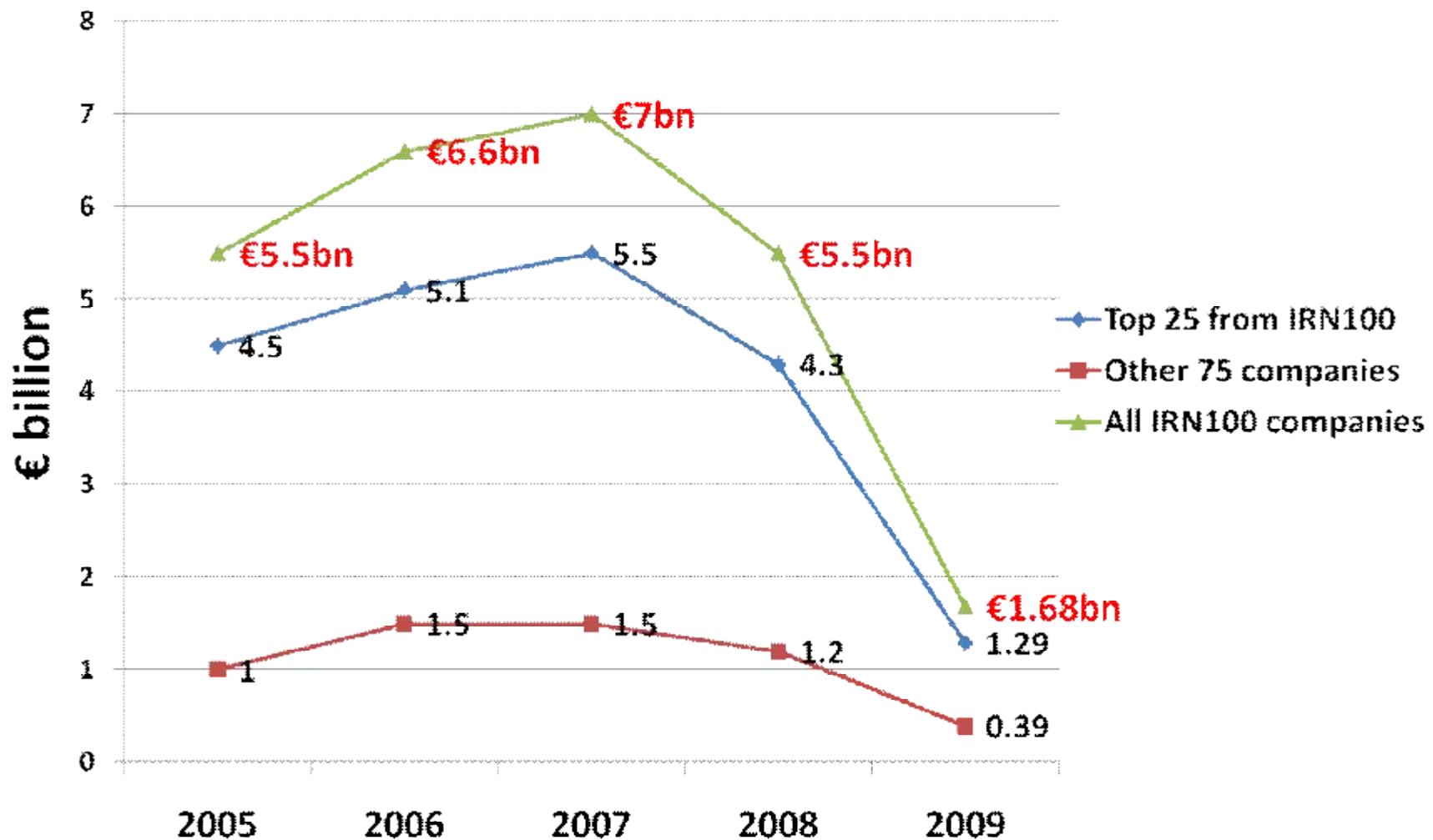
Year-on-Year Change in Revenues



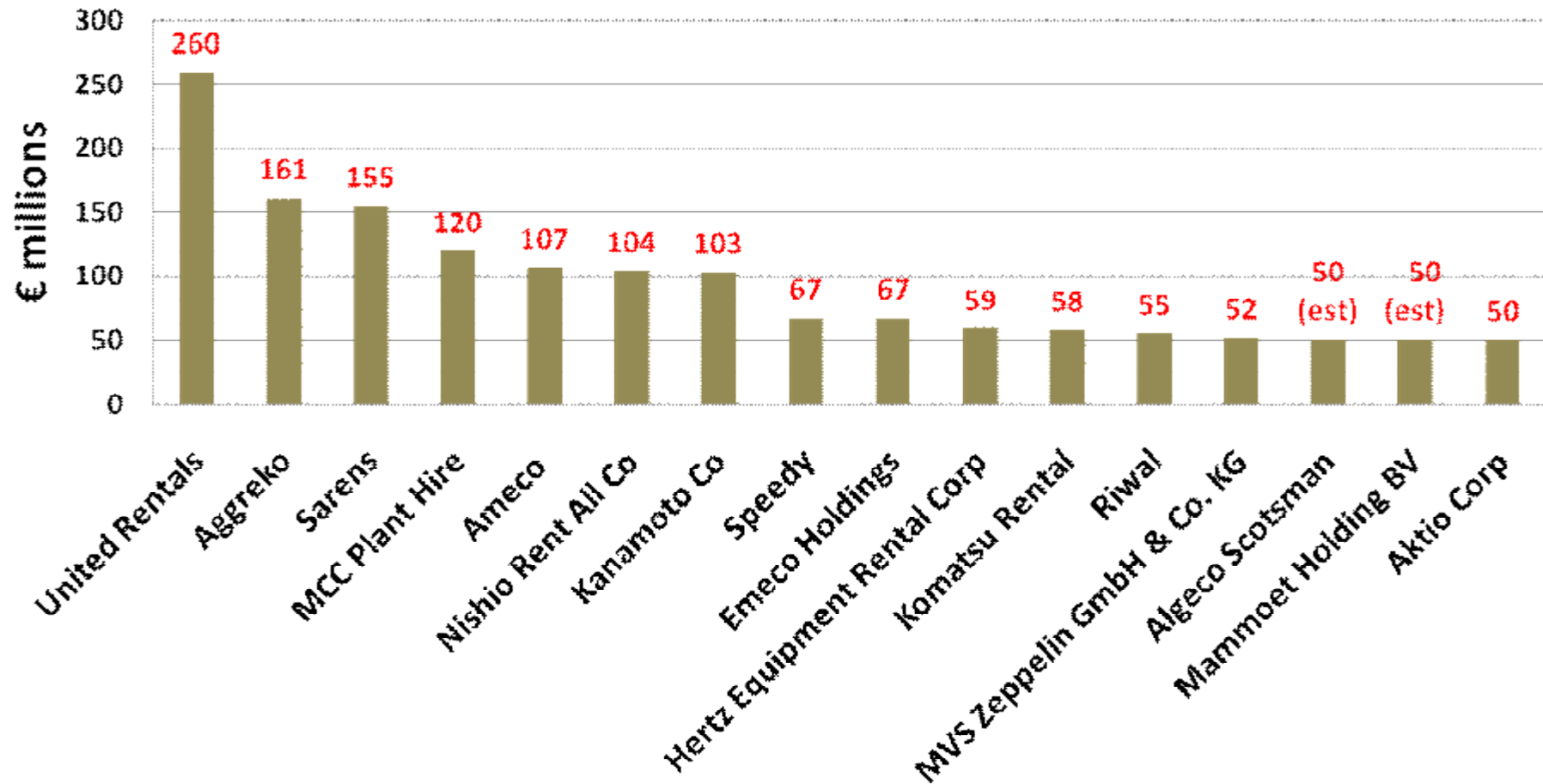
Revenues: Top 15 in 2009



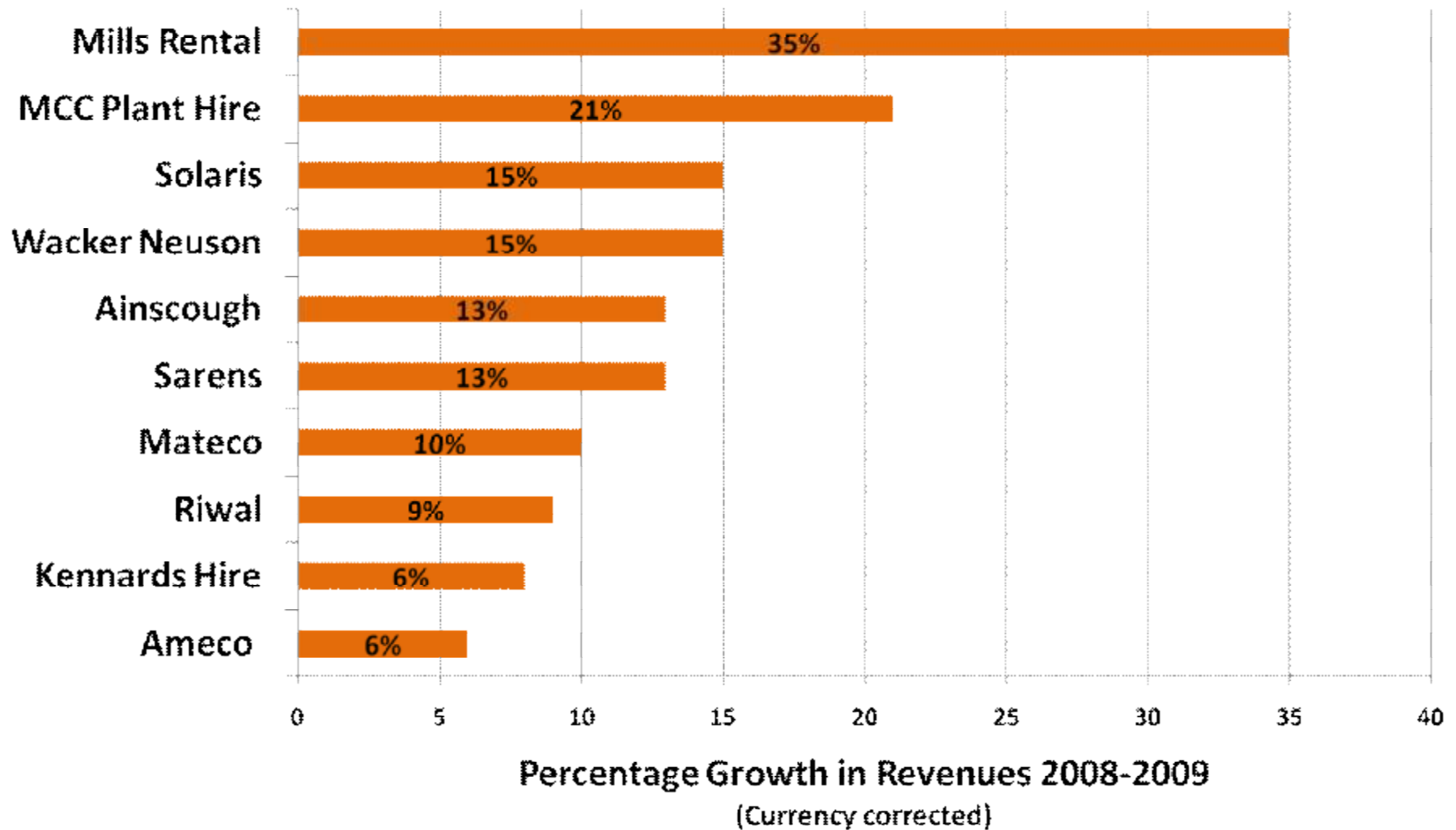
IRN-100: Capital Expenditure Trends



Top 15 Spenders Fleet CapEx in 2009



Fastest Growing Companies



New Entrants to the IRN-100

Ranking & Company	2009 Revenues (€m)	
Hewden	€158	Formerly part of Finning International
Mills Rental	€120	Brazilian renter of aerial platforms, formwork and shoring equipment.
Solaris	€77	Brazilian renter of aerial platforms and telehandlers.
Godwin Pumps	€70-105m	US/UK pump manufacturer. Has large pump rental business in US.
Touax	€69m	French renter of mobile accommodation



ERA/IRN RentalTracker



RentalTracker survey

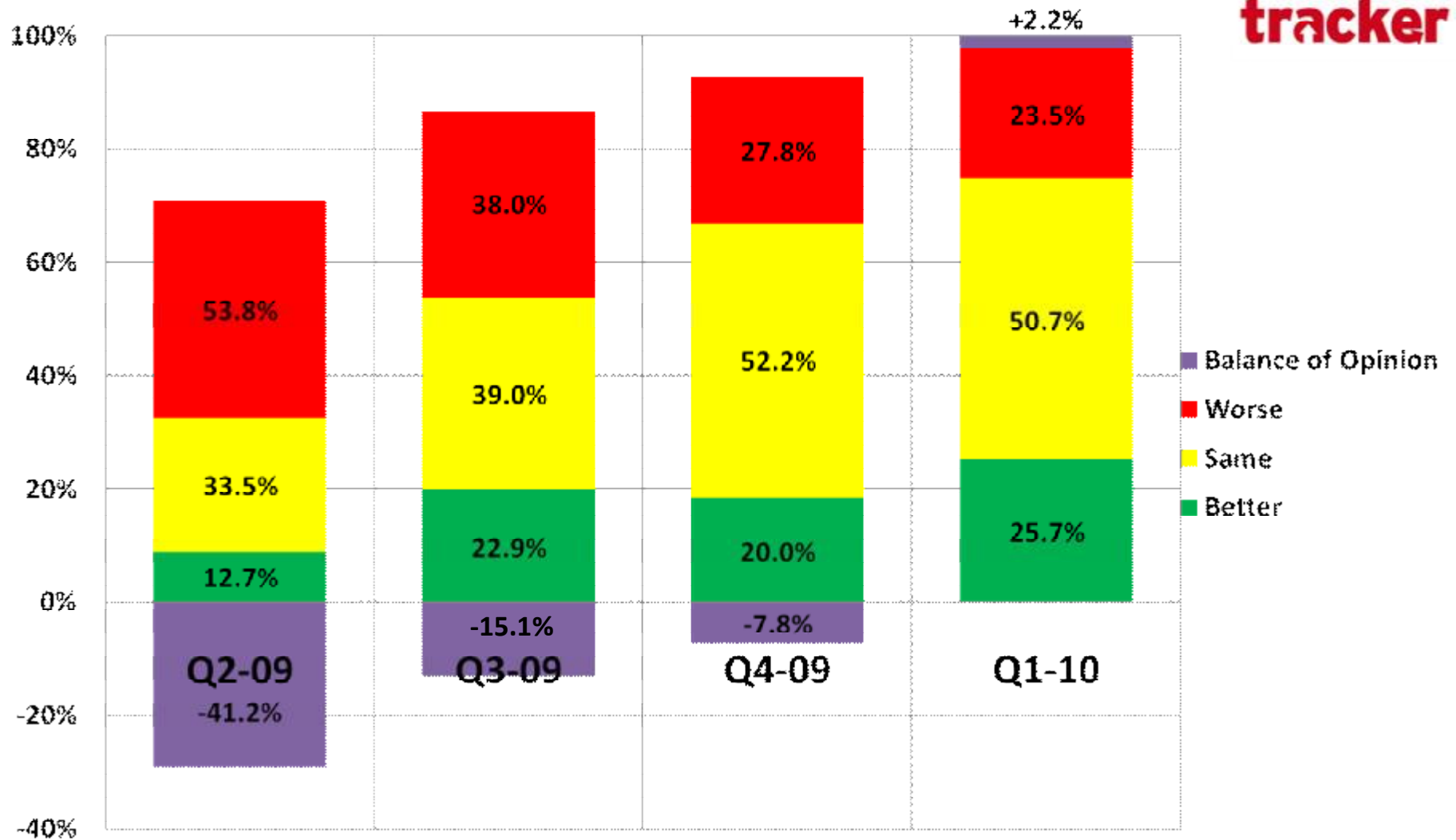
- Joint venture between IRN and ERA.
- First survey in June 2009 for Q2 2009. Have now completed four surveys.
- Between 240 and 120 companies have responded to the survey.
- Companies in Europe only surveyed.
- www.khl.com/rentaltracker



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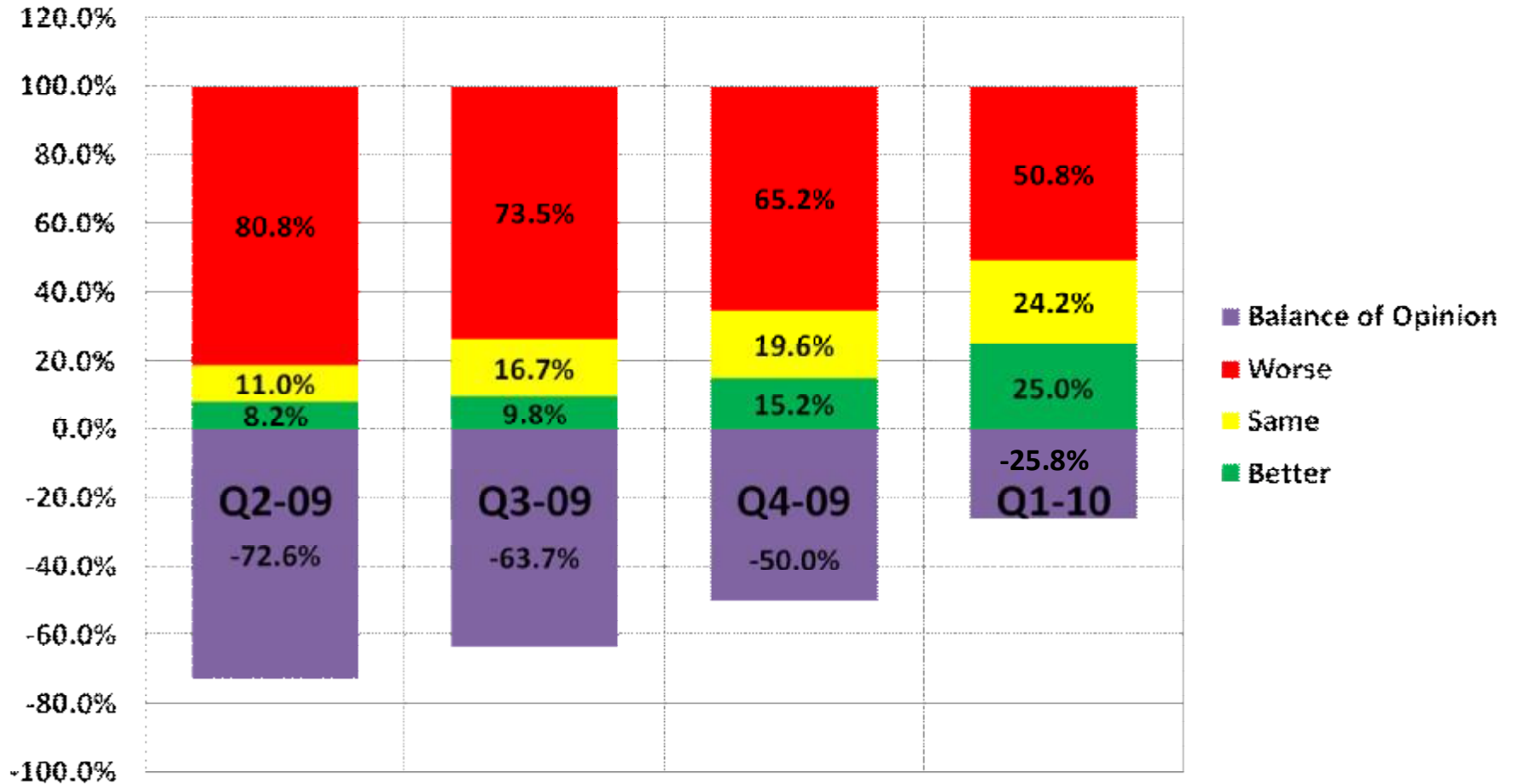
Business Conditions Now

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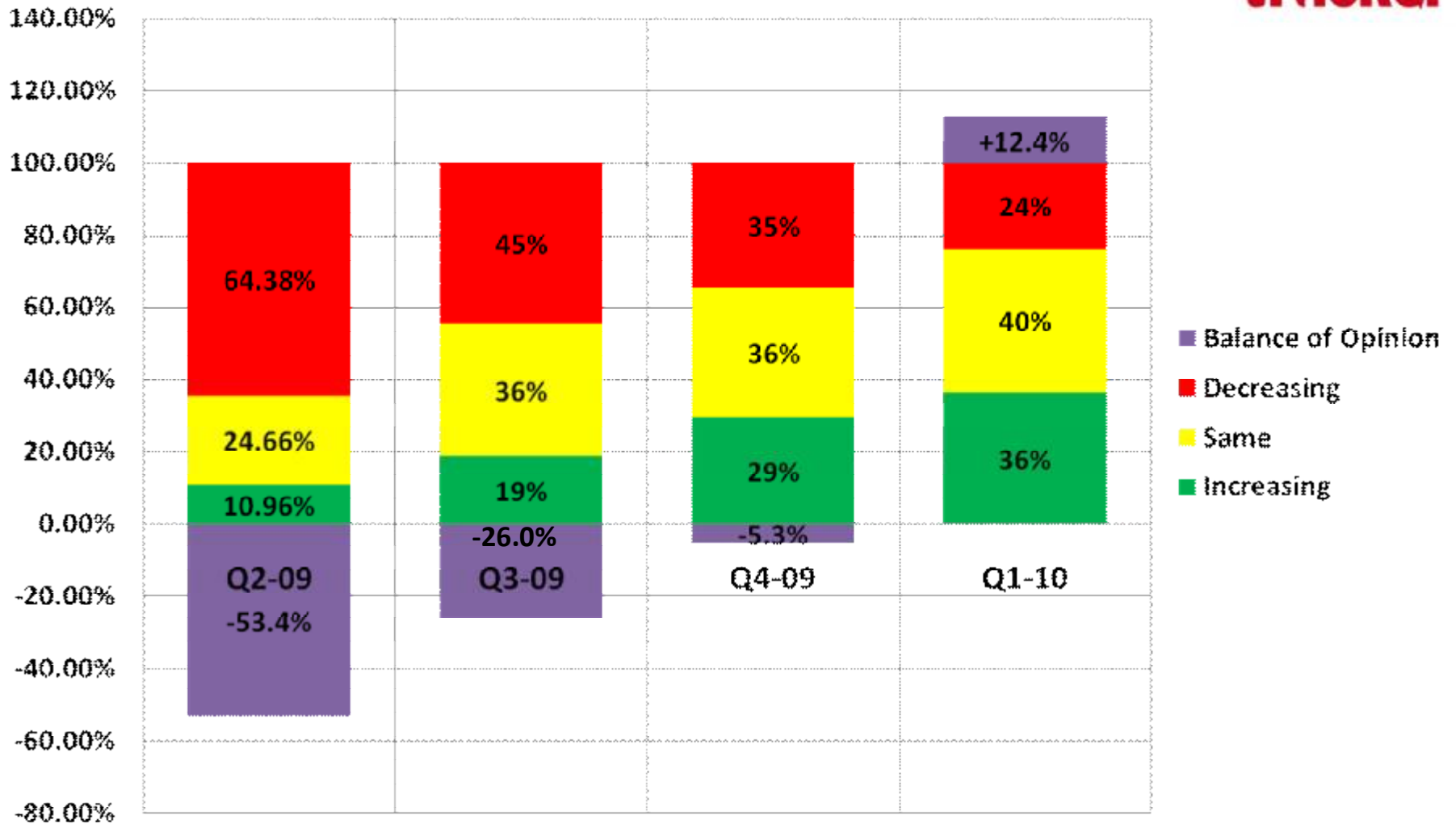


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Business Levels Compared to Same Quarter a Year Ago

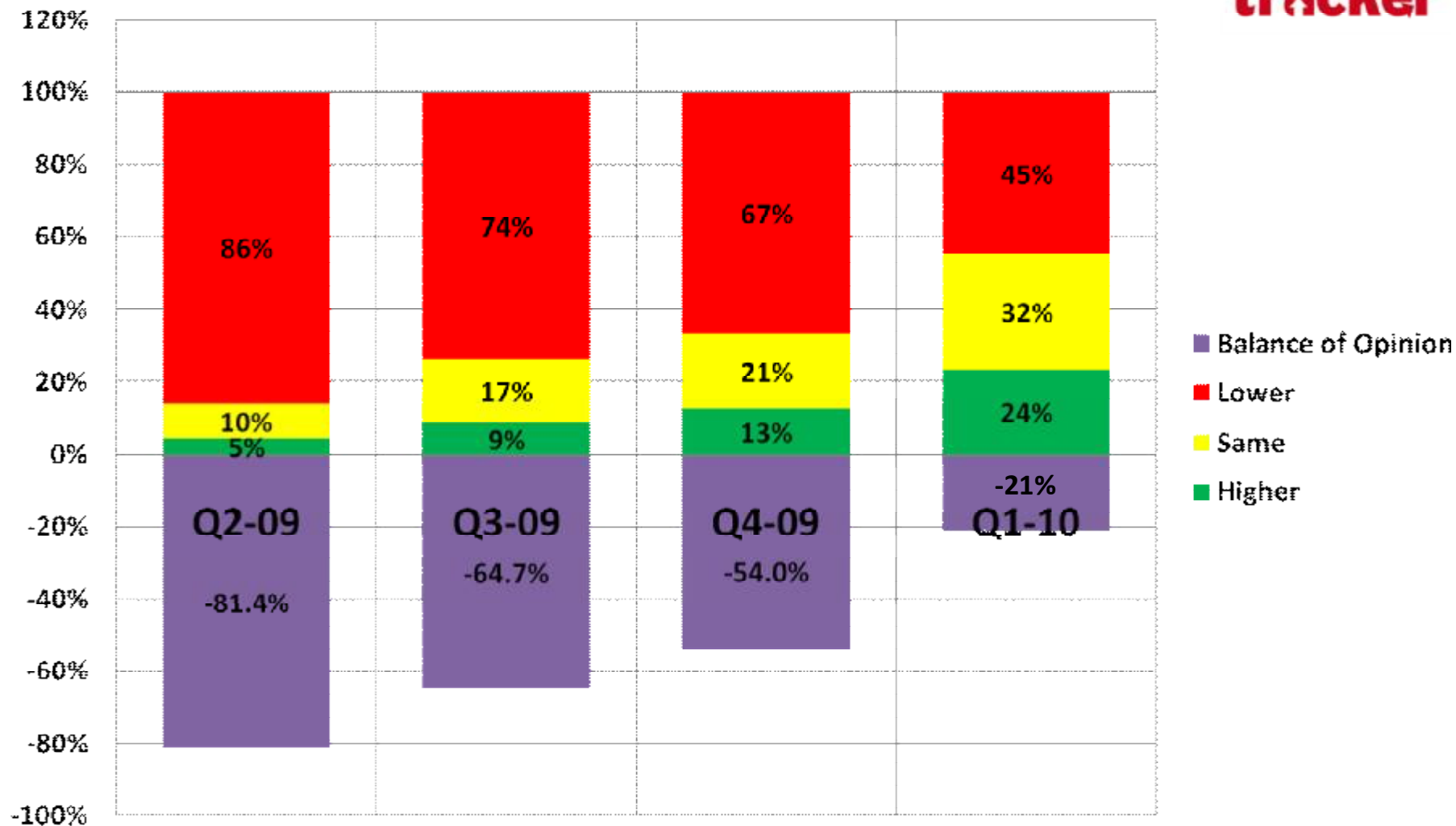


Time Utilisation Trend



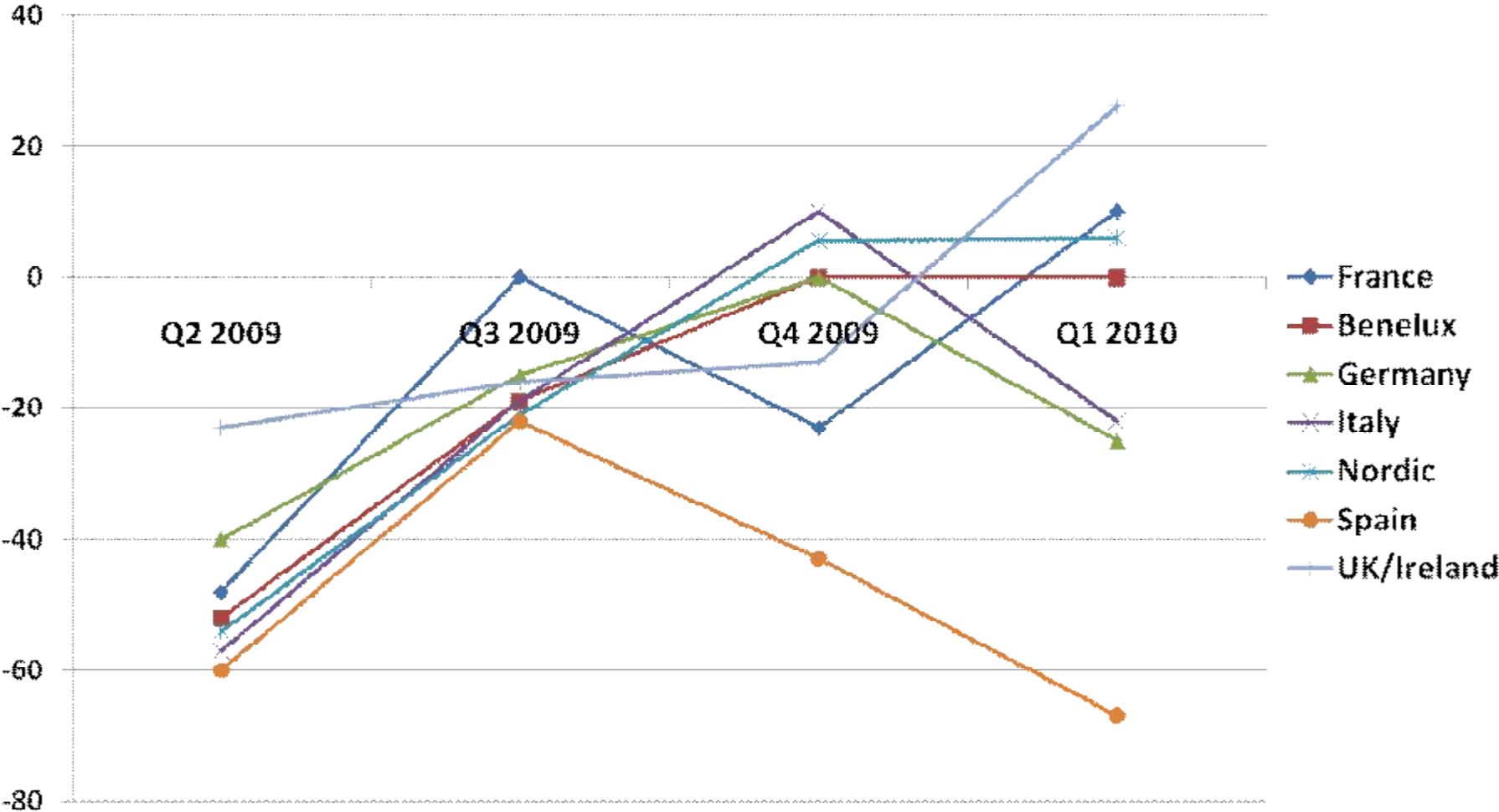
Fleet Investment This Year

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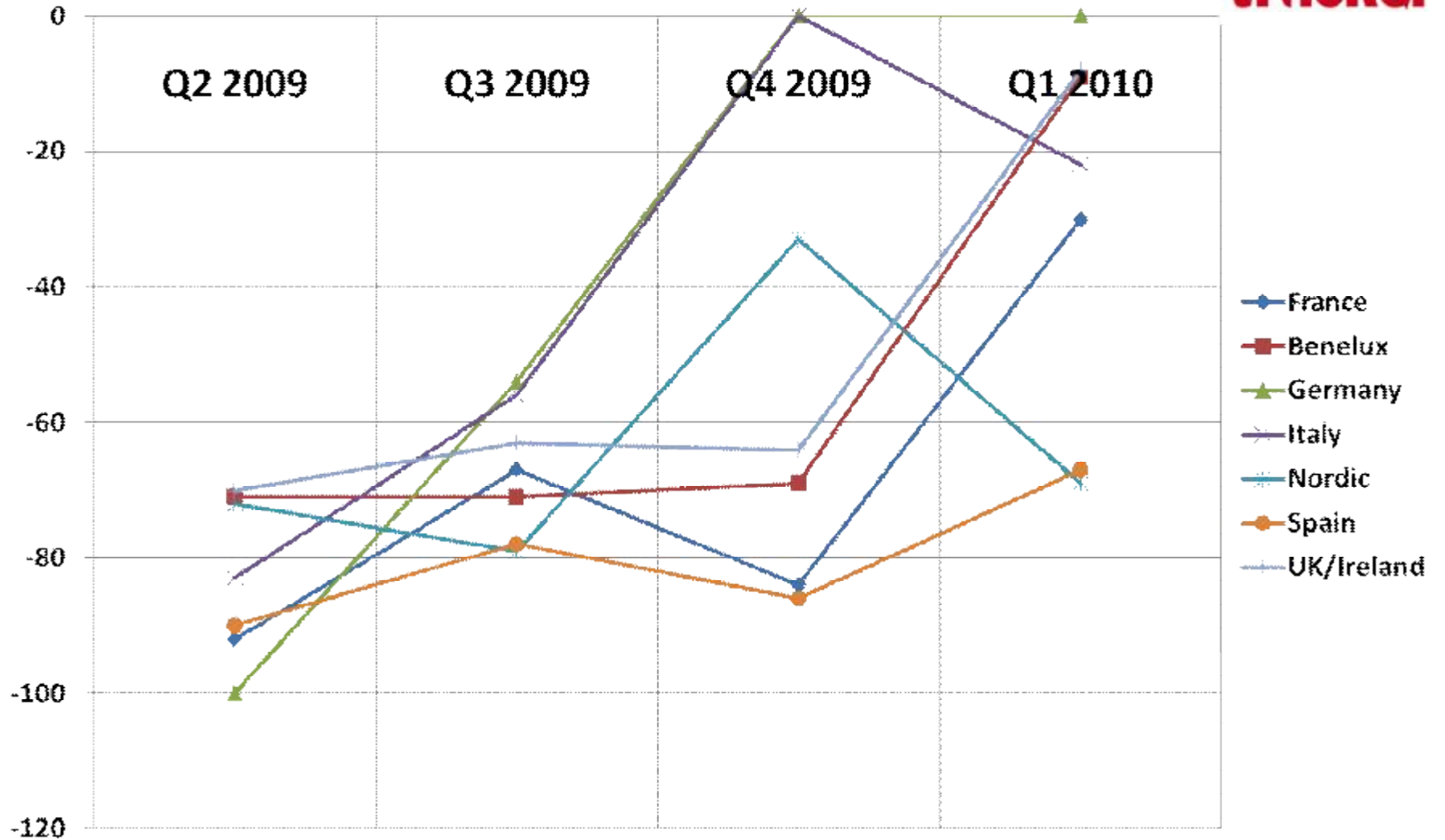


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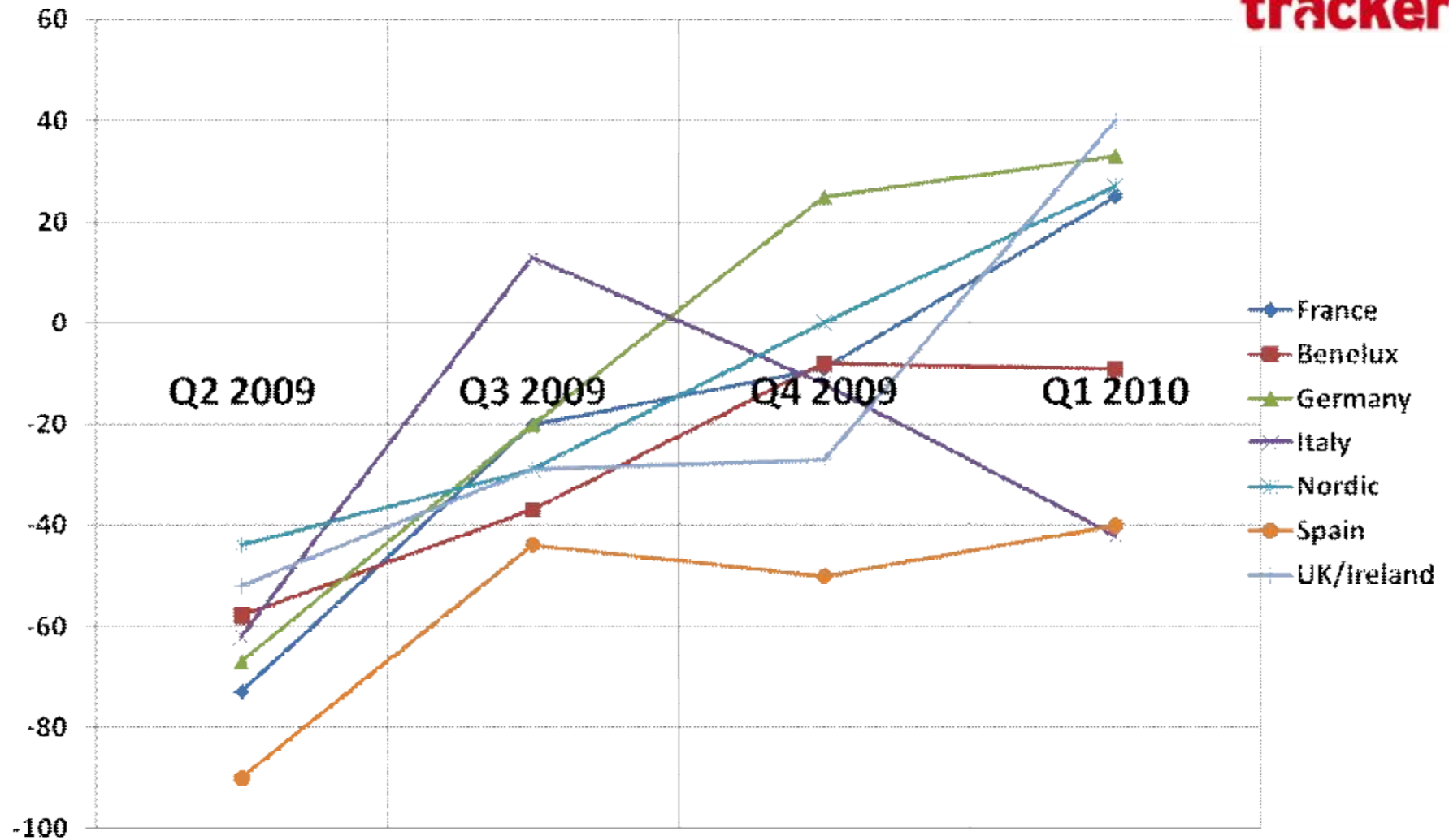
Business Conditions Now



Conditions Compared to One Year Ago



Time Utilisation Trends



Thank you

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