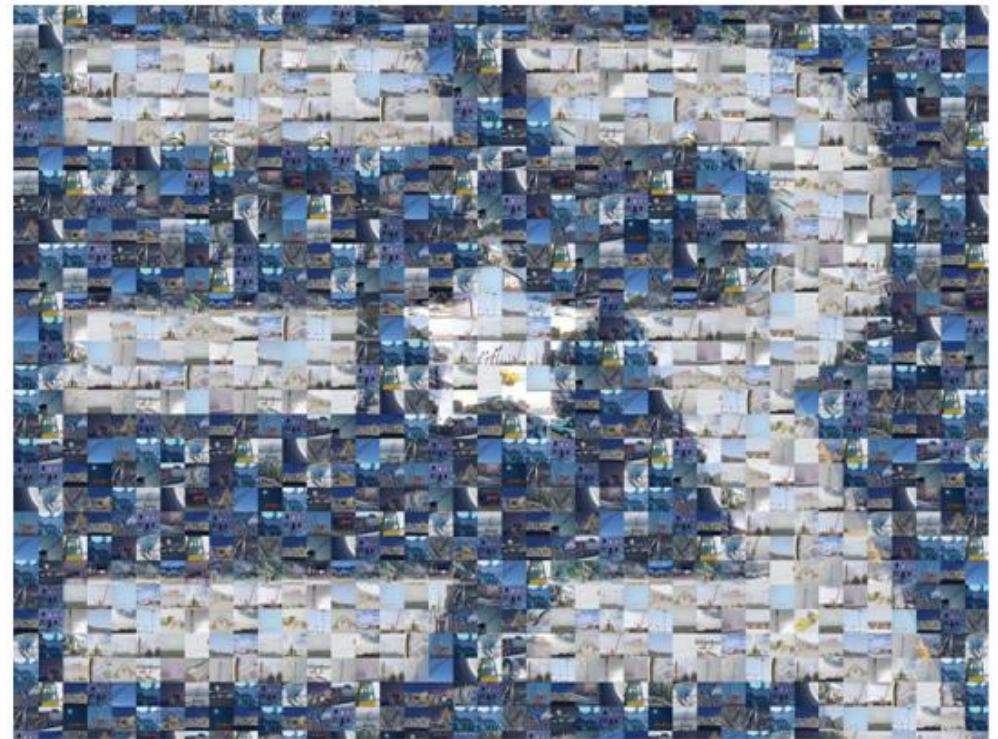


ERA Convention 2010

“New Opportunities for Rental”

**Addressing Different
Markets**

**Phil Wolff, Commercial
Director,
HSS**



WWW.ERARENTAL.ORG



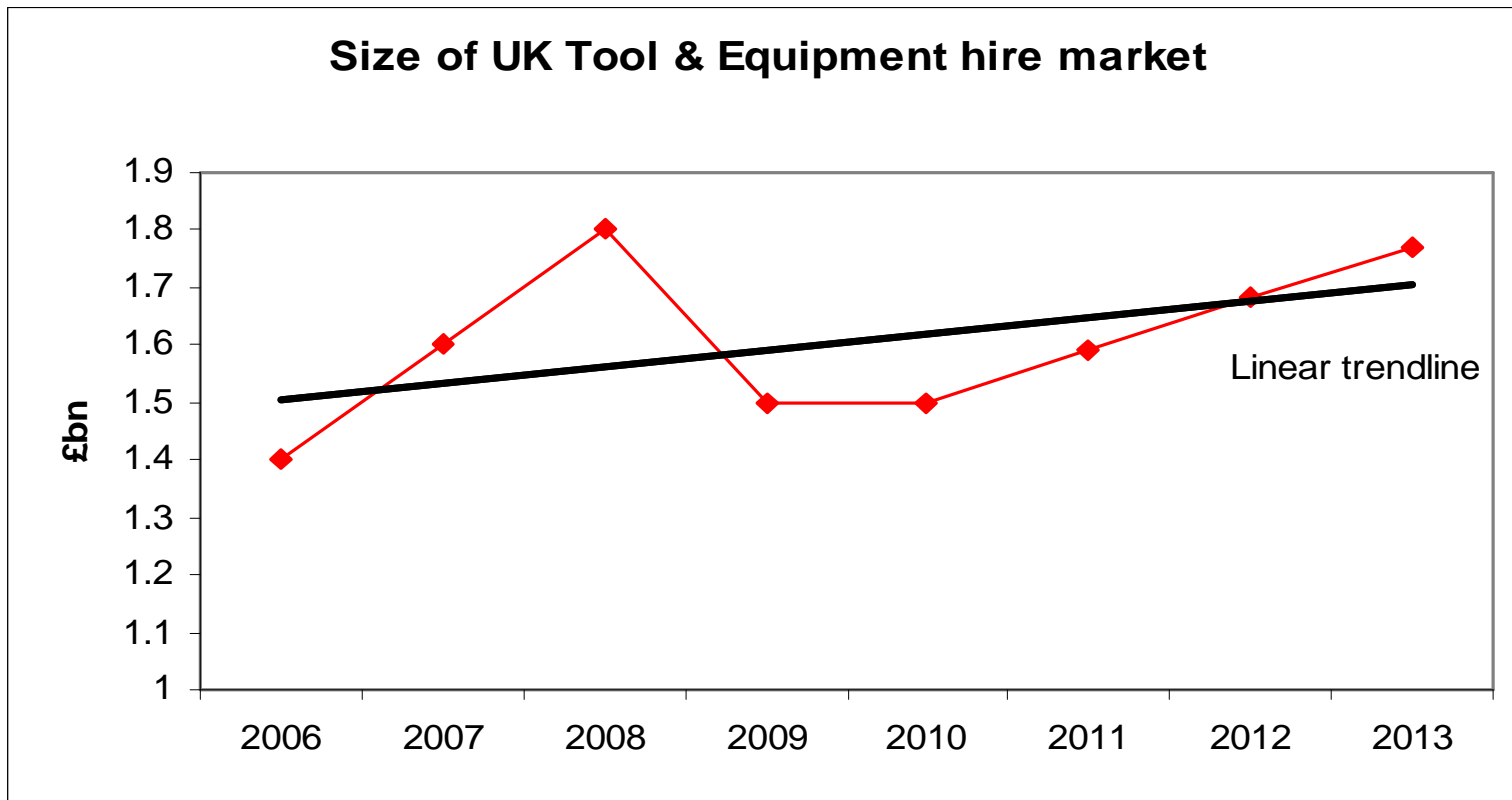
Western Europe

	Germany	Denmark	Spain	Finland	France	Italy	Sweden	UK	Total Western Europe
Estimated Penetration ⁽¹⁾	10.0%	26.3%	31.7%	40.3%	18.2%	11.3%	36.6%	62.3%	24.4%
Key market players	Loxam MVS Zeppelin Boels	Cramo	GAM Loxam Hune Rentecnika	Cramo Ramirent	Loxam Kiloutou	HSS Nacanco	Cramo	Ashtead Speedy Aggreko HSS Hewden	

Notes:

1. Defined as sales of equipment to rental companies in market as a % of total sales in market (Source The European Rental Industry 2008 Report)

UK market size and forecast



Source: EHN, HSS Management

What is driving purchasing in the UK?

- n Concern over cost
- n Health & Safety agenda
- n Legislation
- n Service capability
 - n Network
 - n Equipment quality
 - n People
 - n Pricing transparency
 - n Value-added services
 - n One-stop supply management

Some other concerns

- n Volume procurement
 - n National deals
 - n Single source supply
 - n Competitive tendering
 - n E-procurement platforms
-



EUROPEAN
RENTAL
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Invest in value-added services



Focus on the true cost of hire

- n Work in partnership with customers to drive down:
 - n Cost of owning & maintaining equipment
 - n Volume of tools by site
 - n Duration of tools on hire
 - n Improving efficiency
- n Transparency & Control



What we have learned

- n Focus on customers not products
- n Hire is service not price driven
- n Work with customers to drive down true cost of hire