



**ALEEC**®

ASSOCIAÇÃO DE LOCADORAS

# BRAZILIAN RENTAL ASSOCIATION

**Established:  
1992**

## **SEGMENTS**

- **Construction**
- **Mining**
- **Industry**
- **Events**
- **Cleaning**
- **Cargo handling**
- **Concrete cutting and drilling services**

**IN THE ENTIRE COUNTRY.**

## OUR GOAL

**To reinforce the concept of rental in the market and to invest in constant training for the associates' teams.**

## OUR GOAL

Events organized by ALEC:



- Ceará
- Curitiba
- Porto Alegre
- Rio de Janeiro
- Ribeirão Preto
- São José dos Campos



# ASSOCIATED COMPANIES BY REGION



## WORKS DEVELOPED

**ALEC acts as technical support to the Standing Regional Committee in the preparation and review of the Brazilian Standards for Safety Equipment along with three sectors:**

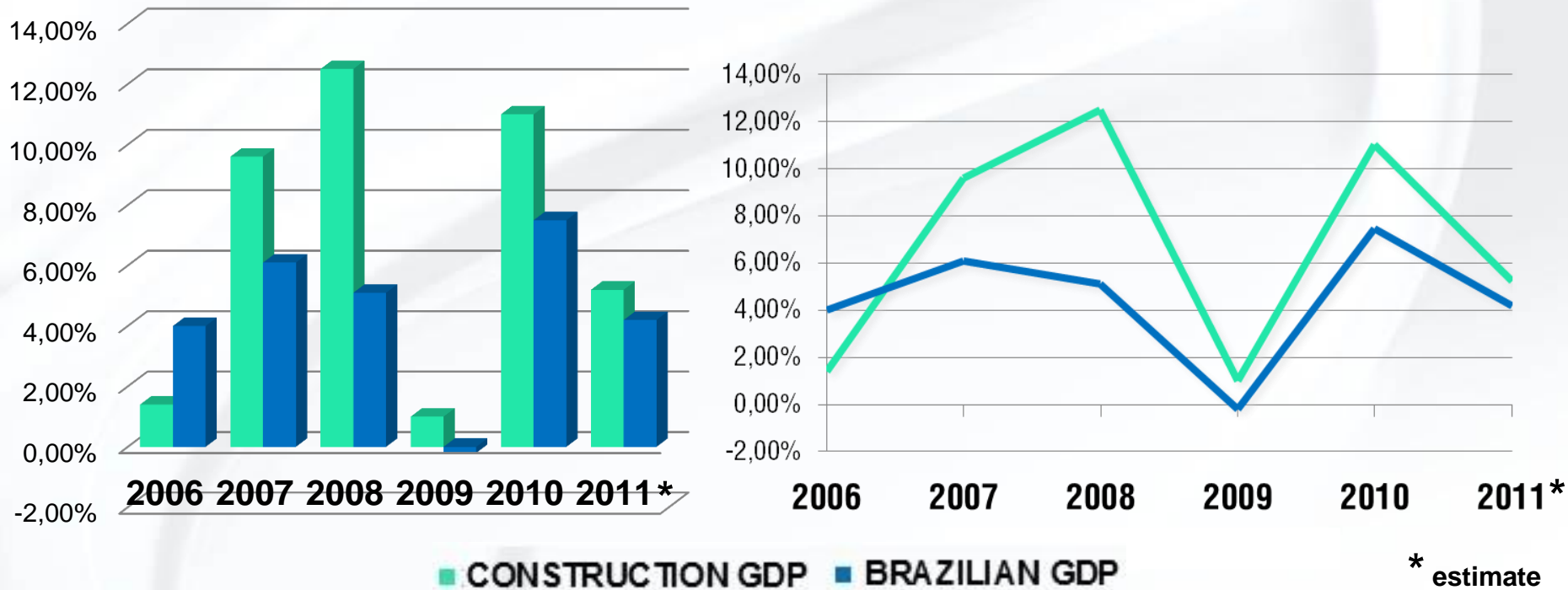
- **Government – Ministry of Labour and Fundacentro**
- **Workers Union – Feticon/SP**
- **Employers Unions: Sinduscon/SP and Secovi/SP**

**The Association also promotes training for employees of rental companies:**

- **Machine Maintenance**
- **Lectures on business management**
- **Lectures on security regarding equipment**
- **Lectures on rental value calculations**
- **Training for rental services salesmen**

# THE BRAZILIAN RENTAL MARKET

## CONSTRUCTION GDP X BRAZILIAN GDP

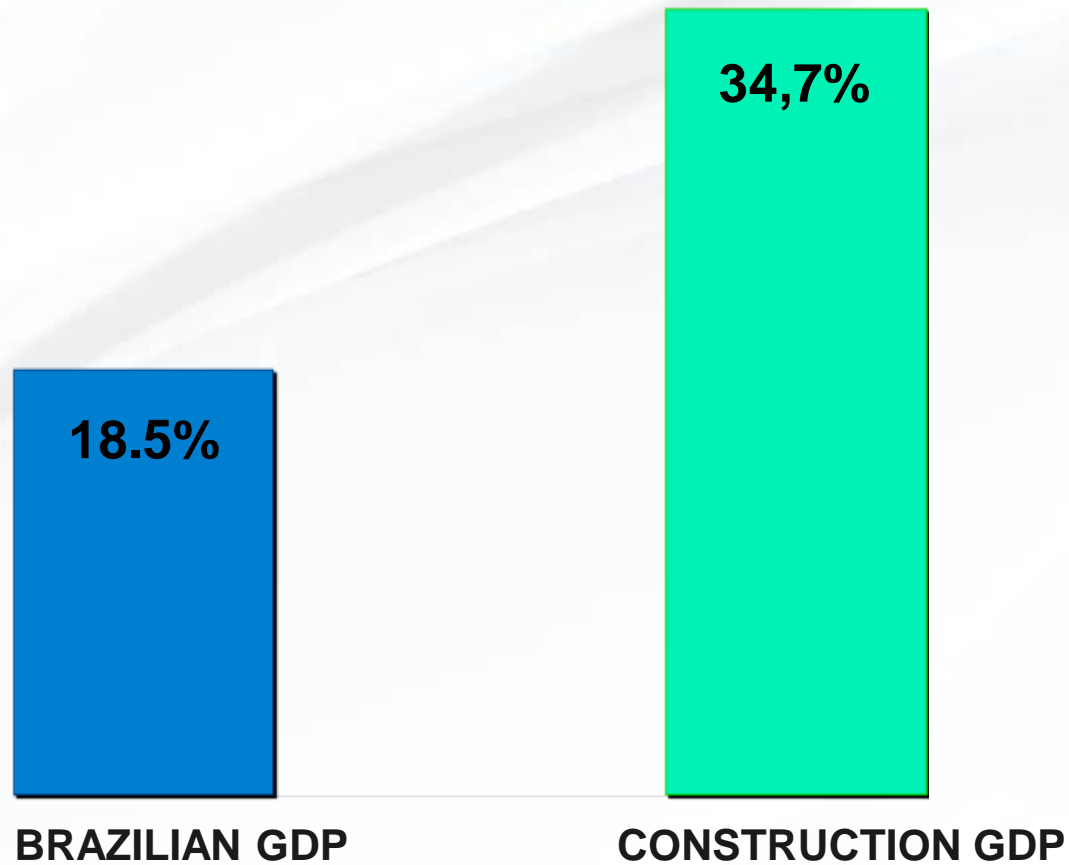


**2010 CONSTRUCTION GDP (GVA): US\$ 103.280 million**

**2010 BRAZILIAN GDP (GVA): US\$ 1.959.776 million**

# THE BRAZILIAN RENTAL MARKET

ACCUMULATED GDP 2007 TO 2010





# THE BRAZILIAN RENTAL MARKET

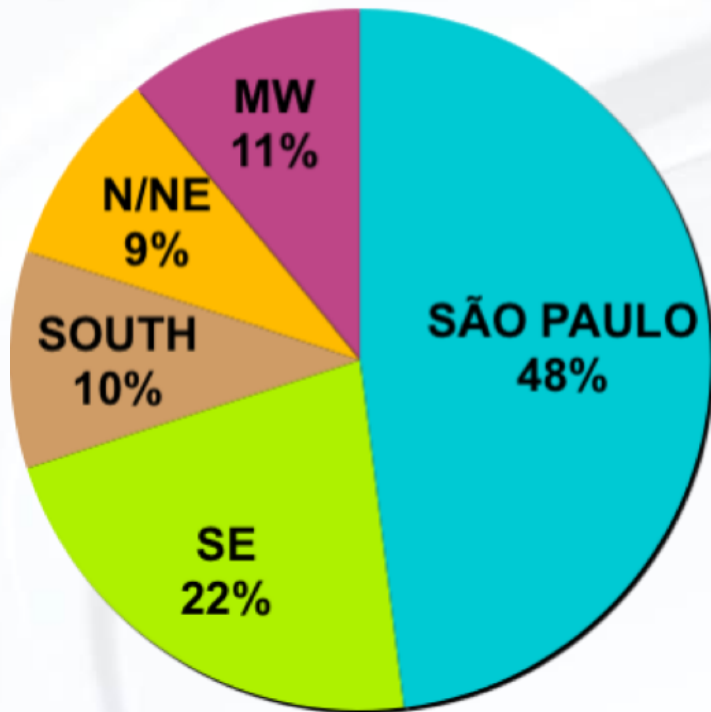
## BRAZILIAN MARKET ASSESSMENT - RENTAL x END CLIENT Soil compaction - light machinery

	Brands on the market	Amount of rental companies	% billed to the end client	% billed to companies
until 1980	4	8	99%	1%
1980-1990	4	45	85%	15%
1990-2000	8	700	50%	50%
2000-2009	15	1160	15%	85%

# THE BRAZILIAN RENTAL MARKET

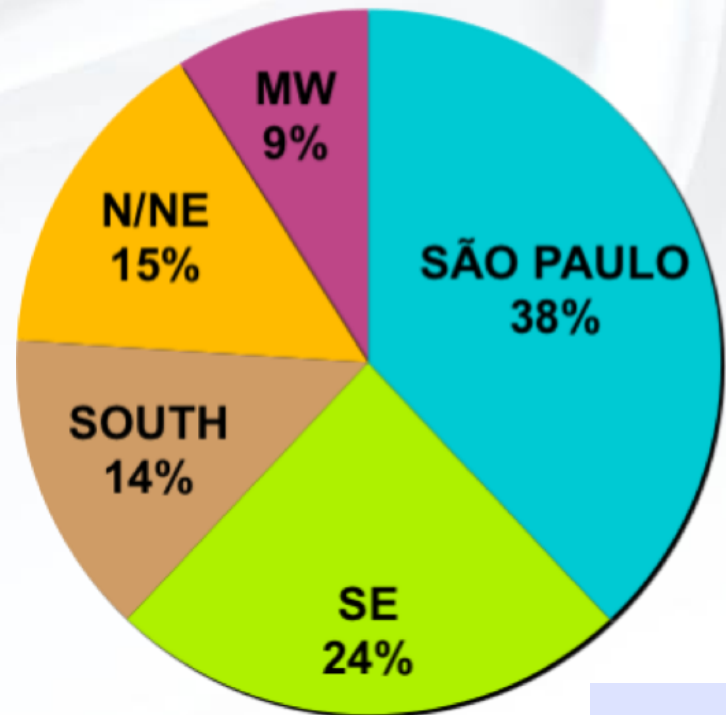
## REGIONAL DISTRIBUTION

2008 Research: 1850 companies



Source: Florenzano Marketing 2008

2010 Research: 2400 companies

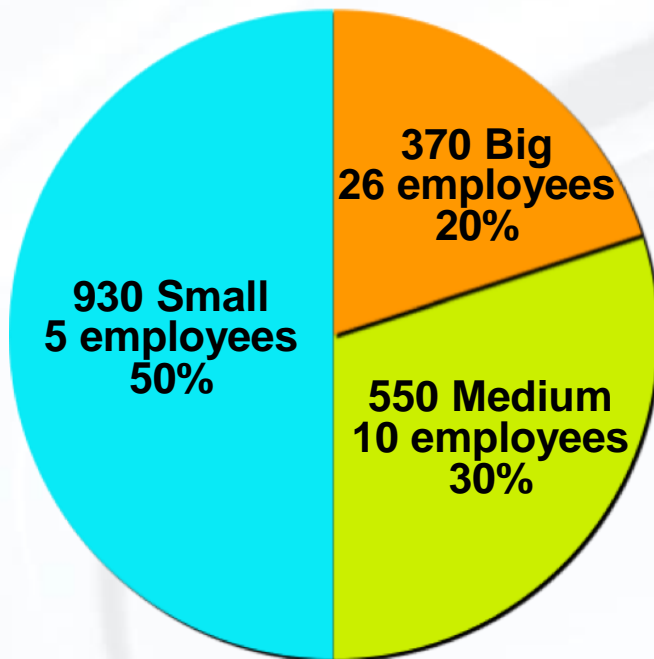


Source: Florenzano Marketing 2010

# THE BRAZILIAN RENTAL MARKET

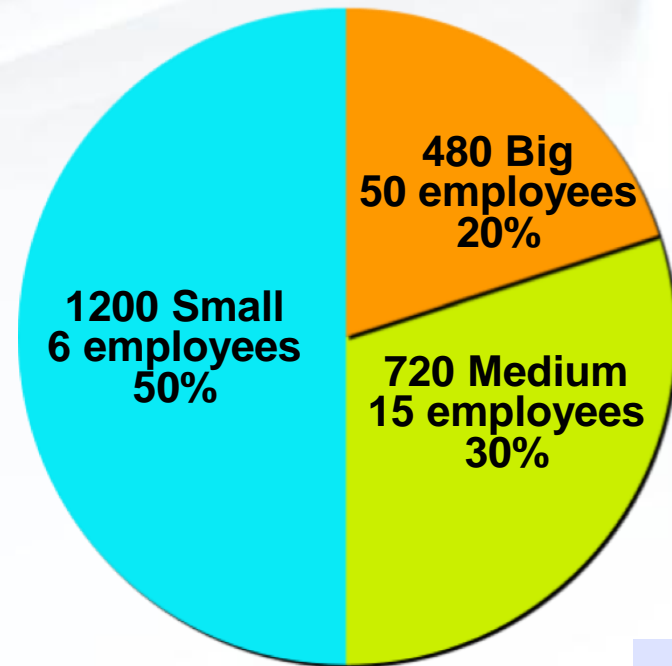
## COMPANY SIZES AND NUMBER OF EMPLOYEES

2008 Research: 1850 companies  
Total Employees= 20.000



Source: Florenzano Marketing 2008

2010 Research: 2400 companies  
Total Employees= 42.000



Source: Florenzano Marketing 2010

## 10 LARGEST MEGA PROJECTS UNDER WAY IN BRAZIL

PROJECT	STATE	INVESTMENT IN US\$
Premium I Refinery	MA	26,8 bi
High Speed Train	SP/RJ	23,3 bi
Abreu e Lima General Refinery	PE	15,3 bi
Integrated Petrochemical Complex (Comperj)	RJ	13,0 bi
Belo Monte Hydroelectric	PA	10,6 bi
Santo Antônio Hydroelectric	RO	7,3 bi
Jirau Hydroelectric	RO	6,1 bi
Angra 3 Nuclear Plant	RJ	5,6 bi
Fourth Subway Line in São Paulo	SP	3,6 bi
P-55 Oil Platform	PE/RS	3,4 bi

**Total: US\$ 115 billion**