

Specialty Rental Services



Capital Market Day 2006

Geert Follens, President Portable Air



Content



- CT specialty rental business in brief
- Multi-Brand rental business
- Rental products and applications
- Rental support tools
- Industrial rental market
- Summary

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CT Rental Service – Products



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Capital Market Data – December 31, 2019

CT Rental Service – Energy Customers



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Capital Market Data – December 31, 2019

CT Rental Service – Market Position

- World market leader in industrial rental business in compressed air solutions
- Specialist in oil-free and high pressure air application segments
- Global coverage with independent & customer center rental companies
- Advanced capabilities for international rental projects
- Dominant use of Atlas Copco products
- Strong profitable growth based on 'customer value added' strategy



Global Market Data – December 4th, 2009

CT Rental Service – Environmental

Quality – Environment – Health & Safety

- Triple Certification for all CT Rental companies
World Wide by mid 2007
- ISO9001: 2000
ISO14001
OHSAS18001



Global Market Data – December 4th, 2009

First in Mind—First in Choice™



It is our **VISION** to be the market leader
in the specialized compressor rental business,
focusing on
oil-free air and high pressure rental applications.



Mission

- We can offer our customers the best and most efficient rental equipment based on:
 - Atlas Copco products
 - Product and application knowledge
 - Development of package solutions for niche applications
 - Well-trained product and service specialists
 - Superior fleet availability and reliability
- Our customers will recognize us as their first rental address
- We focus on our customers' needs and the use of the products



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Rental Brand Promise

« We are committed, 24/7, to fulfilling our customer's rental demands.

Our dedicated, talented and passionate people are empowered to provide our customers with premier products and innovative services.

We are the trusted partner every step of the way, delivering the loyal support our customers need to build the future.



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Strategic Focus Areas

Industrial Related Applications

Oil & Gas

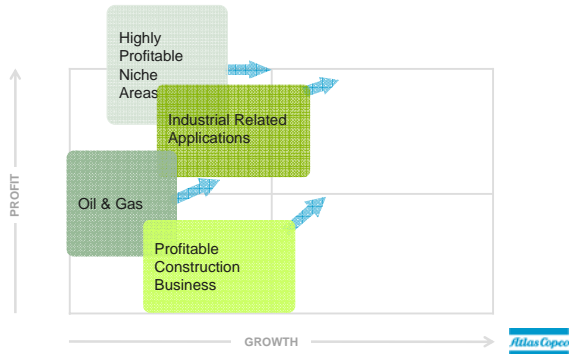
Highly Profitable Niche Areas

Profitable Construction Business



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Strategy: Organic and Strategic Growth



11 - Capital Market Days - December 4th, 2019

CT Rental Service – Performance Trends

- Revenues:
 - Doubled within the last four years including acquisitions
 - Acquisition growth is 20% of total
 - Integration of Prime
 - Size is around 10% of CT business
- ROCE: developing very positively
- Profitability: continuous improvement



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12 - Capital Market Days - December 4th, 2019

Content

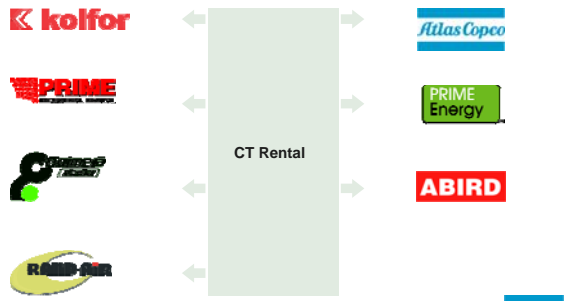


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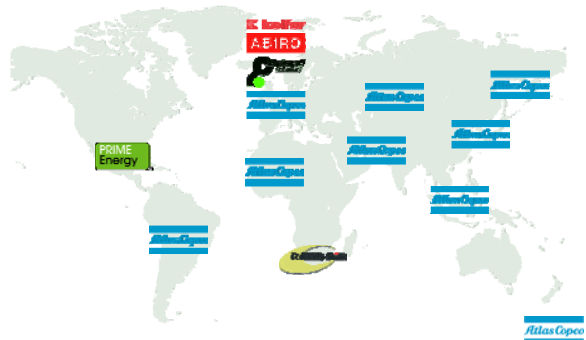
Multi-Brand Strategy

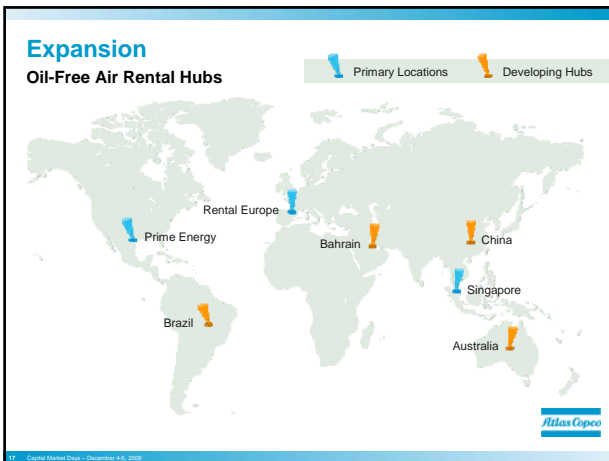


Multi-Brand Strategy

- Acquired companies kept the established brand name
- Different brands stand for different product offers
- Support for price management
- Companies within the Atlas Copco Group

CT Rental Service – Multi-Branding

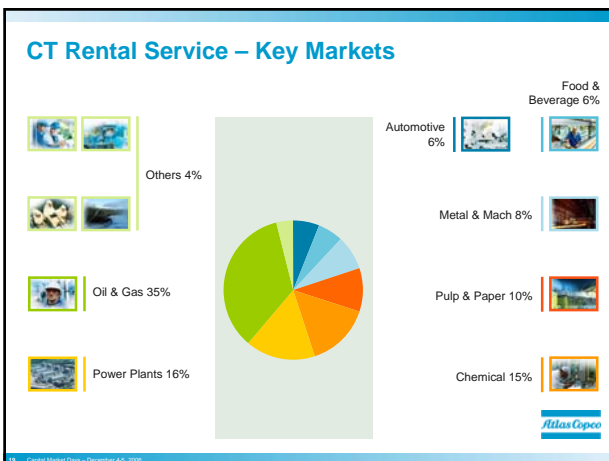




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CT Rental Service Core Business

Oil-Free Air

- Standard and high pressure compressors & dryers
- Diesel and electrical driven units
- High pressure off-shore units
- PET high pressure units
- VSD compressors with integrated dryers
- Aftercoolers, hoses, external fuel tanks



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CT Rental Service Core Business

Oil Injected Air

- Standard pressure compressors
- High pressure compressors: 25 and 30 bar
- Twin Air
- Aftercoolers, hoses, external fuel tanks



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CT Rental Service Core Business

GenSets < 500kVA

- Portable machines
- Containerized units



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CT Rental Service

- Rental growth is expected to outpace general economic growth
- Dynamics of the market
 - NES was sold to Diamond Castle
 - Sunbelt acquired Nation Rents
 - Aggreko acquired GE Energy Rentals
 - Atlas Copco divested RSC
- Focus areas are
 - Fleet management
 - Price management
 - Extend the products and services offer
 - Geographic growth – focused markets

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Top Opportunity Areas and Countries for Industrial Rental Business in 2007



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CT Rental Service – Summary

- Strong and profitable growth in the coming years
- Core business focus on compressed air
- Main strategic focus on industrial and oil & gas rental business
- Increasing the use of Atlas Copco products
- Value added development for our customers



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**We are committed to your
superior productivity through
interaction and innovation.**



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