

# 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

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## CT Rental Service – Energy Customers



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Capital Market Data – December 31, 2019

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## 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 4<sup>th</sup>, 2009

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## 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 4<sup>th</sup>, 2009

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## 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.



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## 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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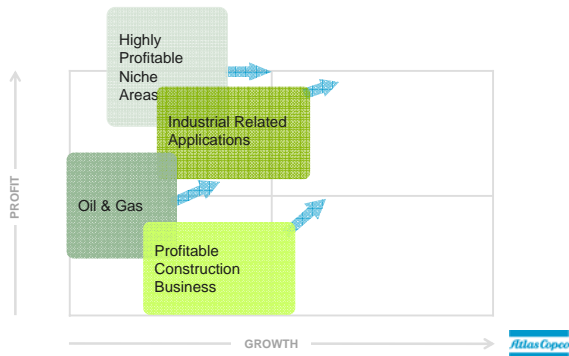
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## Strategy: Organic and Strategic Growth



11 - Capital Market Days - December 4th, 2009

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## 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, 2009

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13 - Capital Market Days - December 4th, 2009

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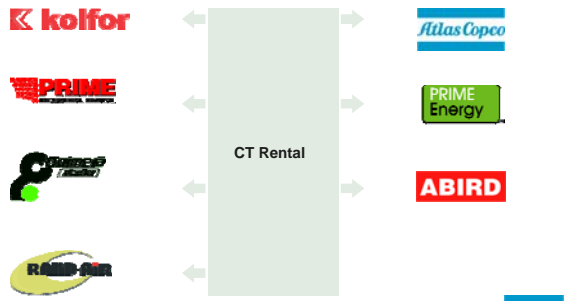
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## Multi-Brand Strategy



14 - Capital Market Days - December 4<sup>th</sup>, 2009

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## 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

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15 - Capital Market Days - December 4<sup>th</sup>, 2009

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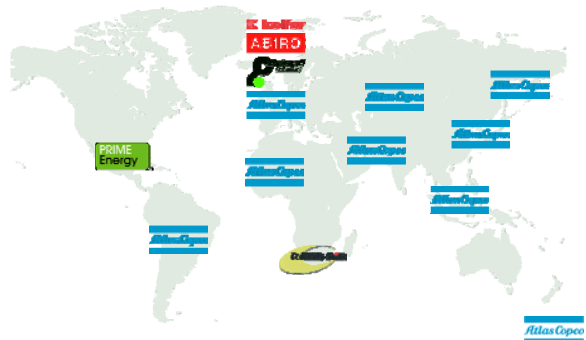
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## CT Rental Service – Multi-Branding



16 - Capital Market Days - December 4<sup>th</sup>, 2009

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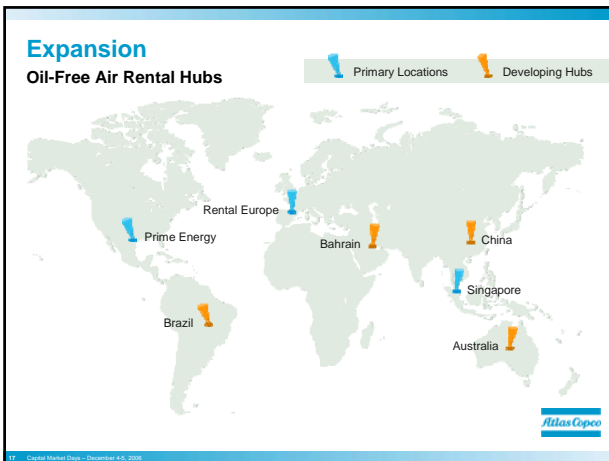
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18 - Global Market Data - December 31, 2009

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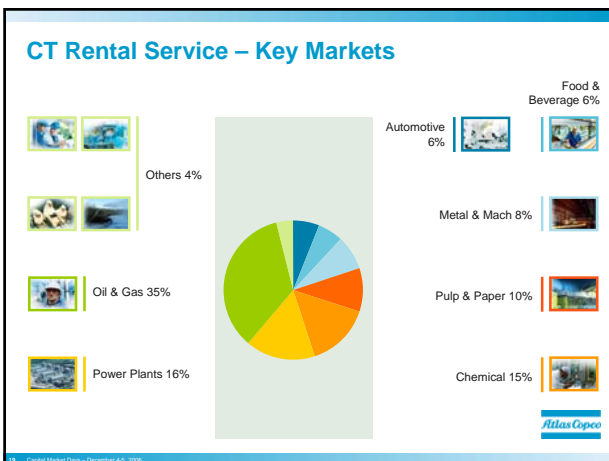
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## CT Rental Service Core Business

### 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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20 - Capital Market Days - December 4<sup>th</sup>, 2009

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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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21 - Capital Market Days - December 4<sup>th</sup>, 2009

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## CT Rental Service Core Business

### GenSets < 500kVA

- Portable machines
- Containerized units



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22 - Capital Market Days - December 4<sup>th</sup>, 2009

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## CT Rental Service – Main Competitors

Aggreko,  
USA and Europe

**aggreko**  
The power of design powered

Cat Rental,  
USA

**CAT Rental**

Stewart &  
Stevenson



Many  
regional  
small  
niche players

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27 Global Market Data – December 4th, 2009

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## CT Rental Service

**Atlas Copco FuelXpert™**  
Makes the impossible possible



Average 10% better fuel consumption  
than our best competitors

**THE BEST JUST GOT  
BETTER**

Atlas Copco has proven that the lowest fuel consumption when it comes to working in the field, will lead to the superior fuel cost savings to working globally. Fuel use has been 10% lower.

**NEW MODEL OF ENGINE**

Atlas Copco's new 1000 series engine, the 1000 series, is the most powerful engine in the world.

1000 series engine

1000 series engine

1000 series engine

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28 Global Market Data – December 4th, 2009

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### CT Rental Service

#### Atlas Copco Oiltronic™

Longer lasting air ends, lower operating temperature



#### Oil temperature control extending life of components

Oil temperature control is a key factor in extending the life of a compressor. A lower operating temperature results in less wear and tear on the components, leading to longer service life and lower operating costs. The Oiltronic system is designed to maintain optimal oil temperatures, ensuring maximum efficiency and reliability.

#### Reason is the savings of savings

When used in combination with the right tools and techniques, the Oiltronic system can significantly reduce energy consumption and operating costs. This is achieved by maintaining the optimal oil temperature, which improves the efficiency of the compressor and reduces the amount of energy required to operate it.

#### A technology solution

The Oiltronic system is a comprehensive solution for managing oil temperatures in compressors. It includes a range of sensors and control systems that monitor and adjust the oil temperature in real-time. This ensures that the compressor always operates at the optimal temperature, extending its life and reducing operating costs.

#### Oiltronic benefits

- Lower energy consumption
- Lower operating costs
- Longer service life
- Higher efficiency
- Reduced maintenance
- Improved reliability
- Lower emissions
- Better performance

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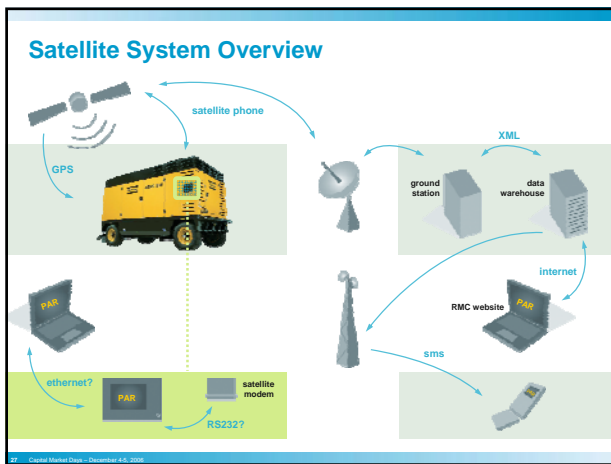
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## CT Rental Service

- 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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37 Capital Market Days – December 4-5, 2007

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## CT Rental Service

### Top Opportunity Areas and Countries for Industrial Rental Business in 2007



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38 Capital Market Days – December 4-5, 2007

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39 Capital Market Days – December 4-5, 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



22 – Capital Market Days – December 4<sup>th</sup>, 2009

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



23 – Capital Market Days – December 4<sup>th</sup>, 2009

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