

The Leader for Equipment Rental Industry Information



The 2007 *State of the Equipment Rental Industry* report is compiled by economic forecasting leader, Global Insight, for the American Rental Association (ARA) and *RENTAL MANAGEMENT* magazine. Assess the North American rental industry as a whole, with expanded information on the U.S. and Canada. To go one step further, the report also provides sector overviews with regional breakouts.

This report offers the only complete historical, current and future overview of the rental industry and it is unrivaled in both the scope and depth of its analysis of the underlying economic drivers shaping our industry today.



"This report is based on business principles, business practices and economic terms that owners have to pay attention to as a business to be successful. The strong economic perspective of this report states the dimension of the industry in terms that will attract those interested in rental careers, employment or investment in the industry. Everyone in the industry should take pride in the fact that we are building quite an industry. To me, the report represents the entire image of what this industry represents in North America. It's people, it's dollars and it's opportunity."



— Christine Wehrman,
executive vice president and CEO of ARA

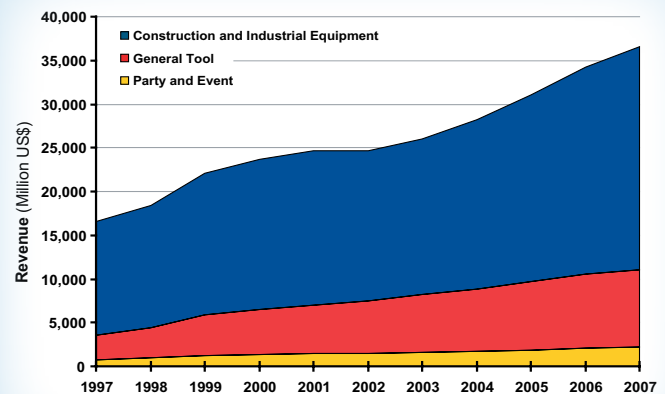
Key Findings:

- The total size of the North American rental market was US\$42.3 billion in 2007, including US\$36.5 billion in the United States and US\$5.8 billion in Canada.
- Global Insight forecasts a positive industry outlook and has projected North American rental revenue to exceed US\$52 billion in 2012.
- Continued growth expected for the United States, but at a slower compound annual growth rate (4.1 percent in the years 2007 – 2012).
- Construction and Industrial equipment revenue was more than US\$25.5 billion for the U.S. in 2007; the Canadian market totaled US\$4.3 billion in 2007.
- General Tool rental has been the fastest growing U.S. market segment during the past decade, with 11.6 percent compound annual growth from 1998 to 2007. It accounted for US\$8.8 billion in rental revenue in 2007. Canada's General Tool sector produced US\$1.4 billion in revenues in 2007.
- U.S. party and event rental revenue reached US\$2.2 billion in 2007 and will be the strongest performing segment during the forecast period. Canada's party and event rental revenue totaled US\$157 million in 2007.
- Canada shows the strongest growth, particularly in the Western provinces.

Global Insight estimates that there was robust growth in investment in 2007, increasing nearly 5.4 percent to an estimated US\$11.7 billion.

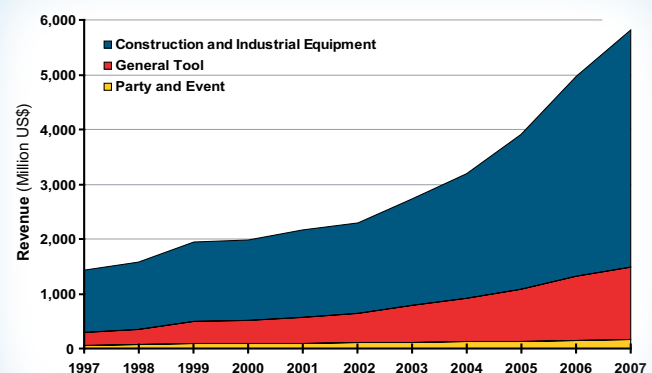
*2007 State of the Equipment Rental Industry report

Rental industry revenue in the U.S.



(Sources: U.S. Economic Census and Global Insight)

Rental industry revenue in Canada



(Source: Global Insight)

The full 160-page report is expanded and now includes statistical information for the three industry sectors of the equipment rental market – Construction and Industrial, General Tool and Party and Event for both the U.S. and Canadian markets. The report, commissioned by ARA and *RENTAL MANAGEMENT* magazine is available to ARA members for US\$695 and to prospective and nonmembers for US\$2,995. For copies, please contact American Rental Association at 1900 19th St., Moline, IL 61265 or by fax at (309) 764-1533 or by phone at (800) 334-2177, ext. 245.