Tower Crane Rental Industry
In China

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Hongji Rental
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Overviews of TC Rental Industry

Late launched
Overviews of TC Rental Industry

- Great quantities
- Fast development

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantity of owned-equipment (hundred thousands)</th>
<th>Total power (million KWS)</th>
<th>Net worth (billion RMB)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>100,000</td>
<td>100,000</td>
<td>50,000</td>
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<tr>
<td>2007</td>
<td>150,000</td>
<td>150,000</td>
<td>75,000</td>
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<tr>
<td>2008</td>
<td>200,000</td>
<td>200,000</td>
<td>100,000</td>
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<tr>
<td>2009</td>
<td>250,000</td>
<td>250,000</td>
<td>125,000</td>
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<tr>
<td>2010</td>
<td>300,000</td>
<td>300,000</td>
<td>150,000</td>
</tr>
</tbody>
</table>

Source: NBS, China
Overviews of TC Rental Industry

- Small Scale

Beijing Market

- Less than 5pcs: 5%
- less than 10pcs: 35%
- More than 50pcs: 60%
Overviews of TC Rental Industry

Main stream - Wet Rental

- Program
- Equipment & Maintenance
- Operator

Wet Rental
Overviews of TC Rental Industry

Self-discipline

- Obey the laws
- Follow the regulations
- Qualified services
- Assertion of benefits
Development of TC Rental Enterprises

The rise of private enterprises

Proportion of enterprises in 13 provinces

- Private enterprises: 86%
- State-owned: 8%
- Others: 6%

Proportion in top 50 2012

- Private enterprises: 66%
- State-owned: 8%
- Joint-ventures: 26%

Source: CMAL, China
Development of TC Rental Enterprises

- The rise of private enterprises
Development of TC Rentsl Enterprises

Focus on management

- Info system
- Maintenance
- Innovation

- Best solution
- Immediate response
- Communication

- Equipment & Technology

- HR

- Certificate
- Training

- Services

- Inspection
- Training
- Case study

- Safety
Development of TC Rental Enterprises

Preference of TC purchase

- Brands
- Performance
- Human-based
Trend of Rental Industry

- Brand recognition
- Industry integration
- Lack of skilled workers
- Lack of experience
- Urbanization
- Gov. investment
- Marketization
- Financial crisis
- Domestic real estate