

## **nxtMOVE's Client was in active negotiations with Company A for distribution and branding rights**

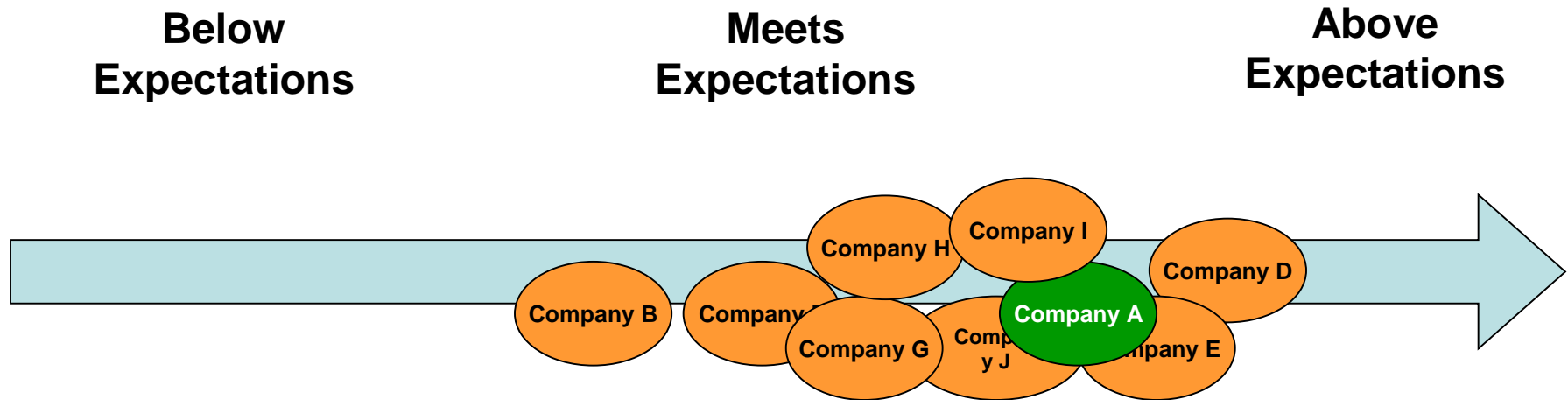
**As such, Client required a better understanding of.....**

- ⇒ Overall awareness and familiarity of spider lifts EMERGING
- ⇒ Customer perceptions of competitive environment ASSESS S&W
- ⇒ Current and future demand and applications for spider lifts
- ⇒ Interest and impact of a major manufacturer entering the market
- ⇒ Customer activity related to spider lifts - applications, utilization

**nxtMOVE conducted interviews primarily with rental companies in.....**

- ⇒ Europe = UK, France, Spain, Germany, Scandinavia (40 interviews)
- ⇒ United States (15 interviews)
- ⇒ Australia (10 interviews)
- ⇒ Asia = China and Singapore (5 interviews)

## Company A is a leader in the price / value equation



- In general, OEMS are meeting or slightly exceeding customer pricing requirements
- Company B is universally known for expensive high quality spider lifts
- Company A, Company D, and Company E are ranked as manufacturers with the right combination of price and quality
- Company F may be attempting to capture share by lowering its prices in Southern Europe

# Spider lifts are established in Europe, however low US product awareness leads to the following conditions.....

**Potential mature US market size (unit volume) at conservative European penetration rates**

Annual AWP Sales (units)	#####
AWP Retention Rate (years)	#
Spider Lift Retention Rate (years)	#
Ratio of Spider Lifts to AWP	#####

**Annual Spider Unit Sales (units) #####**

- Available market could double if 2007 European penetration rates are achieved
- Opportunity for Client to define and create the market

**Potential annual European spider lift market size (unit volume) after full economic recovery to 2007 levels**

Annual AWP Sales (units)	#####
AWP Retention Rate (years)	#
Spider Lift Retention Rate (years)	#
Ratio of Spider Lifts to AWP	#####

**Annual Spider Unit Sales (units) #####**

- Market education on outdoor applications could significantly increase available market
- Competition with XXX and well established XXX will be significant

+



**Client views long-term conditions favorably and enters into partnership with Company A**