2014 EGSA PULSE SURVEY RESULTS

Presented by: Chris Nagle, Dresser-Rand

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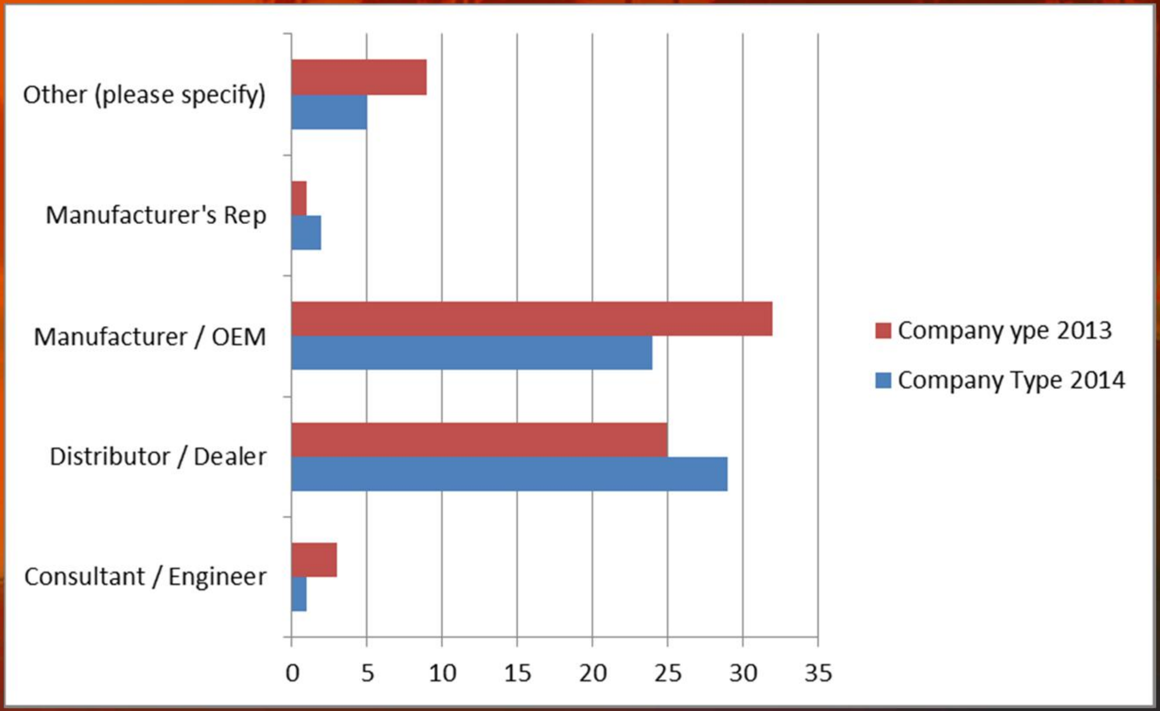
Respondent Company Type Makeup



53 of 62 survey respondents (85%) were represented as Distributor / Dealer or Manufacturer / OEM companies.

Respondent Functions

- *35% were in executive management positions*
- *26% were in a sales related position.*
- *6% were in marketing.*

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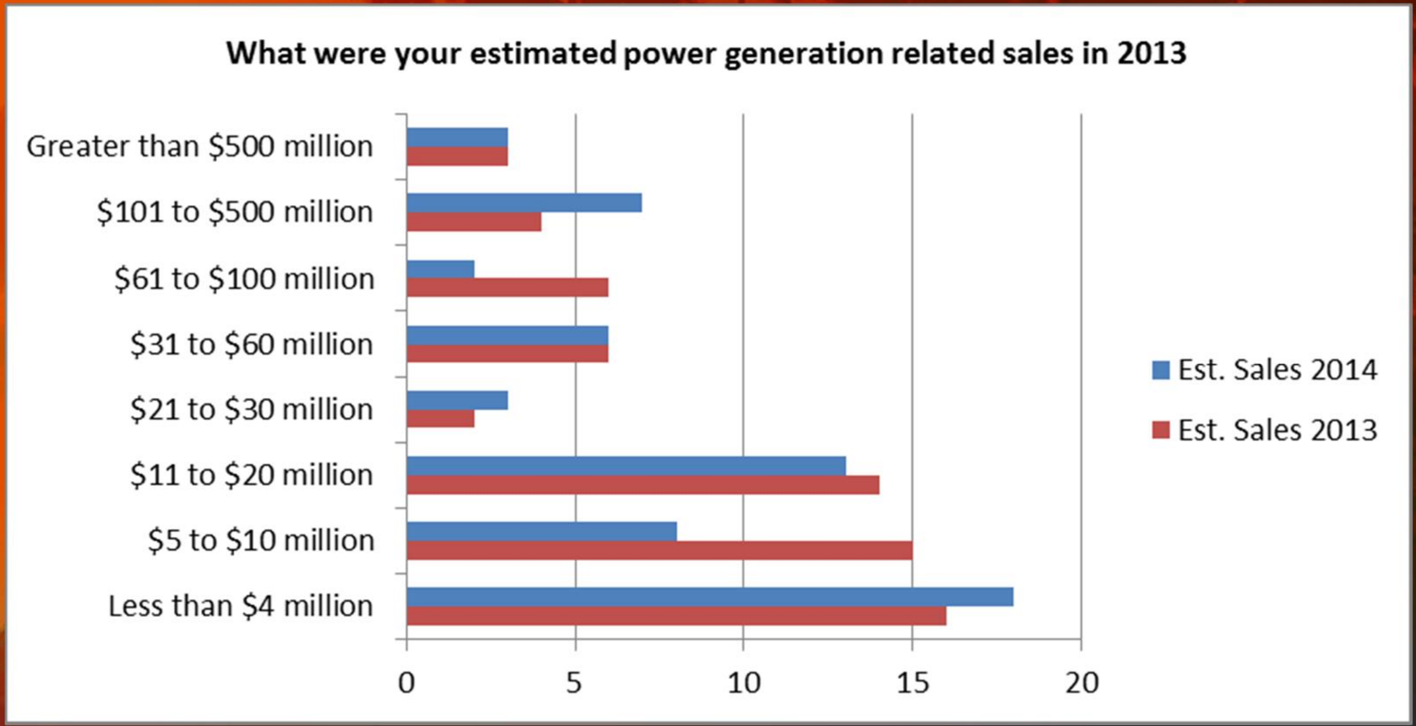
Estimated Previous Year's Power Generation Sales



- *43% of respondents reported they < $10 million in sales*
- *30% of respondents < $4 million*

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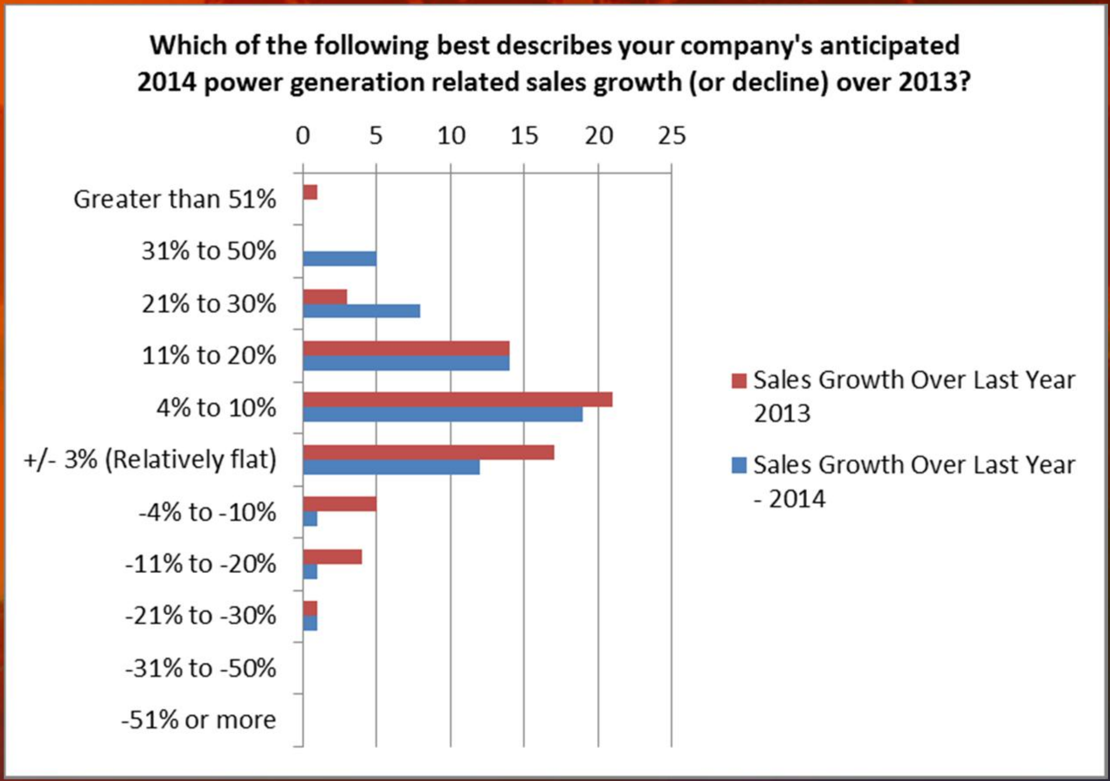
Anticipated 2014 Sales Growth or Decline Over 2013



- *46 of 62 respondents (74%) reported 2014 growth >4% over 2013*
- *12 of 62 respondents (20%) reported relatively flat sales in 2014 in comparison to 2013.*
- *3 of 62 respondents (5%) indicated sales in 2014 have declined from 2013 levels*
- *15% more respondents reported growth of 4% or greater in 2014 vs. 2013*

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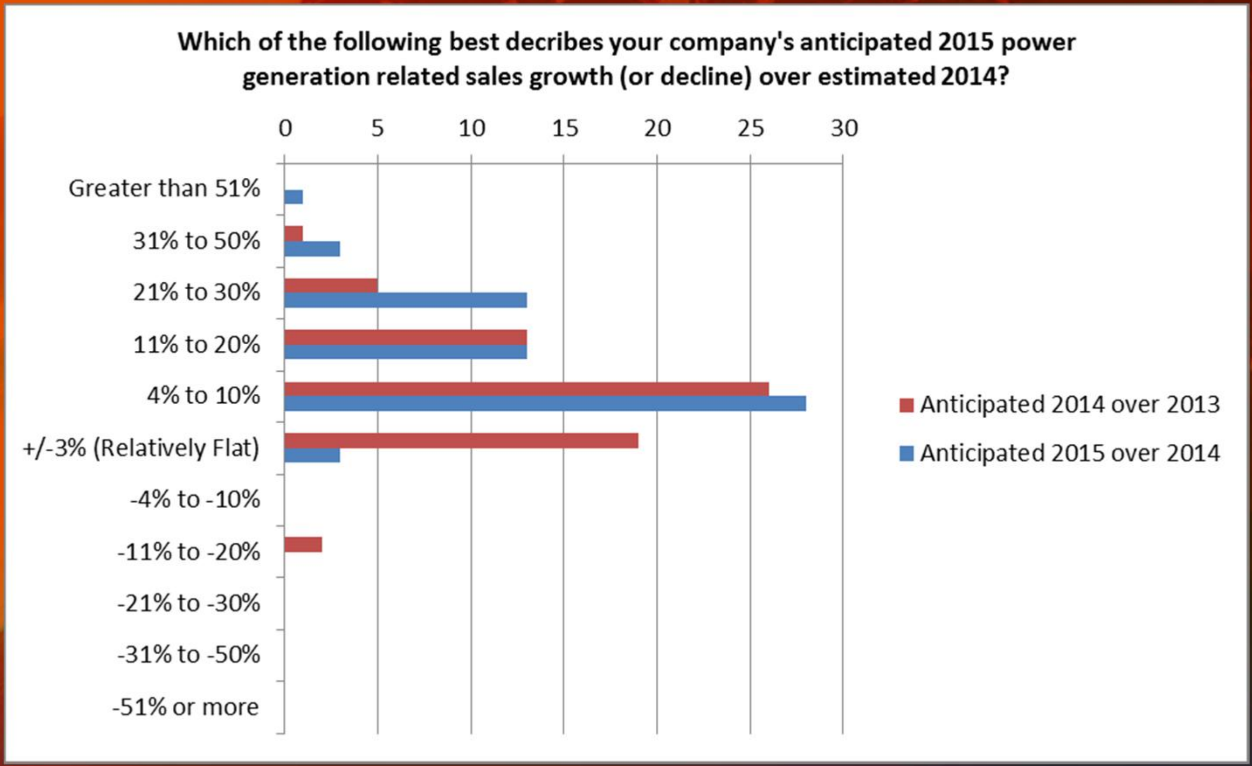
Anticipated 2015 Sales Growth or Decline Over 2014



- *95% anticipate growth > 4% in 2015*
- *68% anticipated growth >4% from 2013 to 2014*
- *Overall there is optimism surrounding the outlook for the upcoming year as compared to a year ago*

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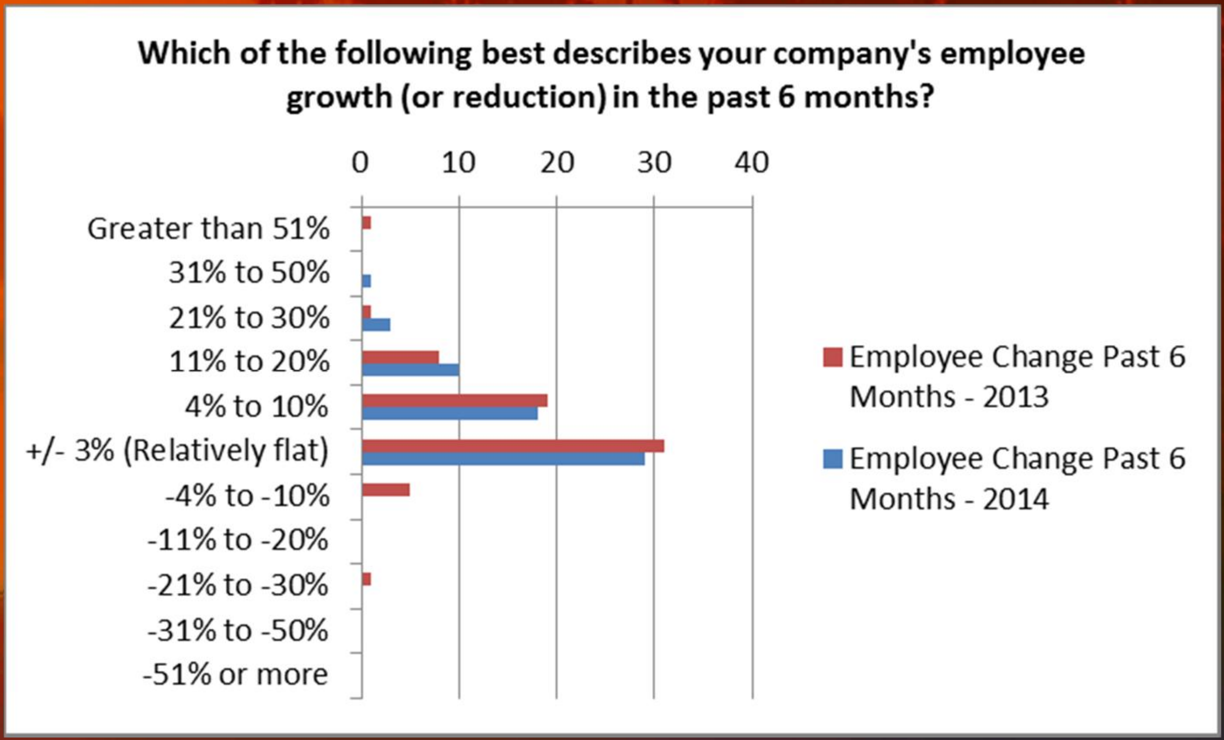
Employee Growth or Reduction in the PAST 6 Months



- *32 of 62 respondents (52%) reported employee increases*
- *29 of 62 (48%) reporting relatively flat employee growth over the past 6 months.*
- *0 of the 62 respondents reported employee reductions*

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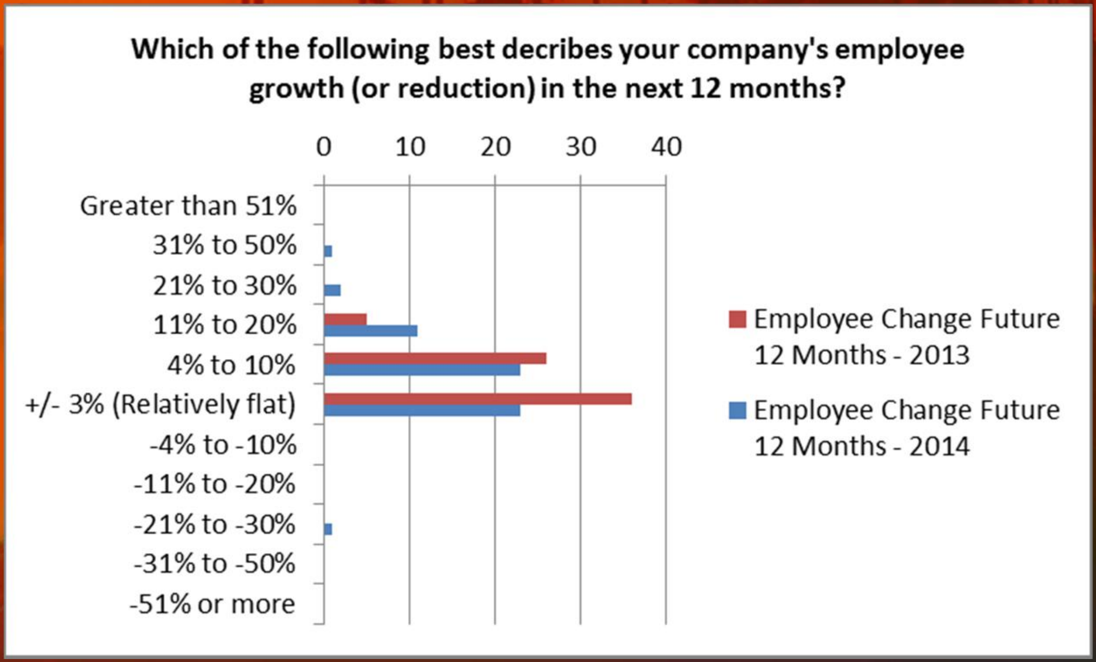
Employee Growth or Reduction in the NEXT 12 Months



- *23 of 62 respondents (38%) anticipated employee staffing levels to remain relatively flat*
- *34 of 62 respondents (56%) are anticipating increases in employee staffing level in the range of 4-20%.*

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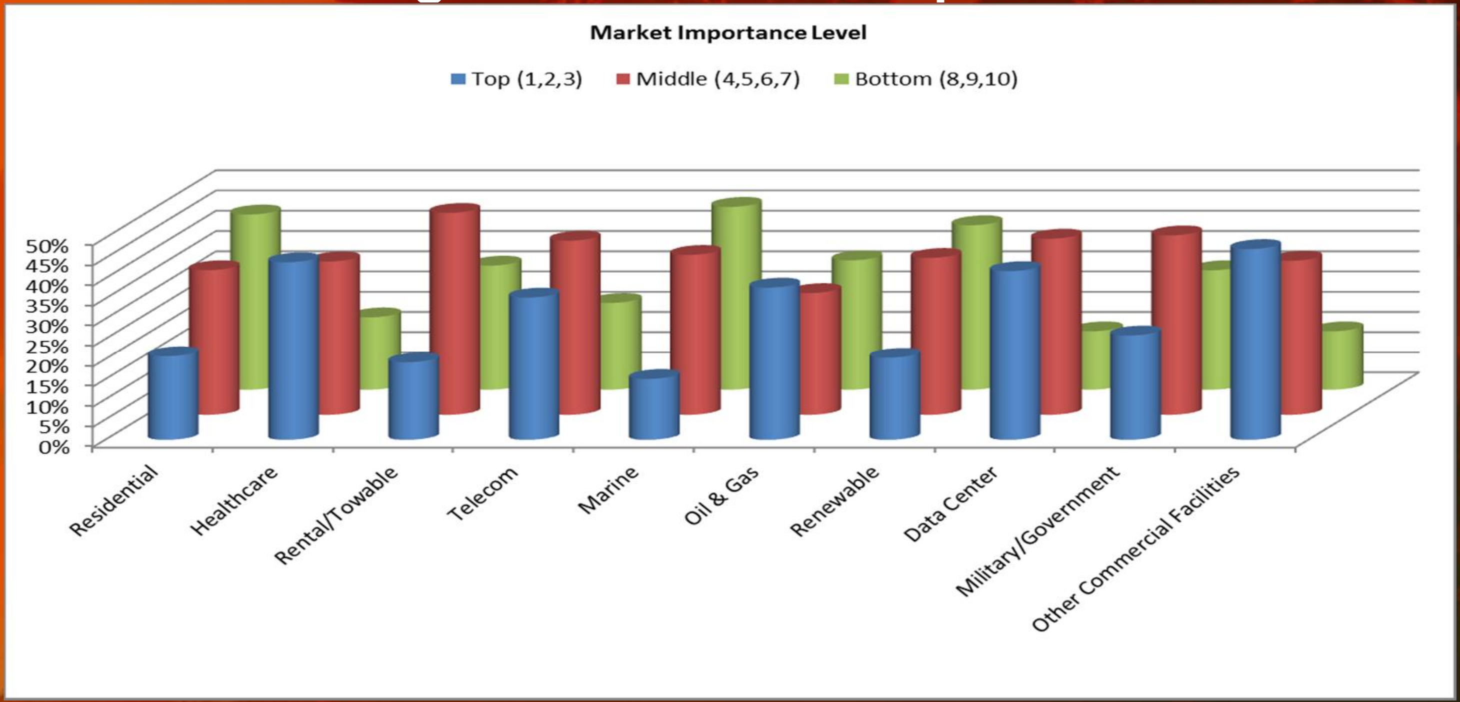
Ranking of Market Importance



The market importance level indicates where EGSA members focus their engineering, sales and marketing efforts. Please note that these levels are "of the moment" and do not necessarily indicate a company's ongoing or future marketing strategy.

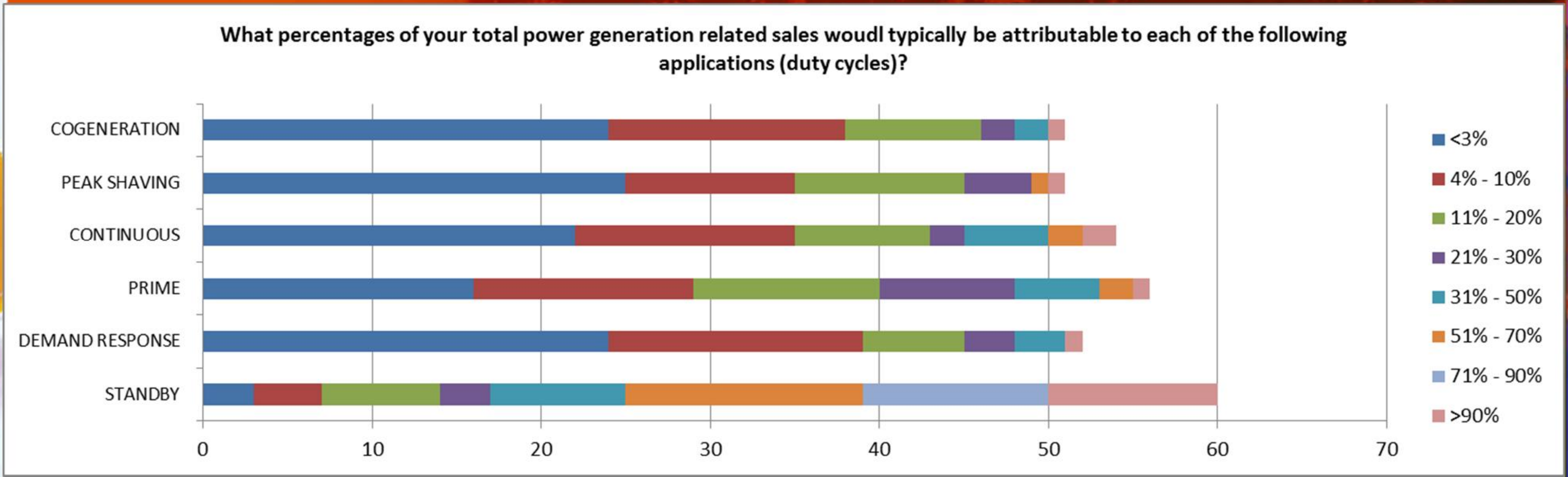
- *"Top" category of 1, 2, 3 = other commercial facilities, data center and healthcare*
- *"Bottom" category 10,9,8 = marine, residential and renewables*

Estimated 2015 Growth or Decline by Category

Please indicate your company's ESTIMATED 2015 power generation sales growth (or decline) over 2014 in each of these categories?

Category	2014	2013	Difference
Data Centers	68%	70%	-2%
Other Commercial Facilities	63%	62%	1%
Healthcare	61%	53%	8%
Oil and Gas	58%	47%	11%
Rental / Towable	49%	45%	4%
Military / Government	48%	37%	11%
Telecom	45%	47%	-2%
Residential	37%	34%	3%
Renewables	32%	27%	5%
Marine	20%	25%	-5%

Sales by Duty Cycle



- *56% of respondents indicated that standby power accounts for over 50% of their sales*
- *25% of respondents indicated that prime power accounts for 20% of sales or greater*
- *17% of respondents indicated that continuous power accounts for 20% of sales or greater*
- *86% of respondents indicated that demand response accounts for 20% of sales or less*
- *73% of respondents indicated that peak shaving duties account for 20% of sales or less*
- *75% of respondents indicated that cogeneration accounts for 20% of sales or less*

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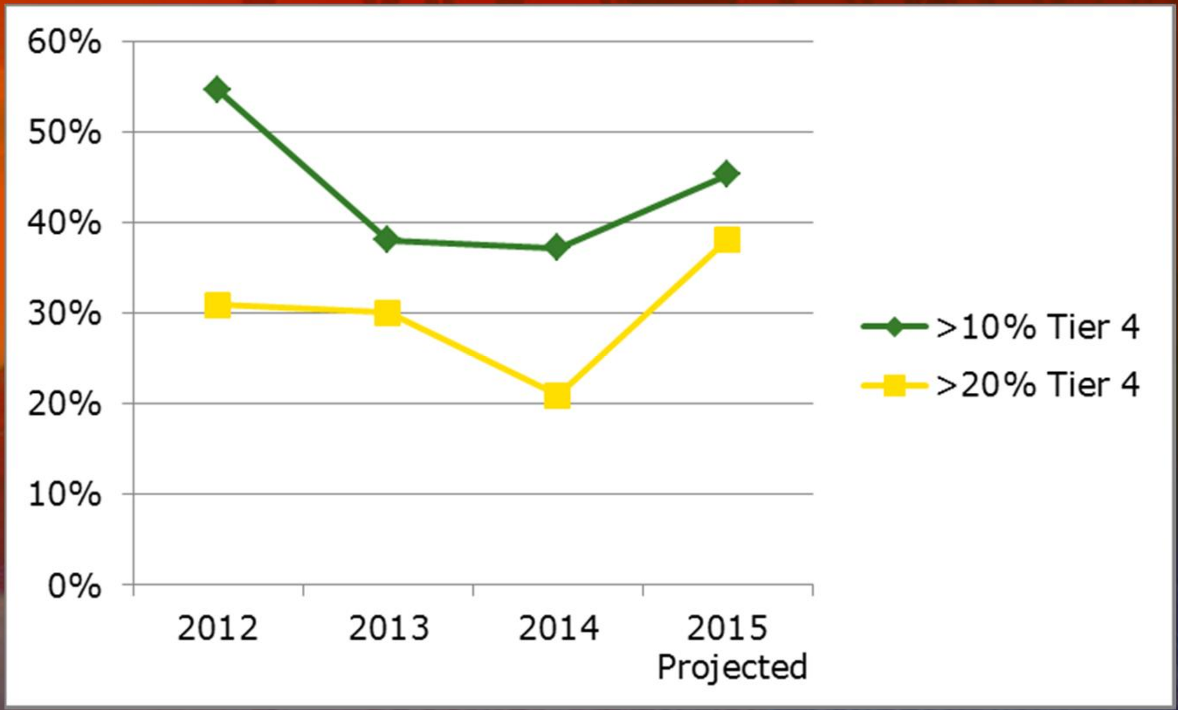
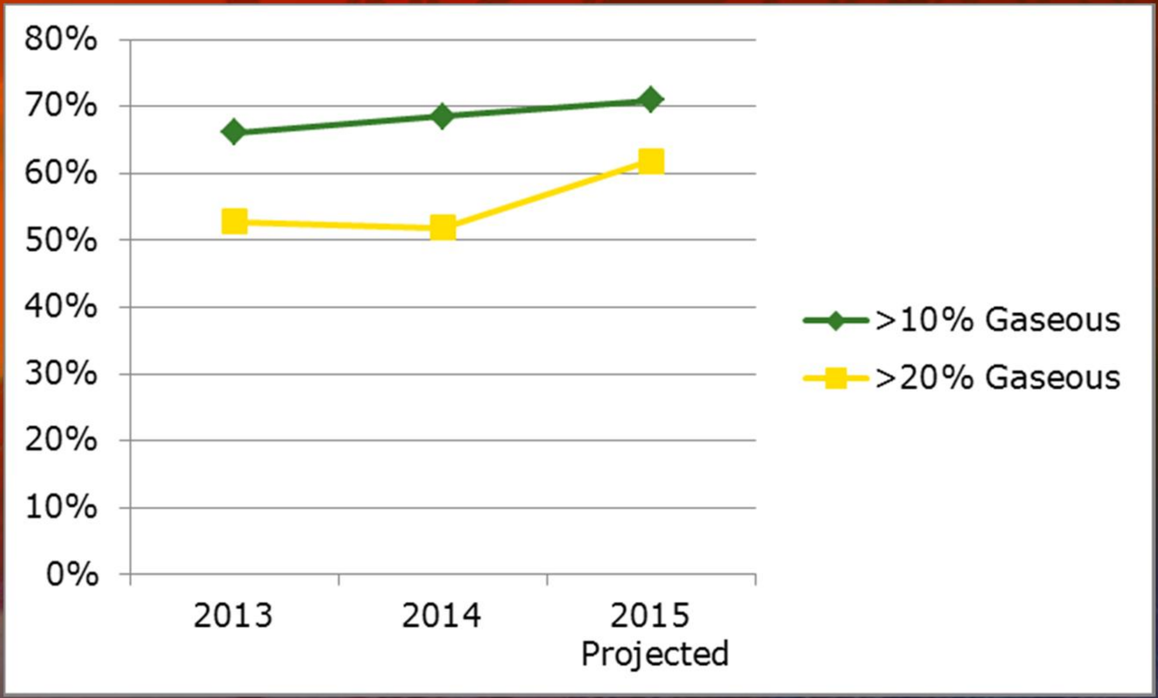
Percentage of Sales Attributed to Tier 4

Sales attributed to Tier 4 (as a % of total business)	2012	2013	2014	2015 Projected
>10% Tier 4	55%	38%	37%	45%
>20% Tier 4	31%	30%	21%	38%



Percentage of Sales Attributed to Gaseous Fuel

Sales attributed to Gaseous Fuels (as a % of total business)	2013	2014	2015 Projected
>10% Gaseous	66%	69%	71%
>20% Gaseous	53%	52%	62%



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QUESTIONS

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