The global car rental market performed well during the historic period, recovering from the slowdown recorded at the beginning of 2009 due to the financial crisis and recession. Overall, growth was recorded in the four regions – Americas, Asia-Pacific, Europe, Middle East and Africa – across all key performance indicators (KPIs) during the historic period. This is expected to continue over the forecast period, supported by the rise in tourism flows and expenditure.

- According to the Travel & Tourism intelligence center (TTIC) analysis based on 40 countries around the world, the US was the leader in the car rental market in terms of both market value and fleet size. The US recorded US$28.6 billion market value in 2013, which is more than six times that of its competitor, Japan, which recorded US$4.2 billion market value in 2013.

- The Eurozone crisis had a negative impact on the Travel and Tourism sector in European countries. However, car rental KPIs showed resilience in many countries (with the exception of Italy and Spain) with overall growth recorded in KPIs during the historic period. The hosting of international events such as Olympic Games in London in 2012 and Winter Olympic Games in Russia in 2014 have partially supported the growth.

- Challenging economic conditions and fierce competition have resulted in a large number of deals recorded in the global car rental market during the historic period as a means for operators to improve profitability and remain competitive. Some of the biggest deals in the car rental market were recorded in the US such as the acquisition of Dollar Thrifty Automotive Group by Hertz. Several leading car rental operators from North American and Europeans market are trying to expand their business in Asia-Pacific, Africa, and South and Central America by entering into joint ventures and partnerships to develop new hotels and benefit from the growing demand for car rental in these emerging markets.

- Japan was the largest car rental market in the Asia-Pacific region with a total market value of US$4.2 billion in 2013. South Korea followed closely with a market value of US$4.1 billion in 2013; however, it is expected to surpass Japan's car rental market value in 2014 to become the largest market with US$4.4 billion in revenue. Hong Kong was the smallest market with total market value of US$14.8 million. China is a rapidly developing rental market, which recorded the highest growth in total car rental market value in the region at a CAGR of 26.05% during the historic period.

- South Africa was the largest car rental market in the Middle East and Africa with a total market value of US$492.3 million in 2013, closely followed by Saudi Arabia with a market value of US$490.2 million. However, the Saudi Arabian car rental market is expected to surpass South Africa's car rental market value in 2014 to become the largest market with US$513.1 million in revenue.

Synopsis

- The report provides detailed market analysis, information, and insights, including:
  - Historic and forecast revenue of the global car rental market, covering 40 countries
  - Detailed analysis, region-wise (Americas, Asia-Pacific, Europe, Middle East & Africa), of car rental companies' key performance indicators such as market value by business travelers, market value by leisure travelers, market value at airports, market value at non-airports, fleet size, number of rental occasions, number of rental days, average rental length, utilization rate, and average revenue per day for the historic and forecast periods
  - Brief analysis of the global car rental market and the present scenario
  - Detailed analysis of the market trends in key car rental markets

Reasons To Buy

- Make strategic business decisions using historic and forecast market data related to the global car rental
- Understand the key market trends and growth opportunities in the global car rental market
- Gain strategic insights on the leading global car rental companies

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