Brazil Car Rental Industry and Toll Application Market Outlook To 2020 - Increasing Sporting and Cultural activities and Robust Tourism to Foster Future Growth

Description: The report titled "Brazil Car Rental Industry and Toll Application Market Outlook To 2020 - Increasing Sporting and Cultural activities and Robust Tourism to Foster Future Growth" provides a comprehensive analysis regarding the performance of car rental industry in Brazil. The revenues of the industry have been segmented on the basis of fleet outsourcing (car leasing), and Rent a Car (RAC) market. Under each segment, aspects such as market size on the basis of revenue and fleet size have been computed. The report also covers market share in each segment along with the company profile of car rental companies, pricing analysis, government regulation and working model of Brazil car rental industry.

In addition to this, the report also covers Brazil toll application market size on the basis of revenues and road network, payment systems and legislation. This report will help industry consultants, car rental and leasing companies, car aggregators, potential entrants and other stakeholders to align their market centric strategies according to the ongoing and expected trends in the future.

Brazil Car Rental Industry Overview:

In 2015, the number of car rental companies in Brazil totaled ~ and the number of rental points in the country increased to ~. The rental sector has remained one of the main clients for the automotive industry and was responsible for absorbing ~% of all cars and light utility vehicles licensed in 2015.

The fleet outsourcing and management segment contributed highest to the overall industry revenues, amounting to a share of ~% and ~% in 2010 and 2015 respectively. Long term contracts coupled with higher pricing packages and daily average rental from the commercial vehicles segment helped in the dominance of the fleet outsourcing market.

The revenue contribution by the self-driven rental market increased from USD ~ million in 2010 to USD ~ million during 2015. The revenue contributed by the Chauffeur-driven segment increased from USD ~ million in 2010 to USD ~ million in 2015. The changing preferences towards the use of self-driven cars have played a vital role towards the low revenue growth of the chauffeur-driven segment. In addition to this, price sensitive individuals prefer to utilize self-driven cars over chauffeur driven cars as the seating capacity is reduced when individuals rent chauffeur driven cars.

Brazil Fleet Outsourcing and Management Market:

The revenues for the fleet outsourcing and management market increased from USD ~ million in 2010 to USD ~ million in 2015, achieving a CAGR of ~% during the same period. The car fleet in the leasing segment increased from ~ in 2010 to ~ in 2015, achieving a CAGR of 14.3% during the same period.

In 2015, the beverage, telecom and government sectors contributed ~% to overall revenues of the car leasing market. The increase in inflow of FDI, economic stabilization program and penetration in LTE and 3G bandwidth, especially in the north and northeast region aided the growth in revenues contributed by these sectors. Due to uncertainty in the economic environment, companies undertaking leasing contracts prefer a two year term due to the low risk associated with it; hence these contracts contributed ~% to the car leasing revenue. Companies undertaking three and four year term contracts receive discounted prices. Thus, three year contract contributed ~% to the leasing market revenues while four to five year contracts comprised of ~% of the car leasing revenues.

Localiza is the market leader in the car leasing segment in terms of revenue and fleet size in 2015, amounting to USD ~ million. The company has been a part of the car rental and leasing market for over 40 years due to which it has gained large popularity amongst the Brazilian population and a market share of ~% during 2015. The low replacement rate in the car leasing market (33 months) coupled with high expenditure on feet has resulted in the company attaining a large fleet size of ~ during the same year.
Rent a Car (RAC) Market:

The revenues from the rent a car segment augmented from USD ~ million in 2010 to USD ~ in 2015, achieving a CAGR of ~% during the review period. The revenues generated from self-driven car rentals and chauffeur driven car rentals comprise the Rent a Car (RAC) market. The fleet size increased from ~ in 2010 to ~ in 2015, attaining a CAGR of 17.1% during the review period.

The contribution by the self-driven rental market increased from USD ~ million in 2010 to USD ~ million in 2015. The downfall in revenues due to adverse macro-economic conditions coupled with political instability in the country was offset by the increase in international sporting and cultural events and the augmented inflow of international tourists.

Hertz garnered revenues amounting to USD ~ million from the Rent A Car (RAC) segment in 2015 with a fleet size of ~ during the same period. The company achieved a market share of ~% in terms of revenue and ~% in terms of fleet size. Hertz has managed to attain commendable revenues from a low fleet size due to the higher pricing packages offered by the company. Due to the higher prices levied by the company, it has a select customer base that has been catering to its rising revenues over the years. The smaller fleet size has also helped the company achieve utilization rate of ~% in 2015.

Toll Application Market:

The revenue generated from the toll market increased from USD ~ million in 2010 to USD ~ million in 2015. The year 2015 saw an increase in toll revenues by 18% even though the country was facing adverse economic and political climate. The toll road network increased from 15,365 km in 2010 to 16,212 km in 2013 and 19,118 km in 2015. During the same period, the private companies operating the toll roads increased from 53 in 2010 to 59 in 2015.

Key Topics Covered in the Report:

- Comparison of Brazil Car Rental Industry with USA by Revenues and Fleet Size, 2010-2015
- Operating Model of the Car Rental Industry in Brazil, 2015
- Brazil Car Rental Market Introduction
- Brazil Car Rental Market Size by Revenues and Fleet Size, 2010-2015
- Brazil Car Rental Market Segmentation by Rental Segments (Fleet outsourcing and Rent a Car) and Organized and Unorganized sector, 2015
- Brazil Fleet outsourcing Market Introduction
- Brazil Fleet outsourcing Market Size on the Basis of Revenue and Fleet Size, 2010-2015
- Brazil Fleet outsourcing Market Segmentation by Industry Verticals, Duration of Contract and Type of Vehicle, 2015
- Brazil Fleet outsourcing Market Share, 2015
- Brazil Rent a Car (RAC) market introduction
- Brazil Rent a Car (RAC) market size (Self-Driven and Chauffeur Driven Market size)
- Brazil Rent A Car market segmentation by Self-Driven revenues and Chauffeur Driven revenues. 2010-2015
- Brazil Self-Driven Car Rental Market Segmentation by Type of Booking Channel, Type of Car, By Usage and Packages Offered, 2015
- Brazil Chauffeur Driven Market Size on the Basis of Revenue, 2010-2015
- Brazil Chauffeur Driven Market Segmentation By On Airport/Off Airport, By Business and Leisure Segments, By Type of Booking Channel, By Car Type and Cities, 2015
- Market Share of Major Players in Brazil Rent a Car Market, 2015
- Future outlook for Brazil Rent a Car market, 2016-2020
- Government Regulation in Brazil Car Rental Industry
- Brazil Toll Application Market Size On the Basis Of Revenues and Toll Road Network, 2010-2015
- Payment Structure and Legislation in Toll Application Market
- Competitive Landscape of Major Car Rental and Leasing Companies in Brazil
- Growth Drivers, Trends and Challenges in Brazil Car Rental Industry
- SWOT Analysis of Brazil Car Rental Industry
- Analyst Recommendations
- Macro-Economic Factors affecting the Car Rental Industry In Brazil
Brazil Car Rental Industry Overview
Brazil Fleet Outsourcing Market Overview
Brazil Rent a Car (RAC) Market Overview
Brazil Self-Driven Car Rental Market Overview
Brazil Chauffeur-Driven Car Rental Market Overview
Government Regulation in Brazil Car Rental Market
Toll Application Market Overview
Growth Driver and Trends in Brazil Car Rental Industry
Challenges In Brazil Car Rental Market
Analyst Recommendations

2. Research Methodology
2.1. Market Definitions
2.2. Abbreviations
2.3. Consolidated Research Approach
Market Sizing - Brazil Car Rental Industry
Limitations
Variables (Dependent and Independent)
Multifactor Bases Sensitivity Model
Final Conclusion

3. Comparison of Brazil Car Rental Market With USA
3.1. Introduction
3.2. By Revenues, 2010-2015
3.1. By Fleet Size, 2010-2015

4. Operating Model of The Car Rental Market in Brazil

5. Genesis of Car Rental Market in Brazil
Market Overview
Fleet Overview
Customer Profile
Regional Network

6. Brazil Car Rental Market Size

7. Brazil Car Rental Market Segmentation
7.1. By Car Rental Segments, 2010-2015
7.1. By Organized and Unorganized Sector, 2015

8. Brazil Fleet Outsourcing Market
8.1. Brazil Fleet Outsourcing Market Introduction
8.2. Brazil Car Leasing (Fleet Outsourcing) Market Size
8.2.1. By Revenue and Fleet Size, 2010-2015
8.3. Brazil Fleet Outsourcing Market Segmentation
8.3.1. By Major Industry Verticals, 2015
8.3.2. By Duration of Contract, 2015
8.3.3. By Type of Vehicle, 2015
8.5. Future Outlook for Brazil Car Leasing Market, 2016-2020

9. Brazil Rent a Car Market
9.1. Brazil Rent a Car Market Introduction
9.2. Brazil Rent A Car Market Size
9.2.2. Brazil Rent a Car Market Segmentation
By Self-Driven and Chauffeur Driven Car Rental Revenues, 2010-2015
9.2.3. Brazil Self-Driven Car Rental Market Segmentation
By Type of Booking Channel, 2015
By Packages Offered, 2015
By Usage, 2015
By Type of Car, 2015
9.2.4. Pricing Analysis in Brazil Self-Driven Car Rental Market, 2016
9.2.5. Brazil Chauffeur Driven Car Rental Market Size
   By Revenues, 2010-2015
9.2.6. Brazil Chauffeur Driven Car Rental Market Segmentation
   By On Airport and Off Airport, 2015
   By Business and Leisure Segment, 2015
   By Type of Booking Channel (Online/Offline), 2015
   By Cities, 2015
9.2.7. Market Share of Major Players in Brazil Rent a Car Market, 2015
9.2.8. Future Outlook for Brazil Rent a Car Market, 2016-2020

Self-Driven Car Rental Market Size, 2016-2020
Chauffeur Driven Car Rental Market Size, 2016-2020

10. Government Regulation in Brazil Car Rental Industry
    Introduction
    Law No. 8955

11. Brazil Toll Application Market
    11.1. Brazil Toll Application Market Introduction
       Design and Administration
       Brazilian Highway Network
       Maintenance and Operational Contracts
       Current Scenario
    11.2. Brazil Toll Application Market Size, 2010-2015
       11.2.1. By Revenues from Toll Collection, 2010-2015
       11.2.2. By Toll Road Network, 2010-2015
    11.3. Payment Structure For Toll Roads
    Brazil Car Rental Companies
    11.4. Legislation in the Toll Application Market
    11.4.1. Toll Evasion In Brazil

12. Competitive Landscape of Major Car Rental Companies In Brazil
    Localiza
    Locamerica
    Unidas
    Hertz
    Budget (Avis Budget Group)

13. Snapshot on Rental Car Aggregator Market in Brazil

14. Growth Drivers, Trends and Challenges in Brazil Car Rental Market
    14.1.1. Growth Drivers and Trends
    Growing Tourism
    Improving Investment in Road Infrastructure
    Growth in Cell Phone Subscriptions and Internet Users
    Increase in Passenger Arrivals into the Country
    Fragmented Market
    14.1.2. Challenges

15. SWOT Analysis of Brazil Car Rental Market

16. Brazil Car Rental Market Future Outlook and Projections
    16.1. By Revenues, 2016-2020
    16.2. By Car Rental Segments, 2016-2020

17. Analyst Recommendations

18. Macro Economic Factors Affecting The Car Rental Market in Brazil
    18.1. Tourism Industry in Brazil, 2010-2020
    18.2. GDP Per Capita (PPP) in Brazil, 2010-2020
    18.3. Passenger Car Sales in Brazil, 2010-2020
    18.4. Internet Users in Brazil, 2010-2020
List Of Figures:
Figure 3 1: Comparative Landscape of Brazil and USA Car Rental and Leasing Market on the Basis of Revenues in USD Billion, 2010-2015
Figure 3 2: Comparative Landscape of Brazil and USA Car Rental and Leasing Market on the Basis of Fleet Size in Thousands, 2010-2015
Figure 4 1: Operating Model of the Car Rental and Car Leasing Market in Brazil, 2015
Figure 5 1: New Car Fleet Purchased By Car Rental Companies in Brazil by Car Manufacturer On The Basis Of Units in Percentage (%), 2015
Figure 5 2: New Car Fleet Purchased By Car Rental Companies in Brazil by Car Type on the Basis of Units in Percentage (%), 2015
Figure 5 3: Consumer Profile for Brazil Car Rental Market by Rental Segments on the Basis of Total Car Rental Users in Percentage (%), 2015
Figure 6 1: Brazil Car Rental Market Size on the Basis of Revenues in USD Million and Growth Rate in Percentage (%), 2010-2015
Figure 6 2: Brazil Car Rental Market Size on the Basis of Fleet Size in Units and Growth Rate in Percentage (%), 2010-2015
Figure 7 1: Brazil Car Rental Market Segmentation by Car Rental Segments (Fleet Outsourcing, Self-Driven and Chauffeur Driven) on the Basis of Revenues in Percentage (%), 2010-2015
Figure 7 2: Brazil Car Rental Market Segmentation by Organized and Unorganized Sector on the Basis of Number of Car Rental Companies in Percentage (%), 2015
Figure 8 1: Brazil Fleet Outsourcing (Car Leasing) Market Size on the Basis of Revenue in USD Million and Growth Rate in Percentage (%), 2010-2015
Figure 8 2: Brazil Fleet Outsourcing (Car Leasing) Market Size on the Basis of Car Fleet in Units and Growth Rate in Percentage (%). 2010-2015
Figure 8 3: Brazil Car Leasing Market Segmentation by Major Industry Verticals (Beverage, Telecom, Government and Others) on the basis of Revenues in Percentage (%), 2015
Figure 8 4: Brazil Fleet Outsourcing (Car Leasing) Market Segmentation by Duration of Contract On the Basis of Revenue in Percentage (%), 2015
Figure 8 5: Brazil Car Leasing Market Segmentation by Type of Vehicle (Light Vehicle and Heavy Vehicle) on the Basis of Revenues in Percentage (%), 2015
Figure 8 7: Brazil Car Leasing Market Size on the Basis of Revenue in USD Million and Growth Rate In Percentage (%), 2016-2020
Figure 9 1: Brazil Rent a Car Rental Market Size on the Basis of Revenue in USD Million and Growth Rate in Percentage (%), 2010-2015
Figure 9 2: Brazil Rent a Car Market Size on the Basis of Fleet Size in Units and Growth Rate in Percentage (%), 2010-2015
Figure 9 3: Brazil Car Rental Market Segmentation by Rent a Car Segments (Self-Driven and Chauffeur Driven) on the Basis of Revenues in Percentage (%), 2010-2015
Figure 9 4: Brazil Self Driven Car Rental Market Segmentation by Type of Booking Channel (Online and Offline) on the Basis of Revenue in Percentage (%), 2015
Figure 9 5: Brazil Self Driven Car Rental Market Segmentation By Packages Offered (Hourly, Daily, Weekly, Monthly) On The Basis Of Revenue In Percentage (%), 2015
Figure 9 6: Brazil Self Driven Car Rental Market Segmentation by Usage (Inter-City/Intra-City) on the Basis of Revenues in Percentage, 2015
Figure 9 7: Brazil Self Driven Car Rental Segmentation by Type of Car (Economy, Compact, Intermediate, Sedan, SUV) on the Basis of Fleet Size in Percentage (%), 2015
Figure 9 8: Brazil Chauffeur Driven Car Rental Market Size on the Basis of Revenue in USD Million and Growth Rate In Percentage (%), 2010-2015
Figure 9 9: Brazil Chauffeur Driven Car Rental Segmentation by On-Airport and Local Rentals on the Basis of Revenues in Percentage (%), 2015
Figure 9 10: Brazil Chauffeur Driven Car Rental Market Segmentation by Business and Leisure Segment on the Basis of Revenues in Percentage (%), 2015
Figure 9 11: Brazil Chauffeur Driven Car Rental Segmentation by Booking Channel (Online and Offline) on the Basis of Revenues in Percentage (%), 2015
Figure 9 12: Brazil Chauffeur Driven Car Rental Segmentation by Cities (Sao Paulo, Rio, Salvador, Manaus and Others) on the Basis of Revenues in Percentage (%), 2015
Figure 9 13: Market Share Of Major Players in Brazil Rent a Car Market On The Basis Of Revenue and Fleet Size In Percentage (%), 2015
Figure 9 14: Future Projections for Brazil Self Driven Car Rental Market on the Basis of Revenues in USD Million and Growth Rate in Percentage (%), 2016-2020
Figure 9 15: Future Projections for Brazil Chauffeur Driven Car Rental Market Size on the basis of Revenues in USD Million and Growth Rate in Percentage (%), 2016-2020
Figure 11 1: Types of Highway Concessions Model Adopted For Toll Highways in Brazil
Figure 11 2: Transparency In The Concessions Model For Toll Highways in Brazil
Figure 11 3: Brazil Toll Application Market Size on the Basis of Toll Collection Revenue in USD Billion and Growth Rate in Percentage (%), 2010-2015
Figure 11 4: Brazil Toll Market Size on the Basis of Road Network in Kilometers, 2010-2015
Figure 12 1: Company Profile of Budget on the Basis of Overview, Strategies and USP
Figure 14 1: Number of International Arrivals into Brazil in Millions and Growth Rate in Percentage (%), 2011-2016
Figure 14 2: Brazil Toll Road Network in Kilometers and Growth Rate in Percentage (%), 2010-2015
Figure 14 3: Brazil Cell Phone Subscribers and Internet Users per 100 Persons, 2010-2015
Figure 14 4: Challenges Faced by Car Rental Companies in Brazil
Figure 16 1: Brazil Car Rental Market Size on the Basis of Revenue in USD Million and Growth Rate in Percentage (%), 2016-2020
Figure 16 2: Brazil Car Rental Market Size by Rental Segments on the Basis of Revenue in Percentage (%), 2016-2020
Figure 16 3: Brazil Car Rental Market Size by Rental Segments on the Basis of Fleet Size in Percentage (%), 2016-2020
Figure 18 1: Brazil Travel and Tourism Industry Revenues on the Basis of Revenues in USD Billion and Growth Rate in Percentage (%), 2010-2020
Figure 18 2: Brazil Gross Domestic Product Per Capita by Purchasing Power Parity in USD Thousands, 2010-2020
Figure 18 3: Brazil Passenger Car Sales in Million and Growth Rate in Percentage (%), 2010-2020
Figure 18 4: Brazil Internet Users per 100 People and Growth Rate in Percentage (%), 2010-2020

List Of Tables:
Table 2 1: Correlation Matrix for Brazil Car Rental Industry
Table 2 2: Regression Coefficients Output for Brazil Car Rental Industry
Table 3 1: Comparison of Brazil Self Driven car Rental Market with China, India, and the U.S. on the Basis of Fleet Size, Business Model, Business Strategies and Other Parameters
Table 5 1: New Car Fleet Purchased by Car Rental Companies in Brazil by Car Manufacturer on the Basis of Units, 2015
Table 5 2: New Car Fleet Purchased by Car Rental Companies in Brazil by Car Type on the Basis of Units, 2015
Table 5 3: Consumer Profile for Brazil Car Rental Market by Rental Segments on the Basis of Total Car Rental Users in Thousands, 2015
Table 5 4: Total Number of Rental Places, Vehicle Fleet and Rental Companies in North Brazil by States, 2015
Table 5 5: Total Number of Rental Places, Vehicle Fleet and Rental Companies in North-East Brazil by States, 2015
Table 5 6: Total Number of Rental Places, Vehicle Fleet and Rental Companies in Middle-West Brazil by States, 2015
Table 5 7: Total Number of Rental Places, Vehicle Fleet and Rental Companies in South-East Brazil by States, 2015
Table 5 8: Total Number of Rental Places, Vehicle Fleet and Rental Companies in South Brazil by States, 2015
Table 6 1: Key Reasons for Growth and Development of Brazil Car Rental Industry, 2010-2015
Table 7 1: Brazil Car Rental Market Segmentation On The Basis Of Car Rental Segments (Fleet Outsourcing, Self-Driven and Chauffeur Driven), 2010-2015
Table 7 2: Brazil Car Rental Market Segmentation by Car Rental Segments (Fleet Outsourcing, Self-Driven and Chauffeur Driven) on the Basis of Revenues in USD Million, 2010-2015
Table 7 3: Key Reasons for Growth in Organized Car Rental Companies in Brazil
Table 7 4: Brazil Car Rental Market Segmentation by Organized and Unorganized Sector on the Basis of Number of Car Rental Companies in Units (%), 2015
Table 8 1: Key Reasons for Growth and Development in Brazil Car Leasing Market Size on the Basis of Revenues and Fleet Size, 2010-2015
Table 8 2: Brazil Fleet Outsourcing (Car Leasing) Market Segmentation by Major Industry Verticals (Beverage, Telecom, Government and Others) on the Basis of Revenues in USD Million, 2015
Table 8 3: Brazil Fleet Outsourcing Car Rental Segmentation by Duration of Contract on the Basis of Revenue in USD Million, 2015
Table 8 4: Brazil Car Leasing Market Segmentation by Type of Vehicle (Light and Heavy Vehicles) on the Basis of Revenue in USD Million, 2015
Table 8 5: Market Share of Major Players in Brazil Car Leasing Market on the Basis of Revenue In USD Million and Fleet Size in Units, 2015
Table 8:6 Rationale and USP of Major Players in Brazil Car Leasing Market, 2015
Table 8:7 Market Share of Major Players in Brazil Car Leasing Market On the Basis of Revenue and Fleet Size in Percentage (%), 2015
Table 8:8 Key Reasons for Growth and Development of Brazil Car Leasing Market Size, 2016-2020
Table 9:1 Key Reasons for Growth and Development for Brazil Rent a Car Market Size on the Basis of Revenues and Fleet Size, 2010-2015
Table 9:2 Brazil Car Rental Market Segmentation On The Basis Of Rent a Car Segments (Self-Driven and Chauffeur Driven), 2010-2015
Table 9:3 Brazil Car Rental Market Segmentation by Rent a Car Segments (Self-Driven and Chauffeur Driven) on the Basis of Revenues in USD Million, 2010-2015
Table 9:4 Brazil Self Driven Car Rental Segmentation by Type of Booking Channel (Online and Offline) on the Basis of Revenues in USD Million, 2015
Table 9:5 Brazil Self Driven Car Rental Market Segmentation by Packages Offered (Hourly, Daily, Weekly, Monthly) on the Basis of Revenues in USD Million, 2015
Table 9:6 Brazil Self Driven Car Rental Market Segmentation by Usage (Inter-City/Intra-City) on the Basis of Revenues in USD Million, 2015
Table 9:7 Brazil Self Driven Car Rental Market Segmentation by Type of Car (Economy, Compact, Intermediate, Sedan, SUV) on the basis of Fleet Size in Units, 2015
Table 9:8 Pricing Analysis for Major Players in Brazil Self Driven Car Rental Market on the Basis of Daily, Weekly and Monthly Charges in USD, 2016
Table 9:9 Key Reasons for Growth and Development in Brazil Chauffeur Driven Car Rental Market, 2010-2015
Table 9:10 Brazil Chauffeur Driven Car Rental Segmentation by On-Airport and Local Rentals on the Basis of Revenues in USD Million, 2015
Table 9:11 Brazil Chauffeur Driven Car Rental Segmentation by Business and Leisure Segment on the Basis of Revenues in USD Million, 2015
Table 9:12 Brazil Chauffeur Driven Car Rental Market Segmentation by Booking Channel (Online and Offline) on the Basis of Revenues in USD Million, 2015
Table 9:13 Brazil Chauffeur Driven Car Rental Segmentation by Cities (Sao Paulo, Rio, Salvador, Manaus and Others) on the basis of Revenues in USD Million, 2015
Table 9:14 Market Share Of Major Players In Brazil Rent a Car Market On The Basis Of Revenue In USD Million And Fleet Size In Units, 2015
Table 9:15 Key Reasons For Growth and Development in Brazil Self Driven Car Rental Market Size, 2016-2020
Table 9:16 Future Outlook for Growth and Development of Brazil Chauffeur Driven Car Rental Market, 2016-2020
Table 10:1 The Franchise Regulation in Brazil Car Rental Market
Table 11:1 Key Reasons For Growth and Development of Brazil Toll Application Market on the Basis of Toll Collection, 2010-2015
Table 11:2 Key Reasons For Growth and Development in Brazil's Toll Road Network on the Basis of Toll Network, 2010-2015
Table 11:3 The Technology Employed By Toll Companies for Toll Payment Devices
Table 12:1 Company Profile of Localiza on the Basis of Overview Objectives, Strategies and USP
Table 12:2 Key Performance Indicators of Localiza by Rental Revenue, Fleet, Investment, Expenditure, Service Network, Utilization Rate and Others in South America and Brazil, 2014 and 2015
Table 12:3 Key Performance Indicators of Localiza by Revenue Split by Car Type, Available Car Days, Revenue per Car Day and Taxes Paid to the Government, 2015
Table 12:4 Company Profile of Locamerica on the Basis of Overview, Objectives, Strategies and USP
Table 12:5 Key Performance Indicators of Locamerica by Revenue, Gross Profit, Cost, Fleet Split, Revenue per Day, Rental Car Days and others in Brazil, 2014 and 2015
Table 12:6 Fleet Breakdown of Locamerica by Vehicle Type and by Manufacturer in Brazil, 2015
Table 12:7 Company Profile of Unidas on the Basis of Company Overview, Objectives, Strategies and USP
Table 12:8 Key Performance Indicators of Unidas by Revenue Mix, Fleet Split, Average Age of Fleet and Fleet Occupancy Rate in Brazil, 2014 and 2015
Table 12:9 Key Performance Indicators of Unidas by Service Network by Regions in Brazil, 2015
Table 12:10 Company Profile of Hertz on the Basis of Overview, Objectives, Strategies, and USP
Table 12:11 Key Performance Indicators of Hertz by Revenues Mix, Fleet Size Split, Available Car Days, Revenue per Car Day and Service Network in Brazil, 2014 and 2015
Table 12:12 Key Performance Indicators of Avis and Budget by Revenues Mix, Fleet Size Split, Available Car Days, Revenue per Car Day and Utilization Rate in Brazil, 2015
Table 15:1 SWOT Analysis for Brazil Car Rental Market
Table 16:1 Key Reasons for Growth and Development of Brazil Car Rental Market, 2016-2020
Table 16:2 Key Reasons for Growth and Development of Brazil Car Rental Market on the Basis of Rental
Segments, 2016-2020
Table 16 3: Brazil Car Rental Market Size by Rental Segments on the Basis of Revenue in USD Million (%), 2016-2020
Table 16 4: Brazil Car Rental Market Size by Rental Segments on the Basis of Fleet Size in Units, 2016-2020
Table 17 1: Analyst Recommendation and Implementation Strategies for Car Rental Companies in Brazil
Table 18 1: Tourism Industry in Brazil, 2010-2020
Table 18 2: Brazil Travel and Tourism Revenues in USD Million and Number of Arrivals in Thousands, 2010-2020
Table 18 3: GDP per Capita (PPP) in Brazil, 2010-2020
Table 18 4: Passenger Car Sales in Brazil, 2010-2020
Table 18 5: Rationale and Description for Internet Users in Brazil, 2010-2020
Table 18 6: Brazil Internet Users in Million, Internet Users per 100 Persons and Penetration Rate in Percentage (%), 2010-2020

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