



KEN RESEARCH

JANUARY

2014

Italy Car Rental Industry Analysis to 2017

- Increasing Growth in Off-Airport Segment

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SAMPLE

ITALY CAR RENTAL MARKET SIZE, 2006-2012

Italy has been one of the major destination places for tourists over the years. It is believed to be one of the most prominent places considered by travelers when scheduling a vacation trip in Europe...

...overall Italy car rental industry, which has been growing at a CAGR of 1.09% over the period 2006-2012, is expected to achieve higher growth in the coming years on account of higher population growth...

The number of rented passenger cars for shorter duration was ~ in 2008 which showcased a declining trend year on year as it reduced to ~ in 2012, whereas the rented LCV's for shorter period was nearly ~ in 2008 which reduced to ~ in 2012...

Figure: Italy Car Rental Industry Market Size on the Basis of Revenue in USD Million, 2006-2012

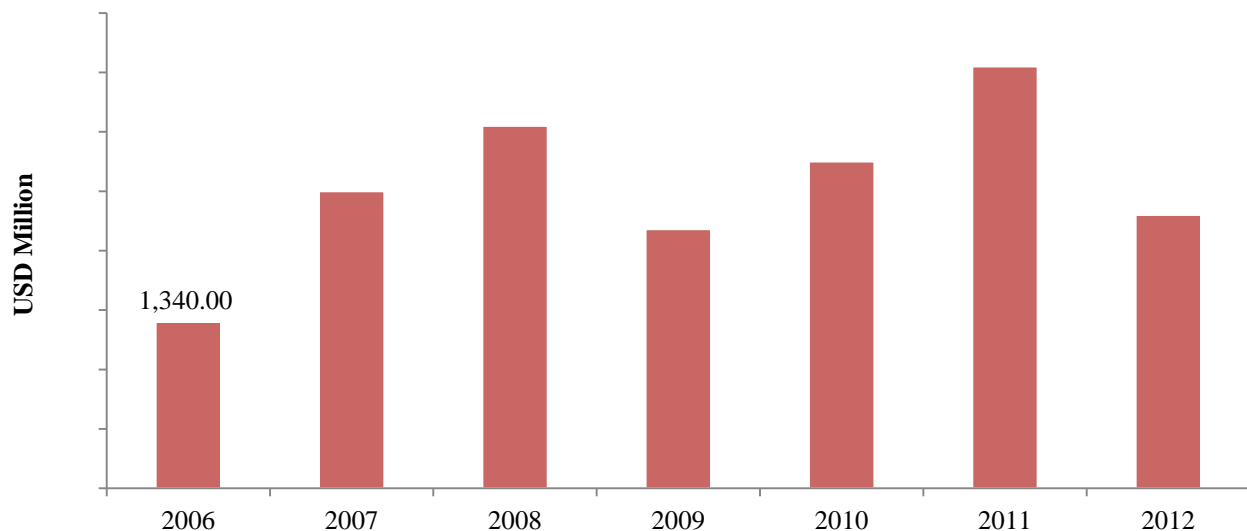


Table: Italy Car Rental Market Size by Number of Fleets, 2008-2012

Particulars	2008	2009	2010	2011	2012
Passenger Cars					
Light Commercial Vehicles		6,673			

Total					
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ITALY CAR RENTAL MARKET SEGMENTATION, 2006-2012

BY ON-AIRPORT AND OFF-AIRPORT SEGMENT, 2006-2012

Italy car rental industry generates a major share of its revenue from the on-airport segment of the market. This segment contributed around ~% of the total car rental revenue in 2012...

... overall, it has been recorded that the off-airport car rental segment in Italy car rental market has escalated at an average annual growth rate of 3.00% over the period 2006-2012.

Figure: Italy Car Rental Market Segmentation by On-Airport and Off-Airport on the Basis of Contribution in Percentage (%), 2006-2012

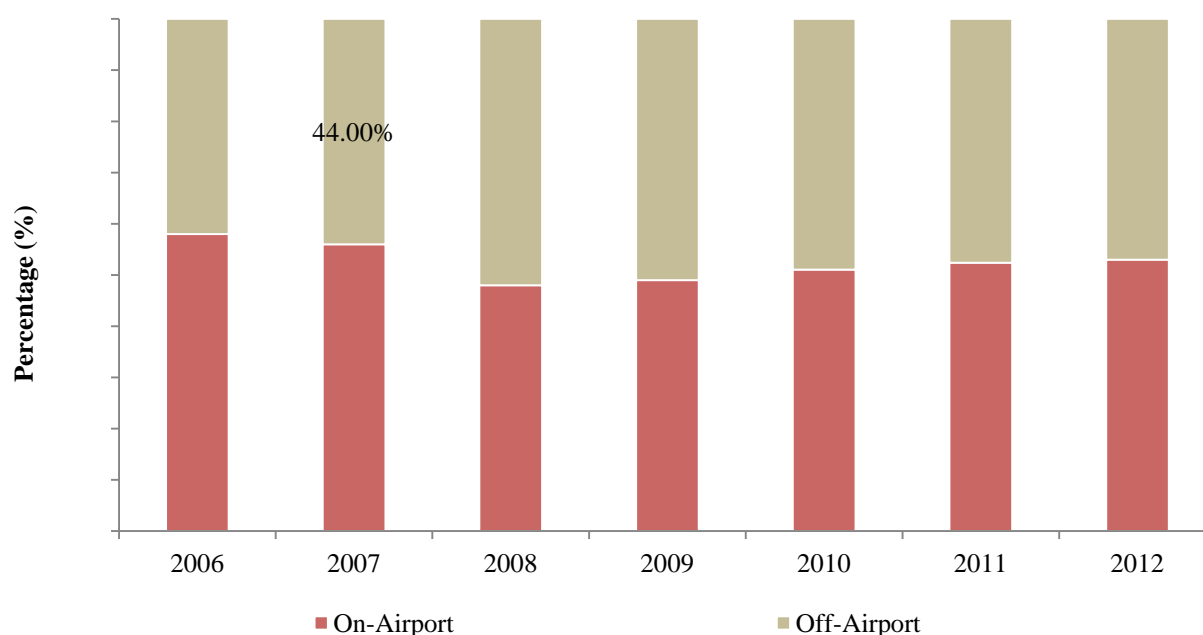


Table: Italy Car Rental Market Segmentation by On-Airport and Off-Airport on the Basis of Revenue in USD Million, 2006-2012

Particulars	2006	2007	2008	2009	2010	2011	2012
On-Airport			722.40				
Off-Airport							
Total							

BY ONLINE AND STATION BOOKINGS , 2006-2012

Italy recorded an over ~% increase in the number of internet users in the entire European region between April 2011 and 2012 which was recorded as fourth highest growth rate in the whole world...

...the share of online reservation to the car rental market revenues in Italy was ~% in 2006 which showcased a significant jump ~% in 2012. The revenue of the segment was valued at USD ~ million in 2012, which inclined considerably from USD ~ million recorded in the year 2007. Over the period 2006-2012, the internet booking segment in Italy has grown at a remarkable CAGR of 25.47%.

Figure: Italy Car Rental Market Segmentation by Online and Station Booking on the Basis of Contribution in Percentage (%), 2006-2012



Table: Italy Car Rental Market Segmentation by Online and Station Booking on the Basis of Revenue in USD Million, 2006-2012

Particulars	2006	2007	2008	2009	2010	2011	2012
Station Booking			1,197.98				
Online Segment							
Total							

MARKET SHARE OF MAJOR PLAYERS IN ITALY CAR RENTAL MARKET, 2006-2012

The car rental industry in Italy has been primarily dominated by four leading players including Europcar, Avis Budget, Hertz and Sixt which have contributed significantly in the car rental market of the country. The cumulative shares of these companies totaled to ~% to the total car rental market revenue in Italy in 2012...

... Hertz has also been one of the major players in Italian car rental business which marked a share of ~% in the revenues of the industry of rented cars in 2012 in the country...

...the market share of Sixt in on-airport market was ~% and that of in off-airport was ~% in 2012...

Table: Market Share of Major Players in Italy Car Rental Industry in Percentage (%), 2007-2012

Major Players	2007	2008	2009	2010	2011	2012
Europcar						
Avis Budget						
Hertz		15.37%				
Sixt						
Others						
Total						

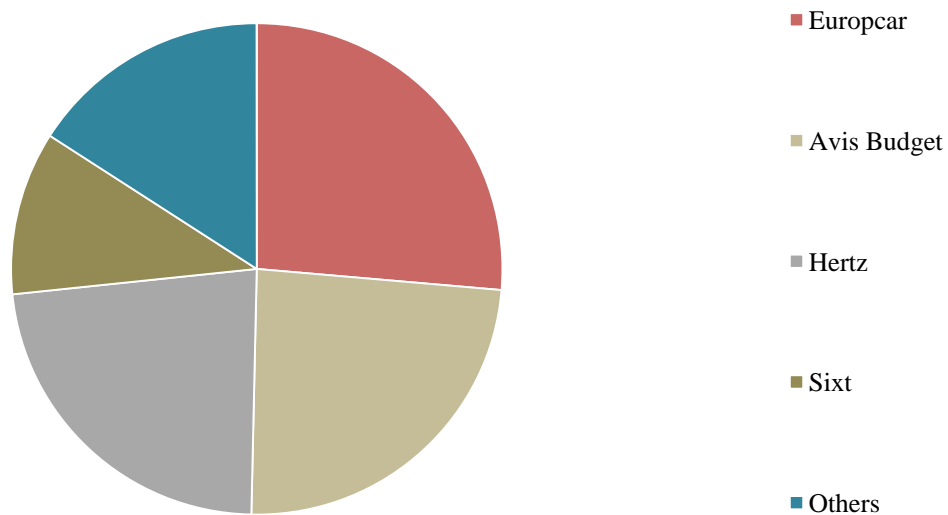
Table: Europcar Key Performance Indicators in Italy, 2011-2012

Category	2011	2012
Average Number of Fleet Size of a Company in Italy		
Number of Rental Days (Million)		
Number of Rental Transactions (Million)		
Fleet Utilization Rate (%)	71%	

Table: Europcar Online Reservation Share in Percentage (%), 2006-2012

Particulars	2006	2007	2008	2009	2010	2011	2012
Share of Online Booking to the Revenue of Europcar in Percentage (%)				27.7%			

Figure 1: Market Share of Major Players in On-Airport Market in Italy, 2012



ITALY CAR SHARING INDUSTRY

In Italy, car sharing industry has showcased signs of increasing development over the past few years...

...ICS car sharing in Italy had total of ~ travelers with ~ vehicles available and ~ reserved parking areas. It has been noticed that the subscriptions are inclining with an average monthly rate of ~...

Table: The Car Sharing Industry in Various Cities of Italy by Number of Cars and Users, August, 2013

Cities	Cars	Users	Parking
Bologna			
Brescia			
Firenze			
Genova			
Savona			
Milano			
Padova			
Palermo			
Parma			
Rimini			
Roma			
Torino			
Venezia			

ITALY CAR RENTAL MARKET FUTURE PROJECTIONS, 2013-2017

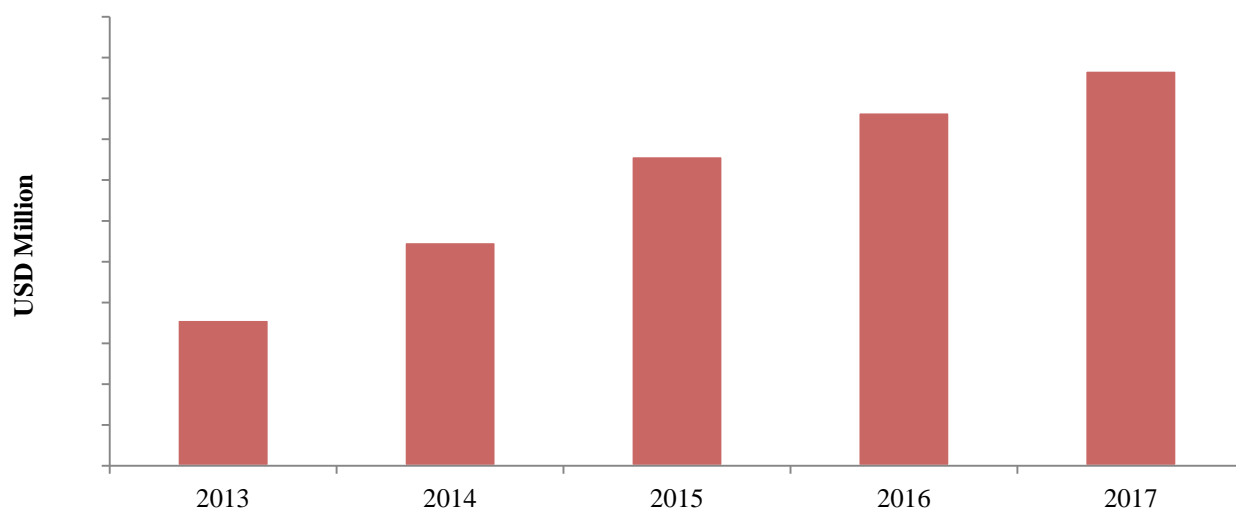
BY REVENUE, 2013-2017

Italy car rental market is estimated to grow at a CAGR of 5.67% over the period 2012-2017 strengthened by improving economic scenario, growing off-airport car rental market and increasing business and leisure trips...

... The fleet size of rented passenger cars is projected to grow at a CAGR of 4.57% over the period 2012-2017. Whereas, the LCV's rental fleet size are anticipated to grow at an average annual growth rate of ~% from 2012-2017 with number of fleets increasing to ~ in 2017 as compared to 6,200 in 2012...

...the industry is anticipated to grow at a notable average annual growth rate of 5.67% in the next 5 years, attaining revenues worth USD ~ million by 2017...

Figure: Italy Car Rental Market Future Projection on the Basis of Revenue in USD Million, 2013-2017



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