

2005 U.S. Car Rental Market^{††}

Fleet, Locations and Revenue by Market Segments

Company	U.S. Cars in Service (Avg.) 2005	# U.S. Locations	U.S. Rental Revenue (M)		Market Segmentation			
			2005 (est.)	2004	Number of Airport Locations	Percent of Airport Transactions	Number of Local/Market Locations	Percent of Local/Market Transactions
* Enterprise Rent-A-Car	592,426	5,719	\$6.4B	\$5.83B	320	9%	5,399	91%
** Hertz	315,000	N/A	\$3.87B	\$3.5B	N/A	75%	N/A	25%
** Vanguard Car Rental USA	209,400	626	\$1.93B	\$1.84B	N/A	N/A	N/A	N/A
** Avis Rent A CarSystem Inc.	200,000	1,111	\$2.45B	\$2.28B	342	N/A	769	N/A
** Budget Rent A Car	105,000	773	\$1.22B	\$1.13B	226	N/A	521	N/A
** Dollar Rent A Car	75,000	260	\$979.9M	\$1,009M	120	90%	N/A	10%
** Thrifty Inc.	65,000	426	\$693.4M	\$679M	85	66%	341	34%
Advantage Rent-A-Car	15,000	132	\$150M	\$139M	32	60%	100	40%
U-Save Auto Rental of America Inc.	14,000	359	\$95M	\$90M	24	5%	335	95%
Rent-A-Wreck	8,100	271	\$66M	\$78M	0	0%	271	100%
ACE Rent A Car	12,500	90	\$101M	\$92M	69	85%	20	15%
Payless Car Rental System Inc.	10,000	43	\$90M	\$80M	55	90%	14	10%
Triangle Rent-A-Car	4,800	25	\$41M	\$37M	0	0%	25	100%
Pricele\$\$ Rent-A-Car	2,150	81	\$19M	\$21M	2	3%	79	97%
Affordable/Sensible	5,170	246	\$35.42M	\$33.12M	5	5%	241	95%
Fox Rent A Car	6,200	39	\$40M	\$50M	39	100%	0	0%
[†] Independents (3,000)	74,300	7,200	\$732.5M	\$750M	N/A	N/A	N/A	N/A
TOTALS	1,714,046	17,401	\$18,913M	\$17,638M				

Statistics based on company-provided data, public documents, industry research and ARN estimates.

Revenue comes from car rental operations only, including ancillary counter sales. Revenue represents the entire system, including corporate and franchise revenue (for those companies with franchises).

*Enterprise fiscal year ends July 31.

**ARN estimates.

[†] Estimate based on available U.S. Census Bureau figures and adjustments for recent closures and consolidation.

^{††} Correction from chart published in the ARN 2006 Fact Book. Enterprise and Industry fleet totals updated.



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