

2013 U.S. CAR RENTAL MARKET

FLEET, LOCATIONS AND REVENUE

COMPANY	U.S. CARS IN SERVICE (AVG.) 2013	# U.S. LOCATIONS	2013 U.S. REVENUE EST. (in millions)	2012 U.S. REVENUE (in millions)
Enterprise Holdings (Includes Alamo Rent A Car, Enterprise Rent-A-Car, National Car Rental)	979,370	6,045	\$11,900	\$11,500
Hertz (includes Dollar Thrifty)	488,000 ³	5,900	\$6,300 ³	\$5,200 ³
Avis Budget Group (includes Zipcar and Payless)	344,000	3,100	\$5,200 ³	\$4,600
Advantage Rent-A-Car (owned by FSNA)	24,000	72	\$60 ³	\$190 ³
Fox Rent A Car ¹	18,000	18	\$205	\$205
U-Save Auto Rental System (owned by FSNA)	11,500	125	\$118 ³	\$118 ³
ACE Rent A Car	10,000	92	\$100	\$100
Rent-A-Wreck of America	5,800	188	\$41	\$40
Triangle Rent-A-Car ²	4,000	29	\$40	\$40
Affordable/Sensible	3,500	185	\$32 ³	\$32 ³
Independents ⁴	62,000 ³	5,450 ³	\$550 ³	\$545 ³
TOTAL	1,950,170	21,204	\$24.546B	\$23.600B⁵

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

Revenue comes from U.S. car rental operations only. Fleet, location and revenue numbers represent entire U.S. operations, including franchises.

¹ Does not include affiliate operations.

² Fleet and U.S. locations are solely corporate owned. No franchise operations.

³ *ARN* estimates.

⁴ Independents estimates based on available U.S. Census Bureau figures and adjustments for recent openings, closures and consolidation.

⁵ Not shown on this chart are separate listings and revenues for Dollar Thrifty, Zipcar and Payless in 2012.

The Alamo Rent A Car, Enterprise Rent-A-Car and National Car Rental brands are part of Enterprise Holdings, which ended its fiscal year July 31, 2012.

THE CAR RENTAL INDUSTRY ACHIEVED A NEW RECORD FOR RENTAL REVENUE IN 2013, WHILE AVERAGE FLEET GREW TO ABOUT 1.96 MILLION UNITS. THAT TRANSLATES TO REVENUES OF \$1,048 PER UNIT, PER MONTH (RPU).

