

2014 U.S. CAR RENTAL MARKET

FLEET, LOCATIONS AND REVENUE

COMPANY	U.S. CARS IN SERVICE (AVG.) 2014	# U.S. LOCATIONS	2014 U.S. REVENUE EST. (in millions)	2013 U.S. REVENUE (in millions)
Enterprise Holdings (Includes Alamo Rent A Car, Enterprise Rent-A-Car, National Car Rental)	1,093,411	6,114	\$12,850	\$11,900
Hertz (includes Dollar Thrifty)	495,000 ³	6,110 ³	\$6,400 ³	\$6,324
Avis Budget Group (includes Payless, not Zipcar)	342,000	3,100	\$5,500 ³	\$5,000
Fox Rent A Car ¹	19,000	18	\$215	\$200
Advantage Rent-A-Car ²	18,000	43	\$200	\$60 ³
ACE Rent A Car	13,000	100	\$156	\$150
U-Save Auto Rental System (owned by FSNA)	12,000	140	\$123 ³	\$118 ³
Rent-A-Wreck of America	5,200	174	\$39	\$40
Triangle Rent-A-Car ²	4,000	29	\$40	\$40
Affordable/Sensible	3,700	190	\$33.5	\$32
Independents ⁴	68,000 ³	5,500 ³	\$570 ³	\$550
TOTAL	2,073,311	21,498	\$26.127B	\$24.414B

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. Independents include Sixt and E-Z Rent-A-Car.

Enterprise Holdings ended its fiscal year July 31, 2014.