

TOKKDER

Operational Leasing Sector Report

End of 3rd Quarter of 2015



TOKKDER Operational Leasing Sector Report

©TNS 2015



member of
Leaseurope



Index

1

Aim and Scope 03

2

Methodology and Participating Companies 06

3

Summary 10

4

Vehicle Park and Its Features 15

5

Contract Structure 20

6

Vehicle Investments, Vehicle Purchases,
Vehicle Sales and Paid Taxes 23

7

Number of Customers 33



1

Aim and Scope



Market Information



TOKKDER was founded in Istanbul in 1996 to integrate rent a car and car leasing companies under the same roof.

Vision

To be the only protector and the reference of the operational leasing and rent a car industries acting in perfect harmony with the laws and state policies, with high level of professionalism and ethical values, in order to provide better services to customers.

About TOKKDER

- 118 Members,
- Rent a Car and Operational Leasing Sectors,
- Member structure that covers 71% of sector,
- Member of Leaseurope,

(Leaseurope which has 45 members in 33 countries is known with its effects on EU regulations)



TOKKDER Operational Leasing Sector Report

©TNS 2015



member of
Leaseurope 

Aim and Scope of the Research



Aim

- ✓ To draw the overall picture Operational Leasing Sector,
- ✓ To identify the potential and trends of the sector,
- ✓ To inform customers, automotive and finance sectors, members and public about the sector trends.

Scope

- Vehicle park of the sector
 - Make based,
 - Segment based,
 - Fuel type based,
 - Transmission type based,
- Total number of customers
 - Within the period;
 - Number of sold and purchased vehicles,
 - Amount of vehicle purchases,
 - Amount of the paid taxes (SCT, VAT, MVT)
 - Number of contracts
 - Term based,
 - Currency based,

2

Methodology and Participating Companies



Methodology

The questionnaire which is prepared under the scope of the research and approved by the Competition Agency, was delivered to TNS in the digital environment by each company.

Total sector parameters are calculated by projecting the total vehicle purchase volume of the participating companies to the total sales figures to operational leasing sector which are estimated by using ODD reports and TOKKDER predictions. Hence, the sector representation ratio of the participating companies are as follows:

Year 2012	→ %70,15
Year 2013	→ %68,21
Year 2014	→ %66,29
3rd Quarter of 2015	→ %67,12




Participating Companies

 ➤ ALD AUTOMOTIVE

 ➤ ARKAS OTO FİLO YÖNETİMİ


 ➤ ATAKO DESTEK ARAÇ KİRALAMA
"Operasyonel Filo Kiralama"

 ➤ AUTOLAND OTOMOTİV

 ➤ CENTRAL FLEET SERVICES

 ➤ TEB ARVAL

 ➤ BORUSAN OTOMOTİV PREMIUM KİRALAMA*

 ➤ OTOPLAN OPERASYONEL TAŞIT KİRALAMA*


 ➤ DRD FİLO KİRALAMA

 ➤ FLEETCORP

 ➤ GARANTİ FİLO

 ➤ HEDEF FİLO

 ➤ LEASEPLAN

 ➤ OTOKOÇ OTOMOTİV

 ➤ TAN OTO MOTORLU ARAÇLAR

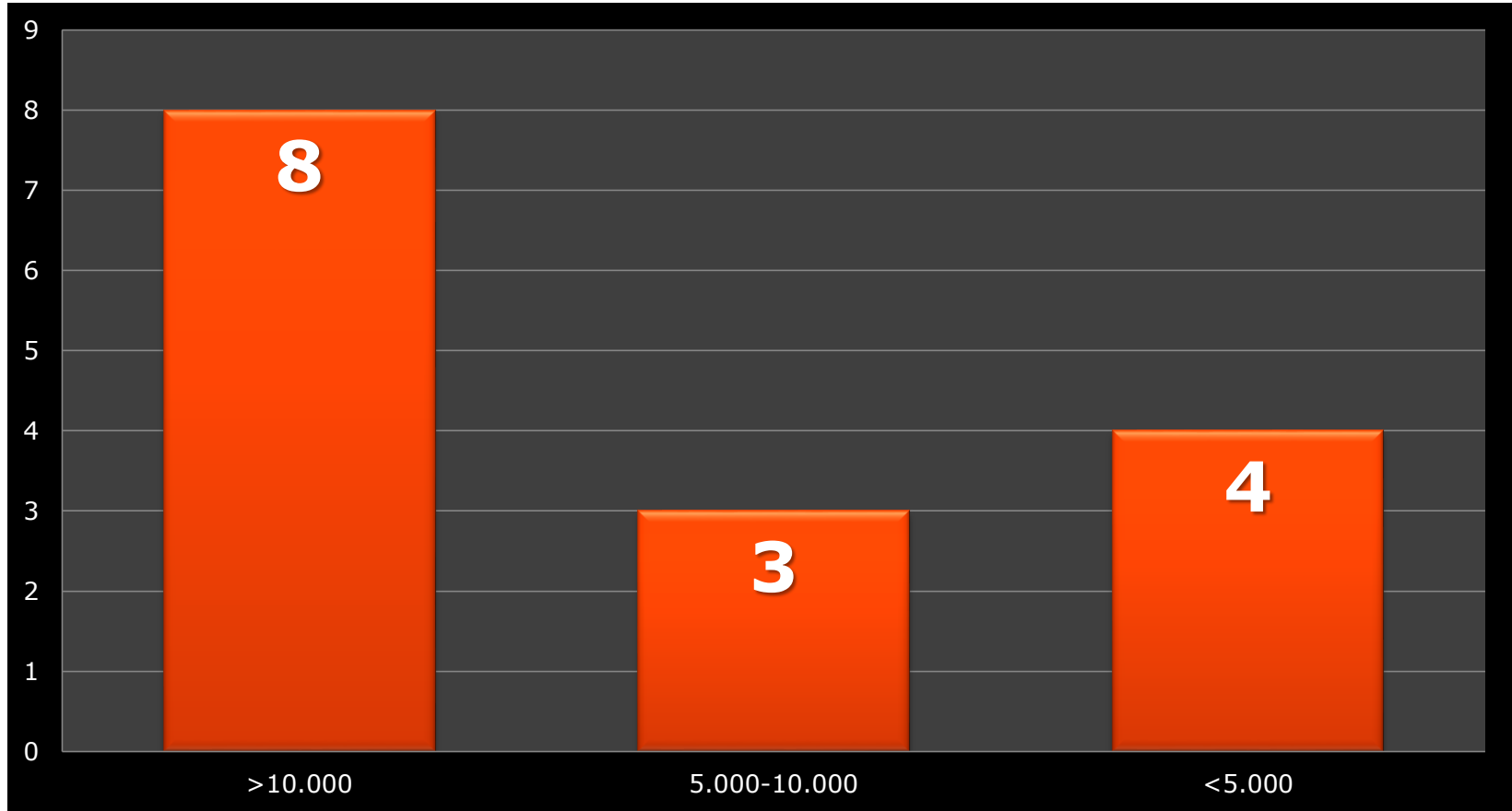
*Borusan Otomotiv Premium Kiralama, has been participating the research since Q3 2013.

*Otoplan Operasyonel Taşıt Kiralama, has been participating the research since Q2 2015.

*Beyaz Filo, has not participated the research since Q2 2014

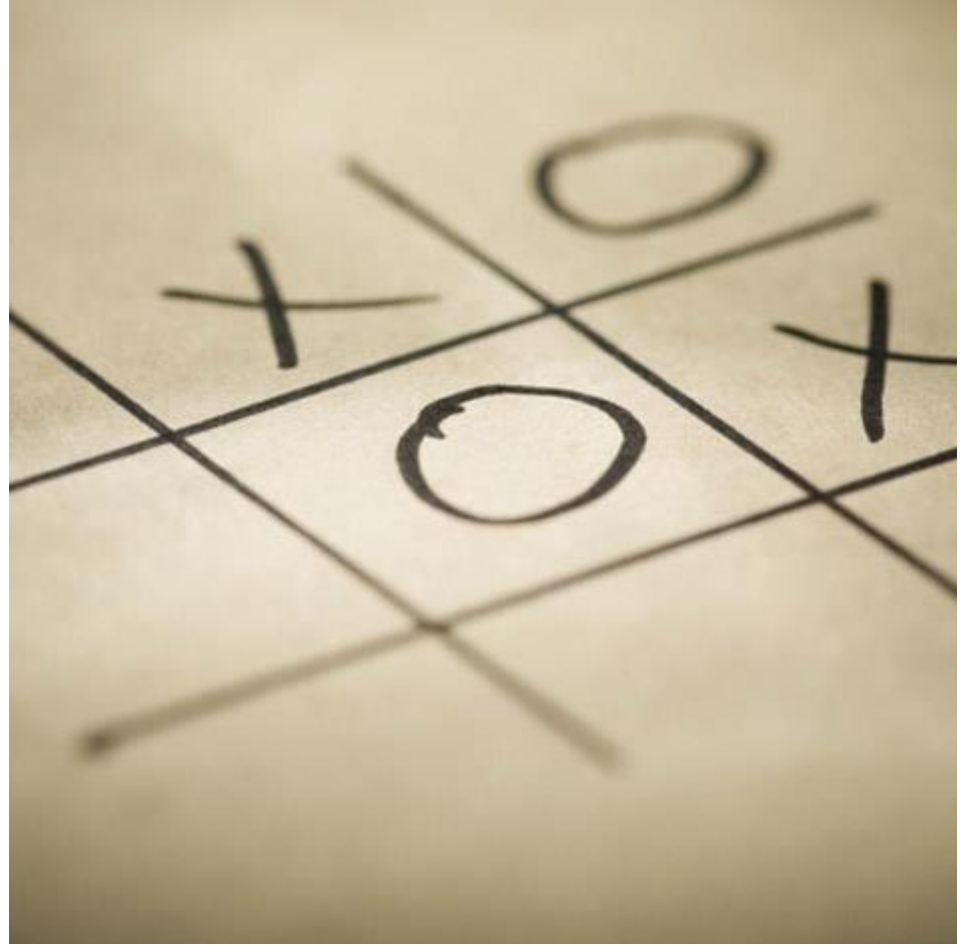
Participating Companies

Distribution according to the size of companies / End of 3rd Quarter of 2015



3

Summary

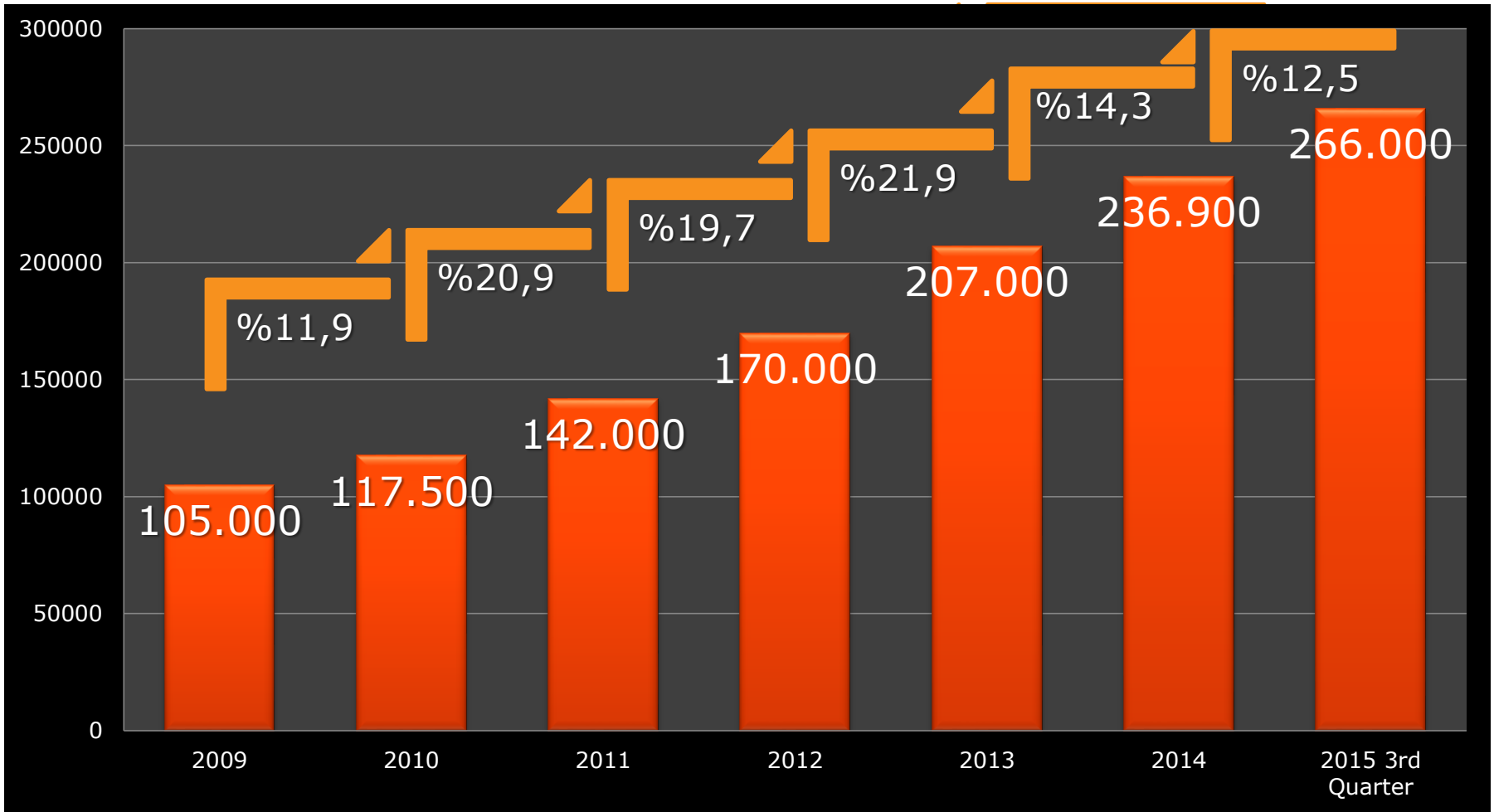


Participants and Sector Estimates

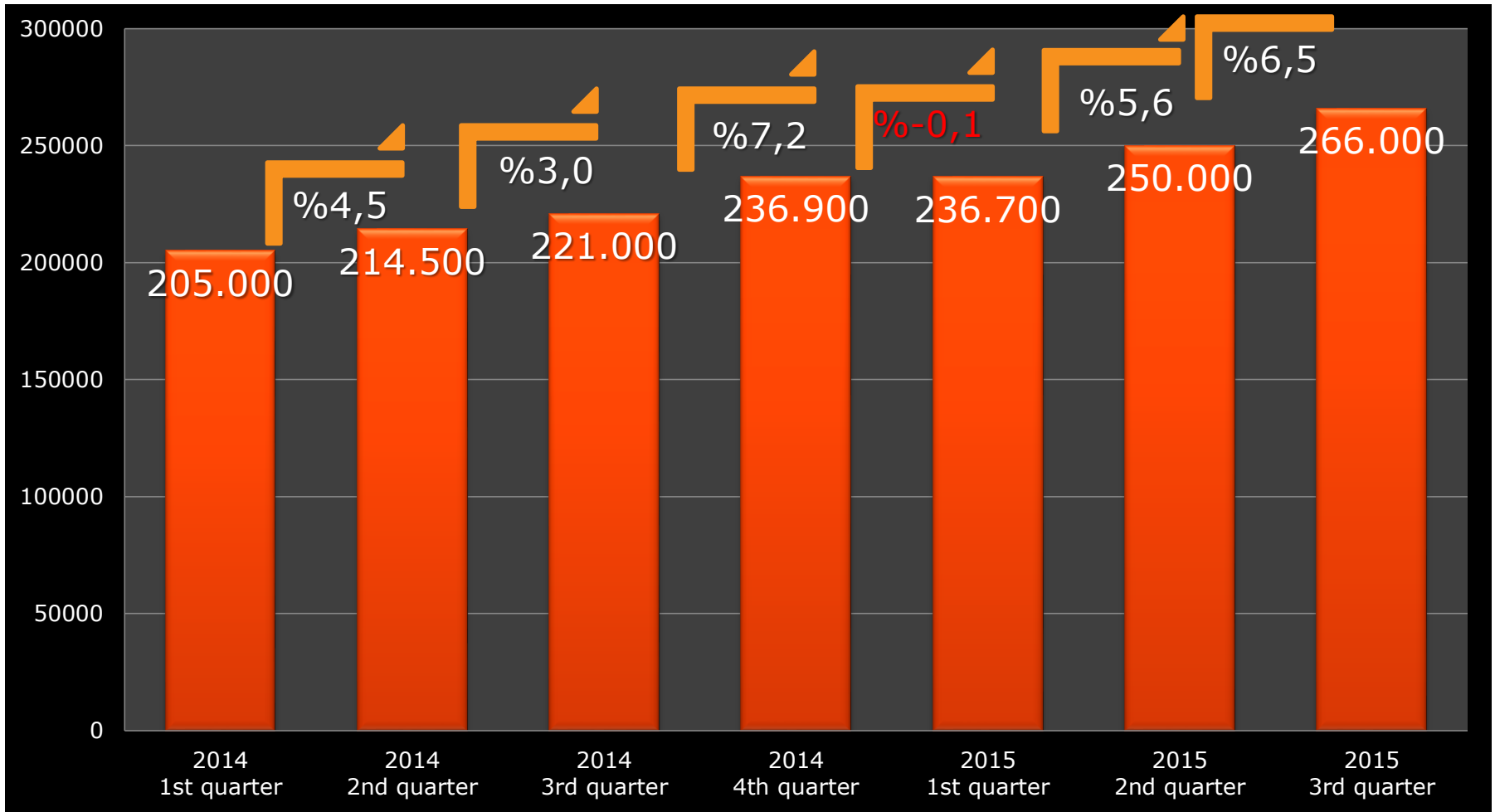
Summary/ End of 3rd Quarter of 2015

	Participants	Sector Estimates
Number of Vehicles	180.472	266.473
Number of Purchased Vehicles	55.133	81.898
Number of Sold Vehicles (2nd Hand)	35.120	52.355
Number of Customers	26.303	38.837
Amount of Purchased Vehicles (TL)	3.790.377.601	5.627.367.762
Amount of The Paid Taxes (TL) SCT+VAT+ MVT	1.786.394.726	2.652.674.355
Sum of Actives (TL)	11.382.969.871	16.807.339.257

Estimated Growth of Vehicle Park of the Sector – Year Based

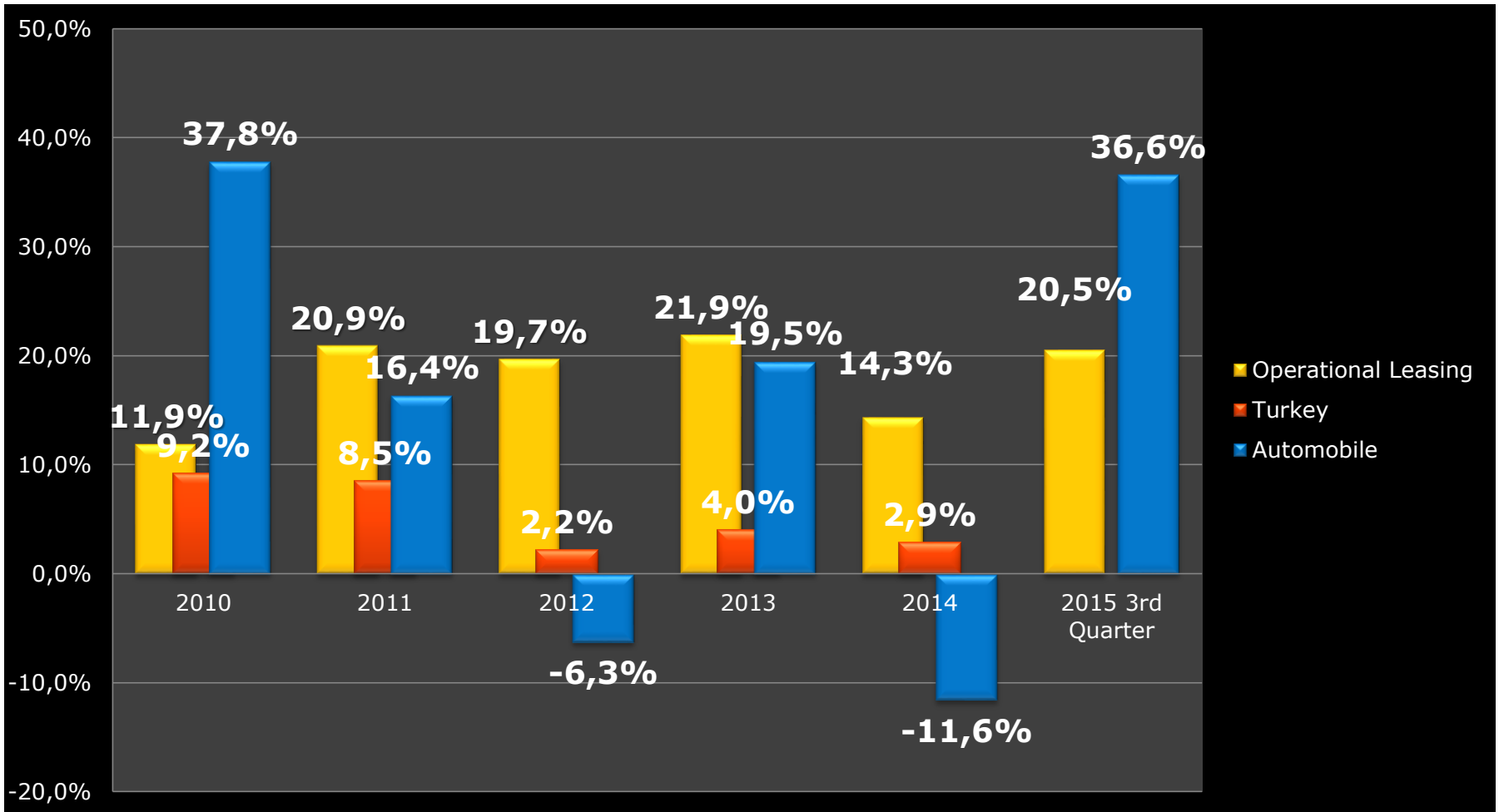


Estimated Growth of Vehicle Park of the Sector – Quarter Based



Growth Rates / Benchmarks

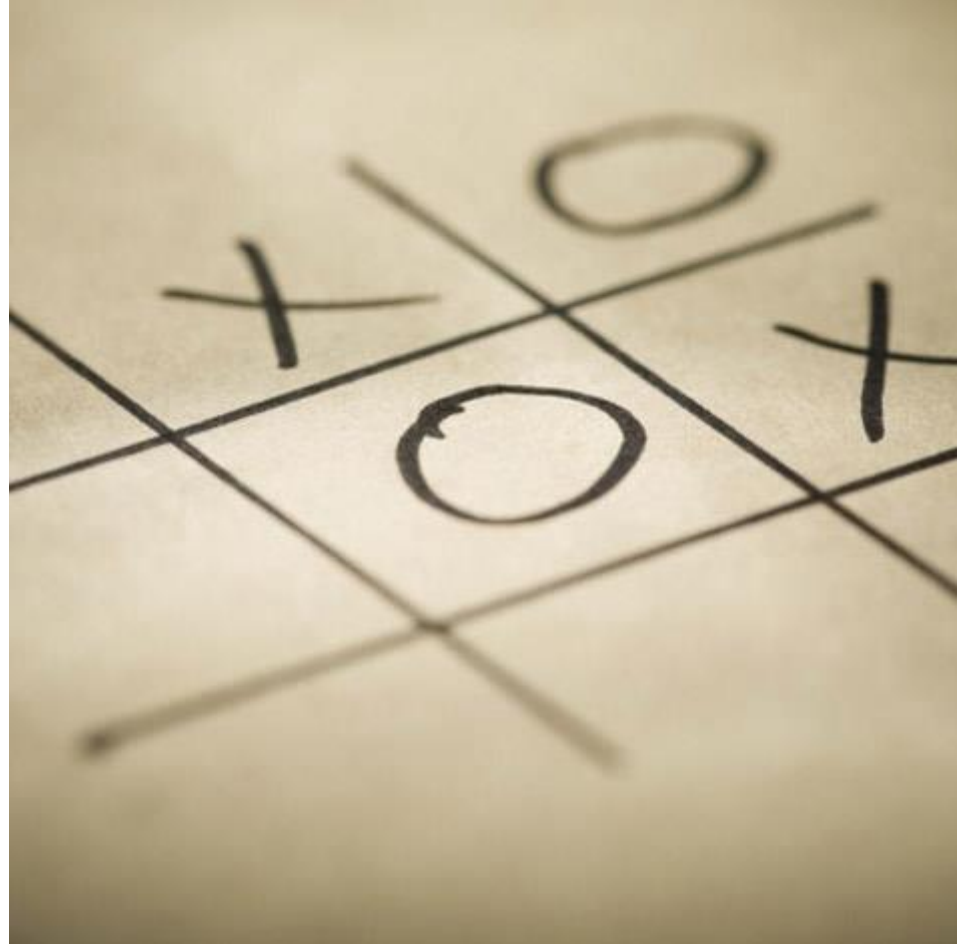
Turkey Economy / Automotive Sector / Operational Leasing Sector



*3rd Quarter of 2015 Turkey growth rate hasn't been announced yet,

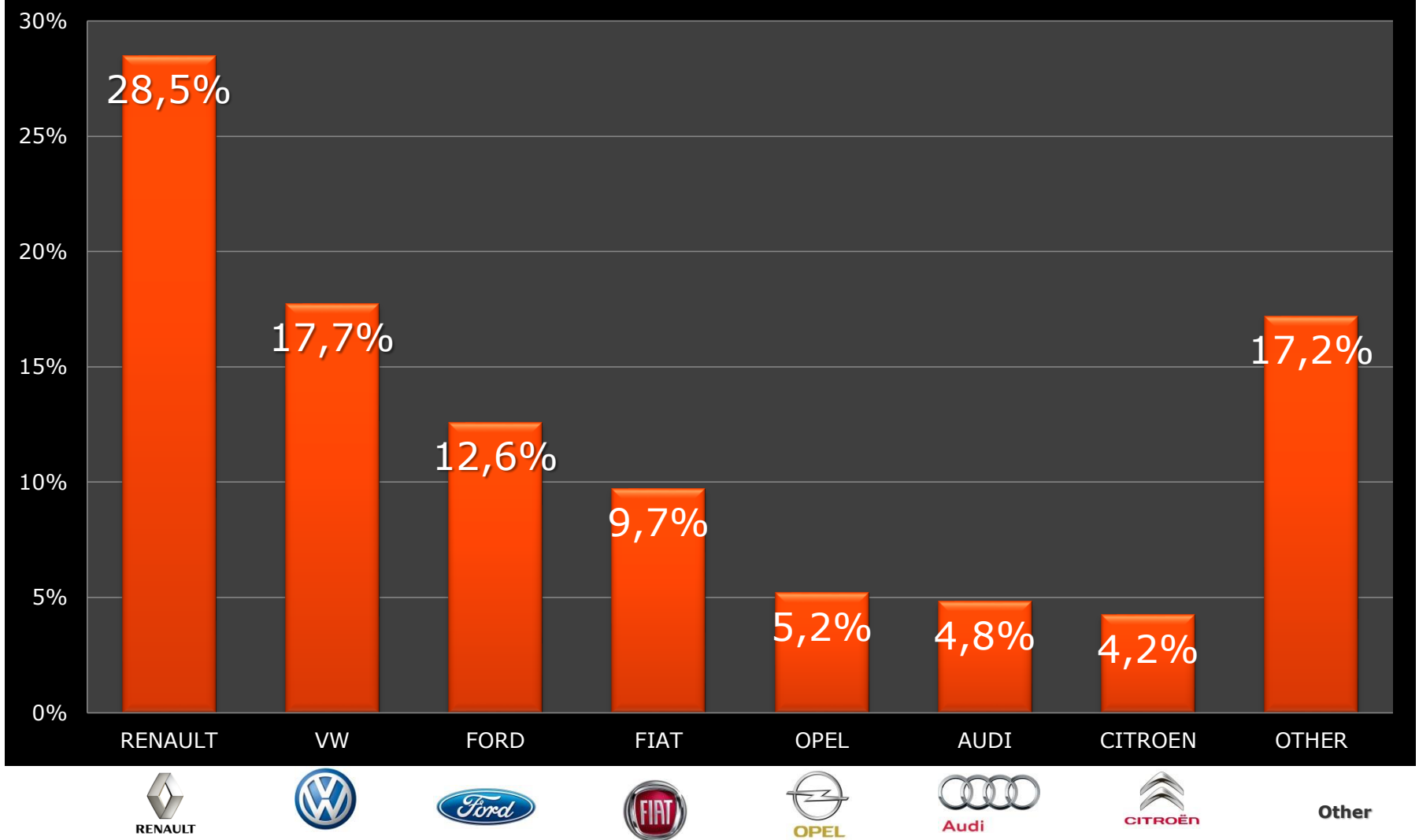
4

Vehicle Park and Its Features



Vehicle Park of Sector / Make Based Distribution

End of 3rd Quarter of 2015



TOKKDER Operational Leasing Sector Report

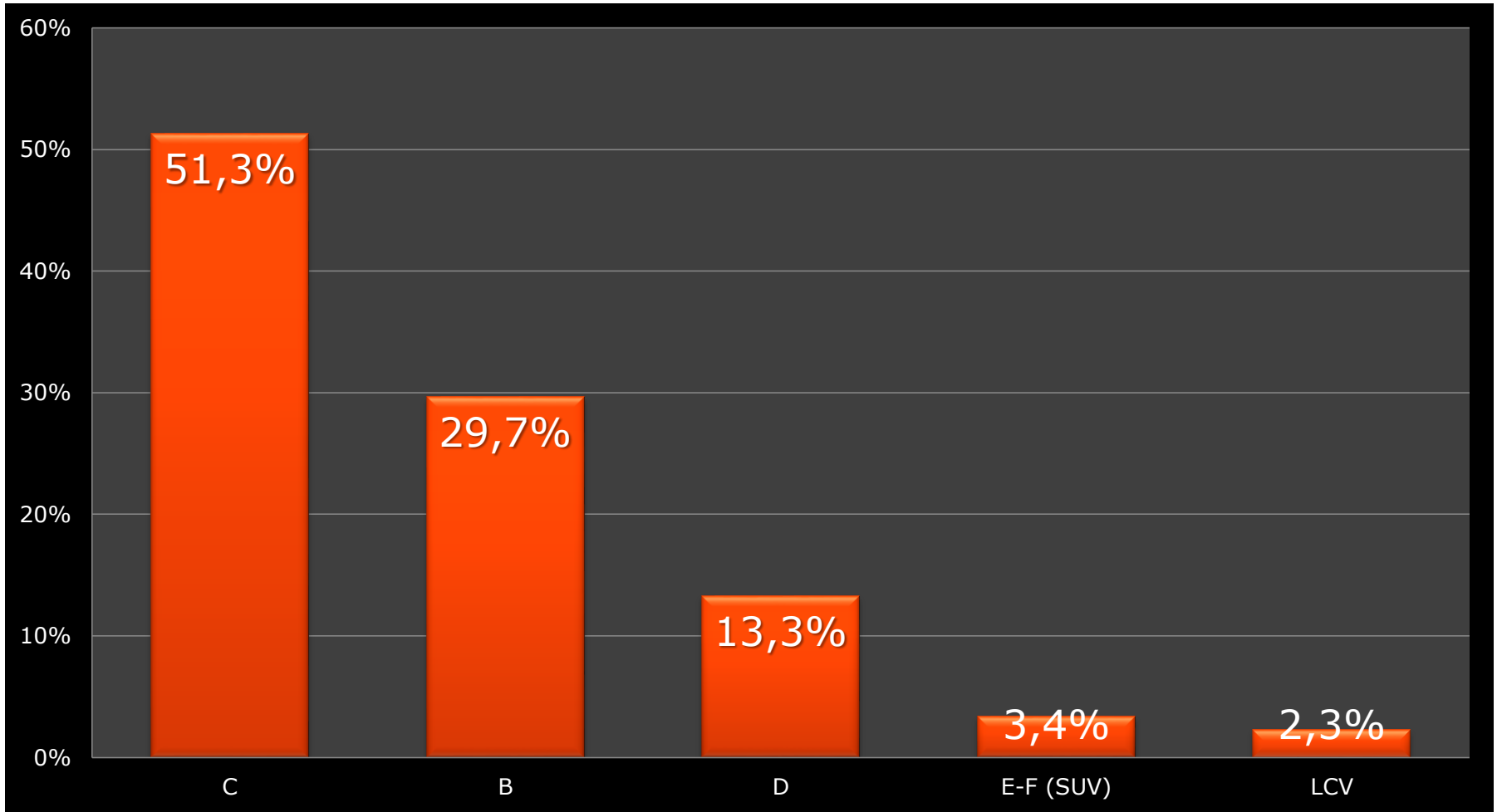
©TNS 2015



member of
Leaseurope

Vehicle Features of Sector / Vehicle Segments

End of 3rd Quarter of 2015



TOKKDER Operational Leasing Sector Report

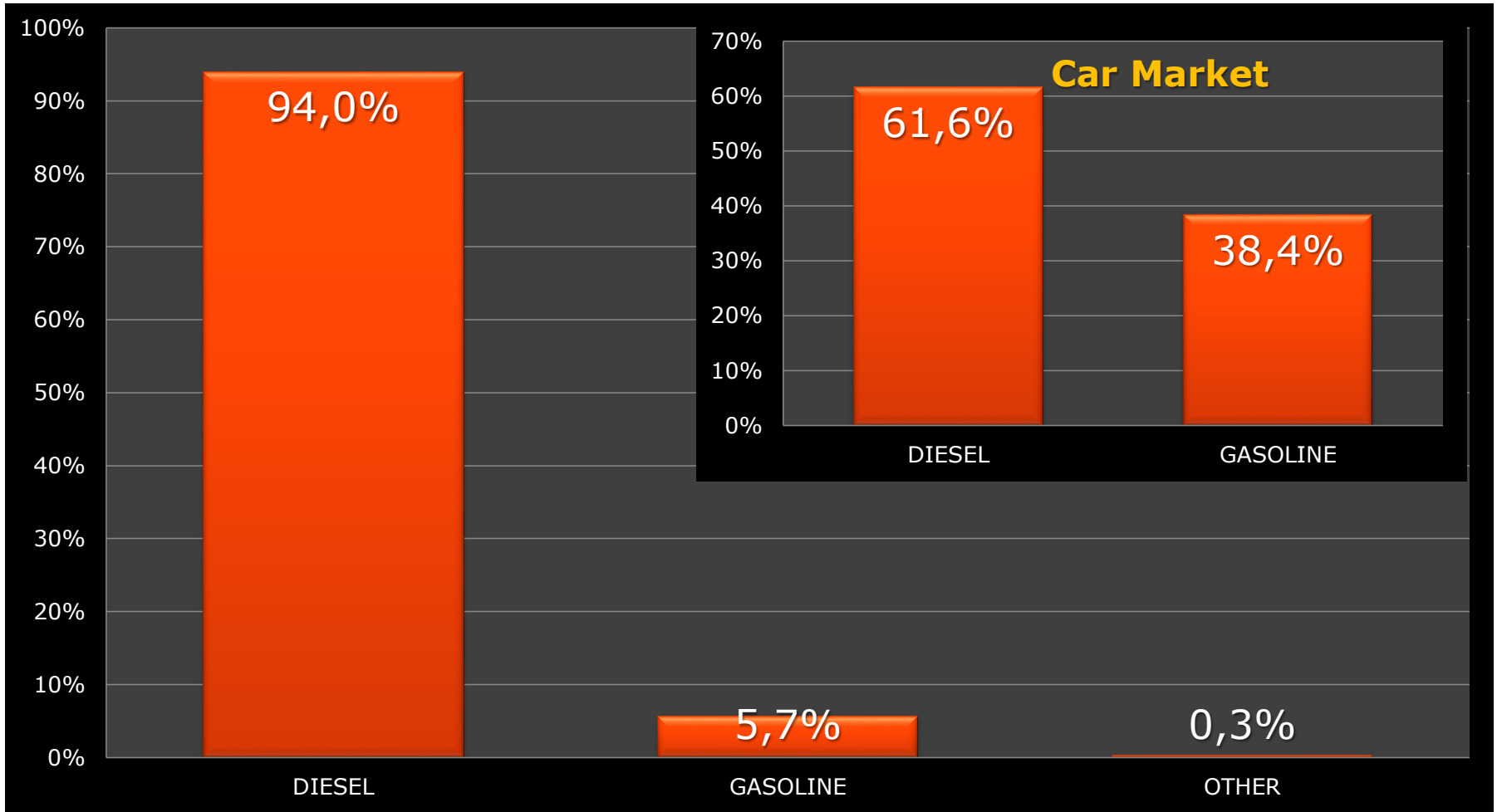
©TNS 2015



member of
Leaseurope

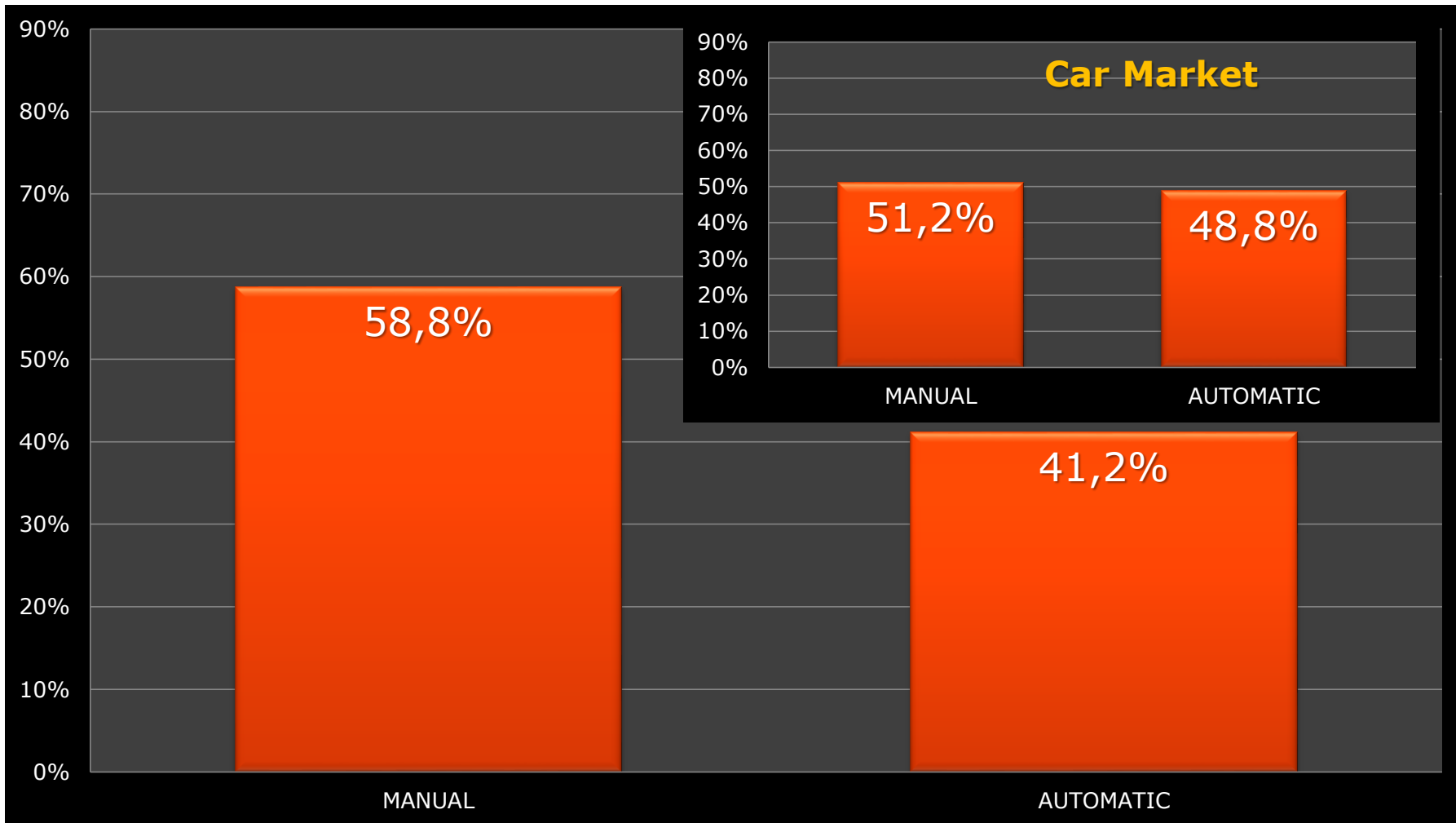
Vehicle Features of Sector / Fuel Type

End of 3rd Quarter of 2015



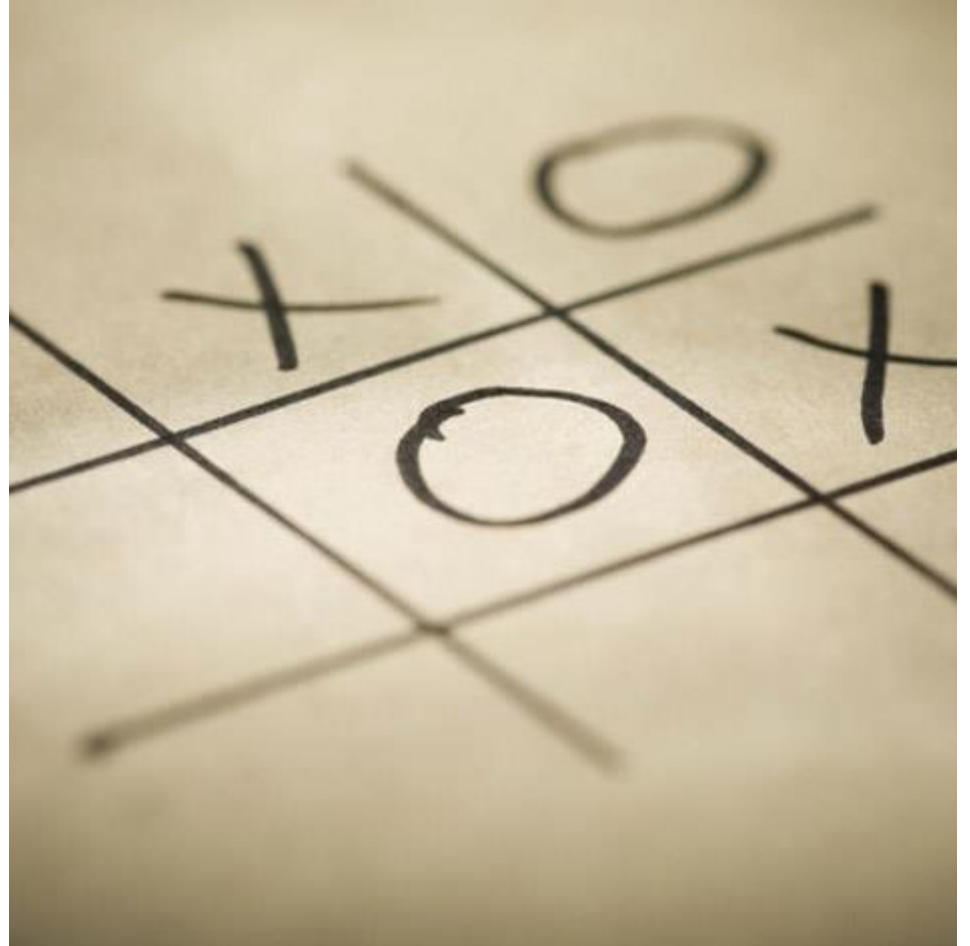
Vehicle Features of Sector / Transmission Type

End of 3rd Quarter of 2015



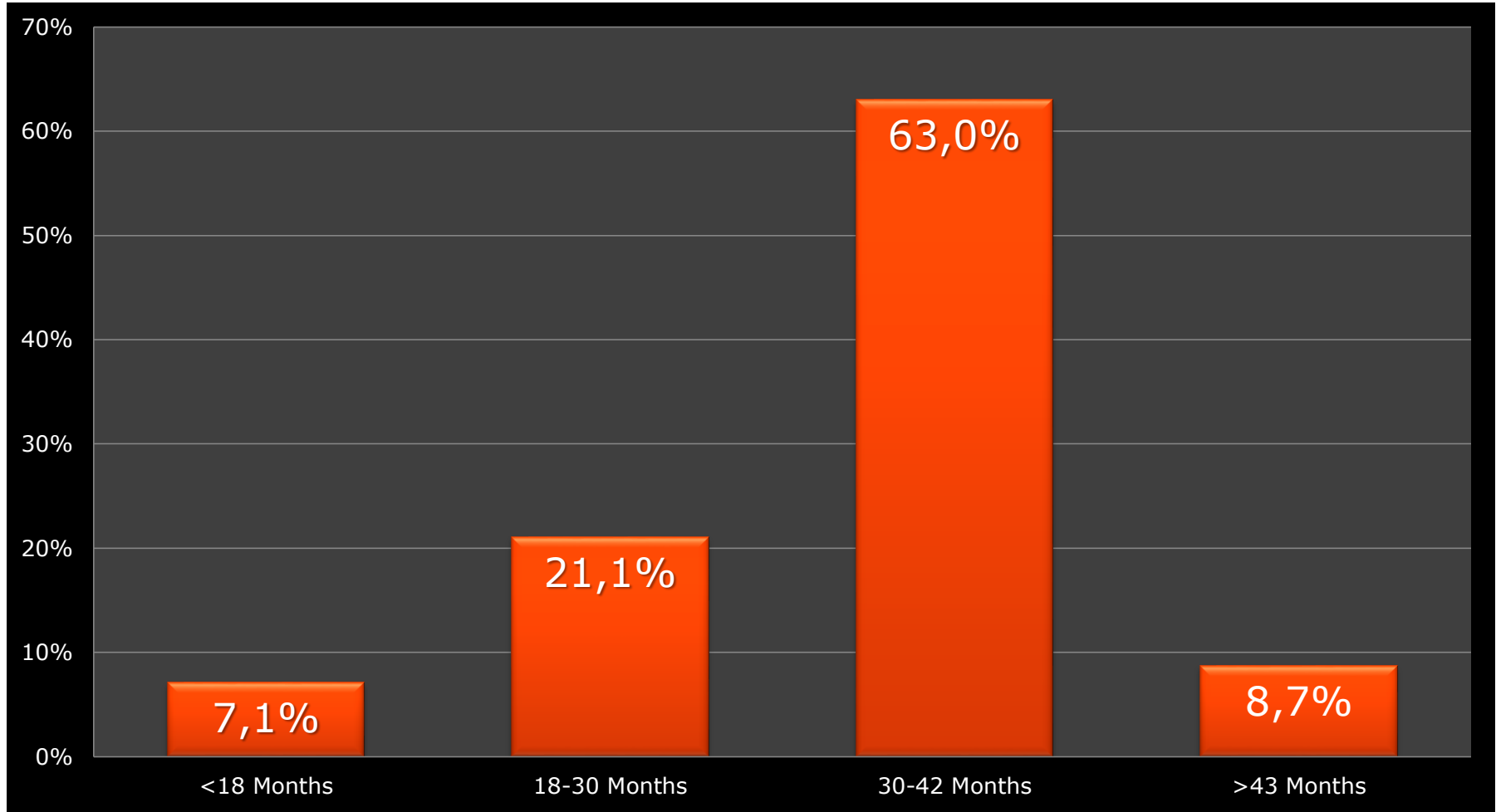
5

Contract Structure



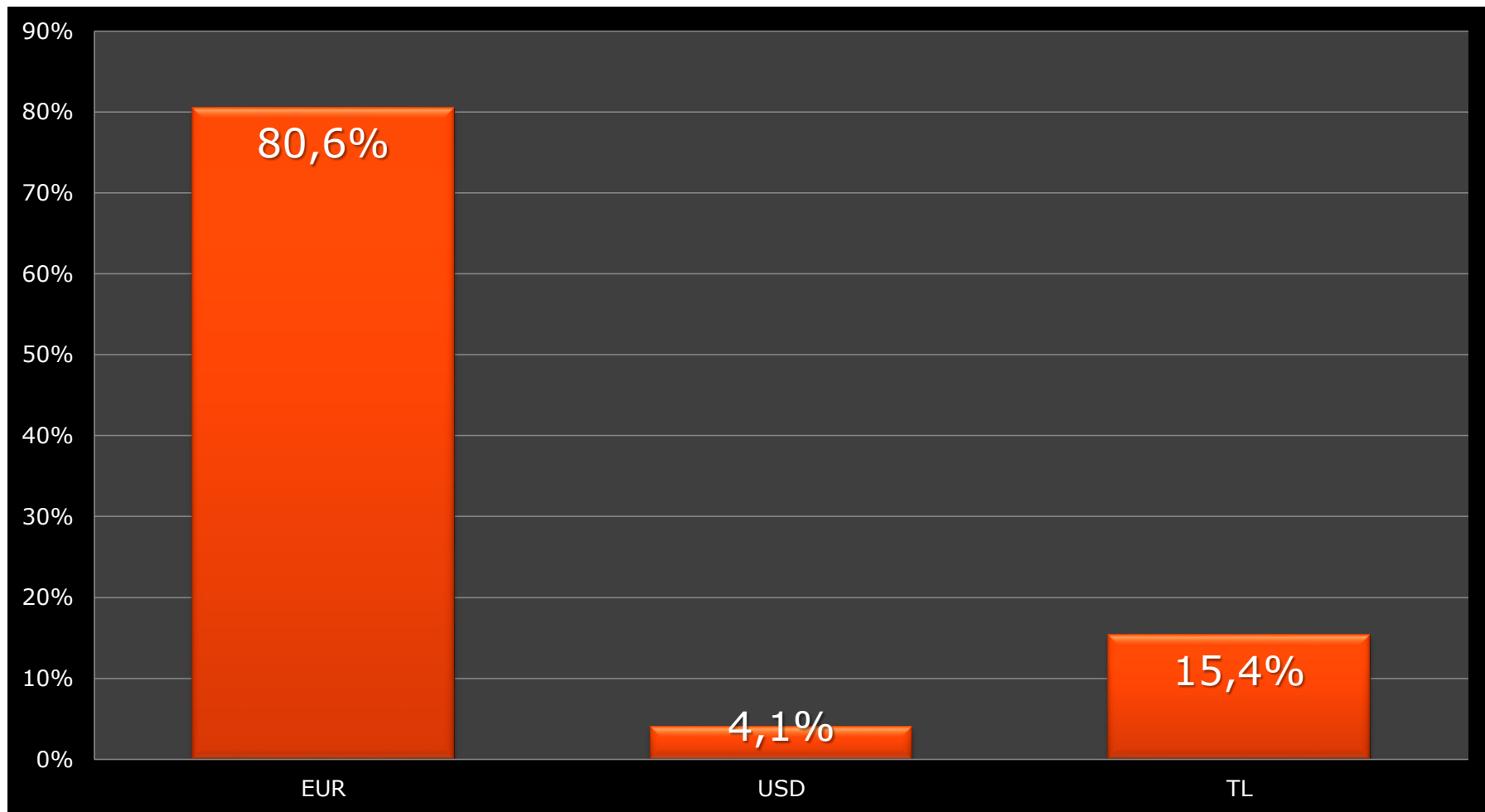
Contract Features of Sector / Term Based

End of 3rd Quarter of 2015



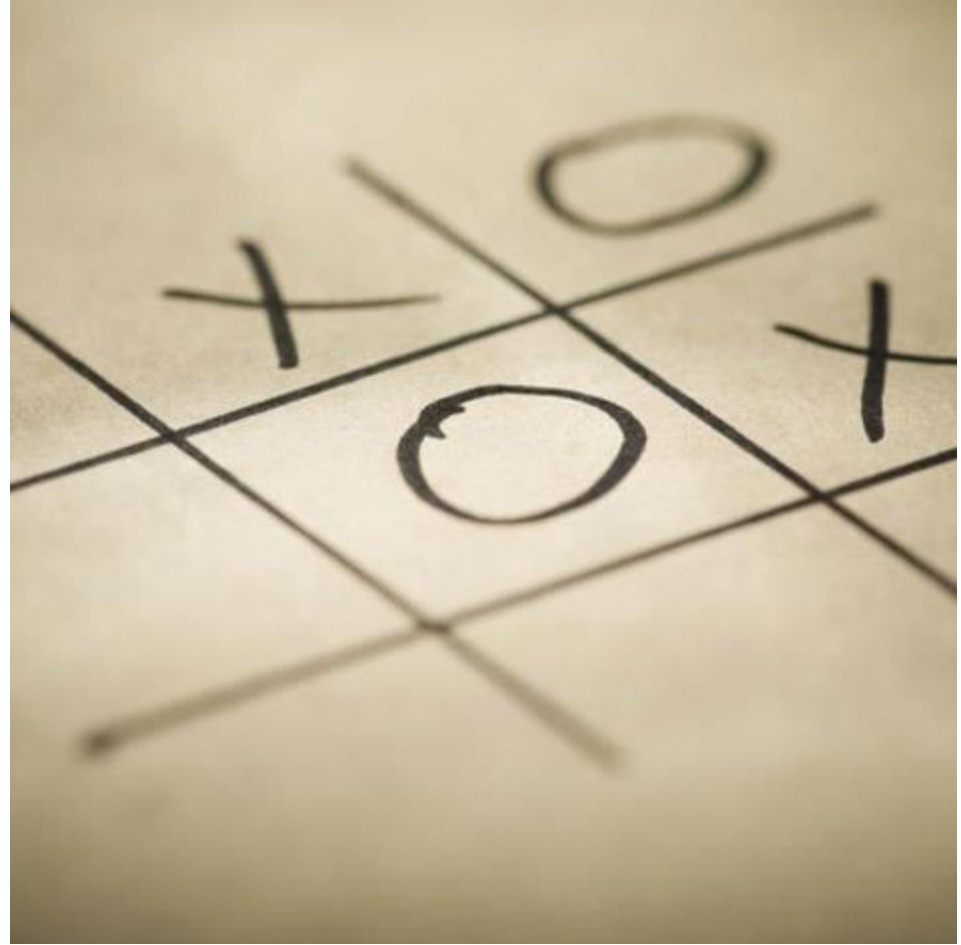
Contract Features of Sector / Currency Based

End of 3rd Quarter of 2015



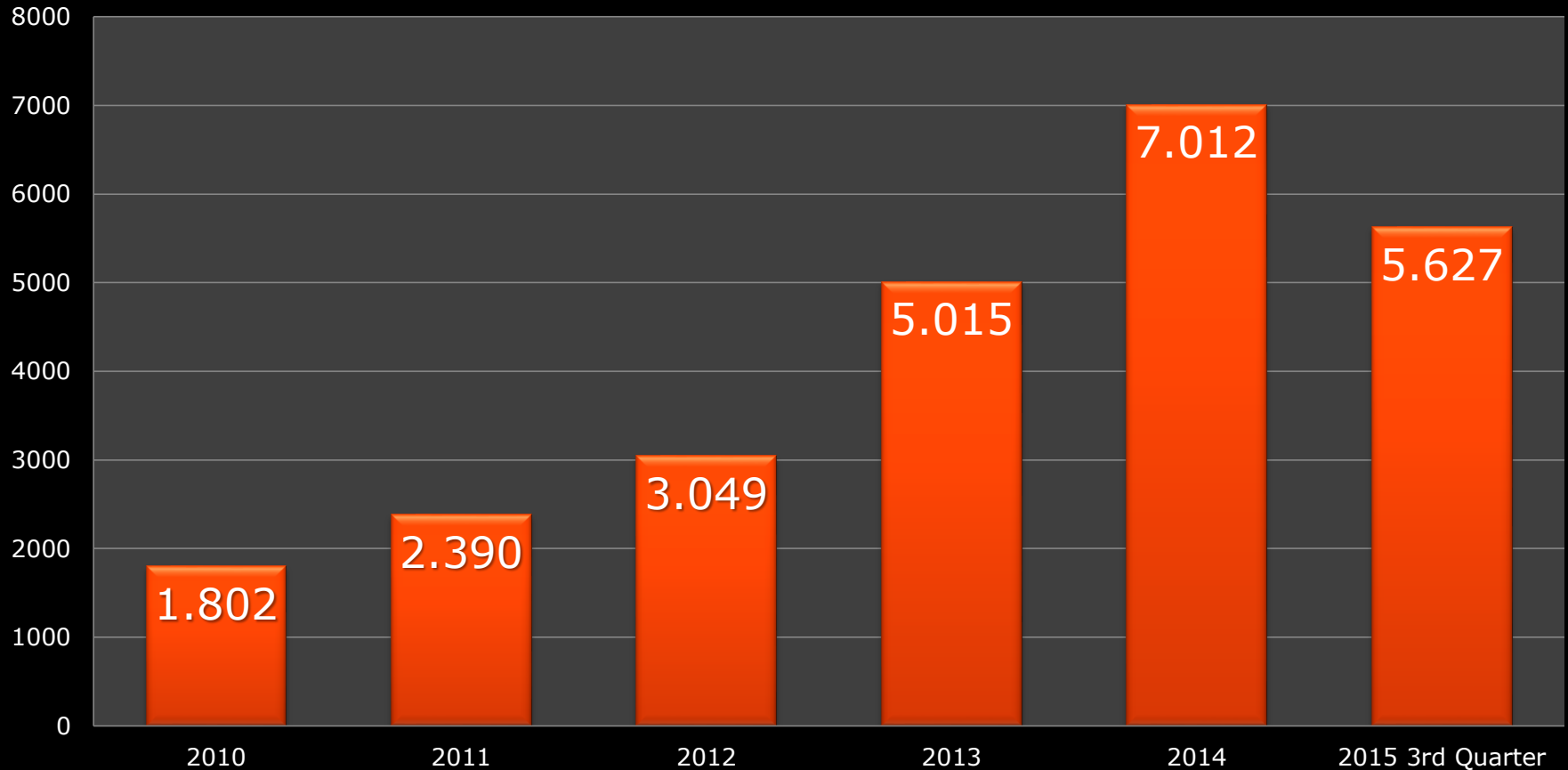
6

Vehicle Investments, Vehicle Purchases, Vehicle Sales and Paid Taxes



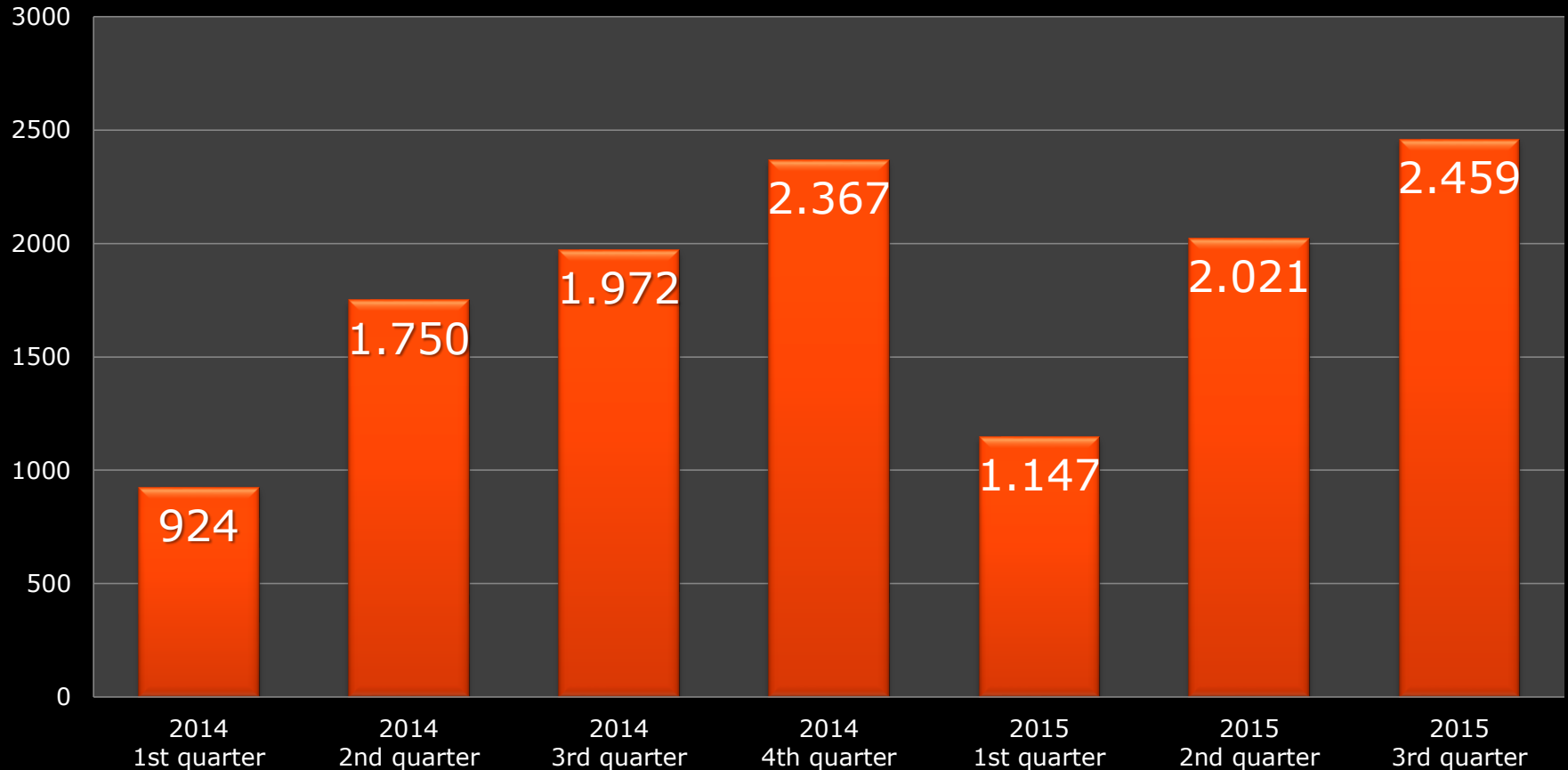
Sector Growth – Year Based

Total Amount of Vehicle Purchases/ Million TL



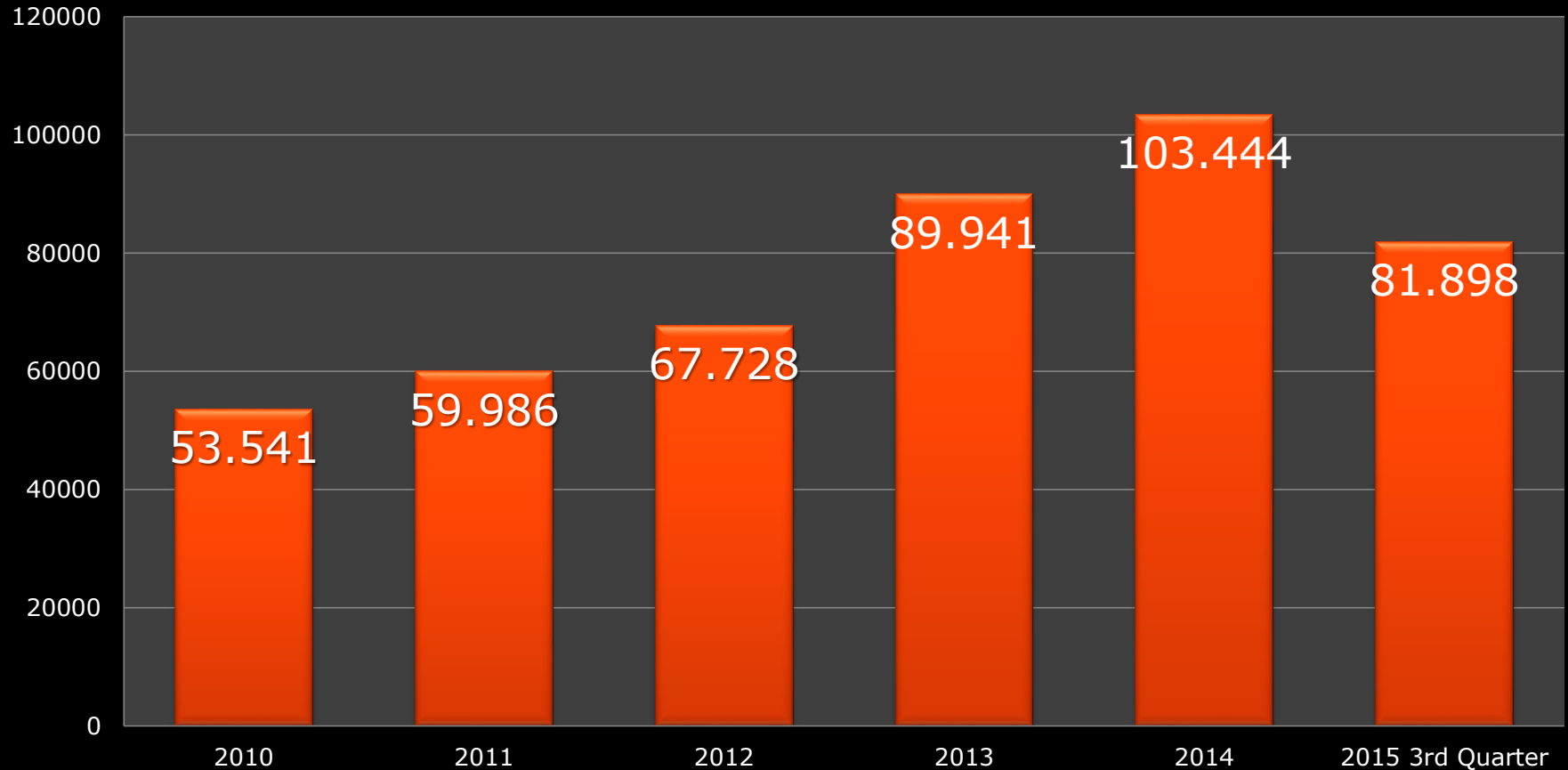
Sector Growth – Quarter Based

Amount of Vehicle Purchases/ Million TL



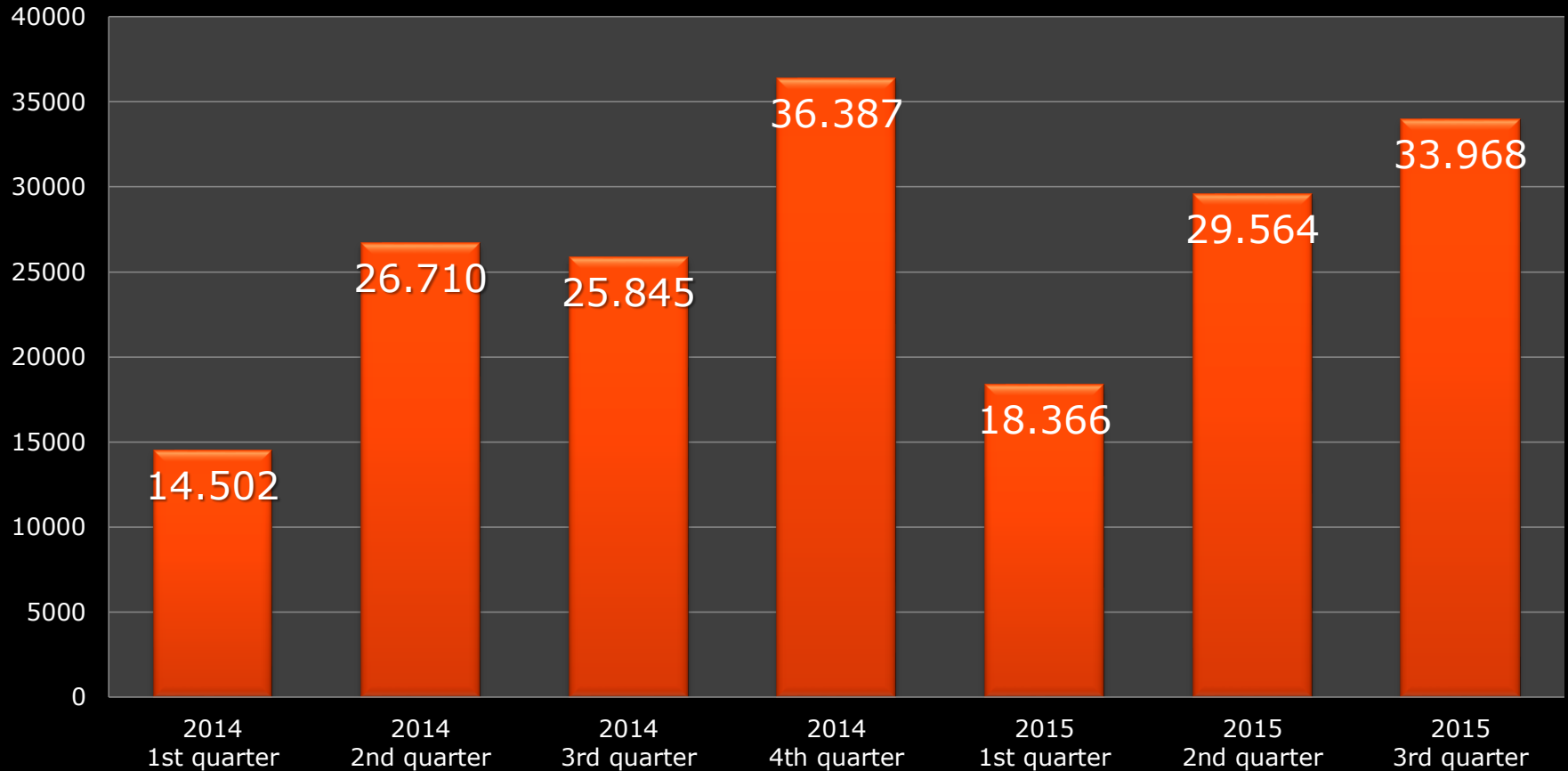
Sector Growth – Year Based

Number of Purchased Vehicles

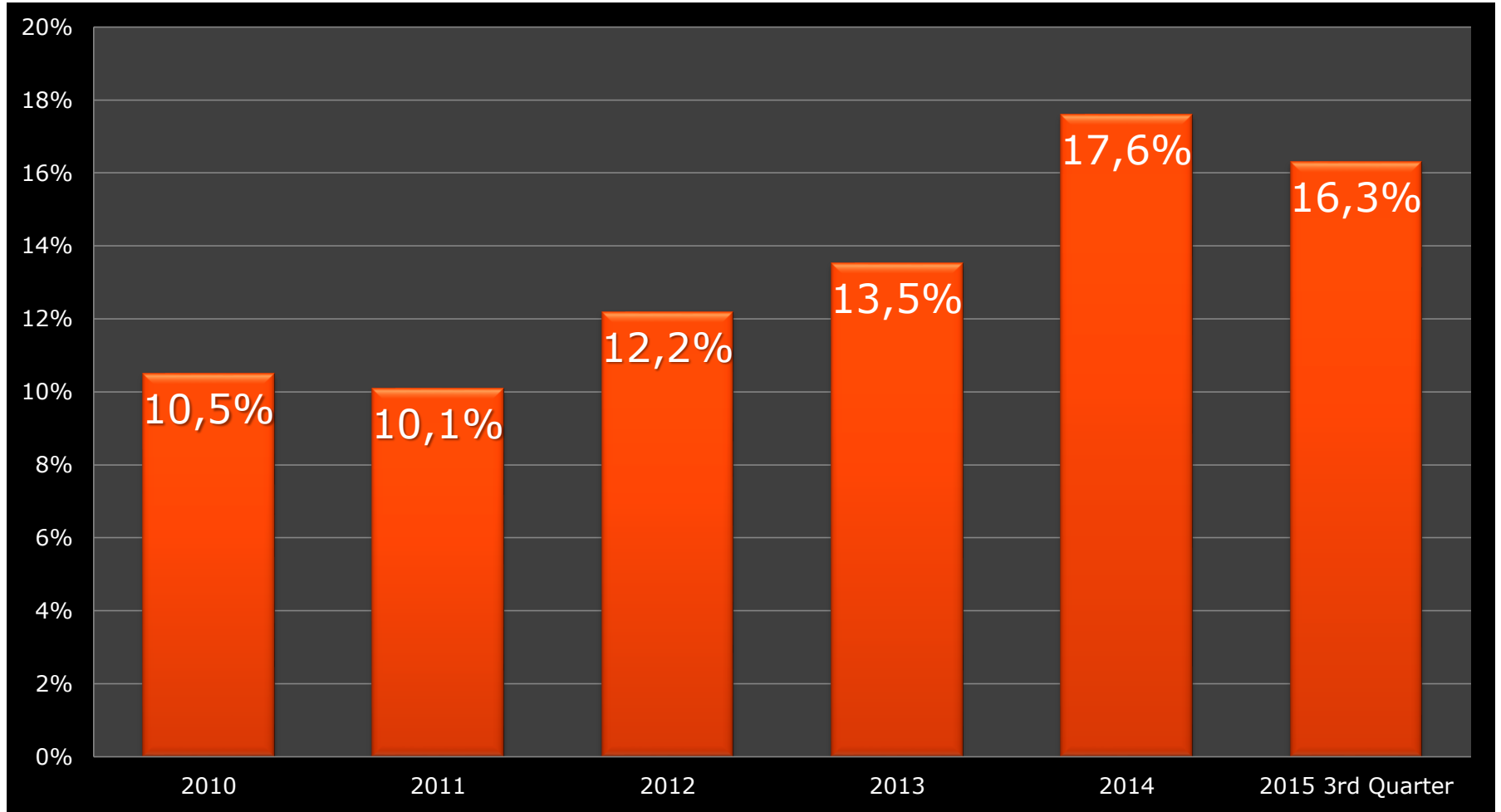


Sector Growth – Quarter Based

Number of Purchased Vehicles



Operational Leasing / Share in Automobile Purchases



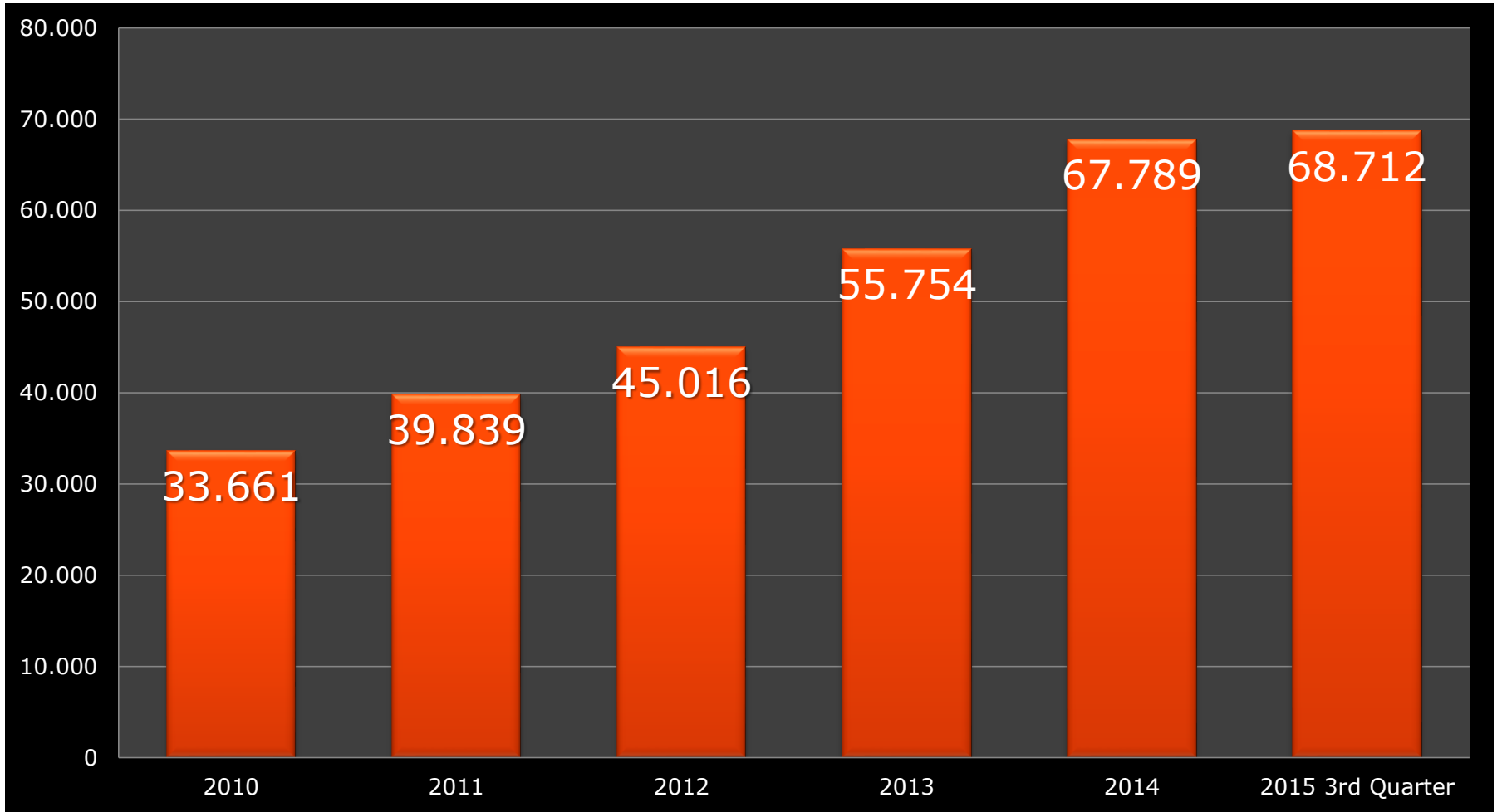
TOKKDER Operational Leasing Sector Report



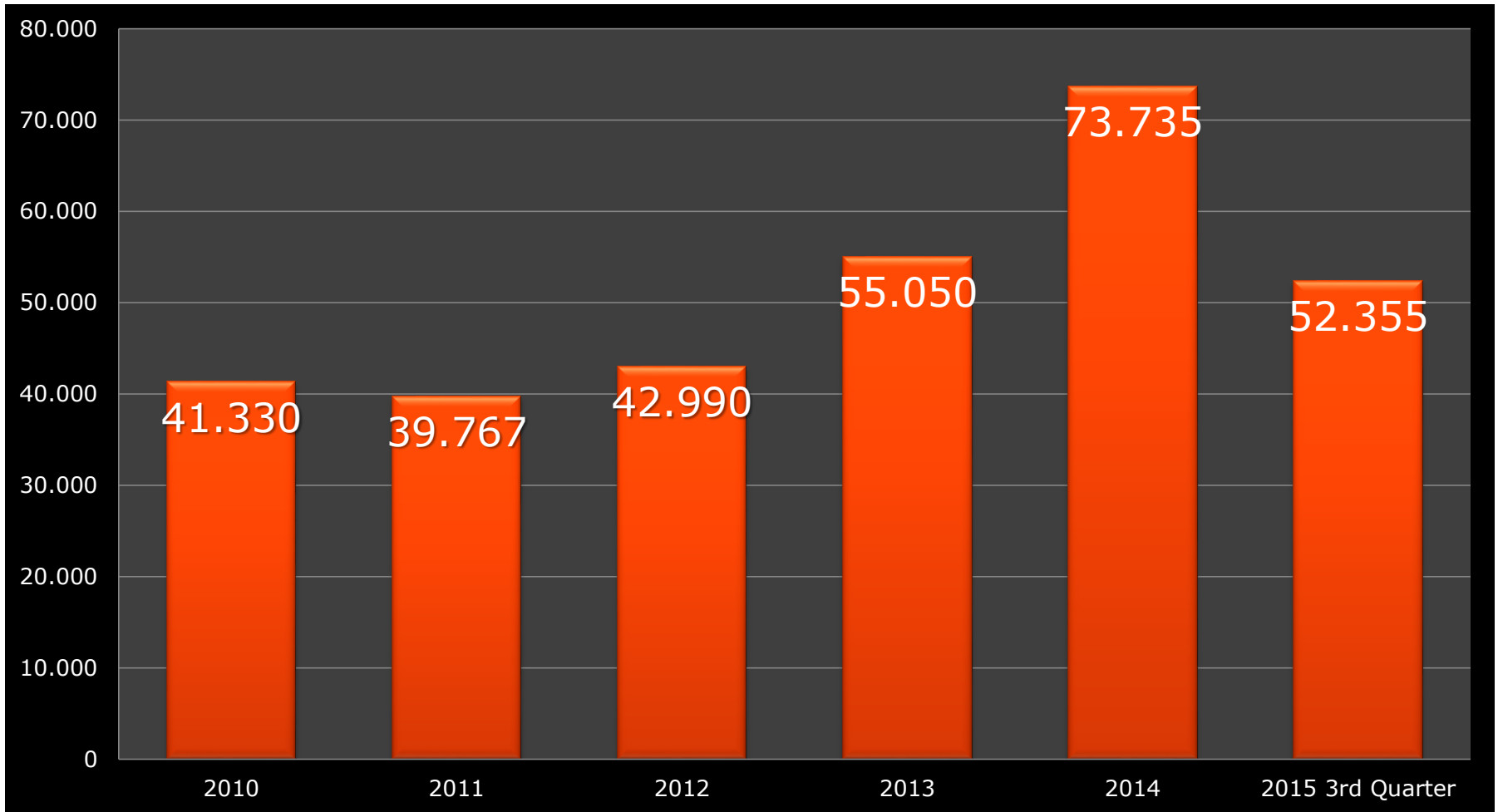
©TNS 2015



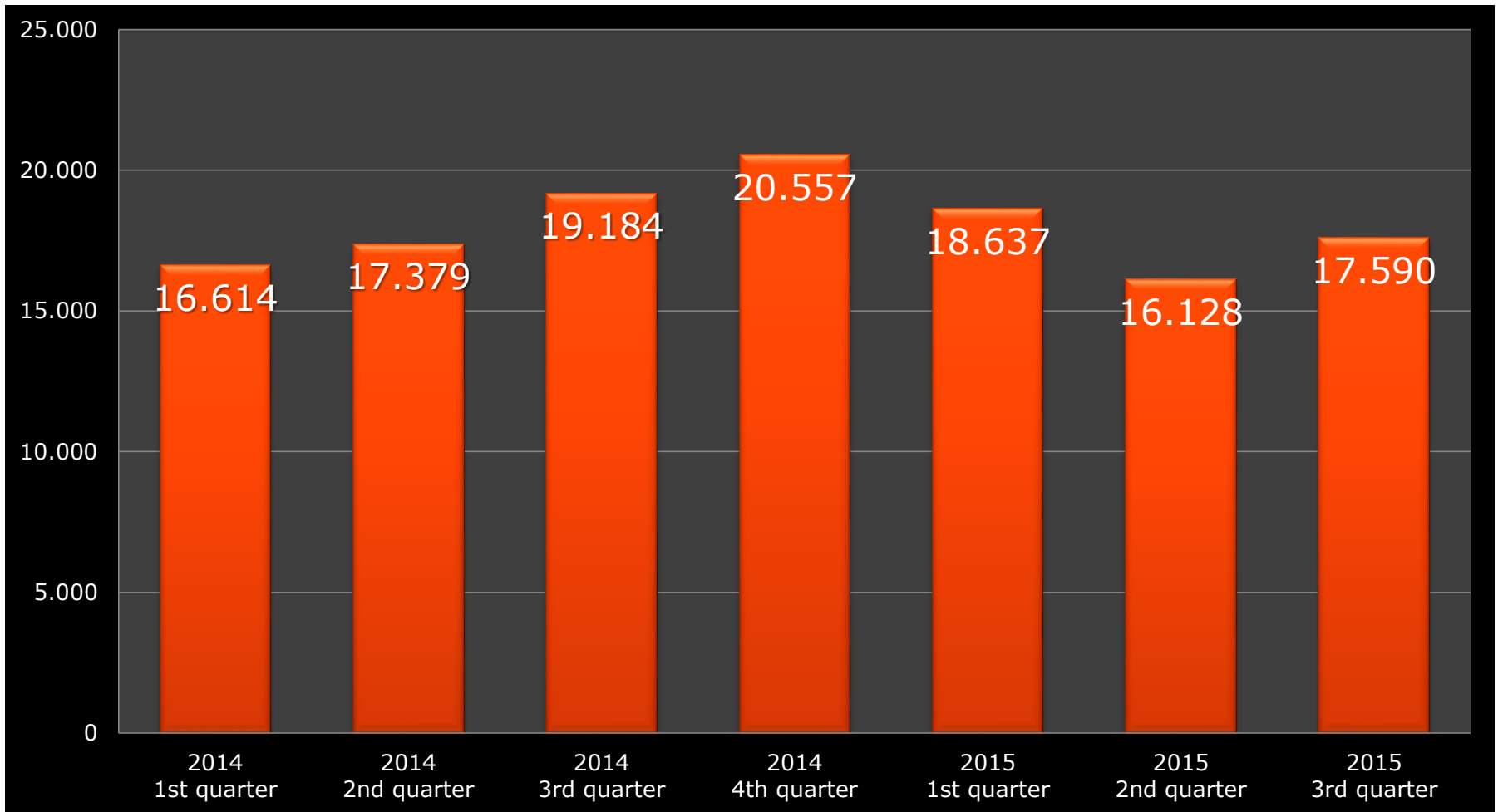
Average Per Unit Vehicle Purchase Amount of The Sector / TL



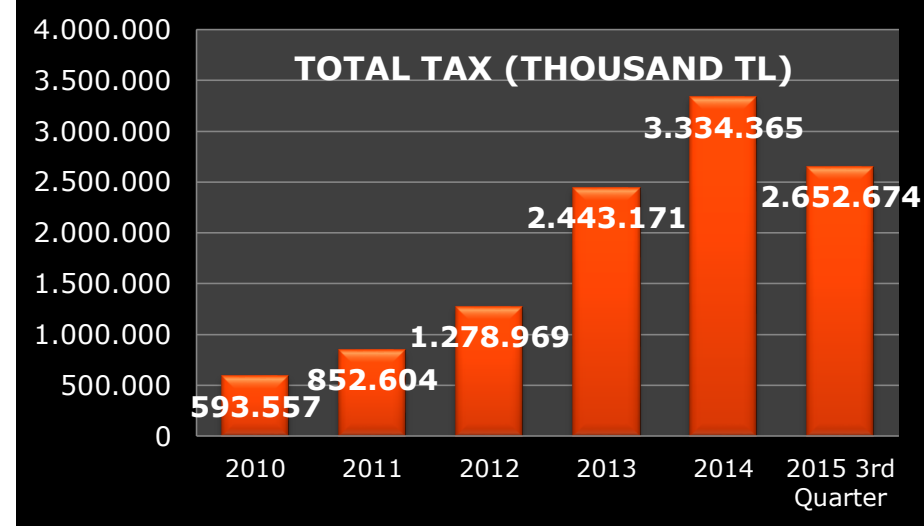
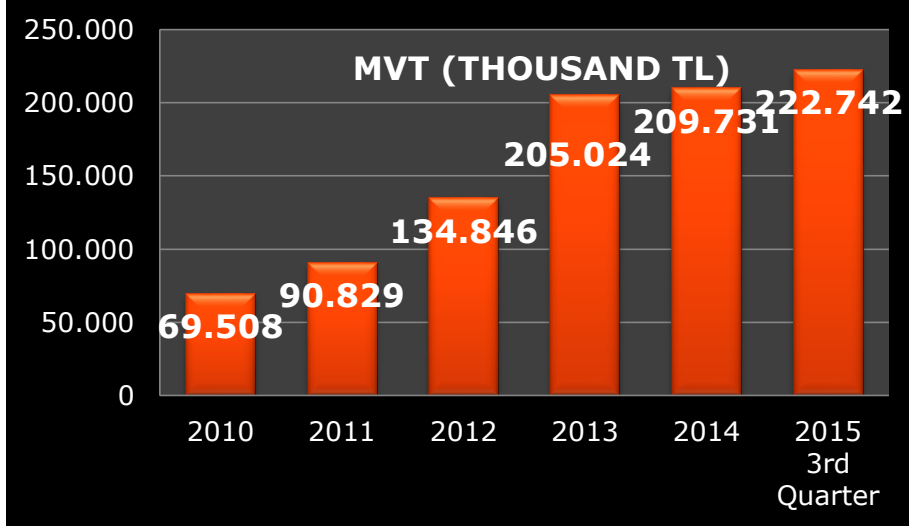
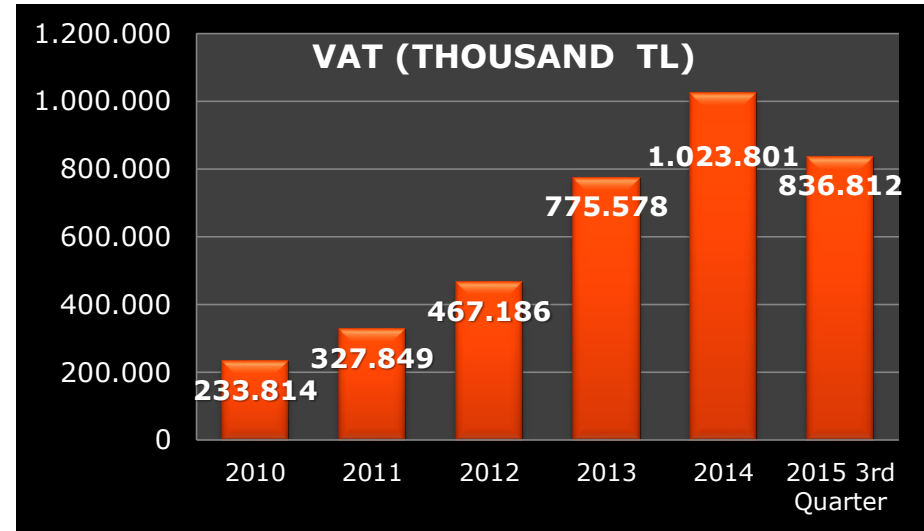
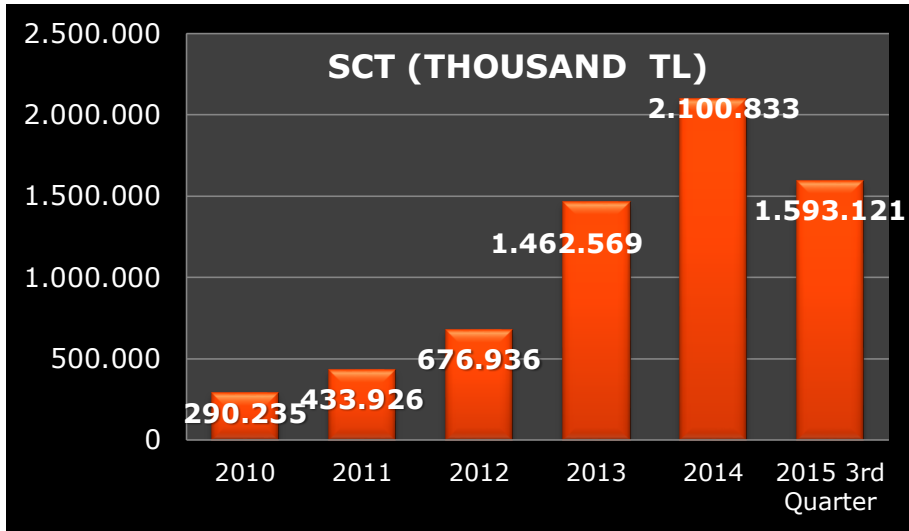
Estimated Total Vehicle Sales Volume of The Sector– Year Based



Estimated Total Vehicle Sales Volume of The Sector – Quarter Based



Sector Tax Trend



TOKKDER Operational Leasing Sector Report

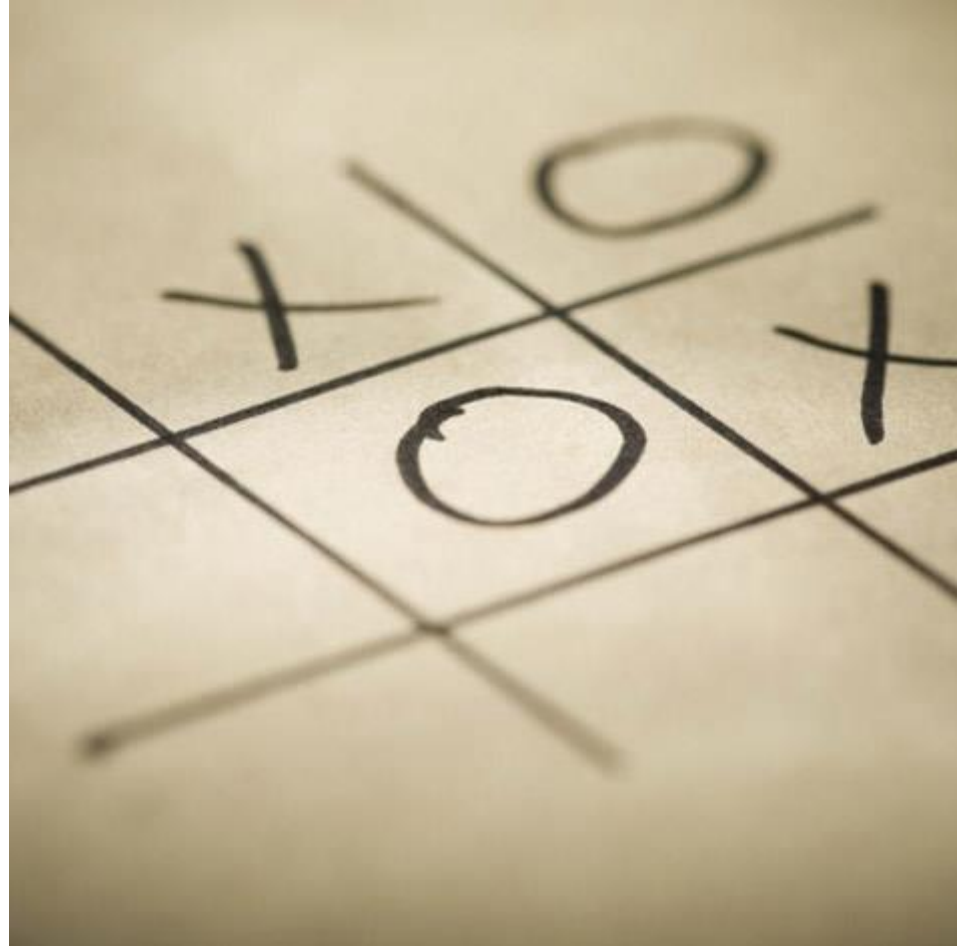
©TNS 2015



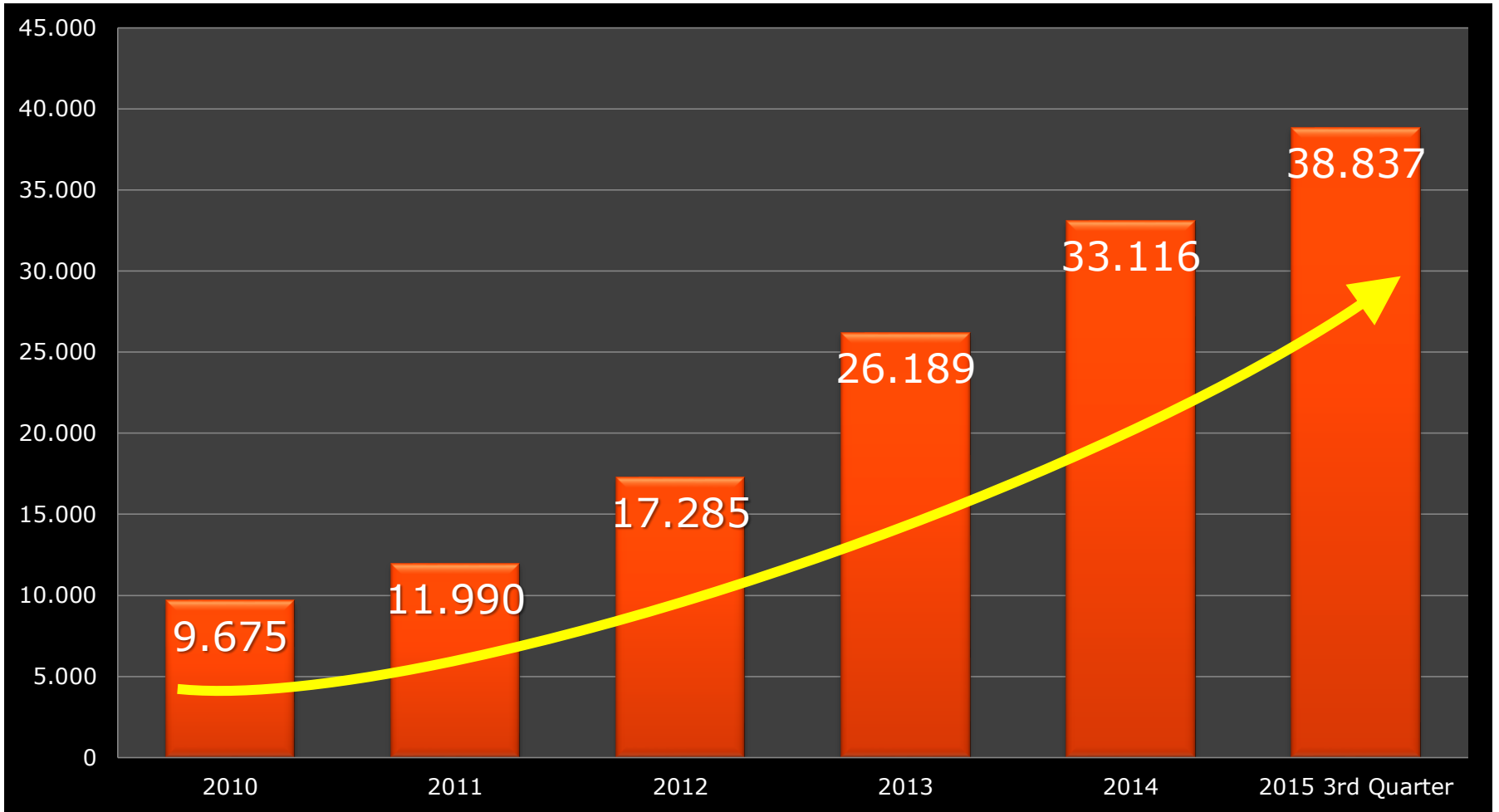
member of
Leaseurope

7

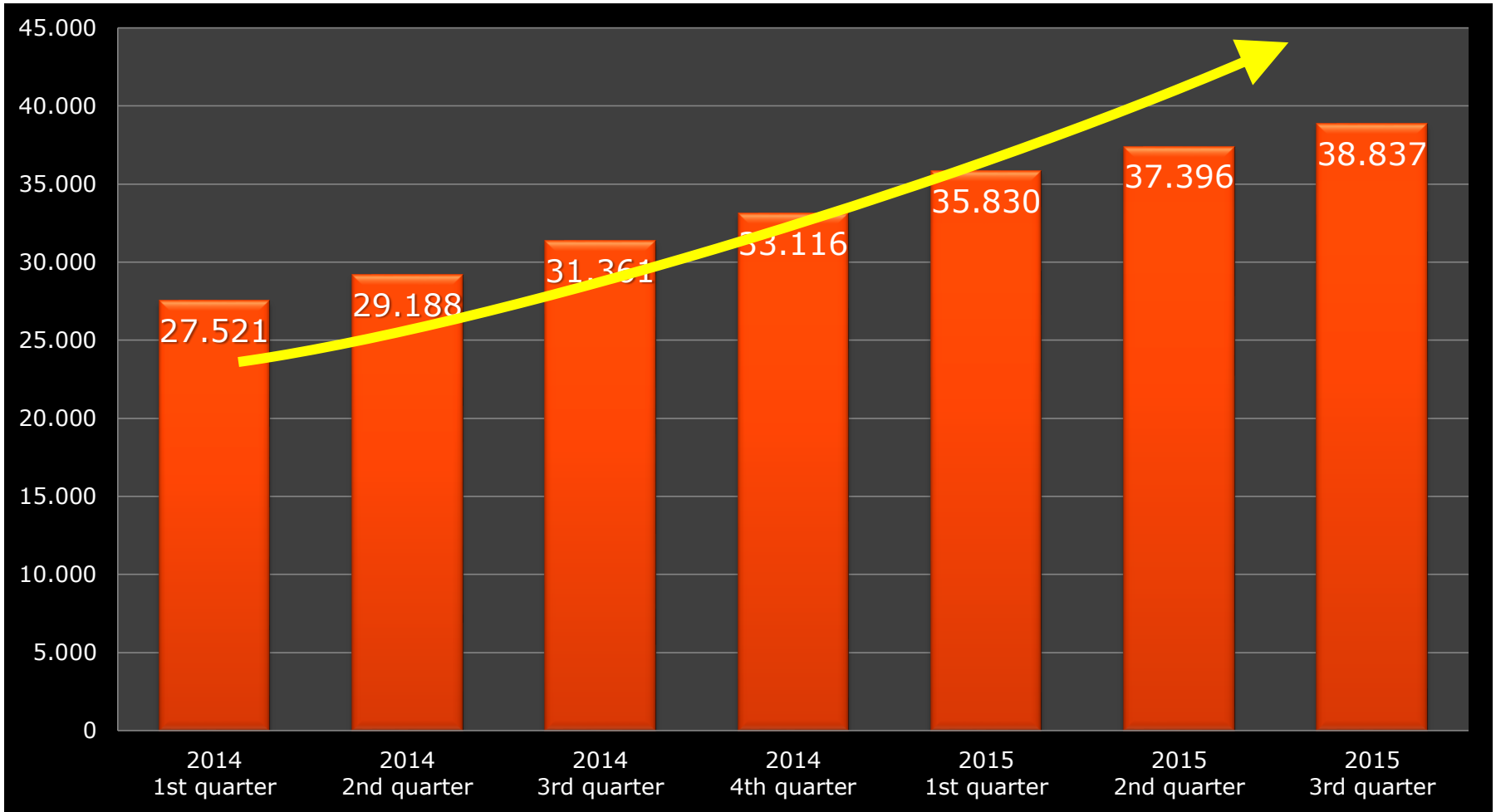
Number of Customers



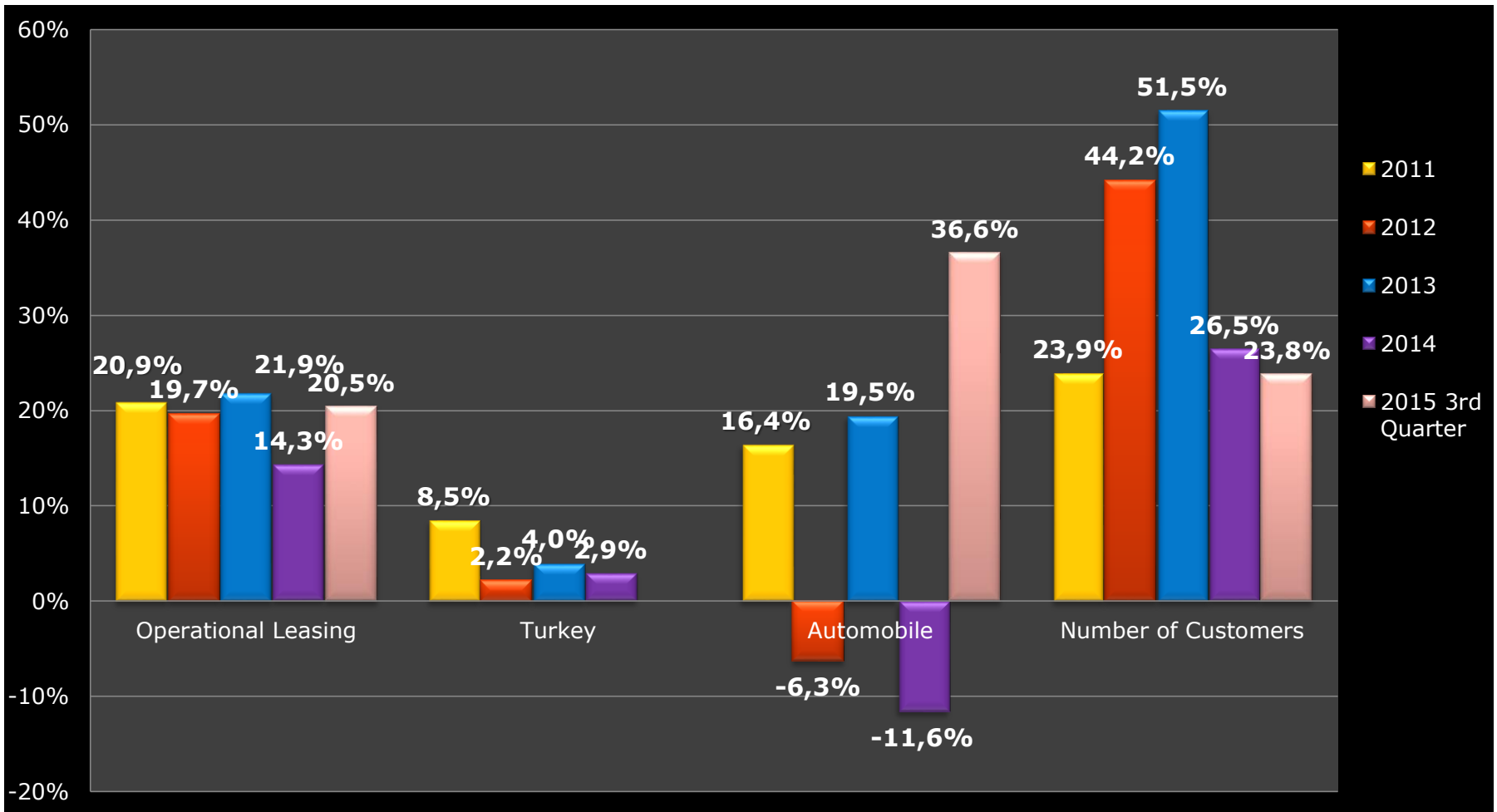
Total Number of Sector's Customers – Year Based



Total Number of Sector's Customers – Quarter Based



Comparison of The Customer Number Growth



*3rd Quarter of 2015 Turkey growth rate hasn't been announced yet,



TOKKDER Operational Leasing Sector Report

©TNS 2015



member of
Leaseurope

Sector – Number of Vehicles per Customer

