TOKKDER

Operational Leasing Sector Report

End of 2017 3rd Quarter

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Aim and Scope

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Market Information

TOKKDER was founded in Istanbul in 1996 to integrete 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 82% of sector,
- Member of Leaseurope,

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

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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,

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Methodology and Participating Companies

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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 2013	➔ %68,21
Year 2014	➔ %66,29
Year 2015	➔ %67,46
Year 2016	➔ %76,90
2017 3rd Quarter	➔ %78,29

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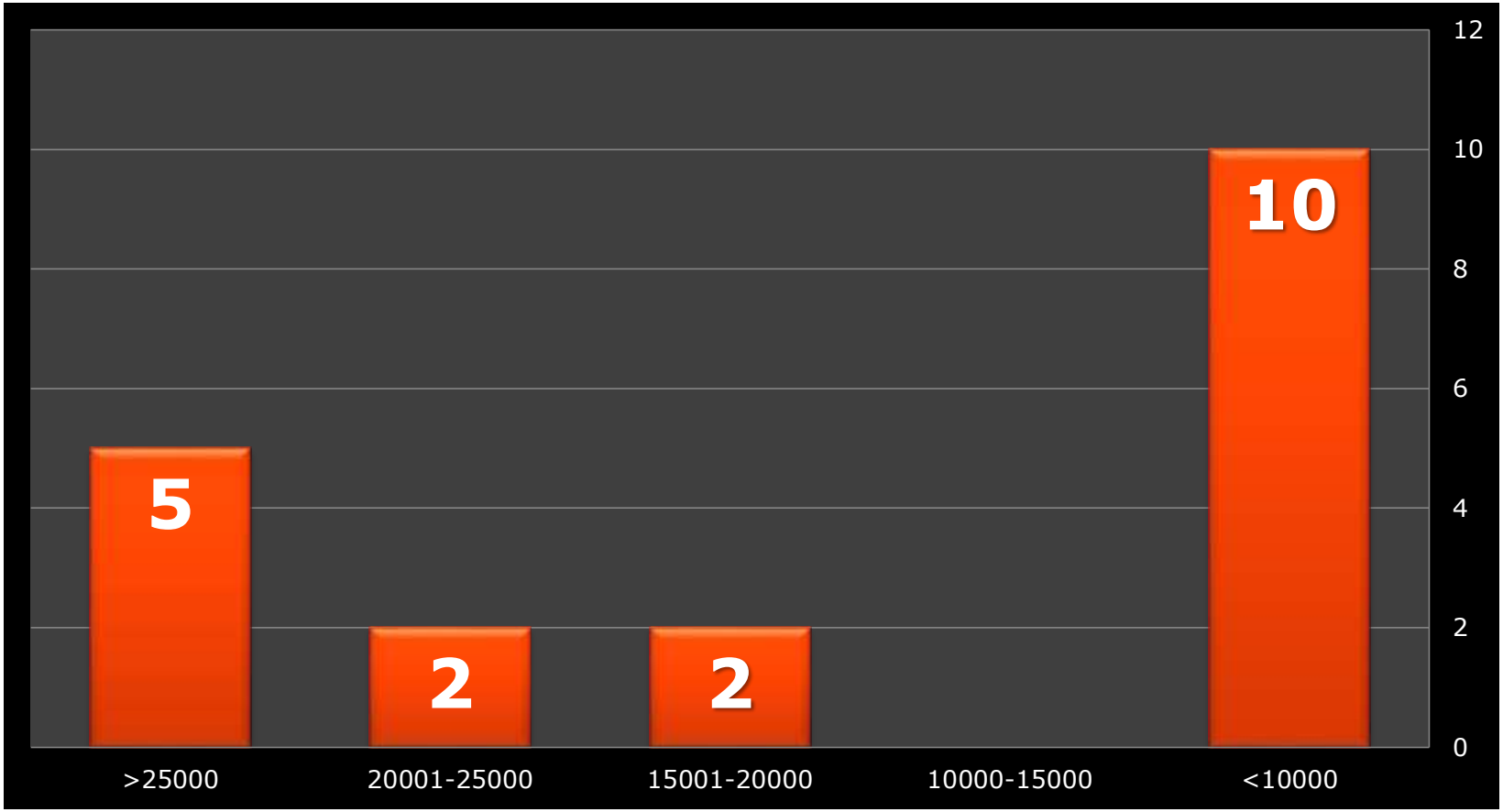
Participating Companies

- ALD AUTOMOTIVE
- ARKAS OTO FİLO YÖNETİMİ
- ATAKO DESTEK ARAÇ KİRALAMA
- AUTOLAND OTOMOTİV
- CENTRAL FLEET SERVICES
- TEB ARVAL
- BORUSAN OTOMOTİV PREMIUM KİRALAMA*
- OTOPLAN OPERASYONEL TAŞIT KİRALAMA*
- BORLEASE OTOMOTİV A.Ş.
- DRD FİLO KİRALAMA
- FLEETCORP
- GARANTİ FİLO
- HEDEF FİLO
- LEASEPLAN
- OTOKOÇ OTOMOTİV
- TAN OTO MOTORLU ARAÇLAR
- ÇELİK MOTOR TİCARET AŞ
- LİDER FİLO
- DENİZFİLO

**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*
**Çelik Motor Ticaret AŞ, has been participating the research since Q1 2016.*
**Lider Filo, has been participating the research since Q2 2016.*
**Borlease, has been participating the research since Q4 2016.*
**DenizFilo, has been participating the research since Q1 2017.*

Participating Companies

Distribution according to the size of companies / 2017 3rd Quarter



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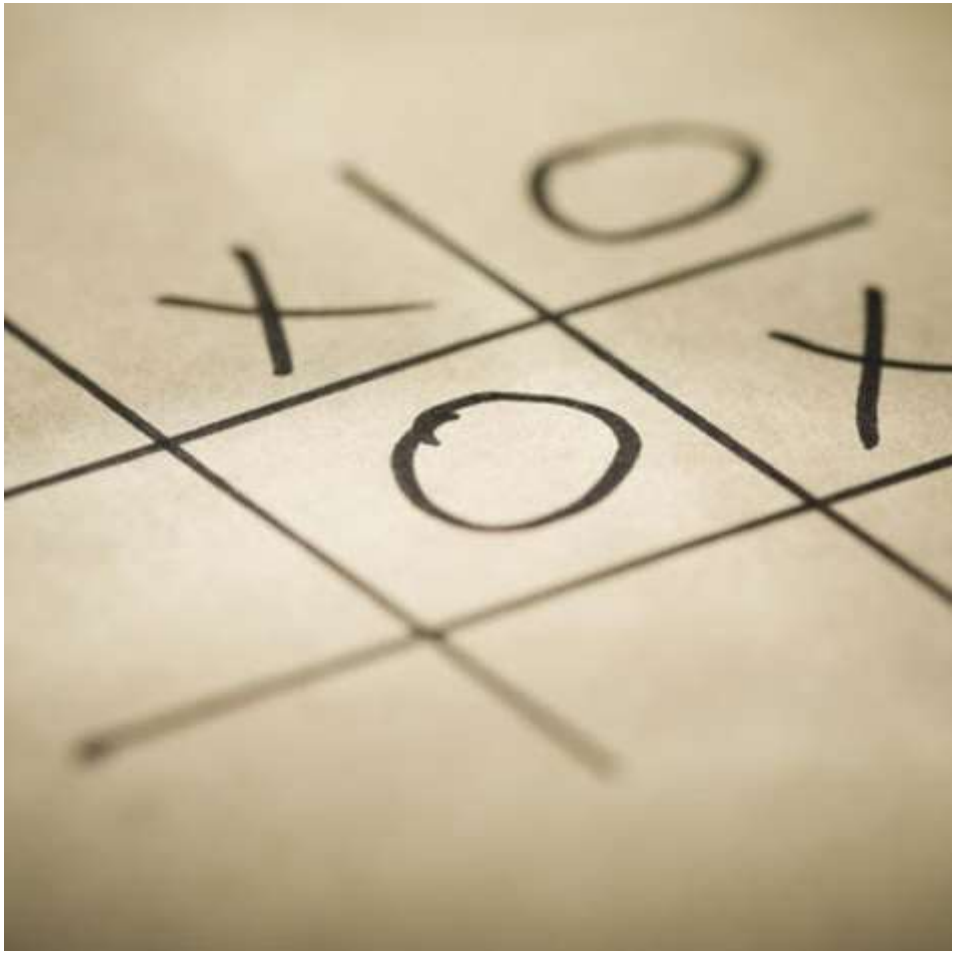
Summary



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Participants and Sector Estimates

Summary/ 2017 3rd Quarter

	Participants	Sector Estimates
Number of Vehicles	270.811	346.618
Number of Purchased Vehicles	74.789	95.527
Number of Sold Vehicles (2nd Hand)	62.274	79.530
Number of Customers	49.102	62.847
Amount of Purchased Vehicles (TL)	6.589.741.384	8.418.431.395
Amount of The Paid Taxes (TL) VAT+ MVT+ SCT	3.523.134.781	4.501.523.264
Sum of Actives (TL)	20.339.671.142	26.033.270.923

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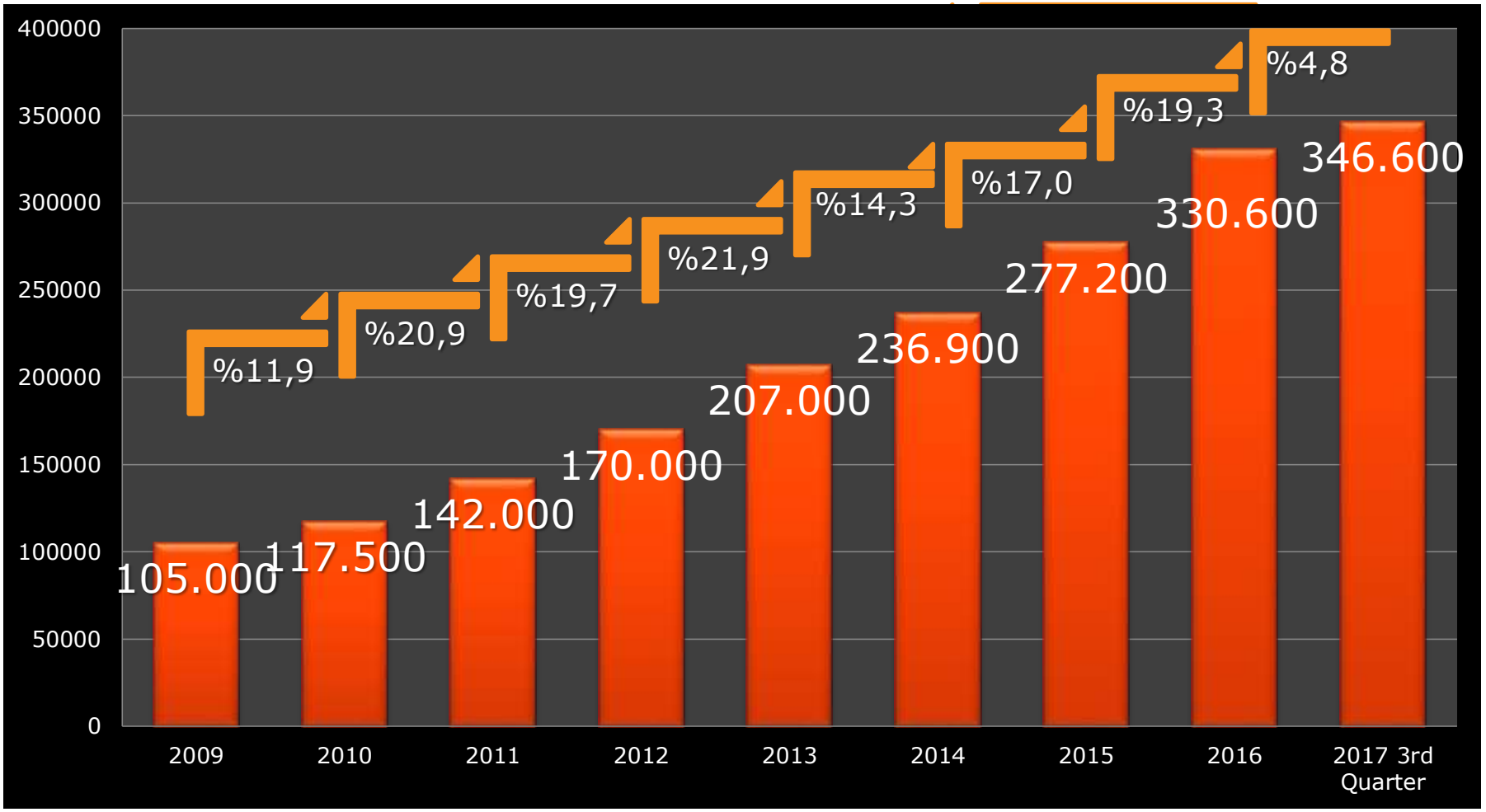
Estimated Growth of Vehicle Park of the Sector – Year Based



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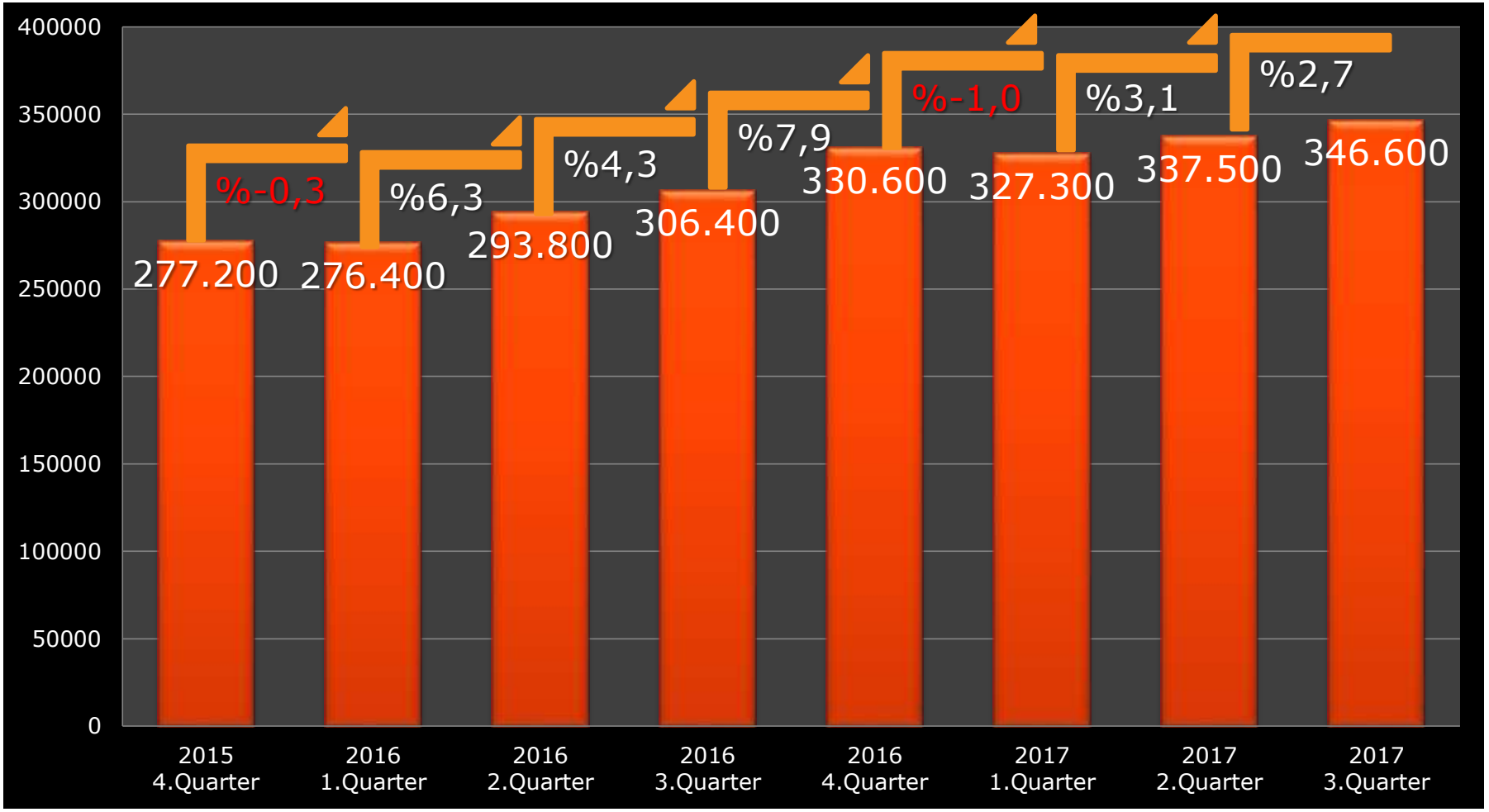
Estimated Growth of Vehicle Park of the Sector – Quarter Based



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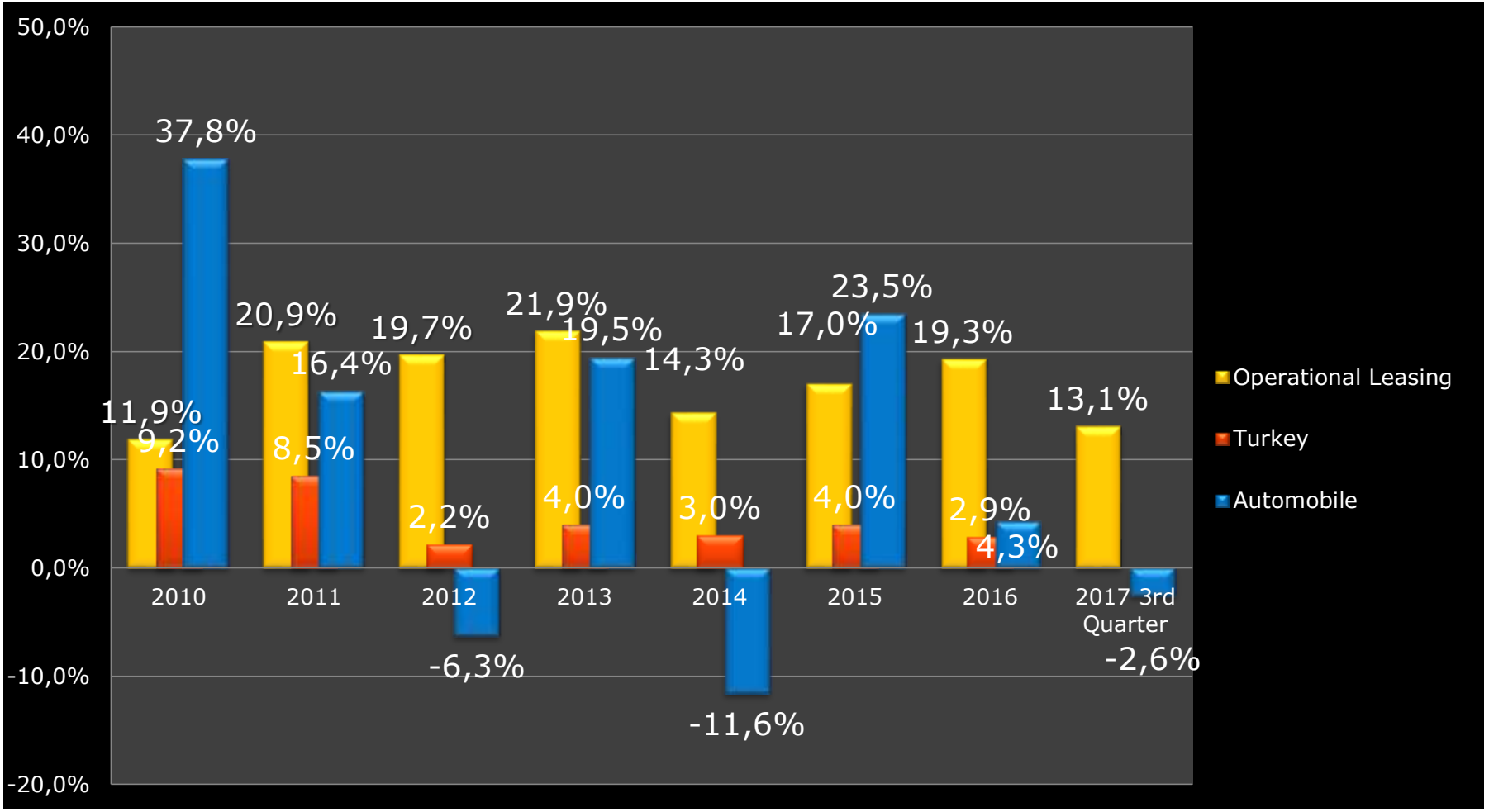
Growth Rates / Benchmarks

Turkey Economy / Automotive Sector / Operational Leasing Sector



**3rd Quarter of 2017 Turkey growth rate hasn't been announced yet,*

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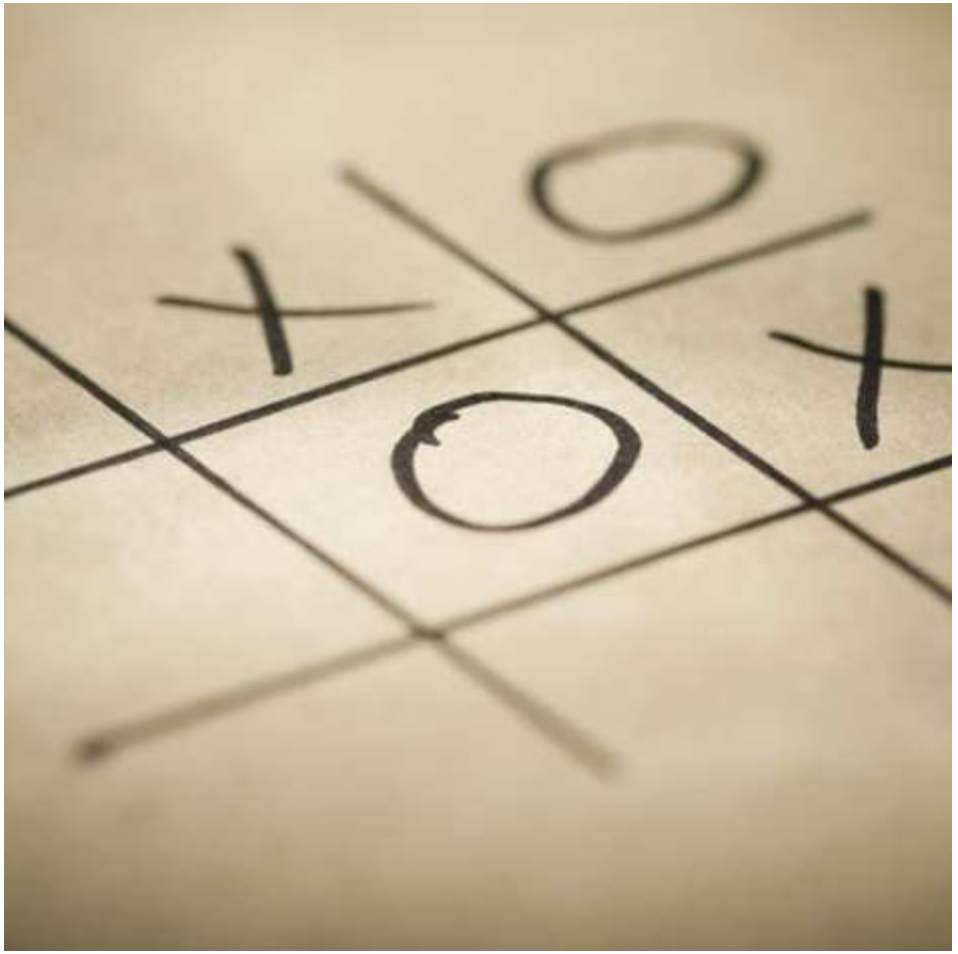
Vehicle Park and Its Features



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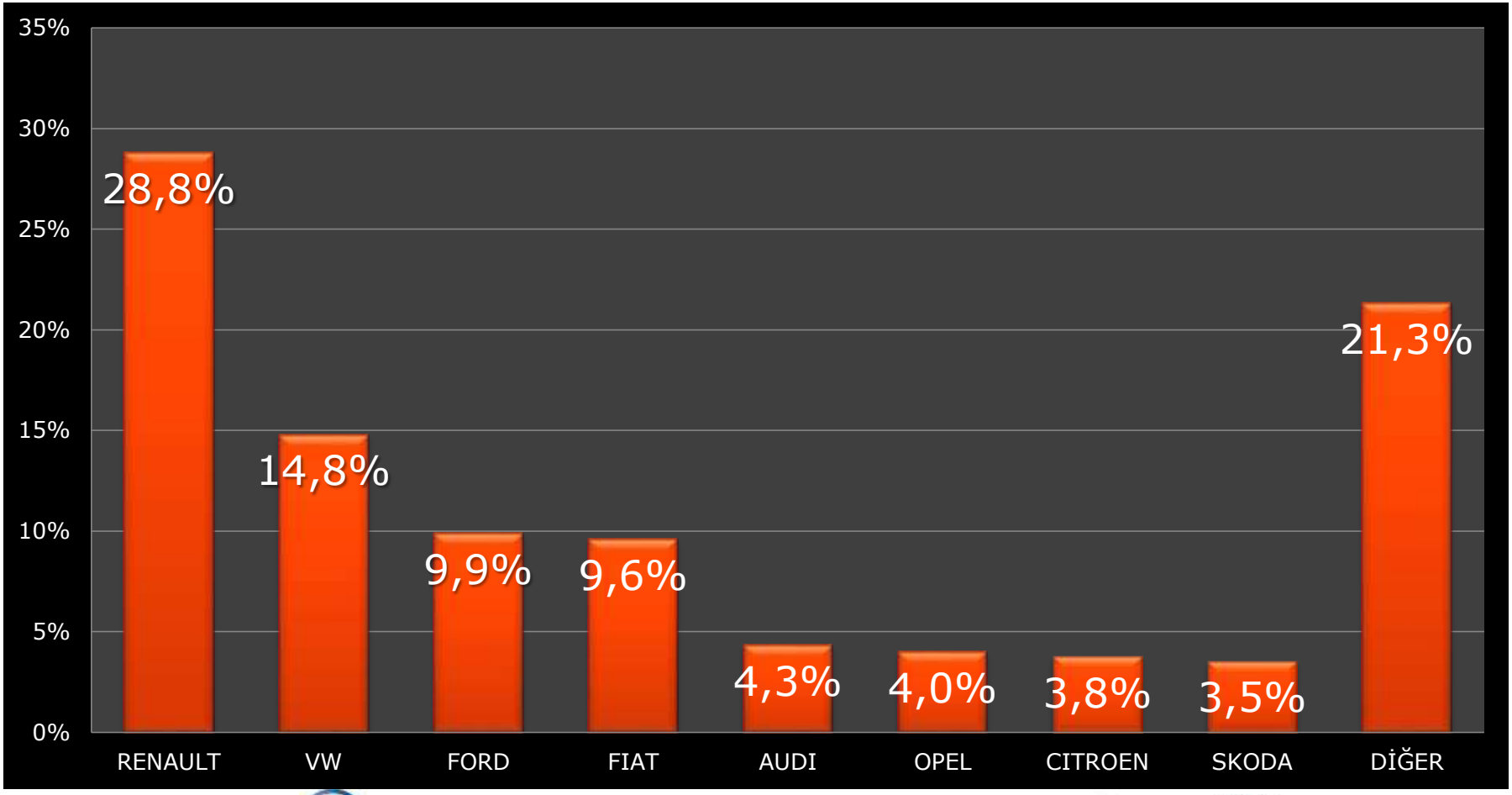
Vehicle Park of Sector / Make Based Distribution

2017 3rd Quarter



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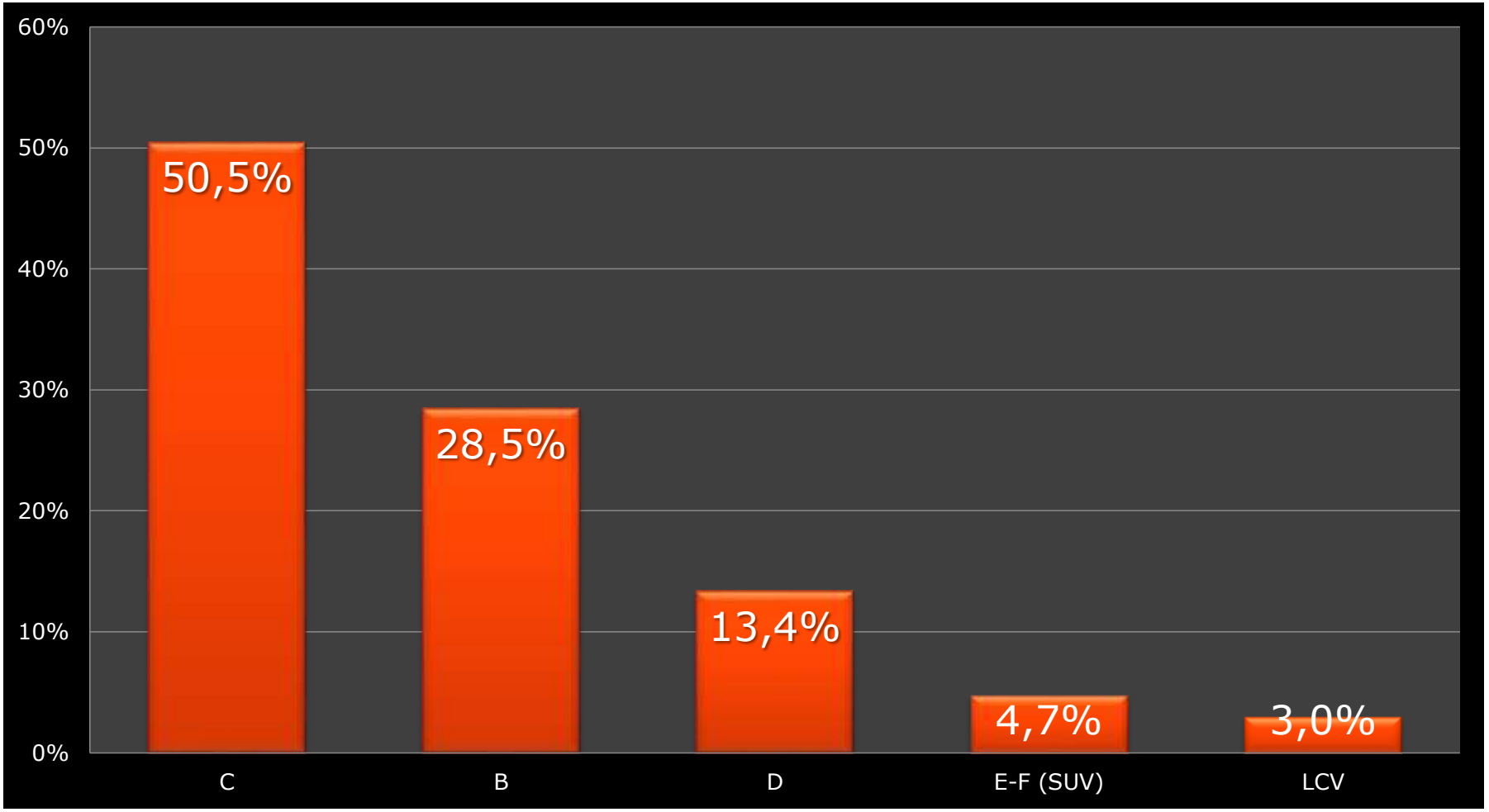
Vehicle Features of Sector / Vehicle Segments

2017 3rd Quarter



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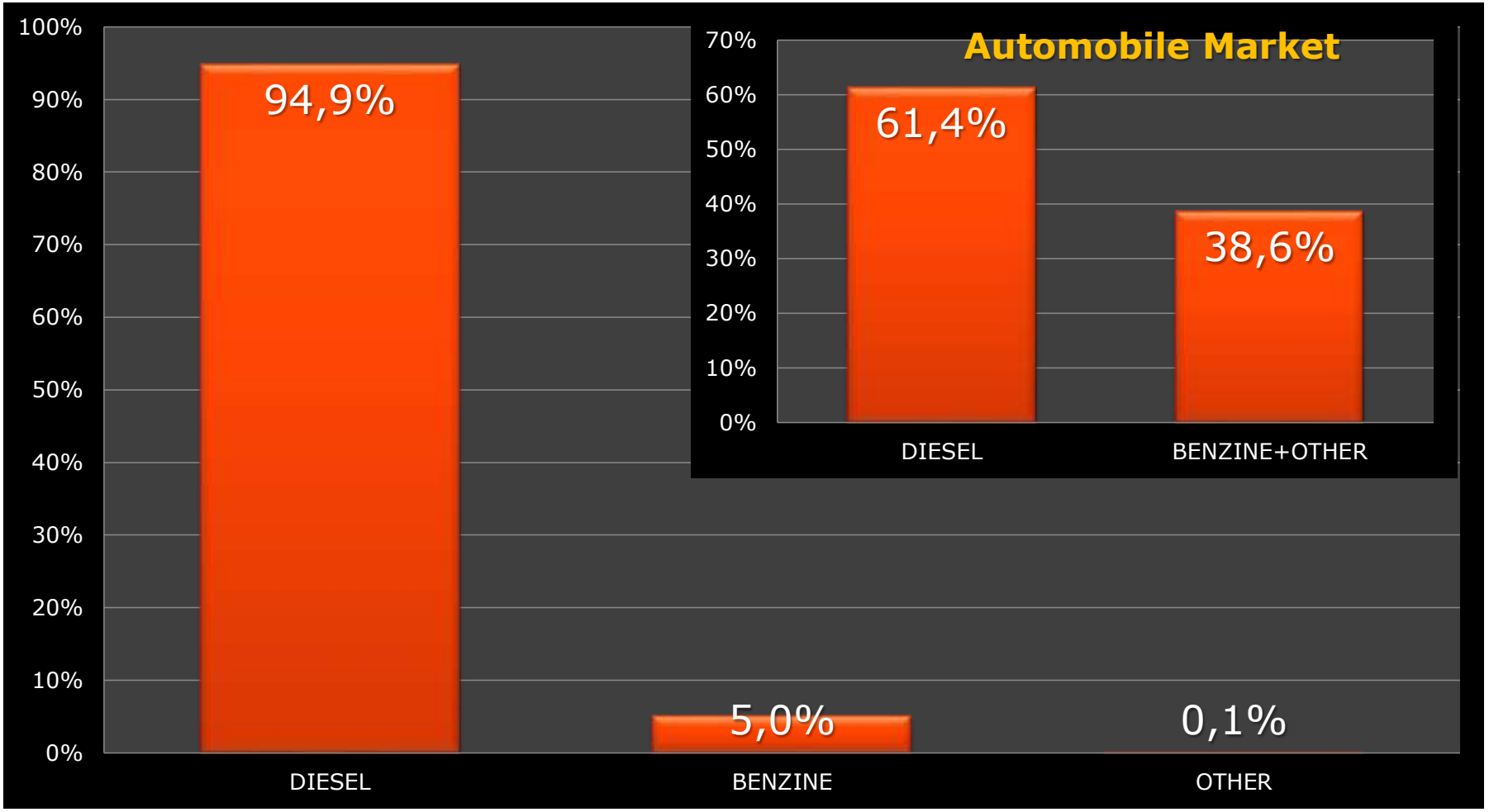
Vehicle Features of Sector / Fuel Type

2017 3rd Quarter



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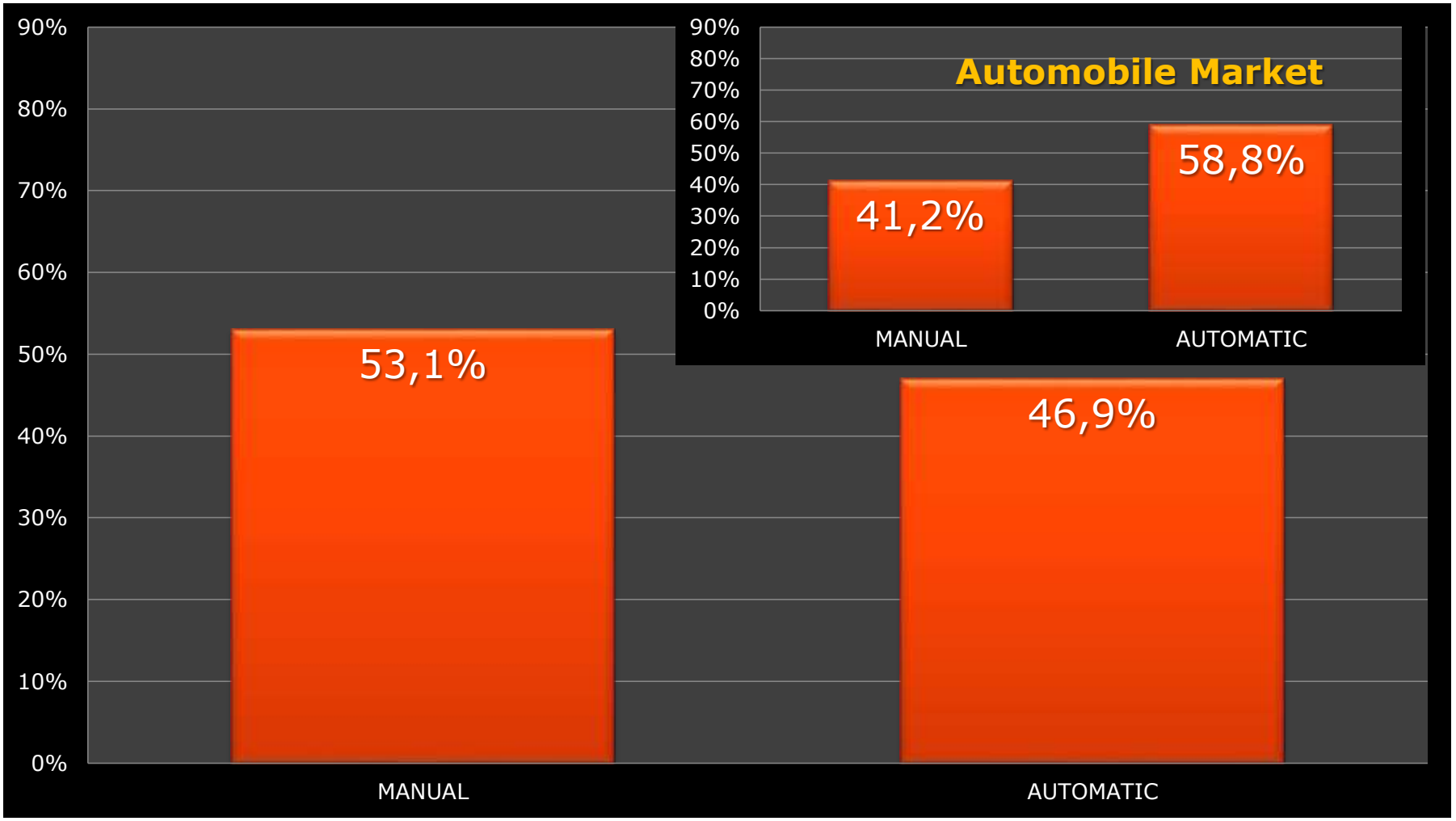
Vehicle Features of Sector / Transmission Type

2017 3rd Quarter



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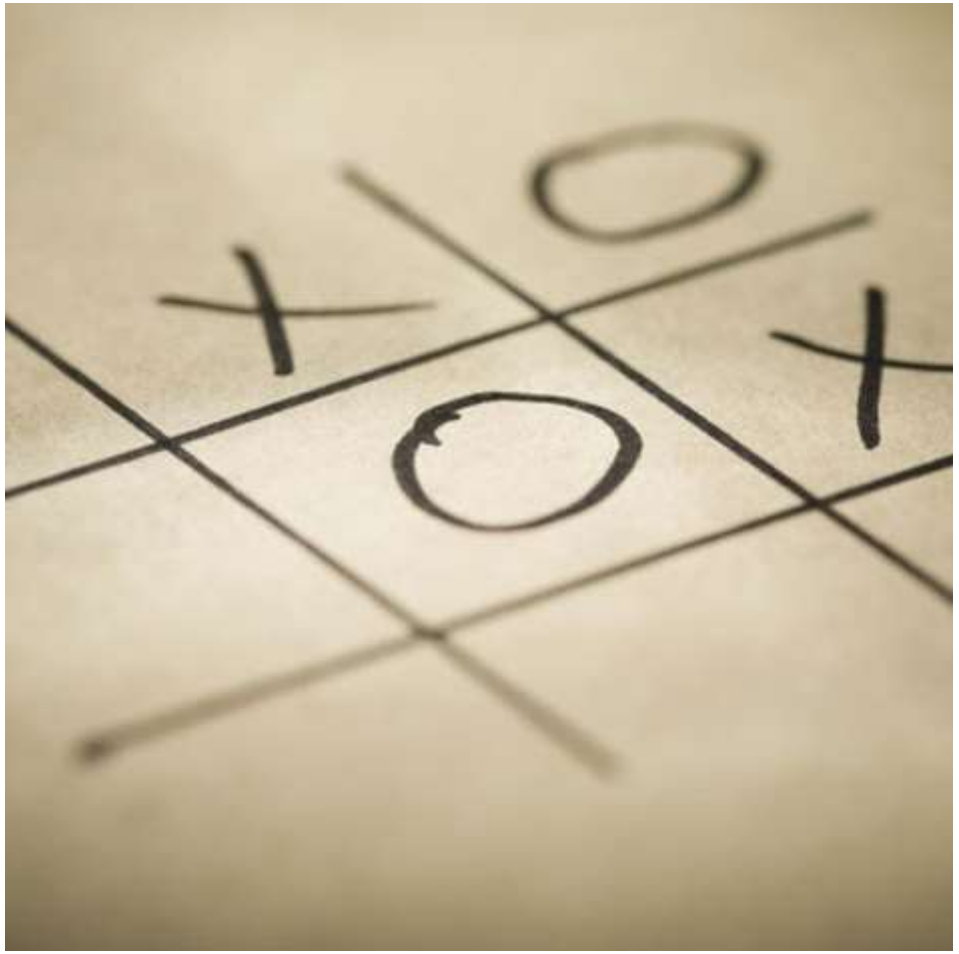
Contract Structure



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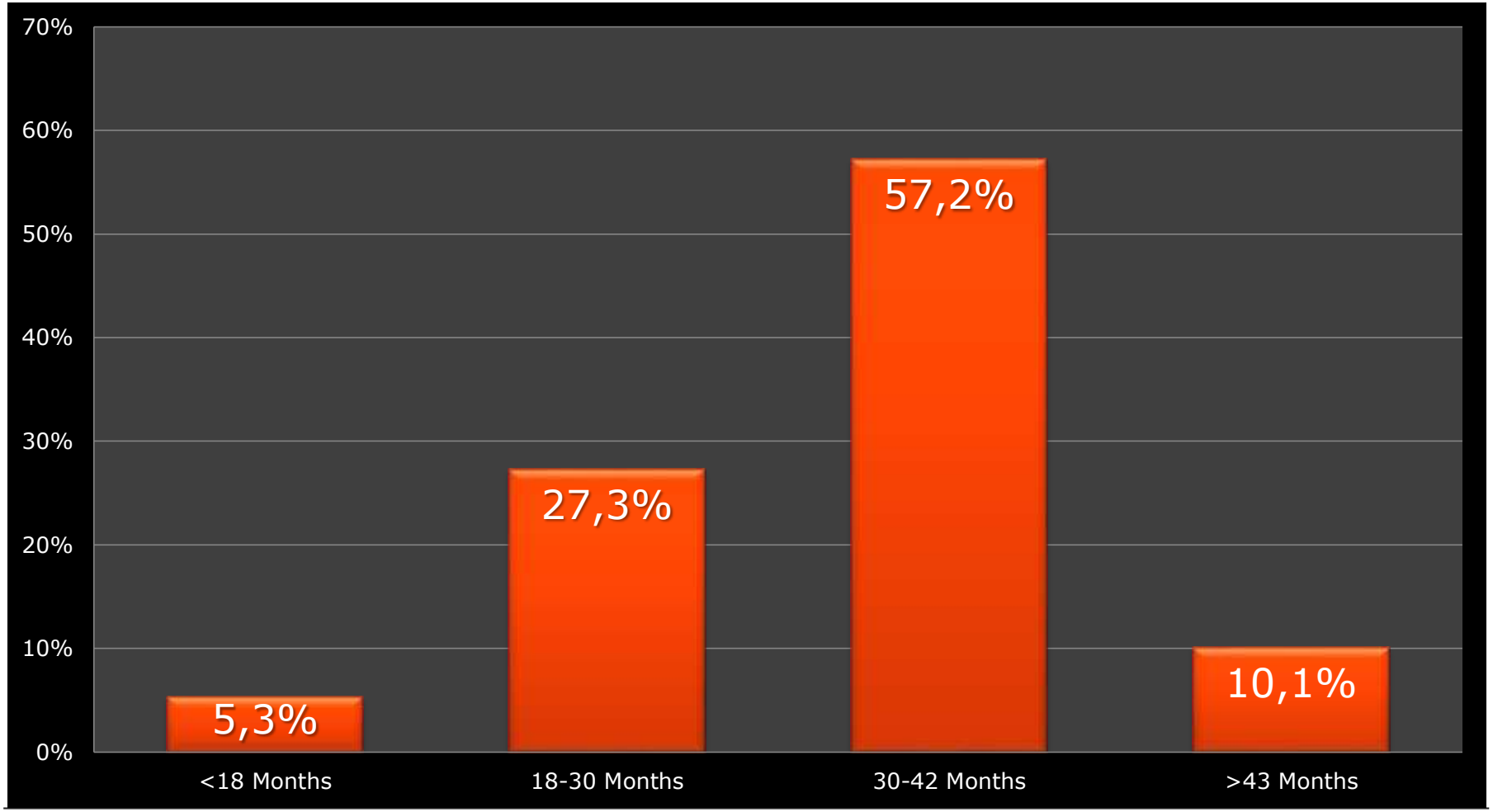
Contract Features of Sector / Term Based

2017 3rd Quarter



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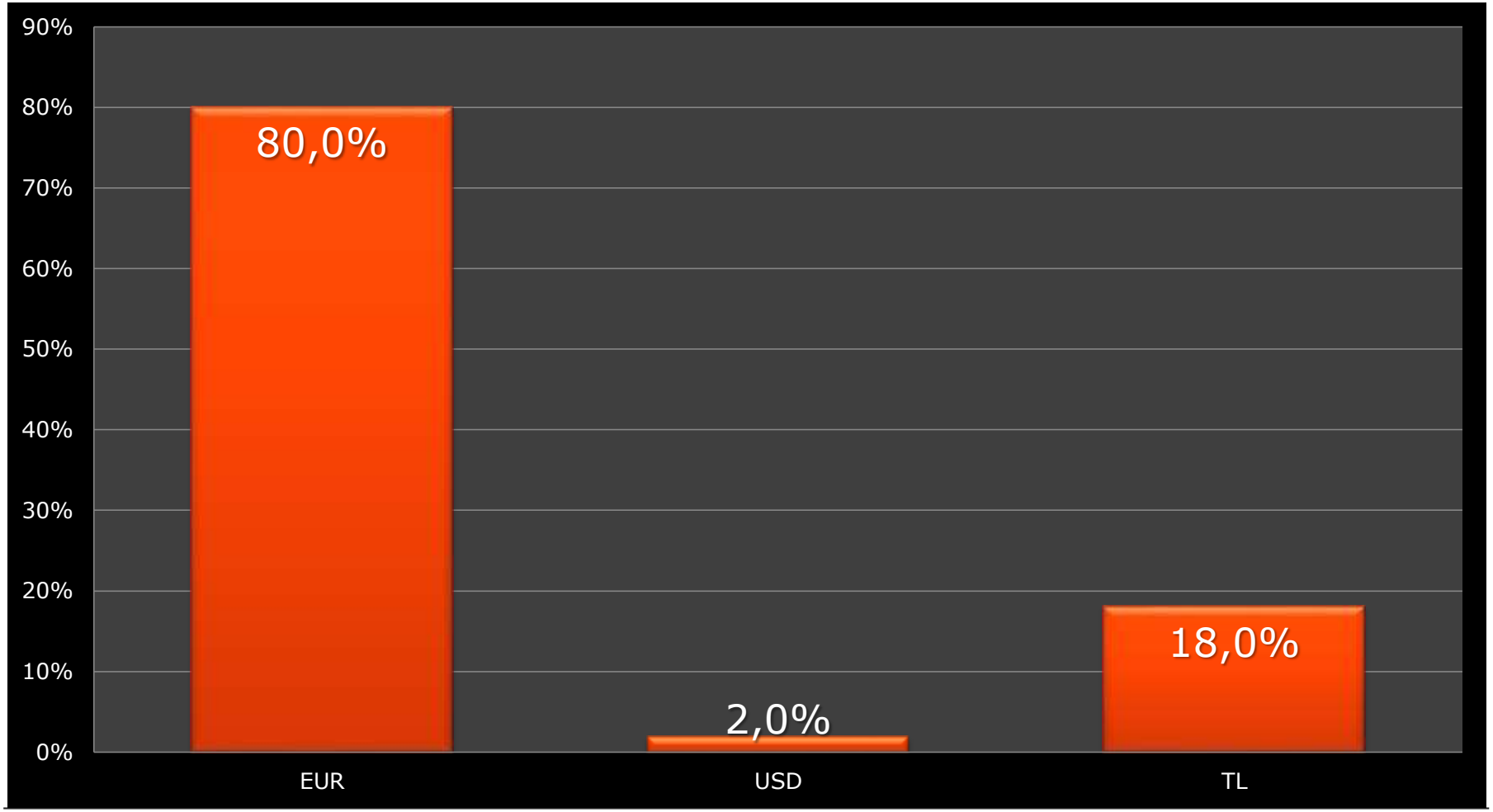
Contract Features of Sector / Currency Based

2017 3rd Quarter



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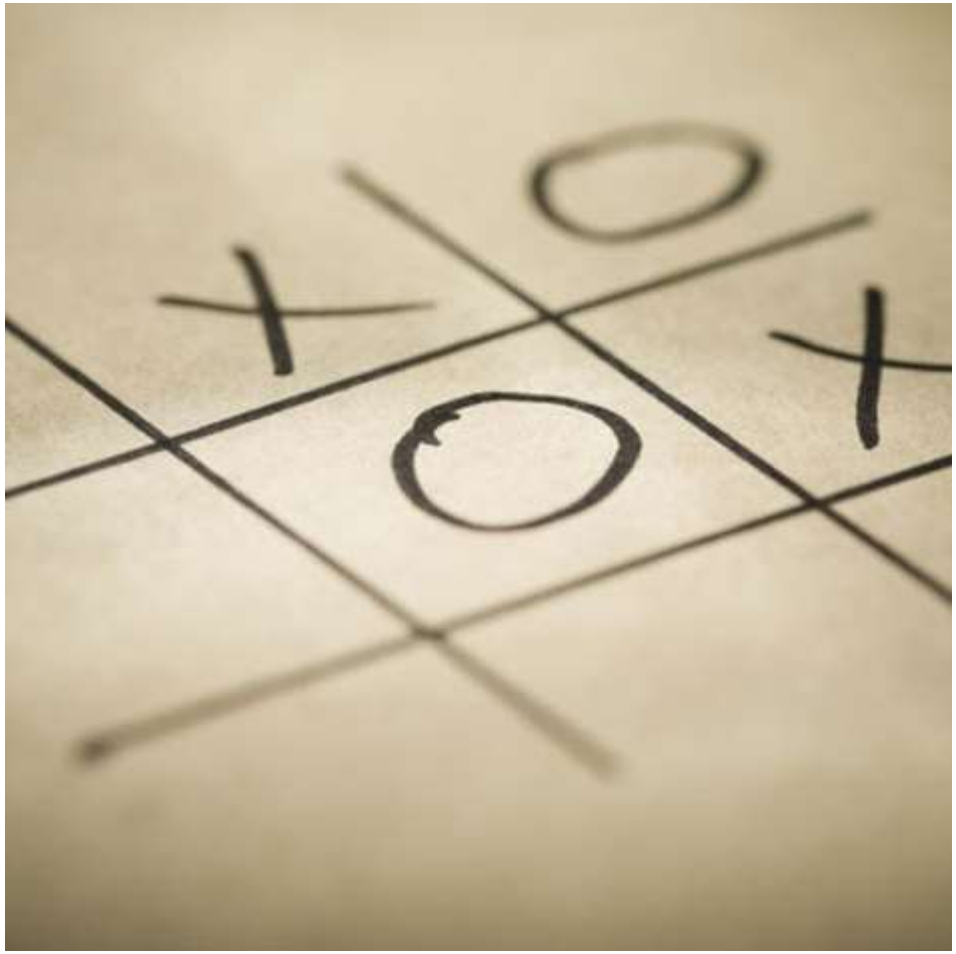
Vehicle Investments, Vehicle Purchases, Vehicle Sales and Paid Taxes



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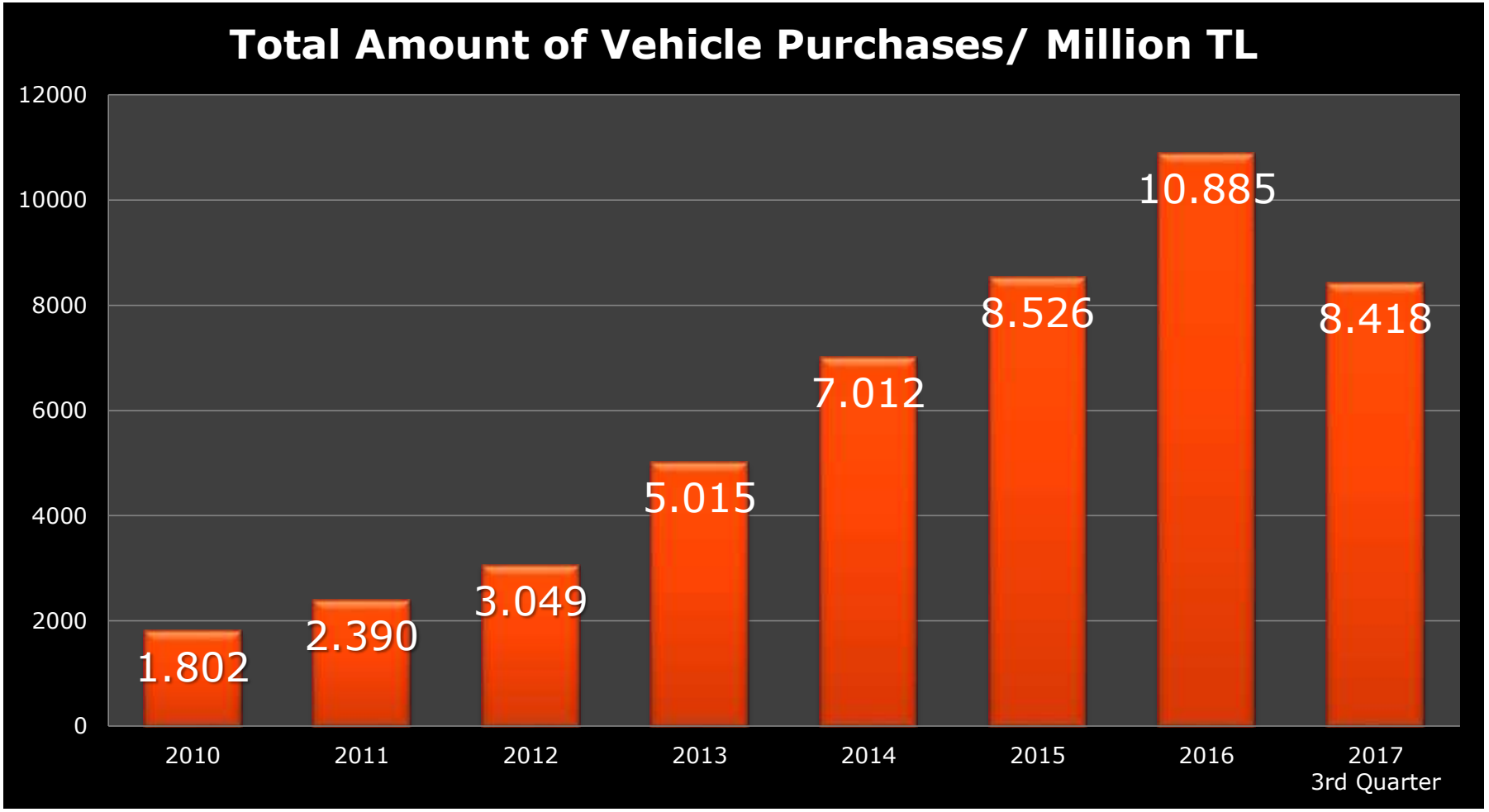
Sector Growth – Year Based



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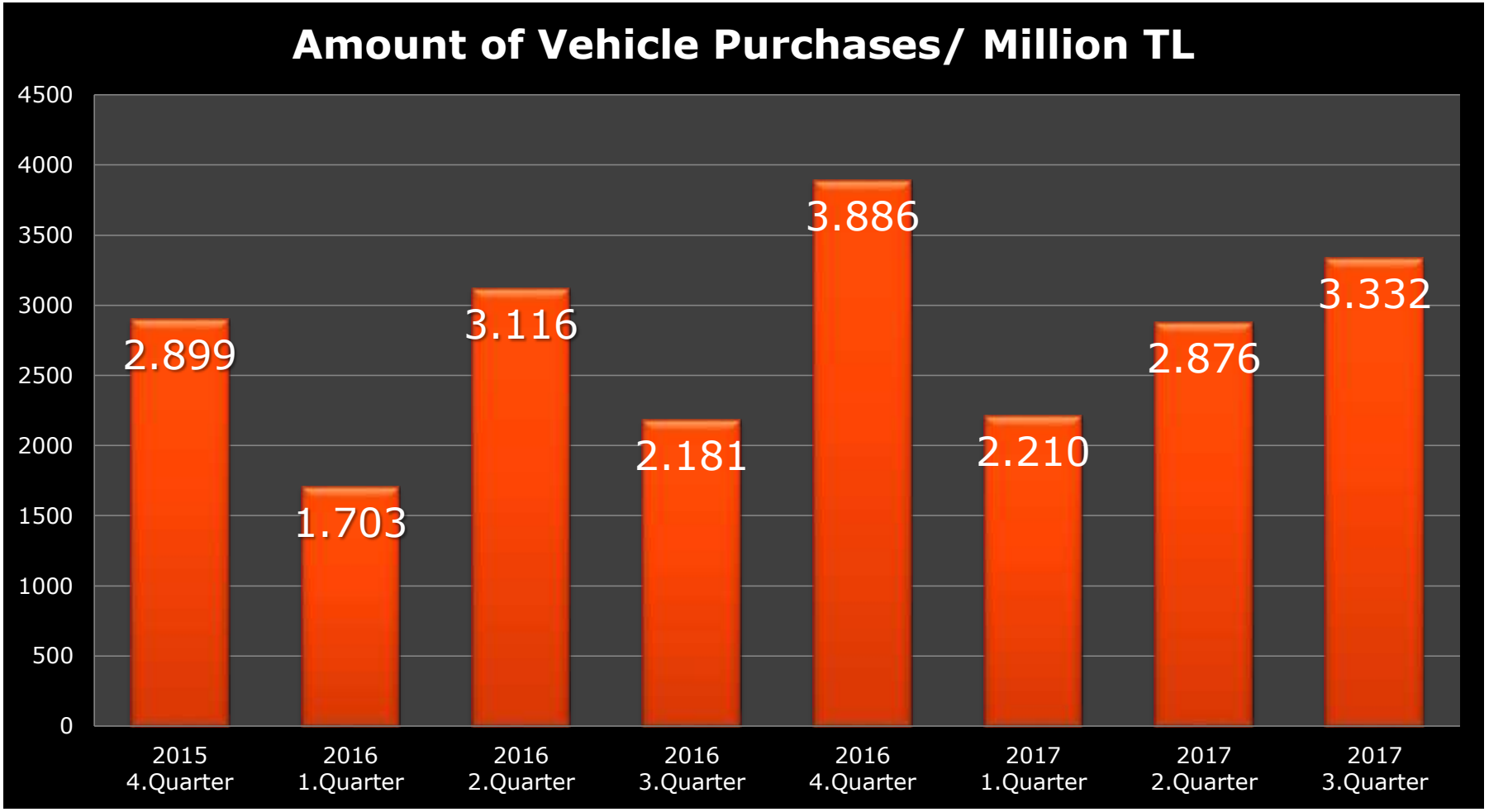
Sector Growth – Quarter Based



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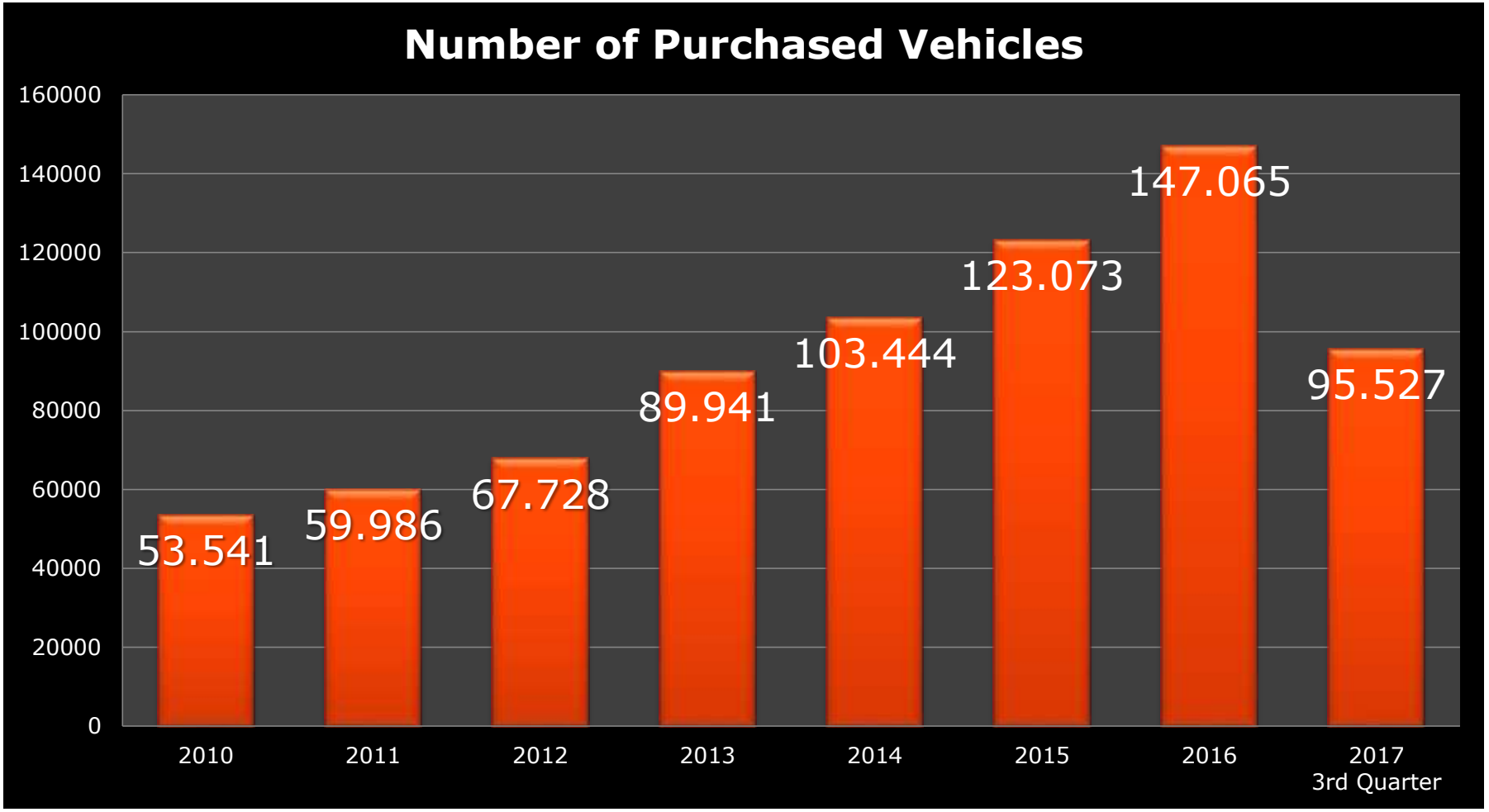
Sector Growth – Year Based



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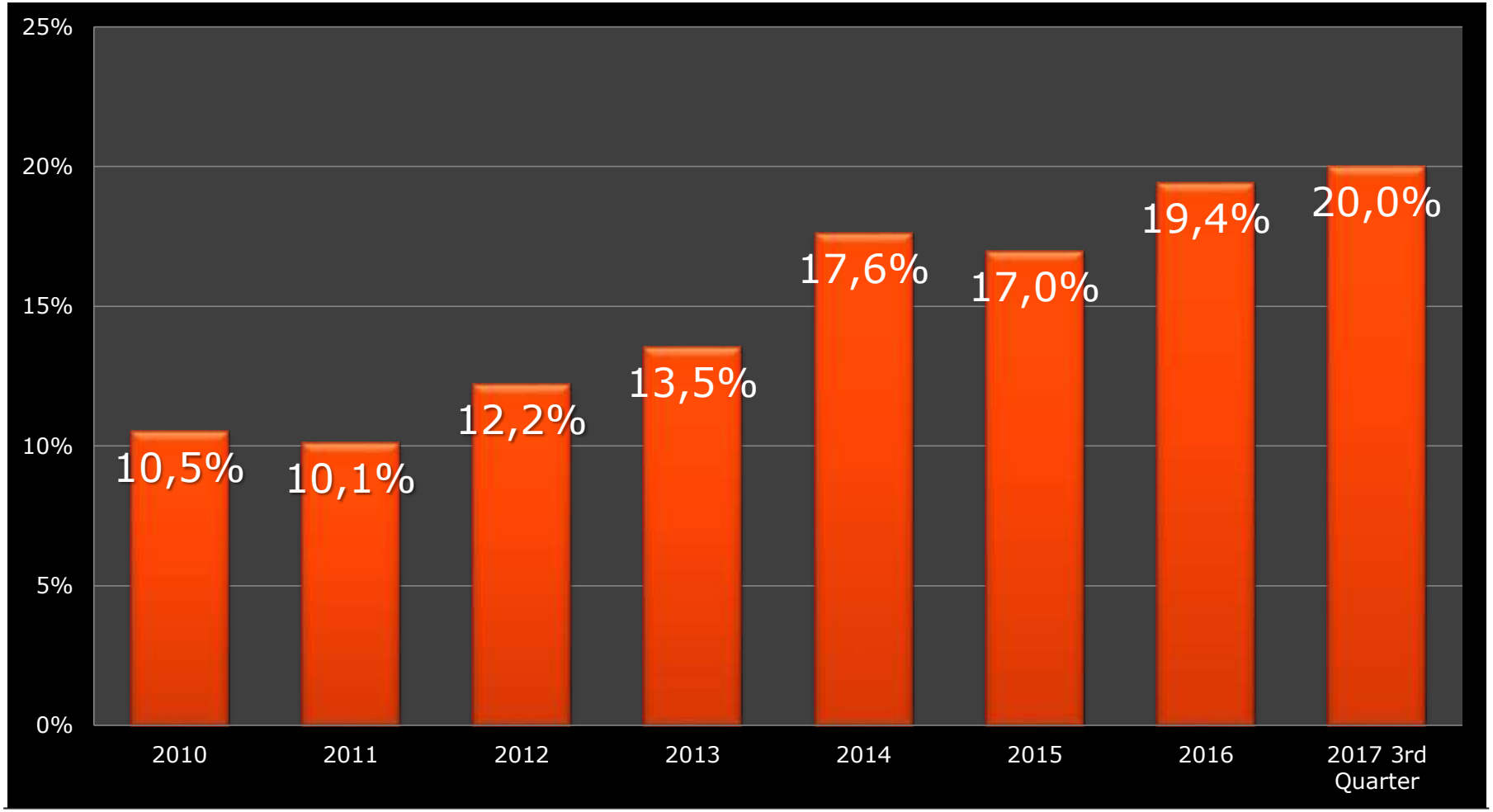
Operational Leasing / Share in Automobile Purchases



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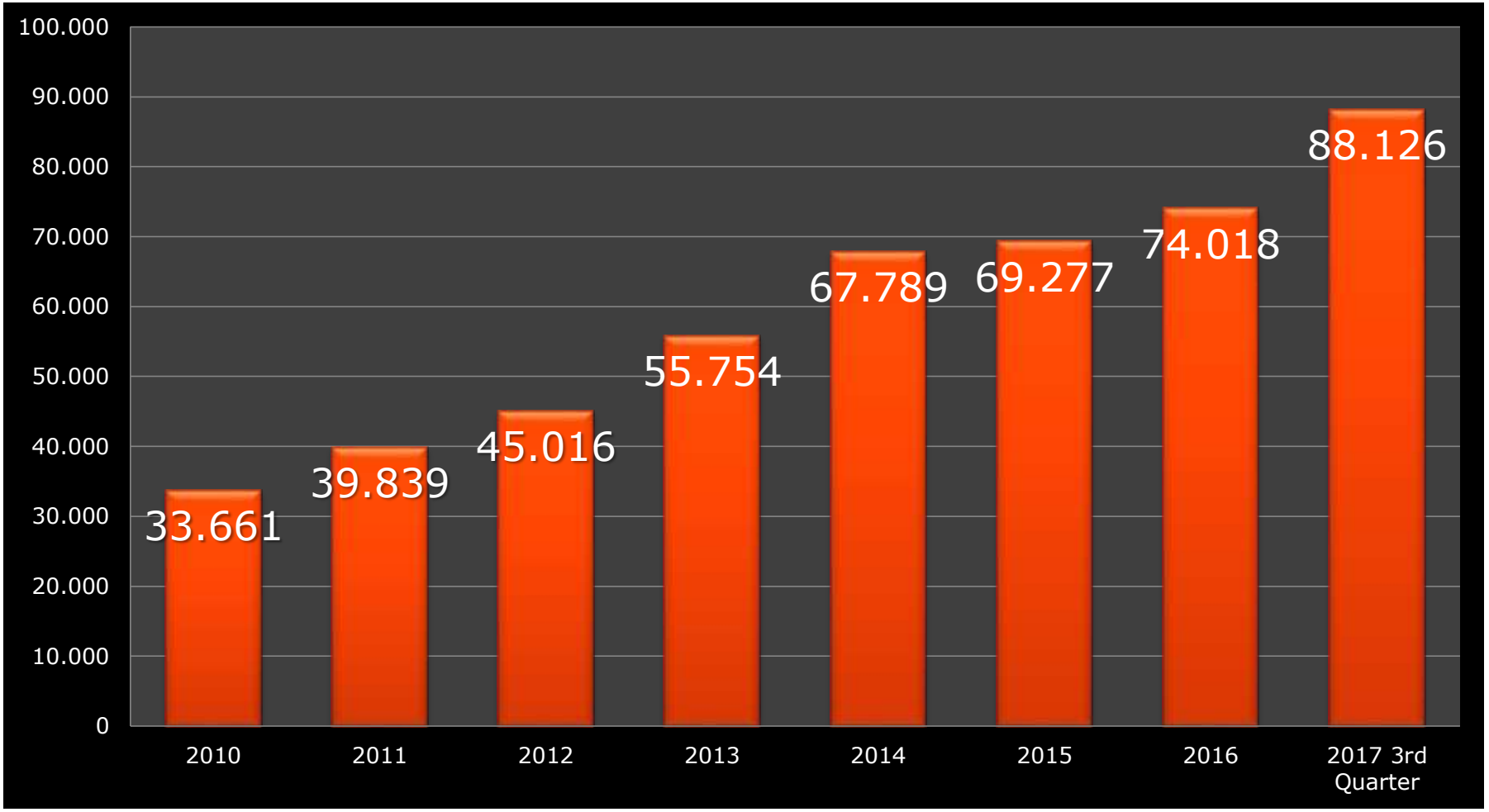
Average Per Unit Vehicle Purchase Amount of The Sector / TL



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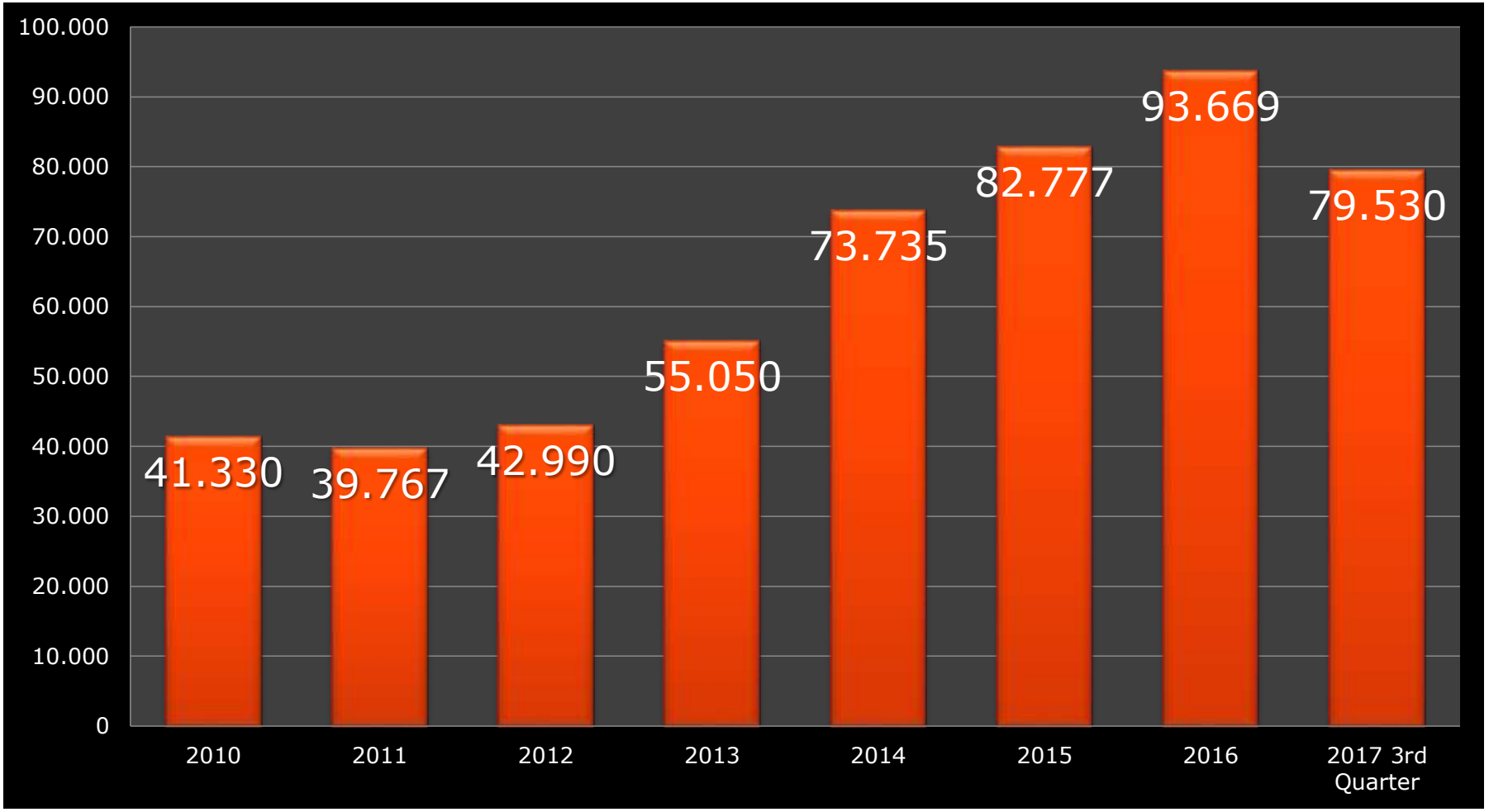
Estimated Total Vehicle Sales Volume of The Sector– Year Based



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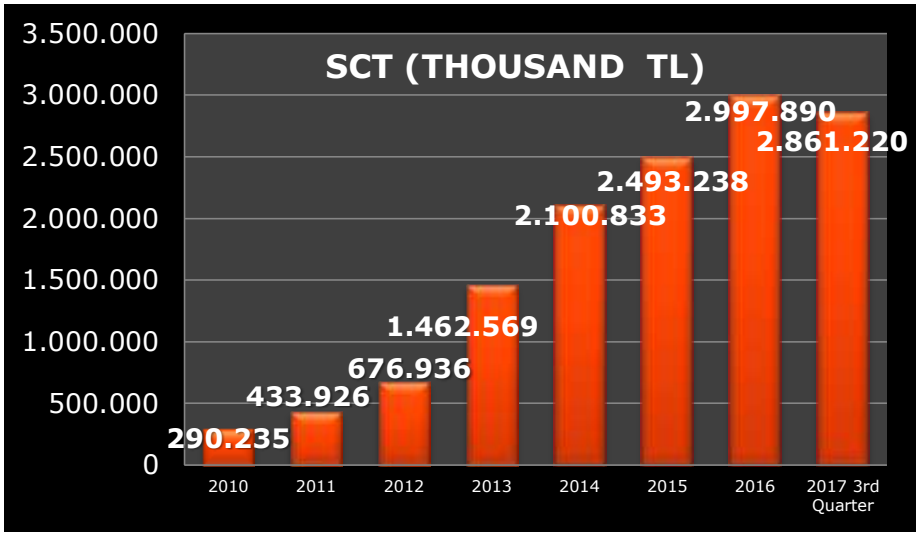
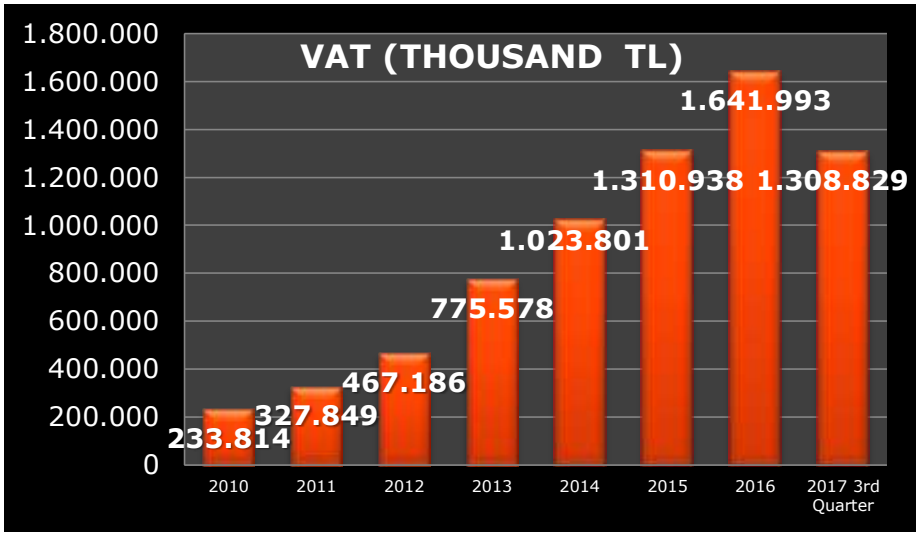
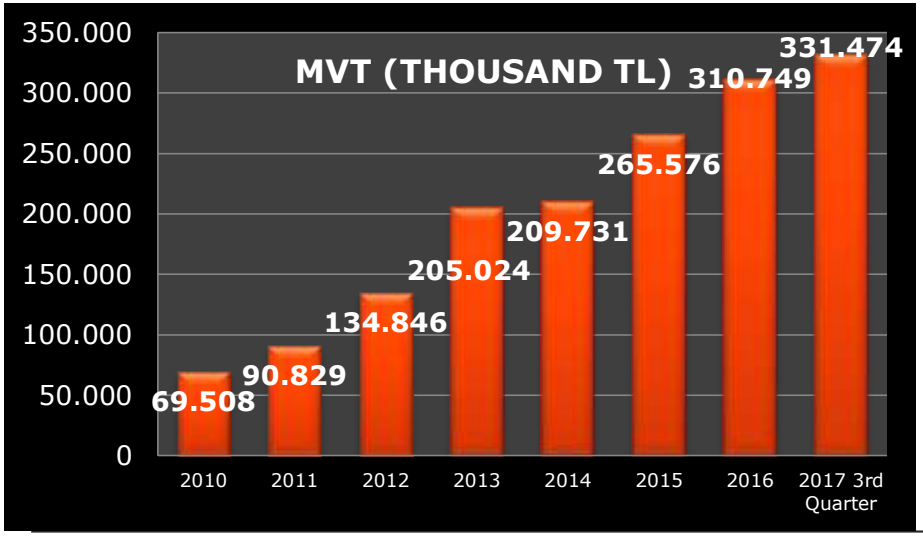
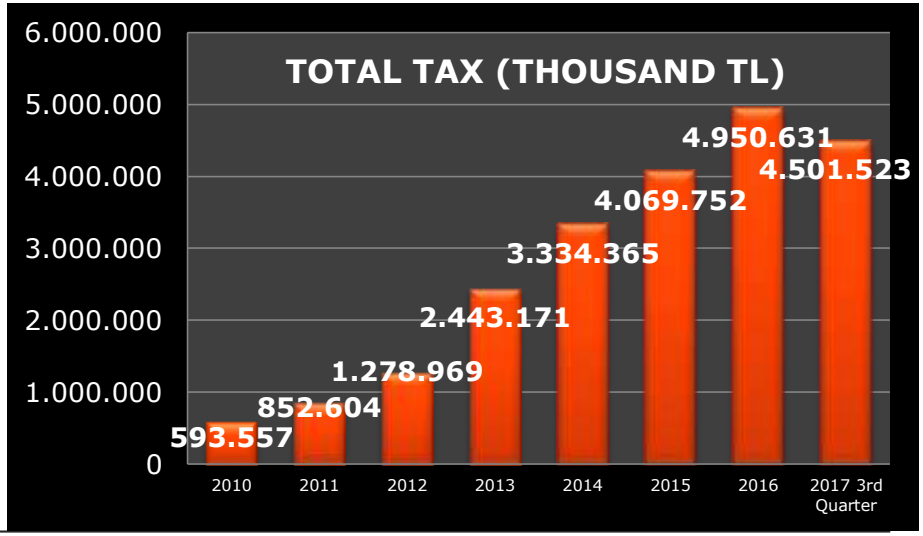
Sector Tax Trend









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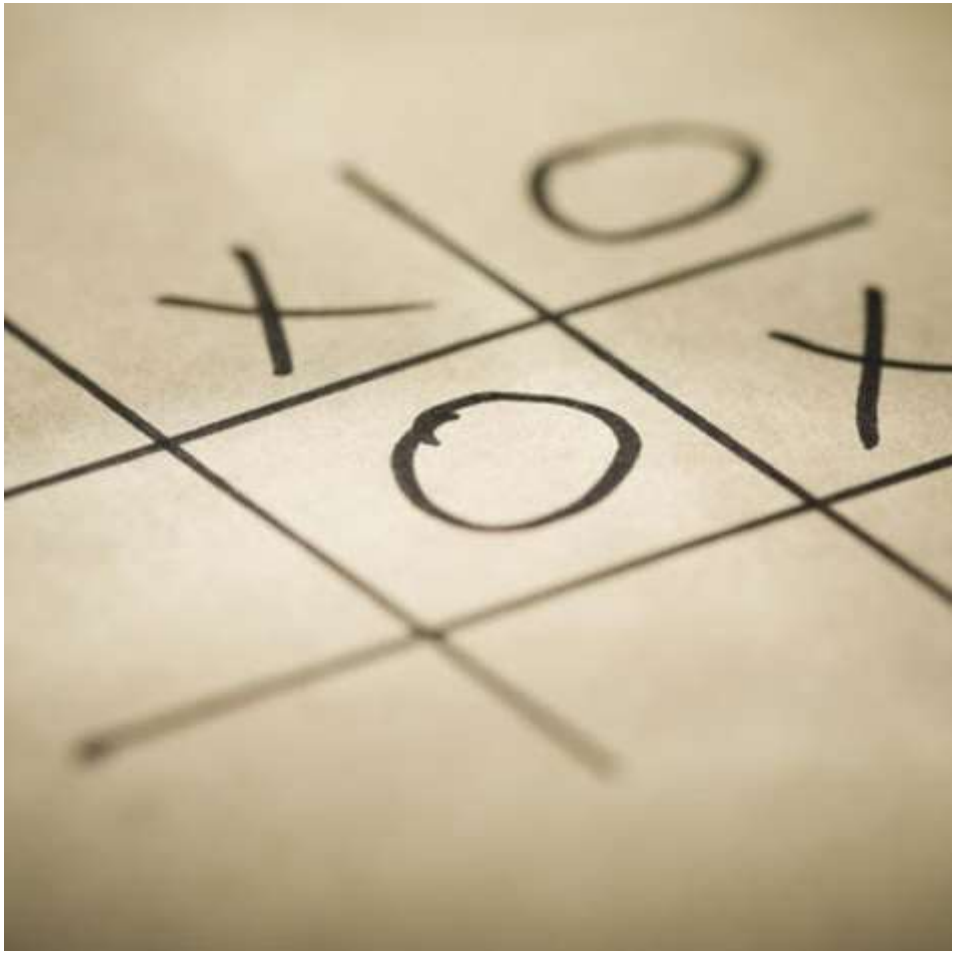
Number of Customers



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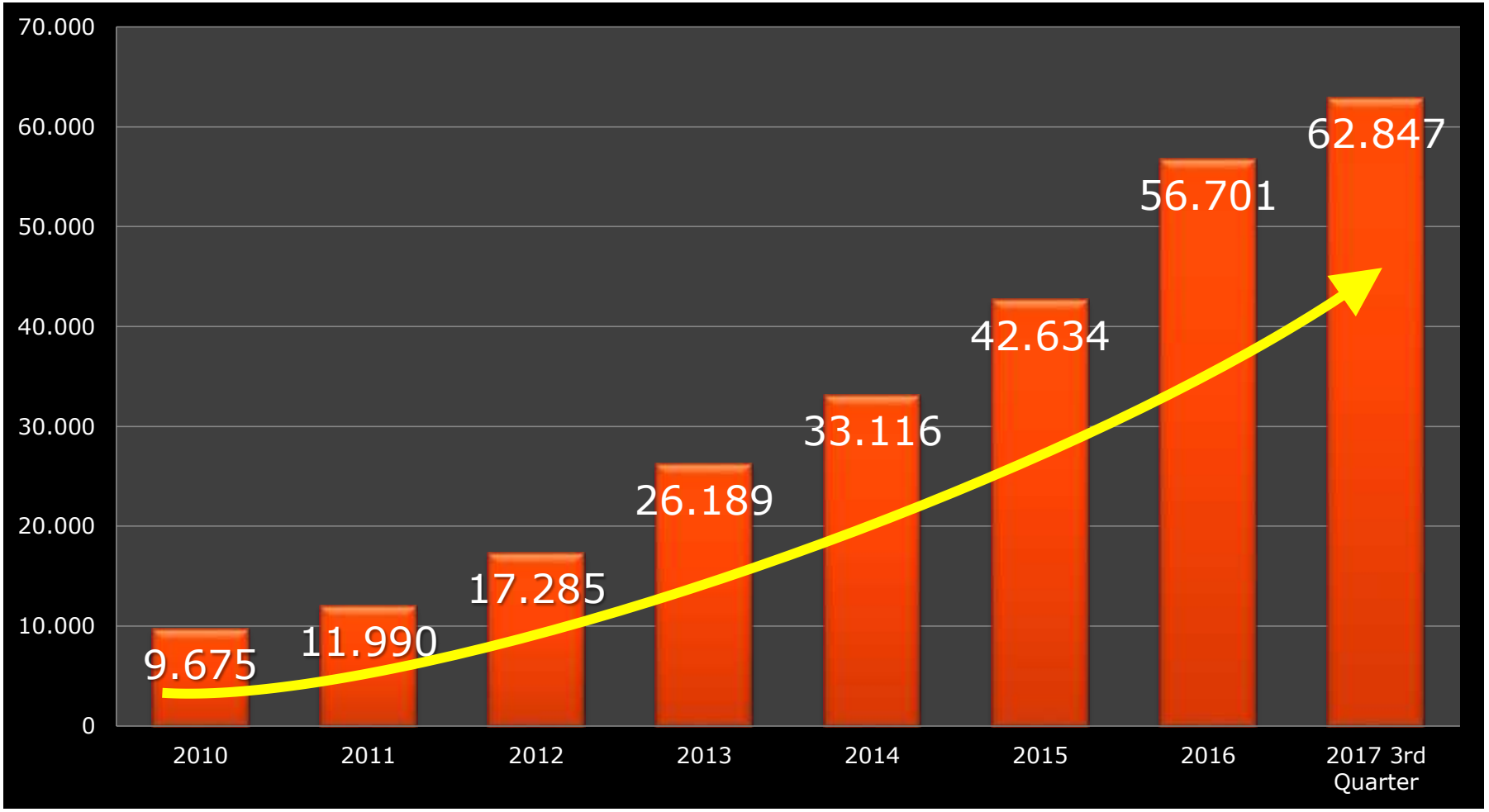
Total Number of Sector's Customers – Year Based



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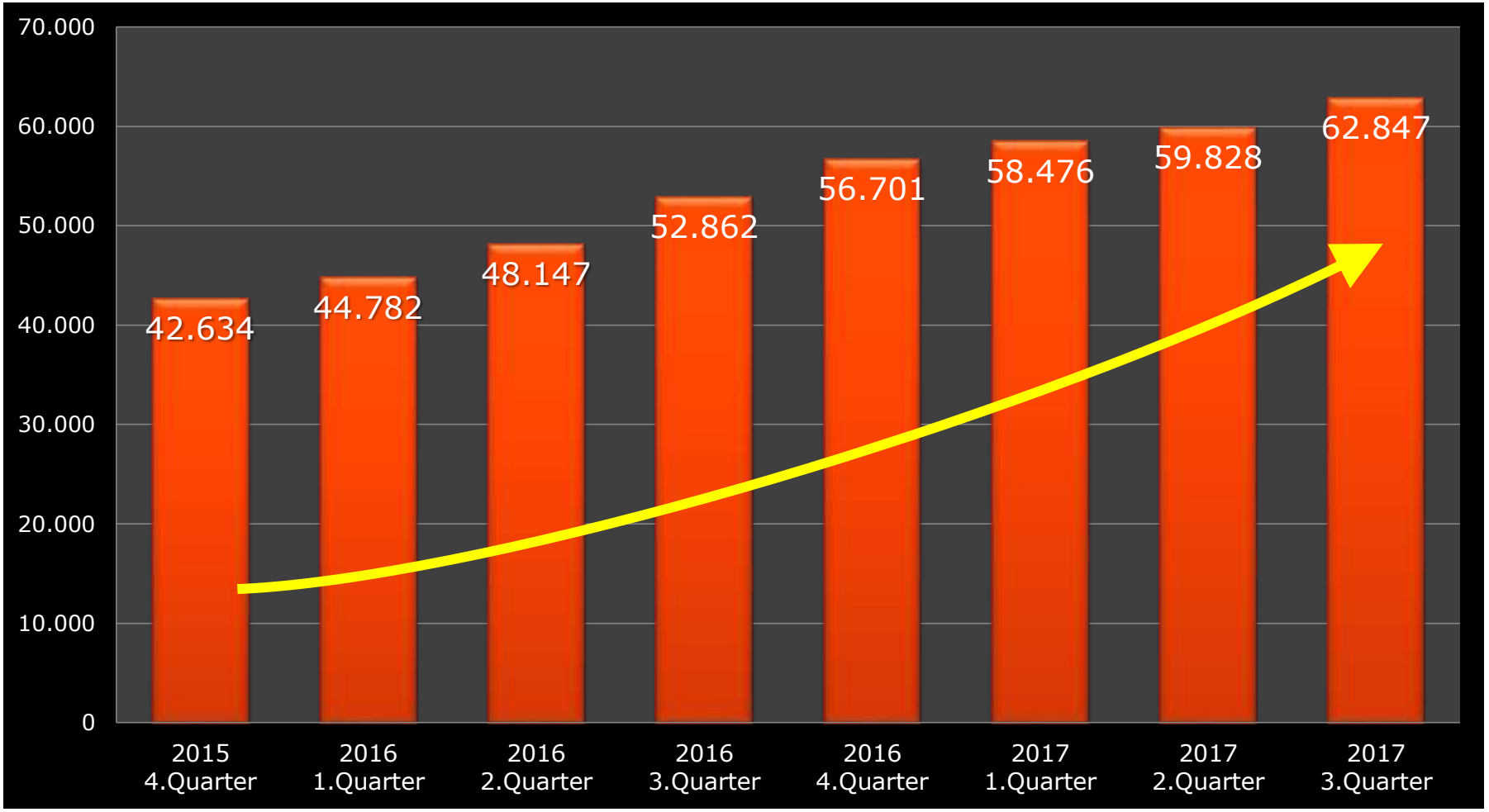
Total Number of Sector's Customers – Quarter Based



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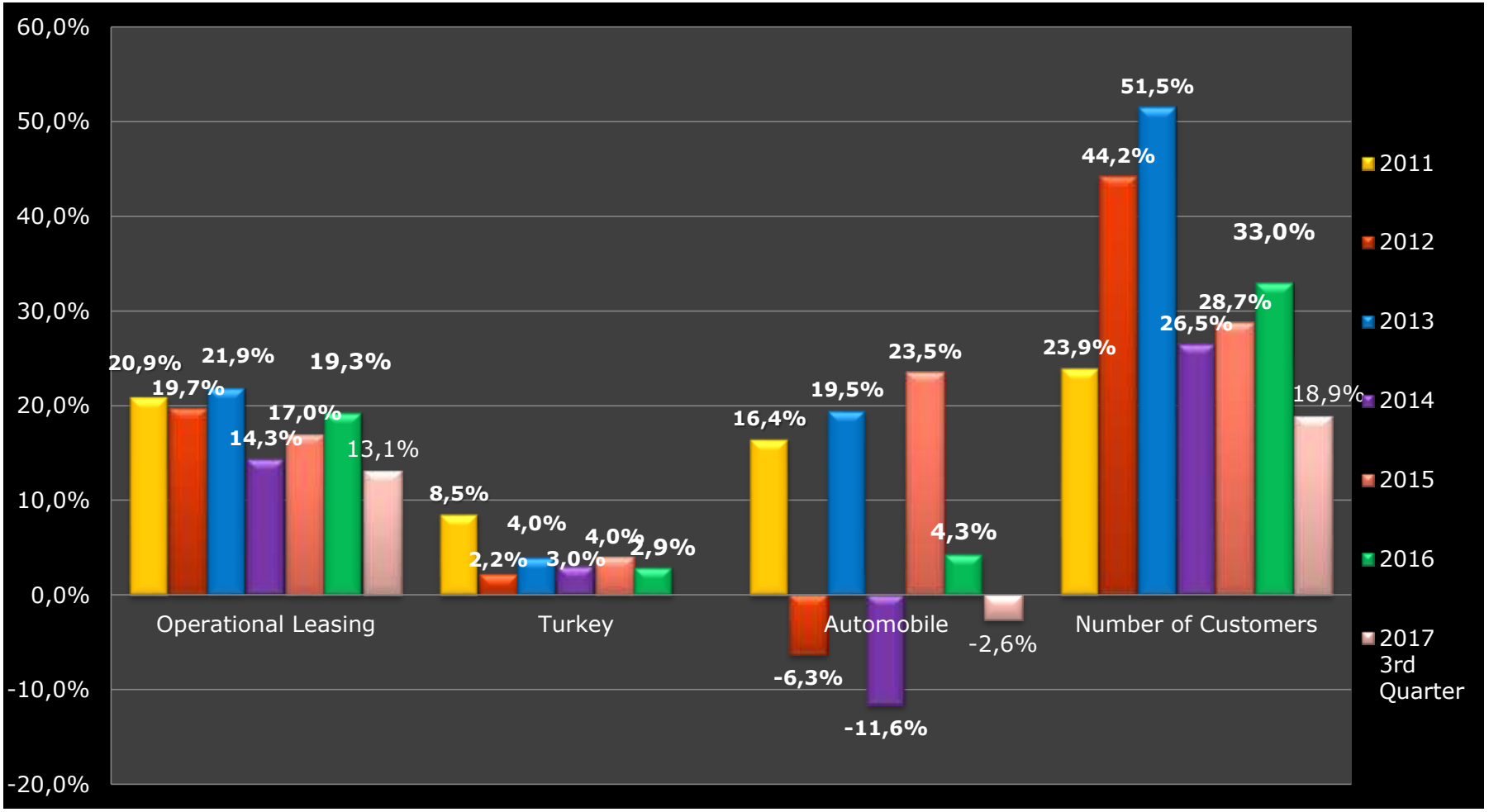
Comparison of The Customer Number Growth



**3rd Quarter of 2017 Turkey growth rate hasn't been announced yet.*

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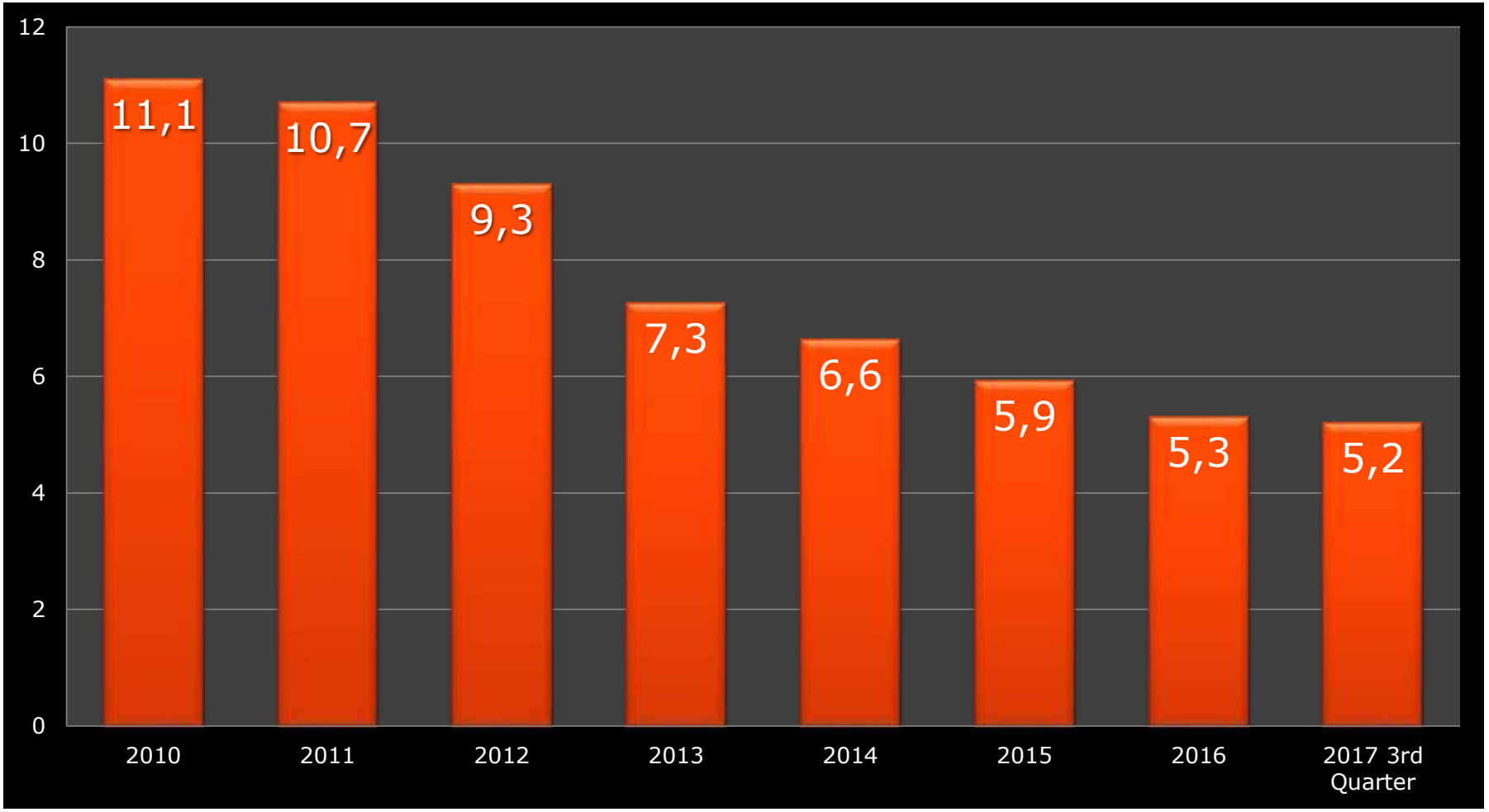
Sector – Number of Vehicles per Customer



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