KANTAR

TOKKDER
TÜM OTO KİRALAMA KURULUŞLARI DERNEĞİ
member of Leaseurope

TOKKDER

Operational Leasing Sector Report

End of First Half 2019

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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 become a reference and a professional umbrella organization in car rental business, of whom all actors in the sector wish to become a member of and to be the reference figure the legislator and the regulatory authorities seek consultance from.

About TOKKDER

- 125 Members
- Rent a Car and Operational Leasing Sectors
- Member structure that covers 80% of sector
- Member of Leaseurope

Leaseeurope has 45 members in 32 countries and is known with its effects on EU regulations.

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
  - Segment
  - Fuel type
  - Transmission type
- ✓ Total number of customers
- ✓ Within the period;
  - # of purchased and sold vehicles
  - Vehicle investment
  - Paid taxes (SCT, VAT, MVT)
- ✓ Number of contracts
  - Term & 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 Kantar 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:

2014	➔ 66,3 %
2015	➔ 67,5 %
2016	➔ 76,9 %
2017	➔ 78,2 %
2018	➔ 71,4 %
2019 1 st Half	➔ 67,9 %

Participating Companies

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- ALD AUTOMOTIVE
- ARKAS OTO FİLO YÖNETİMİ
- ATAKO DESTEK ARAÇ KİRALAMA
- AUTOLAND OTOMOTİV
- ESCAR FİLO KİRALAMA
- TEB ARVAL
- BORUSAN OTOMOTİV PREMIUM KİRALAMA
- OTO PLAN OPERASYONEL TAŞIT KİRALAMA
- BORLEASE
- DRD FİLO KİRALAMA
- GARANTİ FİLO
- HEDEF FİLO
- LEASEPLAN
- OTOKOÇ OTOMOTİV
- LİDER FİLO
- DENİZFİLO

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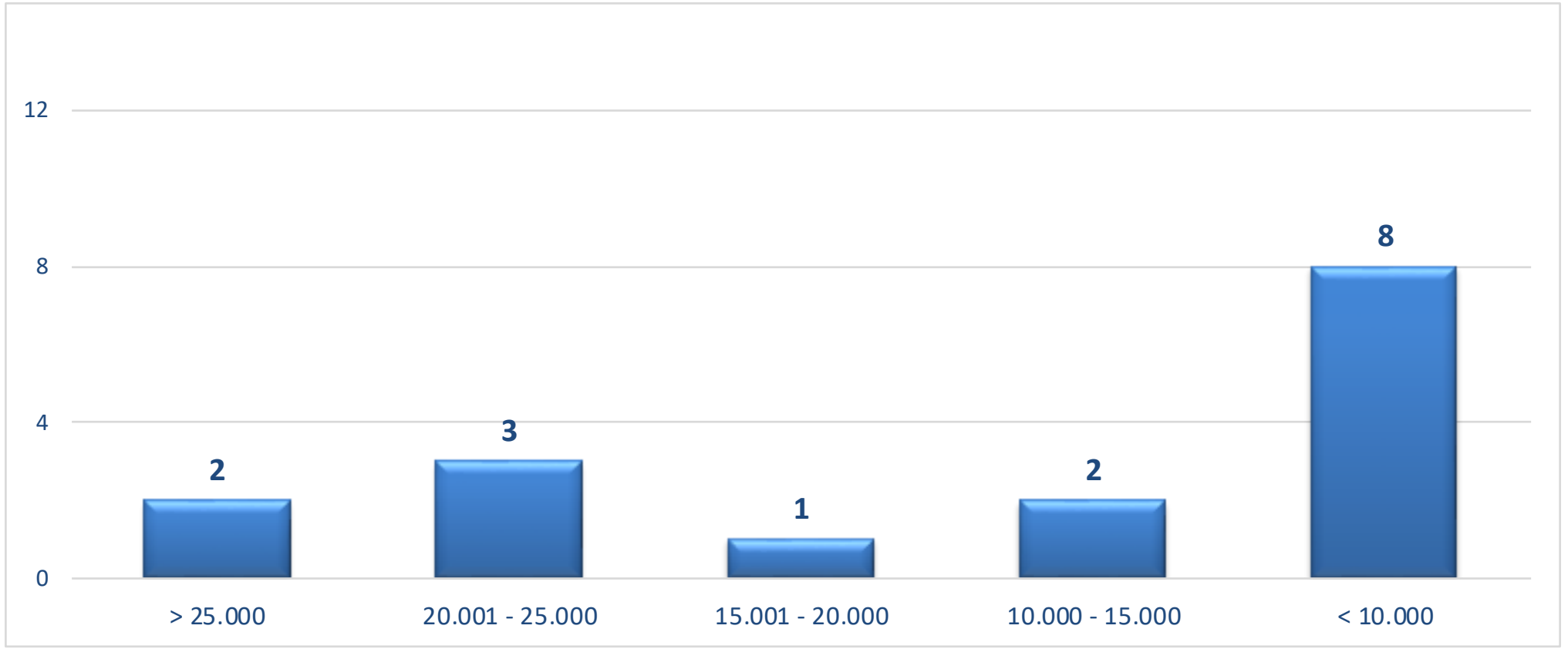
** Tan Oto Motorlu Araçlar and VDF Filo have stopped participating the research since Q1 2019*

Distribution according to Size - Participating Companies

2019 1.Half



3- Summary

Participants and Sector Estimates

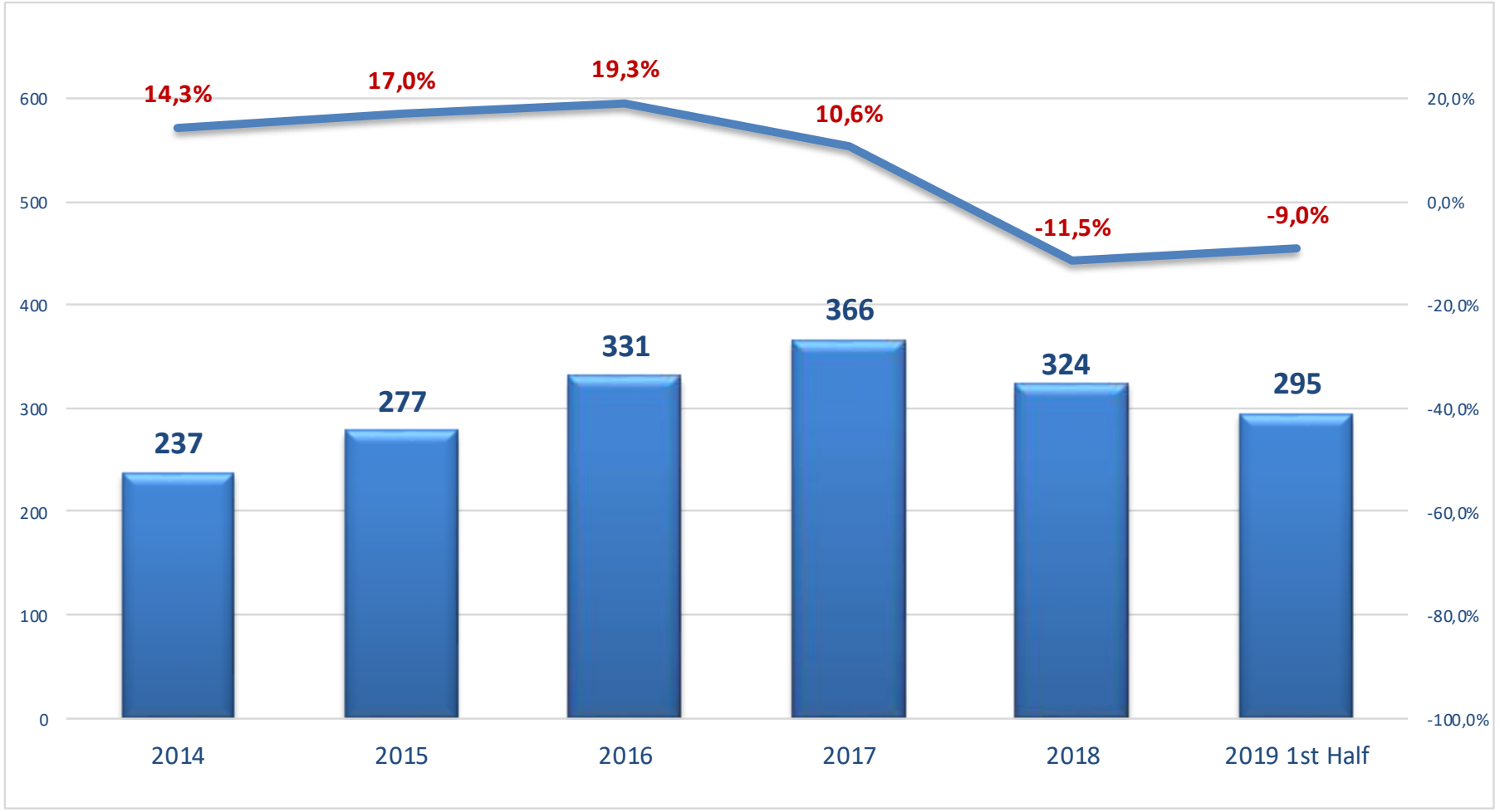
*Summary/ 2019 1.Half**

	Participants	Sector Estimates
# of Vehicles (000)	200	295
# of Purchased Vehicles (000)	12,2	17,9
# of Sold Vehicles (000)	32,0	47,1
# of Customers (000)	33,3	49,0
Amount of Purchased Vehicles (Bn TL)	1,368	2,013
Tax Paid (Bn TL) VAT+MVT+SCT	0,722	1,063
Sum of Actives (Bn TL)	19,456	28,633

- Items representing the status as of the end of the period (Q2) : # of Vehicles, # of Customers,Sum of Actives
- Items representing Jan – Jun period (summed items for Q1 and Q2) : # of Purchased / Sold Vehicles, Amount of Purchased Vehicles & Tax Paid

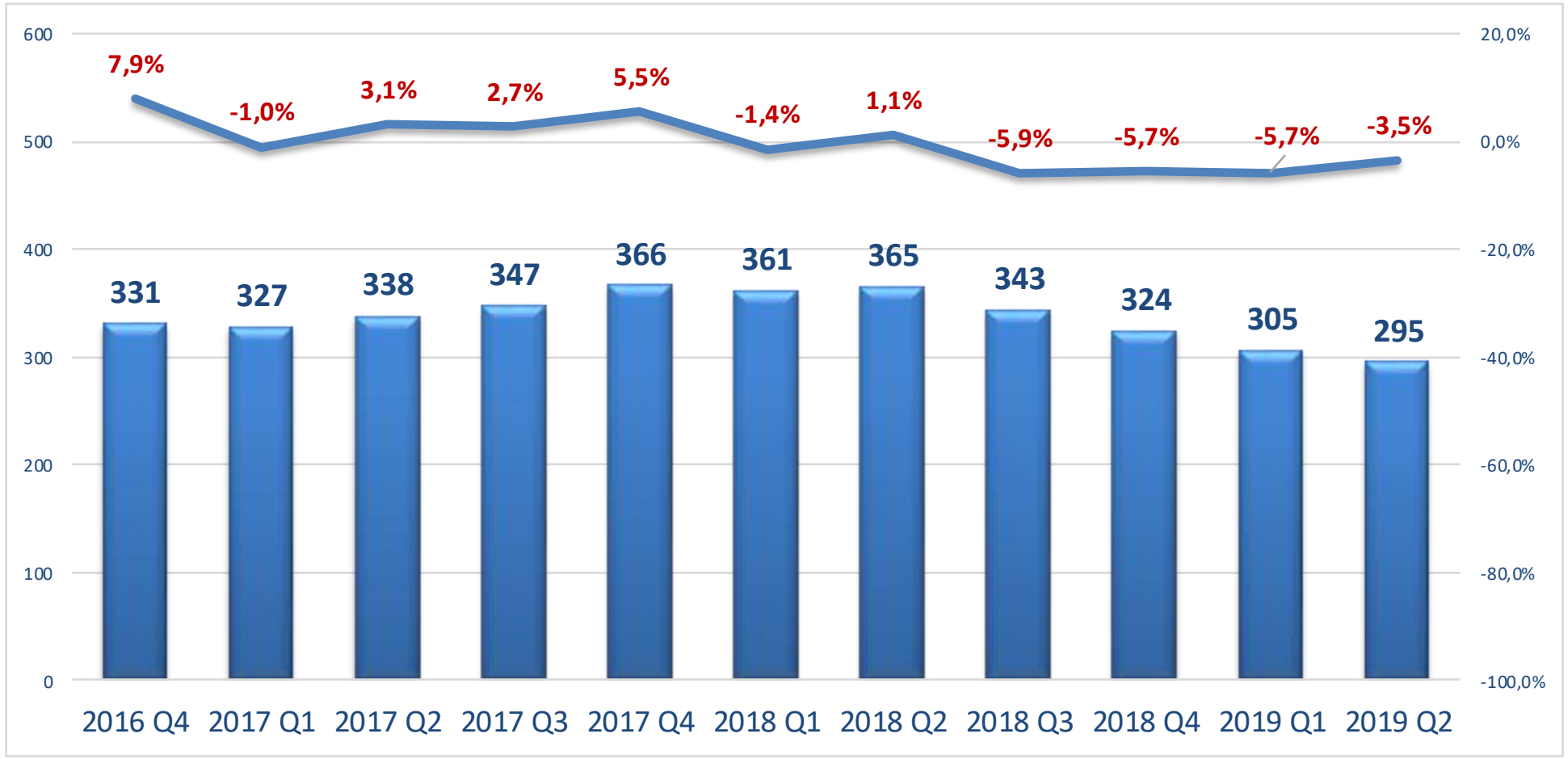
Estimated Growth of Vehicle Park of the Sector

Annual



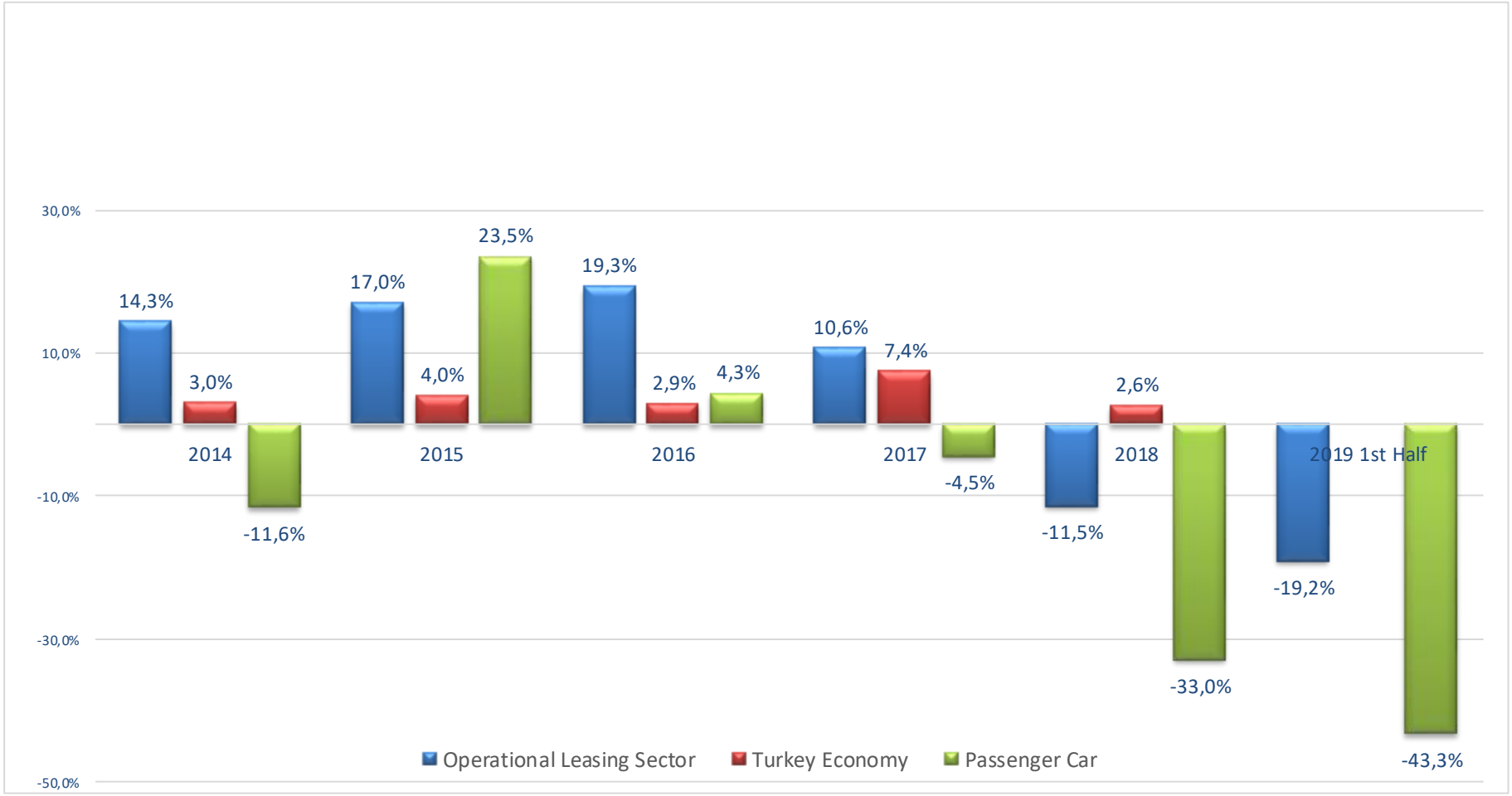
Estimated Growth of Vehicle Park of the Sector

Quartely



Growth Rates / Benchmarks

Turkey Economy / Automotive Sector / Operational Leasing Sector



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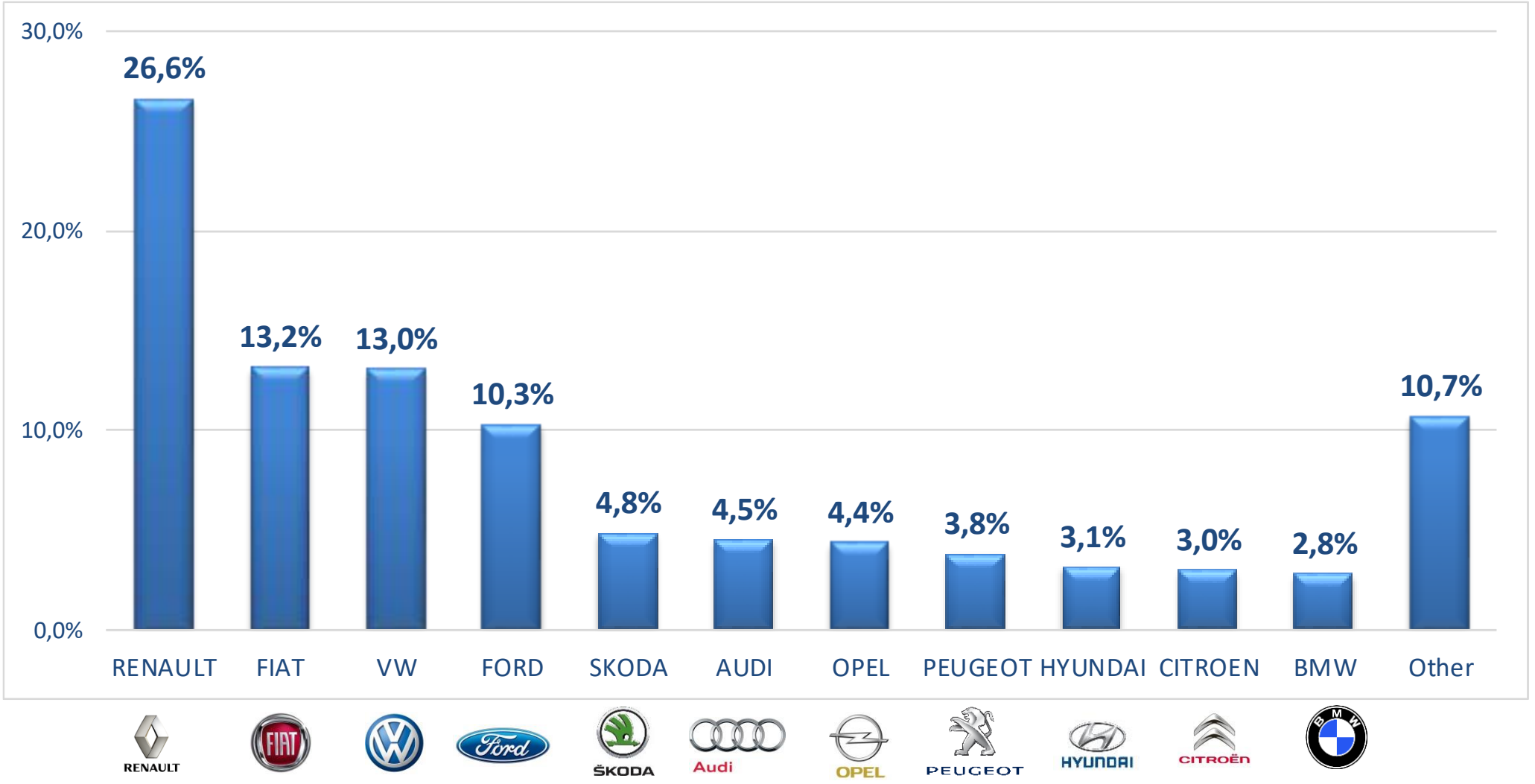
* Source : ODD data used for Passenger car growth.
* H1 2019 growth rate (GDP) for Turkey has not been published yet.
* H1 2019 is compared to H1 2018.

4- Vehicle Park

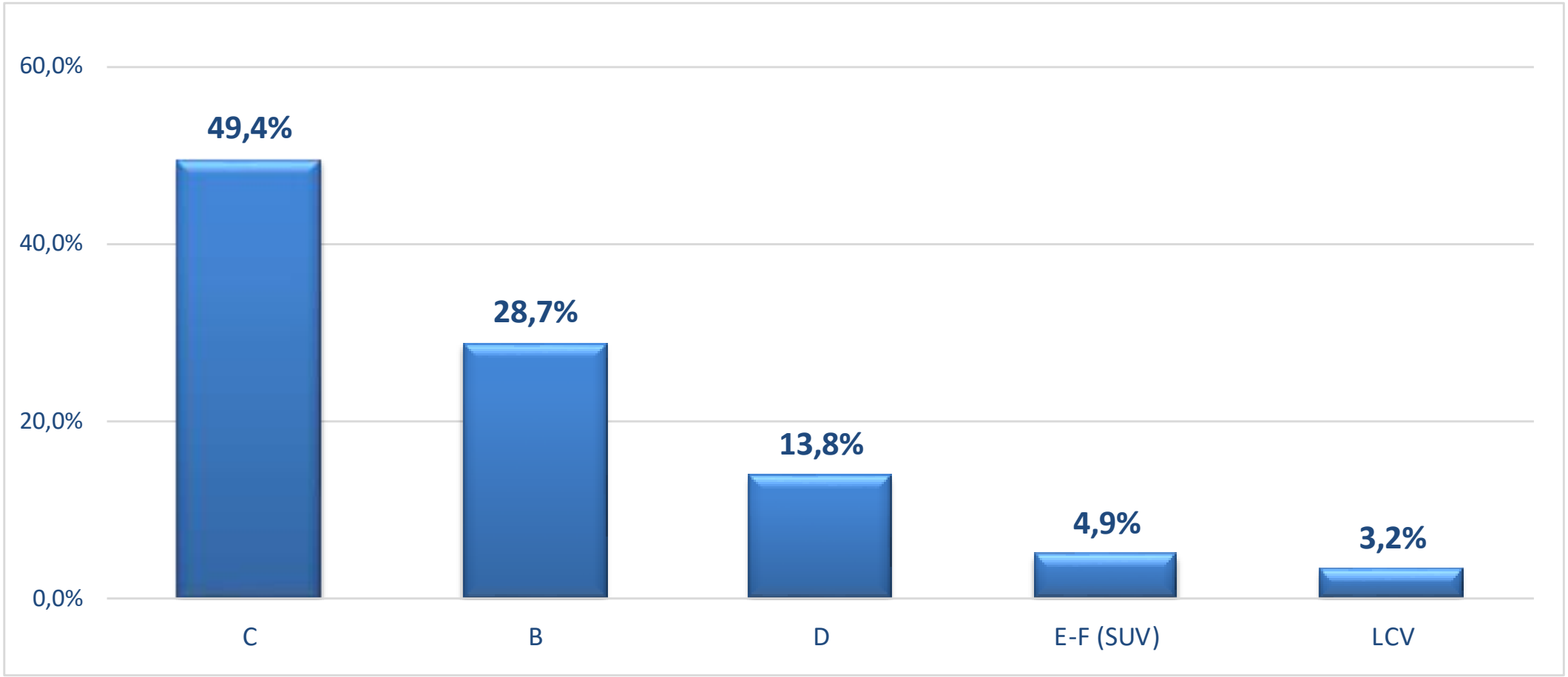
Make based Distribution

2019 1.Half



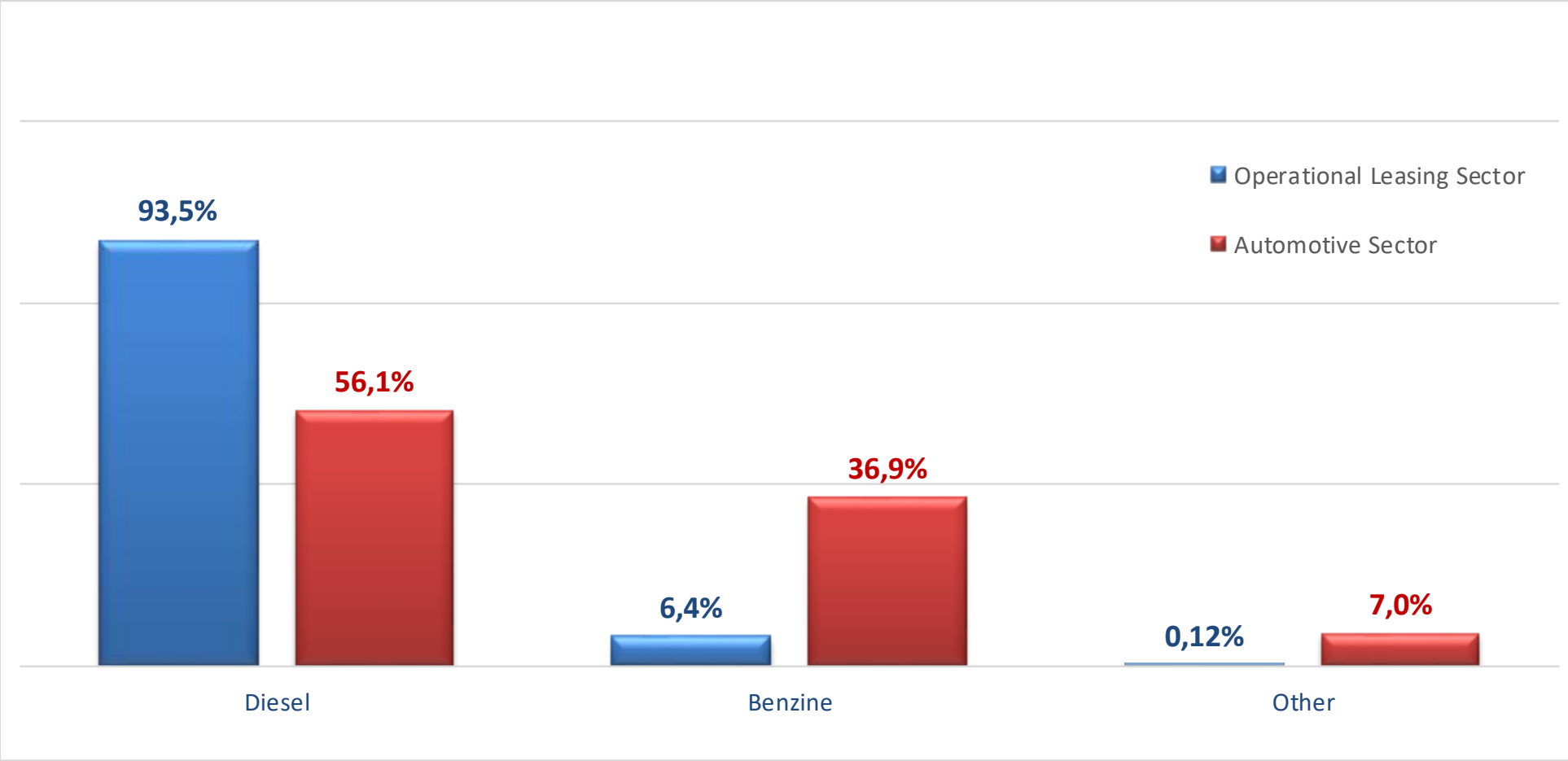
Vehicle Segments

2019 1.Half



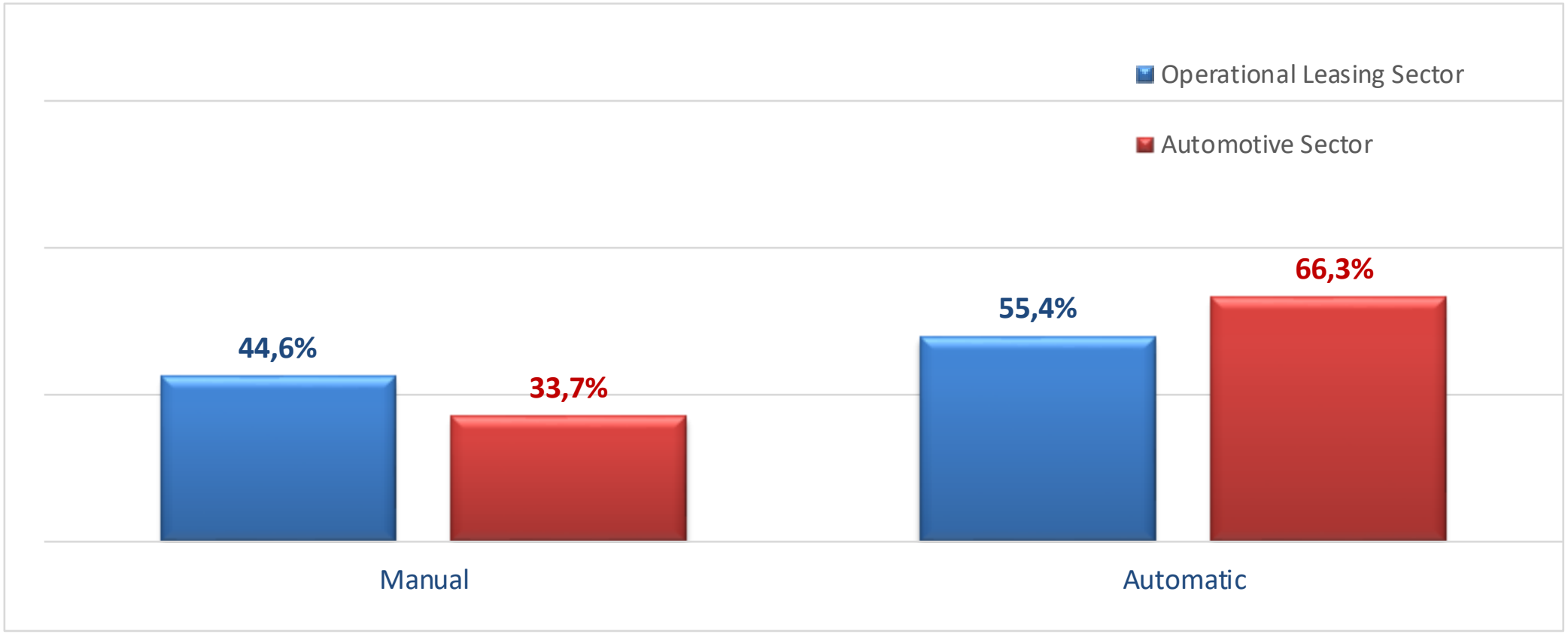
Fuel Type

2019 1.Half



Transmission Type

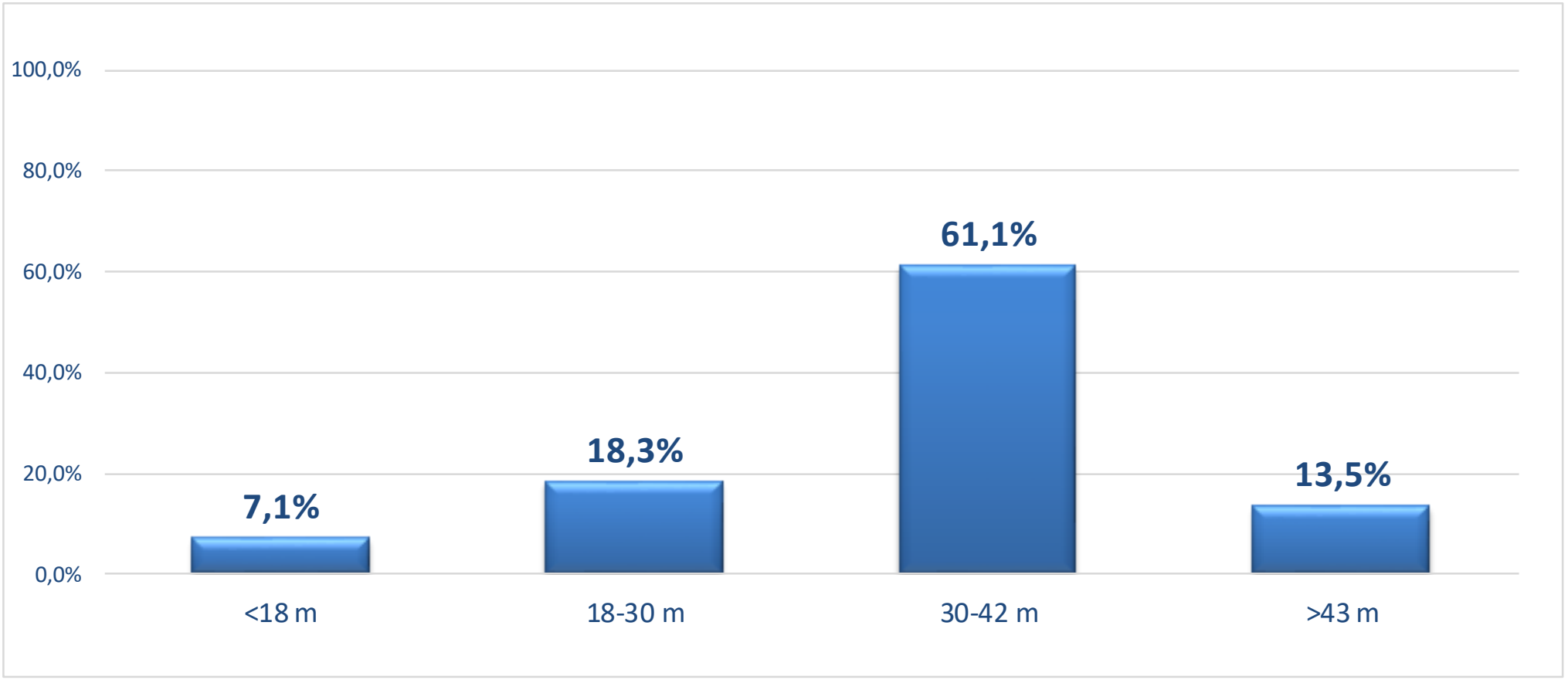
2019 1.Half



5- Contract Structure

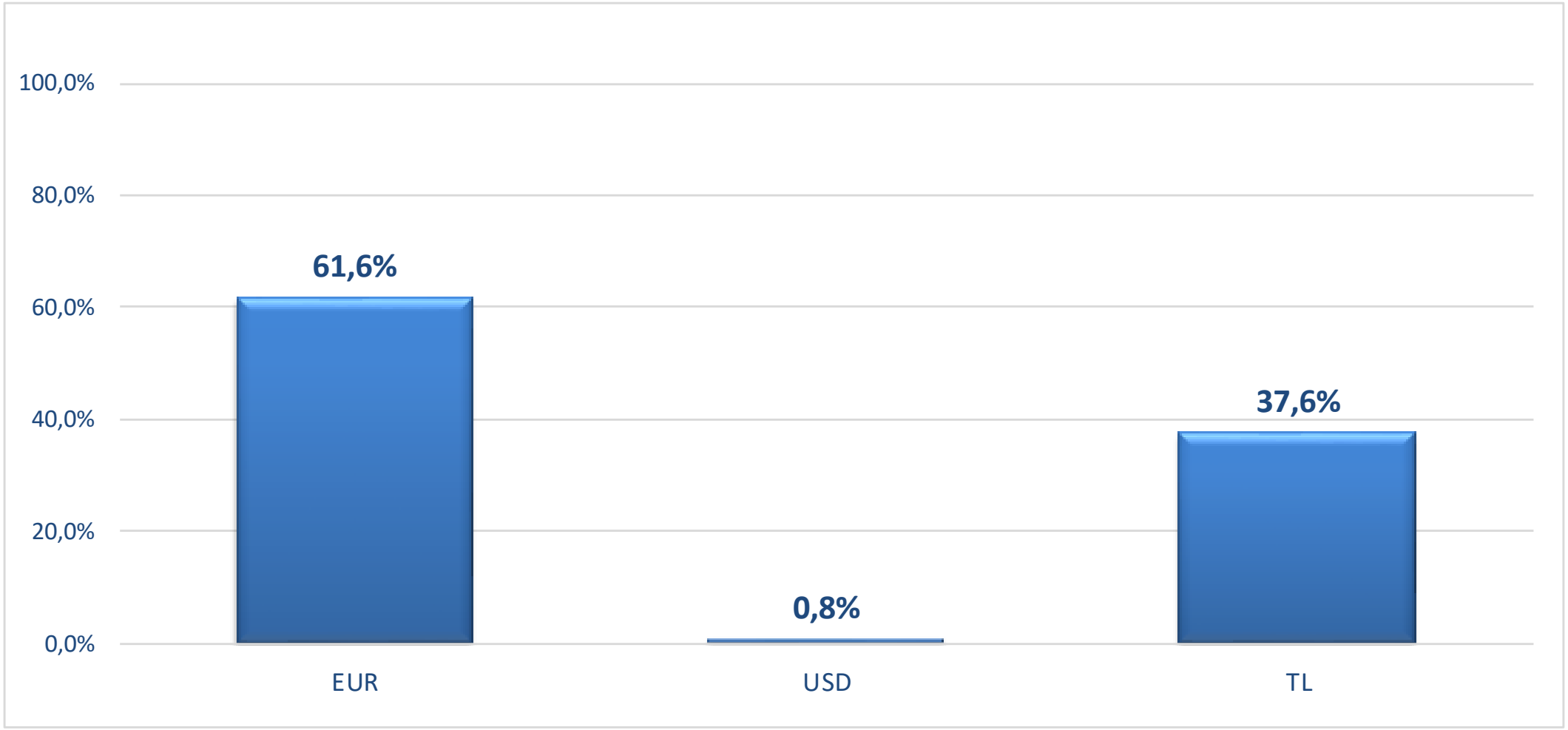
Contract Features / Terms (Months)

2019 1.Half



Contract Features / Currency

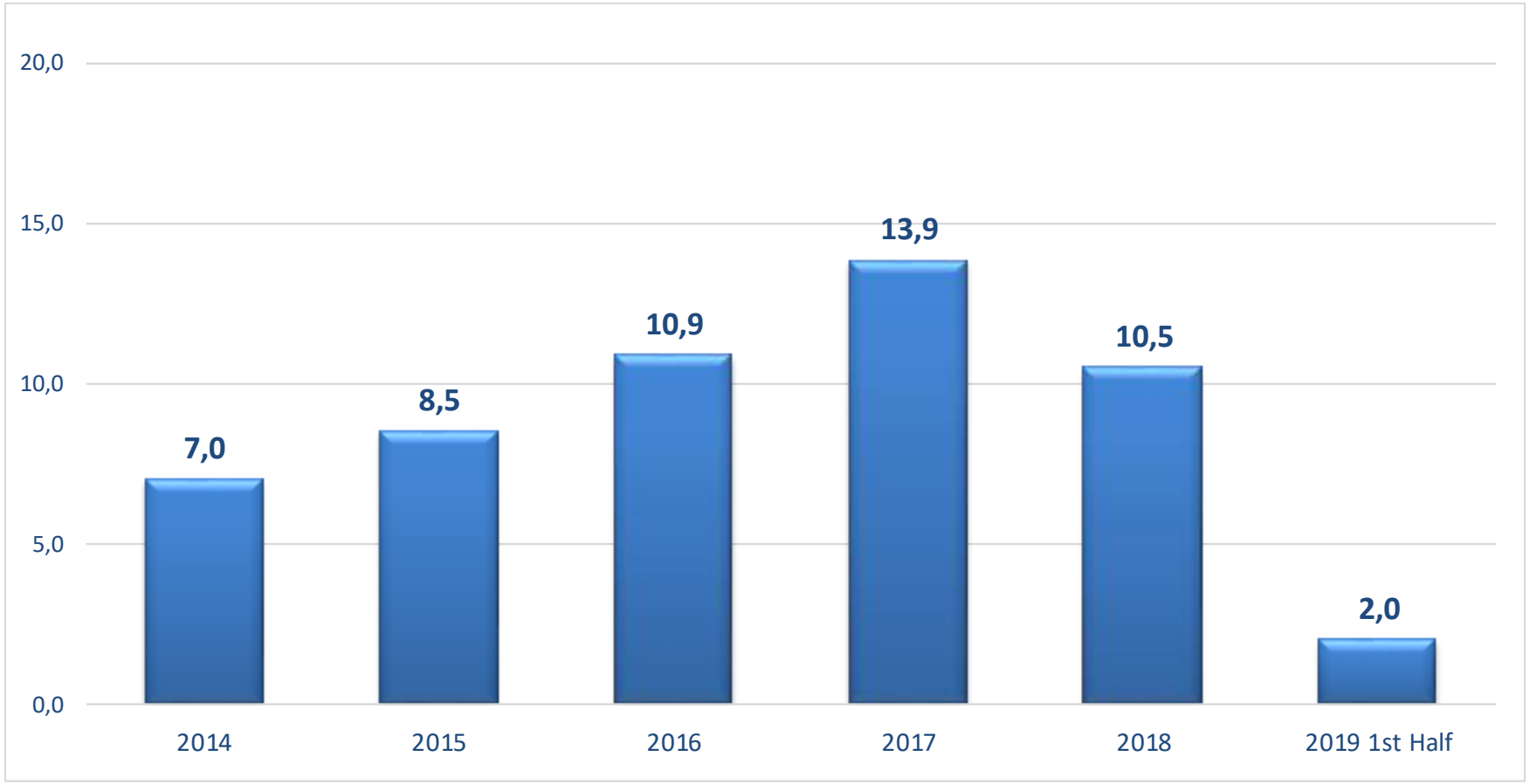
2019 1.Half



6- Vehicle Investments, Purchases, Sales and Paid Taxes

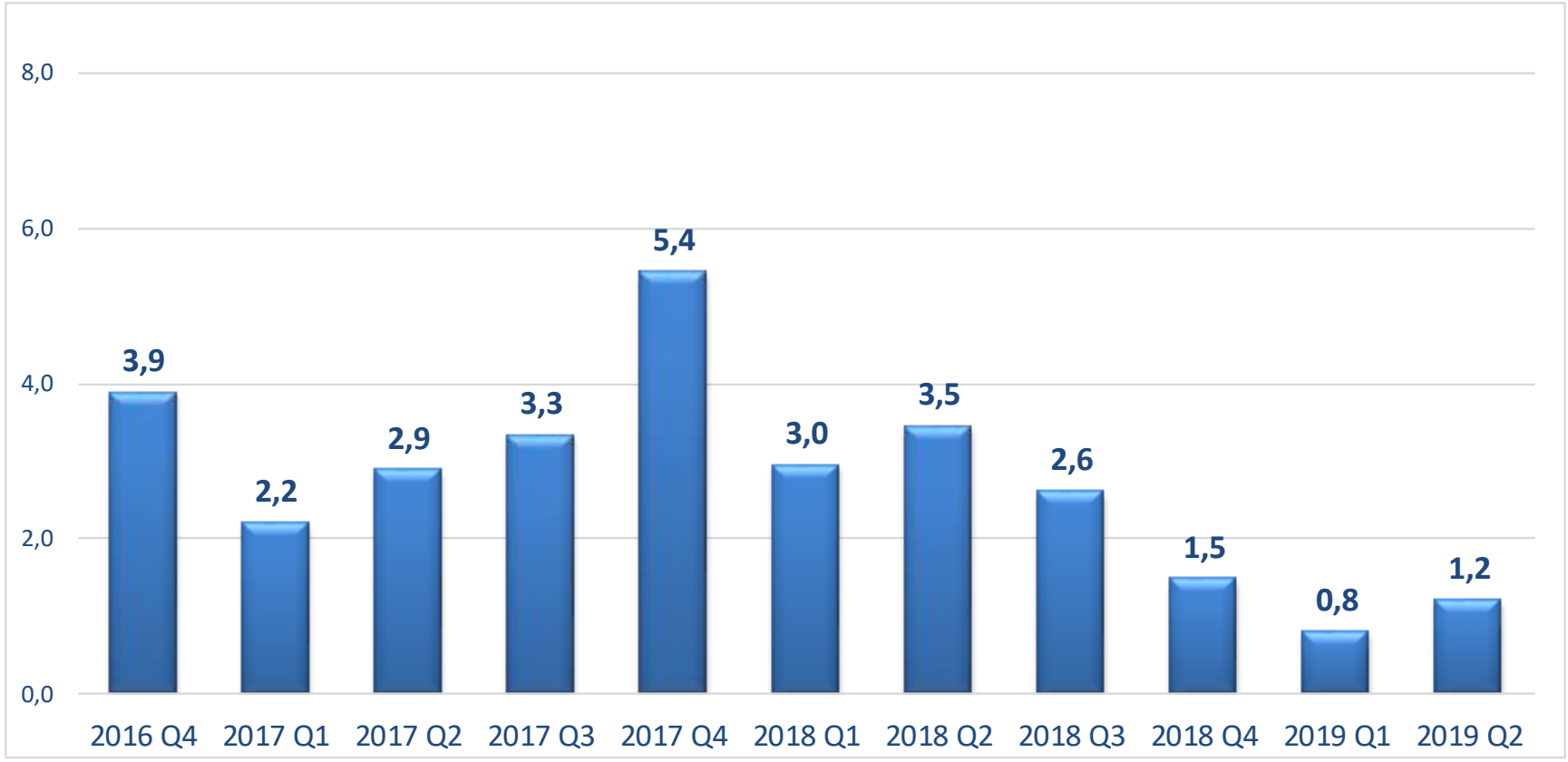
Vehicle Purchases – Billion TL

Annual



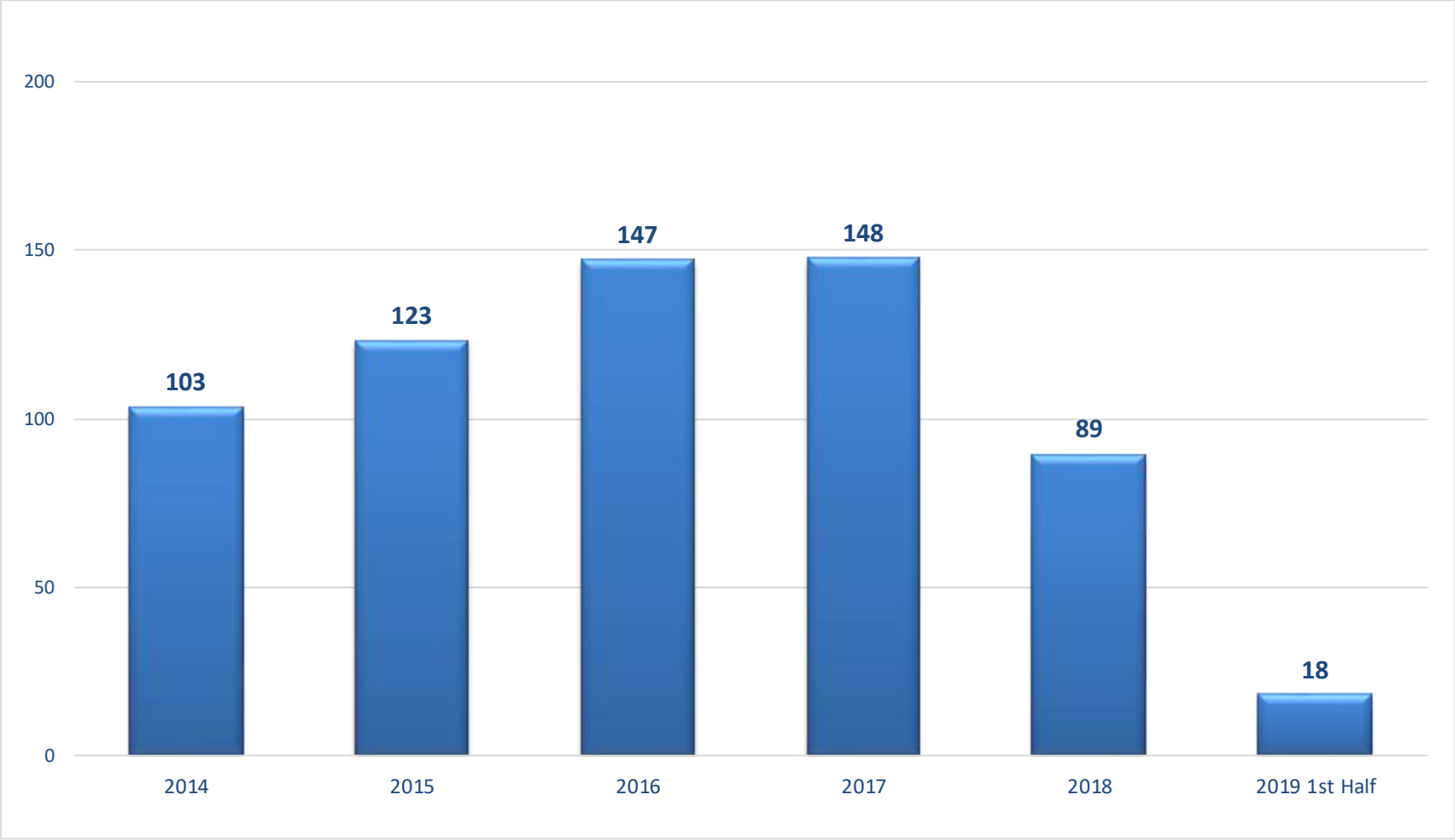
Vehicle Purchases – Billion TL

Quarterly



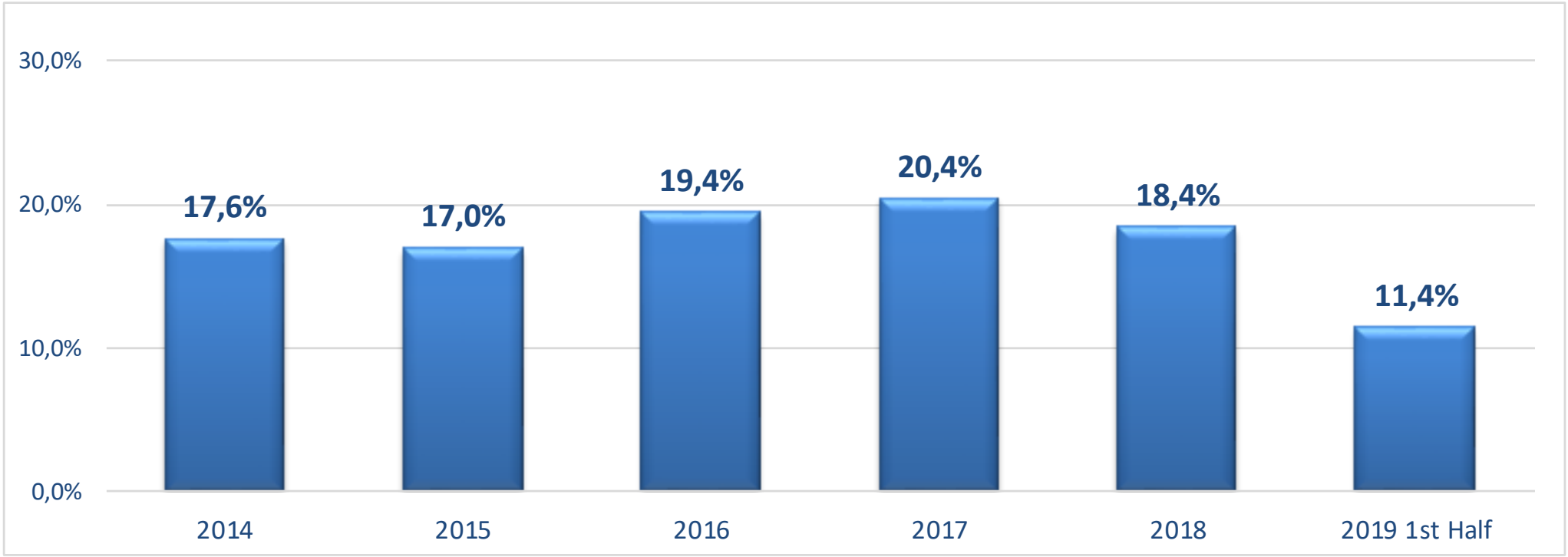
Number of Purchased Vehicles (000)

Annual



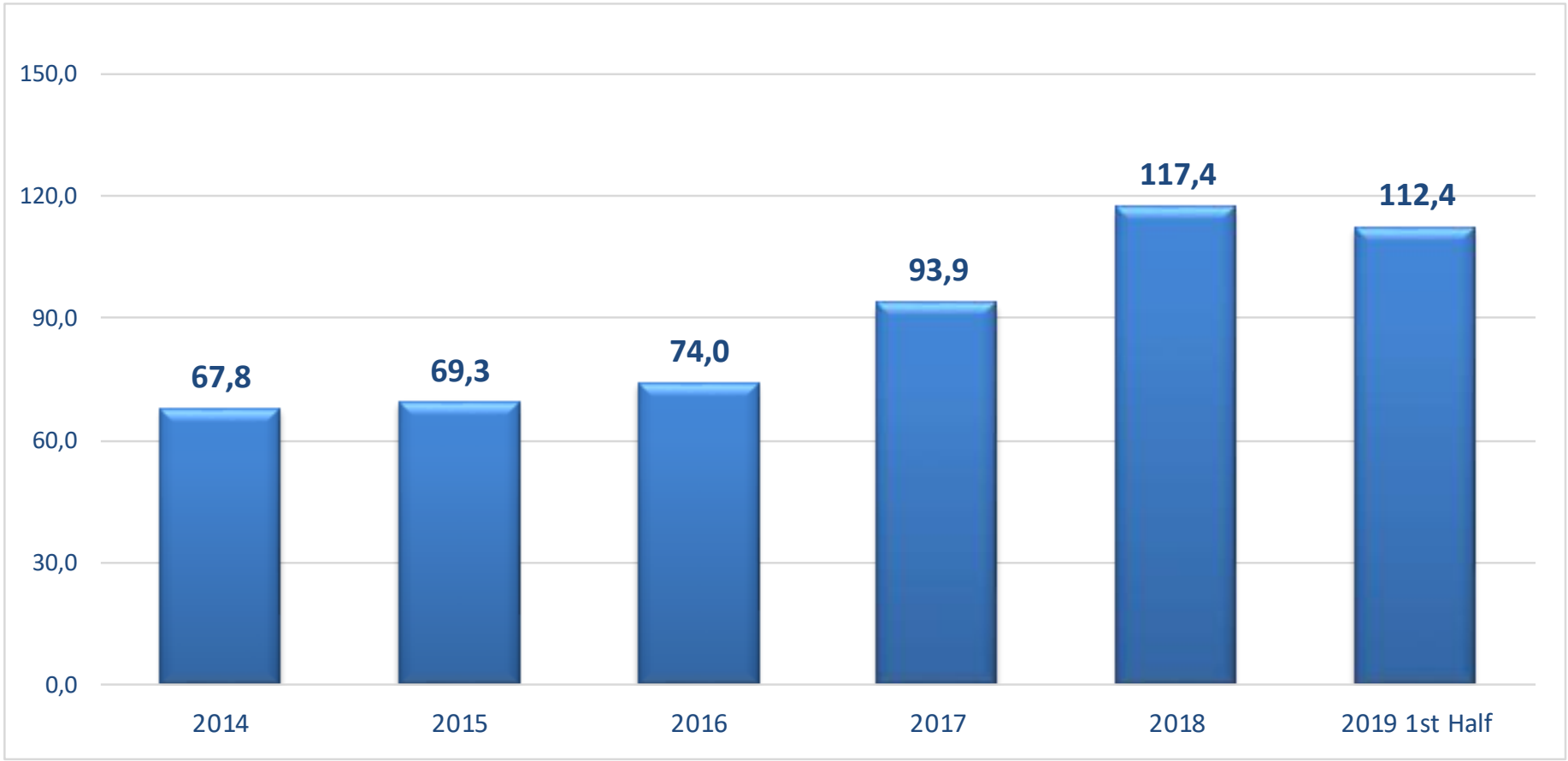
Operational Leasing / Share in Automobile Purchases

Annual



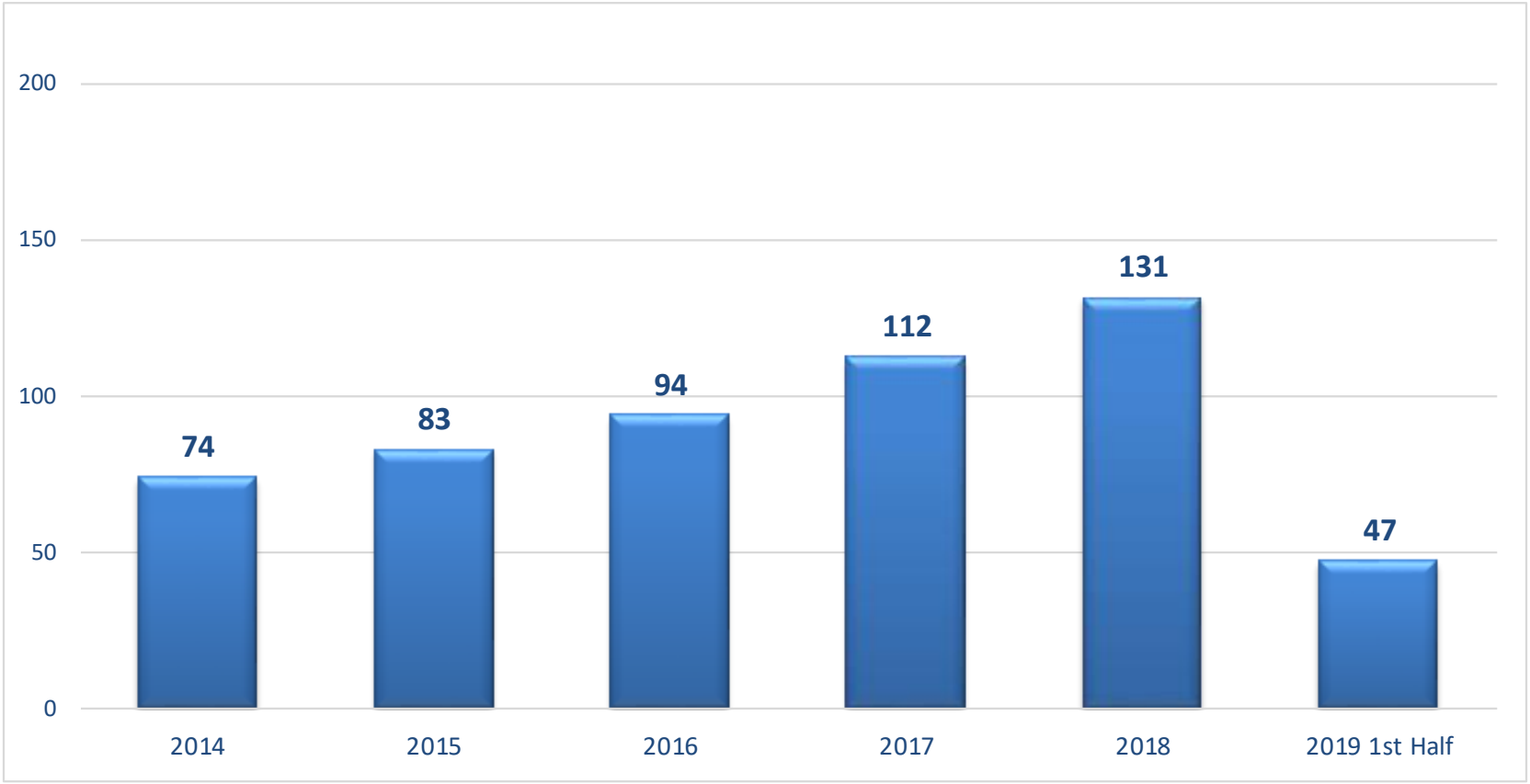
Average Price for Purchased Vehicles (000 TL)

Annual



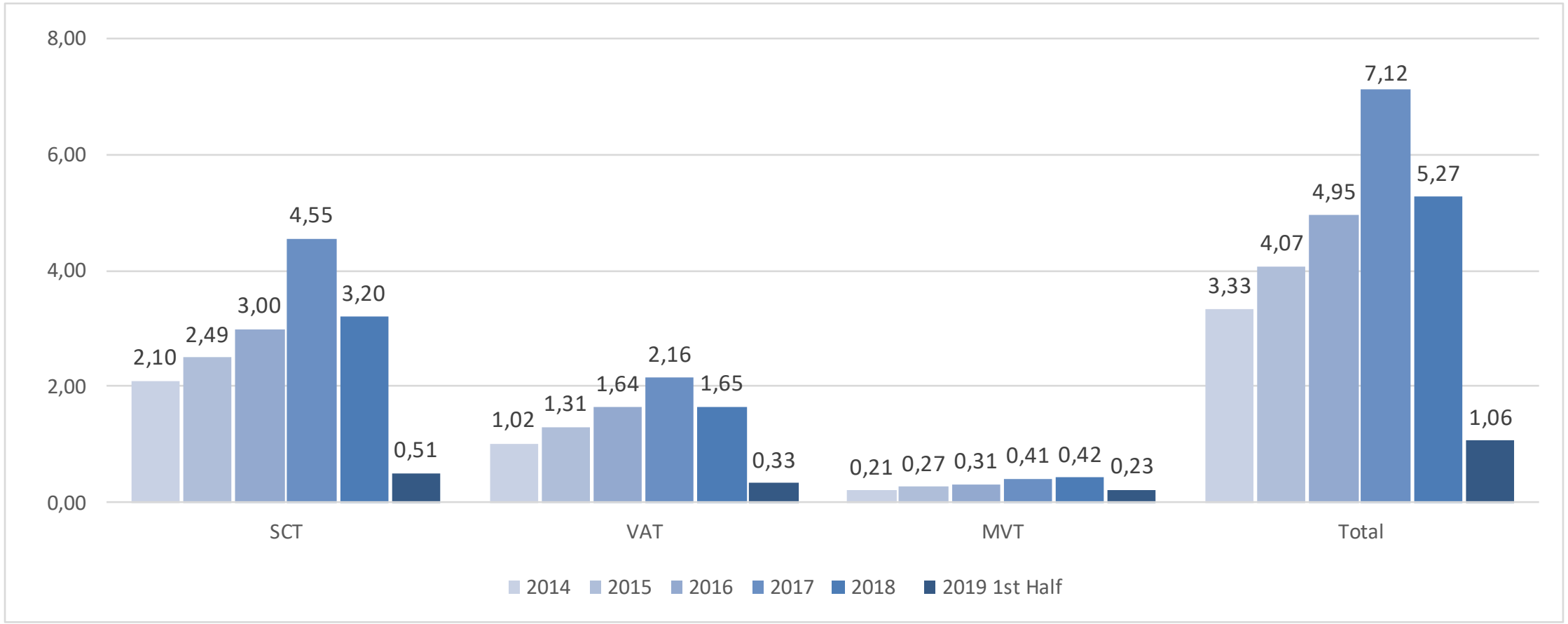
Estimated # of Vehicles Sold for the Sector (000)

Annual



Sector Tax Trend

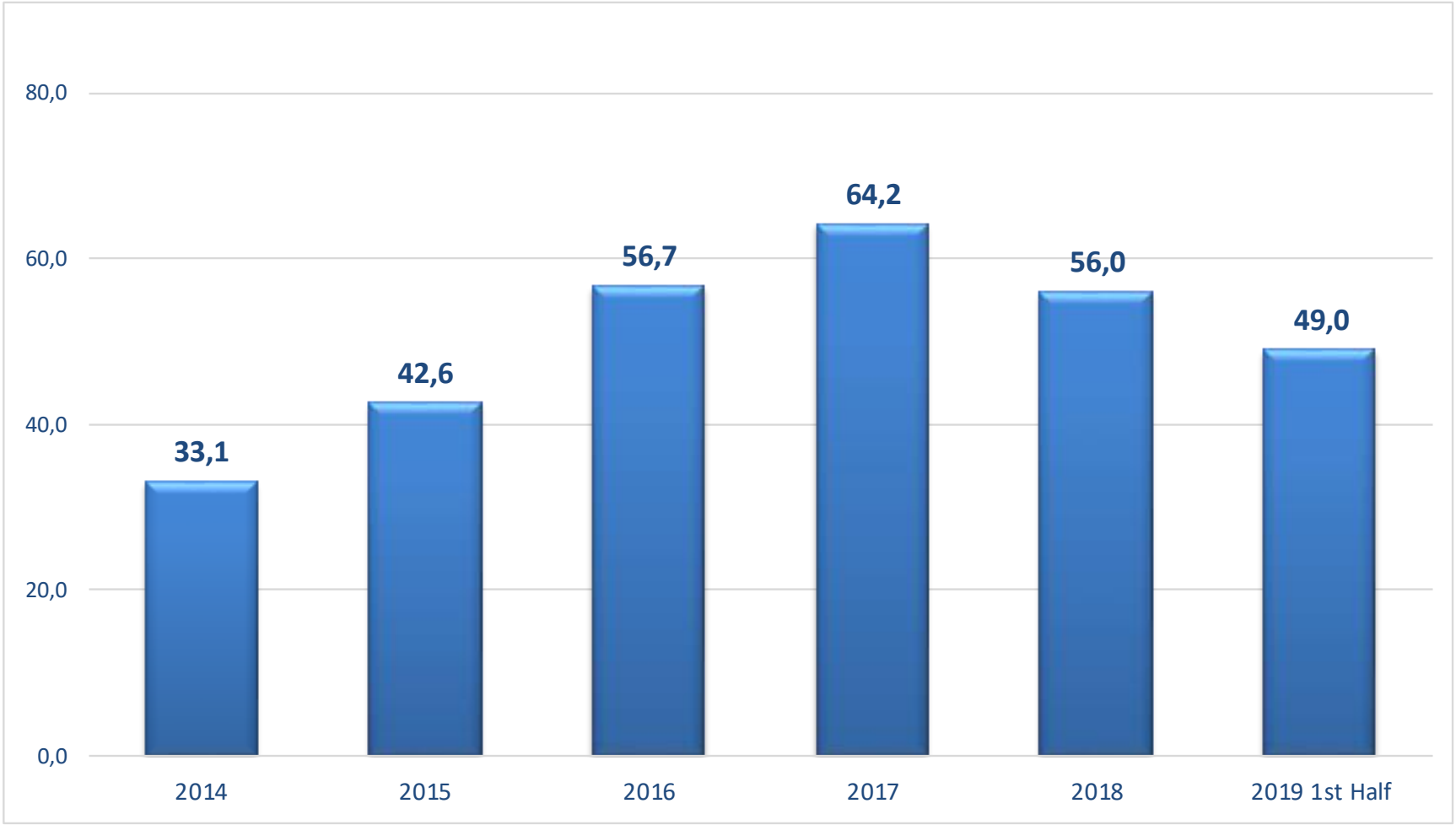
Billion TL



7- Number of Customers

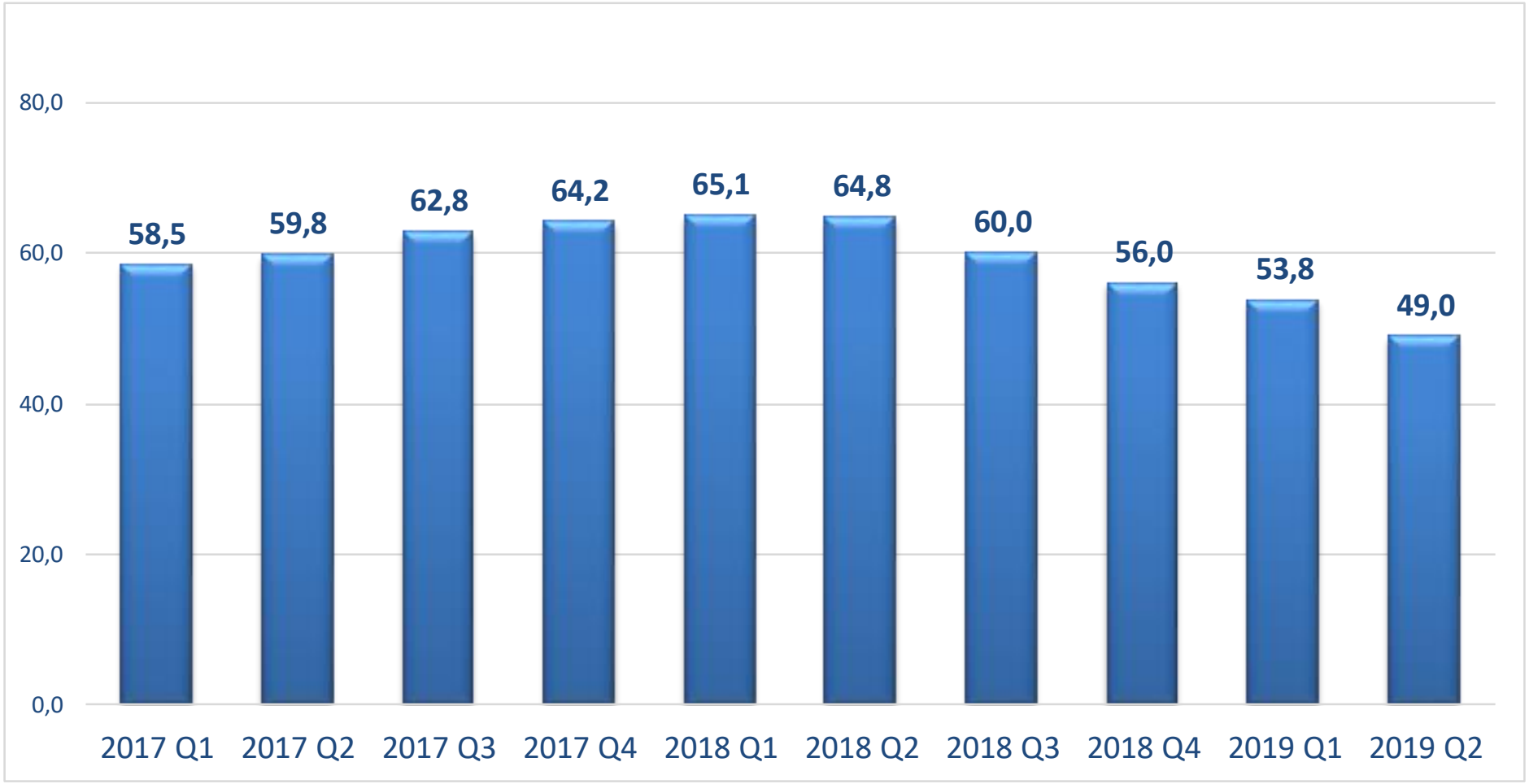
Total Number of Sector's Customers (000)

Annual

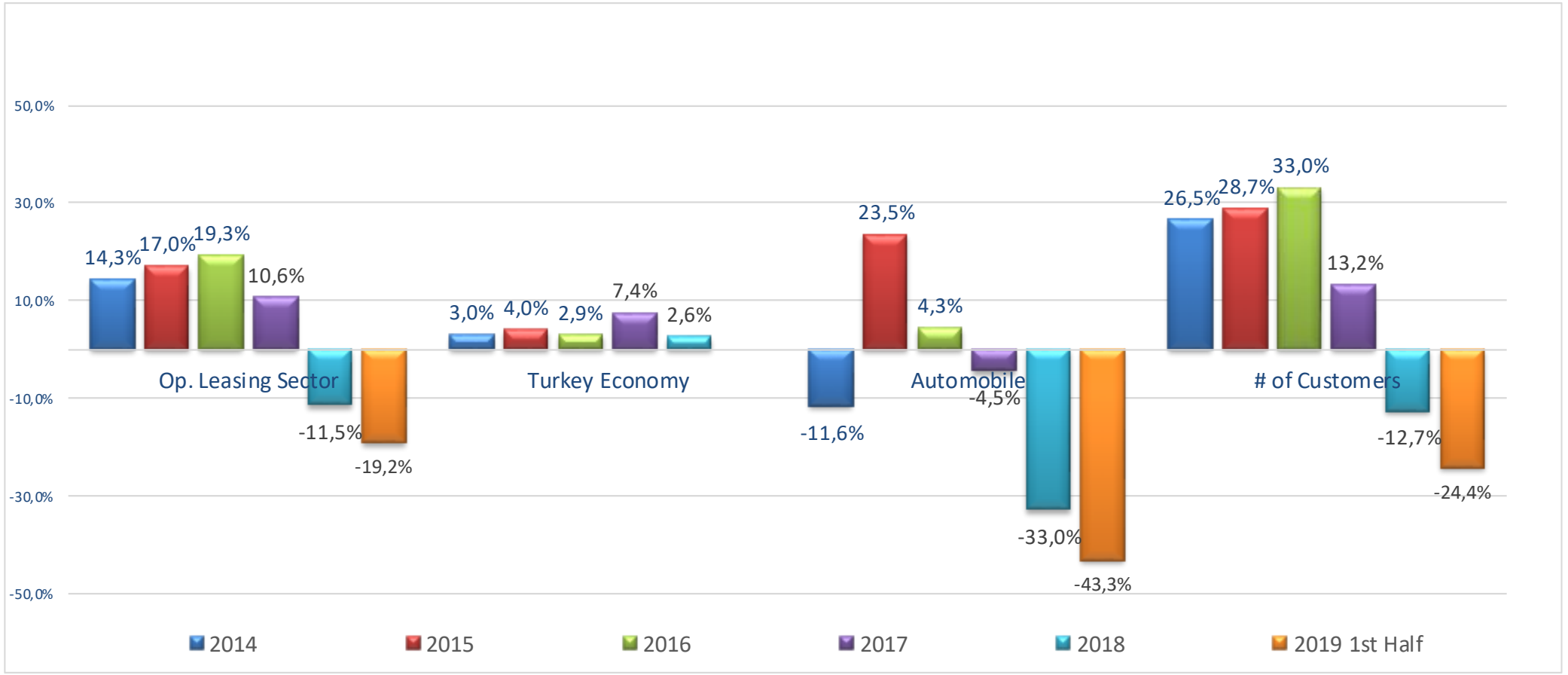


Total Number of Sector's Customers (000)

Quartely



Comparison of The Customer Number Growth



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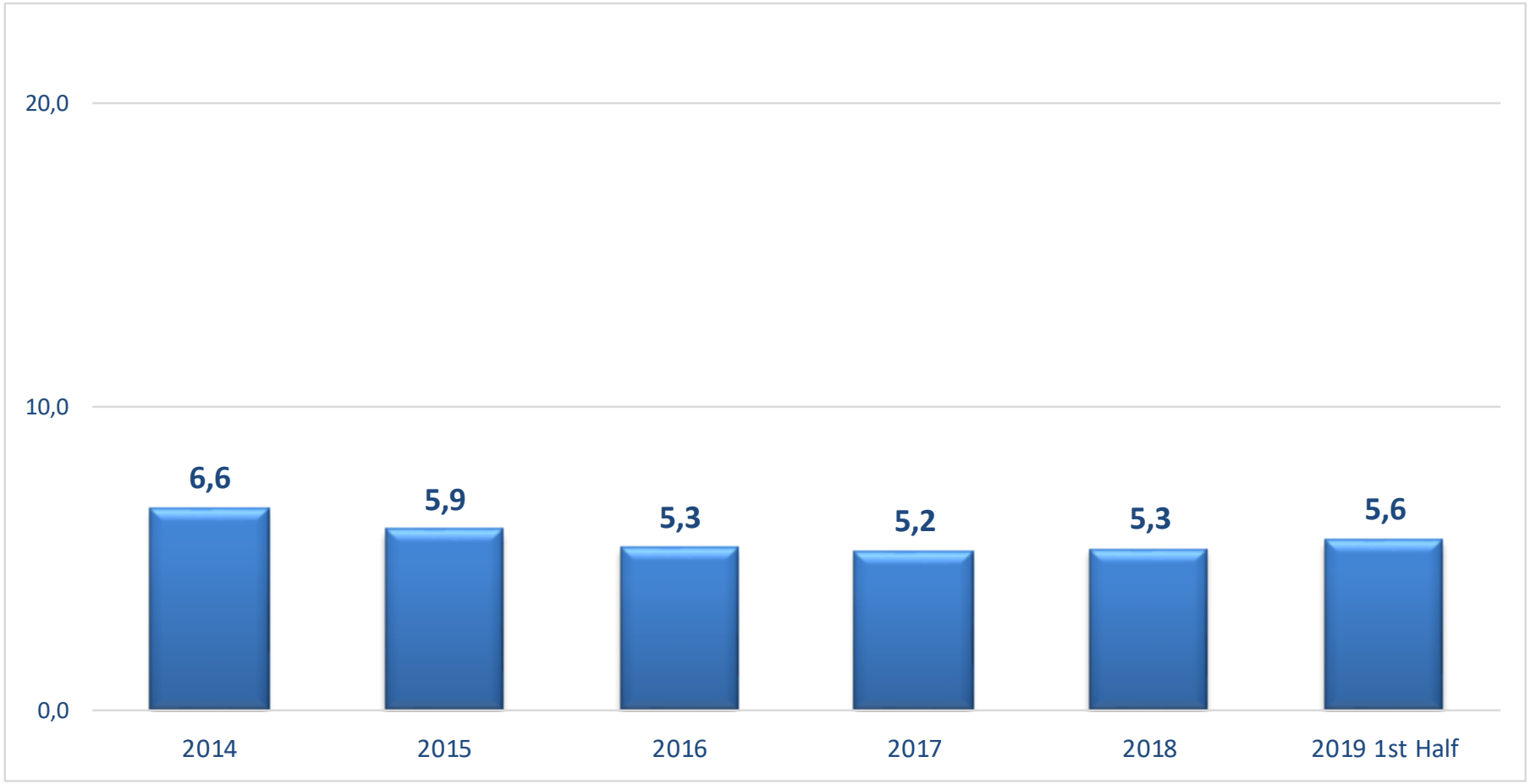
- H1 2019 is compared to H1 2018.

Number of Vehicles per Customer

Annual