

# The World Market for Car Rental

July 2025

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Our expert's view of the car rental market in 2025

Car rental snapshot

Key findings

Developed economies lead, but emerging markets have large untapped potential

Top five trends in car rental industry

Top five trends uncovered

Drivers of consumer markets and impact on car rental market

Adjacent industries and how they impact the car rental market

## STATE OF THE INDUSTRY

Industry forecast to sustain growth, backed by growing travel flows

Leisure car rental dominates the market

North America remains the global leader, driven by US demand

#### **COMPANIES**

Top companies in global car rental market: Established players maintain their positions

Top companies by absolute growth: Brazilian companies in the lead

Car rental market in the largest countries is heavily concentrated

#### **CHANNELS**

Online sales dominate, but offline channel still popular in emerging markets

Taiwan, Italy and South Korea drive online sales growth

Offline sales experience strongest growth in Brazil, Colombia and Saudi Arabia

# **FUTURE OUTLOOK**

US forecast to maintain the lead, Brazil to emerge among top 3 markets

UAE, Japan and South Korea to enjoy the strongest absolute revenue growth

Asia Pacific forecast to increase its lead over Europe

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USA

China

UK

Brazil Japan

Germany

France

South Korea

Spain

Australia

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