

RAC MARKET 2017 UKRAINE

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UKRAINIAN RENTAL MARKET STATISTIC

Members of UUL

Index	2015	2016	Δ , %
Rental Fleet	669	814	+22%
Rental Stations	37	44	+19%
Rental Days	37 841	52 179	+38%
Rental Transactions	12 364	16 032	+30%

MARKET DESCRIPTION

- High risk market, no barriers for market entry for RAC operators, clients fraud, economic instability;
- Low level of market recognition from local client;
- Low level of organization of market players, absence of real reliable statistics;
- Medium to high level competition;
- Differential level of service and transparency;
- Two main market sectors International and local operators;

MARKET TENDENCY 2017 & NEAR FUTURE

- Increasing popularity among local clients;
- Increase of Inbound clients due to relative economic and geopolitical stability;
- Improvement and diversification of the RAC fleet (car types, cars quality and age);
- Implementation of new services: Wi-Fi, car warranty option, development of RAC mobile Apps, stress free rent (road assistance, full coverage insurance);

WHAT THE MARKET NEEDS?

- Improved roads and electric cars support infrastructure;
- Promotion of Ukraine on the international arena as tourist and business destination in the heart of Europe;
- Improved legislation to assure the rights of the RAC companies (copy of car registration, compulsory POA for border crossing);
- Recognize RAC car that not return on schedule as theft;
- Implementation of International RAC practice for all RAC companies in Ukraine;
- We as representatives of the RAC market should always remember that we represent not only our brand and shareholders we represent Ukraine in the eyes of our inbound and local clients;

RAC FUTURE

- Transition to electric cars in 5 years and later to fully automated cars service;
- Increase of time shearing services mainly in major cities;
- Transition to different operational model of the RAC companies that will continue to be the holders of the fleet as the professionals in the filed;
- Consolidation of the global market some of the global Plyers today wont survive in the long run of 10-15 years;
- Model of car owning will be replaced to using service of RAC car;
- All cars will be provided for customer use with service package;

AUTONOMOUS FUTURE IN 3-5 YEARS



Autonomous cars could be deployed by 2020 or sooner

General Motor's head of foresight and trends Richard Holman said at a conference in Detroit that most industry participants now think that self driving cars will be on road by 2020 or sooner. (Source Wall Street Journal, 20.05.2016)



TOYOTA

First autonomous Toyota to be available in 2020

Toyota is starting to overcome its long standing reluctance with respect to autonomous driving: It plans to bring the first models capable of autonomous highway driving to the market by 2020. (Source: Wired.com, 08.10.2015)



Audi

Audi to introduce a self driving car by 2020

Scott Keogh, Head of Audi America announced at the CEW 2017 that an Audi that really would drive itself would be available by 2020. (Source: IEEE Spectrum. 05.01.2017).



TESLA

Elon Musk now expects first fully autonomous Tesla by 2018, approved by 2021

In an interview by Danish newspaper Borsen, Tesla's founder accelerates his timeline for the introduction of fully autonomous Tesla by 2 years! Compared to his estimate less than a year ago (October 2014), He now expect fully autonomous Tesla to be ready by 2018 but notes that regulation approval may take 2 to 3 more years thereafter.

(Source: Borsen interview on YouTube, recorded on 23/09.2015)

AUTONOMOUS FUTURE IN 3-5 YEARS



Volkswagen

Volkswagen expects first self driving cars on the market by 2019

Johann Jungwirth, Volkswagen's appointed head of Digitalization Strategy, expects the first self driving cars to appear on the market by 2019. He did not claim that these would be Volkswagen models. (Source: Focus, 23.04.2016)



Ford CEO announces fully autonomous vehicle for mobility services by 2021

Mark Fields, Ford's CEO announced that the company plans to offer fully self driving cars by 2021.

The vehicles which will come without steering wheel and pedals, will be targeted to fleets which provide autonomous mobility services. Fields expects that it will take several years longer until Ford will sell autonomous vehicles to the public, (Source: Reuters, 16.08.2016)