

## **Brazil Vehicle Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Brazil Vehicle Rental Market Analysis

The Brazil vehicle rental market is expected to grow from USD 8.75 billion in 2025 to USD 9.32 billion in 2026 and is forecast to reach USD 12.76 billion by 2031 at 6.49% CAGR over 2026-2031. This outlook is underpinned by the rebound of domestic leisure trips, the rapid digitalization of booking channels, and corporate preference for outsourced fleets. Passenger-car rentals lead demand because they match both tourist and business travel requirements, while electric-vehicle uptake is growing on the back of favorable Chinese OEM financing. Fleet operators are also scaling quickly as companies convert capital expenditure into operating leases to navigate Brazil's high-interest-rate environment. The Southeast region keeps the largest revenue base, yet the Northeast is catching up thanks to new low-cost airline routes that push fly-drive itineraries and lift overall utilization rates across the Brazil vehicle rental market.

Brazil Vehicle Rental Market Trends and Insights

Boom in Domestic Leisure Tourism Post-COVID

Brazilian travel and tourism contributed USD 167.6 billion to GDP in 2025, equal to 7.7% of national output. Leisure trips represent 89.9% of total travel spend, lengthening average stays to 13.1 nights and pushing longer vehicle-rental periods. Government promotion programs such as the 2025-2027 "Plano Brasil" reinforce this trajectory by aiming to attract 8 million foreign visitors. Extended itineraries across coastal, rainforest, and cultural attractions translate into higher revenue per customer

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

for rental operators.

### Rapid Uptake of Online and Mobile Booking Channels

Localiza's Fast Digital Pickup system lets customers collect cars in under five minutes, showing how users' experience and queue elimination foster conversion. Mobile commerce adoption among younger travelers creates data feedback loops, enabling dynamic pricing and fleet-allocation efficiency. As a result, companies that invest in seamless apps and contactless pick-up solutions are capturing disproportionate growth within the Brazil vehicle rental market.

### High Interest-Rate Environment Inflating Fleet CAPEX

With the SELIC benchmark at 13.25% in 2025, vehicle-loan rates range between 11.58% and 29.22%, driving higher monthly lease costs. Many operators are deferring fleet renewals, risking older average vehicle age and higher maintenance outlays. Elevated borrowing costs also raise the hurdle rate for geographic expansion, slowing penetration in low-density markets.

Other drivers and restraints analyzed in the detailed report include:

Corporate Shift Toward Fleet-Outsourcing Models  
Low-Cost Airline Expansion Spurring Fly-Drive Demand  
Stricter Vehicle-Emission Standards Raising Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

### Segment Analysis

Leisure and tourism applications delivered 58.42% of revenue in 2025, equal to the largest slice of the Brazil vehicle rental market share. Extended stays averaging 13.1 nights translate into longer contracts and higher revenue per booking. Business travel delivers consistent weekday utilization, especially around Sao Paulo's financial hubs, while the daily-commuting subsegment is forecast to grow at a 6.98% CAGR on the back of flexible-use subscriptions.

Longer leisure itineraries reinforce weekend demand peaks, helping operators lift overall fleet utilization across seasons. The commuting category benefits from urban congestion policies that deter private-car ownership, positioning subscription platforms as cost-effective alternatives. Corporate-travel demand remains stable but is increasingly met through outsourced fleet contracts rather than individual rentals, a shift that reshapes pricing and service packages within the Brazil vehicle rental market.

Online reservations held 66.05% of transactions in 2025 and are scaling at 7.09% CAGR, confirming that intuitive apps and instant confirmation are now table stakes. Offline channels maintain traction in niche scenarios such as high-touch corporate accounts and first-time foreign visitors.

Dynamic pricing algorithms enabled by real-time demand data help minimize idle inventory and safeguard yields. Conversely, offline counters at airports face staffing-cost pressures yet remain vital for ancillary-service upselling. The shift compels every operator in the Brazil vehicle rental market to invest in cybersecurity, omnichannel loyalty programs, and API connectivity with airlines and OTAs.

The Brazil Vehicle Rental Market Report is Segmented by Application Type (Leisure/Tourism, Business, and Daily Commuting), Booking Type (Online and Offline), Vehicle Type (Passenger Cars and Commercial Vehicles), End User (Tour Operators and Fleet Operators), and Region (Southeast, South, Northeast, North, and Central-West). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## List of Companies Covered in this Report:

Localiza Rent a Car S.A. Movida Participacoes Sixt SE Avis Budget Group Enterprise Holdings Europcar Mobility Group FOCO Rent a Car Turbi Fox Rent A Car Vamos Locacao VIP Cars Rentcars Unidas Frotas

## Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

## Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Boom in domestic leisure tourism post-COVID

4.2.2 Rapid uptake of online and mobile booking channels

4.2.3 Corporate shift toward fleet-outsourcing models

4.2.4 Low-cost airline expansion spurring fly-drive demand

4.2.5 Subscription/fractional ownership models gaining traction

4.2.6 Chinese OEM financing catalyzing EV fleet electrification

4.3 Market Restraints

4.3.1 High interest-rate environment inflating fleet CAPEX

4.3.2 Stricter vehicle-emission standards raising costs

4.3.3 Airport kerb-side restrictions limiting pick-ups

4.3.4 Cyber-risk on connected rental fleets inflating insurance

4.4 Value/Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitutes

4.7.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value (USD) and Volume (Units))

5.1 By Application Type

5.1.1 Leisure/Tourism

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.2 Business
- 5.1.3 Daily Commuting
- 5.2 By Booking Type
  - 5.2.1 Online
  - 5.2.2 Offline
- 5.3 By Vehicle Type
  - 5.3.1 Passenger Cars
  - 5.3.2 Commercial Vehicles
- 5.4 By End User
  - 5.4.1 Tour Operators
  - 5.4.2 Fleet Operators
- 5.5 By Region
  - 5.5.1 Southeast
  - 5.5.2 South
  - 5.5.3 Northeast
  - 5.5.4 North
  - 5.5.5 Central-West

## 6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic Information, Market Rank/Share for Key Companies, Products and Services, SWOT Analysis, and Recent Developments)
  - 6.4.1 Localiza Rent a Car S.A.
  - 6.4.2 Movida Participacoes
  - 6.4.3 Sixt SE
  - 6.4.4 Avis Budget Group
  - 6.4.5 Enterprise Holdings
  - 6.4.6 Europcar Mobility Group
  - 6.4.7 FOCO Rent a Car
  - 6.4.8 Turbi
  - 6.4.9 Fox Rent A Car
  - 6.4.10 Vamos Locacao
  - 6.4.11 VIP Cars
  - 6.4.12 Rentcars
  - 6.4.13 Unidas Frotas

## 7 Market Opportunities & Future Outlook

- 7.1 White-space & Unmet-need Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Brazil Vehicle Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-22"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

