

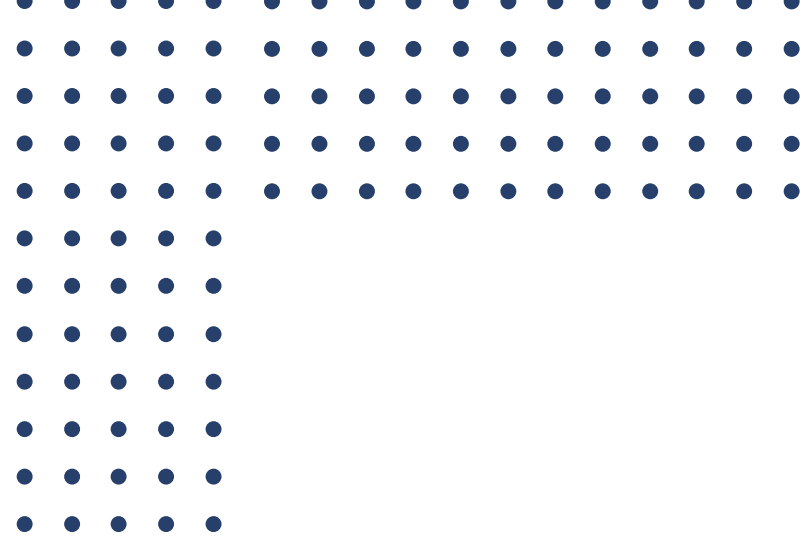


SOUTHERN AFRICAN VEHICLE RENTAL AND LEASING ASSOCIATION

The Road Ahead for Fleet & Mobility

SAVRALA Members Meeting– Thursday, 19 March 2026

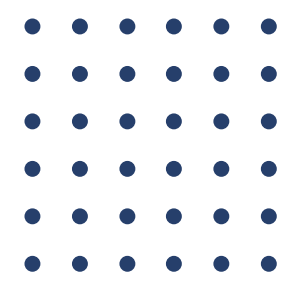
Venue | Venue: Focus Rooms, Heaton Lane, Longlake 20,
Modderfontein

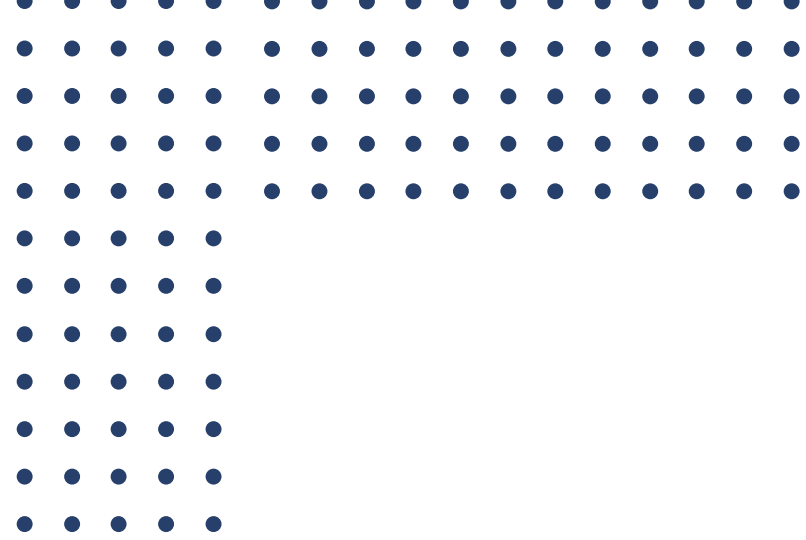


SAVRALA Competitive Notice



- Industry associations support competitiveness, but meetings must not be used for collusion.
- All activities must comply with South African competition law.
- Members must make independent business decisions without consulting competitors.
- Discussions on pricing, discounts, credit terms, rebates, profit levels, or market allocation are strictly prohibited.
- By joining SAVRALA, members acknowledge and agree to abide by these principles.

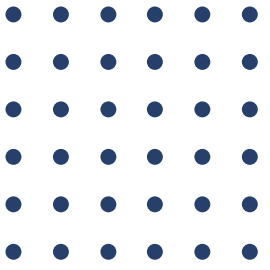


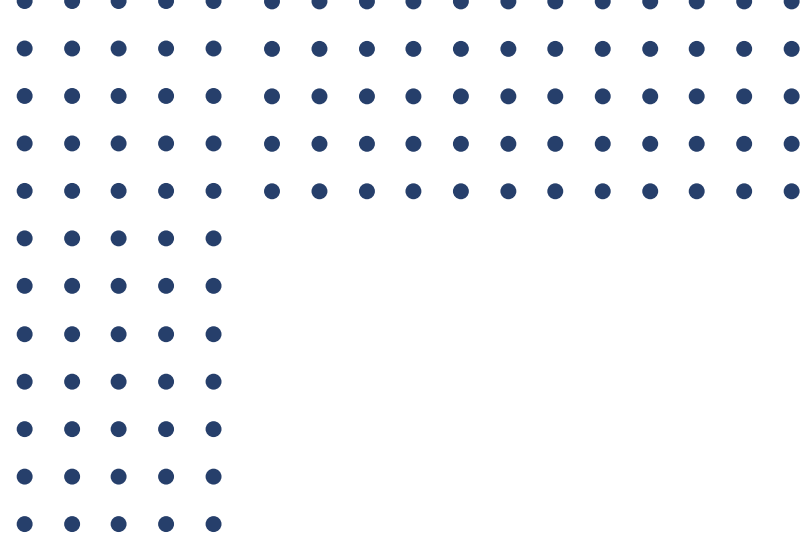


Opening Remarks



Opening Remarks



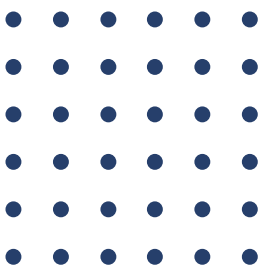


Welcome & Opening



Welcome to the 2026 SAVRALA Members Meeting

Thank you for attending



Steering Industry Standards



SAVRALA is instrumental in steering industry standards, serving to raise the professional profile of the collective industries. It continuously strive to protect both Its members' interests, and those of the public, and is therefore widely respected within corporate and government sectors.



Championing safe, efficient, and sustainable mobility through industry collaboration, best practices, and transparency



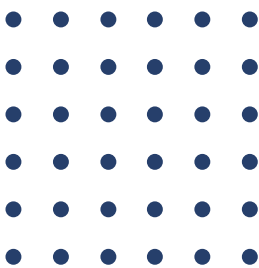
SAVRALA – Role & Mandate



SAVRALA is the collective voice of the vehicle rental and leasing industry in South Africa, promoting competitiveness, high standards, and constructive engagement with stakeholders and government.

Mandate

- Promote & protect industry interests
- Uphold service, ethics, and trading standards
- Engage constructively with stakeholders & government
- Members commit to the Constitution & Code of Conduct



AGENDA

1. Arrival, Refreshments & Registration
2. Welcome & Introductions - Overview of SAVRALA mandate
3. Confirmation of Minutes & Matters Arising
4. Strategic Priorities Update Highlights from the recent CEO's meeting
5. Overview of Industry Performance

Rental Section

Leasing Section

6. MOTY 2026 Survey Process
7. SAVRALA Projects Update
8. SAVRALA Charity Golf Day 2026 Update
9. Tea Break
10. Guest Speaker Session

Rajesh Duvooru & Greg Cress (Accenture) Topic: "Executive AI Briefing: How Artificial Intelligence is Reshaping Retail, Fleet Management, Leasing, and Mobility Finance "Includes Q&A

11. President's Remarks
12. General Announcements & Closure
13. Networking



2025/26 NATIONAL EXECUTIVE COUNCIL



PRESIDENT

Rainer Gottschick
(Motus)



RENTAL CHAIRMAN

Riaan Weideman
(Pace Group)



LEASING CHAIRMAN

Yahya Varachhia
(Wesbank)



VICE- PRESIDENT

Braam Greyling
(Hertz)



**RENTAL
VICE-CHAIRMAN**
Essa Suleman
Woodford



LEASING

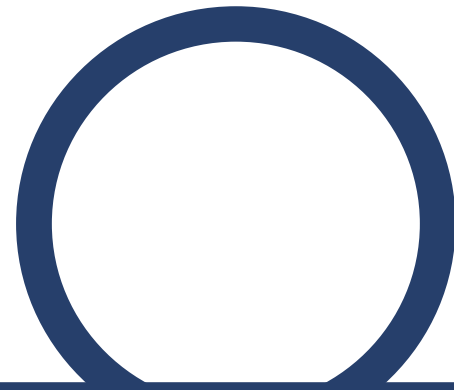
VICE -CHAIRMAN
Emile Nell
(Standard Bank)

2025/26 CO – OPTED NEC MEMBERS



RENTAL

Jody Naidoo
Bluu Car Rental



?



?



LEASING

Janet Chifetete ABSA
VMS

NB: The NEC in recent times comprised four co opted members. The NEC will consider appointing additional representatives from both the rental and leasing segment to strengthen industry balance and representation

GENERAL MANAGER



Sandile Ntseoane
(SAVRALA GM)

George Corbett
(BLUU Car Rental)

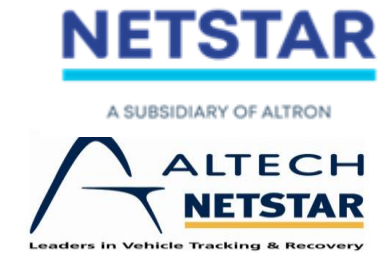
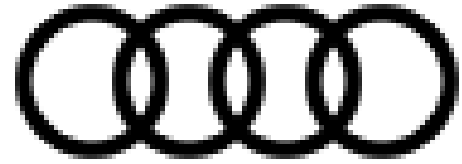
RENTAL MEMBERS

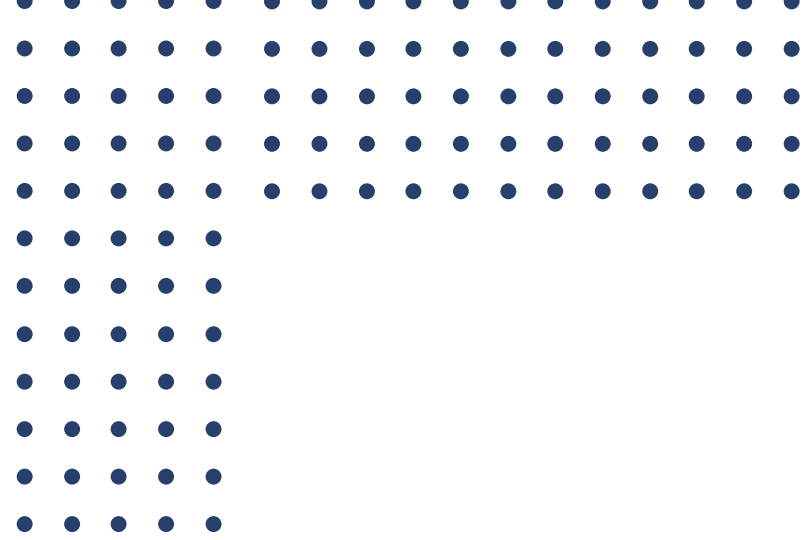


LEASING MEMBERS



ASSOCIATE MEMBERS



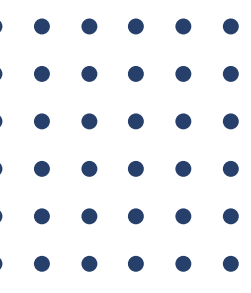


Minutes & Matters Arising



✓ Passed Matters Arising – Completed Actions

- RTIA information session dates confirmed
- MOTY Round 1 submissions completed
- Website server configuration & member access finalised



Strategic Priorities – CEO’s Meeting Highlights

CEO Meeting Takeaways

Five Headline Pillars

- Governance & Constitution Modernisation
- Advocacy & Government Relations (focus on AARTO)
- Risk, Crime & Vehicle Recovery Strategy
- Data, Insights & Compliance Excellence
- Future Mobility & Sector Competitiveness (EVs, AI, new OEMs)



Cross-Cutting and Regional Focus Areas, Execution, Accountability, and CEO Engagement

These priorities will shape industry engagement and guide SAVRALA initiatives going forward.



CONTEXT AND PURPOSE



WHY THESE PRIORITIES NOW

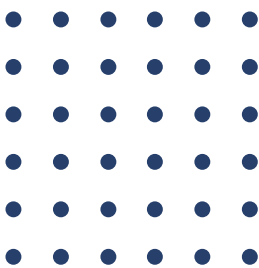
The sector faces heightened risk, tighter regulation, rapid tech change, and shifting market dynamics.

A STRONGER SAVRALA ROLE

CEOs aligned on more coordinated leadership, stronger governance, and more effective advocacy where firms can't act alone.

2026 = EXECUTION

Clear workstreams, accountability, and measurable outcomes—balancing near-term safety/compliance with longer-term mobility transformation.





GOVERNANCE & CONSTITUTION MODERNISATION



UPDATE RULES FOR FAIRNESS & CREDIBILITY

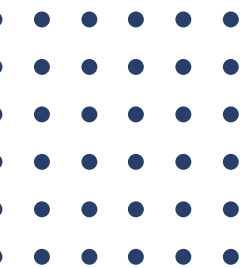
Clarify representation, voting rights, and nomination processes to strengthen transparency and trust.

EMBED DIVERSITY & TRANSFORMATION

Strengthen governance legitimacy and sustainability by designing for broader participation—beyond compliance.

ANNUAL GOVERNANCE & COMPLIANCE AUDIT

Introduce consistent standards for members to reinforce standing with regulators, partners, and the public.





ADVOCACY & GOVERNMENT RELATIONS



2026 ADVOCACY POSTURE

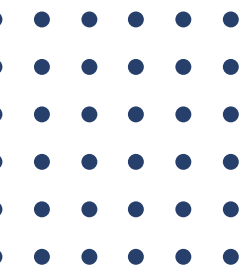
Move from passive engagement to proactive influence, driven by AARTO risk and wider transport/tourism policy shifts.

STRUCTURED ENGAGEMENT

Establish consistent touchpoints with the Department of Transport, TBCSA, TOMSA, and South African Tourism.

UNIFIED, EVIDENCE-BASED POSITION

Align mandates and messaging across members, backed by credible data, governance, and compliance-ready arguments.





RISK, CRIME & VEHICLE RECOVERY

URGENT 2026 OPERATIONAL PRIORITY

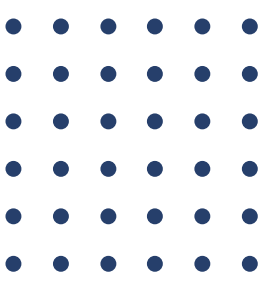
Theft, fraud, hijacking, and tourist-related incidents threaten profitability, brand trust, and customer confidence.

RECONSTITUTE AN OUTCOMES-DRIVEN RISK FORUM

Reactivate the forum, potentially supported by an external risk specialist, with sustained leadership attention and investment.

COLLECTIVE INTELLIGENCE & COORDINATED RESPONSE

Build early-warning systems, share hotspot intelligence, and manage repeat offenders via an association-wide “red list,” linked to advocacy, tourism, and law enforcement.





DATA, INSIGHTS & COMPLIANCE

WHY IT MATTERS

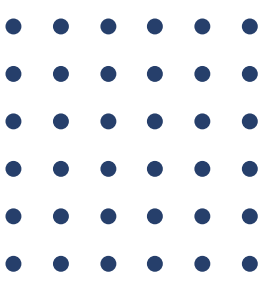
CEOs flagged inconsistent data and fragmented reporting as major barriers to advocacy, risk management, and demonstrating member value.

2026 FOCUS AREAS

Standardised templates, sector scorecards, and stronger analytics to track demand, utilisation, tourism flows, and risk exposure.

COMPLIANCE + STRATEGIC EDGE

Consistent definitions enable annual audits and help spot emerging risks early—strengthening government credibility and proving impact as mobility shifts.





FUTURE MOBILITY & COMPETITIVENESS

PREPARE FOR NEAR-TERM DISRUPTION

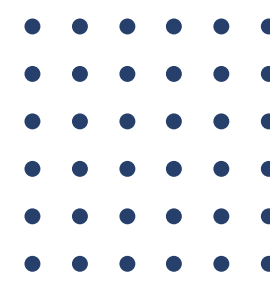
Equip members for EV readiness, practical AI adoption, and subscription mobility models—before disruption reshapes the market.

NEW OEMS, NEW RISKS

Track implications of new Chinese and other foreign entrants for fleet strategy, residual values, and supplier relationships.

SAVRALA AS FACILITATOR

Share pilots, frameworks, and best practices to reduce duplication and support faster, better investment and operating decisions.





CROSS-CUTTING & REGIONAL FOCUS

Regional inclusivity

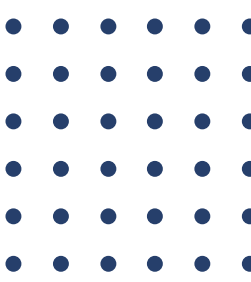
Roadshows in Western Cape and KwaZulu-Natal to strengthen engagement beyond Gauteng and ensure regional issues are represented.

Tourist safety

Self-drive risks in high-risk areas raise reputational concerns; closer coordination with tourism bodies is needed.

Leasing commitment & policy

Convene a final engagement to confirm support for leasing initiatives, alongside tax/policy work on leasing risk and incentives.





EXECUTION & CEO ACCOUNTABILITY

RHYTHM & DISCIPLINE

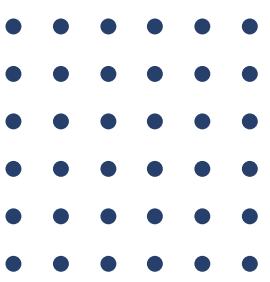
Delivery of 2026 priorities depends on stronger execution discipline, with clear timelines, defined workstream ownership, and regular monitoring.

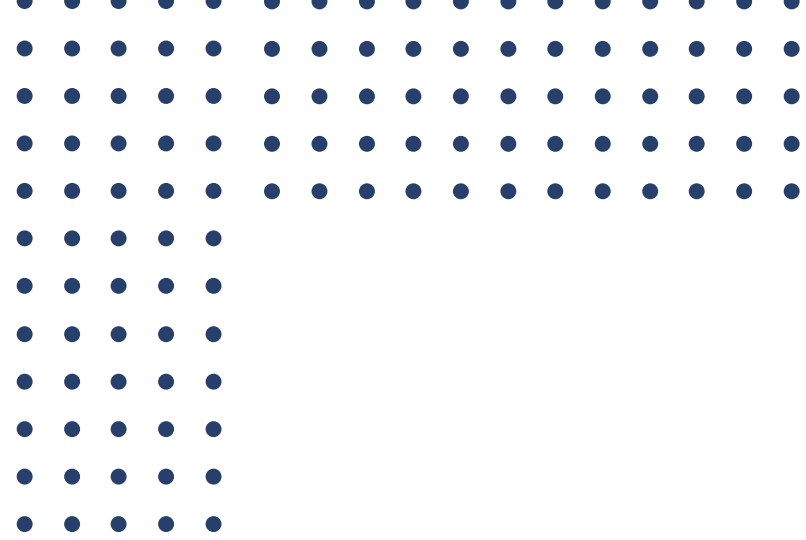
CEO CHECK-INS

Support for a second CEO meeting around September to assess progress, remove blockers, and recalibrate where needed.

ACTIVE ENGAGEMENT

High-priority forums (e.g., TMT and CANCOM) require hands-on participation—not passive endorsement—to create a tangible step-change in impact.





Industry Performance Update

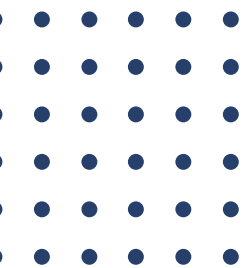


Industry Performance Overview

Rental Section: key KPIs, trends, fleet numbers

Leasing Section: key KPIs, market performance

Both highlighting major trends and challenges.



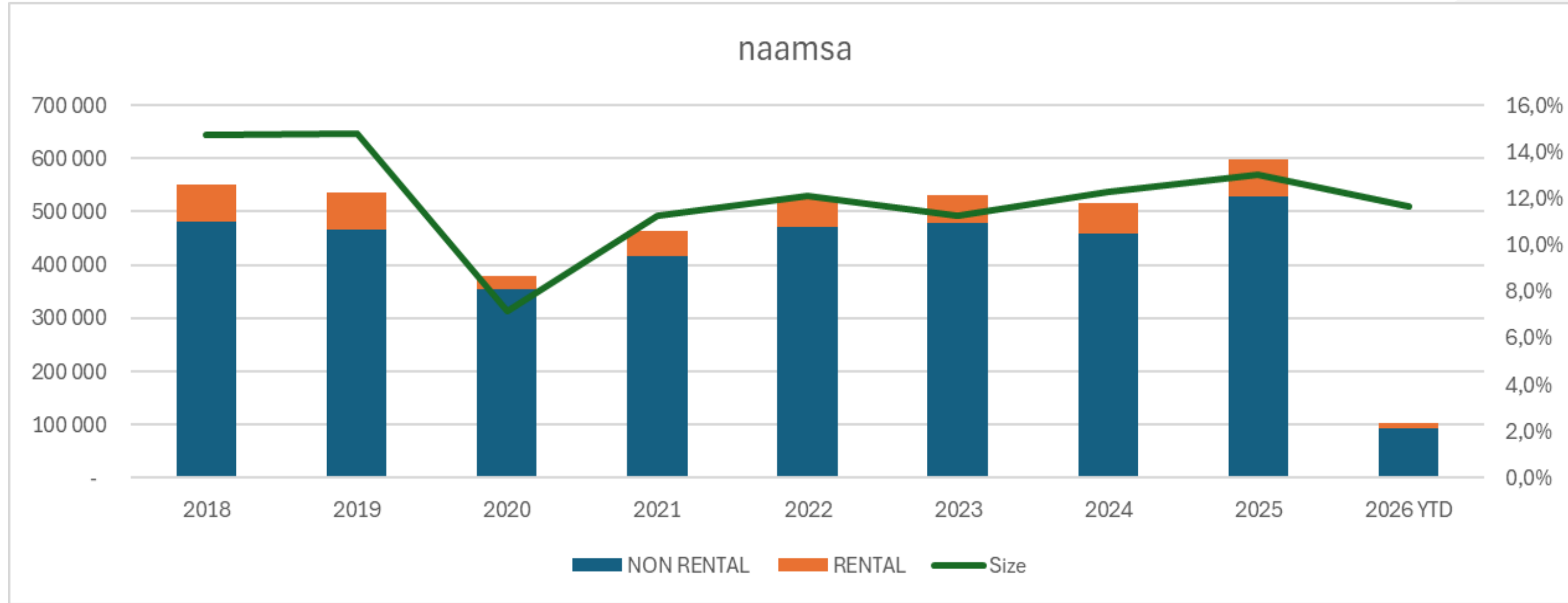
RENTAL FEEDBACK

Industry Performance Update





NAAMSA STATISTICS



| Channel | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 YTD |
|------------|---------|---------|---------|---------|---------|---------|---------|---------|----------|
| Non Rental | 481,375 | 467,342 | 354,659 | 417,286 | 472,083 | 477,843 | 459,631 | 528,433 | 93,080 |
| Rental | 70,846 | 69,144 | 25,406 | 47,036 | 57,251 | 53,704 | 56,472 | 68,905 | 10,838 |
| Total | 552,221 | 536,486 | 380,065 | 464,322 | 529,334 | 531,547 | 516,103 | 597,338 | 103,918 |
| Rental % | 14.7% | 14.8% | 7.2% | 11.3% | 12.1% | 11.2% | 12.3% | 13.0% | 11.6% |
| Growth YoY | NA | -2.8% | -29.2% | 22.2% | 14.0% | 0.4% | -2.9% | 15.7% | NA |



SAVRALA RENTAL STATISTICS

| SA Industry Revenue | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 YTD | 2025 % of Total |
|-----------------------------|------------------|------------------|------------------|------------------|------------------|-------------------|----------------|-----------------|
| Botswana | R48.05 | R59.74 | R84.53 | R92.22 | R82.12 | R102.71 | R3.69 | 1.0% |
| Eastern Province | R350.97 | R430.14 | R627.88 | R807.92 | R891.99 | R1,012.50 | R101.02 | 10.1% |
| Free State | R141.36 | R180.60 | R255.15 | R289.57 | R289.73 | R289.55 | R20.17 | 2.9% |
| Gauteng Etc | R1,465.49 | R1,869.59 | R2,717.81 | R3,379.21 | R3,662.61 | R3,887.31 | R321.41 | 38.7% |
| KwaZulu Natal | R477.34 | R670.00 | R1,061.40 | R1,203.91 | R1,286.18 | R1,429.44 | R122.16 | 14.2% |
| Namibia | R88.22 | R110.00 | R207.56 | R328.21 | R394.21 | R386.30 | R24.95 | 3.8% |
| Western Province | R886.93 | R902.39 | R1,846.31 | R2,603.81 | R2,875.73 | R2,945.40 | R380.26 | 29.3% |
| Total - Revised | R3,458.35 | R4,222.46 | R6,800.64 | R8,704.84 | R9,482.56 | R10,053.23 | R973.64 | 6.0% |
| Total - Historical | R3,458.35 | R4,222.46 | R6,702.87 | R8,069.70 | R8,419.10 | R9,652.08 | R973.64 | NA |
| Total - Difference % | 0.0% | 0.0% | 1.5% | 7.9% | 12.6% | 4.2% | 0.0% | NA |

Figures stated above are in R100 millions



SAVRALA RENTAL STATISTICS

| Industry Average Fleet | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 YTD | 2024 vs 2025 |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|
| Botswana | 384 | 296 | 352 | 459 | 414 | 509 | 442 | 22.9% |
| Eastern Province | 5,627 | 4,461 | 5,620 | 6,331 | 6,460 | 8,153 | 9,484 | 26.2% |
| Free State | 2,051 | 1,820 | 2,268 | 2,307 | 2,139 | 2,269 | 2,145 | 6.1% |
| Gauteng Etc | 23,680 | 19,812 | 23,999 | 26,899 | 27,002 | 30,989 | 32,361 | 14.8% |
| KwaZulu Natal | 7,285 | 7,231 | 8,951 | 9,050 | 9,106 | 10,765 | 11,179 | 18.2% |
| Namibia | 1,172 | 714 | 1,072 | 1,551 | 1,646 | 1,617 | 1,475 | -1.8% |
| Western Province | 16,340 | 9,119 | 15,070 | 19,638 | 20,038 | 22,923 | 30,960 | 14.4% |
| Total | 56,539 | 43,453 | 57,332 | 66,235 | 66,805 | 77,225 | 88,046 | 15.6% |

| Industry Fleet as at Jan 2026 | PAS | VAN | Total | VAN Share |
|-------------------------------|---------------|--------------|---------------|-------------|
| Botswana | 415 | 27 | 442 | 6.1% |
| Eastern Province | 8,969 | 515 | 9,484 | 5.4% |
| Free State | 2,026 | 119 | 2,145 | 5.5% |
| Gauteng Etc | 29,399 | 2,962 | 32,361 | 9.2% |
| KwaZulu Natal | 10,213 | 966 | 11,179 | 8.6% |
| Namibia | 1,395 | 80 | 1,475 | 5.4% |
| Western Province | 30,065 | 895 | 30,960 | 2.9% |
| Total | 82,482 | 5,564 | 88,046 | 6.3% |



SAVRALA RENTAL STATISTICS

| Rental Days | 2024 | 2025 | 2026 YTD | 2024 vs 2025 |
|---------------|-------------------|-------------------|------------------|--------------|
| Corporate | 4,251,165 | 5,100,218 | 393,700 | 20.0% |
| Government | 1,168,188 | 1,019,377 | 50,112 | -12.7% |
| Inbound | 3,973,809 | 4,429,668 | 607,620 | 11.5% |
| Local leisure | 4,482,727 | 6,308,707 | 740,280 | 40.7% |
| Replacement | 3,300,602 | 3,044,243 | 211,270 | -7.8% |
| Total | 17,176,491 | 19,902,213 | 2,002,982 | 15.9% |

| Revenue | 2024 | 2025 | 2026 YTD | 2024 vs 2025 |
|---------------|---------------|----------------|-------------|--------------|
| Corporate | R2,533 | R2,685 | R197 | 6.0% |
| Government | R617 | R594 | R30 | -3.8% |
| Inbound | R2,472 | R2,542 | R319 | 2.8% |
| Local leisure | R2,910 | R3,330 | R361 | 14.4% |
| Replacement | R949 | R902 | R67 | -5.0% |
| Total | R9,483 | R10,053 | R974 | 6.0% |

| RPD | 2024 | 2025 | 2026 YTD | 2024 vs 2025 |
|---------------|-------------|-------------|-------------|--------------|
| Corporate | R596 | R526 | R501 | -11.6% |
| Government | R529 | R582 | R589 | 10.2% |
| Inbound | R622 | R574 | R524 | -7.7% |
| Local leisure | R649 | R528 | R487 | -18.7% |
| Replacement | R288 | R296 | R319 | 3.0% |
| Total | R552 | R505 | R486 | -8.5% |

Figures stated are in R100 millions

LEASING FEEDBACK





LEASING
CHAIRPERSON'S UPDATE

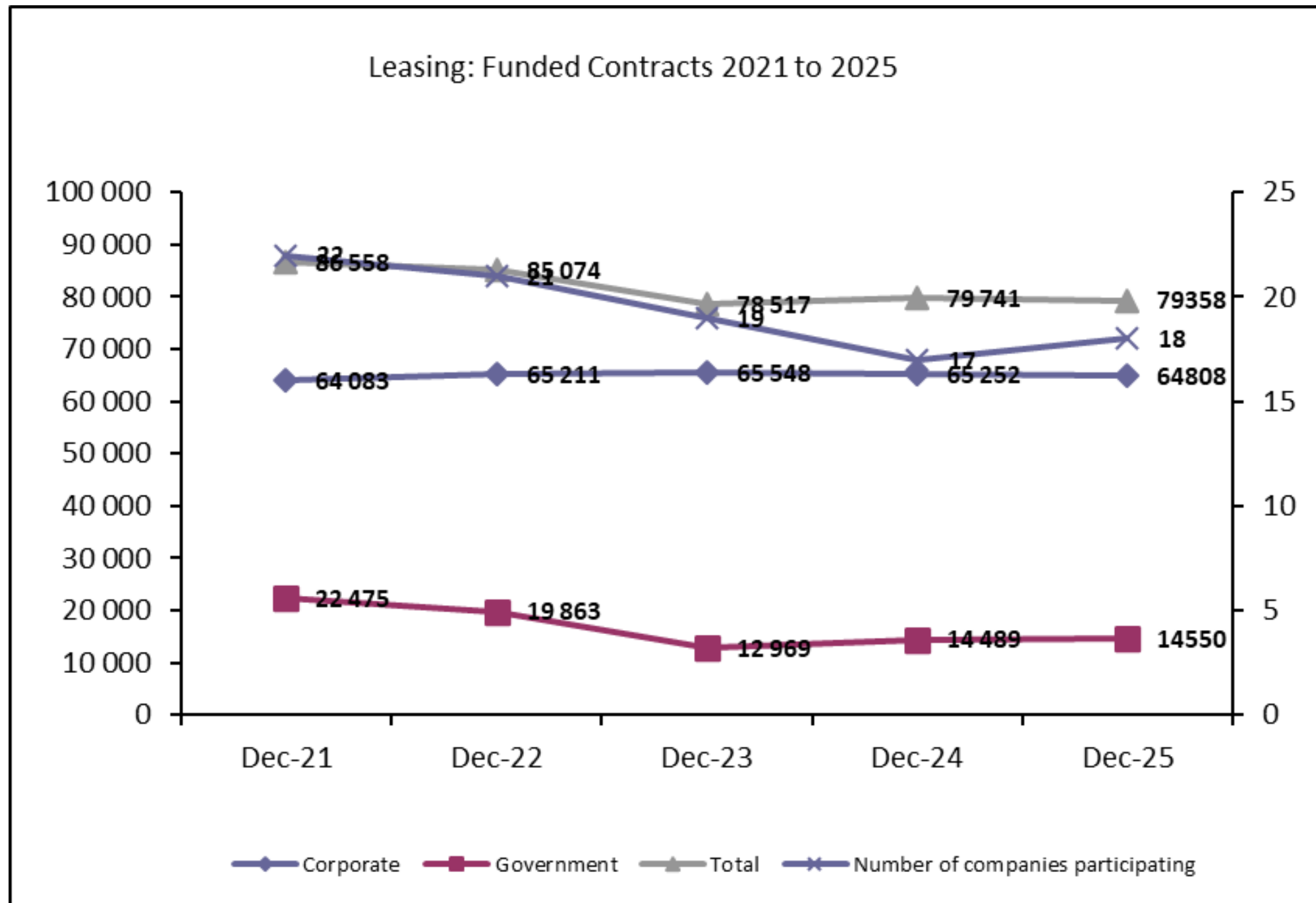
Yahya Varachhia



Q4 2025 LEASING UPDATE

MEMBERS MEETING – PORTFOLIO PERFORMANCE AND TRENDS

SAVRALA LEASING STATISTICS



| CONTRACTS AS AT DEC 2025 | | | | |
|--------------------------|--------------|--|------------------|--------------|
| | SECTORS | | PRODUCT | |
| CORPORATE | 64808 | | OPERATING RENTAL | 28262 |
| GOVERNMENT | 14550 | | FML | 51096 |
| TOTAL | 79358 | | TOTAL | 79358 |

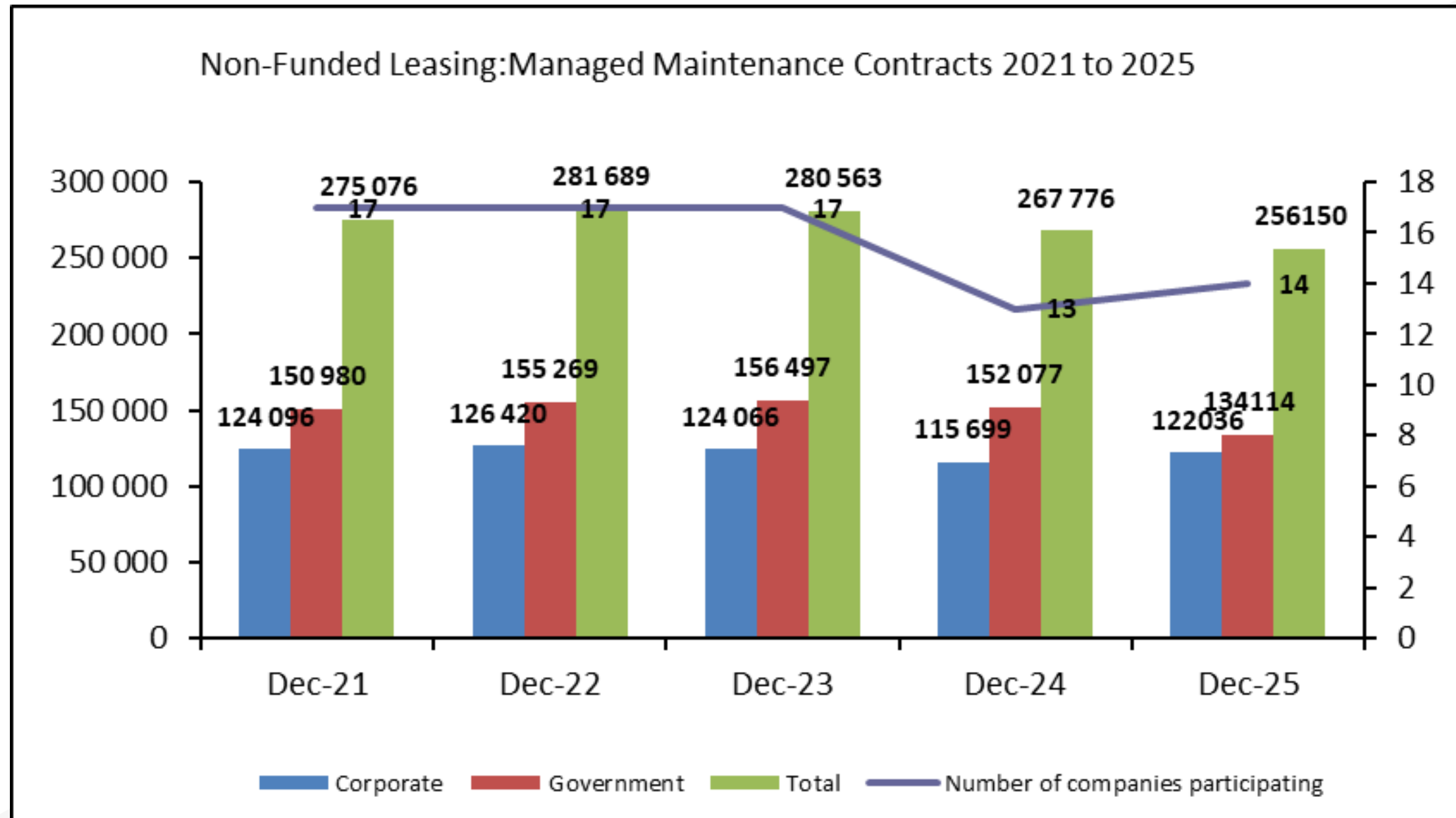
VEHICLE CATEGORY ANALYSIS

| | |
|--------------------|--------------|
| CORPORATE: | 64808 |
| PASSENGER | 58967 |
| MCV/HCV | 5841 |
| GOVERNMENT: | 14550 |
| PASSENGER | 11603 |
| MCV/HCV | 2947 |
| TOTAL | 79358 |

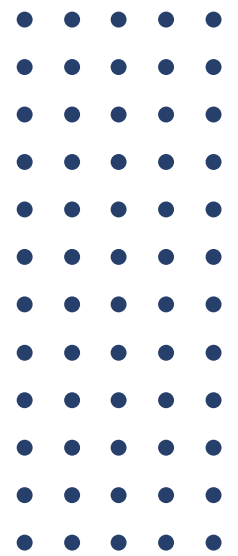
SAVRALA LEASING STATISTICS

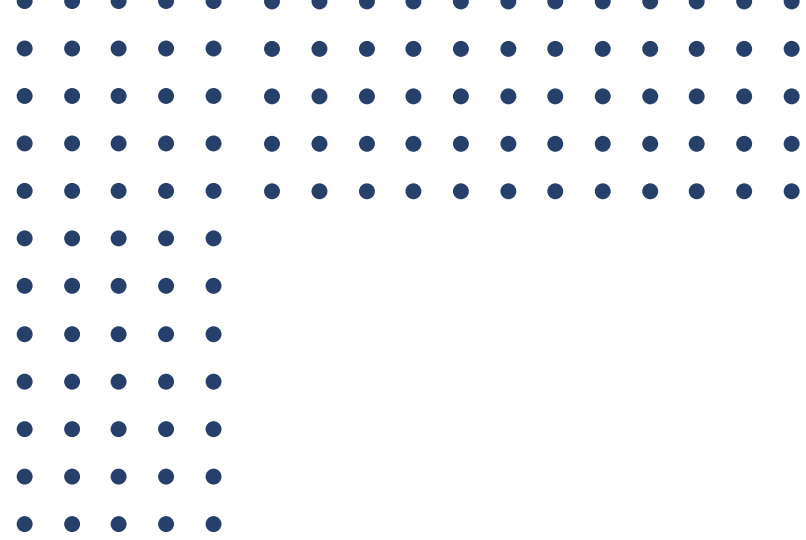


SAVRALA LEASING STATISTICS



THANK YOU

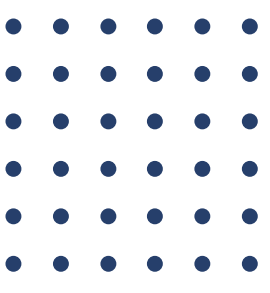




MOTY 2026 Survey



Slides presentation on behalf of Lightstone





SAVRALA MOTY

Manufacturer of the Year 2026

Lightstone

We simplify the complex

MOTY aims to:



Survey all key SAVRALA stakeholders and produce a set of results to be used to calculate the SAVRALA MOTY Award winners.



Benchmark the results of each manufacturer against its peers as well as against each Manufacturer's own historical data.



Ensure that a representative sample is achieved by reporting category.

Importance of 100% MOTY participation



Identify strengths as well as areas for improvement – highlights what works well and where service or processes can be improved



Improve service delivery – feedback should be used to refine processes, communication and response times.



Enable data-driven decisions – provides measurable insights to guide management actions.



Uncover new opportunities – feedback can reveal ideas for innovation or additional services.

- Lightstone issues first round of interviews to Rental and Leasing members on **20 March 2026**, to be submitted by latest **17 April 2026**.
- Each Rental and Leasing company submits one completed survey evaluating the OEMs whose vehicles they have in their fleets.
- The second round of interviews will be conducted during August/September.
- Results from both rounds are combined to determine the Rental, Leasing and Overall winners which are announced at the awards event on 22 October.

Summary of 2025 Results

| | <u>Rental</u> | <u>Leasing</u> | <u>Overall</u> |
|---|--|--|----------------|
|  | TOYOTA | TOYOTA | TOYOTA |
|  | HYUNDAI | HYUNDAI | HYUNDAI |
|  | KIA | KIA | KIA |
|  | Sarah Burkey (Suzuki) Lufuno Nephawe (Toyota) | Geraldine Pillay (GWM) Ashley Kistiah (Volkswagen) Lufuno Nephawe (Toyota) | - |

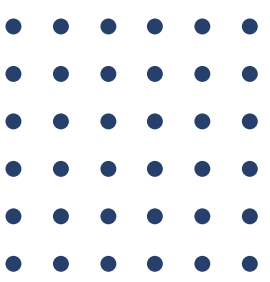
Next steps

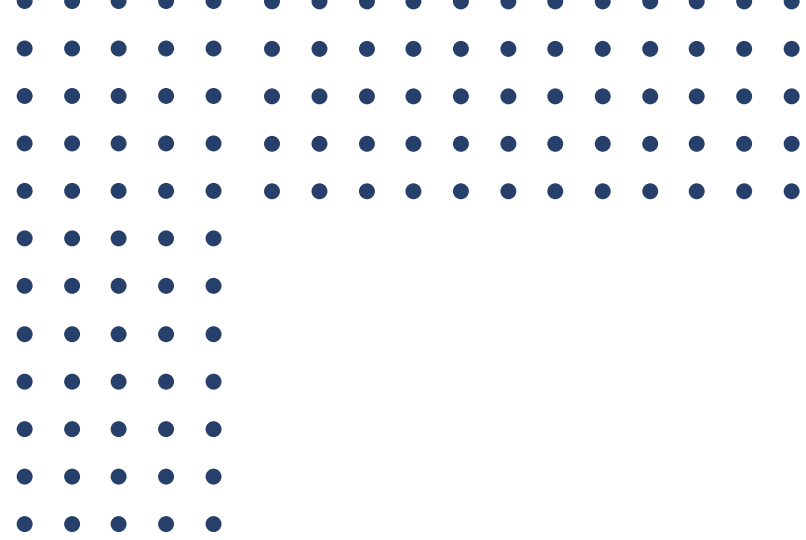
- Please check your inbox for emails with subject line:
PLEASE COMPLETE THE SAVRALA MOTY 2026 SURVEY FOR ROUND 1
- Reminder emails will be issued weekly to remind you to please submit your survey on time.
- Involve all the relevant people within your organisation who can answer the various sections of the survey.
- Deadline for Round 1 submissions is **17 April 2026.**



SAVRALA Projects & Initiatives Update

SAVRALA Projects & Industry Progress Update





SAVRALA Impact Summary

Industry Data: Monthly reporting framework in place

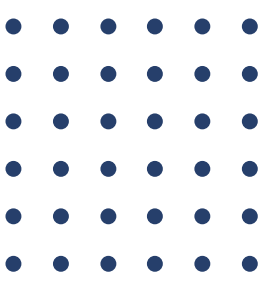
Market Intelligence: Stronger analytics via Lightstone partnership

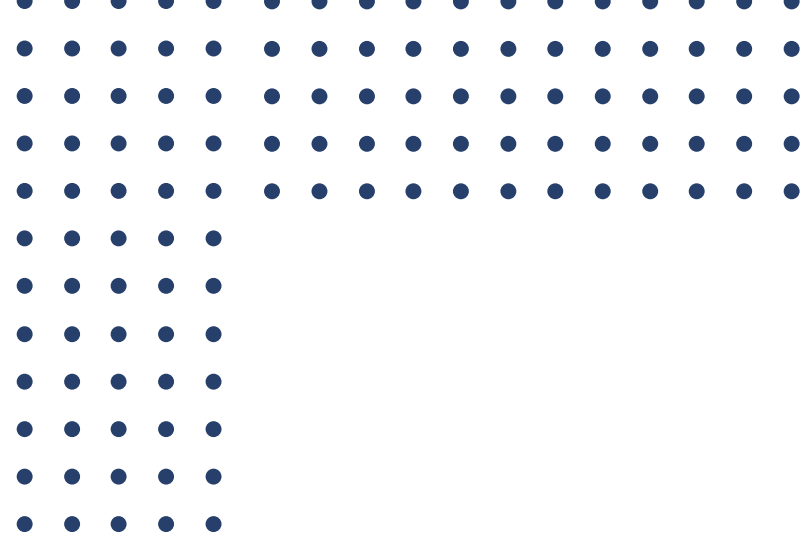
Industry Standards: MOTY framework modernised

Representation: Active engagement with mobility and infrastructure stakeholders

Member Collaboration: Growing participation in reporting and initiatives

Building a stronger rental and leasing sector through credible data, effective advocacy, and operational excellence.

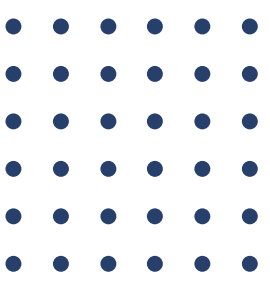


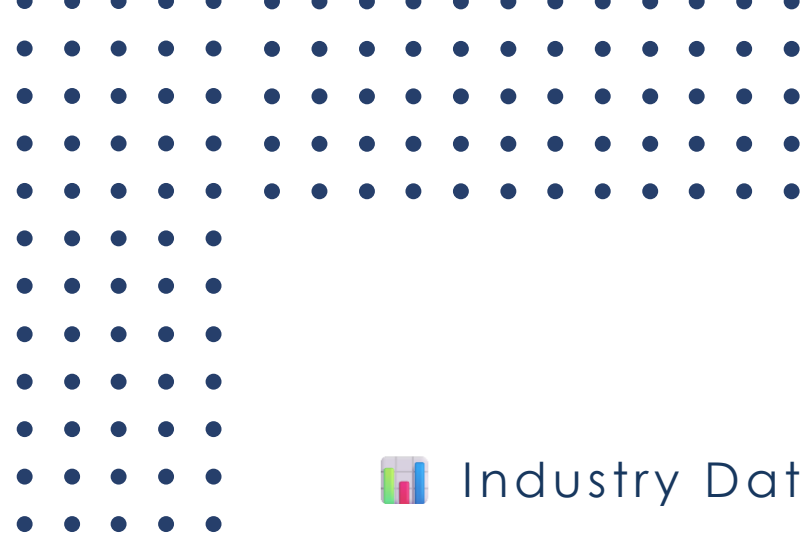


2025–2026 Industry Roadmap



- Expand industry data reporting and automation
- Develop enhanced industry insight reports for members
- Strengthen advocacy in mobility infrastructure and policy discussions
- Grow membership and expand industry representation





SAVRALA Impact Snapshot



Industry Data & Insights

New monthly industry data reporting framework implemented

Market Intelligence

Improved industry analytics through collaboration with Lightstone

Industry Standards

Manufacturer of the Year (MOTY) framework review completed

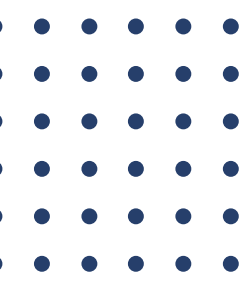
Industry Representation

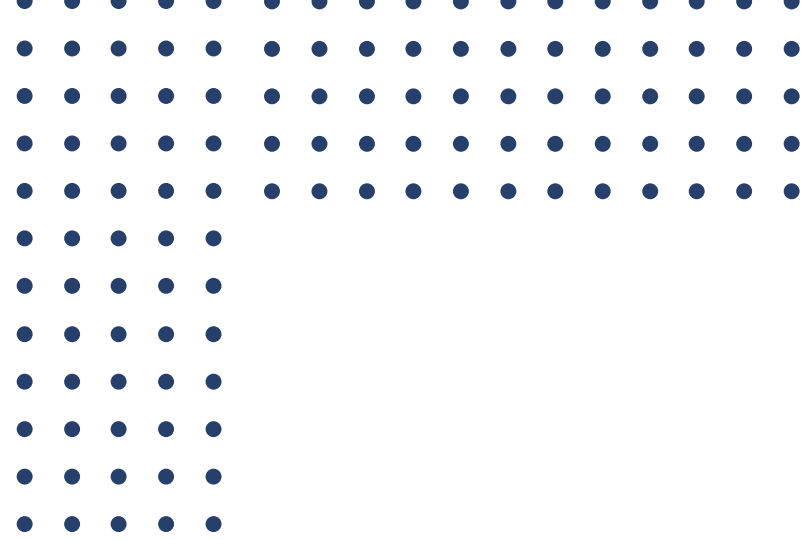
Active engagement with key mobility and infrastructure stakeholders

Member Collaboration

Strengthened industry participation in SAVRALA reporting and initiatives

Strengthening the rental and leasing industry through better data, stronger representation and higher operational standards.



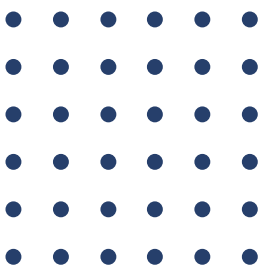


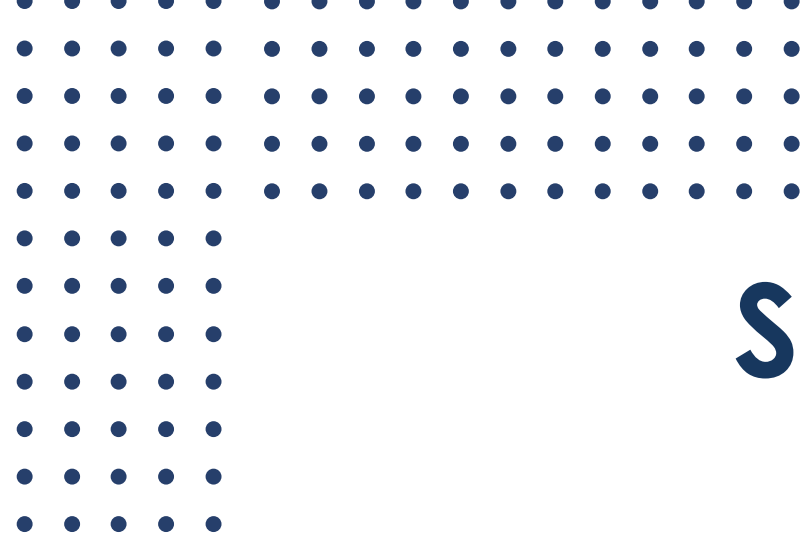
Refreshments & Networking



Tea Break

Please return promptly for the Guest Speaker

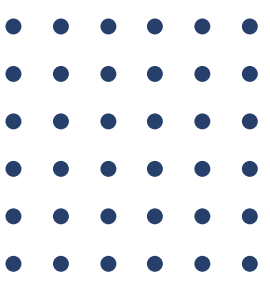


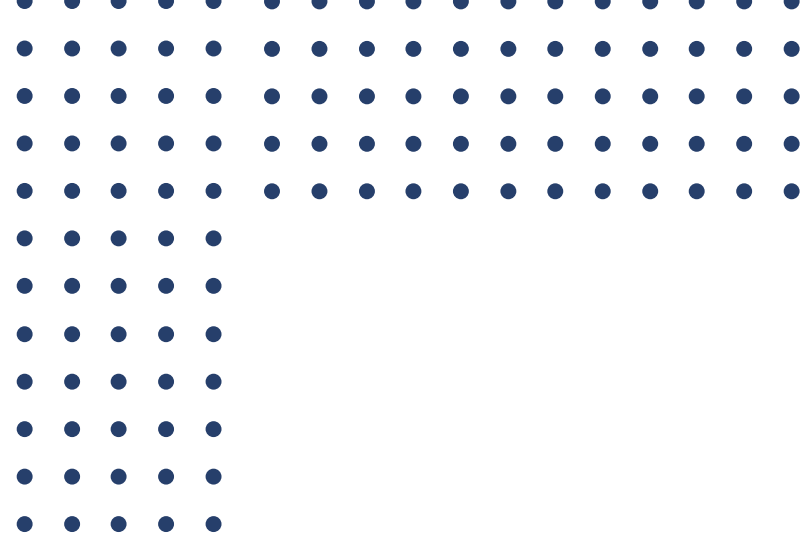


Special Guest Speakers Introduction

Rajesh Duvooru & Greg Cress (Accenture)

Title: "Executive AI Briefing: How AI is Reshaping Retail, Fleet Management, Leasing, and Mobility Finance"





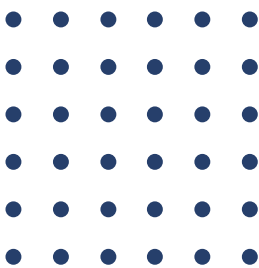
AI Executive Briefing

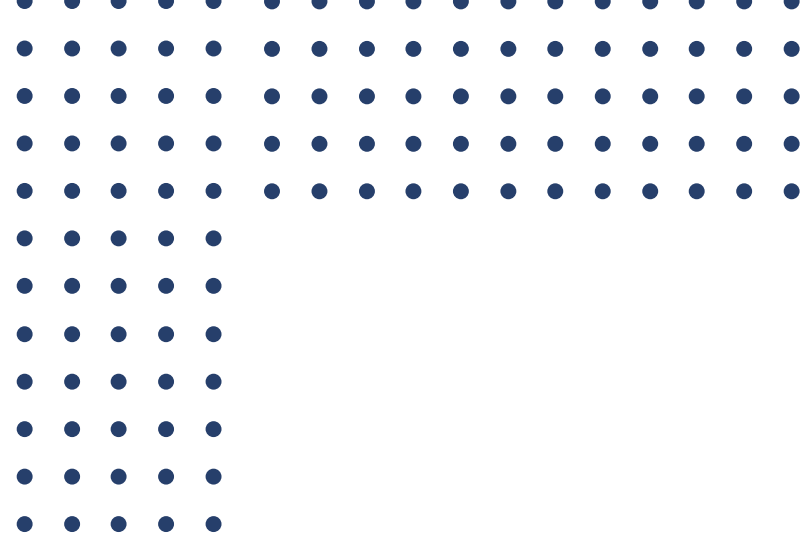


Key trends in AI for retail, fleet, leasing, mobility finance

Global / emerging market examples

Executive takeaways & strategic insights



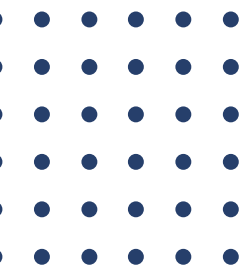


Remarks from the President



President's Remarks

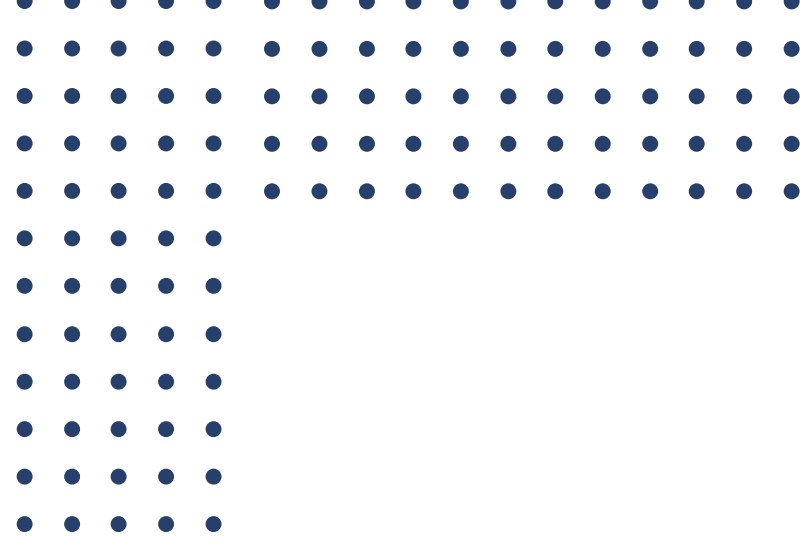
Key strategic points / vision for members / Call to action if relevant





ANNOUNCEMENTS



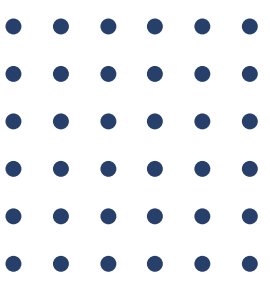


Announcements & Updates



General Announcements

- Upcoming events (Charity Golf Day, AGM, MOTY Awards)
- Charity Golf Day – 19th August 2026
- MOTY Survey Round 1 resumes on the 20th of March 2026 – 17th April 2026
- MOTY Awards Moved to accommodate SA Auto Week 2026
- Update Your SAVRALA Member Distribution List - To strengthen communication and ensure that the appropriate individuals within each member organization receive timely information, SAVRALA is updating its distribution lists for meetings, events, and general communications.



SAVRALA CHARITY GOLF DAY

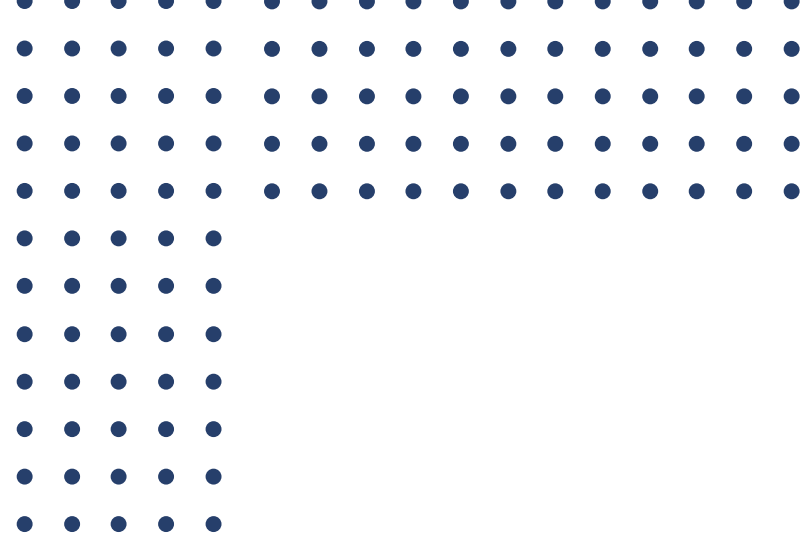


19 AUGUST 2026
Venue: TBC

31st MOTY AWARDS

22 OCTOBER 2026

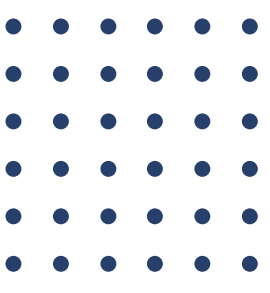
Venue TBC

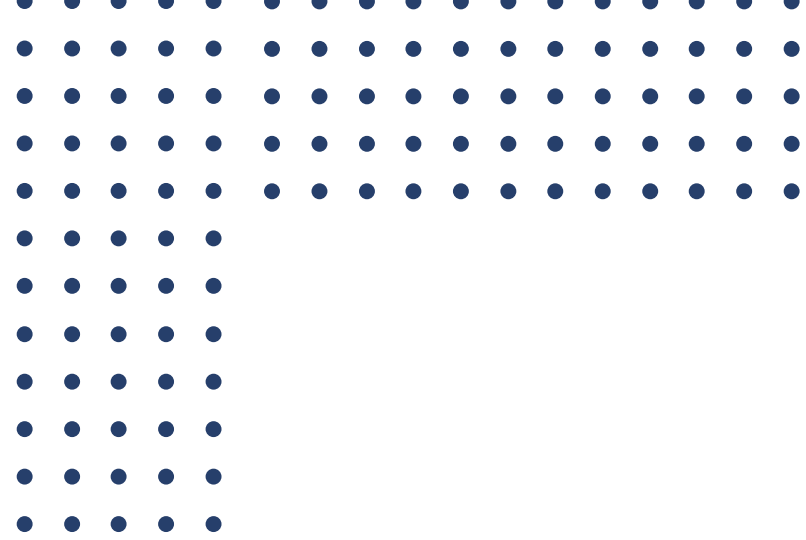


Thank You & Meeting Closure



Closing remarks

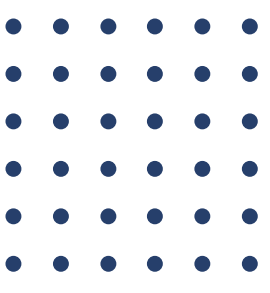




Networking Opportunity



Networking / Informal Session



THANK YOU

