

#### Q2-2020 MARKET ESTIMATE

**BVRLA Business fleet leasing**  
Year-on-year change  
**1,479,642**

1,061,388  
-8.1%

418,254  
+1.6%



#### Q2-2020 MARKET TRENDS

**All BVRLA car leasing down 5%**  
This year-on-year change comprised:

**+5.7%**  
Personal contracts

**-9.7%**  
Business contract hire

**-7.2%**  
Salary sacrifice



#### AVERAGE EMISSIONS BVRLA CAR FLEET

Whole fleet Q2 2020 New registrations

**111.3 g/km**

**107 g/km**



#### AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS

BVRLA fleet Q2 2020

**107 g/km**

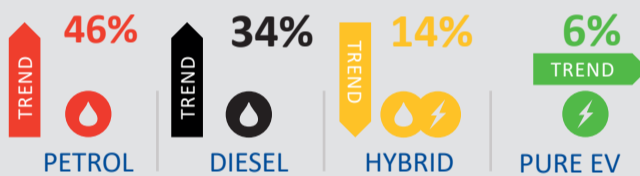
UK fleet

**115 g/km**



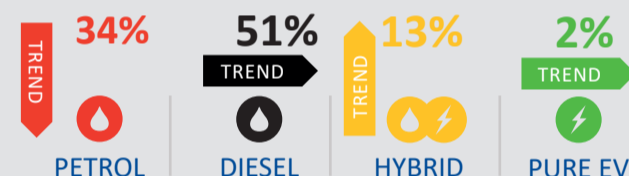
#### FUEL TYPE

##### BVRLA fleet new car registrations



#### FUEL TYPE

##### BVRLA total car fleet



#### CO2 EMISSION COMPARISON

NEW BCH Q2 2020

**96 g/km**

NEW PCH

**130 g/km**



#### BUSINESS CONFIDENCE

Q2 - 2020 Confidence in the UK economy remains low and confidence in the fleet leasing sector deteriorated further – both at their lowest since 2013. Members were more positive about fleet sizes.



#### CAR & LCV MAINTENANCE



**Contracts with maintenance**  
Trend is down

66%

54%



#### CAR & LCV REGULATED CONTRACTS



**Business & Personal Contracts**  
Trend is level

28%

11%

#### New methodology for BVRLA Quarterly Leasing Survey

The methodology used in the Leasing Survey has changed from that used in previous quarters which used a sample group of members surveyed quarterly and applied a multiplier to the figure to provide an approximate assessment of overall volumes and trends.

From Q4 2019, a new fleet measure has been adopted which also makes use of data from all members who have participated in the annual BVRLA census over the preceding three years. We have selected this group for the simple reason it allows us to analyse real trends without the effects of members joining and leaving. Our new reporting group represents 72% of the overall BVRLA lease fleet, or 95% if the Motability fleet is excluded.

#### Established in 1967, the British Vehicle Rental & Leasing Association (BVRLA) is the UK trade body for companies engaged in vehicle rental and leasing.

Its 1000+ members operate a combined fleet of over 5 million cars, vans and trucks. BVRLA members buy nearly half of all new vehicles sold in the UK, supporting around 465,000 jobs and contributing nearly £49bn to the economy each year. By consulting with government and maintaining industry standards, the BVRLA helps its members deliver safe, sustainable and affordable road transport to millions of consumers and businesses.

The purpose of this survey is to provide a general market overview only. Although every effort is made to ensure that the content is accurate, the BVRLA cannot accept any liability whatsoever for any inaccuracy contained within it, nor for any damage or loss, direct or indirect, which may be suffered as a result of any reliance placed upon the contents provided, whether arising in contract, tort or in any other way. Advice should always be obtained from your own professional advisers before committing to a specific action.