

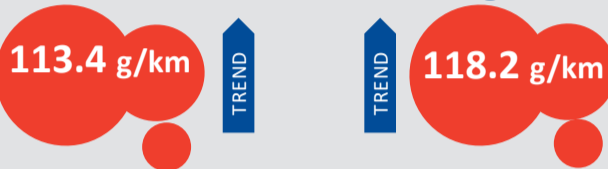
#### Q1-2019 MARKET ESTIMATE

**BVRLA Business fleet leasing**  
Year-on-year change  
**1,249,000 (-6.0%)**



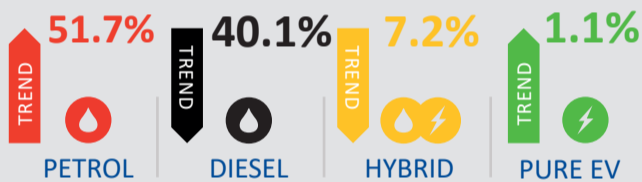
#### AVERAGE EMISSIONS BVRLA CAR FLEET

Whole fleet Q1 2019 New registrations



#### FUEL TYPE

**BVRLA fleet new car registrations**



#### CO2 EMISSION COMPARISON

B CH Q1 2019 PCH



**66% of car fleets are Euro 6 compliant\***  
(\*small sample)

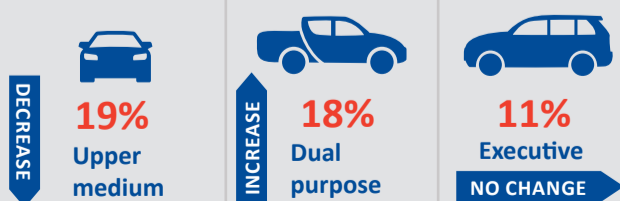


#### CAR & LCV CONTRACT DURATION

**Mean contract duration**  
No noticeable year-on-year change



#### MARKET SHARE BY VEHICLE TYPE\*



\*MVRIS Motor Vehicle Registration Information System.



#### Q1-2019 MARKET TRENDS

**All BVRLA car leasing down 4%**  
This yr-on-yr growth comprised:

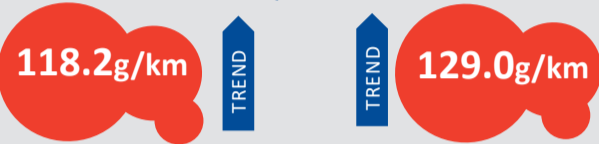


\* includes HP, Contract purchase, PCP, ECOS & salary sacrifice



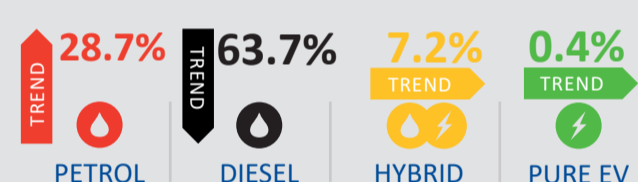
#### AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS

BVRLA fleet Q1 2019 UK fleet



#### FUEL TYPE

**BVRLA total car fleet**



#### BUSINESS CONFIDENCE

Q4 - Q1 2018 - 2019 BVRLA members have been progressively less pessimistic about the economy over the last two quarters. Confidence in the fleet leasing sector remains negative - but has not significantly reduced since Q2 2016. Members confidence in the outlook for fleet sizes continues to diminish.



#### CAR & LCV CONTRACT MILEAGE

**Mean contract mileage**  
7/10 contracts are under 20,000 miles per annum



Established in 1967, the [British Vehicle Rental & Leasing Association \(BVRLA\)](http://www.bvrla.co.uk) is the UK trade body for companies engaged in vehicle rental and leasing. Its 980+ 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 317,000 jobs and contributing nearly £25bn 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.

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