



Q4-2018 MARKET ESTIMATE

BVRLA Business fleet leasing
Year-on-year change
1,254,000 (-6.7%)



Q4-2018 MARKET TRENDS

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



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



AVERAGE EMISSIONS BVRLA CAR FLEET

Whole fleet Q4 2018 New registrations



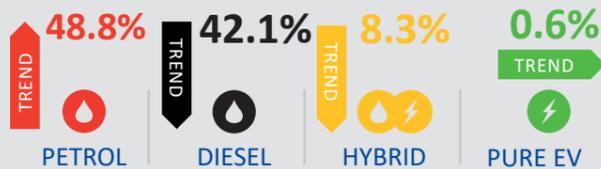
AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS

BVRLA fleet Q4 2018 UK fleet



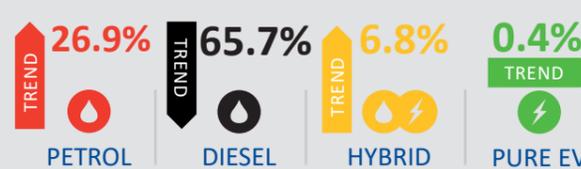
FUEL TYPE

BVRLA fleet new car registrations



FUEL TYPE

BVRLA total car fleet



CO2 EMISSION COMPARISON

B CH Q4 2018 PCH



87% of car fleets are Euro 6 compliant



BUSINESS CONFIDENCE

Q3 - Q4 2018 Confidence in the UK economy among the business community is at its lowest since Q2 2016, the first confidence measure following the Brexit referendum. Members confidence in the outlook over the next six months for used car values became positive for the first time since Q4 2013.



CAR & LCV CONTRACT DURATION

Mean contract duration
No noticeable year-on-year change

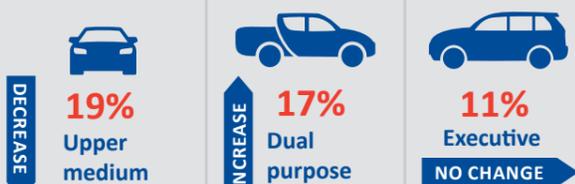


CAR & LCV CONTRACT MILEAGE

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



MARKET SHARE BY VEHICLE TYPE*



*MVRIS Motor Vehicle Registration Information System.

Established in 1967, the **British Vehicle Rental & Leasing Association (BVRLA)** 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.