



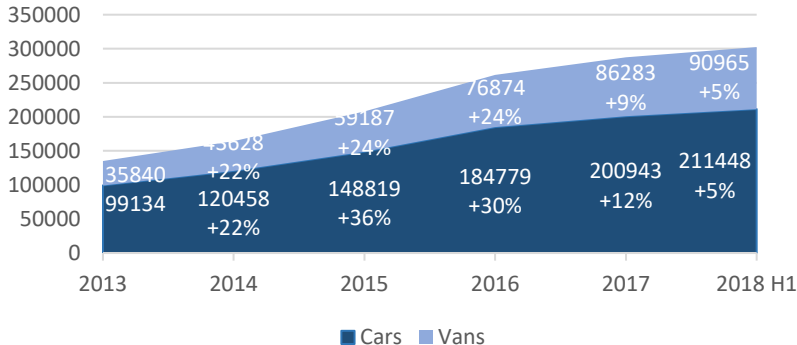
August 2018

LEASING BROKER / SMALL FLEET 2018 H1

The rate of growth continues to fall. Down to 5% in H1 2018 from 10% in 2017.

Key Findings (Cars)	Vans
<ul style="list-style-type: none"> PCH is beginning to dominate the sector. 55% of contracts are PCH compared to 26% of contracts in 2013. 61% of new contracts in H1 2018 were PCH. Business contract hire represents 40% of cars on fleet down from 64% in 2013. 35% of new contracts in H1 2018 were business contract hire 	<ul style="list-style-type: none"> Market share by product type is stable in the van sector Business contract hire dominates with 61% 69% of new contracts in the van sector were business contract hire up from 62% in 2013 and 68% last year. Finance lease has 32% share and the recent decline appears to have stabilised.

Vehicles on fleet



302413 vehicles on fleet

211448 cars

90965 vans

45855 new contracts

36514 cars

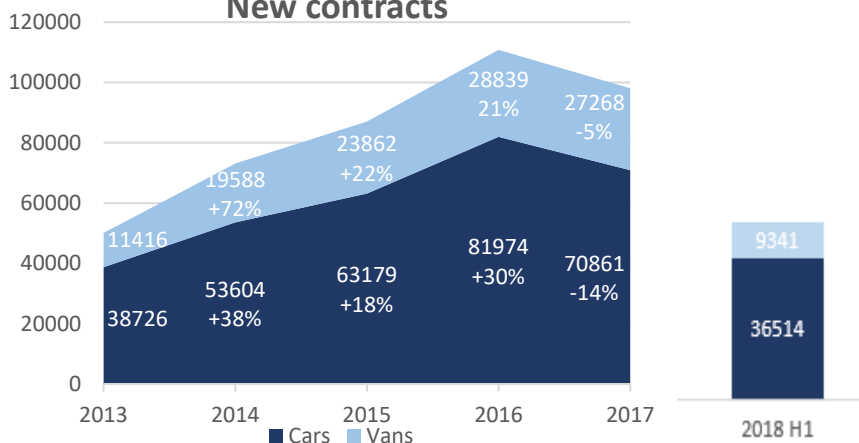
9341 vans

15187 net additions

10505 cars

4682 vans

New contracts

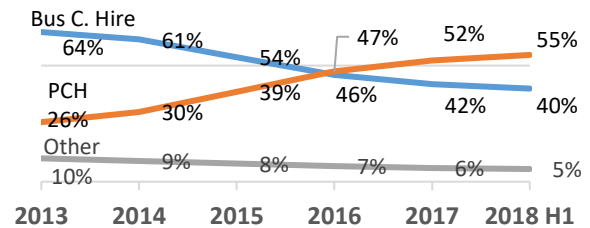


Leasing Broker / Small Fleet Survey

CARS: TOTAL ON CONTRACT

	2013	2014	2015	2016	2017	2018 H1
Bus C Hire	63803	73683	79709	84841	84388	84662
PCH	25381	36111	57572	87619	104828	115267
HP/PCP	5628	5877	6452	6779	6501	6503
Fin Lease	3755	4183	4445	4863	4616	4438
C Purch,	372	393	452	505	474	446
Lease Purch			125	105	72	68
Credit Hire	195	211	64	67	64	64
Total	99134	120458	148819	184779	200943	211448

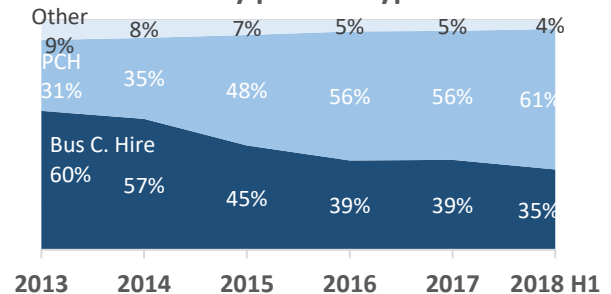
Cars: Total on Contract MKT Share by Product Type



CARS: NEW CONTRACTS

	2013	2014	2015	2016	2017	2018 H1
PCH	11948	18898	30363	46121	39740	22315
Bus C Hire	23403	30562	28706	31808	27761	12757
HP/PCP	2031	2214	2303	2279	2035	928
Fin Lease	1162	1706	1585	1489	1198	442
C Purch,	113	139	167	229	96	46
Lease Purch	53	62	30	29	12	10
Credit Hire	16	23	25	19	19	16
Total	38726	53604	63179	81974	70861	36514

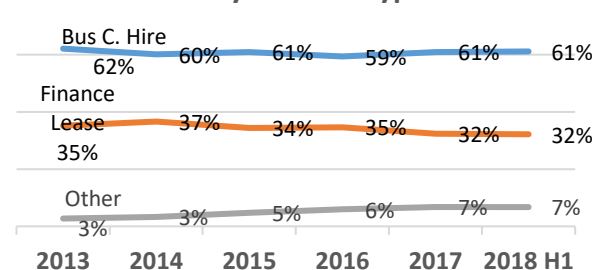
Mkt Share by product type



LCV: TOTAL ON CONTRACT

	2013	2014	2015	2016	2017	2018 H1
Bus C Hire	22269	26219	36030	45653	52603	55576
Fin Lease	12593	15981	20367	26643	27901	29277
C Purch	145	280	792	1264	1466	1486
HP/PCP	45	26	18	16	11	3
Lease Purch	664	819	1116	1345	1367	1378
PCH	124	303	864	1953	2935	3245
Total	35840	43628	59187	76874	86283	90965

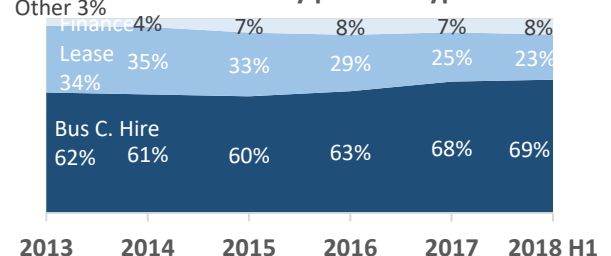
MKT Share by Product Type



LCV: NEW CONTRACTS

	2013	2014	2015	2016	2017	2018 H1
Bus C Hire	7102	11992	14366	18131	18488	6425
Fin Lease	3929	6827	7817	8383	6921	2176
C Purch	53	173	563	551	353	183
HP/PCP	14	14	29	3	0	0
Lease Purch	235	381	479	444	329	150
PCH	83	201	608	1327	1177	407
Total	11416	19588	23862	28839	27268	9341

Market Share by product type



The purpose of this research is for information only and is not intended to address the circumstances of any particular individual or company. Although every effort is made to ensure that the content is accurate, 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 information provided, whether arising in contract, tort or in any other way. All rights, including copyright and database right in the material contained in the research and its contents are owned by BVRLA, licensed by third parties for use by BVRLA or otherwise used by BVRLA as permitted by applicable law. Materials in this research may not be copied, reproduced, republished, downloaded, posted, broadcast or transmitted in any way, or except as otherwise expressly permitted. All commercial use enquiries for BVRLA materials should be directed to info@bvrla.co.uk