

#### Q2-2019 MARKET ESTIMATE

**BVRLA Business fleet leasing**  
Year-on-year change  
**1,230,000 (-5.5%)**

832,000  
-9.3%

398,000  
+3.3%



#### Q2-2019 MARKET TRENDS

**All BVRLA car leasing down 2%**  
This yr-on-yr growth comprised:

**+23%**  
Personal contracts

**-9%**  
Business fleet leasing

**-11%**  
Other\*

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



#### AVERAGE EMISSIONS BVRLA CAR FLEET

Whole fleet Q2 2019 New registrations

**112.1 g/km**

**118.5 g/km**



#### AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS

BVRLA fleet Q2 2019

**118.5g/km**

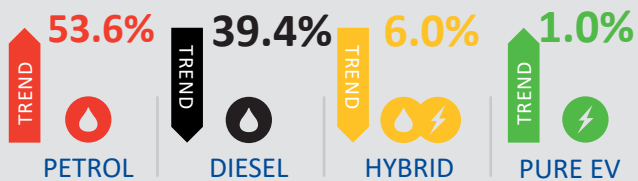
UK fleet

**129.7g/km**



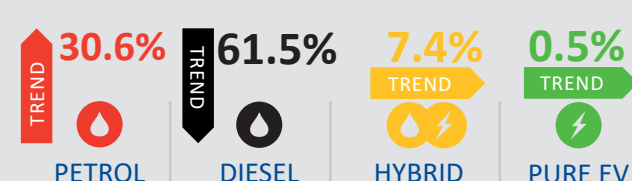
#### FUEL TYPE

##### BVRLA fleet new car registrations



#### FUEL TYPE

##### BVRLA total car fleet



#### CO2 EMISSION COMPARISON

BCH

Q2 2019

PCH

**108.0 g/km**

**129.0 g/km**



#### BUSINESS CONFIDENCE

Q1 - Q2 2019



Confidence in the UK economy is negative and recent improvements in confidence have reversed. This is consistent with findings by the CBI among all businesses in the UK. Confidence in the fleet leasing sector remains slightly negative but largely unchanged since Q2 2016. Confidence in the outlook for fleet sizes recovered after two quarters of decline.



#### CAR & LCV CONTRACT DURATION



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

39 MONTHS

46 MONTHS



#### CAR & LCV CONTRACT MILEAGE



**Mean contract mileage**

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

13,500 MILES

16,500 MILES



#### MARKET SHARE BY VEHICLE TYPE\*

**19%**  
Upper medium  
NO CHANGE

**18%**  
Dual purpose  
NO CHANGE

**11%**  
Executive  
NO CHANGE

\*MVRIS Motor Vehicle Registration Information System.

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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