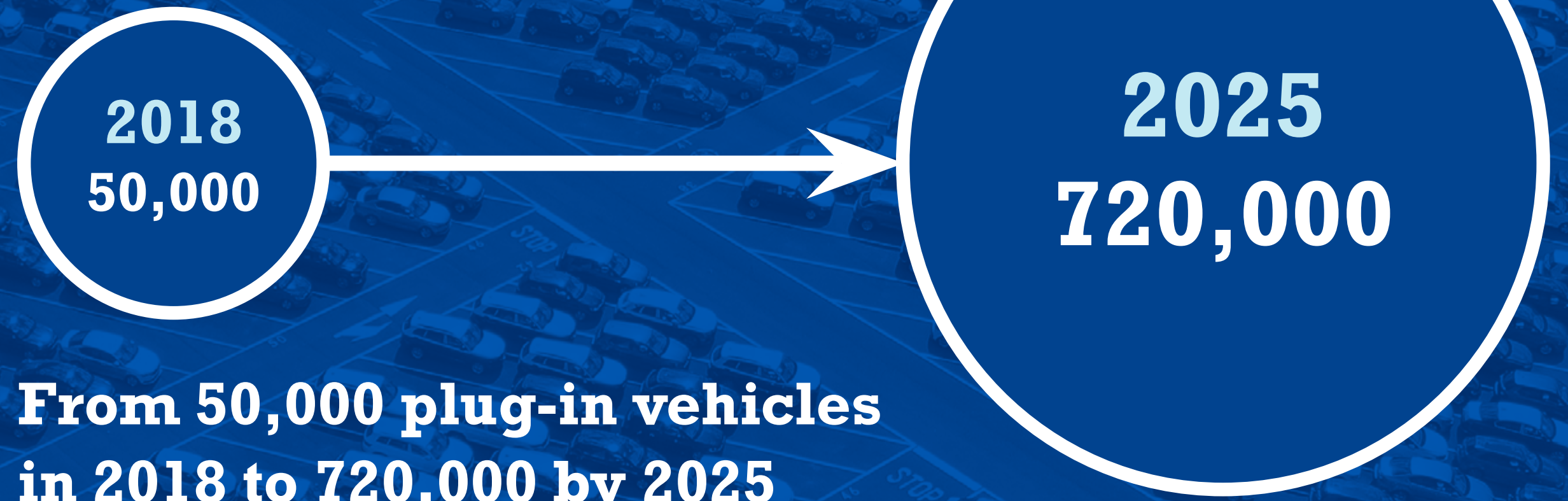




Plug-in Pledge 2020

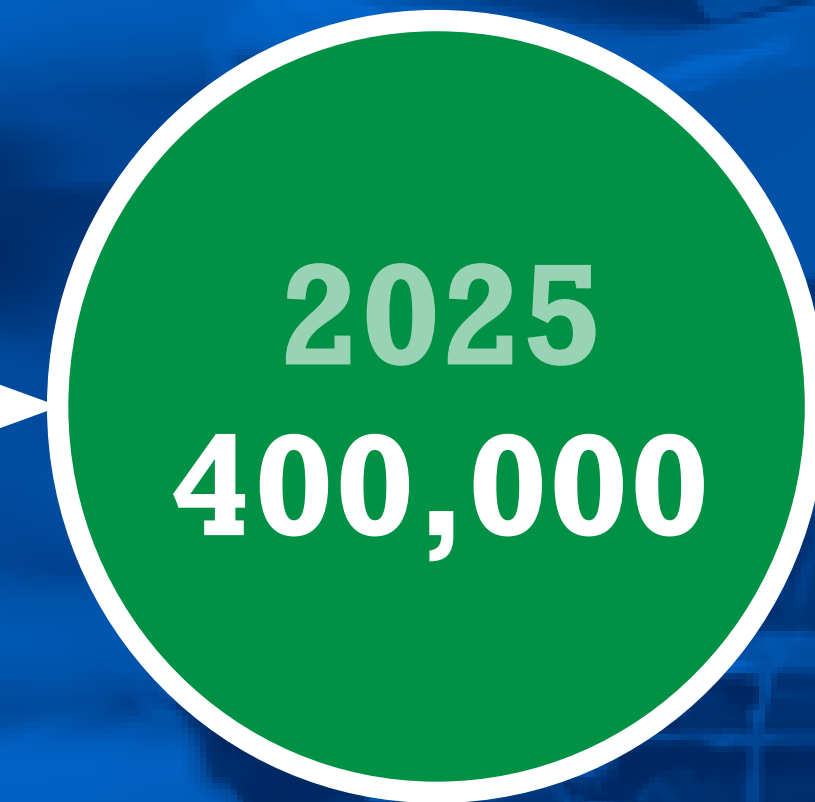
2018: Our first Plug-in Pledge

- In July 2018, the BVRLA launched its first 'Plug-in Pledge'. It said that the vehicle rental, leasing and fleet industry's combined battery electric and plug-in hybrid vehicle fleet size would jump from 50,000 to 720,000 by 2025.
- By that time, the vehicle rental, leasing and fleet sector would be buying 300,000 plug-in vehicles per year.

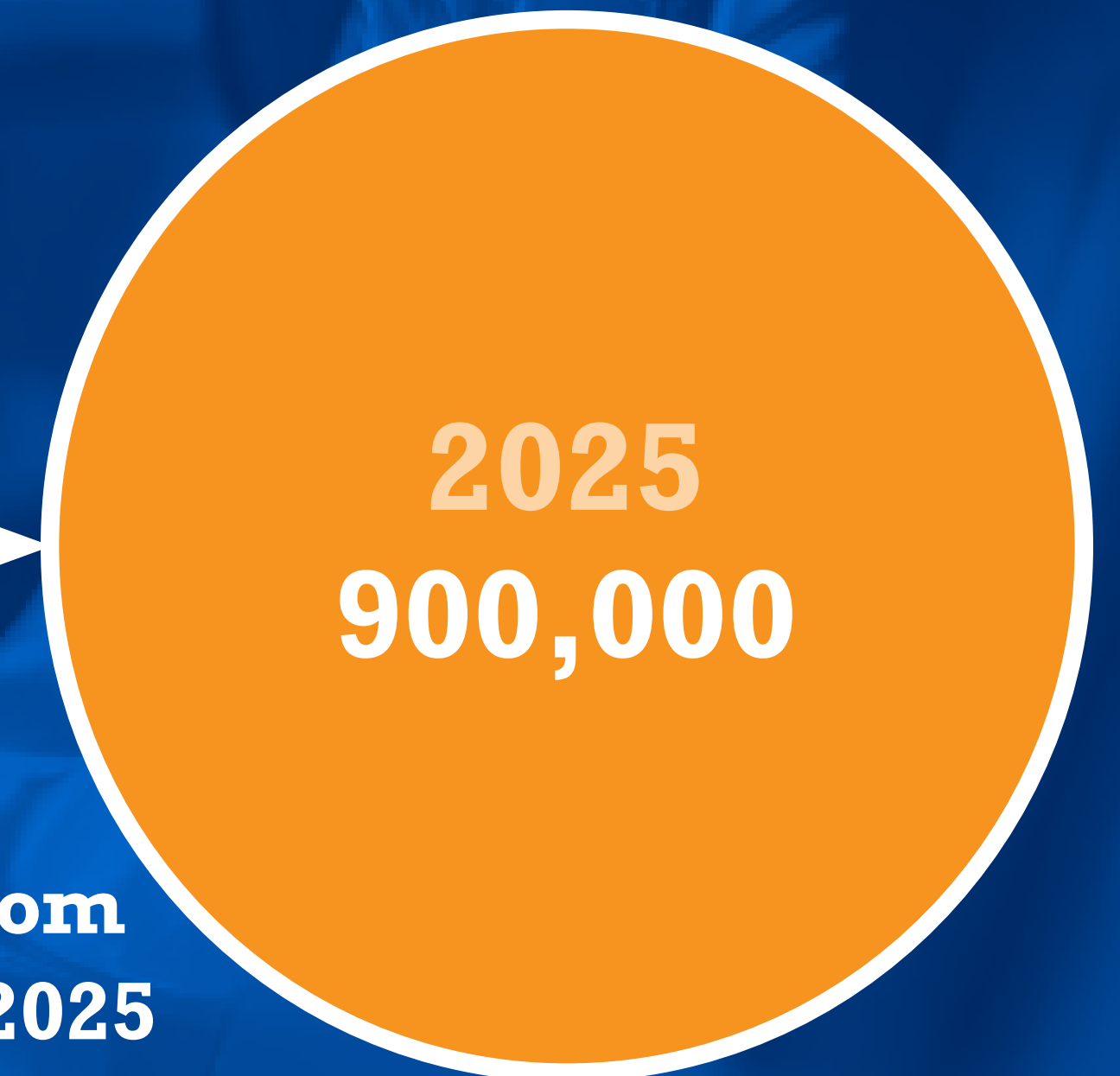


2020: Our new Plug-in Pledge

- Two years on, and the pace of road transport decarbonisation has accelerated. Time for an updated, more ambitious pledge!
- By 2025, the vehicle rental, leasing and fleet industry will be registering **400,000 battery electric cars and vans each year**. This means it will be responsible for **80% of sales in the UK**.
- In terms of total fleet, the industry will **own and operate 75% of battery electric vehicles on UK roads** – around 900,000 vehicles.



From 34,000 new BEV registrations in 2019 to 400,000 by 2025



Total BEV fleet to increase from 70,000 in 2019 to 900,000 by 2025

2020 Plug-in Pledge: BEVs and PHEVs

- If you include plug in hybrid vehicles, the figures are even more impressive.
- By 2025, the rental, leasing and fleet industry will be registering nearly 570,000 plug-in cars and vans every year and will own and operate around 1.3m plug-in vehicles in total.

2025
Total Plug-in fleet
1.3 million

2025
Annual new plug-in registrations
570,000

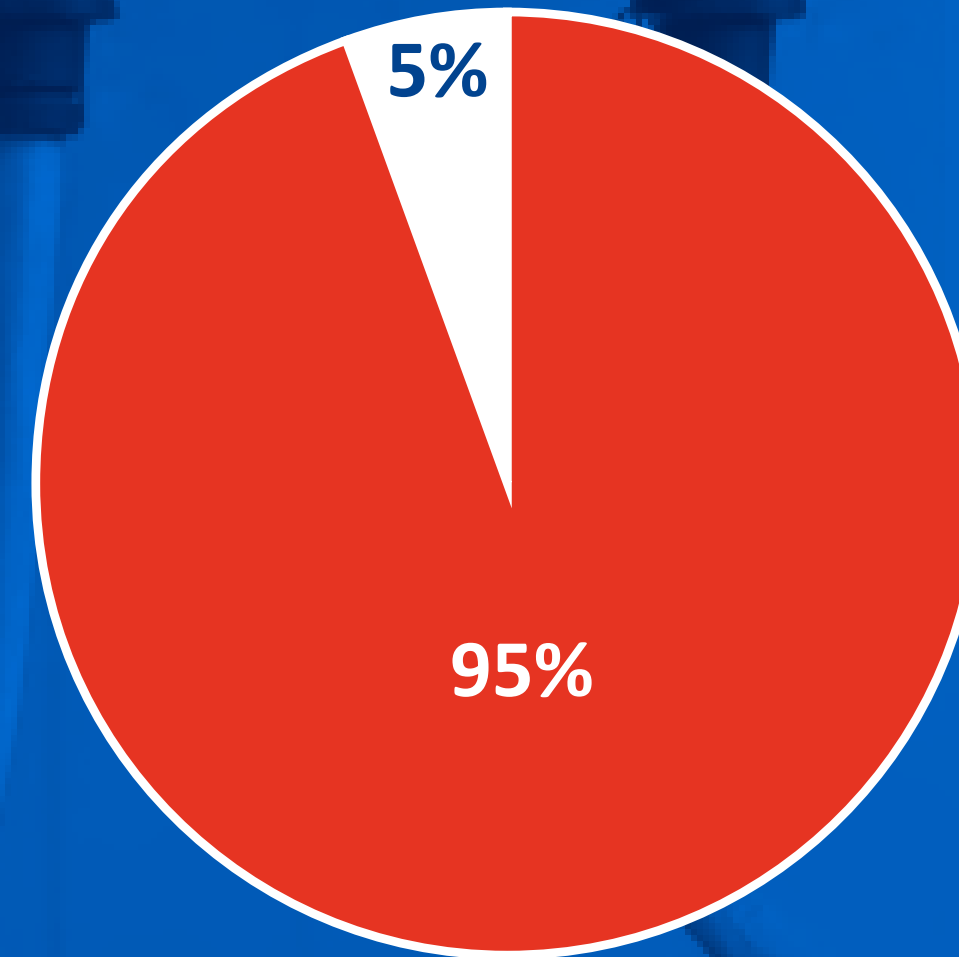
2020 Plug-in Pledge: Vans vs Cars

Electric car take up will vastly outpace electric van take up because of:

- Limited EV model range and functionality
- EVs unable to meet specific use case requirements (payload or additional power requirements)
- Lack of access to affordable charging infrastructure

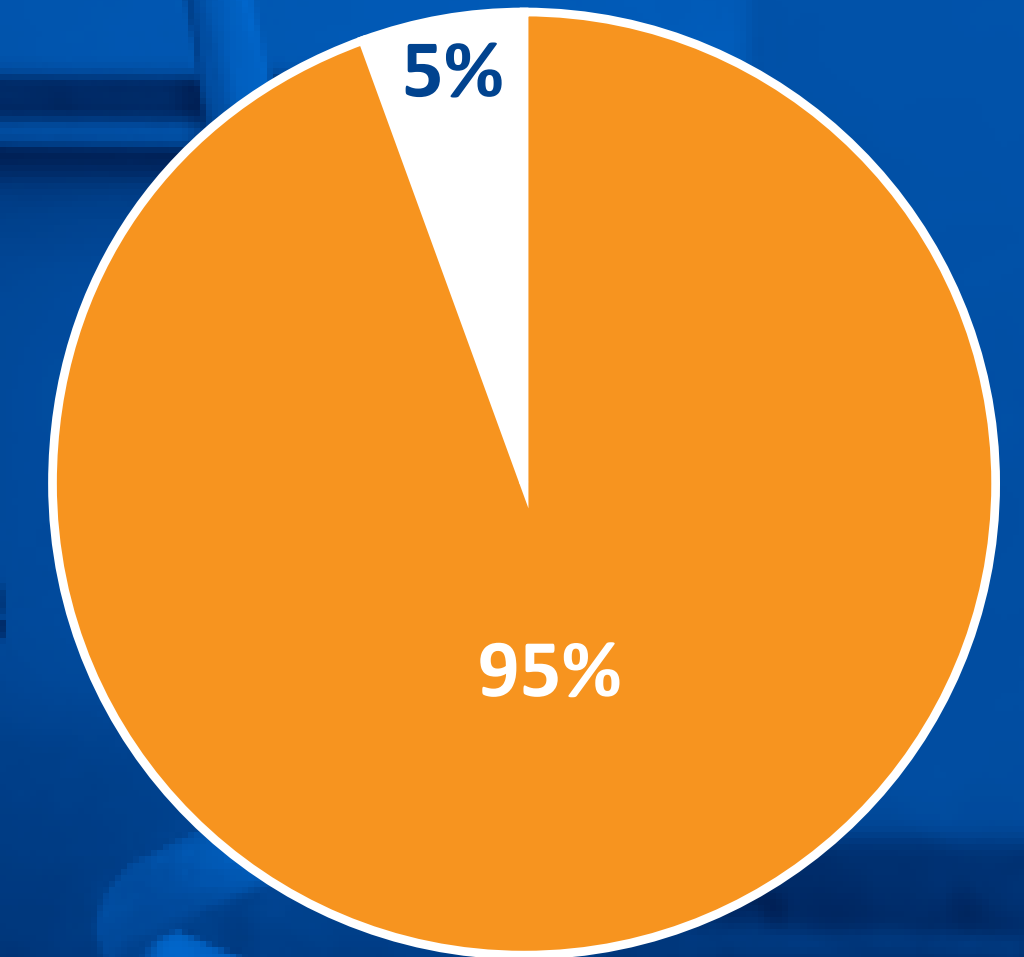
By 2025

**Total of 400,000
New BEV Registrations**



■ BEV Vans
■ BEV Cars

**Total of 570,000
New Plug-in (PHEV & BEV)
Registrations**



■ Plug-in Vans
■ Plug-in Cars

2020 Plug-in Pledge: Industry Segments

- If you look deeper, there are some very different decarbonisation trajectories depending on what fleet segment you are looking at.

New Registrations of BEV & PHEV Cars and Vans by 2025



Fleets

29% BEV, 12% PHEV
1.2 million total



Private Lease

10% BEV, 4% PHEV
210,000 total



Rental

7% BEV, 3% PHEV
300,000 total



Car Club

42% BEV, 1% PHEV
10,000 total

