

Q3-2019 MARKET ESTIMATE

BVRLA Business fleet leasing
Year-on-year change
1,211,000 (-5.5%)



Q3-2019 MARKET TRENDS

All BVRLA car leasing down 3%
This yr-on-yr growth comprised:

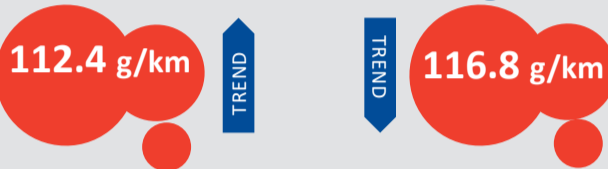


*includes HP, Contract purchase, PCP, ECOS & salary sacrifice



AVERAGE EMISSIONS BVRLA CAR FLEET

Whole fleet Q3 2019 New registrations



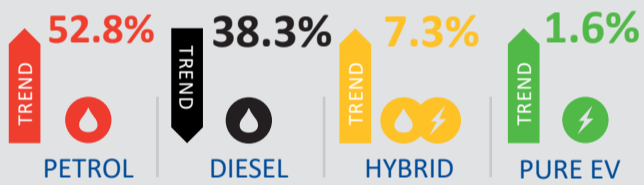
AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS

BVRLA fleet Q3 2019 UK fleet



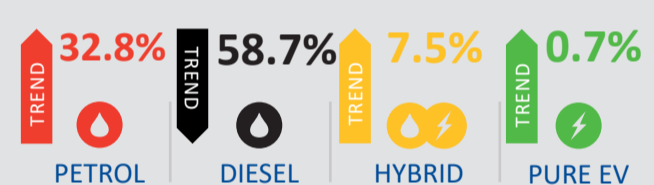
FUEL TYPE

BVRLA fleet new car registrations



FUEL TYPE

BVRLA total car fleet



CO2 EMISSION COMPARISON

BCH Q3 2019 PCH



BUSINESS CONFIDENCE

Q3 - 2019 Data on confidence in the UK economy was taken before the general election, and therefore remained negative and is consistent with findings by the CBI among all businesses in the UK. Confidence in the fleet leasing sector remains slightly negative but confidence in the outlook for fleet sizes grew for the second successive quarter.



CAR & LCV CONTRACT DURATION

Mean contract duration
No noticeable year-on-year change

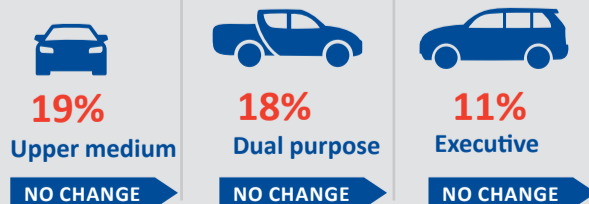


CAR & LCV CONTRACT MILEAGE

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 \(BVRLA\)](http://www.bvrla.co.uk) is the UK trade body for companies engaged in vehicle rental and leasing. Its 1000+ 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 465,000 jobs and contributing nearly £49bn 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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