



### Q1-2017 MARKET ESTIMATE

**BVRLA Business fleet leasing**  
Year-on-year change  
**1,345,000 (+6.5%)**



### Q1-2017 MARKET TRENDS

**All BVRLA fleet leasing cars up 10.7%**  
This growth comprises:



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



### AVERAGE EMISSIONS BVRLA CAR FLEET

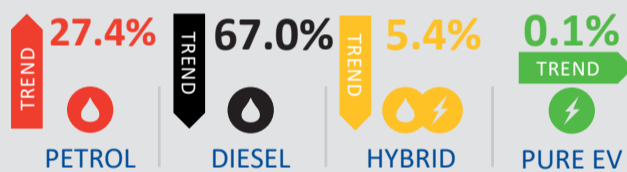


### AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS



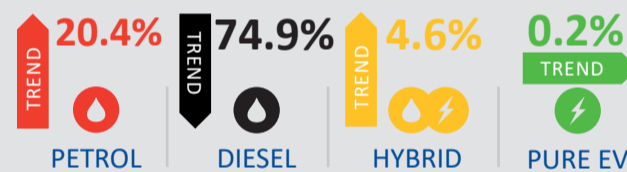
### FUEL TYPE

#### BVRLA fleet new car registrations



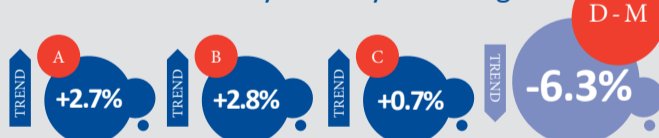
### FUEL TYPE

#### BVRLA total car fleet



### VED BAND PROFILE

**Decline in higher emission vehicles**  
Q1 2017 year-on-year change



### BUSINESS CONFIDENCE

Q4 2016 - Q1 2017



Members are becoming increasingly pessimistic about the economy, reflecting CBI sentiment.

Members are slightly less optimistic about fleet sizes.



### CAR & LCV CONTRACT DURATION

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

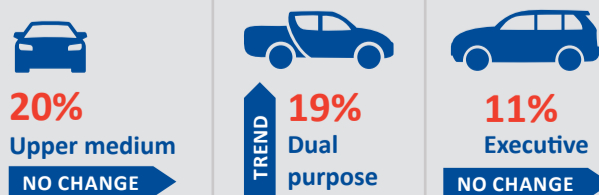


### CAR & LCV CONTRACT MILEAGE

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



### 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 900+ members operate a combined fleet of around 4.8million 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.