



Q2-2017 MARKET ESTIMATE

BVRLA Business fleet leasing
Year-on-year change
1,350,000 (+7.6%)



Q2-2017 MARKET TRENDS

All BVRLA car leasing up 8%
This yr-on-yr growth comprises:



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



AVERAGE EMISSIONS BVRLA CAR FLEET

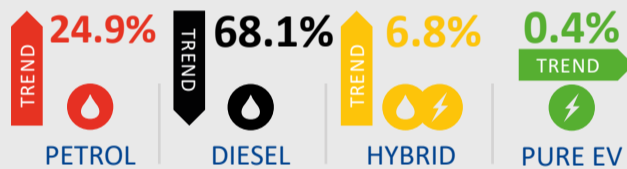


AVERAGE CAR FLEET EMISSIONS NEW REGISTRATIONS



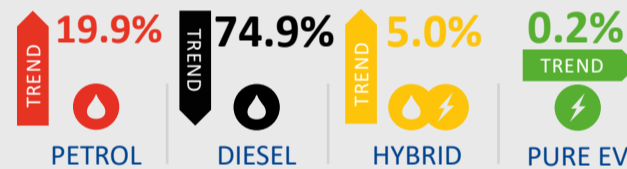
FUEL TYPE

BVRLA fleet new car registrations



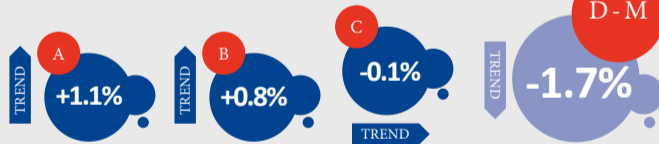
FUEL TYPE

BVRLA total car fleet



VED BAND PROFILE

Decline in higher emission vehicles
Q2 2017 year-on-year change



BUSINESS CONFIDENCE

Q1 2017 - Q2 2017 Confidence measures generally unchanged from Q1 2017. Economy and fleet leasing sector are likely to deteriorate in the coming six months. Members continue to be slightly less optimistic about fleet sizes than in Q1 2017.



CAR & LCV CONTRACT DURATION

Mean contract duration
No noticeable year-on-year change

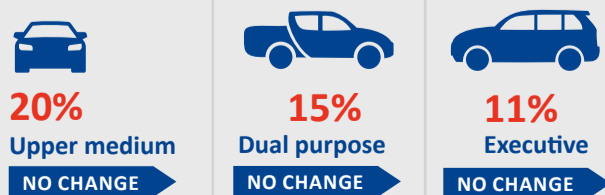


CAR & LCV CONTRACT MILEAGE

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.