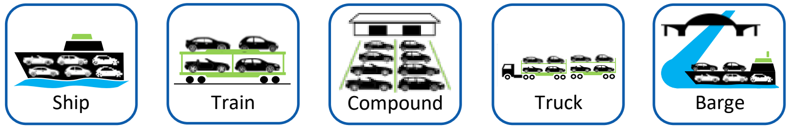
The Association of European Vehicle Logistics

UK & Ireland

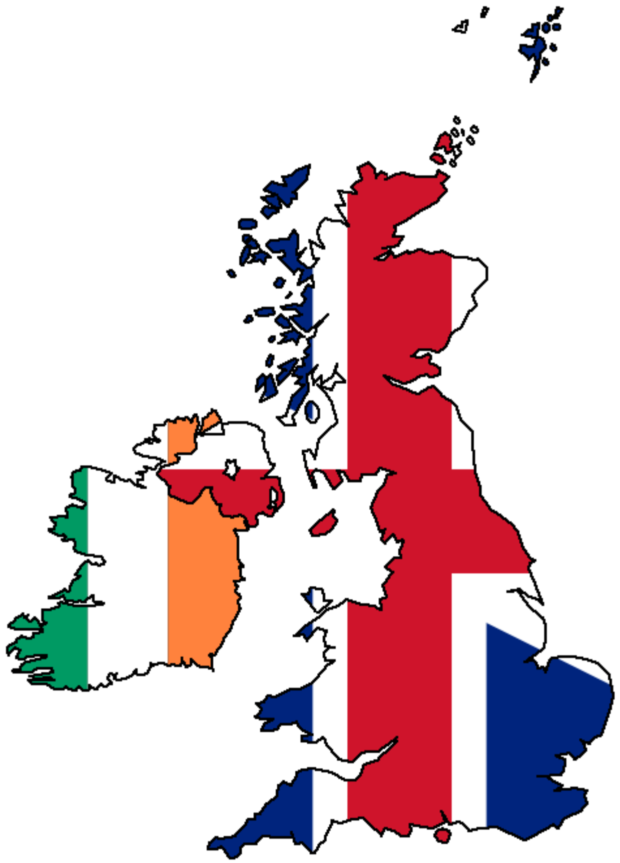
Mark Hindley



New Car Sales 2018

United Kingdom 2.36m

Eire 121k



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Market update 2019

SMMT 2019 Forecasts

- 2019 Cars registrations at 2.3m, down 2.3% on the 2018 level.
- Diesel car volume of 0.624m, down 16.9% on 2018 and reducing market share to 27.0%.
- AFVs registrations to rise 25.3% and plug-ins up 43.0%, taking market shares to 7.7% and 3.7%
- LCV registrations at 0.345m, down 3.4% on the 2018 level

SMMT DRIVING THE MOTOR INDUSTRY

March	Total	Diesel	Petrol	AFV	Private	Fleet	Business
2019	458,054	120,677	312,075	25,302	222,115	223,288	12,651
2018	474,069	153,611	296,945	23,513	228,503	222,634	22,932
% change	-3.4%	-21.4%	5.1%	7.6%	-2.8%	0.3%	-44.8%
Mkt share '19		26.3%	68.1%	5.5%	48.5%	48.7%	2.8%
Mkt share '18		32.4%	62.6%	5.0%	48.2%	47.0%	4.8%

Year-to-date	Total	Diesel	Petrol	AFV	Private	Fleet	Business
2019	701,036	191,784	468,415	40,837	330,613	353,696	16,727
2018	718,489	240,646	442,237	35,606	333,143	356,818	28,528
% change	-2.4%	-20.3%	5.9%	14.7%	-0.8%	-0.9%	-41.4%
Mkt share '19		27.4%	66.8%	5.8%	47.2%	50.5%	2.4%
Mkt share '18		33.5%	61.6%	5.0%	46.4%	49.7%	4.0%

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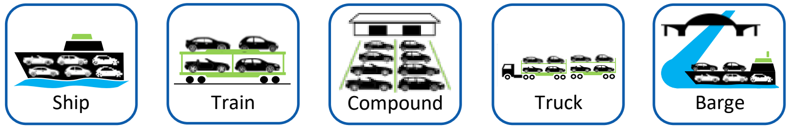
Group Update

- Group comprises 13 member companies representing c. 80% of an estimated total market of 5m new car & LCV movements
- Meetings 3 or 4 times yearly
- Developed relationships with SMMT, RHA and DFT
- Meeting planned in Ireland, Feb ’20
- Negotiation Skills Course held in April



Group objectives

- Promote the interests of UK and Ireland members to industry stakeholders and policy makers.
- Ensure the interests of members are represented at national Government and EU level on all key issues affecting our industry.
- Foster relations with other specialist groups and associations to help support common objectives.

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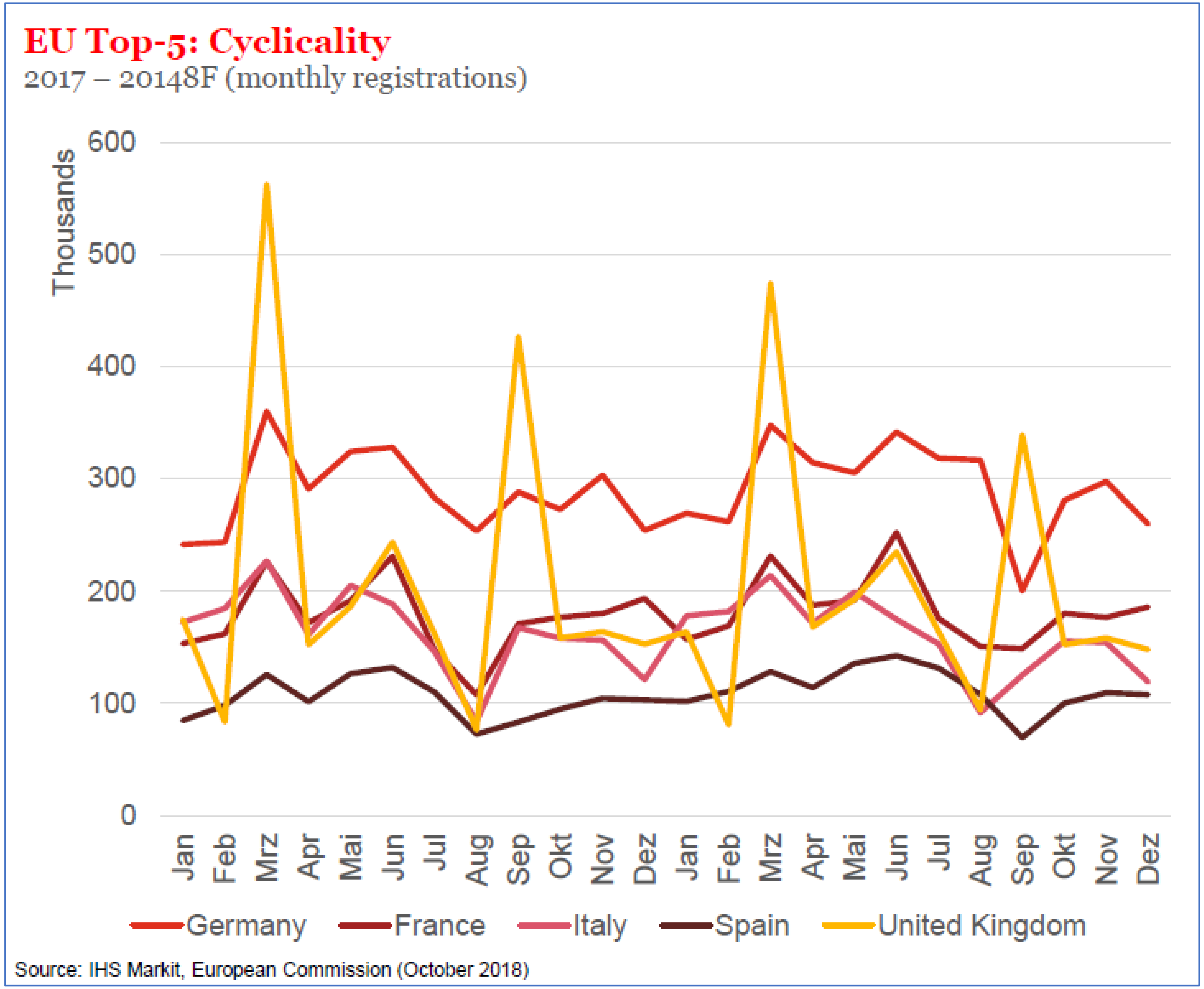
Main Agenda

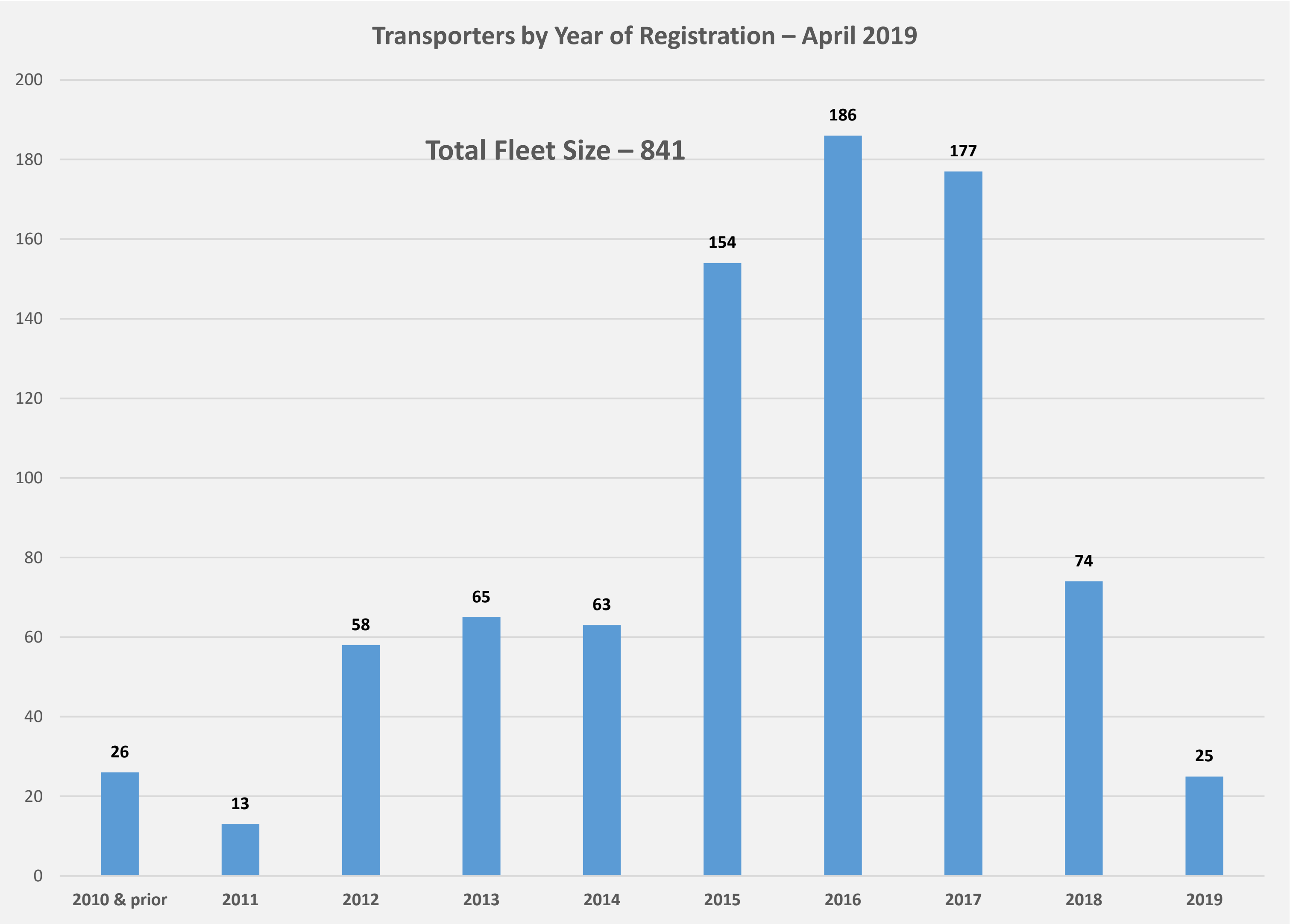
- Regulations, interpretation and application by authorities
- Introduction of new regulations and taxes
- Driver shortage training & remuneration
- End of month peaks
- March and September sales peaks
- Capacity shortfall
- Health and Safety

UK Market Volatility

Slide from Christoph Stürmer's presentation in Mainz



UK Transporter Types



Main Transporter Types (737 of 841)

60 - Low capacity Rigid Vehicles

70 – Semi Trailers

539 - Transporter Engineering +11

98 – Rolfo Ego

BREXIT

ECG

- Continued political uncertainty
- When will Brexit be resolved?
- Will the UK remain part of the Customs Union?

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Thank you for your attention!

Questions?

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