



THE SOCIETY OF MOTOR MANUFACTURERS AND TRADERS

MOTOR INDUSTRY FACTS 2015

UK AUTOMOTIVE
AT A GLANCE



UK AUTOMOTIVE
INDUSTRY:
PROFILE



MANUFACTURING



REGISTRATIONS



VEHICLES ON
THE ROAD



ENVIRONMENT



SAFETY AND
SECURITY



CONNECTED
CARS



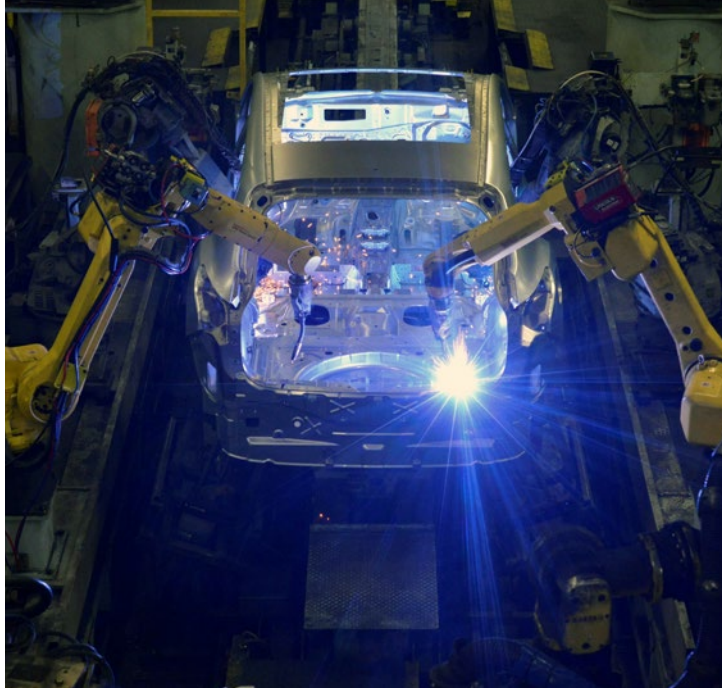
WHAT IS SMMT?

The Society of Motor Manufacturers and Traders (SMMT) is one of the largest and most influential trade associations operating in the UK. Its resources, reputation and unrivalled automotive data place it at the heart of the UK automotive industry. It undertakes a variety of activities to support and represent the interests of the industry and has a long history of achievement.

Working closely with member companies, SMMT acts as the voice of the UK motor industry, supporting and promoting its interests, at home and abroad, to government, stakeholders and the media.

SMMT represents over 600 automotive companies in the UK, providing them with a forum to voice their views on issues affecting the automotive sector, helping to guide strategies and build positive relationships with government and regulatory authorities.

To find out how to join SMMT and for more information, visit www.smmt.co.uk/memberservices or e-mail membership@smmt.co.uk.



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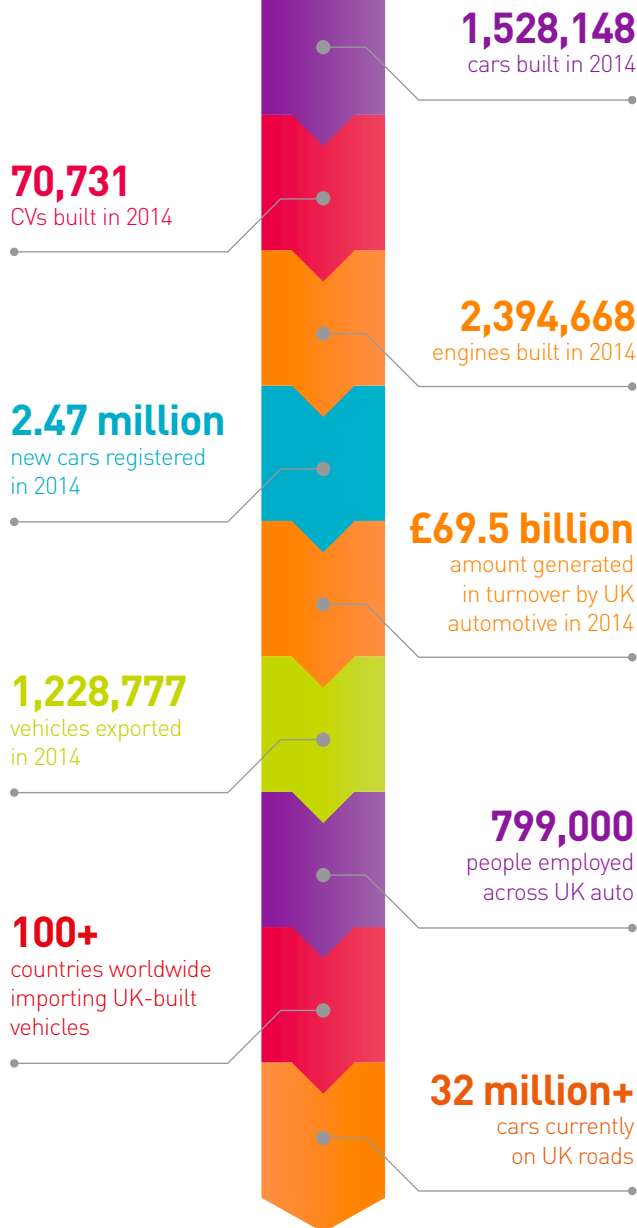
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The UK is home to:



UK AUTOMOTIVE LANDMARKS



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1. Jaguar Land Rover opens new Wolverhampton engine plant

- £500m invested
- 1,400 new jobs
- Plant to build new generation of lightweight, low-carbon engines



2. Two millionth Nissan Qashqai built in Sunderland

- Nissan's Sunderland plant produced its two millionth Qashqai in November 2014



3. Ford Dagenham investment

- Ford announced £475m investment into Dagenham engine plant, creating 318 new jobs
- Investment to support manufacture of new low-carbon engines for cars and commercial vehicles
- Dagenham produced its three millionth low-carbon diesel engine in September 2014



4. Land Rover Discovery Sport supply chain investment

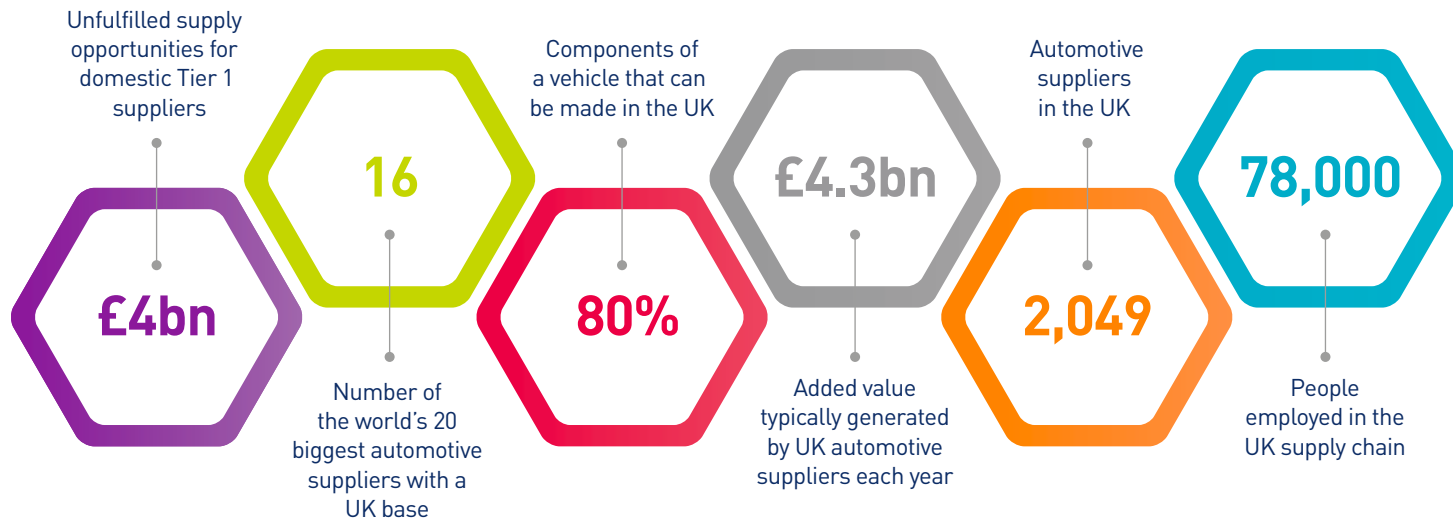
- Jaguar Land Rover secured £3.5bn of investment for UK supply chain companies with new model



5. Bentley invests £40 million in R&D

- New R&D centre at Crewe headquarters
- 300 new jobs created

UK AUTOMOTIVE SUPPLY CHAIN



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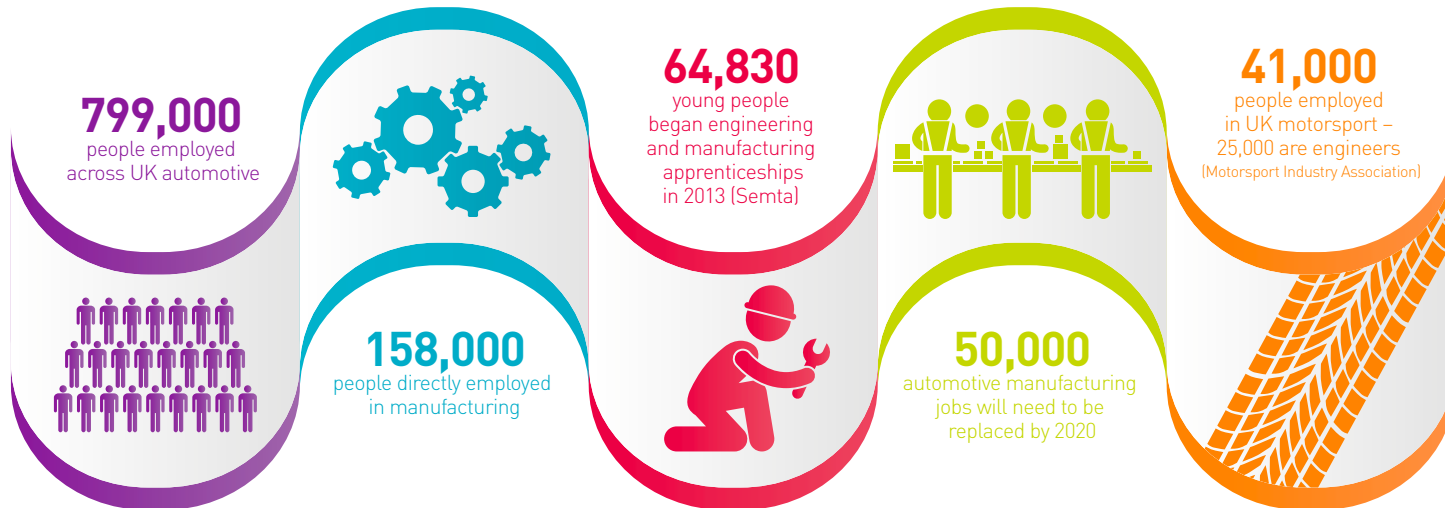
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UK AUTOMOTIVE SKILLS



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UK AUTOMOTIVE: BACKGROUND

In 2014 the UK automotive manufacturing industry...

Turned over
£69.5 billion

Invested
£2.1 billion
net capital

Exported
products worth
£34.6 billion,
accounting for
11.8% of the
UK's total
export goods

Invested
£2.4 billion
in R&D

Added
£15.5 billion
in value to the
UK economy



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Top fives in production – 2014



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Cars by brand

Make	Volume
Nissan	500,238
Land Rover	374,355
MINI	178,993
Toyota	172,215
Honda	121,799

Cars by model

Model	Volume
Nissan Qashqai	285,110
MINI	178,993
Toyota Auris	140,068
Nissan Juke	132,646
Range Rover Evoque	126,707

Commercial vehicles by brand

Make	Volume
Vauxhall	43,567
DAF	11,869
Land Rover	11,399
Alexander Dennis	1,793
Dennis Eagle	741



Top 15 global automotive manufacturers in 2014

Rank	Country	Cars	Commercial vehicles	Total	% change
1	China	19,919,795	3,803,095	23,722,890	7.3%
2	USA	4,253,098	7,407,601	11,660,699	5.4%
3	Japan	8,277,070	1,497,488	9,774,558	1.5%
4	Germany	5,604,026	303,522	5,907,548	3.3%
5	South Korea	4,124,116	400,816	4,524,932	0.1%
6	India	3,158,215	681,945	3,840,160	-1.5%
7	Mexico	1,915,709	1,449,597	3,365,306	10.2%
8	Brazil	2,314,789	831,329	3,146,118	-15.3%
9	Spain	1,898,342	504,636	2,402,978	11.1%
10	Canada	913,533	1,480,357	2,393,890	0.6%
11	Russia	1,683,677	202,969	1,886,646	-13.6%
12	Thailand	742,678	1,137,329	1,880,007	-23.5%
13	France	1,495,000	322,000	1,817,000	4.4%
14	UK	1,528,148	70,731	1,598,879	0.1%
15	Indonesia	1,011,260	287,263	1,298,523	7.6%

Top 10 European automotive manufacturers in 2014

Rank	Country	Cars	Commercial Vehicles	Total	% change
1	Germany	5,604,026	303,522	5,907,548	3.3%
2	Spain	1,898,342	504,636	2,402,978	11.1%
3	France	1,495,000	322,000	1,817,000	4.4%
4	UK	1,528,148	70,731	1,598,879	0.1%
5	Czech Rep	1,246,506	4,714	1,251,220	10.4%
6	Slovakia	993,000	0	993,000	1.8%
7	Italy	401,317	296,547	697,864	6.0%
8	Poland	473,000	120,904	593,904	0.6%
9	Belgium	481,637	35,195	516,832	2.6%
10	Romania	391,422	0	391,422	-4.8%

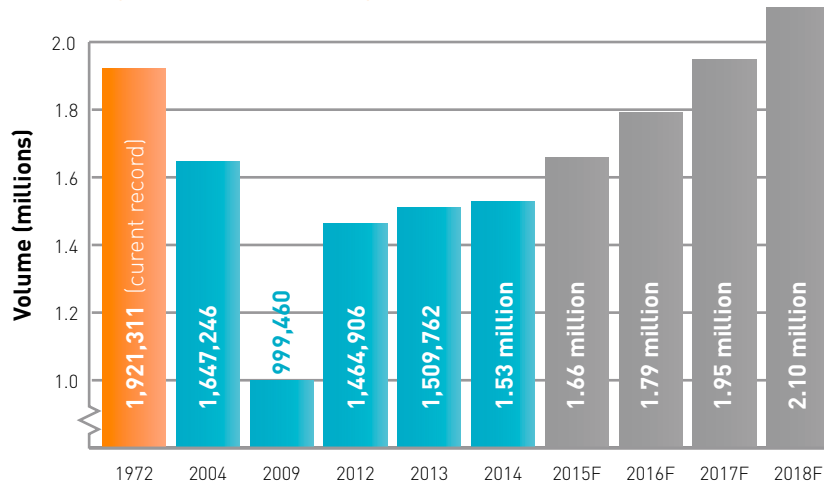
Source: OICA 2014

*See page 12 for 2014 UK car manufacturing data

UK AUTOMOTIVE MANUFACTURING



UK car manufacturing – selected years with AutoAnalysis forecasts 2015-2018



The value of the average car exported today has doubled from **£10,200** in 2004 to **£21,900** today

UK car manufacturing – 2013 vs 2014

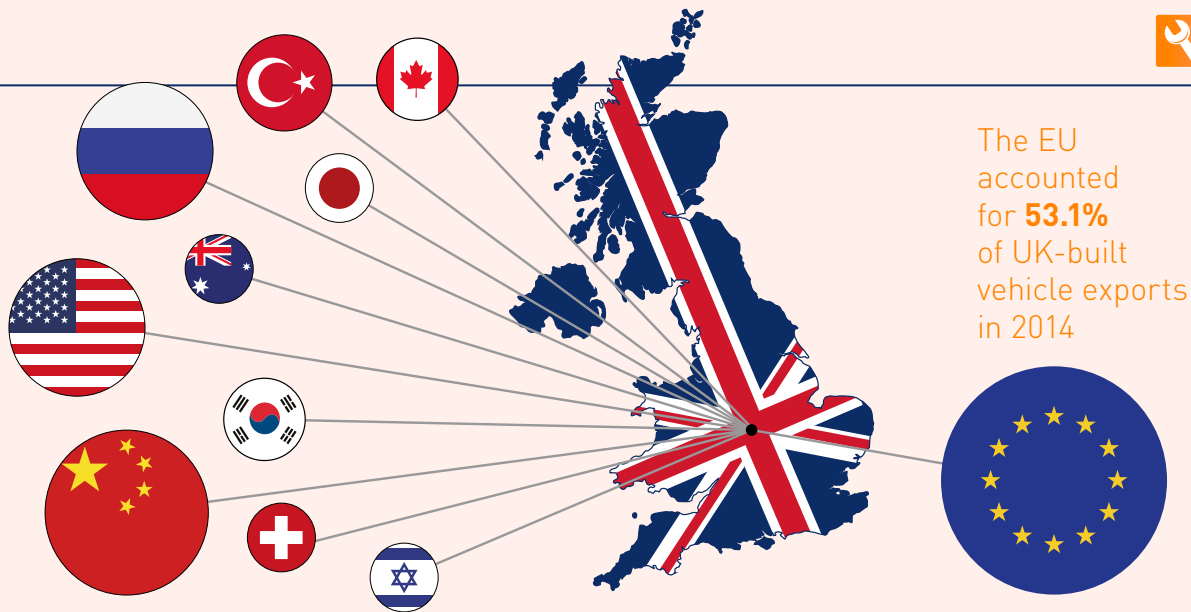
	2013	2014	% Change
Total	1,509,762	1,528,148	1.2 %
Home	308,367	332,952	8.0 %
Export	1,201,395	1,195,196	-0.5%
% export	79.6%	78.2%	

EXPORTS

In 2014 **78.2%** of vehicles built in the UK were exported

Top 10 export destinations outside the EU

China	11.5%
USA	8.8%
Russia	6.8%
Turkey	2.1%
Australia	1.9%
Japan	1.4%
Israel	1.3%
South Korea	1.1%
Switzerland	1.0%
Canada	1.0%



The UK exports vehicles to **more than 100** countries worldwide



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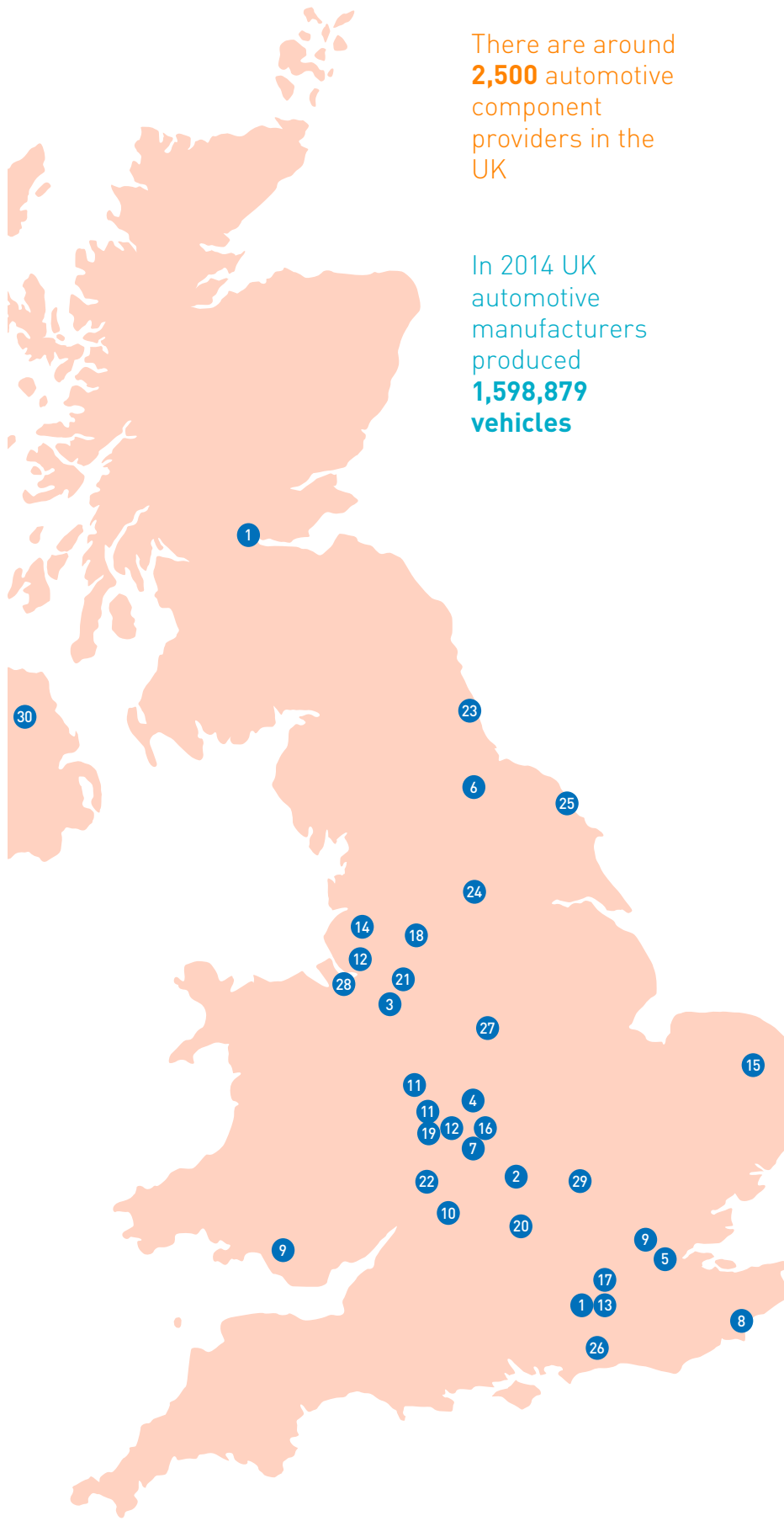


Key UK manufacturing sites

Key	Manufacturer	Location	Sector	Model
1	Alexander Dennis	Falkirk and Guildford	Bus and coach	Enviro bus range
2	Aston Martin	Gaydon	Car	DB9, Rapide, Virage, DBS and One-77
3	Bentley	Crewe	Car and engine	Continental, Flying Spur and Mulsanne
4	BMW	Hams Hall	Engine	Engine range
5	Caterham	Dartford	Car	Seven
6	Cummins	Darlington	Engine	Engine range
7	Dennis Eagle	Warwick	CV	N and W truck range/ Elite 2 truck range?
8	Euromotive	Hythe	Bus and coach	Minibus range
9	Ford	Bridgend and Dagenham	Engine	Engine range
10	Honda	Swindon	Car and engine	Civic, CR-V and Jazz
11	Jaguar Land Rover	Castle Bromwich and Wolverhampton	Car and engine	Jaguar: F-Type, XJ, XF and XK New engine range
12	Jaguar Land Rover	Solihull and Halewood	Car	Land Rover: Defender, Discovery, Discovery Sport, Range Rover, Range Rover Sport, Evoque and Freelander. Jaguar XE
13	John Dennis Coachbuilders	Guildford	Bus and coach	Fire vehicles
14	Leyland Trucks	Leyland	CV	DAF CF, LF and XF truck range
15	Lotus	Norwich	Car	Elise, Evora and Exige
16	LTC	Coventry	CV	TX Taxi
17	McLaren Automotive	Woking	Car	MP4-12C and P1
18	Mellor	Rochdale	Bus and coach	Accessible coach range
19	MG Motor	Longbridge	Car	MG3 and MG6
20	MINI	Oxford	Car	MINI 3-Door Hatch, MINI 5-Door Hatch, MINI Convertible, MINI Clubman, MINI Coupé, and MINI Roadster
21	Minibus Options	Whaley Bridge	Bus and coach	Minibus range
22	Morgan	Malvern	Car	Aero, Aero Supersport, Aero Coupe, 4/4, Plus 4, Plus 8, Roadster, 4 Seater and 3 Wheeler
23	Nissan	Sunderland	Car and engine	Juke, LEAF, Note and Qashqai
24	Optare	Leeds	Bus and coach	Solo, Tempo and Versa bus range
25	Plaxton	Scarborough	Bus and coach	Cheetah, Elite, Panther, Paragon coach bodies and Enviro bus range
26	Rolls-Royce	Goodwood	Car	Ghost, Phantom and Wraith
27	Toyota	Burnaston	Car and engine	Auris and Avensis
28	Vauxhall	Ellesmere Port	Car, CV and bus and coach	Astra, Vivaro van and minibus range
29	Warnerbus	Dunstable	Bus and coach	Minibus range
30	Wrightbus	Ballymena (NI)	Bus and coach	Bus range

There are around **2,500** automotive component providers in the UK

In 2014 UK automotive manufacturers produced **1,598,879** vehicles



In 2014 **2,394,668** engines were built in the UK

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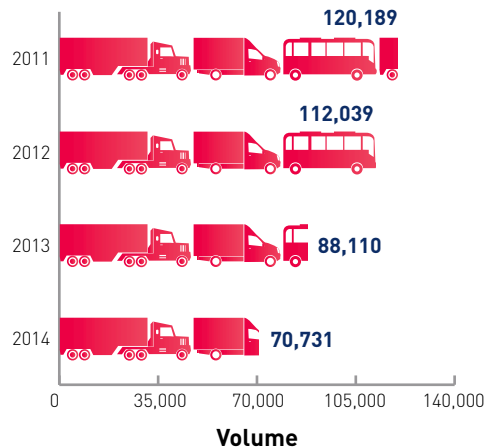
UK AUTOMOTIVE MANUFACTURING



UK AUTOMOTIVE
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Commercial vehicles and engines

UK CV manufacturing volumes

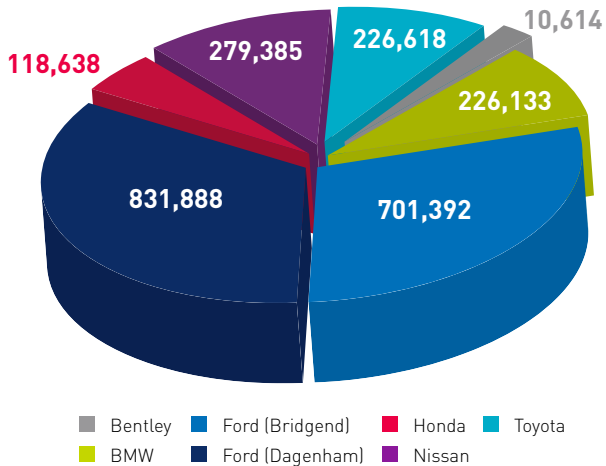


UK CV manufacturing – 2014 vs 2013

	2013	2014	% Change
Total	88,110	70,731	-19.7%
Home	40,200	35,909	-10.7%
Export	47,910	34,822	-27.3%
% export	54.4%	49.2%	



UK engine manufacturing volumes – 2014



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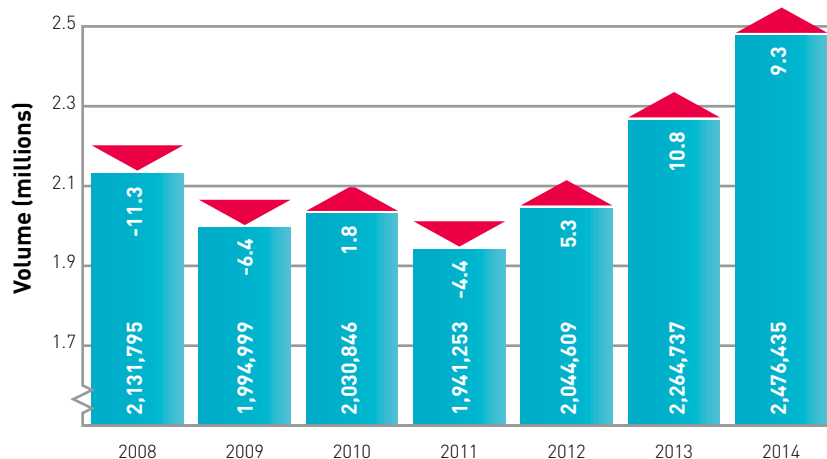
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REGISTRATIONS



2,476,435 cars were registered in 2014



2014 was the highest number of new car registrations in **10 years**

Top 10 sellers in 2014

	Model	Volume
1	Ford Fiesta	131,254
2	Ford Focus	85,140
3	Vauxhall Corsa	81,783
4	Volkswagen Golf	73,880
5	Vauxhall Astra	59,689
6	Nissan Qashqai	49,909
7	Volkswagen Polo	48,004
8	Audi A3	45,581
9	Fiat 500	44,005
10	Nissan Juke	39,263



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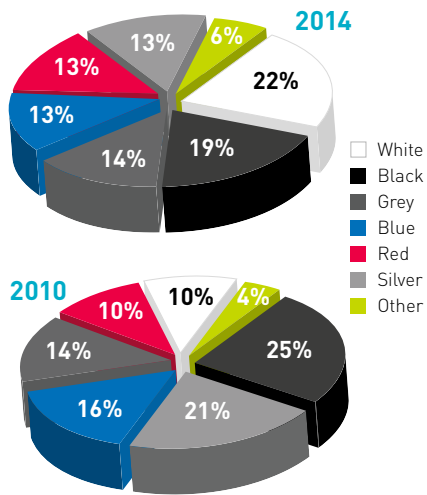
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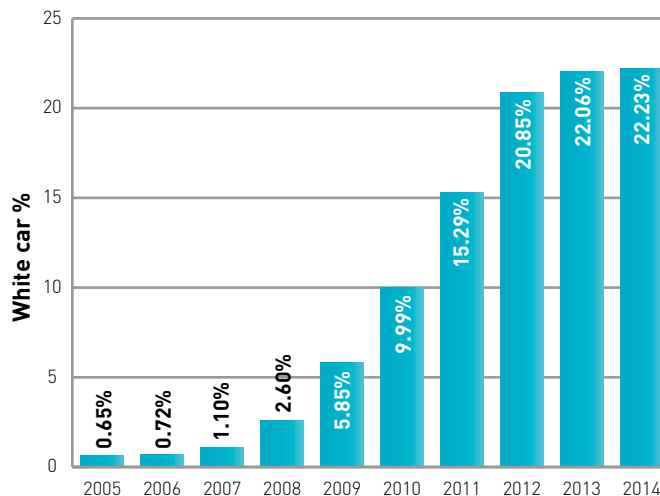
REGISTRATIONS



Colours



White car proportion of new car registrations, 2005-2014



Best-selling models by colour in 2014

Model	Volume
Beige	Fiat 500
Bronze	Toyota Auris
Brown	Honda Jazz
Gold	Ford B-Max
Maroon	Skoda Yeti
Mauve	Peugeot 107
Orange	MINI
Pink	Peugeot 208
Turquoise	Toyota Yaris
Yellow	Ford Fiesta

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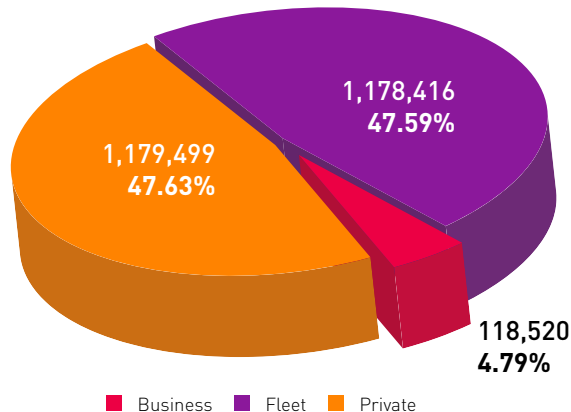
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2014 registrations by sales type



Top five new car registrations in 2014 by sales type



Private

Model	Volume
Ford Fiesta	79,434
Vauxhall Corsa	36,385
Volkswagen Polo	32,211
Fiat 500	28,279
Ford Focus	28,083



Fleet

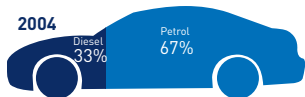
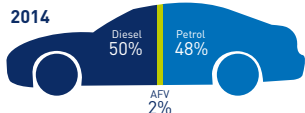
Model	Volume
Ford Focus	53,825
Volkswagen Golf	47,892
Ford Fiesta	47,641
Vauxhall Astra	40,812
Vauxhall Corsa	33,058



Business

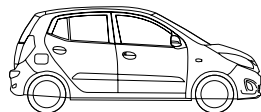
Model	Volume
Vauxhall Corsa	12,340
Nissan Micra	4,776
Toyota Yaris	4,642
Nissan Juke	4,624
Ford Fiesta	4,179

New car registrations by fuel type – 2004 vs 2014

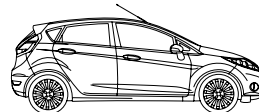


In 2014 pure electric car registrations **increased 167%**

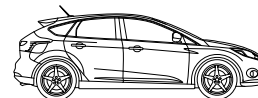
The change in segment registrations – 2004 vs 2014



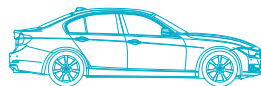
MINI: **+132.89%**



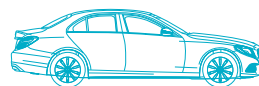
SUPER MINI: **+5.39%**



LOWER MEDIUM: **-11.27%**



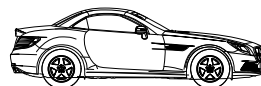
UPPER MEDIUM: **50.19%**



EXECUTIVE: **+9.56%**



LUXURY SALOON: **-28.22%**



SPECIALIST SPORTS: **-42.09%**



DUAL PURPOSE: **+62.92%**



MULTI PURPOSE: **+31.77%**

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Top cars registered by segment



Mini

Model	Volume	Segment share
Hyundai i10	25,030	29.7%
Volkswagen up!	22,461	26.6%
Suzuki Alto	14,330	17.1%
Skoda Citigo	9,848	11.6%
Vauxhall Agila	3,899	4.6%

Segment total: 84,237



Supermini

Model	Volume	Segment share
Ford Fiesta	131,254	14.8%
Vauxhall Corsa	81,783	9.2%
Volkswagen Polo	48,004	5.4%
Fiat 500	44,005	4.9%
Nissan Juke	39,263	4.4%

Segment total: 884,892



Lower Medium

Model	Volume	Segment share
Ford Focus	85,140	13.1%
Volkswagen Golf	73,880	11.4%
Vauxhall Astra	59,689	9.2%
Nissan Qashqai	49,909	7.7%
Audi A3	45,581	7.0%

Segment total: 647,438

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Top cars registered by segment



Upper Medium



Executive



Luxury

Model	Volume	Segment share
BMW 3 Series	38,649	16.9%
Vauxhall Insignia	31,313	13.6%
Audi A4	22,728	9.9%
Skoda Octavia	20,984	9.1%
Volkswagen Passat	19,658	8.5%

Segment total: 228,656

Model	Volume	Segment share
Mercedes-Benz C-Class	31,525	26.2%
Mercedes-Benz E-Class	28,707	23.8%
BMW 5 Series	21,511	17.9%
Audi A6	15,055	12.5%
Jaguar XF	13,646	11.3%

Segment total: 120,147

Model	Volume	Segment share
Mercedes-Benz S-Class	2,789	28.5%
Mercedes-Benz SL	1,236	12.6%
BMW 7 Series	1,225	12.5%
Audi A8	1,197	12.2%
Jaguar XJ	1,181	12.0%

Segment total: 9,766

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Top cars registered by segment



Model	Volume	Segment share
Mercedes-Benz SLK	5,451	12.7%
Volkswagen Scirocco	4,210	9.8%
Audi TT	4,171	9.7%
Mazda MX-5	2,982	6.9%
BMW 6 Series	2,830	6.6%

Segment total: 42,817



Model	Volume	Segment share
Ford Kuga	24,353	8.3%
Kia Sportage	21,575	7.3%
Range Rover Evoque	18,723	6.4%
Volkswagen Tiguan	16,954	5.7%
Hyundai Ix35	16,890	5.7%

Segment total: 292,347



Model	Volume	Segment share
Citroen C4 Picasso	19,164	11.5%
Ford C-Max	18,350	11.0%
Vauxhall Zafira Tourer	16,061	9.6%
Vauxhall Zafira	15,031	9.0%
Ford B-Max	13,691	8.2%

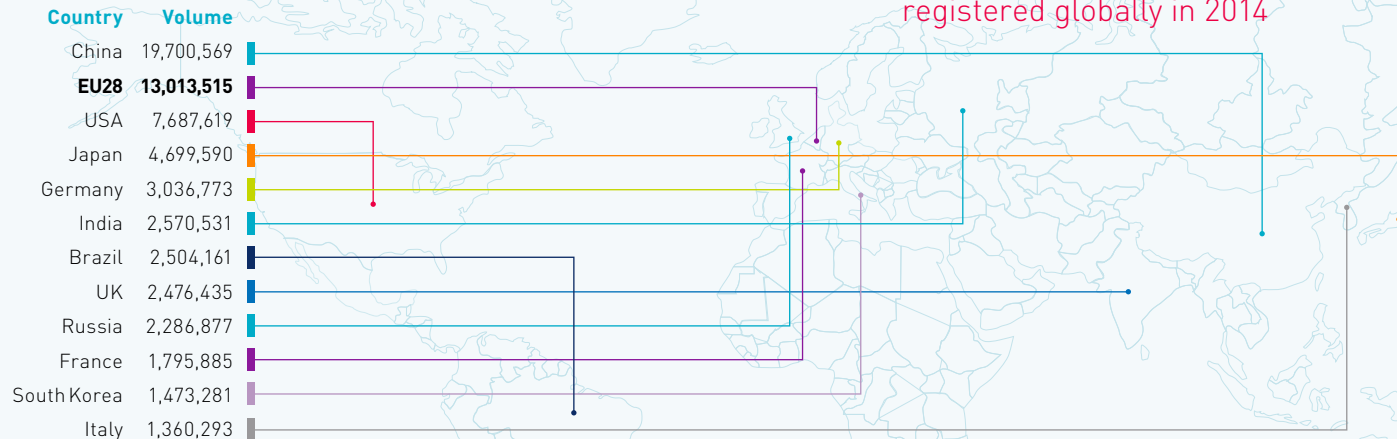
Segment total: 166,135



REGISTRATIONS



International new car registrations – 2014



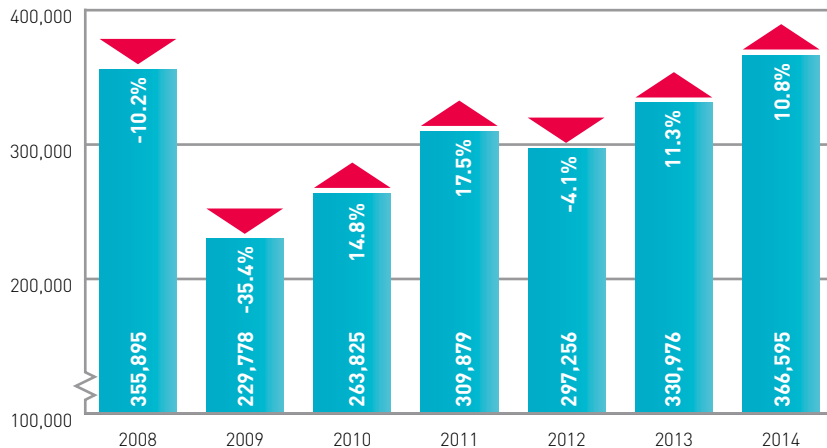
Source: OICA 2014



REGISTRATIONS



Commercial vehicle registrations – 2008-2014



2014 commercial vehicle registrations

	LCVs up to 3.5t	Rigids	Artics	Bus and coach
Volume	321,686	25,888	15,581	3,440
% change	18.7%	-23.1%	-31.0%	-6.6%



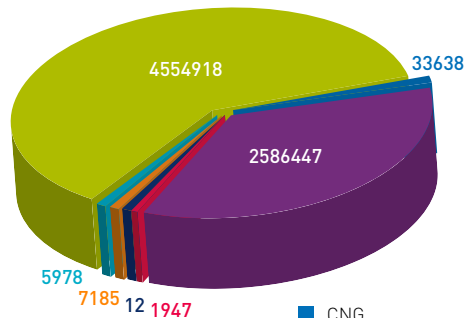
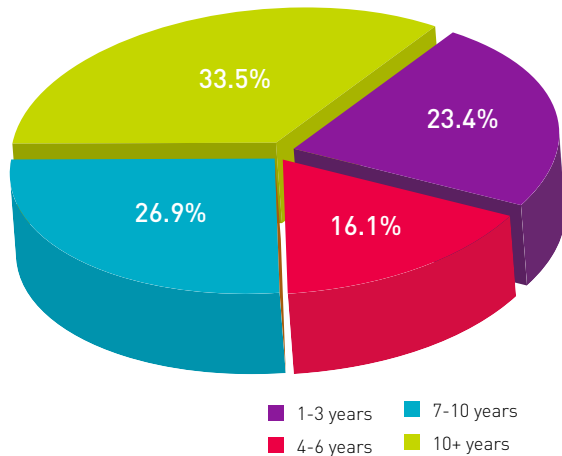
366,595
commercial
vehicles were
registered
in 2014



USED CAR TRANSACTIONS



Age of used cars sold in 2014



There were
7,190,125 used
car transactions
in 2014

Top 10 used best-sellers

Make	Total
Ford Focus	326,808
Ford Fiesta	324,275
Vauxhall Corsa	316,750
Vauxhall Astra	276,007
Volkswagen Golf	236,272
Renault Clio	174,754
Peugeot 206	139,024
Volkswagen Polo	134,792
Ford Mondeo	120,113
Renault Megane	116,189



Cars on the road 2005-2014

Year	Cars (millions)
2005	30.5
2006	30.8
2007	31.1
2008	31.3
2009	31.0
2010	31.3
2011	31.4
2012	31.5
2013	31.9
2014	32.6

Total
vehicles
on UK
roads:
37,113,358

87.9%

CARS
32,612,782

10.4%

VANS
3,842,017

TRUCKS
569,921

1.5%

0.2%

**BUS &
COACH**
88,638

The average car on the road in the UK is **silver**, from the **Supermini** segment and **7.8 years old**

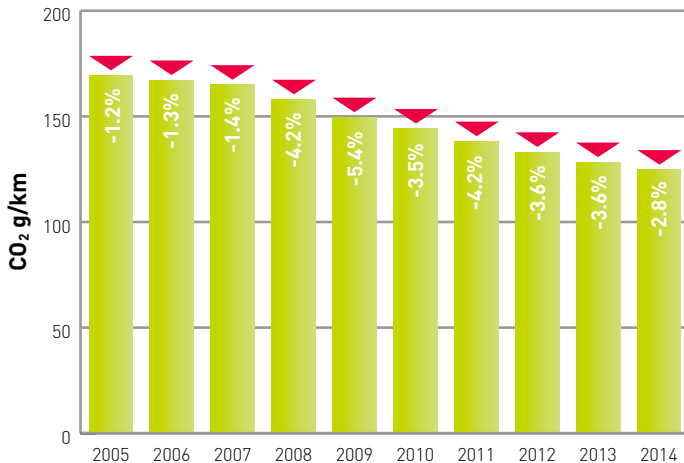
The **number** of vehicles on the road **grew 2.2%** in 2014 – the **biggest** increase since 2002

You are most likely to see a **yellow** car in **Cornwall**

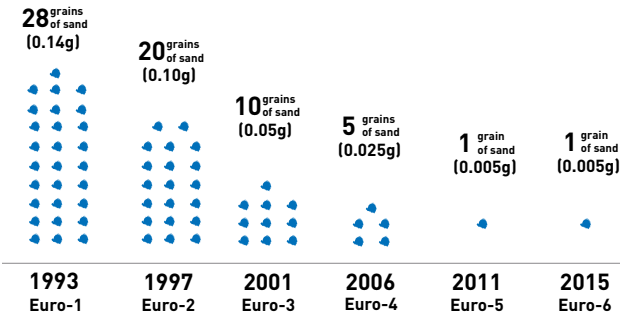


Reductions in emissions

UK average CO₂ emissions in new cars – 2005-2014



If particulate matter (PM₁₀) emitted per kilometre from diesel cars was measured in grains of sand...

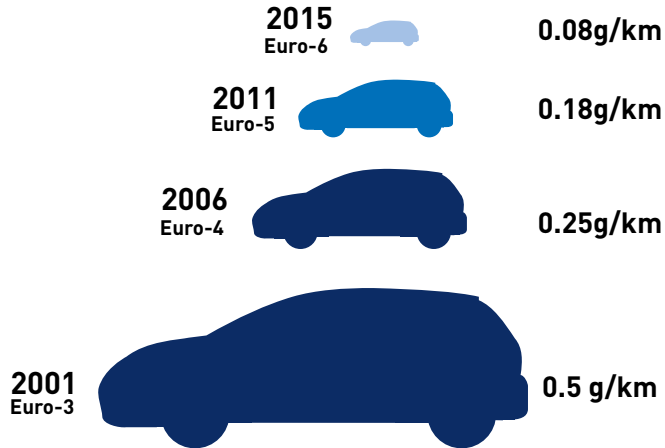


Over the past decade, new car CO₂ emissions have reduced **26.4%**





Reduction in diesel car NO_x emissions, Euro-3 to Euro-6



Euro-6



A Euro-6 bus emits 95% less NO_x than a Euro-5 bus.

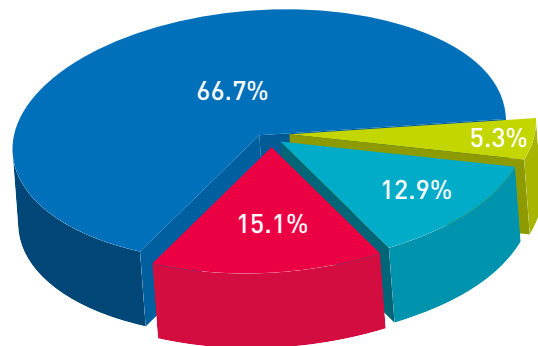
A new car in 2014 is typically **19.2% more fuel-efficient** than one bought in 2009



ENVIRONMENT

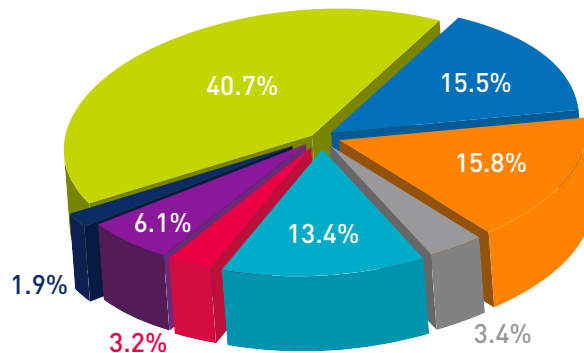


2014 alternatively-fuelled registrations by type

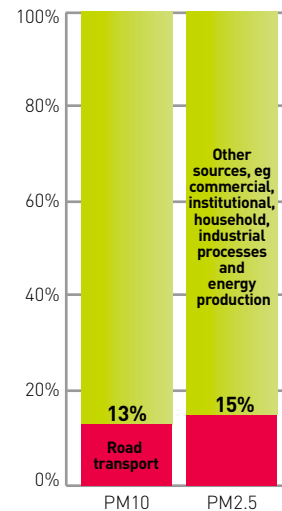


■ Pure electric ■ Petrol/electric
■ Other electric ■ Diesel/electric

CO₂ emissions by sector (DECC)

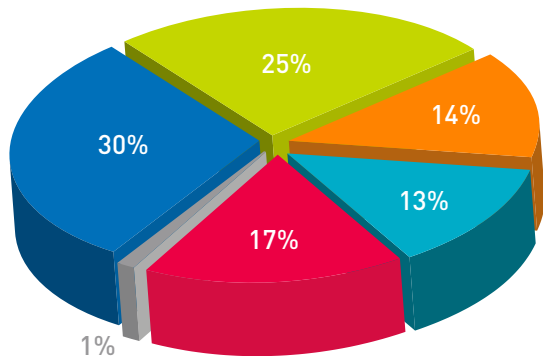


■ Cars ■ Other road ■ Energy ■ Residential
■ LCVs ■ Other transport ■ Business ■ Other

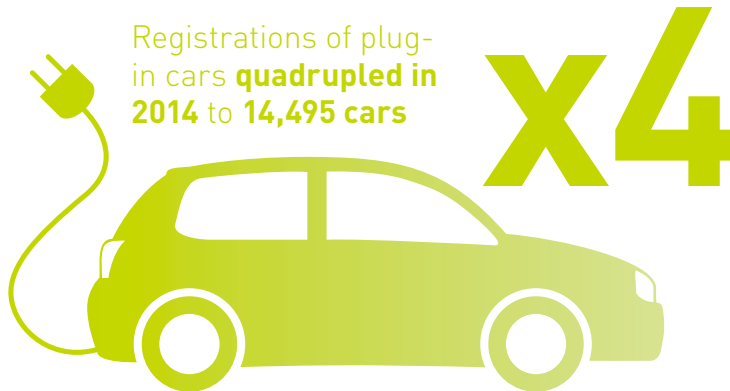




Contribution of NO_x emissions in the UK



■ Electricity generation ■ Heating ■ Cars
■ Heavy-duty vehicles ■ Other transport ■ Other



UK NO_x emissions from passenger cars have fallen **81% since 1990** – the biggest reduction of any sector

Source: DEFRA AQP





Vehicle theft 2005-2014

Year	Theft of vehicle	% change on previous year	Theft from vehicle	% change on previous year
2005/06	203,239	-12.14	507,239	1.37
2006/07	182,464	-10.22	502,651	-0.9
2007/08	159,704	-12.47	432,412	-13.97
2008/09	137,508	-13.90	396,976	-8.19
2009/10	109,684	-20.23	339,170	-14.56
2010/11	99,208	-9.55	313,467	-7.58
2011/12	85,803	-13.51	300,377	-4.18
2012/13	74,168	-13.56	285,047	-5.10
2013/14	70,056	-5.54	276,352	-3.05

Source: ONS 2014

Number of dangerous driving offences on UK roads

Year	Number of offences	% change on previous year
2005/06	5,923	-11.19
2006/07	5,353	-9.62
2007/08	4,725	-11.73
2008/09	4,240	-10.26
2009/10	3,941	-7.05
2010/11	3,475	-11.8
2011/12	3,239	-6.79
2012/13	3,092	-4.54
2013/14	3,152	1.94

The **recall response rate** in the UK is **more than 90%** – one of the highest in Europe

CONNECTED CARS



UK AUTOMOTIVE
AT A GLANCE

UK AUTOMOTIVE
INDUSTRY:
PROFILE

MANUFACTURING

REGISTRATIONS

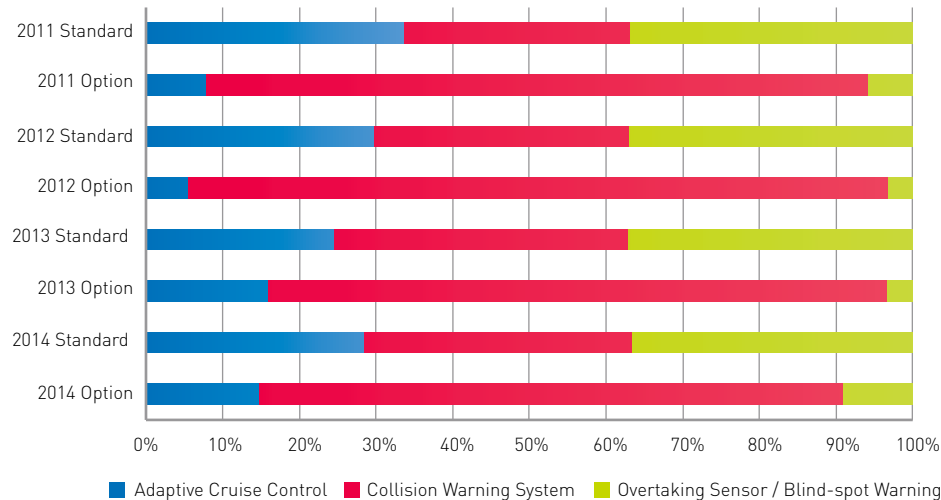
VEHICLES ON
THE ROAD

ENVIRONMENT

SAFETY AND
SECURITY

CONNECTED
CARS

The take up of driverless technology

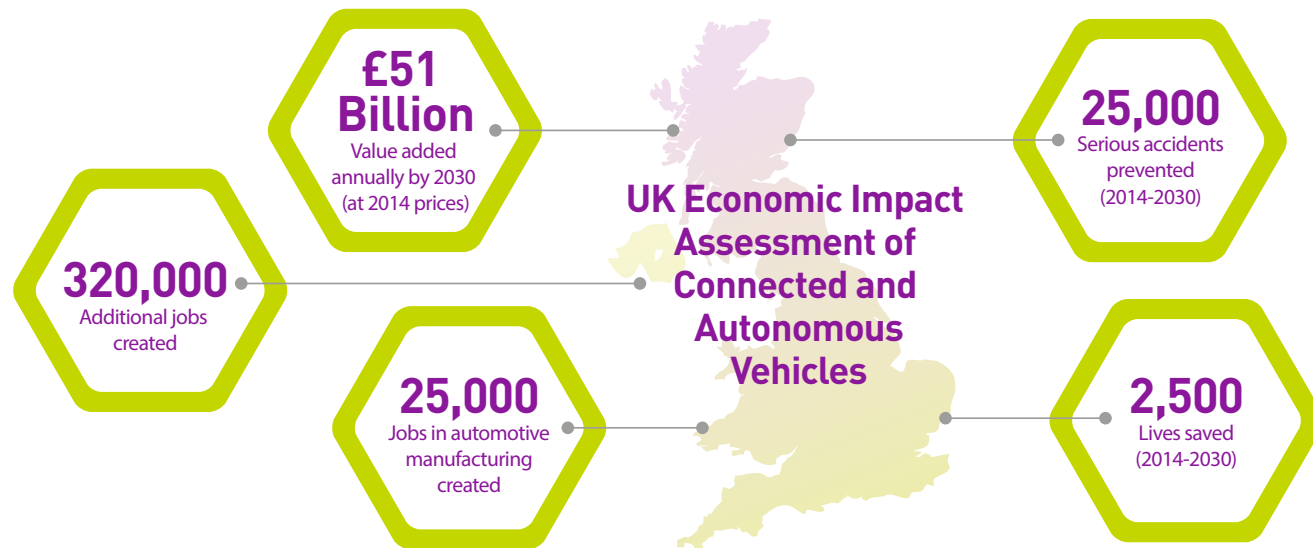


Source: JATO Dynamics

For every **10,000 errors** made by a **human driver**, an **autonomous vehicle** will make **just one**

Source: Institution of Engineering and Technology





SMMT SUBSIDIARIES AND PARTNERSHIPS

Automotive Council



The Automotive Council was established in 2009 as a collaborative partnership between industry and government to shape the future of the UK's automotive industry.

Bringing together senior executives from across the industry, the work of the Council is channelled through three working groups: the Supply Chain Group, the Technology Group and the Business Environment and Skills Group. With top-level political and industry support, the Council is able to support the UK's dynamic, innovative and cutting-edge automotive sector.

www.automotivecouncil.co.uk

SMMT Industry Forum



Industry Forum was formed in 1994, initially as a unique collaboration between leading vehicle manufacturers, SMMT and government to improve the performance and competitiveness of the UK's automotive supply chain.

Continued measurable success has led to sustained growth into many other sectors including aerospace, construction, domestic appliances, electronics and food. Industry Forum now provides support to blue chip organisations in more than 30 countries across five continents.

www.industryforum.co.uk

Motor Codes



Motor Codes operates Trading Standards-approved codes of practice, outlining clear-cut customer service level expectations in the new car sales, service and repair, and vehicle warranty sectors.

It serves as a business driver for subscribing garages and offers reassurance to motorists through transparent online garage ratings and an independent advisory service.

www.motorcodes.co.uk

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SMMT reports and publications

- **Annual Sustainability Report**
www.smmmt.co.uk/sustainability
- **Dealer Energy Efficiency Guide**
www.smmmt.co.uk/dealerenergyefficiency
- **Invest Now Report**
<http://www.smmmt.co.uk/invest-now/>
- **New Car CO₂ Report 2014**
<http://www.smmmt.co.uk/co2report>

More information

ACEA (Association des Constructeurs Européens d'Automobiles)
www.acea.be

Automotive Council
www.automotivecouncil.co.uk

BIS (Department for Business, Innovation and Skills)
www.bis.gov.uk

BVRLA (British Vehicle Rental and Leasing Association)
www.bvrla.co.uk

DfT (Department for Transport)
www.dft.gov.uk

DVLA (Driver and Vehicle Licensing Agency)
www.dft.gov.uk/dvla

EEF – The Manufacturers' Organisation
www.eef.org.uk

European Commission
www.ec.europa.eu/index_en.htm

FTA (Freight Transport Association)
www.fta.co.uk

Higher Apprenticeship Fund
www.apprenticeships.org.uk

LowCVP
www.lowcvp.org.uk

Motor Codes
www.motorcodes.co.uk

OLEV (Office for Low Emission Vehicles)
www.dft.gov.uk/topics/sustainable/olev/

RMI (Retail Motor Industry Federation)
www.rmif.co.uk

RHA (Road Haulage Association)
www.rha.uk.net

RoadSafe
www.roadsafe.com

SMMT Award for Automotive Innovation
www.smmmt.co.uk/aai

SMMT Industry Forum
www.industryforum.co.uk

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