SMMT
DRIVING THE
MOTOR INDUSTRY

THE SOCIETY OF MOTOR MANUFACTURERS AND TRADERS
MOTOR INDUSTRY FACTS 2011

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SMMT
VEHICLE DATA
SMMT Automotive Information Services (AIS) is the primary source for motor industry data.
From production and first registration data to on the road vehicle sales, SMMT holds over 100 years of detailed UK automotive industry and vehicle data.
TO FIND OUT MORE GO TO
www.smmt.co.uk/dataservices

INDUSTRY PERFORMANCE

The automotive industry is a vital part of the UK economy.

- The UK produces over one million cars and commercial vehicles and over two million engines annually.
- The automotive sector contributes over 10% of total UK exports, delivering an average annual export value of more than £25bn over the last five years.*
- The UK automotive sector exports to over 100 markets worldwide.
- The UK had the fourth highest R&D spend in Europe and represented a fifth of core global R&D activity in 2010.*
- The automotive industry employs over 700,000 people from manufacturing to retailing and contributes £8.5bn added value to the economy.
- In 2010, the UK exported 75% of the vehicles it manufactured.
- Average new car CO_2 emissions have fallen 20.3% in the last 10 years to 144.2g/km CO_2.

The UK is home to:

- Seven volume car manufacturers and eight CV manufacturers.
- The largest number of specialist sports car manufacturers in the world and 19 of the world's top 20 suppliers.
- Eight Formula One teams, supported by more than 300 specialist motorsport companies, employing nearly 50,000 people in motorsport valley.
- The motor industry in the UK has a strong future and is at the heart of the low carbon agenda, investing in R&D that will deliver ever cleaner, safer and more fuel-efficient cars.

*Source: *Department for Business Innovation and Skills (BIS) 2010 R&D Scoreboard*

INDUSTRY PERFORMANCE

Research and development

Innovation, design and engineering are at the heart of the UK automotive industry.

Over £1.5bn is spent annually on automotive R&D in the UK and strategic government support for the transition to low carbon will continue to support over 700,000 jobs in the UK that rely on automotive manufacturing.

In 2009, UK R&D investment in automobile and parts grew 9%.*

Eight of the top 25 global and four of the top 25 UK R&D investors are from the automobile and parts sector.*

In total, there are 31 automobile and parts companies in the UK1000 and 72 in the G1000.

(UK1000 is the top 1000 manufacturing companies in the UK. G1000 is the top 100 global manufacturing companies*).

*Source: *Department for Business Innovation and Skills (BIS) 2010 R&D Scoreboard.*

Sector profile

	2005	2006	2007	2008	2009
Automotive manufacturing sector turnover (£bn)	48.2	49.3	51.0	52.5	39.8
Share of total transport manufacturing turnover (%)	67.7	66.7	67.0	70.0	59.0
Total net capital investment (£bn)	1.3	1.4	0.9	1.4	0.8
Automotive sector value added (£bn)	9.4	9.9	10.3	11.2	8.5
Total employees directly dependent on the UK automotive sector	869,000	851,000	840,000	807,000	729,000
Value of exports (£bn)	23.7	24.1	26.1	28.0	23.8
Percentage of total UK exports (%)	11.2	9.9	11.8	11.8	10.5
All automotive sectors – value added share of GDP (%)	3.3	3.2	3.3	2.6	2.4
UK share of global passenger car production (%)	2.7	2.4	2.4	2.9	1.8
Number of UK volume car manufacturers	8	7	7	7	7
Number of UK commercial vehicle manufacturers	9	9	9	9	8

UK AUTOMOTIVE MANUFACTURING

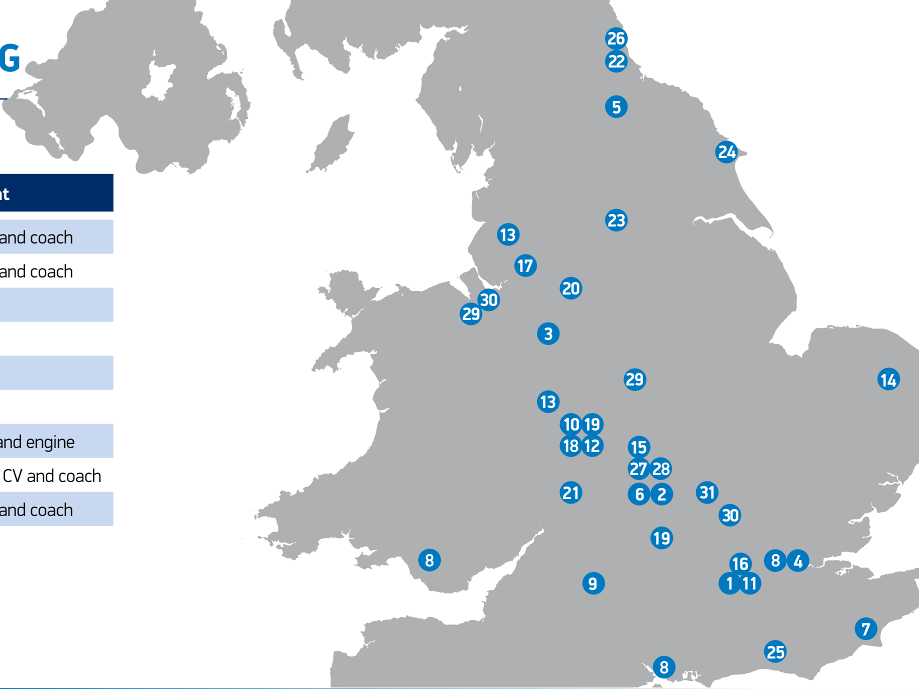
Key UK manufacturing sites

Key	Manufacturer	Where	What
1	Alexander Dennis	Guildford	Bus and coach
2	Aston Martin	Gaydon	Car
3	Bentley	Crewe	Car and engine
4	Caterham	Dartford	Car
5	Cummins	Darlington	Engine
6	Dennis Eagle	Warwick	CV, bus and coach
7	Euromotive	Hythe	Bus and coach
8	Ford	Bridgend, Dagenham and Southampton	CV, engine, bus and coach
9	Honda	Swindon	Car and engine
10	Jaguar	Castle Bromwich, Birmingham	Car
11	John Dennis Coachbuilders	Guildford	Bus and coach

Key	Manufacturer	Where	What
12	Land Rover	Solihull and Halewood	Car and CV
13	Leyland Trucks	Leyland	CV
14	Lotus	Norwich	Car
15	LTI	Coventry	Car
16	McLaren Automotive	Woking	Car
17	Mellor Coachcraft	Bolton	Bus and coach
18	MG Motor	Longbridge	Car
19	MINI	Oxford and Birmingham	Car and engine
20	Minibus Options	Whaley Bridge	Bus and coach
21	Morgan	Malvern	Car
22	Nissan	Sunderland	Car and engine

UK AUTOMOTIVE MANUFACTURING

Key	Manufacturer	Where	What
23	Optare	Leeds	Bus and coach
24	Plaxton	Scarborough	Bus and coach
25	Rolls-Royce	Goodwood	Car
26	Smith	Tyne and Wear	CV
27	Spyker	Coventry	Car
28	Tata	Coventry	Car
29	Toyota	Burnaston and Deeside	Car and engine
30	Vauxhall	Ellesmere Port and Luton	Bus, CV and coach
31	Warnerbus	Dunstable	Bus and coach



UK AUTOMOTIVE MANUFACTURING

Car production annual totals

Year	Production	% Change	Home market	% Change	% of total	Export market	% Change	% of total
2000	1,641,452	-8.8	578,462	-10.9	35.2	1,062,990	-7.5	64.8
2001	1,492,365	-9.1	598,151	3.4	40.1	894,214	-15.9	59.9
2002	1,629,934	9.2	582,484	-2.7	35.7	1,047,450	17.2	64.3
2003	1,657,558	1.7	513,798	-11.8	31.0	1,143,760	9.2	69.0
2004	1,647,246	-0.6	467,160	-9.1	28.4	1,180,086	3.1	71.6
2005	1,596,356	3.1	411,245	-11.9	25.8	1,185,111	0.4	74.2
2006	1,442,085	9.7	335,992	-18.3	23.3	1,106,093	-6.7	76.7
2007	1,534,567	6.4	349,108	3.9	22.7	1,185,459	7.2	77.3
2008	1,446,619	-5.7	318,033	-8.9	22.0	1,128,586	-4.8	78.0
2009	999,460	-30.9	237,226	-25.7	23.7	762,234	-32.5	76.3
2010	**1,270,444**	**27.1**	**309,024**	**30.3**	**24.3**	**961,420**	**26.1**	**75.7**

The UK is the fourth largest vehicle producer in Europe and is home to some of its most productive vehicle plants.

UK AUTOMOTIVE MANUFACTURING

CV production in the UK

Year	Production	% Change	Export market	% Change	% of total	Home market	% Change	% of total
2000	172,442	-19.3	76,181	19.6	44.2	96,261	-12.4	55.8
2001	192,873	-0.06	96,224	26.3	49.9	96,649	0.4	50.1
2002	191,267	11.8	114,235	18.7	59.7	77,032	-20.3	40.3
2003	188,871	-0.8	102,917	-9.9	54.5	85,954	11.6	45.5
2004	209,293	-1.3	128,107	24.5	61.2	81,186	-5.5	38.8
2005	206,756	10.8	130,276	1.7	63.0	76,480	-5.8	37.0
2006	207,707	-1.2	136,222	4.6	65.6	71,485	-6.5	34.4
2007	215,686	3.8	131,562	-3.4	61.0	84,124	17.7	39.0
2008	202,896	-5.9	125,611	-4.5	61.9	77,285	-8.1	38.1
2009	90,679	-55.3	66,454	-47.1	77.5	24,225	-68.7	22.5
2010	**123,019**	**35.7**	**85,547**	**28.7**	**69.5**	**37,472**	**54.7**	**30.5**

UK AUTOMOTIVE MANUFACTURING

Top five UK producers 2010

Make	Volume
Nissan	423,262
MINI	216,302
Land Rover	179,165
Honda	139,278
Toyota	137,054

Make	Volume
Vauxhall	77,194
Ford	28,270
Leyland Trucks	9,290
Land Rover	5,931
Alexander Dennis	2,003

Make	Model	Volume
Nissan	Qashqai	271,188
MINI	MINI	216,302
Vauxhall	Astra	102,665
Toyota	Avensis	72,740
Land Rover	Range Rover	72,002

Manufacturing sites

	2006	2007	2008	2009	2010
Bentley	9,386	10,014	7,675	3,596	**4,791**
BMW	217,000	367,000	371,269	362,300	**385,051**
Cummins	65,000	79,000	80,000	34,504	**43,525**
Ford (Bridgend)	671,202	758,581	704,181	683,340	**680,717**
Ford (Dagenham)	683,729	900,776	1,047,570	746,426	**959,480**
Honda	190,538	248,000	203,647	60,125	**136,658**
Nissan	212,046	119,000	112,829	108,955	**105,766**
Toyota	438,000	345,000	297,398	88,714	**114,254**
Total	2,826,901	3,167,371	3,164,569	2,053,456	**2,386,717**

UK AUTOMOTIVE MANUFACTURING

UK car and commercial vehicle production by model and manufacturer

CV production

Manufacturer	Model	Factory
Alexander Dennis	Enviro bus range	Guildford
Dennis Eagle	N and W truck range	Warwick
Ford	Transit van and minibus range	Southampton
Land Rover	Defender	Solihull
Leyland Trucks	The DAF, CF, LF and XF truck range	Leyland
Optare	Solo, Temp and Versa bus range	Leeds
Vauxhall	Trafic, Vivaro van and minibus range	Luton
Vauxhall/Opel	Astra	Ellesmere Port

Car production

Manufacturer	Model	Factory
Aston Martin	Vantage and DB9	Gaydon
Bentley	Continental and Mulsanne	Crewe
Caterham	Super 7	Dartford
Honda	Civic, CR-V and Jazz	Swindon
Jaguar	XJ, XF and XK	Castle Bromwich
Land Rover	Defender, Discovery, Evoque and Range Rover	Solihull
Land Rover	Freelander	Halewood
Lotus	Elise, Europa, Evora and Exige	Hethel
LTI	TX	Coventry
McLaren	MP4-12C	Woking
MG Motor UK	MG TF	Longbridge
MINI	MINI	Cowley, Oxford
Morgan	4/4, Aero, Plus4 and Roadster	Malvern
Nissan	Juke, Qashqai and Note/Tone	Sunderland
Rolls-Royce	Ghost and Phantom	Goodwood
Toyota	Auris and Avensis	Burnaston, Derby
Vauxhall/Opel	Astra	Ellesmere Port

UK AUTOMOTIVE MANUFACTURING

CV production

No	Manufacturer	Factory	Volume
1	Vauxhall	Ellesmere Port and Luton	77,194
2	Ford	Southampton	28,270
3	Leyland Trucks	Leyland	9,290
4	Land Rover	Solihull	5,931
5	Alexander Dennis	Guildford	2,003

SMMT's European National Type Approval (SENTA)

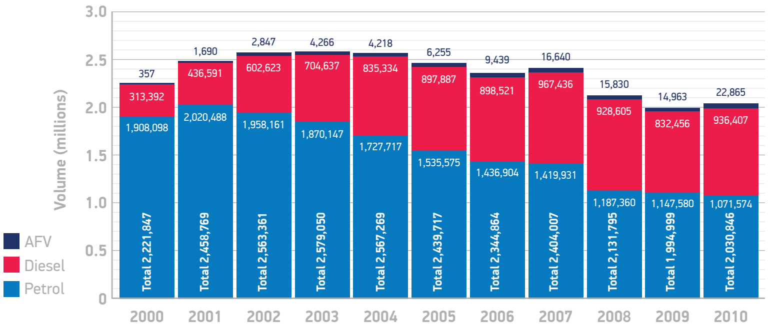
From 2010, Europe-wide legislation governing every aspect of a vehicle's design and production started to take effect, posing one of the biggest challenges to vehicle manufacturers and bodybuilders in the last 50 years.

The European Whole Vehicle Type Approval directive allows a vehicle of a particular type (model) to be approved for use across all EU member states without the need for further testing in each country. It applies to anyone involved in the building or part-building of buses, coaches, vans, trucks, trailers and some other special purpose vehicles such as motor caravans, trailer caravans, ambulances, hearses and wheelchair accessible vehicles and without it, a vehicle can't be registered or sold.

For more information on Type Approval visit **http://senta.smmt.co.uk**

NEW CAR REGISTRATIONS

Annual UK totals and best sellers



Top 10 in 2010 (best sellers)

	Make	Volume
1	Ford Fiesta	103,013
2	Vauxhall Astra	80,646
3	Ford Focus	77,804
4	Vauxhall Corsa	77,398
5	Volkswagen Golf	58,116
6	Volkswagen Polo	45,517
7	Peugeot 207	42,185
8	BMW 3 Series	42,020
9	MINI	41,883
10	Nissan Qashqai	39,048

Top 10 diesels (best sellers)

	Make	Volume
1	Volkswagen Golf	41,895
2	Ford Focus	30,673
3	Vauxhall Insignia	30,570
4	BMW 3 Series	30,417
5	Ford Mondeo	27,704
6	Ford Fiesta	27,554
7	Nissan Qashqai	25,732
8	BMW 1 Series	23,485
9	Volkswagen Passat	21,226
10	Audi A3	20,824

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Reg	2,221,647	2,458,769	2,563,631	2,579,050	2,567,269	2,439,717	2,344,894	2,404,007	2,131,795	1,994,999	2,030,846
Change %	1.1	10.7	4.3	0.6	-0.5	-0.5	-3.9	2.5	-11.3	-6.4	1.8

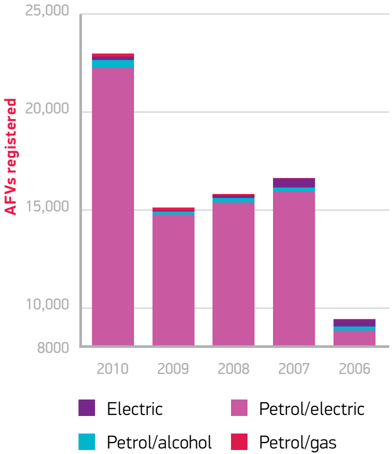
AFV REGISTRATIONS

Alternatively-Fuelled Vehicle (AFV) registrations by fuel type

AFV registrations

Fuel Type	2010	2009	2008	2007	2006
Electric	167	55	179	397	298
Petrol/alcohol	429	140	240	269	145
Petrol/electric	22,148	14,645	15,385	15,971	8,957
Petrol/gas	121	156	26	3	39

AFV registrations by fuel type



Eco innovations

With 3.4 million jobs in eco-industries and a growing demand to meet the environmental challenges of the future, manufacturers have designed various eco-innovations to help drivers save fuel and CO_2:

Stop-start technologies automatically cut the engine when a vehicle is stationary. The engine is re-started by releasing the brake or depressing the clutch.

Tyre pressure monitoring systems measure the pressure of each of the tyres and will give a warning through the dashboard display if they become under-inflated.

Gear shift indicators show the driver the optimum time to change gear (up and down) while driving.

Low rolling resistance tyres are designed to improve the fuel efficiency of a vehicle by minimising the energy wasted as heat when the tyre rolls down the road.

Manufacturers are committed to low carbon growth and to driving forward sustainable initiatives within the automotive industry.

REGISTRATIONS BY SALES TYPE

Registrations by sales type

Fleet, business and private registrations

	2006	2007	2008	2009	2010
Fleet	1,156,274	1,194,811	1,109,963	882,415	973,233
Business	154,868	163,389	129,573	98,280	99,608
Private	1,033,722	1,045,807	892,259	1,014,304	958,005
Total	**2,344,864**	**2,404,007**	**2,131,795**	**1,994,999**	**2,030,846**

Top 10 fleet and business registrations

Make	Volume
Vauxhall Astra	61,463
Ford Focus	56,569
Ford Fiesta	50,160
Volkswagen Golf	40,614
Vauxhall Corsa	43,859
Vauxhall Insignia	31,297
BMW 3 Series	28,745
Nissan Qashqai	27,539
Ford Mondeo	27,096
Vauxhall Zafira	26,880
Total	**1,072,841**

NEW CAR REGISTRATIONS

Segment totals and market share

Segment	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Mini	52,203	47,899	40,370	38,940	36,171	27,195	23,297	21,512	28,094	68,098	53,388
%	2.3	1.9	1.6	1.5	1.4	1.1	1.0	0.9	1.3	3.4	2.6
Supermini	688,686	773,995	831,264	873,690	839,604	732,756	753,872	770,601	712,975	742,153	739,615
%	31.0	31.5	32.4	3.9	32.7	30.0	32.2	32.1	33.1	37.2	36.4
Lower Medium	661,502	741,817	771,319	719,164	729,690	761,328	694,428	722,012	618,848	530,849	539,403
%	29.8	30.2	30.1	27.9	28.4	31.2	29.7	30.0	29.0	26.6	26.6
Upper Medium	476,860	507,736	505,026	480,220	459,061	427,278	393,999	386,414	340,796	283,552	264,251
%	21.5	20.7	19.7	18.6	17.9	17.5	16.8	16.1	16.0	14.2	13.0
Executive	104,583	109,433	114,382	118,579	109,667	111,112	100,339	104,468	98,572	90,114	99,079
%	4.7	4.5	4.5	4.6	4.3	4.6	4.3	4.3	4.6	4.5	4.9
Luxury	11,406	11,053	10,193	13,500	13,620	11,678	13,227	13,120	9,977	6,547	8,140
%	0.5	0.4	0.4	0.5	0.5	0.5	0.6	0.5	0.5	0.3	0.4
Sports	67,208	65,358	60,108	65,178	73,940	64,681	65,047	65,731	50,256	46,467	46,209
%	3.0	2.7	2.3	2.5	2.9	2.7	2.8	2.7	2.4	2.3	2.3
4x4/SUV	99,212	121,556	137,582	159,144	179,439	187,392	175,805	176,290	136,525	132,472	156,552
%	4.5	4.9	5.4	6.2	7.0	7.7	7.5	7.3	6.4	6.6	7.7
MPV	59,987	79,922	93,387	110,635	126,077	116,297	124,850	143,859	135,752	94,747	124,209
%	2.7	3.3	3.6	4.3	4.9	4.8	5.3	6.0	6.4	4.8	6.1
Total	**2,221,647**	**2,458,769**	**2,563,631**	**2,579,050**	**2,567,269**	**2,439,717**	**2,344,864**	**2,404,007**	**2,131,795**	**1,994,999**	**2,030,846**

NEW CAR REGISTRATIONS

Best sellers by segment

Model	Registrations	Market Share
Hyundai i10	23,565	44.1%
smart fortwo coupé	6,214	11.6%
Suzuki Alto	5,755	10.8%
Nissan Pixo	5,031	9.4%
Vauxhall Agila	4,825	9.0%

Segment total – 53,388
Diesel share – 4.5%

Model	Registrations	Market Share
Ford Fiesta	103,013	13.9%
Vauxhall Corsa	77,398	10.5%
Volkswagen Polo	45,517	6.2%
Peugeot 207	42,185	5.7%
MINI	41,883	5.7%

Segment total – 739,615
Diesel share – 18.0%

Model	Registrations	Market Share
Vauxhall Astra	80,646	15.0%
Ford Focus	77,804	14.4%
Volkswagen Golf	58,116	10.8%
Nissan Qashqai	39,048	7.2%
Audi A3	33,395	6.2%

Segment total – 539,403
Diesel share – 51.5%

NEW CAR REGISTRATIONS

Best sellers by segment

Model	Registrations	Market Share
BMW 3 Series	42,020	15.9%
Vauxhall Insignia	37,281	14.1%
Ford Mondeo	30,115	11.4%
Audi A4	21,729	8.2%
Volkswagen Passat	21,721	8.2%

Segment total – 264,251
Diesel share – 77.5%

Model	Registrations	Market Share
Mercedes E-Class	23,133	23.3%
Mercedes C-Class	22,823	23.0%
BMW 5 Series	16,121	16.3%
Jaguar XF	12,688	12.8%
Audi A6	10,531	10.6%

Segment total – 99,079
Diesel share – 78.4%

Model	Registrations	Market Share
Jaguar XJ	1,827	22.4%
Mercedes S-Class	1,815	22.3%
BMW 7 Series	1,443	17.7%
Bentley Continental	917	11.3%
Audi A8	822	10.1%

Segment total – 8,140
Diesel share – 63.5%

NEW CAR REGISTRATIONS

Best sellers by segment

Model	Registrations	Market Share
Volkswagen Scirocco	8,323	18.0%
Audi TT	7,648	16.6%
Mazda MX-5	5,157	11.2%
Nissan Z Series	2,502	5.4%
Volkswagen EOS	2,462	5.3%

Segment total – 46,209
Diesel share – 22.6%

Model	Registrations	Market Share
Land Rover Freelander	15,562	9.9%
Honda CR-V	11,729	7.5%
Ford Kuga	11,527	7.4%
Range Rover Sport	8,508	5.4%
Land Rover Discovery	8,295	5.3%

Segment total – 156,552
Diesel share – 87.7%

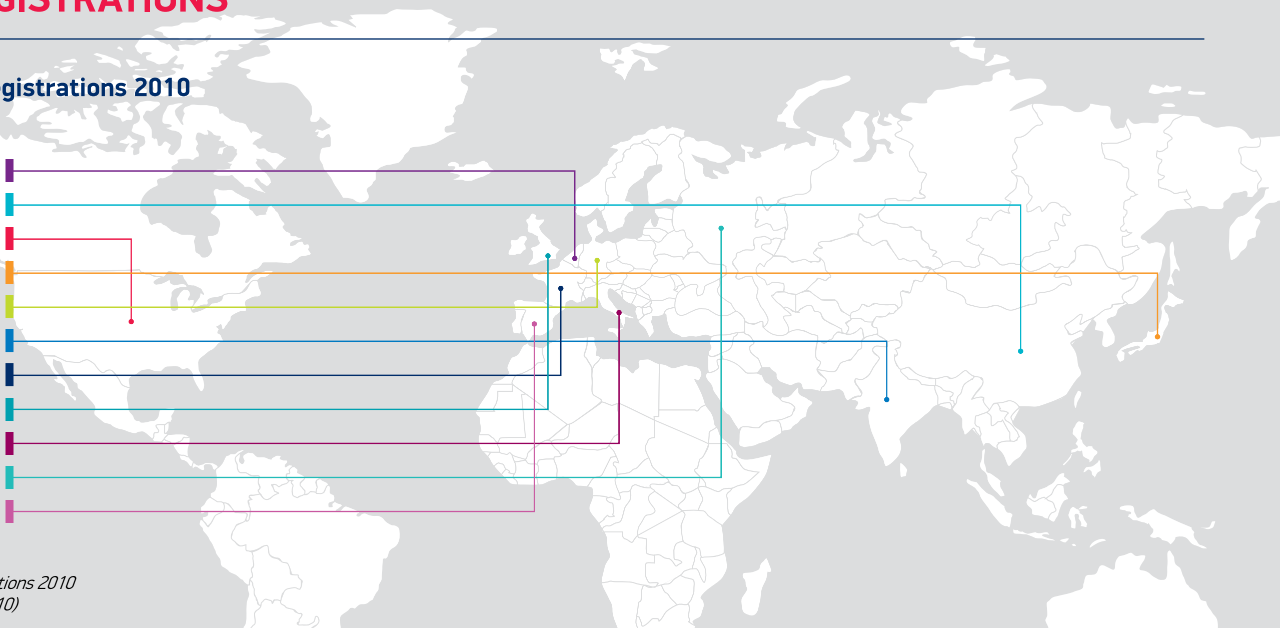
Model	Registrations	Market Share
Vauxhall Zafira	30,360	24.4%
Renault Scenic	19,011	15.3%
Ford S Max	12,276	9.9%
Ford C Max	8,357	6.7%
Ford Galaxy	7,533	6.1%

Segment total – 124,209
Diesel share – 70.5%

NEW CAR REGISTRATIONS

Overseas new car registrations 2010

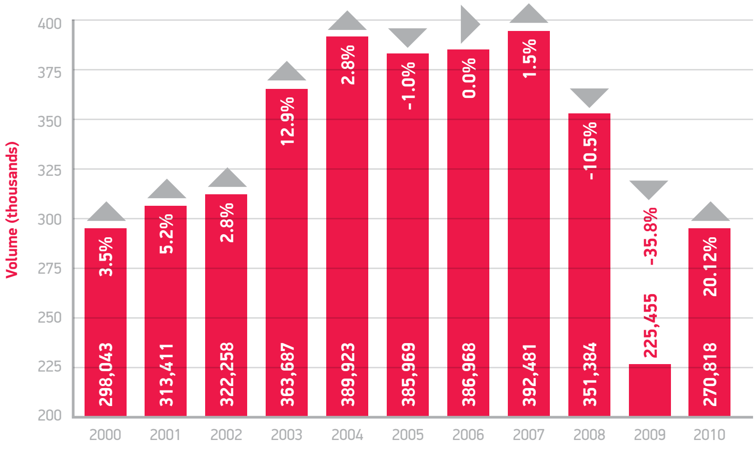
Country	Volume
EU27[1]	11,567,336
China[2]	11,471,200
USA[2]	5,638,400
Japan[2]	4,798,400
Germany[1]	2,916,260
India[2]	2,795,088
France[1]	2,251,669
UK[1]	2,030,846
Italy[1]	1,960,282
Russia[2]	1,757,100
Spain[1]	982,015



Sources:
1: ACEA passenger car registrations 2010
2: Global Insight (December 2010)

COMMERCIAL VEHICLE REGISTRATIONS

Annual UK totals



Annual registrations by segment

Year	LCVs up 3.5t	Rigids	Artics	Bus and coach	All CVs	Year on year % change
2000	239,482	35,517	18,663	4,381	**298,043**	3.5%
2001	254,075	37,279	18,294	3,763	**313,411**	5.2%
2002	266,346	35,135	16,785	3,992	**322,258**	2.8%
2003	303,755	36,788	18,802	4,342	**363,687**	12.9%
2004	329,599	37,461	18,851	4,012	**389,923**	2.8%
2005	322,930	38,957	19,884	4,198	**385,969**	-1.0%
2006	327,162	36,973	18,601	4,232	**386,968**	0.0%
2007	337,741	35,614	15,133	3,993	**392,481**	1.5%
2008	289,463	38,651	18,759	4,511	**351,384**	-10.5%
2009	186,386	24,973	9,773	4,323	**225,455**	-35.8%
2010	222,915	34,458	10,219	3,226	270,818	20.12%

COMMERCIAL VEHICLE REGISTRATIONS

Bus and coach

Bus and coach registrations

Year	Registrations
2000	4,381
2001	3,763
2002	3,992
2003	4,342
2004	4,012
2005	4,198
2006	4,232
2007	3,993
2008	4,511
2009	4,323
2010	3,226

Production – UK bus, coach and minibus makers

Manufacturer	Factory
Alexander Dennis	Guildford
Dennis Eagle	Warwick
Euromotive	Hythe
Ford	Southampton
John Dennis Coachbuilders	Guildford
Mellor Coachcraft	Bolton
Minibus Options	Whaley Bridge
Optare	Leeds
Plaxton	Scarborough
Vauxhall	Luton
Warnerbus	Dunstable

VEHICLES IN USE

Used car sales in GB 2005 – 2010

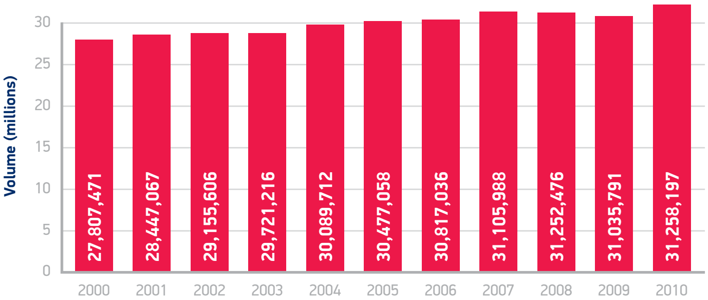
Year	Volume
2005	7,576,724
2006	7,584,466
2007	7,487,544
2008	7,186,286
2009	6,798,864
2010	6,797,789

Age of cars on the road

In 2009, the average age of a UK car was seven years.

Years Old	Year	Volume
Less than three	2010 - 2008	6,089,224
Three to six	2007 - 2005	7,030,015
Six to nine	2004 - 2002	7,421,922
Nine to 12	2001 - 1999	5,775,294
More than 12	Pre-1999	4,941,742
Total		**31,258,197**

Annual total of cars on UK roads



VEHICLES IN USE

Colours of cars on the road 2000 v 2010

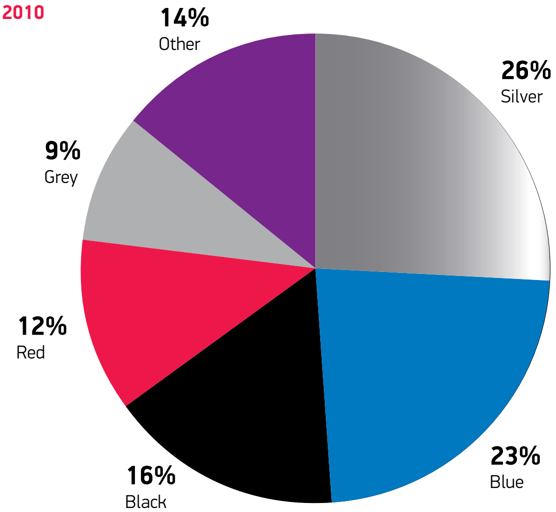
Top five 2010

Colour	2010	% of Parc
Silver	7,985,690	26%
Blue	7,087,017	23%
Black	5,047,874	16%
Red	3,769,024	12%
Grey	2,932,946	9%
Other	4,435,646	14%

Top five in 2000

Colour	2000	% of Parc
Blue	6,764,241	25%
Red	6,576,979	24%
Silver	3,162,213	12%
White	3,136,043	12%
Green	2,929,725	11%
Other	5,238,270	14%

Top five in 2010



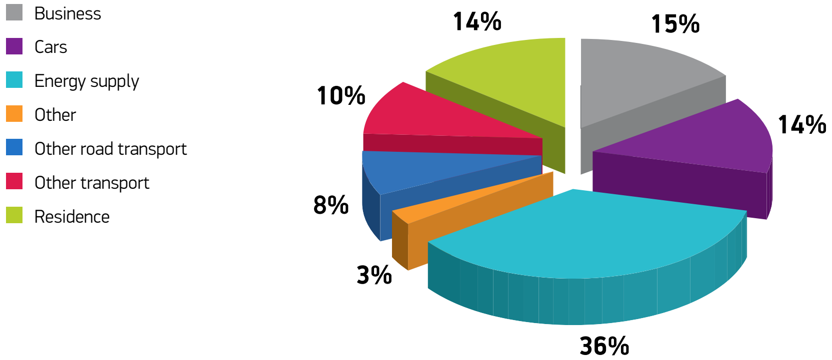
VEHICLES IN USE

Annual totals of commercial vehicles on UK roads 2000 – 2010

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
LCVs up to 3.5t	2,767,750	2,824,323	2,898,250	2,979,759	3,109,744	3,227,461	3,420,620	3,545,724	3,600,116	3,534,664	3,566,460
Trucks over 3.5t	574,456	570,837	579,465	587,862	580,718	586,129	595,266	598,447	589,129	558,076	563,295
Buses and coaches	98,312	98,224	100,099	101,069	102,978	103,175	102,101	103,817	95,961	88,779	90,700
Total CV	**3,440,518**	**3,493,384**	**3,577,814**	**3,668,690**	**3,793,440**	**3,916,765**	**4,117,987**	**4,247,988**	**4,285,206**	**4,181,519**	**4,220,455**

**2010 estimates*

2009 UK CO_2 emissions by source



UK production site performance

Waste to landfill (kg per vehicle produced*)

Years	Waste to landfill (kg) per vehicle produced	% change
2005	14.5	-26.8%
2006	17.0	14.7%
2007	12.8	-32.8%
2008	11.9	-7.6%
2009	10.8	-10.2%

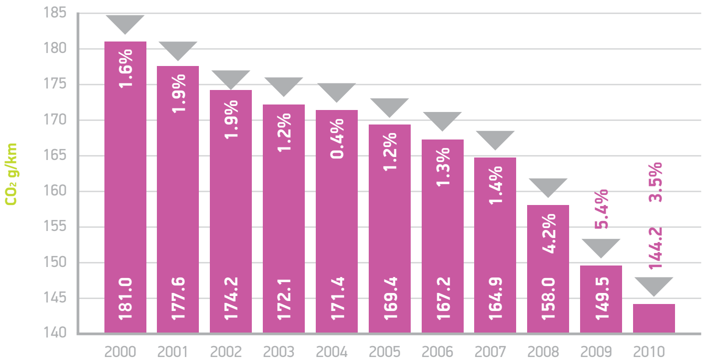
Water use (M^3 per vehicle produced*)

Years	M^3 of water per vehicle produced	% change
2005	3.2	-6.3%
2006	3.3	3.1%
2007	3.0	-9.1%
2008	2.9	-3.4%
2009	3.5	17.1%

**Source: SMMT 11th Annual Sustainability Report*

ENVIRONMENTAL PERFORMANCE

Average new car CO_2 emissions



In 2008, new EU legislation on emissions targets for European vehicle manufacturers set revised targets of 130g CO_2/km to be achieved by 2015 and 95g CO_2/km to be achieved by 2020, subject to assessment.

New car market by VED band

12 month Vehicle Exercise Duty rates for cars registered since 1 March 2001

VED band	Volume	Market share (%)			
	2010	2010	2009	2000	All on road
A (up to 100g/km)	**37,346**	1.8%	0.9%	0.0%	0.2%
B (101-110g/km)	**139,925**	6.9%	5.6%	0.0%	1.5%
C (111-120g/km)	**335,822**	16.5%	13.9%	0.1%	3.7%
D (121-130g/km)	**261,761**	12.9%	7.2%	0.7%	3.5%
E (131-140g/km)	**371,726**	18.3%	19.7%	7.3%	10.8%
F (141-150g/km)	**224,738**	11.1%	13.0%	11.1%	12.8%
G (151-165g/km)	**306,180**	15.1%	18.2%	23.8%	21.9%
H (166-175g/km)	**80,482**	4.0%	5.6%	8.9%	10.3%
I (176-185g/km)	**99,288**	4.9%	5.5%	13.8%	9.0%
J (186-200g/km)	**77,056**	3.8%	4.4%	11.1%	9.4%
K (201-225g/km)	**45,371**	2.2%	3.0%	11.9%	8.4%
L (226-255g/km)	**30,131**	1.5%	1.3%	6.4%	4.8%
M (over 255g/km)	**21,020**	1.0%	1.5%	4.8%	3.8%

For cars registered since 2001, Vehicle Excise Duty (VED or 'road tax') is based on tailpipe CO_2 emissions, with the amount payable scaling with the level of emissions.

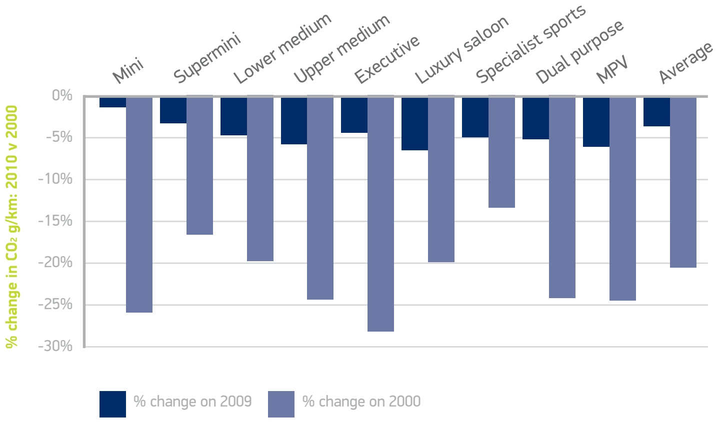
Lowest emitters

Top 10 lowest CO_2 emitting models 2010

Rank	Model	Fuel type	CO_2 g/km
=1	Mitsubishi I-MiEV	EV	0
=1	smart fortwo	EV	0
=1	Tesla Roadster	EV	0
4	Toyota Prius	PHV	59
5	smart fortwo	Diesel	86
=6	Škoda Fabia	Diesel	89
=6	Toyota Auris	PEV	89
=6	Toyota Prius	PEV	89
9	VW Polo	Diesel	91
=10	Fiat 500	Petrol	92
=10	SEAT Ibiza	Diesel	92

Key: EV – Electric Vehicle
PEV – Plug-In Electric Vehicle
PHV – Plug-In Hybrid Vehicle

Change in average new car CO_2 g/km emissions by segment (2010 v 2000)



Electric Vehicles (EVs) in the automotive industry

Electric Vehicle (EV) is the umbrella term for any vehicle that is powered, in part or in full, by a battery that can be directly plugged into mains electricity. The term EV includes Pure-Electric Vehicles, Plug-In Hybrid Vehicles and Extended-Range Electric Vehicles.

Pure-Electric Vehicles (Pure EVs) – These are wholly electric vehicles operated by a battery. Most Pure-Electric Vehicles have a range of up to 100 miles.

Plug-In Hybrid Vehicles (PHVs) – These are vehicles which have a battery range in excess of 10 miles, after which they revert to hybrid capability, using battery and Internal Combustion Engine (ICE) power for propulsion.

Extended-Range Electric Vehicles (E-REVs) – These vehicles are similar to pure EVs, but they have a shorter battery range of around 40 miles which is extended by an ICE on-board generator, providing additional mileage capability. Unlike PHVs, which can use electric or full hybrid for propulsion, E-REVs always use electricity for propulsion.

On 1 January 2011, the UK government announced that motorists will be entitled to 25% (up to £5,000) off the list price of an electric, plug-in hybrid or hydrogen fuel cell car, providing it emits less than 75g/km of CO_2 and meets safety, reliability, performance and warranty standards set by the Office for Low Emissions Vehicles (OLEV) in consultation with industry.

Eligible vehicles for the Plug-In Car Grant

Make and model	Available in the UK
Mitsubishi i-MiEV	On sale
smart fortwo electric drive	On sale
Peugeot iOn	On sale
Nissan LEAF	On sale
Citroën C-Zero	On sale
Tata Vista	Summer 2011
Vauxhall Ampera	Spring 2012
Toyota Prius Plug-In Hybrid	Early 2012
Chevrolet Volt	Early 2012

More vehicles will be added to the eligibility list as OLEV receives submissions from vehicle manufacturers.

Source: SMMT Electric Car Guide 2010
Department for Transport, Plug-In-Car Grant:
www.dft.gov.uk/pgr/sustainable/olev

Sustainable manufacturing

End-of-Life-Vehicles (ELV)

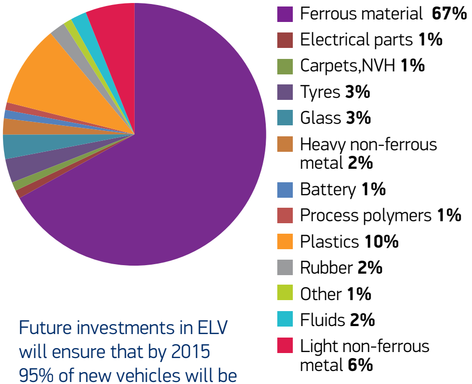
The ELV directive aims to reduce the amount of waste from vehicles (cars and light goods vehicles) when they are finally scrapped.

There are approximately 1,800 Authorised Treatment Facilities (ATFs) in the UK and environmental performance statistics are published biennially by the Department of Business, Innovation and Skills and in SMMT's Annual Sustainability Report.

In the last five years, vehicle manufacturers' ATFs have exceeded European targets.

- In 2008 the UK automotive industry achieved a recovery rate or more than 85%, with 67,477 tonnes (84.2%) more material recycled than in 2007.
- The average age of a car at scrappage has decreased 7% in the last six years to 13.2 years. Vans are worked harder and are scrapped slightly earlier at 12.5 years.

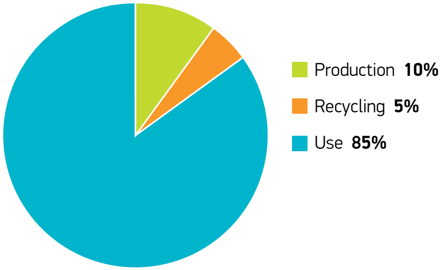
Average material breakdown



Future investments in ELV will ensure that by 2015 95% of new vehicles will be fully recyclable.*

**Source: SMMT 11th Annual Sustainability Report*

Manufacturing process lifecycle CO_2 emissions (%)



New car life cycle CO_2

Improvements in vehicle production techniques mean that only 10% of a vehicle's lifetime CO_2 emissions come from the manufacturing process.

New car and van CO_2 legislation

Industry has made significant improvements to CO_2 emission levels in recent years and recognises its responsibility to deliver environmental improvements.

Constant innovation by vehicle manufacturers has seen CO_2 emission levels drop dramatically and in 2010, average emissions for all new cars fell 3.5% on 2009 figures to 144.2g/km CO_2, 36.8g/km or 20.3% below the level in 2000.

New car CO_2 regulation

In 2008, legislation committing vehicle manufacturers to specific CO_2 emission targets for new car registrations was passed. Subject to their individual targets, vehicle manufacturers will have to comply with new car average CO_2 emission targets of 130g/km CO_2 by 2015 and 95g/km CO_2 by 2020.

The legislation sets out an exacting programme for car manufacturers with 65% of new cars averaging the 130g/km target by 2012, 75% by 2013, 85% by 2014 and 100% by 2015.

Van CO_2 regulation

In February 2011, the European Commission agreed an initial CO_2/km emissions target for vans and LCVs.

From 2017, vans and LCVs will be required to meet an emissions target of 175g/km CO_2 (phased in annual compliance levels of 70%, 75% and 80% respectively between 2014-2016), with all manufacturers reaching the 100% target emissions levels from 2017 onwards.

Manufacturers who fail to reach the targets will be fined €95 per additional gram of CO_2 emitted, for every car registered across Europe.

For more detail on how the automotive industry is reducing its environmental impact, visit **www.smmt.co.uk**.

The Automotive Council

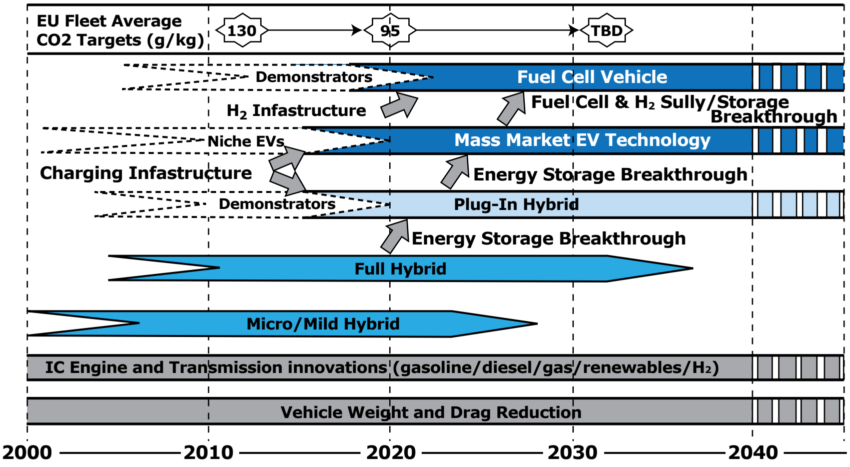
The Automotive Council was established in 2009, as a partnership between industry and government, to consider the strategic development of the UK automotive industry.

The remit of the Automotive Council is to position the UK as a compelling investment proposition, transforming the business environment in the UK and enabling it to secure funding for the research and development of new technology, collaborative research and testing facilities.

Its role is to promote investment for upgrades to existing research and manufacturing facilities in the UK by co-ordinating nation-wide activity and supporting key initiatives in the UK's automotive industry, including:

- The Technology Group – strategic support for automotive research and development, through the New Automotive Innovation and Growth Team's technology roadmap.
- The Supply Chain Group – feeding into the Automotive Council and focused on the development of a strong automotive supply base in the UK.

New Automotive Innovation and Growth Team Road Map (NAIGT)



Vehicle security and road safety

Vehicle crime in the UK (2000 – 2010)*

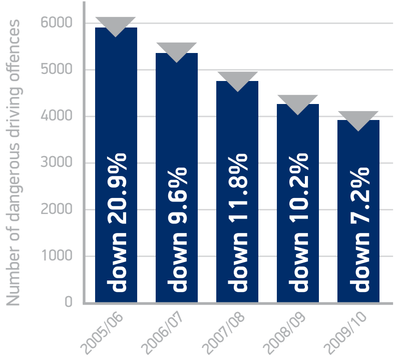
Year	Theft from vehicles	Theft of vehicles
2000/01	669,232	374,686
2001/02	629,651	338,796
2002/03	663,679	306,947
2003/04	603,256	280,288
2004/05	500,360	231,323
2005/06	507,239	203,239
2006/07	502,651	182,464
2007/08	432,374	159,675
2008/09	396,963	137,511
2009/10	**339,140**	**109,817**

Killed or seriously injured casualties by road user type over the last five years (2005 – 2010)

Year	Number of dangerous driving offences on UK roads
2005/06	5,923
2006/07	5,353
2007/08	4,720
2008/09	4,238
2009/10	3,926

Source: DfT Road Casualties Great Britain 2009

Number of dangerous driving offences on UK roads (2005 – 2010)



Source: British Crime Survey 2010

Road safety and accident prevention

RoadSafe (www.roadsafe.com)

RoadSafe is a road safety partnership that brings together the motor industry and related companies, traffic engineers, the police and road safety professionals. Its mission is to reduce road deaths and injuries by sharing knowledge and encouraging innovation.

In 2010, the automotive industry won a special Prince Michael International Road Safety Award, for its contribution to road safety over the last 20 years.

The number of people killed and seriously injured on UK roads has fallen considerably due to huge investments in the research and development of safety products.

Since 1989, all road deaths have declined by 58% and car occupant deaths, which make up a significant proportion of road fatalities, have fallen by 56%.

The Department for Transport largely attributes this to improved vehicle safety.

Killed or seriously injured casualties by road user type over the last five years (2006 – 2010)

	2006	2007	2008	2009	2010*
Pedestrians	7,051	6,924	6,642	6,045	5,710
Pedal cyclists	2,442	2,564	2,565	2,710	2,770
Motorcycles (users and passengers)	6,484	6,737	6,049	5,822	5,450
Car users	14,254	12,967	11,968	11,112	10,110
Bus/coach users	426	455	432	370	No estimate available
Other road users	1,188	1,073	916	853	No estimate available
All road users	**31,845**	**30,720**	**28,572**	**26,912**	**25,250**

Source: RoadSafe: Saving lives; 20 years of automotive innovation

ROADSAFE®

**DfT: Reported Road Casualties in Great Britain Quarterly Provisional Estimates Q3 2010.*

Fuel costs and Vehicle Exercise Duty (VED)

Average annual fuel prices over 10 years

Year	Fuel cost (p)		All tax as % of total	
	Unleaded	Diesel		
2001	75.7	77.8	76.1%	74.4%
2002	73.2	75.5	77.5%	75.6%
2003	76.0	77.9	75.6%	74.1%
2004	80.9	82.5	73.1%	72.0%
2005	87.2	91.3	68.9%	66.5%
2006	92.0	95.7	66.2%	64.2%
2007	95.0	97.4	66.3%	65.0%
2008	107.5	118.1	61.7%	57.5%
2009	108.3	109.9	65.9%	65.1%
2010	116.6	118.8	74.2%	74.5%

Vehicle CO_2 emission bands

Band/g/km CO_2 emissions	Standard Rate (£)*			First Year Rate (£)
	2009-2010	2010-2011	2011-2012	2011-2012
A (up to 100g/km)	0	0	0	0
B (101-110g/km)	35	20	20	0
C (111-120g/km)	35	30	35	0
D (121-130g/km)	120	90	90	0
E (131-140g/km)	120	110	110	110
F (141-150g/km)	125	125	125	125
G (151-165g/km)	150	155	155	155
H (166-175g/km)	175	180	180	250
I (176-185g/km)	175	200	200	300
J (186-200g/km)	215	235	235	425
K (201-225g/km)	215	245	245	550
L (226-255g/km)	405	425	425	750
M (over 255g/km)	405	435	435	950

Source: Direct Gov

Skills

- The UK is a key player in the global automotive industry and a strong skills base will enable it to remain competitive within a global market.
- Automotive companies continue to invest heavily in training programmes to increase skills at all levels.
- SMMT is engaged with skills providers, funding agencies and government to ensure training and skills provision is accessible, properly funded, and suitably targeted.
- The skills agenda should be linked to the future technology agenda, identifying trends to appropriate skill sets.

The Institute of the Motor Industry (IMI)

The IMI is the professional association for individuals working in the motor industry. The Institute is the Sector Skills Council for the automotive retail industry and the governing body for the Automotive Technician Accreditation (ATA) scheme.

To find out more about the IMI, visit **www.motor.org.uk**

To find out more about industry events, news and careers within the automotive sector, visit **www.autocity.org.uk**

Automotive outreach on careers and skills

To highlight and promote manufacturing excellence in the UK and to challenge perceptions of an outdated industry sector, government has launched an initiative, to encourage young people in particular to careers in manufacturing. As part of the initiative, there will be a nationwide roll-out of activities to promote manufacturing, starting with the automotive sector and extending to other industries from 2012 and beyond.

In 2011 the scheme, supported by the work of the Automotive Council, automotive companies across the UK open their doors and invite young people to see behind the scenes of some of the world's most high tech and productive manufacturing plants.

To find out how to be involved, visit **www.automotivecouncil.co.uk**

Market segmentation

Glossary of terms

SMMT segmentation

A Mini eg Hyundai i10
B Supermini eg Ford Fiesta
C Lower Medium eg Vauxhall Astra
D Upper Medium eg BMW 3 Series
E Executive eg Mercedes E-Class
F Luxury Saloon eg Jaguar XJ
G Specialist Sports eg Volkswagen Scirocco
H Dual Purpose (4x4/SUV) eg Land Rover Freelander
I Multi-Purpose Vehicle eg Vauxhall Zafira

Segment A – Mini

- Normally less than 1.0cc
- Bodystyle ‘miniature’
- Normally two-door
- Length normally not exceeding 3050mm (10ft)

Segment B – Supermini

- Normally between 1.0 – 1.4cc
- Bodystyle bigger than mini
- Length normally not exceeding 3745mm (12.5ft)
- Performance greater than mini
- More variety of trims per range

Segment C – Lower Medium

- Normally between 1.3 – 2.0cc
- Length under 4230mm (14 ft)

Segment D – Upper Medium

- Normally between 1.6 – 2.8cc
- Length normally under 4470mm (14.9 ft)

Segment E – Executive

- Normally between 2.0 – 3.5cc
- Bodystyle generally bigger than upper medium
- Normally four-door
- Length normally under 4800mm (16 ft)
- More luxuriously appointed

Segment F – Luxury Saloon

- Normally upward from 3.5cc
- Most luxurious available

Segment G – Specialist Sports

- Sports coupé
- Sports saloons
- Traditional sports

Segment H – Dual Purpose (4x4/SUV)

- 4x4 off road

Segment I – Multi-Purpose Vehicle (MPV)

- 4x2 or 4x4 estates with a seating capacity of up to eight people

Segment definition

Fleet

If the vehicle is being sold to/registered for a company that operates a fleet of 25 or more vehicles, it should be designated a fleet sale. This includes dealer demonstrators and motability-leased vehicles.

Business

If the vehicle is being sold to/registered for a company that operates up to 24 vehicles, it should be designated a business sale. This includes dealer demonstrators.

Private

If the vehicle is being sold primarily for the personal use of a private individual, it should be designated a private sale.

SMMT companies

Motor Codes

MOTOR CODES

Peace of mind for motorists

Motor Codes Ltd was established by the motor industry to act as the self-regulatory body for the automotive sector and is a wholly-owned subsidiary of the Society of Motor Manufacturers and Traders.

Motor Codes is responsible for operating three automotive codes:

- The Motor Industry Code of Practice for New Cars.
- The Motor Industry Code of Practice for Service and Repair.
- The Motor Industry Code of Practice for Vehicle Warranty Products.

Key features for motorists:

- Free advice line: **0800 692 0825**.
- Free conciliation and low cost, legally binding arbitration.
- Garage search facility.
- Garage survey.
- Free MOT and service reminder.
- Individual garage profiles and customer ratings.

For more information, visit **www.motorcodes.co.uk**

Industry Forum

The Industry Forum programme delivers 'learning by doing' training, teaching companies practical skills to help reduce waste, improve productivity and lower costs throughout the supply chain **www.industryforum.co.uk**.

SMMT publications and useful links

Act on CO_2
http://actonco2.direct.gov.uk/home.html

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

Automotive Council
www.automotivecouncil.co.uk/

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

Council of the European Union
http://europa.eu/institutions/inst/council/index_en.htm

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

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

European Commission
http://ec.europa.eu/index_en.htm

European Parliament
www.europarl.europa.eu/news/public/default_en.htm

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

Institute of Advanced Motorists (IAM)
www.iam.org.uk/

Motor Codes
www.motorcodes.co.uk/

Road Haulage Association
www.rha.uk.net/

RoadSafe
www.roadsafe.com/

SMMT publications

New car CO_2 Report 2011
www.smmt.co.uk/shop/new-car-co2-report-mar-2011/

Electric Car Guide 2010
www.smmt.co.uk/shop/electric-car-guide-2010/

11th Annual Sustainability Report
www.smmt.co.uk/shop/eleventh-sustainability-report/

About SMMT

The Society of Motor Manufacturers and Traders (SMMT) is one of the largest and most influential trade associations in the UK. It supports the interests of the UK automotive industry at home and abroad, promoting a united position to government, stakeholders and the media.

As a membership organisation, SMMT represents a significant number of companies in the UK, providing them with a principal 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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