



SMMT MOTOR INDUSTRY FACTS 2016

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 more than 650 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.smmmt.co.uk/memberservices** or e-mail **membership@smmmt.co.uk**



CONTENTS

UK AUTOMOTIVE AT A GLANCE 4-5

UK AUTOMOTIVE INDUSTRY 6

Investment 6

Supply chain 7

UK automotive employment 8

UK automotive: background 9

MANUFACTURING 10

Global automotive manufacturing 11

UK car manufacturing 12

UK car exports 13

Map: UK automotive manufacturing sites 14-16

Commercial vehicles and engines 17

REGISTRATIONS 18

Cars by colour 19

Private, fleet and business 20

Car registrations by fuel type and segment 21

Top five cars by segment 22-24

Commercial vehicle registrations 25

Global new car registrations 26

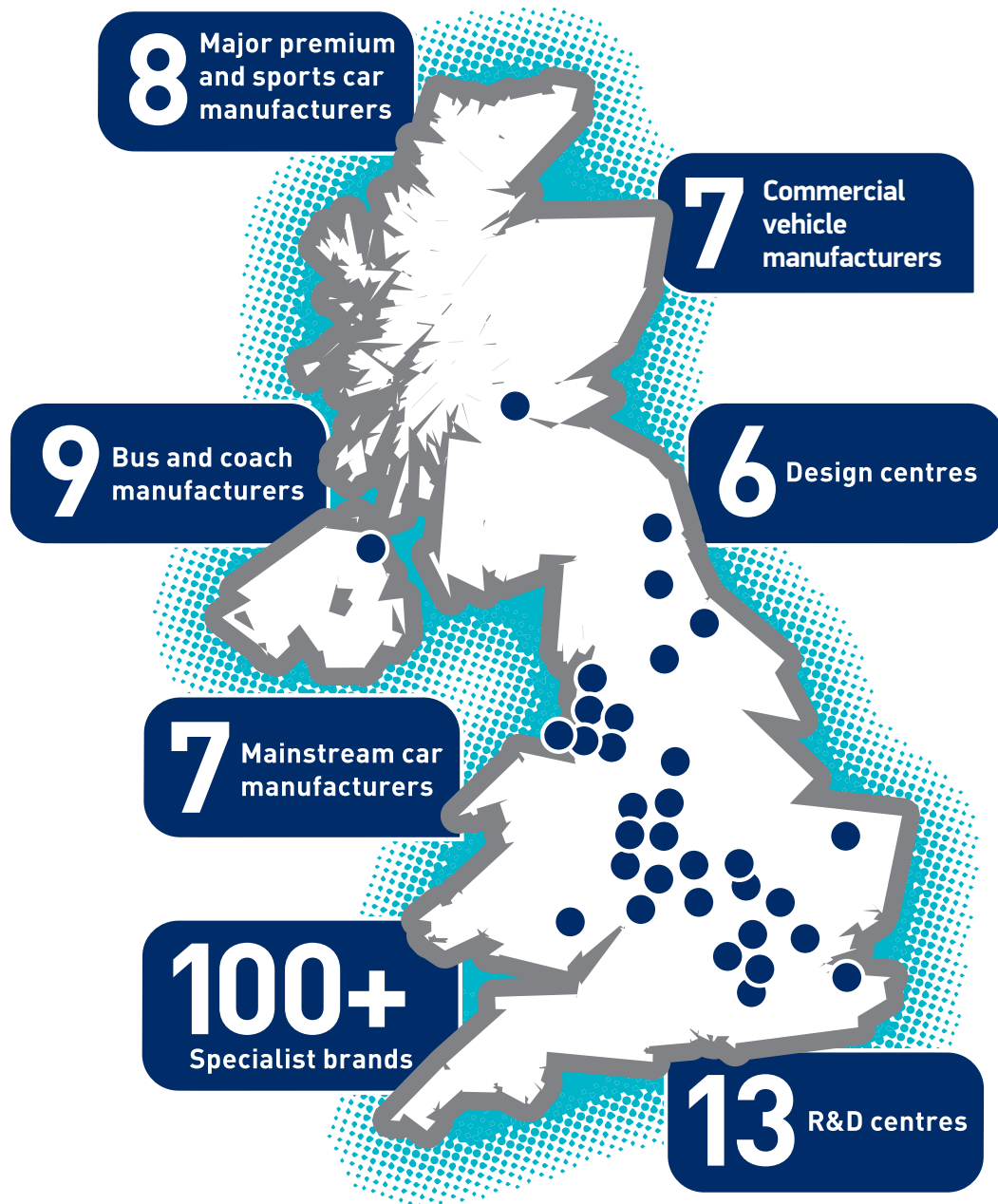
UK AUTOMOTIVE AFTERMARKET 27

VEHICLES ON THE ROAD 28-29

ENVIRONMENT AND AIR QUALITY 30-31

CONNECTED CARS 32

SMMT SUBSIDIARIES AND PARTNERSHIPS 33



£71.6 billion

UK automotive turnover

2,633,503

New cars registered in 2015

100+

Countries importing UK-built vehicles

1,227,881

Vehicles exported in 2015

814,000

People employed across UK Auto

Over 32 million

Cars currently on UK roads

1,587,677

Cars built in 2015

94,479

Commercial vehicles built in 2015

2,368,477

Engines built in 2015

2015 INVESTMENT LANDMARKS



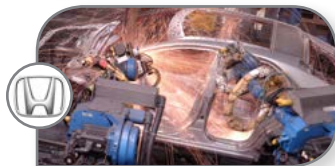
JAGUAR LAND ROVER

Announced more than £1 billion of investment and 1,300 new UK jobs for its West Midlands manufacturing sites.



LONDON TAXI COMPANY

Announced £250 million investment and 1,000 new jobs for its new ultra low emission taxis in Coventry.



HONDA

Announced £200 million investment and the recruitment of 500 new employees for the development of its 5-door Civic in Swindon.



INFINITI

Announced 300 new jobs for the production of the Q30 and QX30 models at its Sunderland plant.



NISSAN

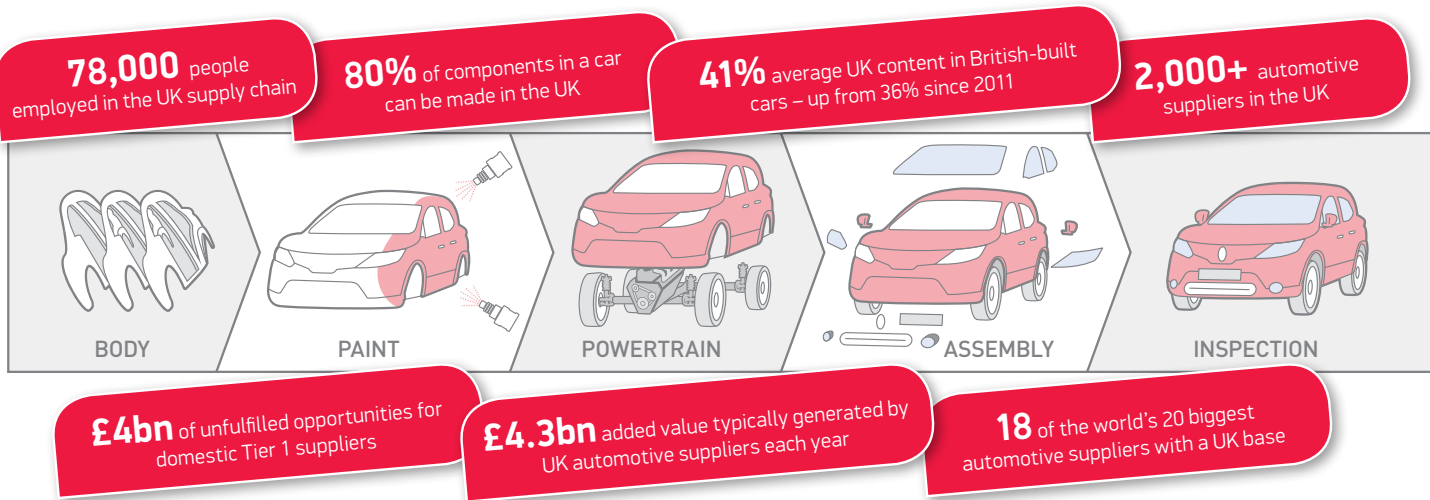
Announced £137 million for production of its new Juke and a new extra-large press line at its Sunderland facility.



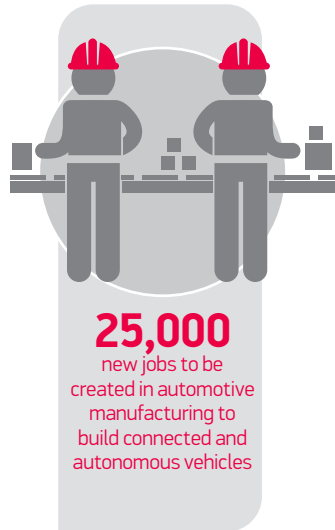
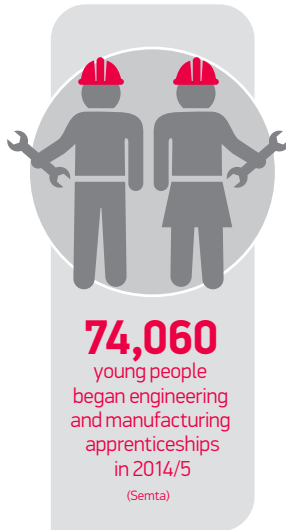
FORD

Announced £181 million investment into new low emission engines at its Bridgend plant.

UK AUTOMOTIVE SUPPLY CHAIN



UK AUTOMOTIVE EMPLOYMENT



UK AUTOMOTIVE: BACKGROUND

In 2015 the UK automotive manufacturing industry...

Turned over
£71.6 billion

Invested
£4 billion
net capital

Invested
£2.25 billion
in R&D

Added
£18.9 billion in
value to the UK economy

Exported products
worth
£34.3 billion,
accounting for
12% of the UK's
total export goods

UK AUTOMOTIVE MANUFACTURING

Top fives in production – 2015



Cars by brand

Make	Volume
Nissan	476,589
Land Rover	387,253
MINI	201,207
Toyota	190,161
Honda	119,414



Cars by model

Model	Volume
Nissan Qashqai	298,947
Toyota Auris	147,907
Nissan Juke	119,065
Range Rover Sport	90,545
Range Rover Evoque	87,358



Commercial vehicles by brand

Make	Volume
Vauxhall	60,990
Land Rover	15,494
DAF	13,785
Alexander Dennis	2,320
Dennis Eagle	817

GLOBAL AUTOMOTIVE MANUFACTURING

Top 15 global automotive manufacturers in 2015

Rank	Country	Cars	Commercial vehicles	Total	% change
1	China	21,079,427	3,423,899	24,503,326	3.3%
2	USA	4,163,679	7,936,416	12,100,095	3.8%
3	Japan	7,830,722	1,447,516	9,278,238	-5.1%
4	Germany	5,707,938	325,226	6,033,164	2.1%
5	South Korea	4,135,108	420,849	4,555,957	0.7%
6	India	3,378,063	747,681	4,125,744	7.3%
7	Mexico	1,968,054	1,597,415	3,565,469	5.9%
8	Spain	2,218,980	514,221	2,733,201	13.7%
9	Brazil	2,018,954	410,509	2,429,463	-22.8%
10	Canada	888,565	1,394,909	2,283,474	-4.6%
11	France	1,553,800	416,200	1,970,000	8.2%
12	Thailand	772,250	1,143,170	1,915,420	1.9%
13	UK	1,587,677	94,479	1,682,156	5.2%
14	Russia	1,214,849	169,550	1,384,399	-26.6%
15	Turkey	791,027	567,769	1,358,796	16.1%

Top 10 European automotive manufacturers in 2015

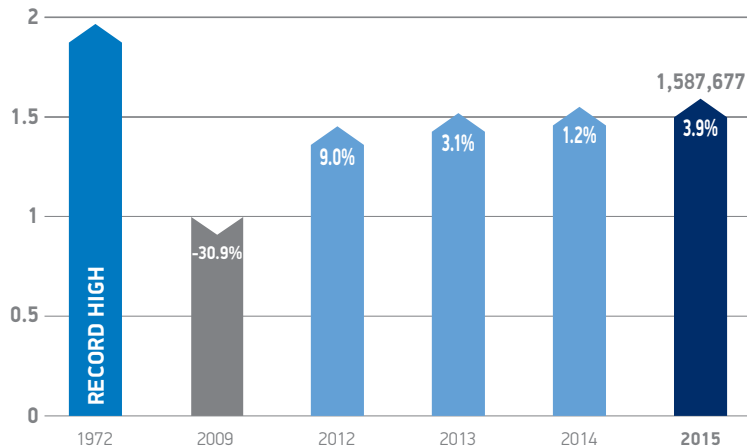
Rank	Country	Cars	Commercial Vehicles	Total	% change
1	Germany	5,707,938	325,226	6,033,164	2.1%
2	Spain	2,218,980	514,221	2,733,201	13.7%
3	France	1,553,800	416,200	1,970,000	8.2%
4	UK	1,587,677	94,479	1,682,156	5.2%
5	Czech Rep.	1,298,236	5,367	1,303,603	4.2%
6	Italy	663,139	351,084	1,014,223	45.3%
7	Poland	534,700	125,903	660,603	11.3%
8	Hungary	491,720	3,650	495,370	13.2%
9	Belgium	369,172	40,168	409,340	-20.8%
10	Romania	387,171	6	387,177	-1.1%

Source: OICA 2016

*See page 12 for 2015 UK car manufacturing data

UK CAR MANUFACTURING

UK car manufacturing (millions)



The average value
of a car exported from the
UK today is **£20,900**

UK car manufacturing – 2014 vs 2015

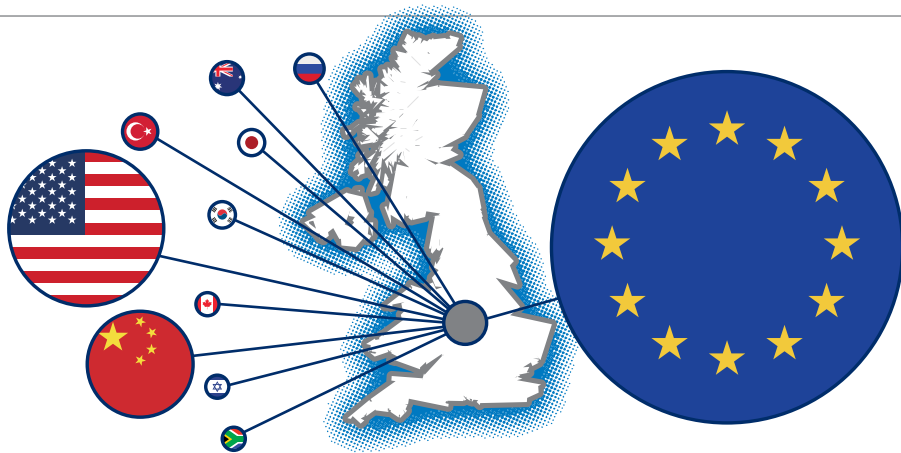
	2014	2015	% Change
Total	1,528,148	1,587,677	3.9 %
Home	332,952	359,796	8.1 %
Export	1,195,196	1,227,881	2.7%
% export	78.2%	77.3%	

UK CAR EXPORTS

In 2015 **77.3%**
of cars built in the UK were exported

The EU accounted for **57.5%**
of UK-built cars exported in 2015

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



TOP EXPORT DESTINATIONS FOR UK CARS

EU	57.5%	TURKEY	2.9%	JAPAN	1.8%	ISRAEL	1.2%
US	10.9%	AUSTRALIA	2.8%	SOUTH KOREA	1.7%	SOUTH AFRICA	1.1%
CHINA	7.0%	RUSSIA	2.0%	CANADA	1.2%		

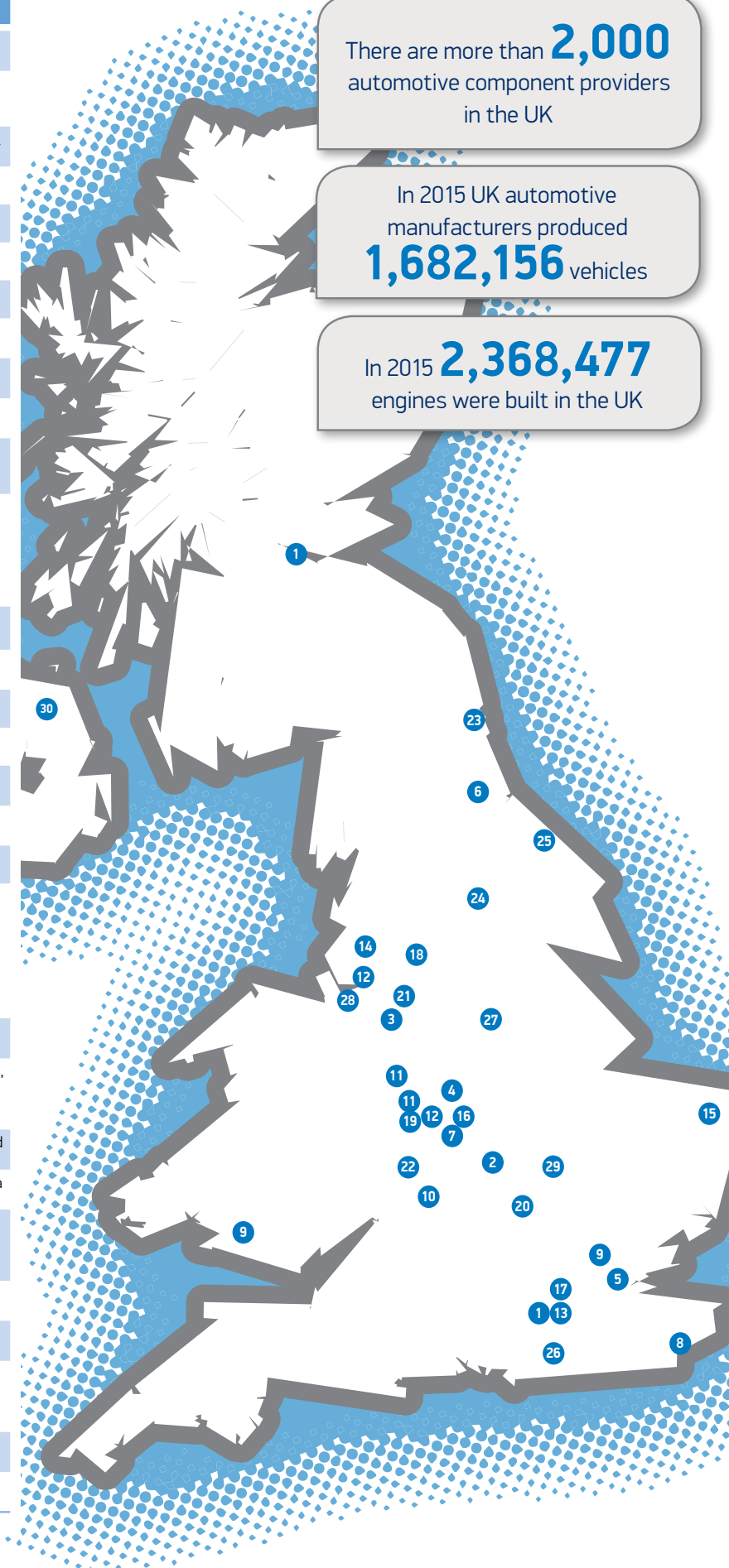
Key UK manufacturing sites

Key	Manufacturer	Location	Sector	Model
1	Alexander Dennis	Falkirk and Guildford	Bus and coach	Enviro bus range
2	Aston Martin	Gaydon	Car	Comet, DB9, DB11, Rapide, Vantage, Vanquish.
3	Bentley	Crewe	Car and engine	Bentayga, Continental 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
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 & Wolverhampton	Car and engine	Engine range Jaguar: F-Pace F-Type, XE, XJ and XF
12	Jaguar Land Rover	Solihull and Halewood	Car	Land Rover: Discovery, Discovery Sport, Range Rover, Range Rover Sport, and Evoque.
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	540, 570, 650, 675 and P1
18	Mellor	Rochdale	Bus and coach	Accessible coach range
19	MG Motors	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	JJuke, LEAF, Note and Qashqai, Infiniti Q30
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 more than **2,000** automotive component providers in the UK

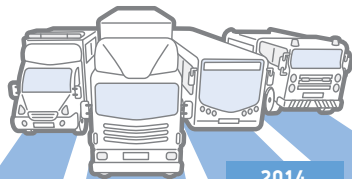
In 2015 UK automotive manufacturers produced **1,682,156** vehicles

In 2015 **2,368,477** engines were built in the UK



CV AND ENGINE MANUFACTURING

UK Commercial
Vehicle
manufacturing
volumes:
2012 to 2015



2014
70,869

2013
88,110

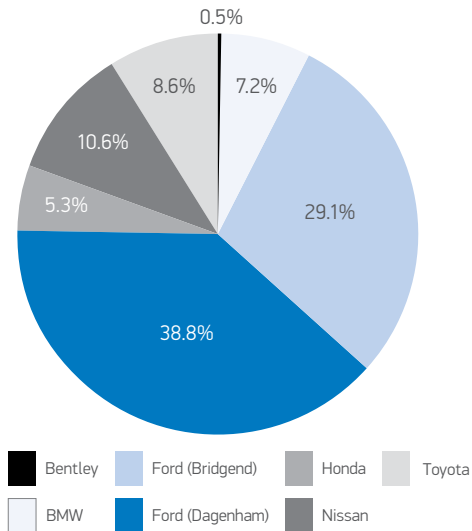
2015
94,479

2012
112,039

UK Commercial Vehicle
manufacturing
– 2015 vs 2014

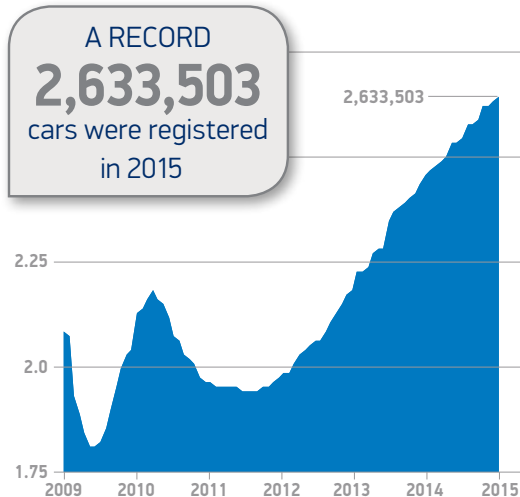
	2014	2015	% Change
Total	70,869	94,479	33.3%
Home	35,945	47,300	31.6%
Export	34,924	47,179	35.1%
% export	49.3%	49.9%	

UK engine manufacturing volumes – 2015

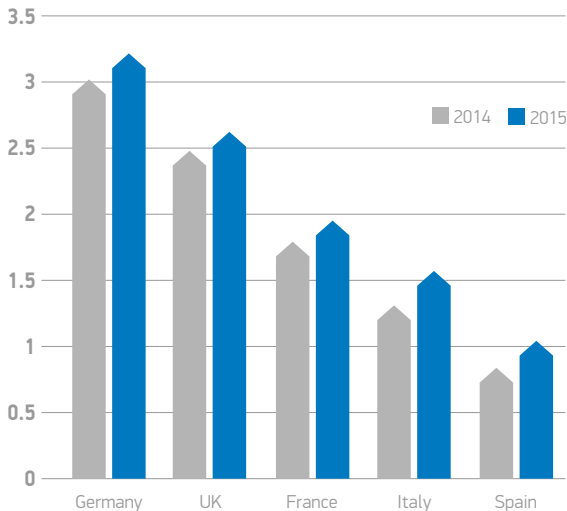


REGISTRATIONS

New Car Registrations (MILLIONS)



New Car Registrations: UK vs EU* (MILLIONS)



*Source: ACEA 2015

Top 10 UK sellers in 2015

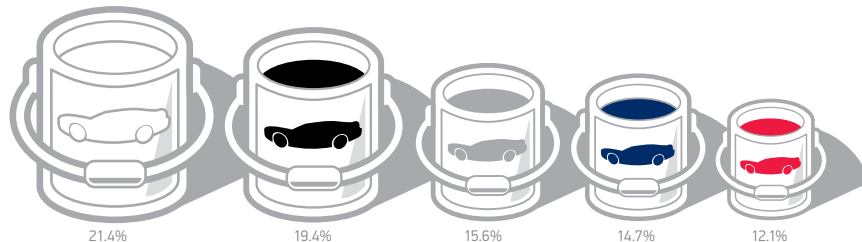
	Model	Volume
1	Ford Fiesta	133,434
2	Vauxhall Corsa	92,077
3	Ford Focus	83,816
4	Volkswagen Golf	73,409
5	Nissan Qashqai	60,814
6	Volkswagen Polo	54,900
7	Vauxhall Astra	52,703
8	Audi A3	47,653
9	Mini	47,076
10	Vauxhall Mokka	45,399

REGISTRATIONS BY COLOUR

Top 10 car colours 2015

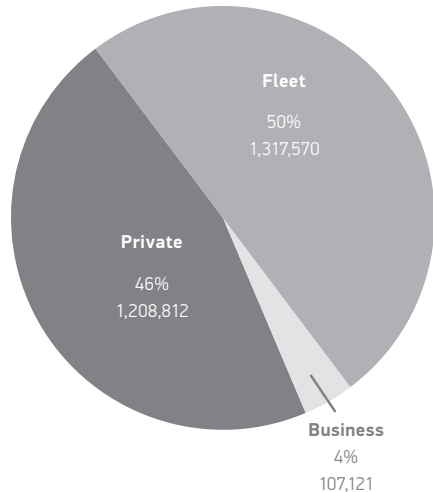
Colour	No. Registrations	% market share	% change on 2014
1 White	564,393	21.4%	+2.2%
2 Black	509,677	19.4%	+5.3%
3 Grey	411,717	15.6%	+21.1%
4 Blue	386,432	14.7%	+15.5%
5 Red	318,897	12.1%	+1.8%
6 Silver	295,429	11.2%	-5.2%
7 Green	28,250	1.1%	+31.2%
8 Brown	25,445	1.0%	-23.3%
9 Orange	17,773	0.7%	+25.7%
10 Mauve	12,719	0.5%	+30.0

Market share by colour 2015



REGISTRATIONS BY SALES TYPE

2015 registrations by sales type



Top five new car registrations in 2015 by sales type



Private

Model	Volume
Ford Fiesta	80,803
Vauxhall Corsa	44,303
Volkswagen Polo	37,183
Mini Mini	29,388
Ford Focus	28,469



Fleet

Model	Volume
Ford Focus	53,329
Ford Fiesta	52,601
Volkswagen Golf	49,280
Vauxhall Astra	35,039
Nissan Qashqai	33,629



Business

Model	Volume
Vauxhall Corsa	14,676
Vauxhall Astra	6,265
Vauxhall Mokka	5,530
Nissan Micra	3,608
Mercedes E Class	3,346

Business

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

Fleet

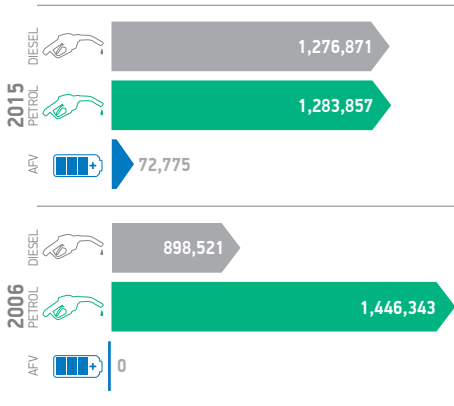
If the vehicle is being registered by a company that operates a fleet of 25 or more vehicles, it is designated a fleet sale. This includes dealer demonstrators and Motability-leased vehicles.

Private

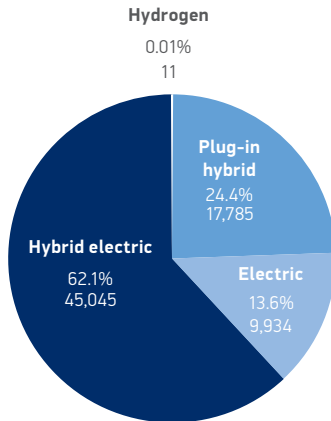
If the vehicle is being registered primarily for the personal use of a private individual, it is designated a private sale.

REGISTRATIONS BY FUEL TYPE

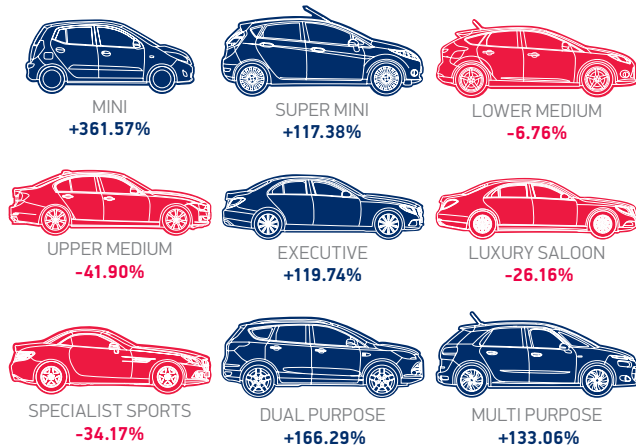
New car registrations by fuel type – 2006 vs 2015



2015 AFV registrations



The change in segment registrations – 2015 vs 2006



REGISTRATIONS BY SEGMENT

Top cars registered by segment



Model	Volume	Segment share
Hyundai i10	23,846	33.9%
Volkswagen up!	16,904	24.1%
Skoda Citigo	8,533	12.1%
Suzuki Celerio	7,901	11.2%
Vauxhall Viva	5,452	7.8%

Segment total: 70,263

Model	Volume	Segment share
Ford Fiesta	133,434	14.4%
Vauxhall Corsa	92,077	9.9%
Volkswagen Polo	54,900	5.9%
Mini Mlni	47,076	5.1%
Fiat 500	41,766	4.5%

Segment total: 926,241

Model	Volume	Segment share
Ford Focus	83,816	11.7%
Volkswagen Golf	73,409	10.3%
Vauxhall Astra	60,814	8.5%
Nissan Qashqai	52,703	7.4%
Audi A3	47,653	6.7%

Segment total: 715,604

REGISTRATIONS BY SEGMENT

Top cars registered by segment



Model	Volume	Segment share
BMW 3 Series	36,728	14.7%
Vauxhall Insignia	33,727	13.5%
BMW 4 Series	23,704	9.5%
Skoda Octavia	22,580	9.1%
Audi A4	21,148	8.5%

Segment total: 249,347



Model	Volume	Segment share
Mercedes-Benz C-Class	41,821	32.8%
Mercedes-Benz E-Class	26,634	20.9%
BMW 5 Series	21,428	16.8%
Audi A6	15,787	12.4%
Jaguar XF	10,977	8.6%

Segment total: 127,666



Model	Volume	Segment share
Mercedes-Benz S-Class	3,063	33.8%
Audi A8	1,212	13.4%
Jaguar XJ	1,062	11.7%
Bentley Continental	962	10.6%
BMW 7 Series	941	10.4%

Segment total: 9,061

REGISTRATIONS BY SEGMENT

Top cars registered by segment



Model	Volume	Segment share
Audi TT	9,145	18.6%
Volkswagen Scirocco	6,057	12.3%
Mercedes-Benz SLK	5,270	10.7%
Mazda MX-5	3,097	6.3%
BMW 6 Series	2,697	5.5%

Segment total: 49,118

Model	Volume	Segment share
Ford Kuga	32,936	9.3%
Kia Sportage	23,010	6.5%
Volkswagen Tiguan	21,889	6.2%
Range Rover Evoque	20,802	5.9%
Land Rover Discovery	16,485	4.6%

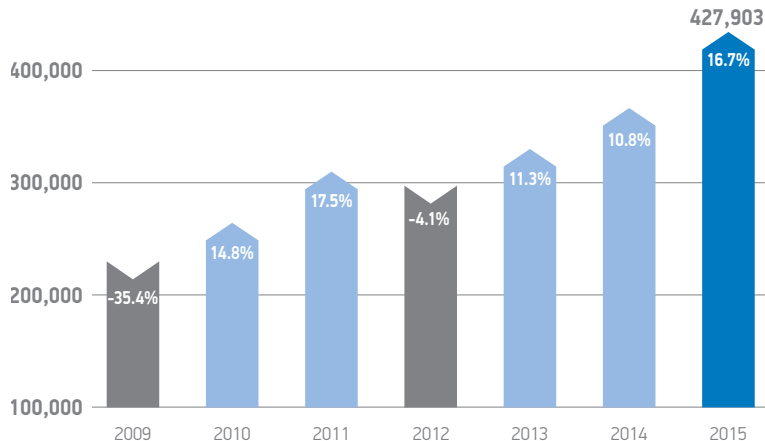
Segment total: 355,118

Model	Volume	Segment share
Citroen C4 Picasso	17,599	13.4%
Ford C-Max	16,305	12.4%
Vauxhall Zafira Tourer	15,922	12.1%
Ford B-Max	10,289	7.8%
Mercedes-Benz B-Class	6,089	4.6%

Segment total: 131,085

CV REGISTRATIONS

Commercial vehicle registrations – 2009 to 2015



2015 commercial vehicle registrations

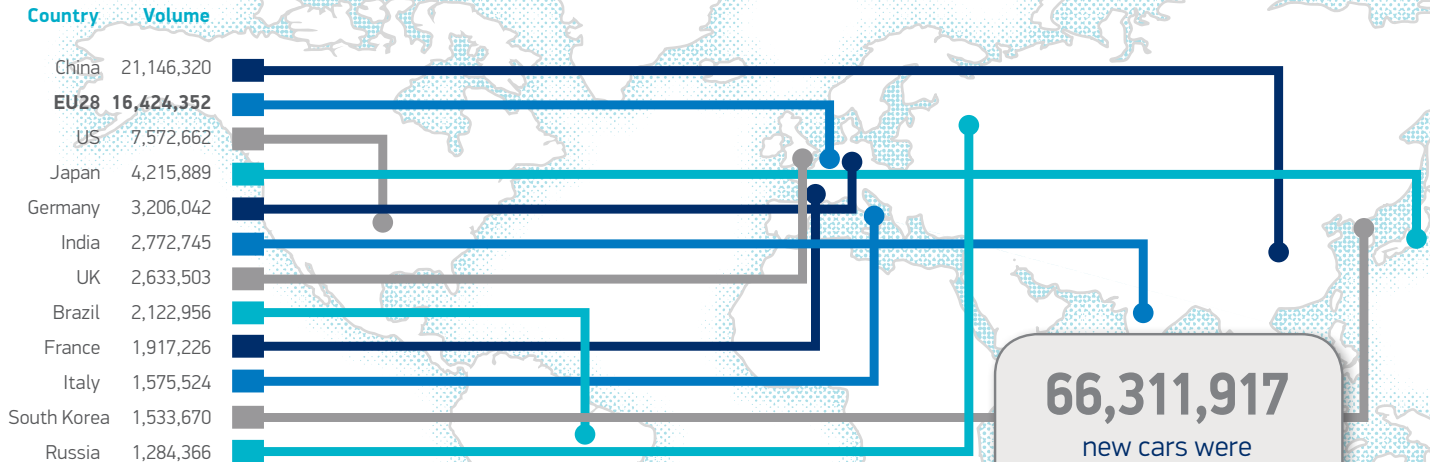
	LCVs up to 3.5t	Rigids	Artics	Bus and coach
Volume	371,830	30,930	21,134	4,009
% change	15.6%	19.5%	35.6%	16.5%

427,903
commercial vehicles
were registered in 2015



GLOBAL CAR REGISTRATIONS

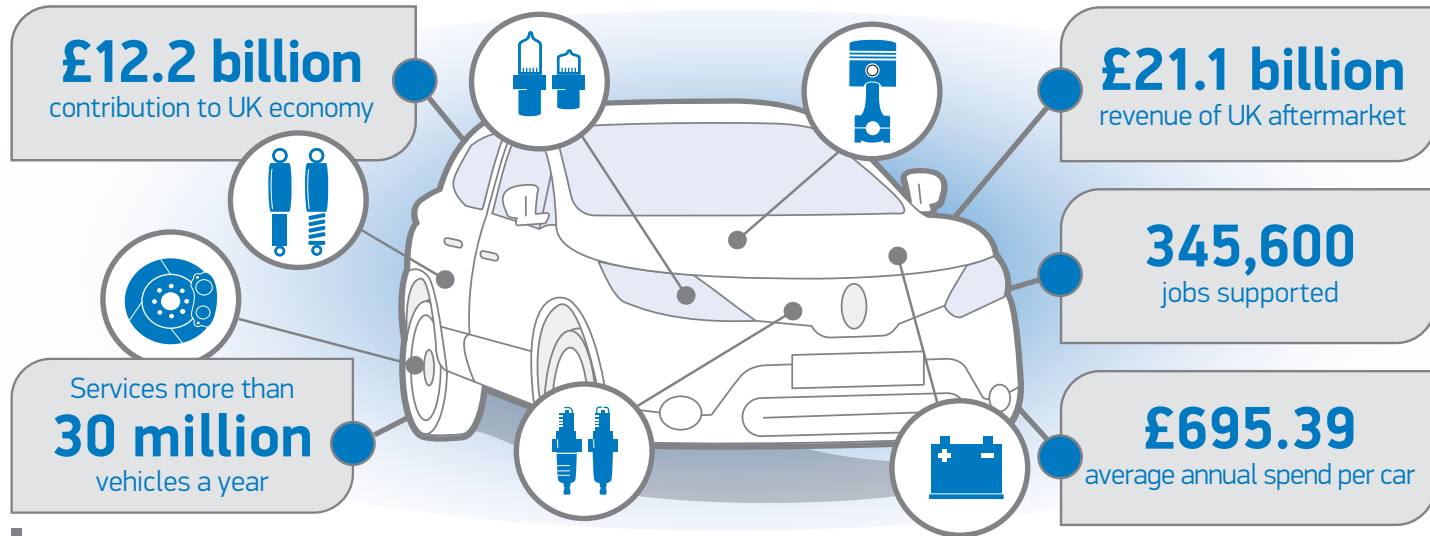
International new car registrations – 2015



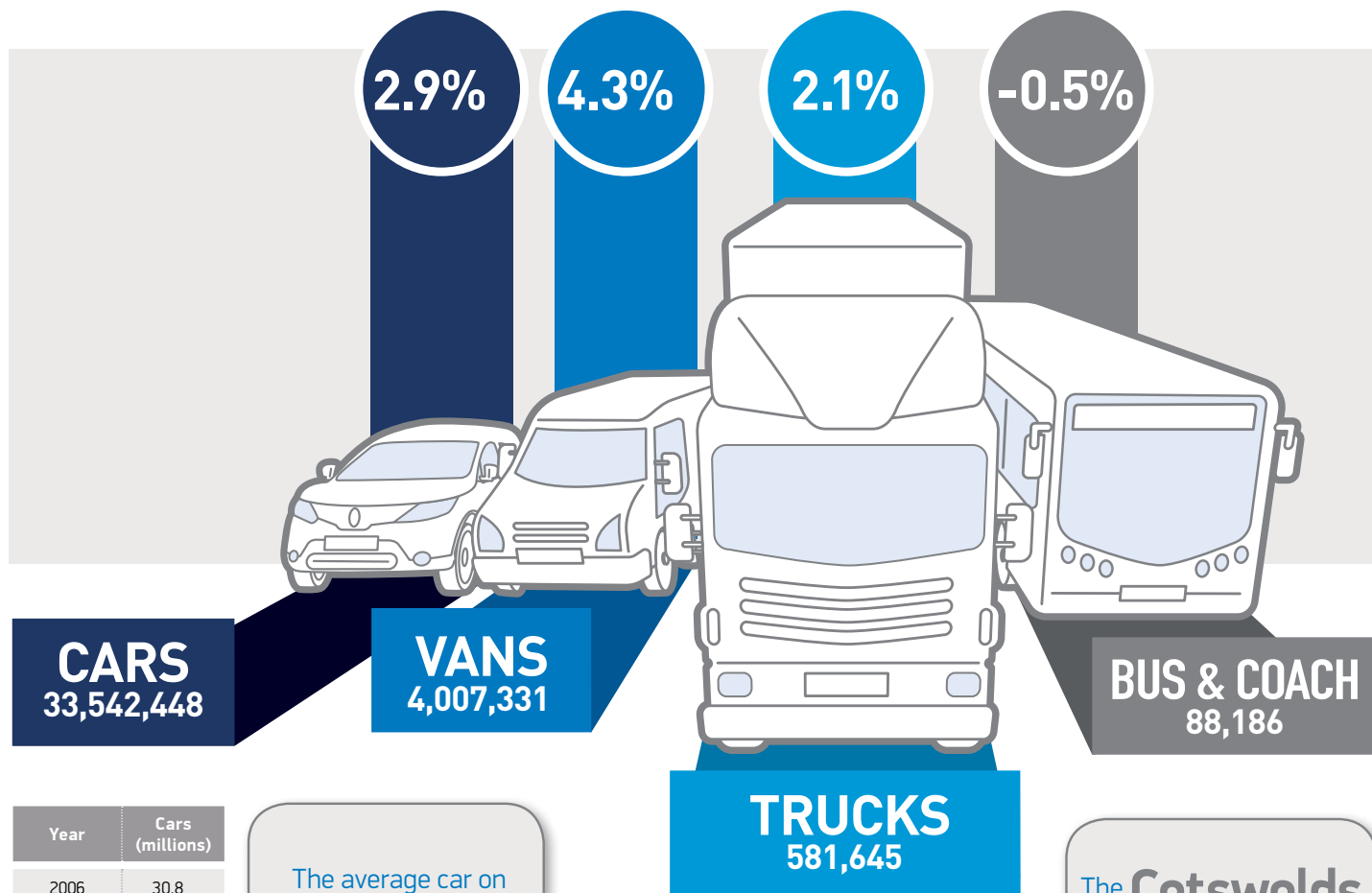
Source: OICA 2016

UK AUTOMOTIVE AFTERMARKET

The Importance of the Aftermarket to the UK Economy



Source: Frost & Sullivan



Year	Cars (millions)
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
2015	33.5

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

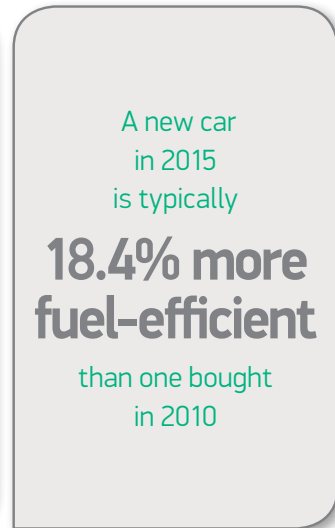
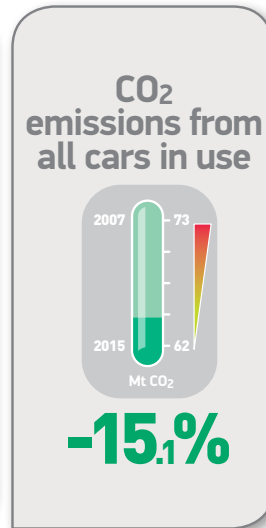
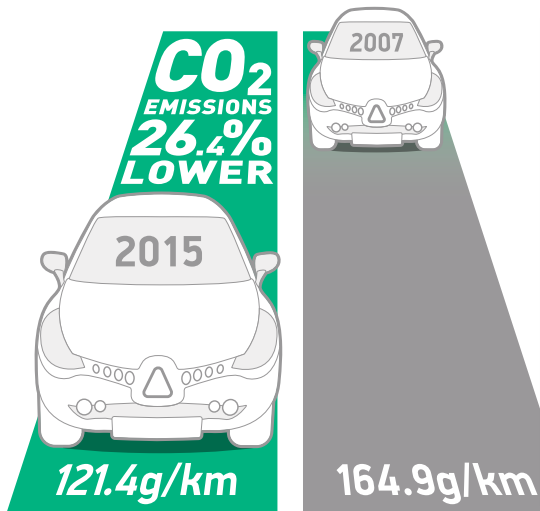
There are **35,207** turquoise cars in the UK

38,219,610 vehicles on UK roads

The **Cotswolds** and **City of London** have the highest proportion of **plug-in cars** at **2.8%**

ENVIRONMENT – CO₂

Emissions reduction



ENVIRONMENT – AIR QUALITY

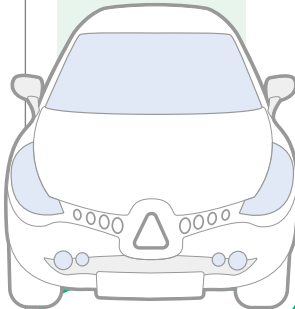
A **Euro-VI** bus emits
95% less NO_x
on the road than a
Euro-V bus

Source: Transport for London

EURO★V
EMISSIONS LIMITS

EURO★VI
EMISSIONS LIMITS

2001



EURO★3
EMISSIONS LIMITS

0.5 g/km

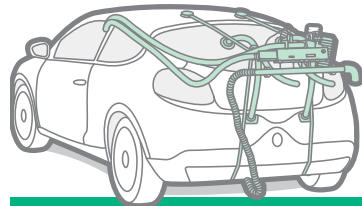
Reduction in
diesel car
NO_x emissions

2015



EURO★6
EMISSIONS LIMITS

0.08 g/km



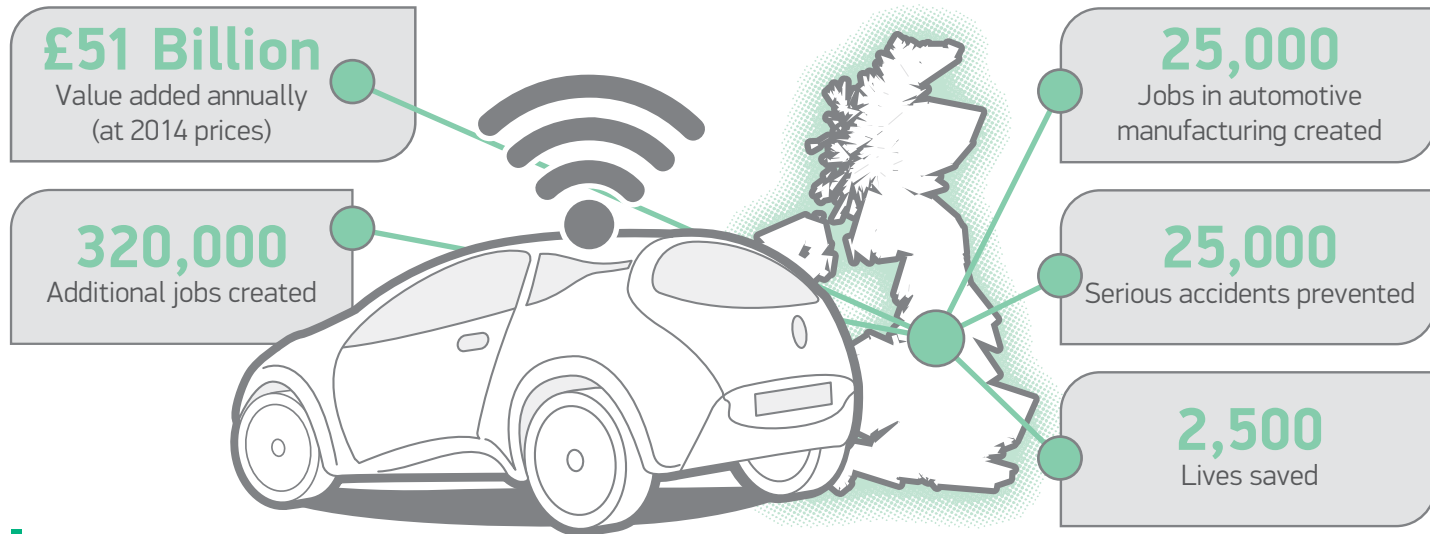
PEMS

Portable Emissions Measurement System
ON-ROAD EMISSIONS TESTING

From 2017 new cars will be tested
on the road for the very first time

CONNECTED CARS

UK Economic Impact of Connected and Autonomous Vehicles 2014-2030



SMMT SUBSIDIARIES AND PARTNERSHIPS

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

Motor Codes is the government-backed, self-regulatory body for the motor industry, operating 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 and dispute resolution service.

www.motorcodes.co.uk

DISCLAIMER

This publication contains general information and, although SMMT endeavours to ensure that the content is accurate and up-to-date at the date of publication, no representation or warranty, express or implied, is made as to its accuracy or completeness and therefore the information in this publication should not be relied upon. Readers should always seek appropriate advice from a suitably qualified expert before taking, or refraining from taking, any action. The contents of this publication should not be construed as advice or guidance and SMMT disclaims liability for any loss, howsoever caused, arising directly or indirectly from reliance on the information in this publication. Any use of data should be credited to SMMT.



THE SOCIETY OF MOTOR MANUFACTURERS AND TRADERS

71 Great Peter Street, London, SW1P 2BN

Tel: +44 (0)20 7235 7000

E-mail: communications@smmt.co.uk

 :@SMMT  :SMMT

www.smmt.co.uk