MOTOR INDUSTRY FACTS - 2005

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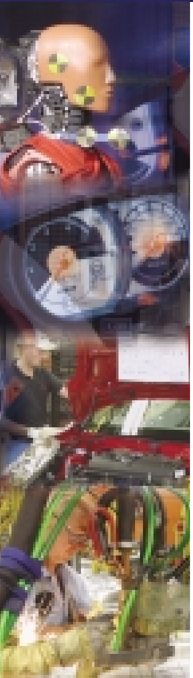

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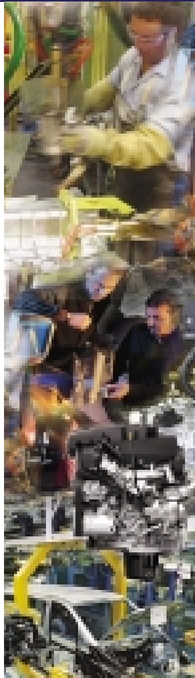
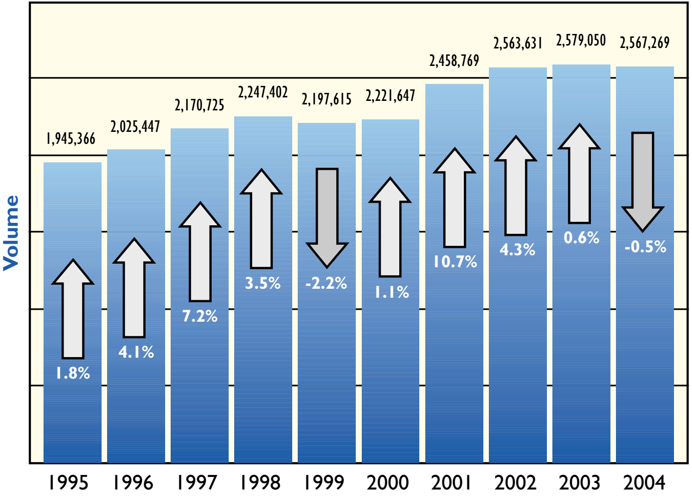


Car registrations

Ten year annual new car registration totals



Source: SMMT

Top 10 registered models in 2004

Rank	Make	Model Range	Volume
1	Ford	Focus	141,021
2	Vauxhall	Corsa	101,625
3	Ford	Fiesta	89,295
4	Peugeot	206	86,605
5	Renault	Mégane	86,569
6	Vauxhall	Astra	85,087
7	Renault	Clio	72,412
8	Volkswagen	Golf	69,784
9	Ford	Mondeo	60,441
10	Peugeot	307	58,742
		Total top 10	**851,581**
		Total market	**2,567,269**

Fact or fiction?

Since 1965 only five models have topped the UK best sellers' list

Answer: Fact

The five models are: Austin 1100/1300 in 1965-66 and 1968-71 Ford Cortina in 1967, 1972-1981, Ford Escort in 1982-89, 1992-95 Ford Fiesta in 1990-91, 1996-98, Ford Focus in 1999– 2004

Five year annual new car registrations across Europe

Year	France	Germany	Italy	Spain	UK	European Union (EU 15)
2000	2,133,884	3,378,343	2,423,084	1,392,477	2,221,647	14,362,377
2001	2,254,732	3,341,718	2,413,455	1,439,603	2,458,769	14,416,083
2002	2,145,071	3,252,898	2,279,612	1,351,054	2,563,631	14,027,394
2003	2,009,246	3,236,938	2,247,043	1,430,118	2,579,050	13,891,003
2004	2,013,709	3,266,826	2,258,861	1,585,744	2,567,269	14,190,415

Source: SMMT

Fact or fiction?

Hot European countries sell more convertibles than the UK

Answer: Fiction

The UK sells roughly three times more topless cars than either France or Italy. Only Germany, by far the largest European market for new cars, sells more convertibles each year but their 45.7 per cent growth in the market since 1999 is still dwarfed by the UK's hike of 154 per cent

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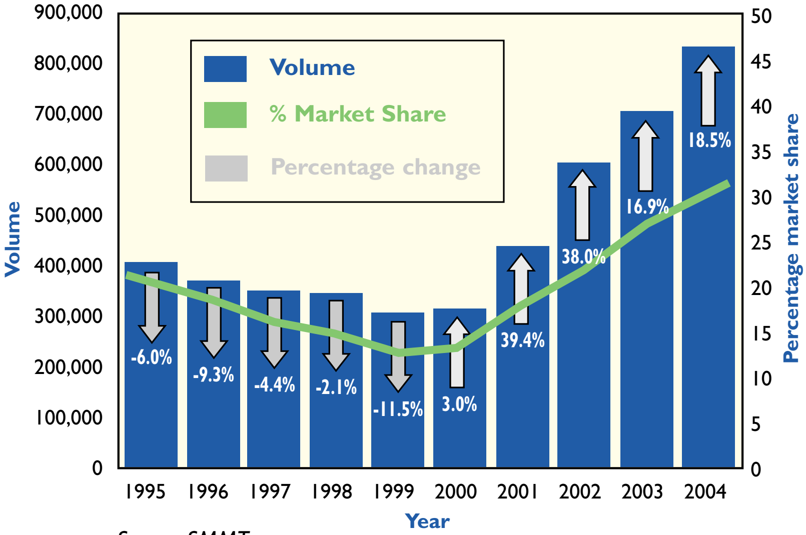
Ten year annual diesel totals with percentage market share



Source: SMMT

Ten year annual total diesel by private and non-private registrations

	NON-PRIVATE	PRIVATE	Total
1995	241,836	163,243	405,079
1996	235,754	131,466	367,220
1997	231,537	119,376	350,913
1998	225,837	117,535	343,372
1999	205,675	98,250	303,925
2000	205,980	107,212	313,192
2001	284,489	152,102	436,591
2002	394,308	208,315	602,623
2003	438,701	265,936	704,637
2004	539,488	295,846	835,334

Top 10 best selling new diesel cars in 2004

1. Ford - Focus

42,296

2. Ford - Mondeo

38,562

3. Volkswagen - Golf

38,245

4. Renault - Mégane

36,305

5. Volkswagen - Passat

27,972

6. Peugeot - 307

26,155

7. Vauxhall - Vectra

25,232

8. Vauxhall - Astra

24,675

9. BMW - 3 Series

21,864

10. Citroën - Xsara

21,139

Source: SMMT

Total diesel cars - 835,334

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Segment totals and percentage market share

Segment	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Mini	17,841 0.9%	15,457 0.8%	14,390 0.7%	23,765 1.1%	39,635 1.8%	52,203 2.3%	47,899 1.9%	40,370 1.6%	38,940 1.5%	36,171 1.4%
Supermini	525,365 27.0%	548,266 27.1%	575,597 26.5%	566,839 25.2%	593,745 27.0%	688,686 31.0%	773,995 31.5%	831,264 32.4%	873,690 33.9%	839,604 32.7%
Lower Medium	638,925 32.8%	671,383 33.1%	704,036 32.4%	751,464 33.4%	703,611 32.0%	661,502 29.8%	741,817 30.2%	771,319 30.1%	719,164 27.9%	729,116 28.4%
Upper Medium	484,020 24.9%	497,566 24.6%	545,971 25.2%	549,747 24.5%	513,218 23.4%	476,860 21.5%	507,736 20.7%	505,026 19.7%	480,220 18.6%	459,635 17.9%
Executive	125,692 6.5%	120,193 5.9%	125,248 5.8%	123,927 5.5%	115,509 5.3%	104,583 4.7%	109,433 4.5%	114,382 4.5%	118,579 4.6%	109,667 4.3%
Luxury Saloon	15,545 0.8%	15,771 0.8%	15,699 0.7%	16,943 0.8%	12,375 0.6%	11,406 0.5%	11,053 0.4%	10,193 0.4%	13,500 0.5%	13,620 0.5%
Specialist Sports	37,426 1.9%	43,942 2.2%	63,658 2.9%	68,414 3.0%	68,846 3.1%	67,208 3.0%	65,358 2.7%	60,108 2.3%	65,178 2.5%	73,940 2.9%
Dual Purpose-4x4s/SUVs	80,427 4.1%	78,290 3.9%	81,711 3.8%	98,757 4.4%	98,926 4.5%	99,212 4.5%	121,556 4.9%	137,582 5.4%	159,144 6.2%	179,439 7.0%
Multi-Purpose	20,125 1.0%	34,579 1.7%	44,415 2.0%	47,546 2.1%	51,750 2.4%	59,987 2.7%	79,922 3.3%	93,387 3.6%	110,635 4.3%	126,077 4.9%
Total	**1,945,366**	**2,025,447**	**2,170,725**	**2,247,402**	**2,197,615**	**2,221,647**	**2,458,769**	**2,563,631**	**2,579,050**	**2,567,269**

Source: SMMT

Top five bestsellers for 2004 by segment

Mini

		2004	Regs	Mkt share
1	Suzuki	Alto	8,642	23.9%
2	Chevrolet	Matiz	6,373	17.6%
3	Vauxhall	Agila	4,944	13.7%
4	Suzuki	Wagon R+	4,342	12.0%
5	Smart	City Coupe	3,625	10.0%
		Segment Total	36,171	

Supermini

		2004	Regs	Mkt share
1	Vauxhall	Corsa	101,625	12.1%
2	Ford	Fiesta	89,295	10.6%
3	Peugeot	206	86,605	10.3%
4	Renault	Clio	72,412	8.6%
5	Ford	Ka	45,879	5.5%
		Segment Total	839,604	

Lower Medium

Fact or fiction?

The Lower Medium segment has the most model ranges of all segments

		2004	Regs	Mkt share
1	Ford	Focus	141,021	19.3%
2	Renault	Mégane	86,569	11.9%
3	Vauxhall	Astra	85,087	11.7%
4	Volkswagen	Golf	69,784	9.6%
5	Peugeot	307	58,742	8.1%
		Segment Total	729,116	

Answer: Fact

The Lower Medium segment has 51 models, increasing from 40 in 1999 and includes the Ford Focus, Honda Civic and the Vauxhall Astra

Source: SMMT

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Top five bestsellers for 2004 by segment

Upper Medium

	2004		Regs	Mkt share
1	Ford	Mondeo	60,441	13.1%
2	BMW	3 Series	53,790	11.7%
3	Vauxhall	Vectra	48,450	10.5%
4	Audi	A4	33,441	7.3%
5	Volkswagen	Passat	31,510	6.9%

Segment Total 459,635

Executive

	2004		Regs	Mkt share
1	Mercedes	C Class	29,567	27.0%
2	Mercedes	E Class	17,676	16.1%
3	BMW	5 Series	16,678	15.2%
4	Volvo	V70/XC70	10,255	9.4%
5	Mercedes	CLK	9,512	8.7%

Segment Total 109,667

Luxury

	2004		Regs	Mkt share
1	Jaguar	XJ	2,855	21.0%
2	Mercedes	SL	2,566	18.8%
3	Mercedes	S Class	2,268	16.7%
4	Bentley	Continental	1,841	13.5%
5	BMW	7 Series	1,437	10.6%

Segment Total 13,620

Source: SMMT

Top five bestsellers for 2004 by segment

Sports

		2004	Regs	Mkt share
1	Mazda	RX-8	9,303	12.6%
2	Audi	TT	8,425	11.4%
3	MG	MGTF	7,596	10.3%
4	Mazda	MX-5	6,372	8.6%
5	BMW	Z Series	4,815	6.5%

Segment Total 73,940

Dual Purpose - 4x4s/SUVs

		2004	Regs	Mkt share
1	Land Rover	Freelander	21,657	12.1%
2	Toyota	RAV4	15,660	8.7%
3	Honda	CR-V	13,025	7.3%
4	Land Rover	Discovery	11,436	6.4%
5	Nissan	X-Trail	11,029	6.1%

Segment Total 179,439

MPV

		2004	Regs	Mkt share
1	Vauxhall	Zafira	51,175	40.6%
2	Volkswagen	Touran	11,504	9.1%
3	Ford	Galaxy	9,138	7.2%
4	Kia	Sedona	7,326	5.8%
5	Chrysler	Voyager	4,711	3.7%

Segment Total 126,077

Fact or fiction?

Japan has the most specialist sports car manufacturers in the world

Answer: Fiction

The UK has the most specialist sports car manufacturers with over 100 based here, including Caterham, Morgan and Lotus

Source: SMMT

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Five year annual UK registration totals by region

England

	Total	Percentage change	Per cent market share
2000	1,901,406	1.4	86.3
2001	2,100,573	10.5	86.0
2002	2,180,871	3.8	85.7
2003	2,189,450	0.4	85.4
2004	2,175,614	-0.6	85.2

Northern Ireland

	Total	Percentage change	Per cent market share
2000	57,591	-9.2	2.6
2001	59,263	2.9	2.4
2002	62,318	5.2	2.4
2003	67,320	8.0	2.6
2004	65,898	-2.1	2.6

Scotland

	Total	Percentage change	Per cent market share
2000	167,124	3.5	7.6
2001	194,902	16.6	8.0
2002	211,006	8.3	8.3
2003	214,762	1.8	8.4
2004	215,171	0.2	8.4

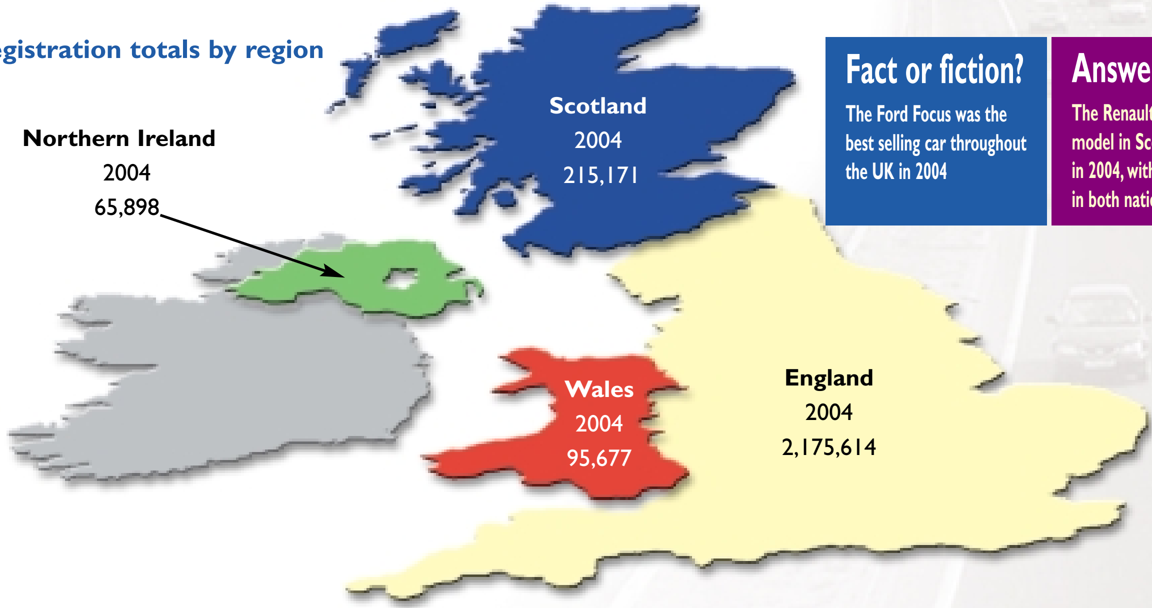
Wales

	Total	Percentage change	Per cent market share
2000	78,392	-2.7	3.6
2001	86,476	10.3	3.5
2002	91,173	5.4	3.6
2003	91,367	0.2	3.6
2004	95,677	4.7	3.7

Note: Channel Islands and Isle of Man new car registrations not included.

Source: SMMT

UK registration totals by region



Fact or fiction?

The Ford Focus was the best selling car throughout the UK in 2004

Answer: Fiction

The Renault Mégane was the best selling model in Scotland and Northern Ireland in 2004, with the Focus appearing third in both nations' lists

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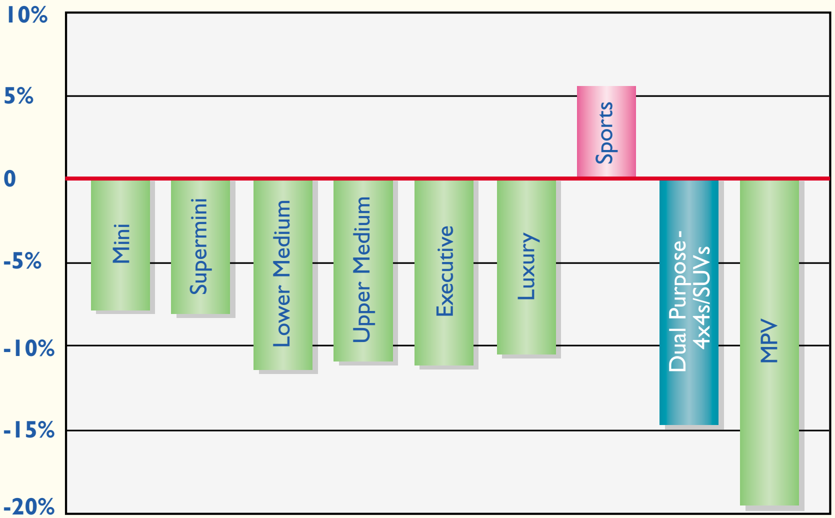
Change in CO_2 performance 1997 – 2004 for new cars by segment



Source: SMMT

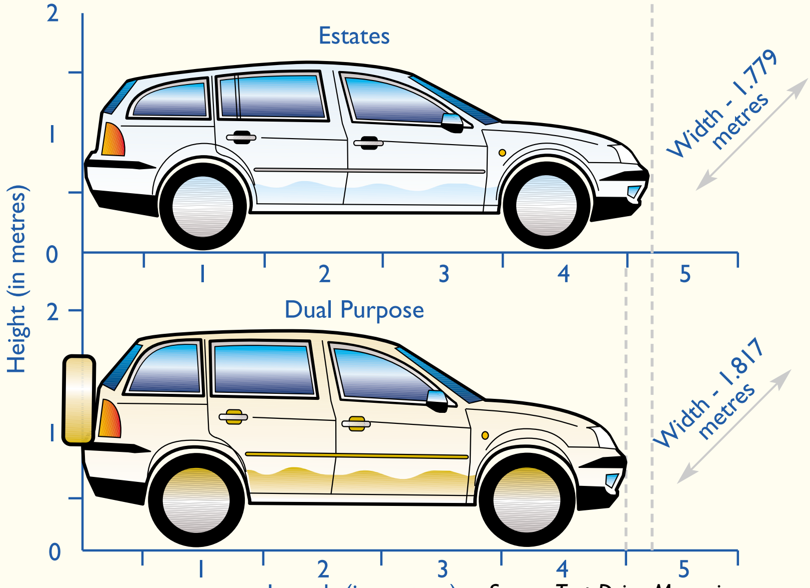
Fact or fiction?

London has a higher number of new 4x4s (Dual Purpose vehicles) registered than any other UK city

Answer: Fiction

Edinburgh had the highest number in 2004 - with 7.82 per cent of all new registrations in the segment. Sheffield came second with 7.02 per cent with London taking 6.98 per cent

Average size of new cars by segment



Source: Test Drive Magazine

	No. of models used	Length (metres)	Width (metres)	Height (metres)
Lower Medium	39	4.226	1.737	1.517
Upper Medium	34	4.592	1.766	1.451
Executive	13	4.794	1.812	1.481
Luxury Saloon	8	5.160	1.937	1.547
Multi Purpose	23	4.555	1.815	1.740
Estates	27	4.644	1.779	1.494
Dual Purpose	45	4.500	1.817	1.768

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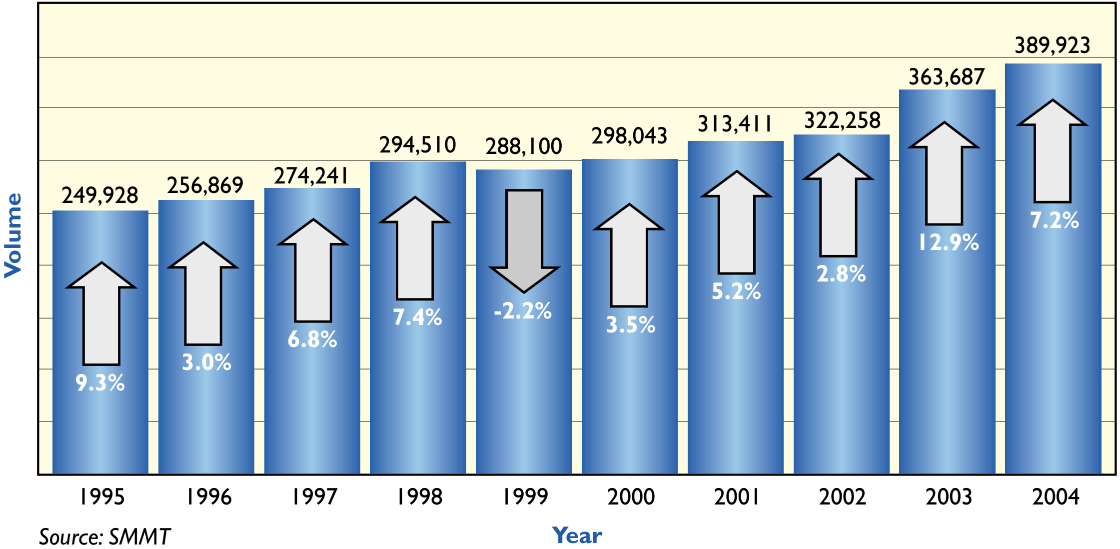
CV registrations

Ten year annual new CV (commercial vehicle) registration totals



Source: SMMT

Fact or fiction?

The Commercial Vehicle and Automotive Trade Show is the largest business-to-business show of its type in the UK

Answer: Fact

The Show is the biggest and most successful in Europe. In 2005 it took 11 halls with 630 exhibitors. The stands covered 45,000 square metres in an overall area of over 90,000 square metres

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Ten year annual new CV registrations by segment

		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
LCVs	Car-type pick-ups	3,595	3,646	2,815	3,043	3,210	3,742	5,525	9,690	13,700	13,180
	Vans to 2.0t	68,750	71,983	80,540	81,564	78,542	78,512	79,689	77,682	86,706	83,864
	Vans 2.0 to 2.6t	34,925	35,323	40,006	39,853	35,425	32,759	23,912	21,214	27,192	29,408
	Vans 2.6 to 3.5t	73,349	77,712	87,663	100,354	104,392	116,434	136,981	148,892	168,596	195,814
	4x4 Utilities	13,548	14,396	13,705	12,509	10,192	8,035	7,968	8,868	7,561	7,333
Trucks	All Rigids	33,799	33,151	30,228	35,431	33,628	35,517	37,279	35,135	36,788	37,461
Trucks	All Artics	18,462	17,002	15,389	17,531	18,163	18,663	18,294	16,785	18,802	18,851
Buses & Coaches	Buses & Coaches	3,500	3,656	3,895	4,225	4,548	4,381	3,763	3,992	4,342	4,012
All Commercial Vehicles		249,928	256,869	274,241	294,510	288,100	298,043	313,411	322,258	363,687	389,923

Source: SMMT

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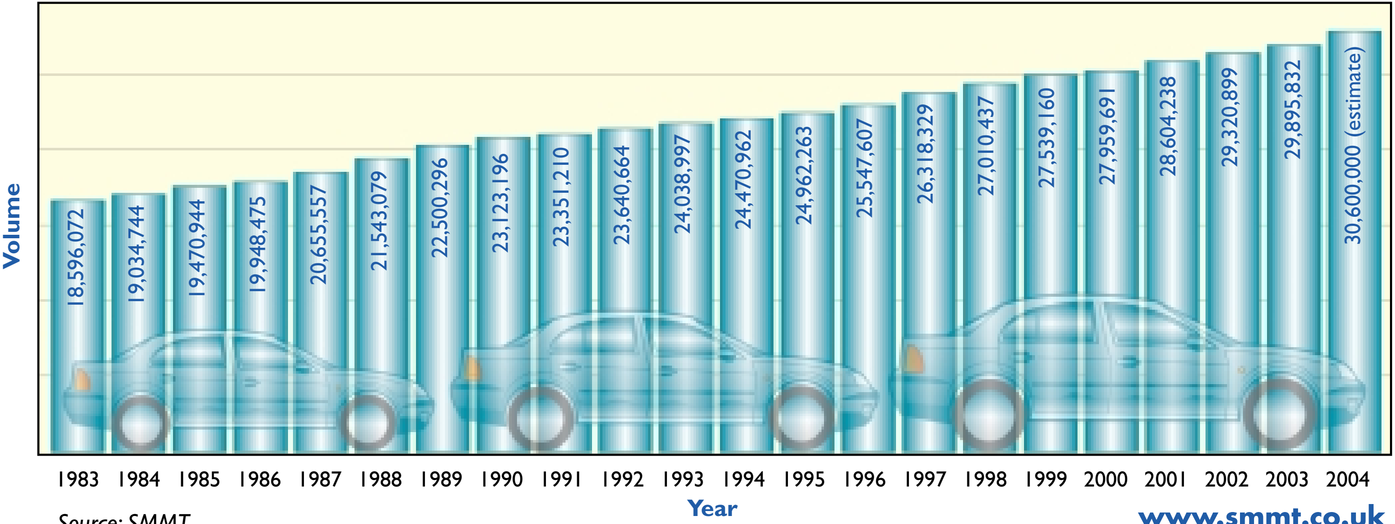
On the road

Annual totals of cars on UK roads 1983 - 2004



Source: SMMT

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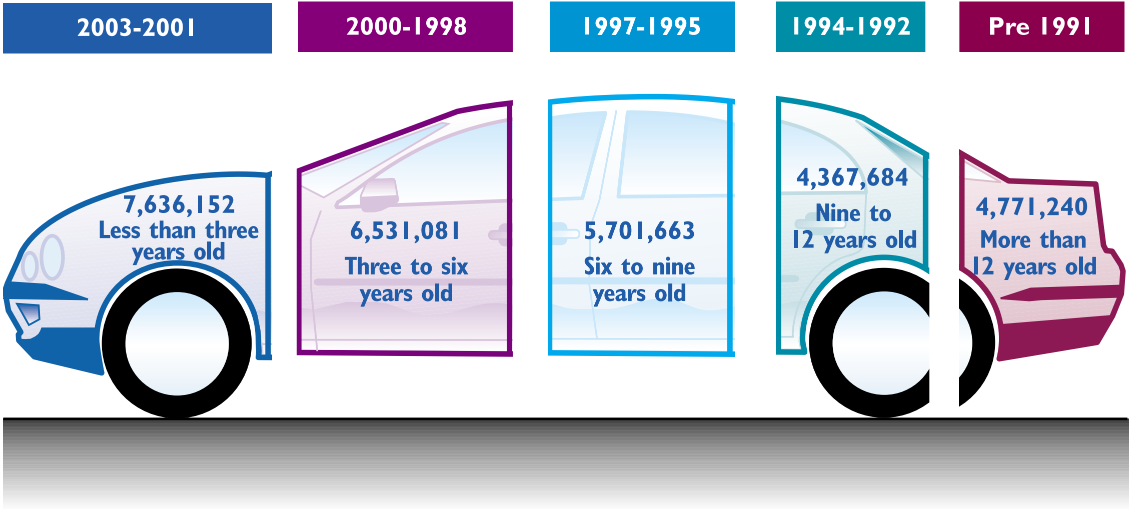
Cars on UK roads by age – January 2004



Source: SMMT

Fact or fiction?

London has the newest cars

Answer: Fiction

At 7.4 years, cars in Greater London are older than the national average. The average age of cars in GB is 6.8 years Cheshire has the youngest cars at 5.6 years old. The Isle of Wight has the oldest at 8.5 years old

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Colours of cars on GB roads 2003 and 1994 - Top five

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2003			1994		
Top colours	Volume	Per cent of parc	Top colours	Volume	Per cent of parc
Blue	7,235,456	25.0 per cent	Red	6,283,977	26.4 per cent
Red	5,790,899	20.0 per cent	Blue	5,721,302	24.0 per cent
Silver	5,033,852	17.4 per cent	White	3,505,141	14.7 per cent
Green	3,358,334	11.6 per cent	Silver	1,869,802	7.9 per cent
Black	2,348,798	8.1 per cent	Green	1,507,878	6.3 per cent

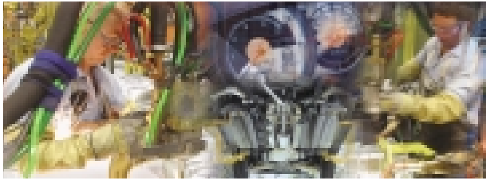
Source: SMMT

Fact or fiction?

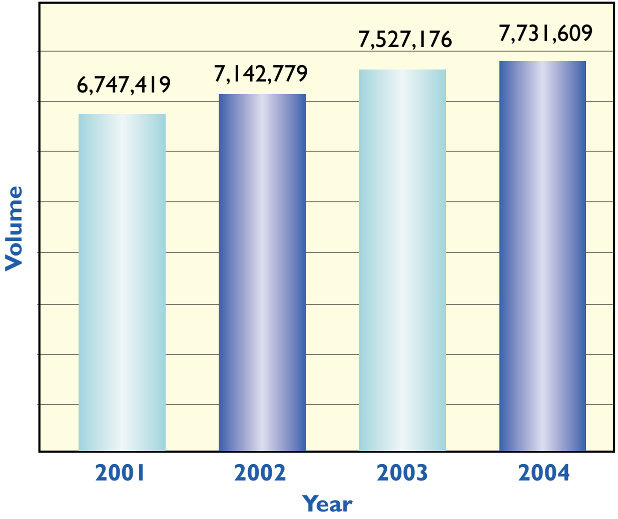
Silver is worth more than gold

Answer: Fact

According to Glass's Guide, as the most popular colour, a silver car can be worth more than any other colour car on the second hand market

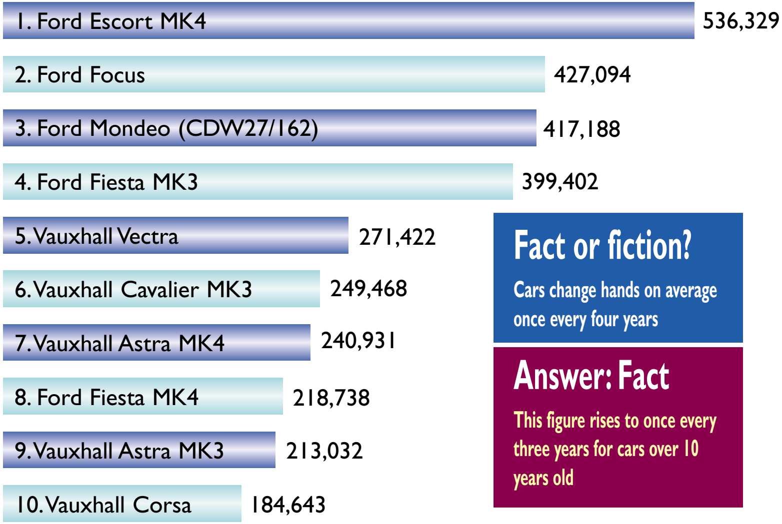


Annual totals of used car sales in GB 2001- 2004



Source: SMMT

Top 10 used car sales - 2004



Used car sales

Fact or fiction?

Cars change hands on average once every four years

Answer: Fact

This figure rises to once every three years for cars over 10 years old

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Car production

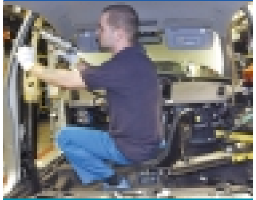
Annual 10 year totals for car production in the UK

Year	Production	% change	Home Market	% change	% of total	Export Market	% change	% of total
1995	1,532,084	4.5%	787,473	-7.2%	51.4%	744,611	20.4%	48.6%
1996	1,686,134	10.1%	777,922	-1.2%	46.1%	908,212	22.0%	53.9%
1997	1,711,923	1.5%	738,494	-5.1%	43.1%	973,429	7.2%	56.9%
1998	1,760,697	2.8%	729,217	-1.3%	41.4%	1,031,480	6.0%	58.6%
1999	1,799,004	2.2%	649,279	-11.0%	36.1%	1,149,725	11.5%	63.9%
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%	582,266	-2.7%	35.7%	1,047,668	17.2%	64.3%
2003	1,657,558	1.7%	513,798	-11.8%	31.0%	1,143,760	9.2%	69.0%
2004	1,646,881	-0.6%	467,138	-9.1%	28.4%	1,179,743	3.1%	71.6%

Source: SMMT

Fact or fiction?

More than seven out of every 10 cars made in the UK are now destined for export markets



Answer: Fact

Output for export hit a record high in 2004 - up three per cent to 1,179,743 units

CV production

Annual 10 year totals for CV production in the UK

Year	Production	% change	Home Market	% change	% of total	Export Market	% change	% of total
1995	237,812	2.5%	144,660	6.7%	60.8%	93,152	-3.5%	39.2%
1996	242,663	2.0%	129,820	-10.3%	53.5%	112,843	21.1%	46.5%
1997	228,412	-5.9%	135,758	4.6%	59.4%	92,654	-17.9%	40.6%
1998	220,899	-3.3%	126,224	-7.0%	57.1%	94,675	2.2%	42.9%
1999	177,823	-19.5%	113,316	-10.2%	63.7%	64,507	-31.9%	36.3%
2000	175,808	-1.1%	98,346	-13.2%	55.9%	77,462	20.1%	44.1%
2001	195,882	11.4%	98,880	0.5%	50.5%	97,002	25.2%	49.5%
2002	191,267	-1.4%	77,032	-20.6%	40.7%	114,235	18.1%	59.3%
2003	188,871	-2.2%	85,954	9.5%	45.5%	102,917	-10.2%	54.5%
2004	209,293	10.8%	81,186	-5.5%	38.8%	128,107	24.5%	61.2%

Source: SMMT

Fact or fiction?

Over one in three heavy commercial vehicles on UK roads are built here

Answer: Fact

Forty per cent of the HCV parc are UK-built with 99 per cent manufactured in Europe

Car manufacturing sites

	Manufacturer	Factory
1.	Aston Martin	Gaydon
2.	Aston Martin	Newport Pagnell
3.	Bentley	Crewe
4.	BMW (MINI)	Oxford
5.	Caterham	Dartford
6.	Honda	Swindon
7.	Jaguar	Halewood
8.	Jaguar	Birmingham
9.	Land Rover	Solihull
10.	Lotus	Norwich
11.	LTI	Coventry
12.	Mercedes-Benz	MTC, Woking
13.	Metrocab	Tamworth
14.	MG Rover (in administration)	Longbridge
15.	Morgan	Malvern
16.	Nissan	Sunderland
17.	Peugeot	Ryton
18.	Rolls-Royce	Goodwood
19.	Toyota	Burnaston
20.	TVR	Blackpool
21.	GM	Ellesmere Port

Source: SMMT

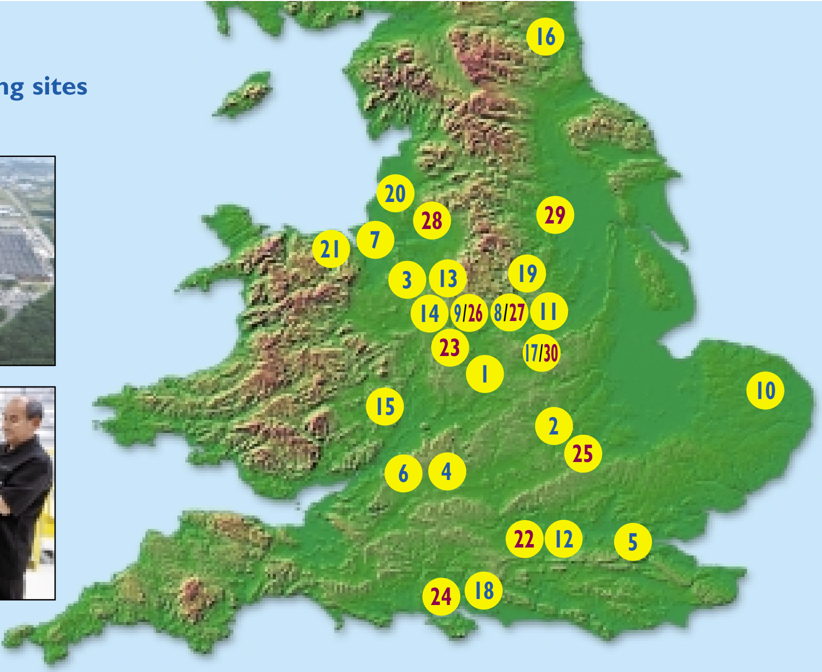
All information correct at time of going to print

Commercial vehicle manufacturing sites

	Manufacturer	Factory
22.	Alexander Dennis	Guildford
23.	Dennis Eagle	Warwick
24.	Ford	Southampton
25.	GM	Luton
26.	Land Rover	Solihull
27.	LDV	Birmingham
28.	Leyland Trucks	Leyland
29.	Optare	Leeds
30.	Peugeot	Ryton

Manufacturing

Map of key UK manufacturing sites



Fact or fiction?

Nissan have invested £2.1 billion at Sunderland since 1985

Answer: Fact

Nissan Motor Manufacturing (UK) has also been named as the most productive car plant in Europe for seven consecutive years, and the biggest UK car plant for six years.

Sixty per cent of Nissan sales in Europe are products built in Sunderland – the Almera, Micra and Primera

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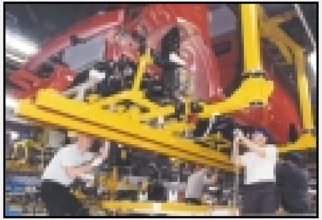
Top five UK car producers 2004

	Manufacturer	Volume
1	Nissan	319,652
2	Toyota	244,799
3	Honda	193,455
4	BMW (MINI)	189,136
5	Peugeot	173,091
	All Manufacturers	**1,646,881**



The IBC Vehicles plant in Luton

Top five CV producers in the UK 2004

	Manufacturer	Volume
1	GM	88,715
2	Ford	69,903
3	Leyland	14,297
4	Land Rover	14,021
5	LDV	7,515
	Total	**209,293**

Top five UK model producers 2004

	Model	Manufacturer	Volume
1	MINI	BMW (MINI)	189,136
2	Avensis	Toyota	177,813
3	206	Peugeot	173,091
4	Micra	Nissan	172,794
5	Astra	Vauxhall	126,037
	All models		**1,646,881**

Source: SMMT

UK automotive sector profile

Sector Profile

	2000	2001	2002	2003
Automotive manufacturing sector turnover	£42.5 billion	£42.6 billion	£44.6 billion	£46 billion
Share of total manufacturing turnover	9.1%	9.2%	9.6%	9.4%
Total net capital investment	£2.08 billion	£2.25 billion	£1.38 billion	£1.66 billion
Total employees directly dependent on the automotive sector	849,100	835,000	850,000	830,000
Value of exports	£19.8 billion	£18 billion	£20.9 billion	£21.5 billion
Percentage of total UK exports	10.5%	9.5%	11.2%	11.3%
All automotive sectors - value added share of GDP	3.4%	3.8%	3.7%	3.7%
UK sector share of global passenger car production	4.0%	3.7%	4.0%	4.0%

Source: SMMT *Data subject to revision*

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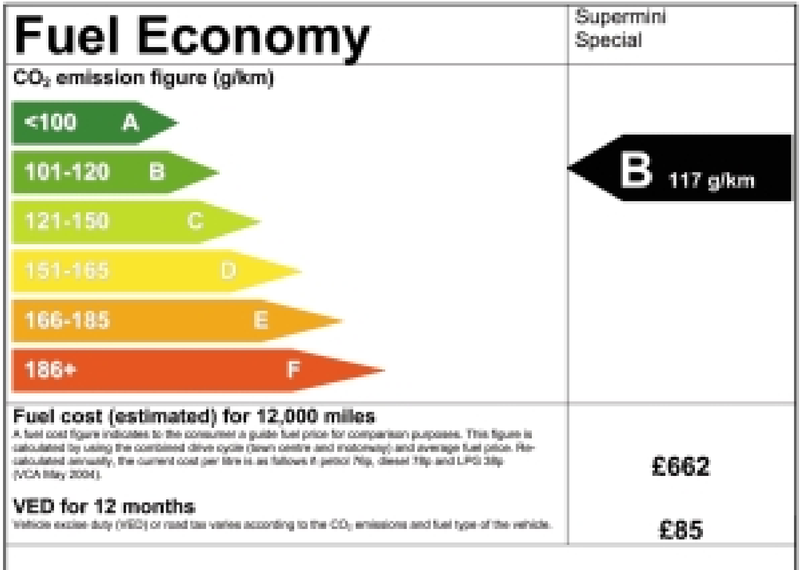
Example of new Green Label



Lowest CO_2 emitting models in each market segment in the UK in 2004

Segment	Model	Fuel	CO_2 g/km	Seg ave	Difference
Mini	Smart Fortwo	Petrol	113	136	-17%
Supermini	Citroën C2	Diesel	107	147	-27%
Lower Medium	Honda Civic	Petrol/Electric	116	162	-28%
Upper Medium	Toyota Prius	Petrol/Electric	104	176	-41%
Executive	Audi A6	Diesel	151	209	-28%
Luxury Saloon	Mercedes S320	Diesel	204	286	-29%
Sports	Honda Insight	Petrol/Electric	80		-66%
	(Vauxhall Tigra)	(Petrol)	(146)	232	(-37%)
Dual Purpose-4x4/SUVs	Toyota Rav4	Petrol	175	244	-28%
MPV	Fiat Doblo	Diesel	147	192	-23%

Environmental Information

A guide on fuel economy and CO_2 emissions which contains data for all new passenger car models is available at any point of sale free of charge. In addition to the fuel efficiency of a car, driving behaviour as well as other non-technical factors play a role in determining a car's fuel consumption and CO_2 emissions. CO_2 is the main greenhouse gas responsible for global warming.

Make/Model: **Supermini Special**	Engine Capacity (cc): **1399**
Fuel type: **Diesel**	Transmission : **5 speed manual**

Fuel Consumption:

Drive cycle	**Litres/100km**	**Mpg**
Urban	5.4	52.3
Extra-urban	3.8	74.3
Combined	4.4	64.2

Carbon dioxide emissions (g/km): 117g/km
Important note: Some specifications of this make/model may have lower CO_2 emissions than this. Check with your dealer.

THE MOTOR INDUSTRY SMMT®   LowCVP low carbon vehicle partnership   Department for Transport   VCA

Source: SMMT

Fact or fiction?

Last year the proportion of cars with CO_2 emissions less than 140g/km was more than three times the share in 1997

Answer: Fact

In 2004, the percentage share was 15.5 per cent. However, in 1997 the figure was only 3.9 per cent

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Taxation

VED rates for new cars - 2005

		Diesel car		Petrol car		Alternative fuel car	
Bands	CO_2 emission figure (g/km)	12 months rate £	6 months rate £	12 months rate £	6 months rate £	12 months rate £	6 months rate £
Band A	Up to 100	75	41.25	65	35.75	55	30.25
Band B	101 to 120	85	46.75	75	41.25	65	35.75
Band C	121 - 150	115	63.25	105	57.75	95	52.25
Band D	151 - 165	135	74.25	125	68.75	115	63.25
Band E	166 - 185	160	88	150	82.5	140	77
Band F	Over 185	170	93.5	165	90.75	160	88

Source: DVLA

Fuel duty

AVERAGE FUEL PRICES

Year	Pump Price (PP)			Percentage of which is tax		
	4 STAR	UNLEADED	DIESEL	4 STAR TAX	UNLEADED TAX	DIESEL TAX
1989	40.0	38.5	36.1	66.0%	59.6%	62.8%
1990	44.8	42.3	40.4	64.0%	58.0%	60.9%
1991	48.3	45.4	44.0	66.6%	62.3%	62.9%
1992	50.1	46.2	45.4	69.4%	65.2%	64.7%
1993	53.7	49.3	49.2	71.7%	66.8%	65.7%
1994	56.1	50.7	50.9	74.2%	71.0%	69.8%
1995	59.1	53.5	53.7	76.4%	74.0%	73.7%
1996	61.4	56.4	57.4	79.0%	76.1%	75.0%
1997	67.2	61.8	62.5	79.4%	77.3%	76.6%
1998	71.1	64.8	65.5	82.7%	81.4%	81.8%
1999	77.2	70.2	72.5	82.6%	81.4%	83.0%
2000	84.9	79.9	81.3	78.9%	75.6%	75.2%
2001	79.7	75.7	77.8	83.5%	76.1%	74.4%
2002	77.0	73.2	75.5	85.9%	77.5%	75.6%
2003	79.9	76.0	77.9	83.8%	75.6%	74.1%
2004	86.1	80.9	82.5	80.2%	73.1%	72.0%

Source: IP data, since 1997 Energy Trends, or AA for latest estimates

Survey of SMMT component member companies as of January 2005

Key findings:

- 33% of respondents say that steel makes up over 50% share value of their material costs
- 87% respondents believe that the average price of steel has risen in 2004 relative to 2003
- 100% of respondents expect to pay more for steel products in 2005 relative to 2004
- 19% of respondents would improve their business process to recover the anticipated increases in steel costs
- 25% of respondents indicated that electricity would be another significant cost increase, with 22% indicating plastics

Notes:
Findings based on replies received from the 105 SMMT member contacts asked. Steel products were finished steel items – coil, sheet/plate, wire, rods

Key commodity prices

Average cost of finished steel (ISBB)

2004	2003	% change
£408 per tonne	£313 per tonne	30%

Average cost of oil per barrel (Brent oil)

2004	2003	% change
$38.4 b/l	$28.9 b/l	33%

Fact or fiction?

There are up to 7,000 manufacturing sites operating in the UK supplying the automotive sector

Answer: Fact

2,000 of these sites have the majority of their business in the automotive industry providing 140,000 jobs and a combined turnover of over £12 billion

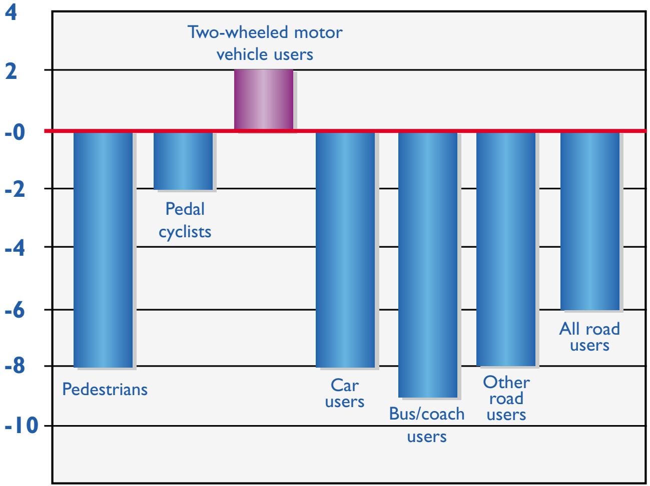
Other commodity prices percentage change Dec 2003 to Dec 2004 (ONS)

Commodity	% change
Electricity	15.2%
Gas	14.7%
Plastics in prime form	9.8%
Imported metals (iron and steel)	29.0%
Rubber	2.6%
Motor vehicles and parts	-1.1%

Killed or seriously injured casualties by road user type 2001 - 2003

	2001	2002	2003
Pedestrians	9,064	8,631	7,933
Pedal cyclists	2,678	2,450	2,411
Two-wheeled motor vehicle users	7,305	7,500	7,652
Car users	19,424	18,728	17,291
Bus/coach users	562	551	500
Other road users	1,527	1,547	1,428
All road users	**40,560**	**39,407**	**37,215**

Percentage change in killed or seriously injured 2002 to 2003



Fact or fiction?

The industry was awarded an acclaimed What Car? award in 2004

Answer: Fact

The industry won the award for the voluntary introduction of ABS as standard in all new models from July 2004

Source: DfT – Road Casualties Great Britain: 2003

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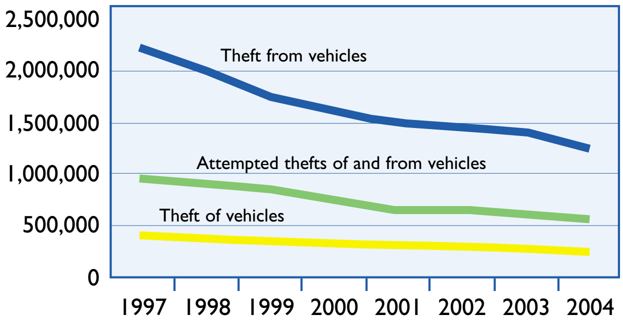
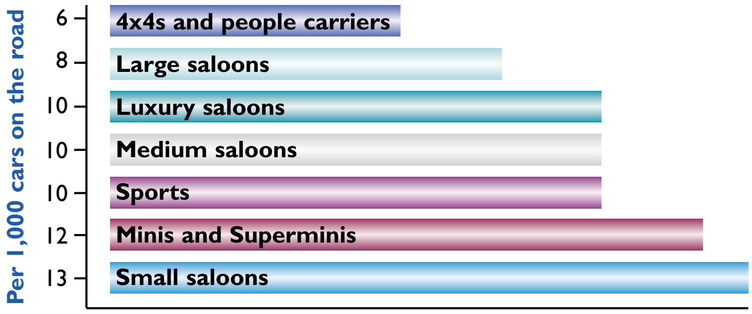
Reduction in vehicle crime 1997 - 2004



Source:
British Crime Survey

Car theft rate by type of vehicle on the road – 2002



Source: Car Theft Index 2003

Fact or fiction?

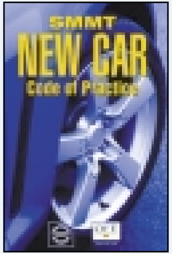
Vehicle crime has fallen by 30 per cent since 1999

Answer: Fact

The Home Office in conjunction with the motor industry, Police and Crime and Disorder Partnerships have all contributed to this decrease

Source: All data taken from the NAO - Reducing Vehicle Crime

The SMMT New Car Code of Practice and Brief Guide



What is the SMMT New Car Code of Practice?
The SMMT New Car Code outlines the promises made by manufacturers to consumers regarding new vehicles.

Who is signed-up to the Code?
Over 99 per cent of new cars registered (MVRIS 2003) are manufactured by Code signatories.

Has the Code been independently approved?
Yes, it was the first Code formally approved by the Office of Fair Trading under the Consumer Codes Approval Scheme.

Who monitors the Code signatories?
Code signatories' performance is monitored by SMMT Regulation and Compliance Unit (RCU), who report results directly to the OFT.

Is consumer satisfaction monitored?
Consumer satisfaction is monitored by targeted and random surveys.

Fact or fiction?

The Code is voluntary, so it has no 'teeth'

Answer: Fiction

Members are issued with penalty points for cases of non-compliance. These are linked to progressive sanctions which can ultimately lead to substantial financial penalties being imposed on SMMT member companies

If I have an enquiry regarding a new car, who should I contact?
You may contact the SMMT Regulation and Compliance Unit by:

Consumer Advice Line:	**0870 7518270**
E-mail enquiries:	www.smmt.co.uk/consumeradvice
Written submissions:	**New Car Code Conciliation Service PO Box 44755 London SW1X 7DS**

www.smmt.co.uk

SMMT Businesses

Driving productivity, skills and innovation

Industry Forum

The Industry Forum programme delivers 'learning by doing' training, teaching companies practical skills to cut waste, improve productivity and lower costs. Now in its tenth year, Industry Forum employs 32 senior engineers and has helped more than 600 companies in the automotive supply chain.

Press contact: Ian Strachan
Telephone: 01543 490932,
e-mail: ian@strachan13.freeserve.co.uk

Automotive Academy

The Automotive Academy was set up in 2004 and has been tasked with delivering a national approach to training, validating the very best courses, trainers and assessors to bring an end to the manufacturing skills shortage.

Press contact: Keith Lewis
Telephone: 020 7344 9263
e-mail: press@automotiveacademy.co.uk

Foresight Vehicle

Funded by DTI, this SMMT managed initiative stimulates R&D in technologies for future vehicles. It guides applicants to funding opportunities, enabling the UK to nurture and grow its home grown talent.

Press contact: Nigel Wonnacott
Telephone: 020 7344 9226
e-mail: nwonnacott@smmt.co.uk

Fact or fiction?

150,000 people are dependent on the UK motor manufacturing industry

Answer: Fiction

Over 800,000 jobs are supported by the motor industry in the UK. The Automotive Academy is the UK industry's answer to addressing the challenges of improving the skills of those in the sector

SMMT Information

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- To buy, order or enquire about data please e-mail **parcweb@smmt.co.uk** or **mvrisweb@smmt.co.uk**
- For economic reports and industry analysis please e-mail **econoweb@smmt.co.uk**
- To become a member, associate or affiliate of SMMT please e-mail **membership@smmt.co.uk**
- To contact the SMMT press office, please e-mail **communications@smmt.co.uk**

For all other enquiries please call 020 7235 7000 or fax 020 7344 7112

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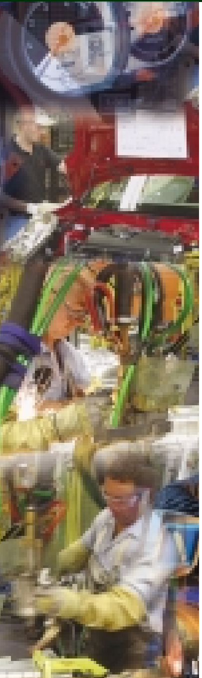

Summary of data

Cars		2004	% change	2003	% change	2002	% change
	Production (UK)	1,646,881	-0.6	1,657,558	1.7	1,629,934	9.2
	Registrations (UK)	2,567,269	-0.5	2,579,050	4.3	2,563,631	10.7
	Used sales (GB)	7,731,609	2.7	7,527,176	5.4	7,142,779	5.9
	On the road (UK)	30,600.000 (estimate)	2.4	29,895,832	2.0	29,320,899	2.5

CVs		2004	% change	2003	% change	2002	% change
	Production (UK)	209,293	10.8	188,871	- 2.2	193,084	- 1.4
	Registrations (UK)	389,923	7.2	363,687	12.9	322.258	2.8
	Used sales (GB)	911,090	8.6	839,361	8.1	776,238	7.1
	On the road (UK)	3,670,000 (estimate)	2.2	3,591,841	2.6	3,501,336	2.4

General	2004	% change	2003	% change	2002	% change
Tax revenue from motorists	£43.1 billion	2.5	£42 billion	2.7	£40.9 billion	0.1
Automotive sector turnover	£47 billion	2.2	£46 billion	3.1	£44.6 billion	4.7
Total employment	810,000	-2.4	830,000	-2.4	850,000	1.7

Source: SMMT

Data is subject to revision

www.smmt.co.uk

The Society of Motor Manufacturers and Traders Limited

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