



SMMT
DRIVING THE
MOTOR INDUSTRY



THE SOCIETY OF MOTOR MANUFACTURERS AND TRADERS MOTOR INDUSTRY FACTS 2014

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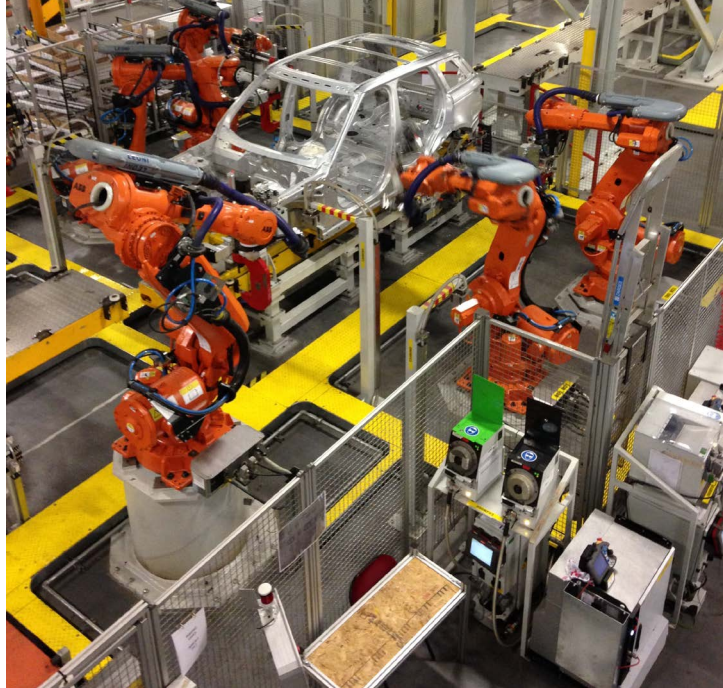
WHAT IS SMMT?

The Society of Motor Manufacturers and Traders (SMMT) supports and promotes the interests of the UK automotive industry at home and abroad. Working closely with member companies, SMMT acts as the voice of the motor industry, promoting its position to government, stakeholders and the media.

SMMT represents more than 600 automotive companies in the UK, providing its members with a forum to voice opinions on issues affecting the automotive sector, guiding strategies and building positive relationships with government and regulatory authorities.

As one of the largest and most influential trade associations operating in the UK, SMMT's resources, reputation and unrivalled automotive data place it at the heart of the UK automotive industry.

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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THE UK IS HOME TO:



1,509,762

Cars built in 2013

87,671

Commercial vehicles built in 2013

2,553,316

Engines built in 2013

2,264,737

New cars registered in 2013

£59.3 billion

Amount generated in turnover each year by UK automotive

1,249,305

Vehicles exported in 2013

731,000

Number of people employed across UK automotive industry

100+

Countries worldwide importing UK-built vehicles

30 million+

Vehicles currently on UK roads



RECENT UK AUTOMOTIVE INVESTMENT ANNOUNCEMENTS



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Bentley **Crewe**

- £800m – new SUV production
- 1,000 jobs



Infiniti **Sunderland**

- £250m – launch of car production in UK
- 1,000 jobs



London Taxi Company **Coventry**

- £150m – restarting of TX Taxi production



Ford **Bridgend**

- £24m – new engine production



Jaguar Land Rover **Solihull**

- £1.5bn – new technologies for future models
- 1,700 jobs



Government/industry **UK-wide**

- Automotive Sector Strategy
- £1bn+ over 10 years – to grow the UK automotive sector

For more info, visit
smtt.co.uk/investment

UK AUTOMOTIVE SUPPLY CHAIN



Number of the world's 20
biggest automotive
suppliers with a UK base

18

Added value typically
generated by UK automotive
suppliers each year

£4.8bn

People employed in
the UK supply chain

82,000

£3bn

Unfulfilled supply
opportunities for domestic
Tier 1 suppliers

80%

Components of a
vehicle that can be
made in the UK

2,350

Automotive
suppliers
in the UK

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UK AUTOMOTIVE: BACKGROUND

In 2012, the UK automotive manufacturing industry...

Turned
over
£59.3bn

Added
£11.9bn
in value to
UK economy

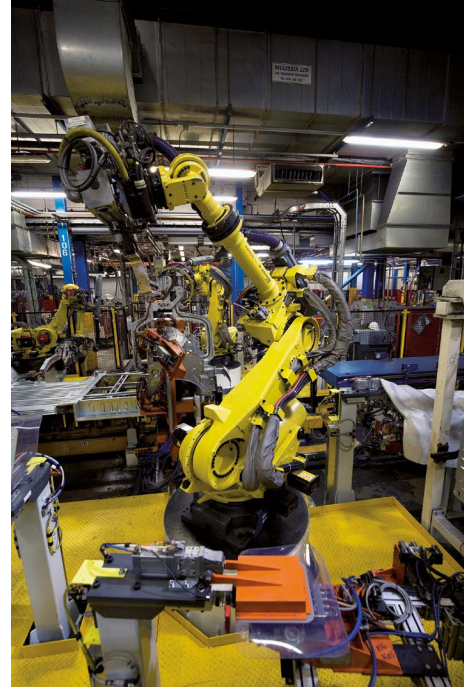
Exported
products
worth
£30.7bn,
accounting
for **10%** of
UK trade
in goods

Invested
£2.1bn
net capital

Accounted
for around
3% of GDP

Invested
£1.7bn in
R&D

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Top fives in production – 2013



Cars by brand

Make	Volume
Nissan	501,756
Land Rover	340,309
Toyota	179,233
MINI	174,997
Honda	138,812

Cars by model

Model	Volume
Nissan Qashqai	286,477
MINI	174,997
Nissan Juke	147,954
Toyota Auris	142,578
Range Rover Evoque	127,302

Commercial vehicles by brand

Make	Volume
Vauxhall	43,797
DAF	15,400
Ford	12,989
Land Rover	10,151
Alexander Dennis	1,949





Top 15 global automotive manufacturers in 2013

Rank	Country	Cars	Commercial vehicles	Total	% change
1	China	18,085,213	4,031,612	22,116,825	14.8%
2	USA	4,346,958	6,698,944	11,045,902	6.9%
3	Japan	8,189,323	1,440,747	9,630,070	-3.1%
4	Germany	5,439,904	278,318	5,718,222	1.2%
5	South Korea	4,122,604	398,825	4,521,429	-0.9%
6	India	3,138,988	741,950	3,880,938	-7.0%
7	Brazil	2,742,309	998,109	3,740,418	9.9%
8	Mexico	1,771,987	1,280,408	3,052,395	1.7%
9	Thailand	1,122,780	1,409,797	2,532,577	4.3%
10	Canada	965,191	1,414,615	2,379,806	-3.4%
11	Russia	1,919,636	255,675	2,175,311	-2.6%
12	Spain	1,719,700	443,638	2,163,338	9.3%
13	France	1,460,000	280,000	1,740,000	-11.6%
14	UK	1,509,762	87,671	1,597,433	1.3%
15	Indonesia	925,111	283,100	1,208,211	13.4%

Top 10 European automotive manufacturers in 2013

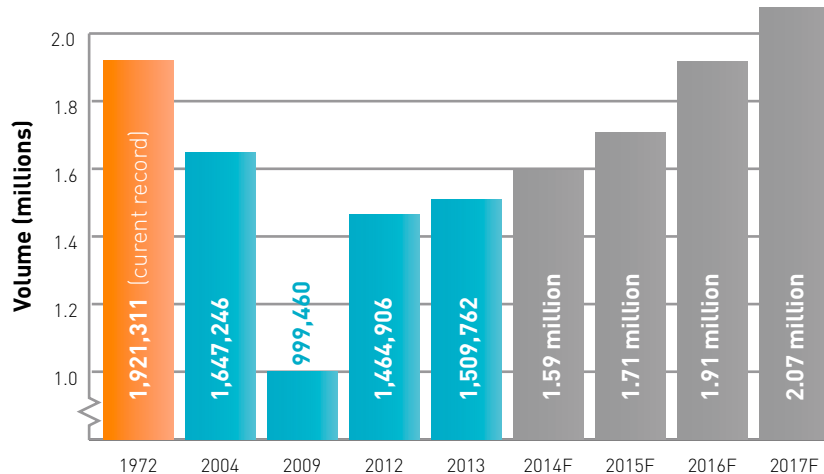
Rank	Country	Cars	Commercial Vehicles	Total	% change
1	Germany	5,439,904	278,318	5,718,222	1.2%
2	Spain	1,719,700	443,638	2,163,338	9.3%
3	France	1,460,000	280,000	1,740,000	-11.6%
4	UK	1,509,762	87,671	1,597,433	1.3%
5	Czech Rep.	1,128,473	4,458	1,132,931	-3.9%
6	Slovakia	975,000	0	975,000	5.2%
7	Italy	388,465	269,742	658,207	-2.0%
8	Poland	475,000	108,258	583,258	-10.9%
9	Belgium	449,600	30,564	480,164	-10.8%
10	Romania	410,959	38	410,997	21.7%

Source: OICA 2013 – some data based on provisional estimates





UK car manufacturing – selected years with AutoAnalysis forecasts 2014-2017



By 2017, analysts suggest that the UK will be making more than **two million cars per year** – higher than the all-time record of 1.92 million in 1972.

UK car manufacturing – 2012 vs 2013

	2012	2013	% Change
Total	1,464,906	1,509,762	3.1%
Home	253,140	308,367	21.8%
Export	1,211,766	1,201,395	-0.9%

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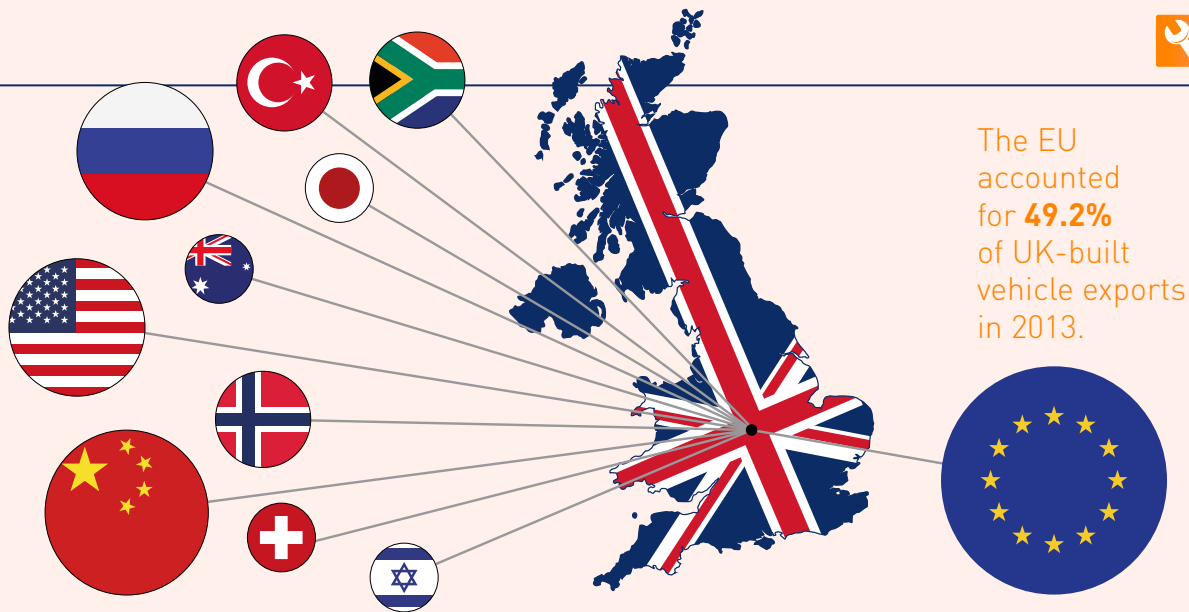


EXPORTS

In 2013, **77.3%** of vehicles built in the UK were exported.

Top 10 export destinations outside the EU

China	10.0%
Russia	9.5%
US	9.2%
Norway	3.4%
Turkey	2.8%
South Africa	2.3%
Switzerland	1.6%
Japan	1.3%
Australia	1.2%
Israel	1.2%



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



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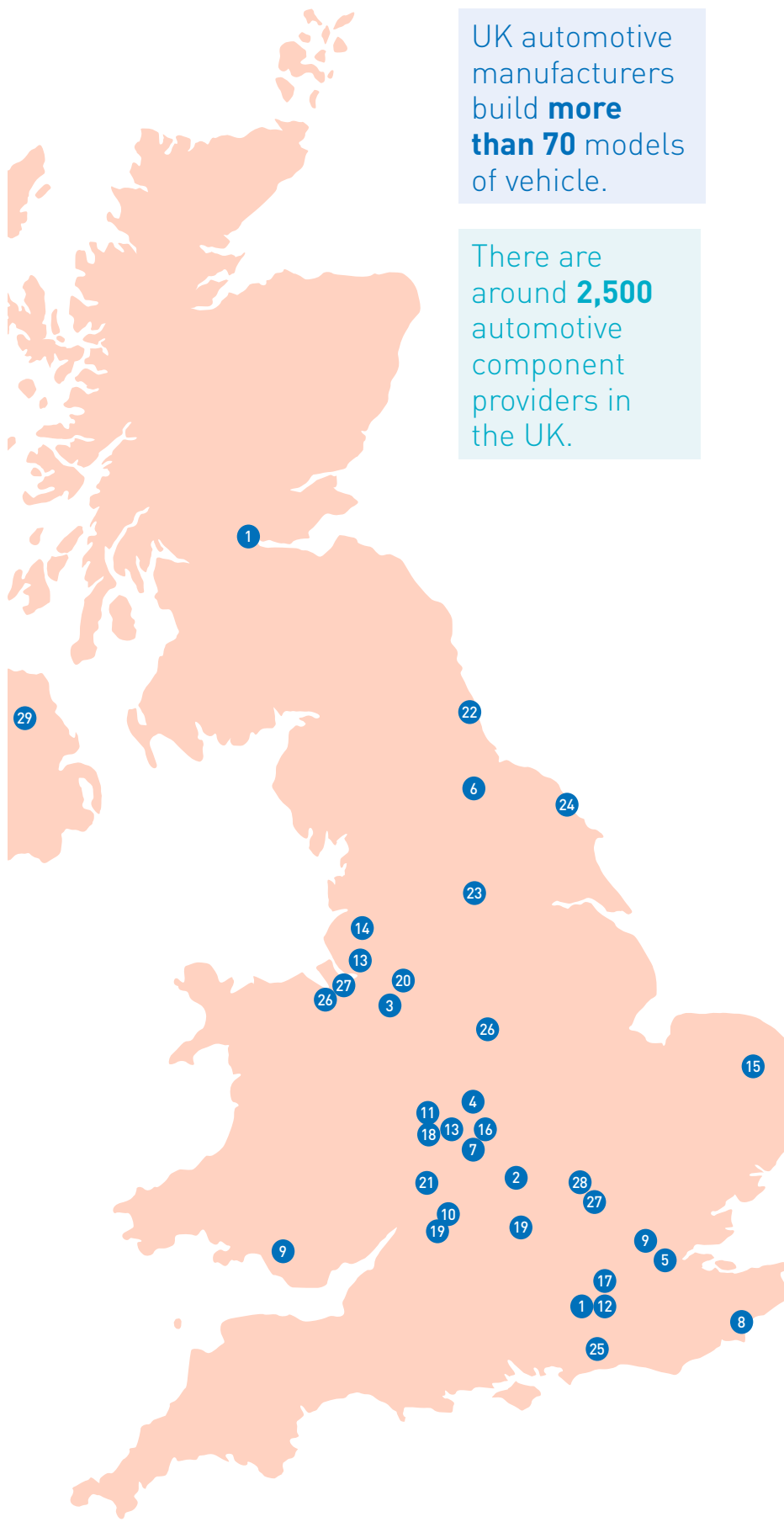


Key UK manufacturing sites

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
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	Car	F-Type, XJ, XF and XK
12	John Dennis Coachbuilders	Guildford	Bus and coach	Minibus range
13	Jaguar Land Rover	Halewood and Solihull	Car	Defender, Discovery, Evoque, Freelander, Range Rover and Range Rover Sport
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	MG Motor	Longbridge	Car	MG3 and MG6
19	MINI	Oxford and Swindon	Car	MINI, MINI Clubman, MINI Coupé, and MINI Roadster
20	Minibus Options	Whaley Bridge	Bus and coach	Minibus range
21	Morgan	Malvern	Car	Aero, Aero Supersport, Aero Coupe, 4/4, Plus 4, Plus 8, Roadster, 4 Seater and 3 Wheeler
22	Nissan	Sunderland	Car and engine	Juke, LEAF, Note and Qashqai
23	Optare	Leeds	Bus and coach	Solo, Tempo and Versa bus range
24	Plaxton	Scarborough	Bus and coach	Cheetah, Elite, Panther, Paragon coach bodies and Enviro bus range
25	Rolls-Royce	Goodwood	Car	Ghost, Phantom and Wraith
26	Toyota	Burnaston and Deeside	Car and engine	Auris and Avensis
27	Vauxhall	Ellesmere Port and Luton	Car, CV and bus and coach	Astra, Vivaro van and minibus range
28	Warnerbus	Dunstable	Bus and coach	Minibus range
29	Wrightbus	Ballymena (NI)	Bus and coach	Bus range

UK automotive manufacturers build **more than 70** models of vehicle.

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



UK automotive manufacturers produced **1,597,433** vehicles in 2013.

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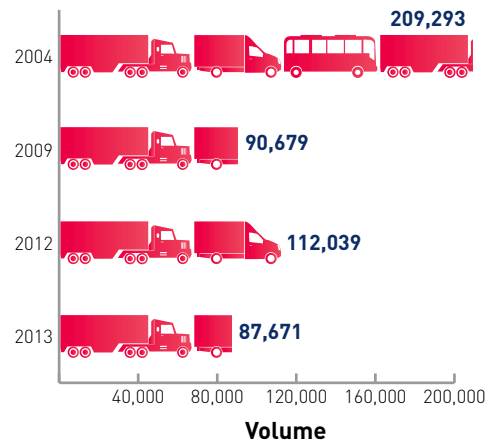


UK AUTOMOTIVE MANUFACTURING



Commercial vehicles and engines

UK CV manufacturing volumes

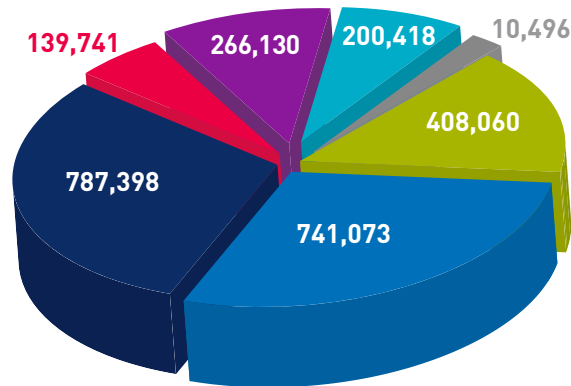


UK CV manufacturing – 2013 vs 2012

	2012	2013	% Change
Total	112,039	87,671	-21.7%
Home	48,306	39,761	-17.7%
Export	63,733	47,910	-24.8%
% export	56.9%	54.6%	



UK engine manufacturing volumes – 2013



■ Bentley ■ Ford (Bridgend) ■ Honda ■ Toyota
■ BMW ■ Ford (Dagenham) ■ Nissan

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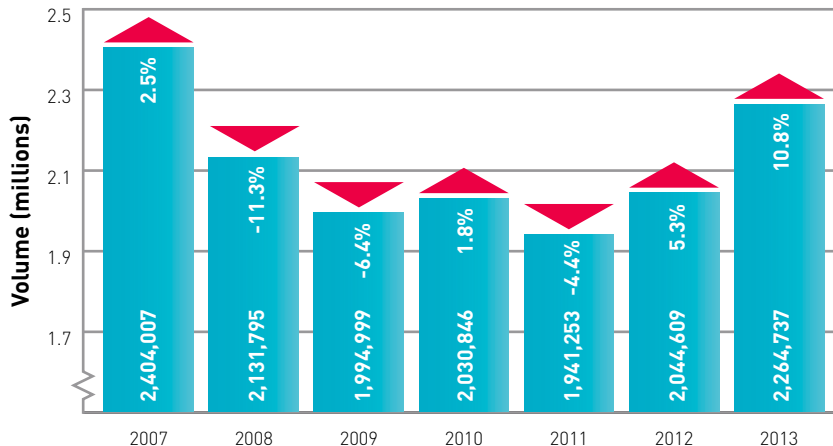
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UK new car registration volumes – 2007-2013



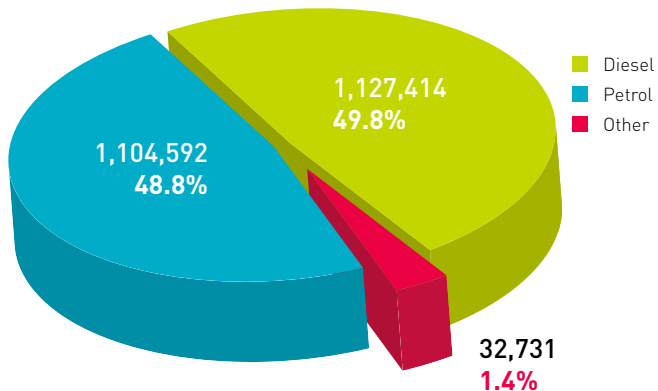
2,264,737
new cars
were
registered
in 2013

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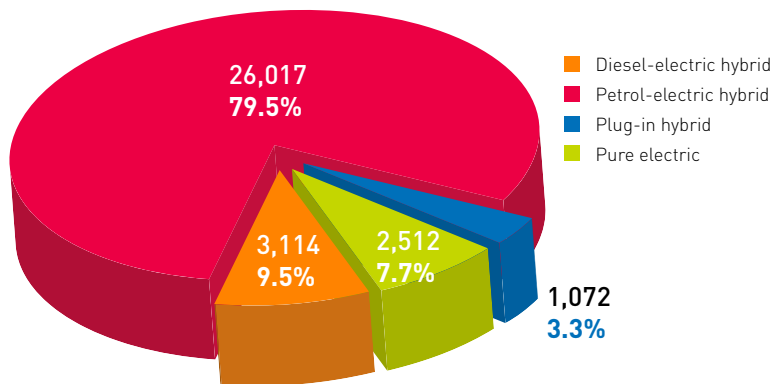
Top 10 sellers in 2013

	Model	Volume
1	Ford Fiesta	121,929
2	Ford Focus	87,350
3	Vauxhall Corsa	84,275
4	Vauxhall Astra	68,070
5	Volkswagen Golf	64,951
6	Nissan Qashqai	50,211
7	BMW 3 Series	43,494
8	Volkswagen Polo	42,609
9	BMW 1 Series	41,883
10	Peugeot 208	38,616

2013 new car registrations by fuel type

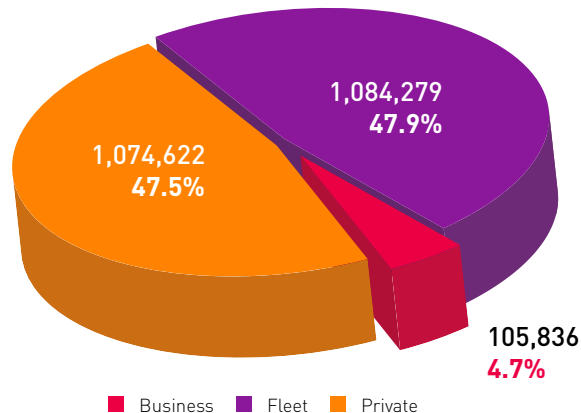


2013 alternatively-fuelled vehicle registrations by type



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MORE INFO

2013 new car registrations by sales type



Top five new car registrations in 2013 by sales type



Business

Model	Volume
Vauxhall Corsa	10,390
Ford Fiesta	4,952
Citroen C1	4,290
Ford Focus	3,407
Nissan Note	3,207



Fleet

Model	Volume
Ford Focus	55,017
Vauxhall Astra	49,386
Volkswagen Golf	43,441
Ford Fiesta	42,279
Vauxhall Corsa	39,332



Private

Model	Volume
Ford Fiesta	74,698
Vauxhall Corsa	34,553
Ford Focus	28,926
Volkswagen Polo	28,045
Fiat 500	25,989

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Top cars registered by segment



Mini



Supermini



Lower Medium

Model	Volume	Segment share
Hyundai i10	22,955	28.6%
Volkswagen up!	21,143	26.3%
Suzuki Alto	13,471	16.8%
Skoda Citigo	7,610	9.5%
Vauxhall Agila	3,988	5.0%

Segment total: 80,377

Model	Volume	Segment share
Ford Fiesta	121,929	15.0%
Vauxhall Corsa	84,275	10.4%
Volkswagen Polo	42,609	5.2%
Peugeot 208	38,616	4.7%
Fiat 500	37,918	4.7%

Segment total: 813,092

Model	Volume	Segment share
Ford Focus	87,350	14.8%
Vauxhall Astra	68,070	11.6%
Volkswagen Golf	64,951	11.0%
Nissan Qashqai	50,211	8.5%
BMW 1 Series	41,883	7.1%

Segment total: 588,402

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Top cars registered by segment



Model	Volume	Segment share
BMW 3 Series	43,494	20.9%
Vauxhall Insignia	28,383	13.6%
Audi A4	21,879	10.5%
Volkswagen Passat	17,139	8.2%
Ford Mondeo	16,230	7.8%

Segment total: 208,462



Model	Volume	Segment share
Mercedes-Benz C-Class	30,991	25.9%
Mercedes-Benz E-Class	28,833	24.1%
BMW 5 Series	20,552	17.2%
Audi A6	15,017	12.5%
Jaguar XF	12,606	10.5%

Segment total: 119,745



Model	Volume	Segment share
Mercedes-Benz S-Class	1,558	18.7%
Jaguar XJ	1,344	16.1%
Mercedes-Benz SL	1,297	15.5%
Audi A8	1,174	14.1%
BMW 7 Series	1,045	12.5%

Segment total: 8,346

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Top cars registered by segment



Model	Volume	Segment share
Audi TT	6,870	14.4%
Mercedes-Benz SLK	5,310	11.2%
Volkswagen Scirocco	5,029	10.6%
Mazda MX-5	3,285	6.9%
BMW 6 Series	2,902	6.1%

Segment total: 47,544



Model	Volume	Segment share
Kia Sportage	20,796	8.4%
Range Rover Evoque	20,287	8.2%
Honda CR-V	15,548	6.3%
Ford Kuga	13,904	5.6%
Land Rover Freelander	13,899	5.6%

Segment total: 248,003



Model	Volume	Segment share
Vauxhall Zafira	27,202	18.0%
Ford C-Max	20,335	13.5%
Ford B-Max	15,896	10.5%
Mercedes-Benz B-Class	7,809	5.2%
Ford S-Max	7,707	5.1%

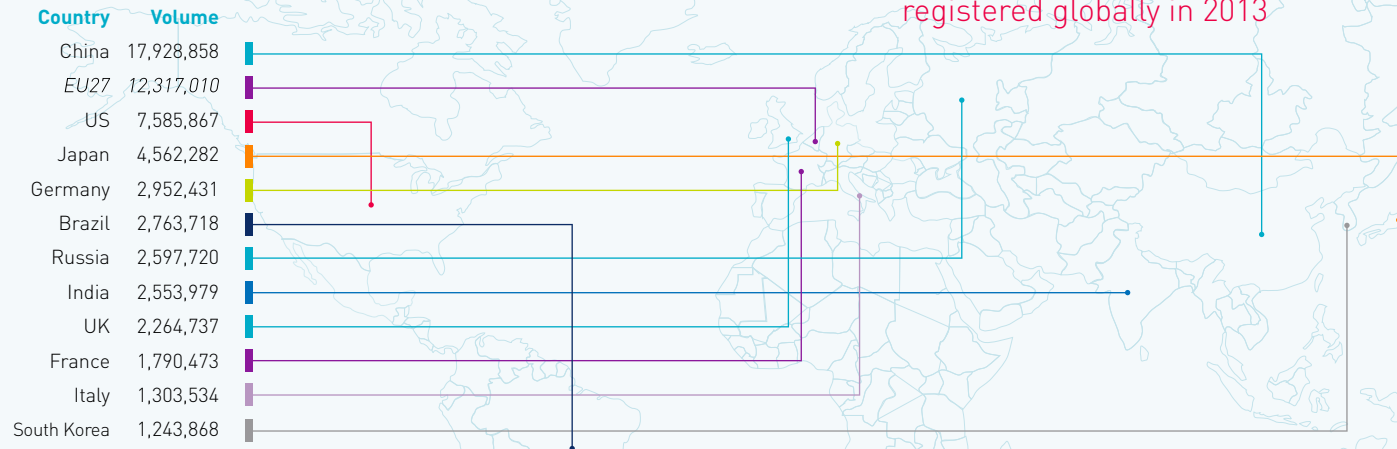
Segment total: 150,766



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International new car registrations – 2013



Source: OICA 2013

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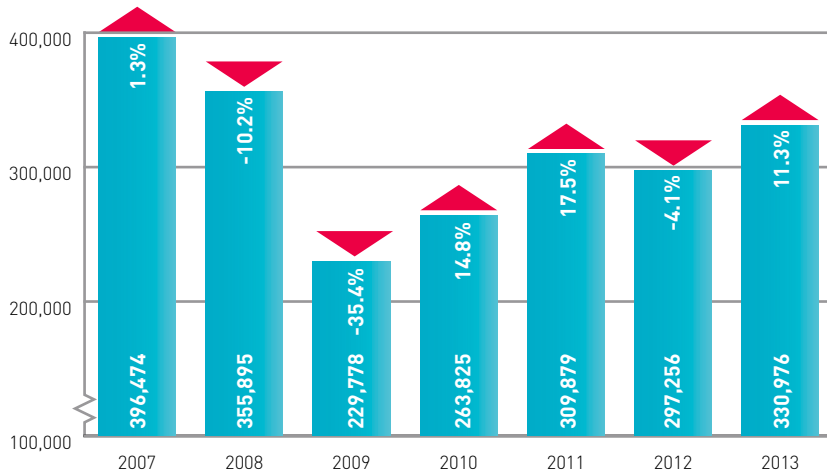
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Commercial vehicle registrations – 2007-2013



2013 commercial vehicle registrations

	LCVs up to 3.5t	Rigids	Artics	Bus and coach
Volume	271,073	33,651	22,567	3,685
% change	13.1	17.6	32.0	-3.3



330,976
commercial
vehicles were
registered
in 2013.

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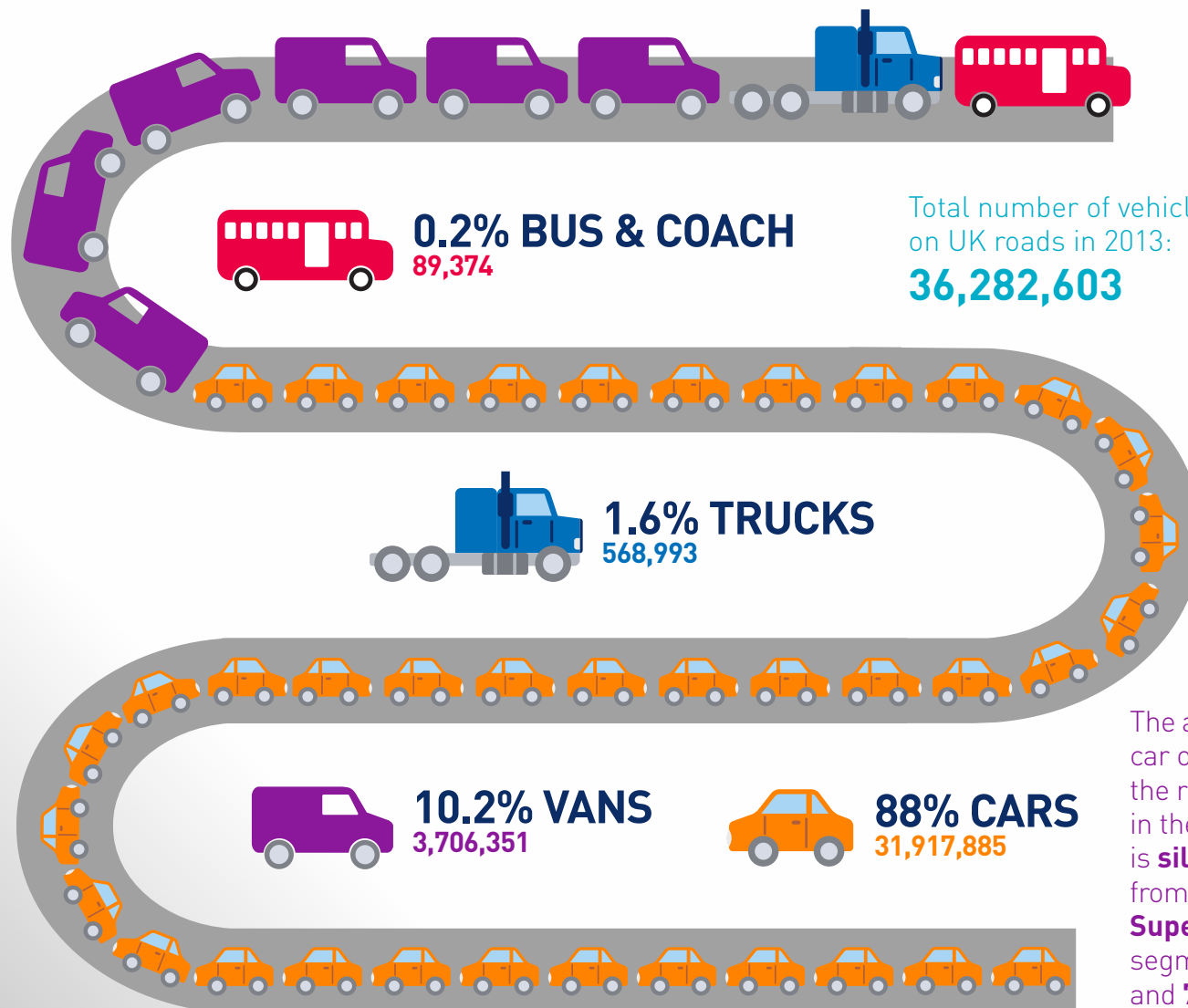
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The average car on the road in the UK is **silver**, from the **Supermini** segment and **7.7** years old.

Slough is the most fuel efficient town in the UK.
The average car in Slough achieves **more than 50mpg**.

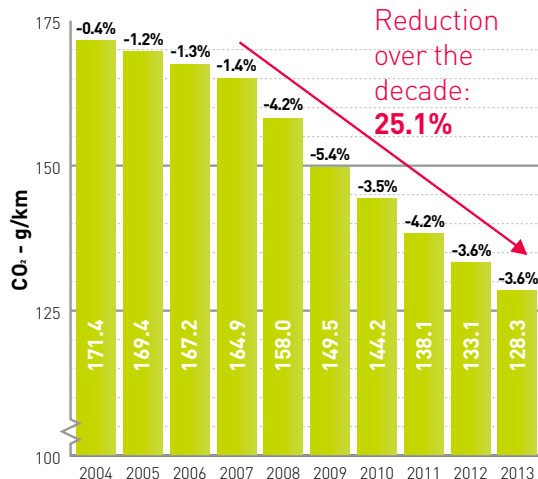
You are most likely to see a **pink** car in Ipswich.



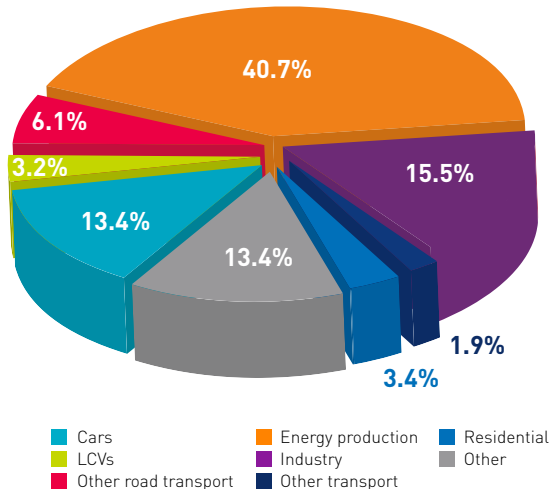
ENVIRONMENT



UK average CO₂ emissions in new cars – 2004-2013



CO₂ emissions by sector



More than **85%** of each vehicle is recycled at the end of its life.

A new car in 2013 was typically **14.2%** more fuel-efficient than one in 2009.

The per vehicle energy usage and CO₂ emissions from UK production facilities have been reduced by **more than 20%** over the last decade.

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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 20 years ago, 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 PUBLICATIONS AND USEFUL LINKS

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 2013**
<http://www.smmmt.co.uk/co2report>

(The 2014 edition of the New Car CO₂ Report will be launched in April 2014)

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 Emissions 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
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SMMT Industry Forum
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