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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UK AUTOMOTIVE AT A GLANCE

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

THE UK IS HOME TO:

RECENT UK AUTOMOTIVE INVESTMENT ANNOUNCEMENTS

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

Ford
Bridgend
- £24m – new engine production

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

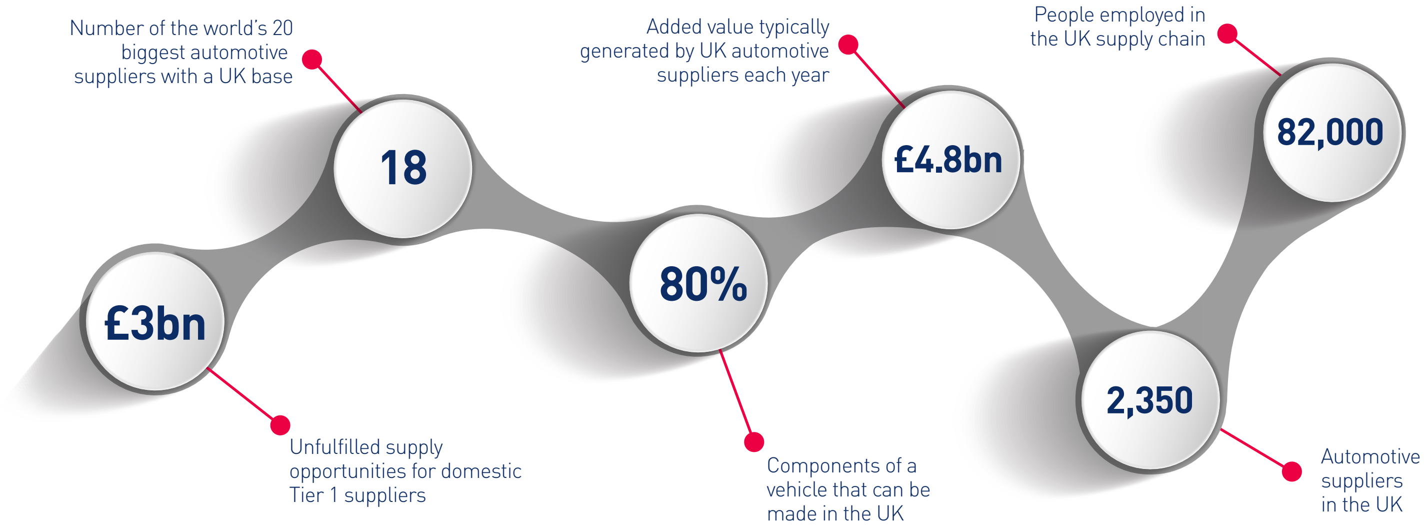
Jaguar Land Rover
Solihull
- £1.5bn – new technologies for future models
- 1,700 jobs

London Taxi Company
Coventry
- £150m – restarting of TX Taxi production

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

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

UK AUTOMOTIVE SUPPLY CHAIN



UK AUTOMOTIVE SKILLS

731,000
people employed across UK automotive

146,000
people directly employed in manufacturing

39% increase
in apprenticeship take-up over the last two years (Semta)

38,500
people employed in UK motorsport – 25,000 are engineers
(Motorsport Industry Association)

100,000
new automotive jobs to be created by 2020

UK AUTOMOTIVE: BACKGROUND

In 2012, the UK automotive manufacturing industry...

Turned over **£59.3bn**

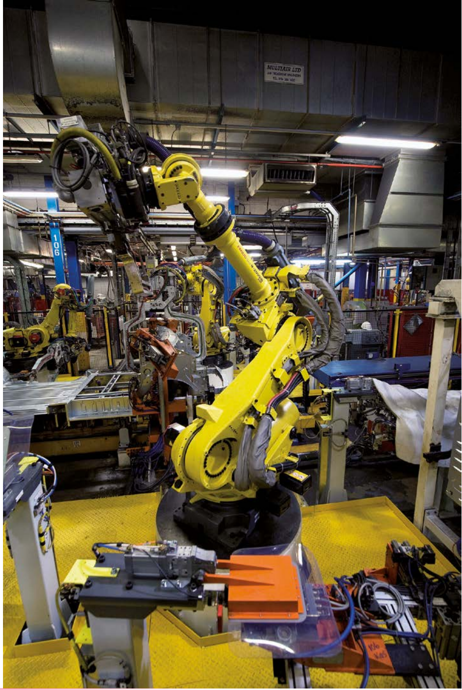
Added **£11.9bn** in value to UK economy

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



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

GLOBAL AUTOMOTIVE MANUFACTURING

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%

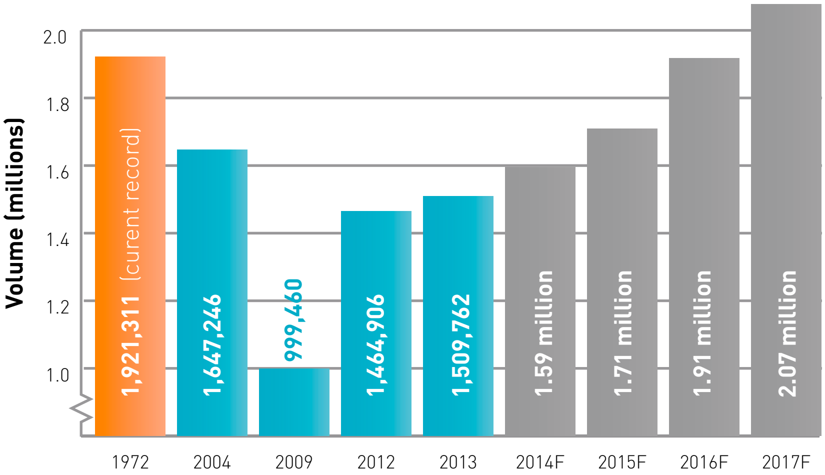
Top 10 European automotive manufacturers in 2013

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 AUTOMOTIVE MANUFACTURING

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



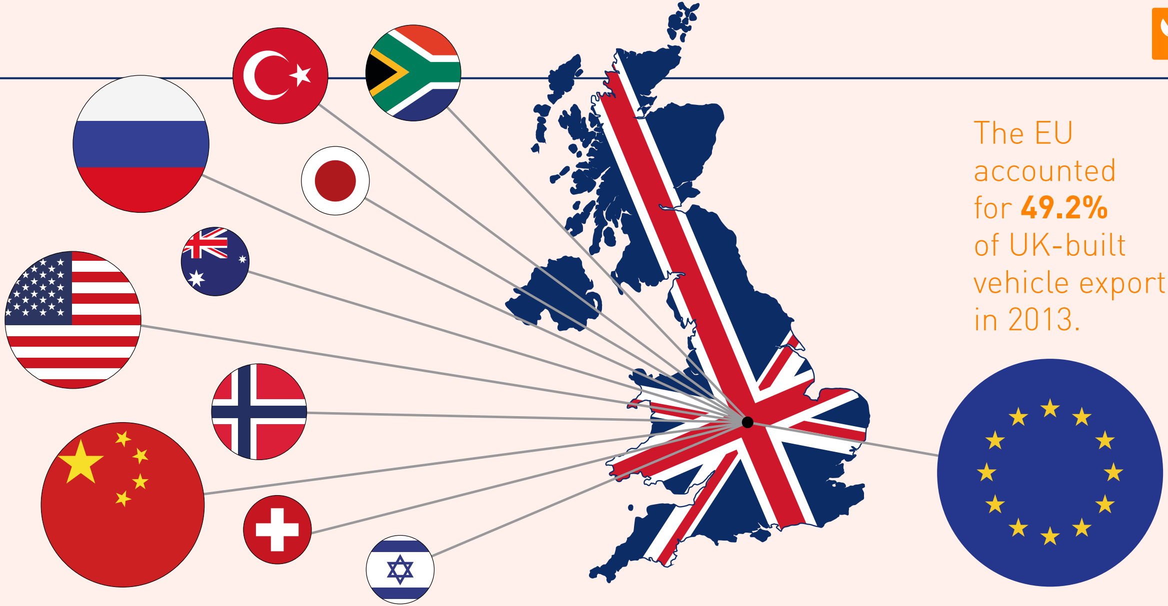
By 2017, analysts suggest that the UK will be making more than **two million cars per year**- higher than the all-time record of 1.92 million in 1972.

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%

EXPORTS

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



The EU accounted for **49.2%** of UK-built vehicle exports in 2013.

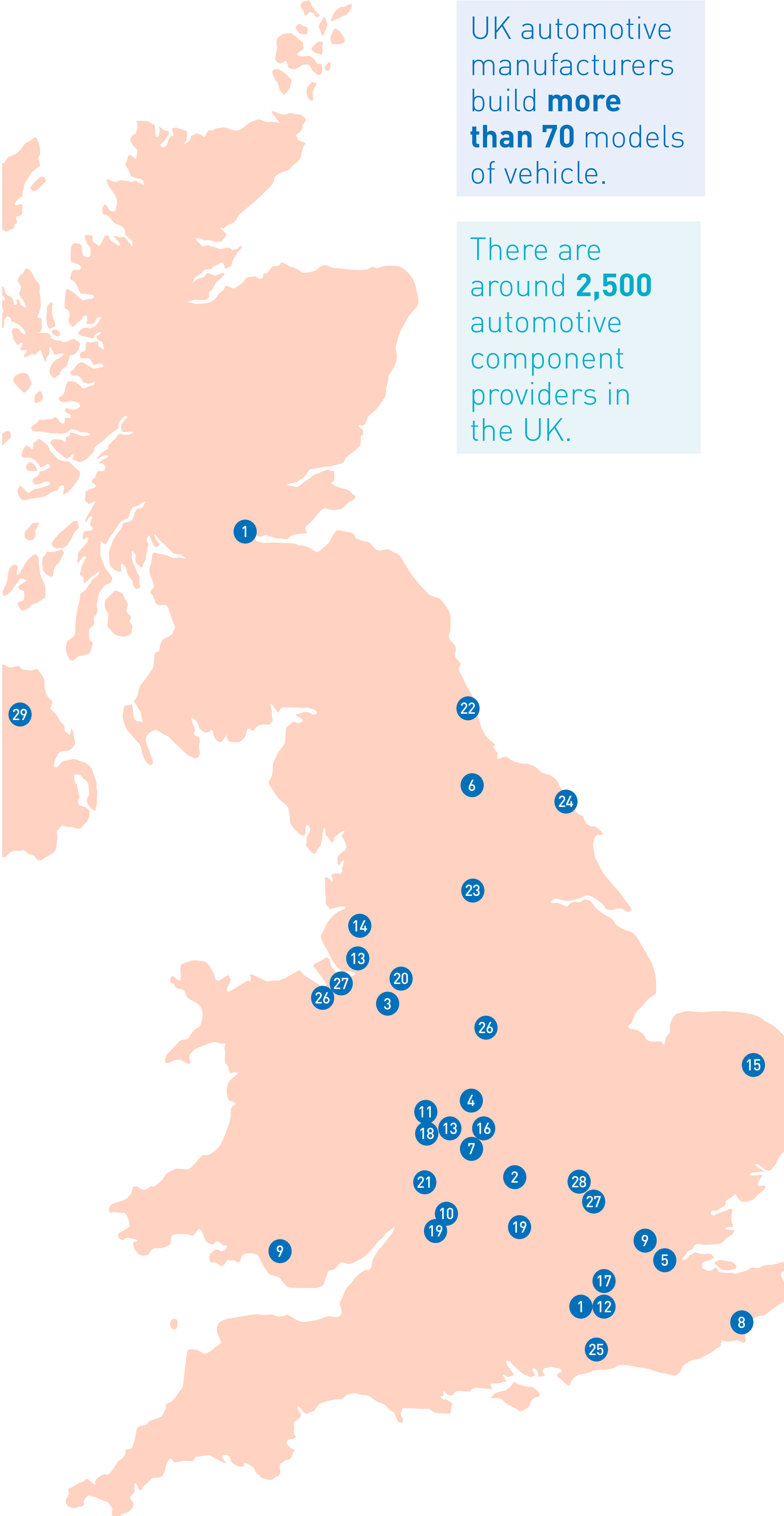
Top 10 export destinations outside the EU

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.

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



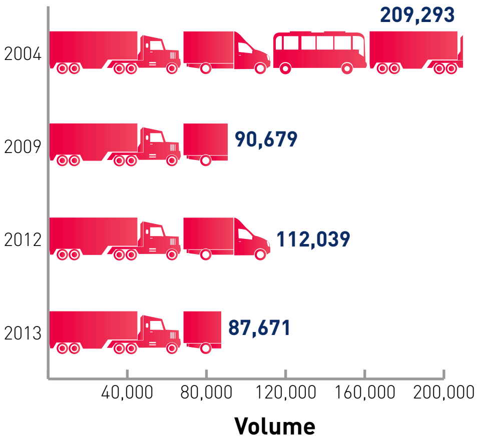
UK automotive manufacturers build **more than 70** models of vehicle.

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

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

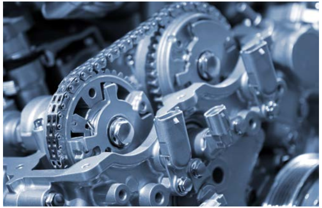
Commercial vehicles and engines

UK CV manufacturing volumes

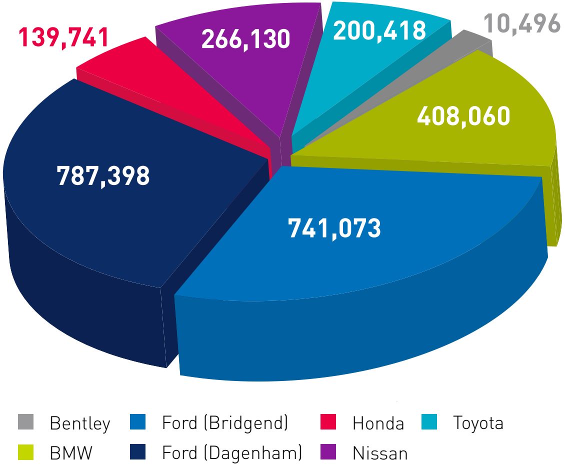


UK CV manufacturing – 2013 vs 2012

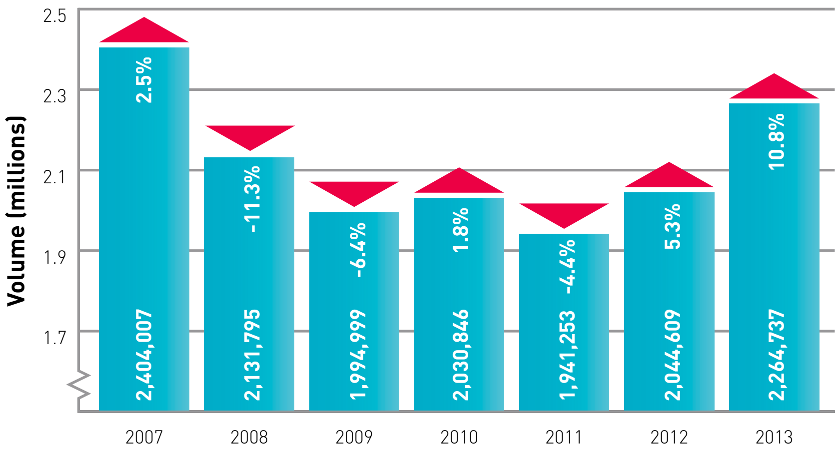
	2012	2013	% Change
Total	112,039	87,671	-21.7%
Home	48,306	39,761	-17.7%
Export	63,733	47,910	-24.8%
% export	56.9%	54.6%	



UK engine manufacturing volumes – 2013



UK new car registration volumes – 2007-2013

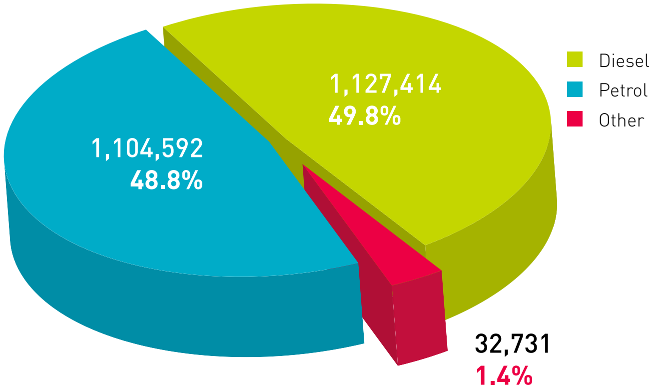


2,264,737 new cars were registered in 2013

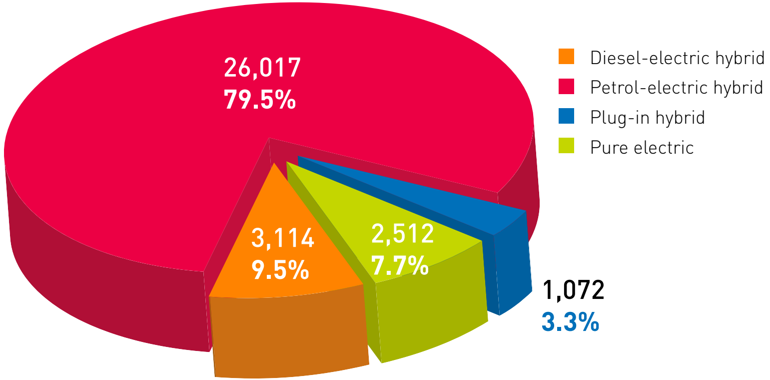
Top 10 sellers in 2013

	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

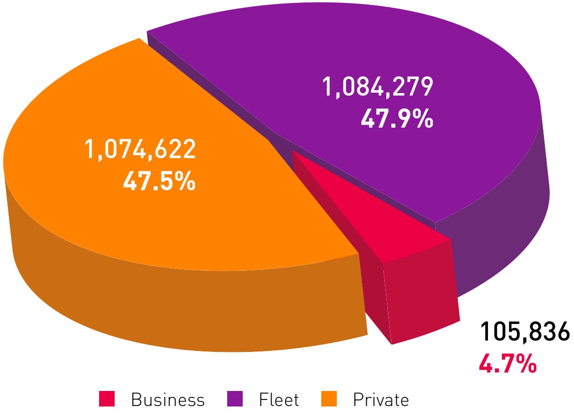


2013 alternatively-fuelled vehicle registrations by type



REGISTRATIONS

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

Top cars registered by segment

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

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

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%

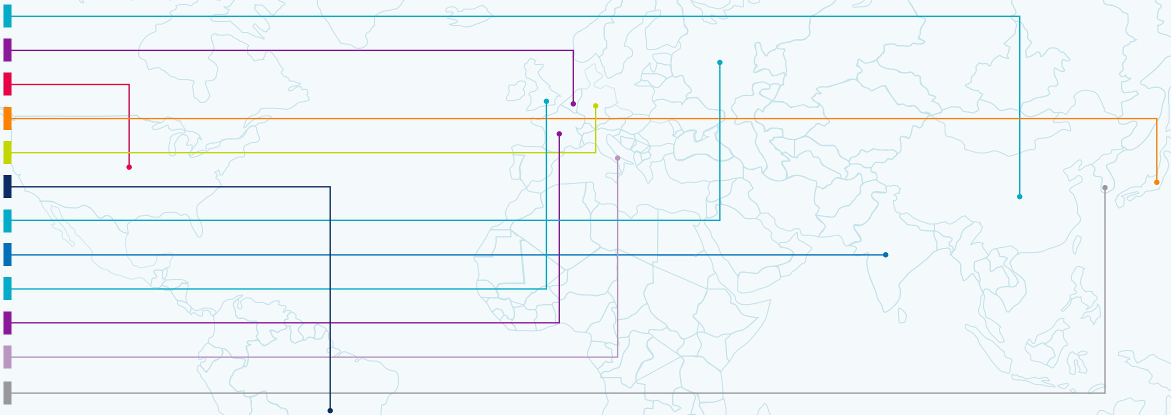
Segment total: 248,003

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

International new car registrations – 2013

Country	Volume
China	17,928,858
EU27	*12,317,010*
US	7,585,867
Japan	4,562,282
Germany	2,952,431
Brazil	2,763,718
Russia	2,597,720
India	2,553,979
UK	2,264,737
France	1,790,473
Italy	1,303,534
South Korea	1,243,868

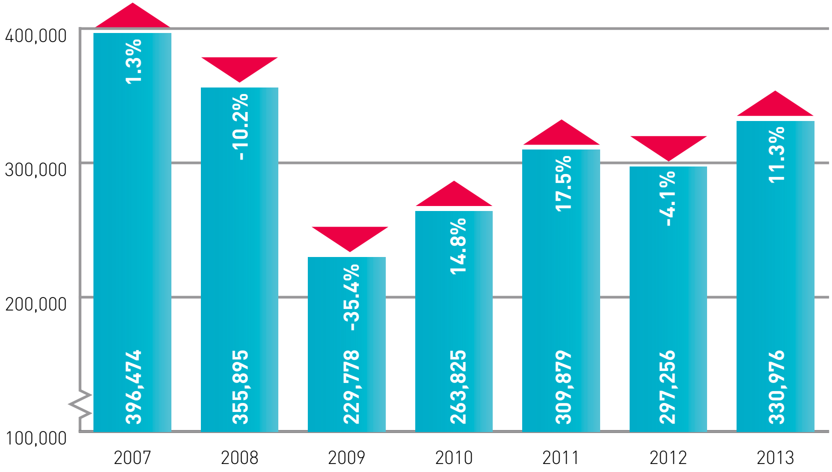


62,644,460 new cars were registered globally in 2013

Source: OICA 2013

REGISTRATIONS

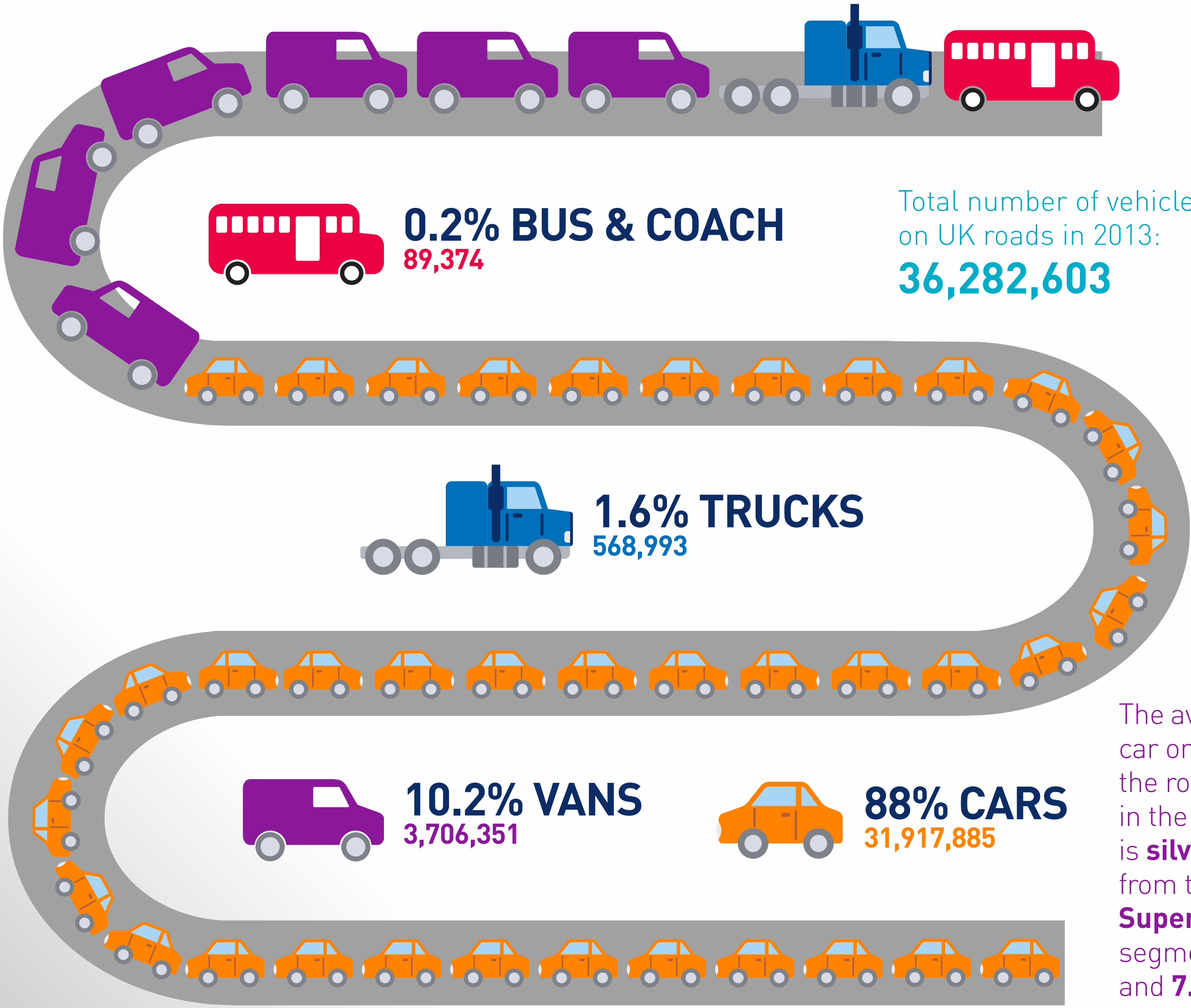
Commercial vehicle registrations – 2007-2013



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.



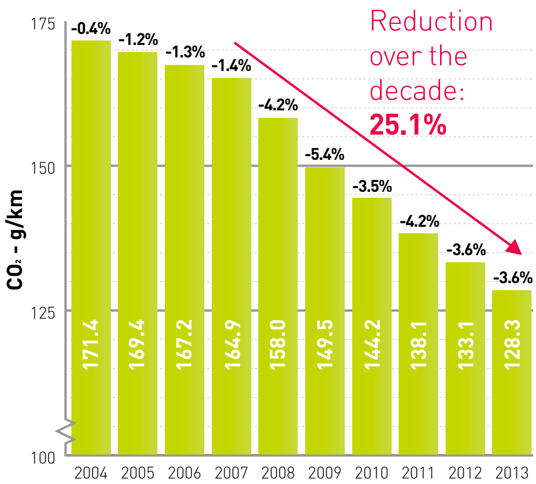
Total number of vehicles on UK roads in 2013:
36,282,603

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

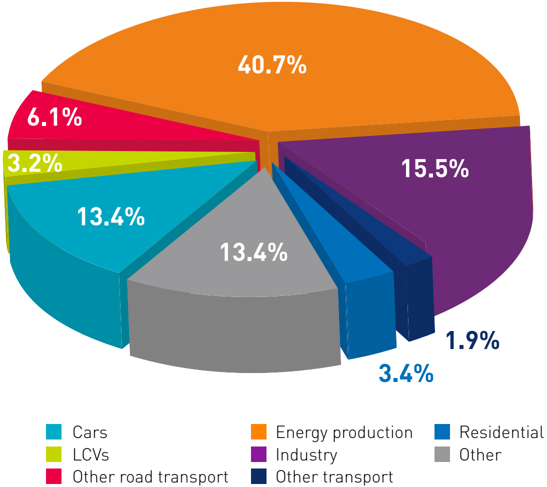
Slough is the most fuel efficient town in the UK. The average car in Slough achieves **more than 50mpg**.

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

UK average CO_2 emissions in new cars – 2004-2013



CO_2 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 CO_2 emissions from UK production facilities have been reduced by **more than 20%** over the last decade.

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

SMMT PUBLICATIONS AND USEFUL LINKS

SMMT reports and publications

- **Annual Sustainability Report**
  www.smmt.co.uk/sustainability
- **Dealer Energy Efficiency Guide**
  www.smmt.co.uk/dealerenergyefficiency
- **Invest Now Report**
  http://www.smmt.co.uk/invest-now/
- **New Car CO_2 Report 2013**
  http://www.smmt.co.uk/co2report

(The 2014 edition of the New Car CO_2 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
www.smmt.co.uk/aai

SMMT Industry Forum
www.industryforum.co.uk

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