SMMT
DRIVING THE
MOTOR INDUSTRY

SMMT MOTOR INDUSTRY FACTS 2020

WHAT IS SMMT?

The Society of Motor Manufacturers and Traders (SMMT) is one of the largest and most influential trade associations 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 800 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.smmt.co.uk/memberservices** or email **membership@smmt.co.uk**

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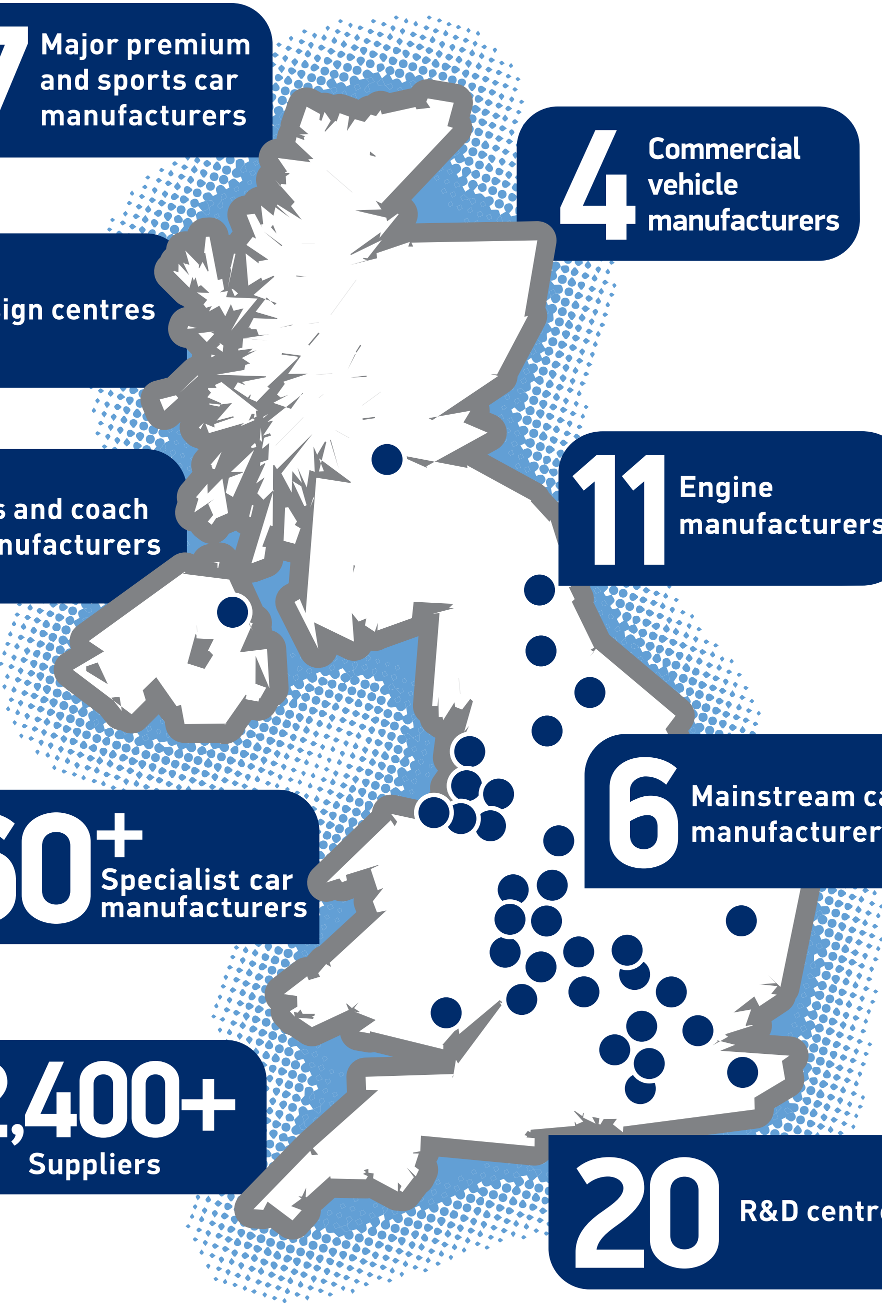
UK AUTOMOTIVE AT A GLANCE



7 Major premium and sports car manufacturers

4 Commercial vehicle manufacturers

5 Design centres

8 Bus and coach manufacturers

11 Engine manufacturers

6 Mainstream car manufacturers

60+ Specialist car manufacturers

2,400+ Suppliers

20 R&D centres

£78.9 billion
UK automotive turnover in 2019

2,311,140
New cars registered in 2019

150+
Countries importing UK-built vehicles

1,055,997
Cars exported in 2019

864,300
People employed across UK Auto

35.1 million
Cars currently on UK roads

1,303,135
Cars built in 2019

78,270
Commercial vehicles built in 2019

2,520,165
Engines built in the UK 2019

UK AUTOMOTIVE EMPLOYMENT

864,300
people employed across UK Automotive

180,300
people directly employed in manufacturing

59,000
young people began engineering and manufacturing apprenticeships in 2017/8
(Semta)

20,000
new jobs forecast to be created in automotive sector by 2030

41,000
people employed in UK motorsport – 25,000 are engineers
(Motorsport Industry Association)

UK AUTOMOTIVE: BACKGROUND

In 2019 the UK automotive manufacturing industry...

Turned over **£78.9 billion**

Invested **£3.1 billion** net capital

Exported products worth **£42.4 billion,** accounting for **13%** of the UK's total export goods

Invested **£3.72 billion** in R&D

Added **£15.3 billion** in value to the UK economy

Source: 2019 UK Automotive Sustainability Report

UK AUTOMOTIVE MANUFACTURING

Top fives in production – 2019

Cars by brand

Make	Volume
Jaguar Land Rover	385,197
Nissan	346,535
Mini	221,928
Toyota	148,106
Honda	108,876

Cars by model

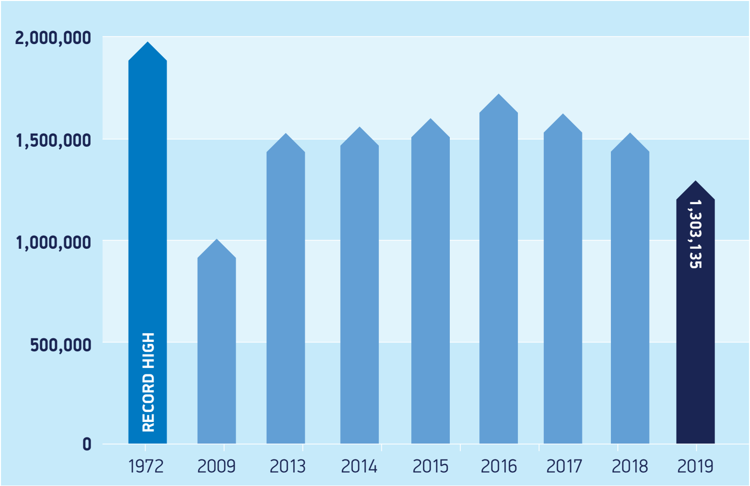
Model	**Volume** (production)
Nissan Qashqai	257,851
Mini Mini	178,657
Toyota Corolla	148,106
Honda Civic	108,876
Land Rover Range Rover Sport	77,665

Commercial vehicles by brand

Make	Volume
Groupe PSA	55,003
Leyland Trucks	17,965
LEVC	2,439
Alexander Dennis	1,263
Dennis Eagle	918

UK CAR MANUFACTURING

UK car manufacturing



1.30M
cars built in the UK in 2019

UK car manufacturing – 2018 vs 2019

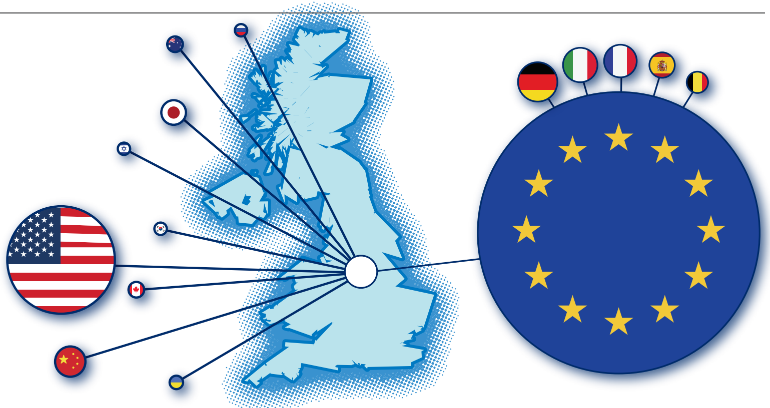
	YTD 2018	YTD 2019	% Change
Total	1,519,440	1,303,135	-14.2%
Home	281,832	247,138	-12.3%
Export	1,237,608	1,055,997	-14.7%
% Export	81.5%	81.0%	

UK CAR EXPORTS

1,055,997
cars manufactured for export in 2019

8 out of 10
cars made in the UK are exported

The UK exports to more than
150
markets worldwide



TOP EXPORT DESTINATIONS FOR UK CARS

Worldwide						EU27
EU27	578,467	54.8%	China	55,739	5.3%	Germany
U.S.A.	199,599	18.9%	Spain	35,984	3.4%	Italy
GERMANY	102,284	9.7%	Japan	33,589	3.2%	France
ITALY	73,832	7.0%	Belgium	29,791	2.8%	Spain
FRANCE	71,019	6.7%	Canada	23,073	2.2%	Belgium

GLOBAL AUTOMOTIVE MANUFACTURING

Top 16 global automotive manufacturers in 2019

Rank	Country	Cars	Commercial vehicles	Total	% change
1	China	21,360,193	2,002,284	23,362,477	-7.5%
2	USA	2,512,780	8,020,873	10,533,653	-3.7%
3	Japan	8,328,756	839,895	9,168,651	-0.5%
4	Germany	4,661,328	Not available	4,661,328	-9.0%
5	India	3,623,335	571,428	4,194,763	-12.2%
6	South Korea	3,612,587	338,030	3,950,617	-1,9%
7	Mexico	1,382,714	2,390,147	3,772,861	-2.8%
8	Brazil	2,448,490	355,351	2,803,841	2.2%
9	Spain	2,248,019	524,504	2,772,523	0.1%
10	France	1,675,198	527,262	2,202,460	-2.9%
11	Thailand	795,254	1,218,456	2,013,710	-7.1%
12	Canada	461,370	1,431,904	1,893,274	-5.4%
13	Russia	1,523,594	118,494	1,642,088	-2.8%
14	Turkey	982,642	447,874	1,430,516	-5.7%
15	Czech Rep.	1,427,563	Not available	1,427,563	-0.6%
16	**UK**	**1,303,135**	**57,442**	**1,360,577**	**-13.9%**

Note: Audi, BMW, JLR, Mercedes, Scania and Daimler Trucks data not reported

Source: OICA 2019

Top 10 European automotive manufacturers in 2018

Rank	Country	Cars	Commercial Vehicles	Total	% change
1	Germany	5,120,409	522,323	5,642,732	-8.26%
2	Spain	2,267,396	661,559	2,928,955	0.06%
3	France	1,763,300	574,610	2,337,910	2.70%
4	**UK**	**1,519,440**	**78,410**	**1,597,850**	**-8.41%**
5	Czech Republic	1,345,041	-	1,345,041	-5.28%
6	Slovakia	1,031,241	-	1,031,241	8.62%
7	Italy	670,932	357,384	1,028,316	-5.26%
8	Poland	451,600	202,042	653,642	-5.23%
9	Romania	476,769	-	476,769	30.75%
10	Hungary	430,988	-	430,988	0.99%

Up to date info from ACEA: www.acea.be/statistics/tag/category/eu-production)

UK AUTOMOTIVE MANUFACTURING

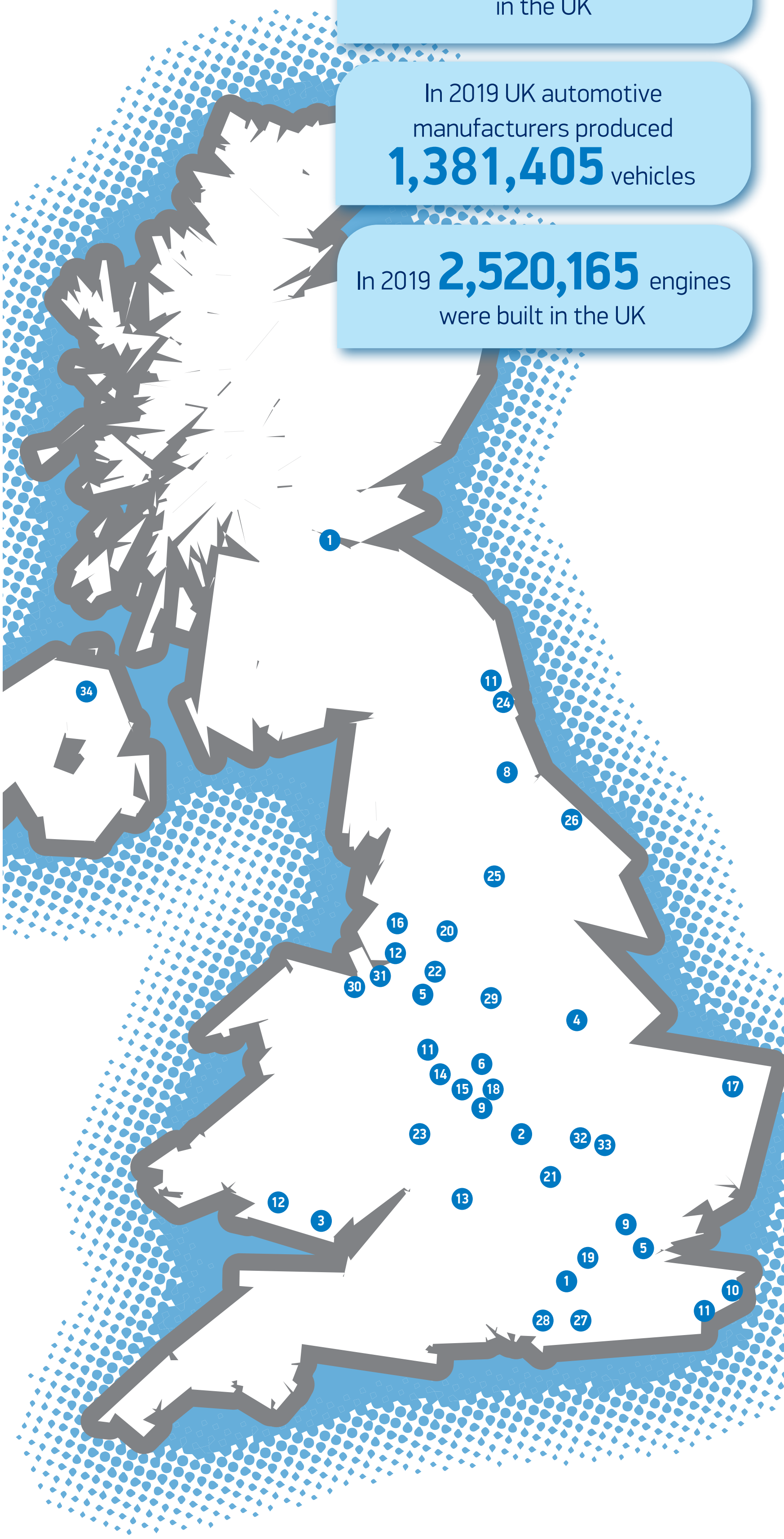
Key UK manufacturing sites

Key	Manufacturer	Location	Sector	Model
1	Alexander Dennis	Falkirk and Guildford	Bus and coach	Enviro bus range
2	Aston Martin	Gaydon	Car	DBS Superleggera, DB11, Rapide S, Vantage
3	Aston Martin	St Athans	Car	DBX
4	Autocraft	Grantham	Engine	Engine range
5	Bentley	Crewe	Car and engine	Bacalar, Bentayga, Continental GT, Flying Spur and Mulsanne
6	BMW	Hams Hall	Engine	Engine range
7	Caterham	Dartford	Car	Seven
8	Cummins	Darlington	Engine	Engine range
9	Dennis Eagle	Warwick	CV	Truck range
10	Euromotive	Dover	Bus and Coach	Minibus range
11	Euromotive	Hythe	Bus and Coach	Minibus range
12	Ford	Bridgend and Dagenham	Engine	Engine range
13	Honda	Swindon	Car and engine	Engine range Civic, Civic Type R
14	Jaguar Land Rover	Castle Bromwich and Wolverhampton	Car and engine	Engine range Jaguar: F-Pace, F-Type, XE, XF, XJ
15	Jaguar Land Rover	Solihull and Halewood	Car	Jaguar: F-Type Land Rover: Discovery Sport, Evoque, Range Rover, Range Rover Sport, Velar
16	Leyland Trucks	Leyland	CV	DAF CF, LF and XF truck range
17	Lotus	Norwich	Car	Elise, Evija, Evora and Exige
18	LEVC	Coventry	CV	TX Taxi
19	McLaren Automotive	Woking	Car	GT, 540, 570, 600, 620, 720 and Senna
20	Mellor	Rochdale	Bus and coach	Accessible coach range
21	MINI	Oxford	Car	MINI 3-Door Hatch, MINI 5-Door Hatch, MINI Clubman, MINI Electric
22	Minibus Options	Whaley Bridge	Bus and coach	Minibus range
23	Morgan	Malvern	Car	Plus 4, Plus 6, Roadster, 3 Wheeler
24	Nissan	Sunderland	Car and engine	Juke, LEAF and Qashqai
25	Optare	Leeds	Bus and coach	Metrocity, Solo, Tempo and Versa bus range
26	Plaxton	Scarborough	Bus and coach	Cheetah, Elite, Leopard, Panorama and Panther coach bodies and Enviro bus range
27	Ricardo	Shoreham-by-Sea	Engine	Engine range
28	Rolls-Royce	Goodwood	Car	Cullinan, Dawn, Ghost, Phantom and Wraith
29	Toyota	Burnaston	Car and engine	Corolla
30	Toyota	Deeside	Engine	Engine range
31	Vauxhall	Ellesmere Port	Car	Astra
32	Vauxhall	Luton	CV	Vivaro, Peugeot Expert and Citroen Dispatch vans
33	Warnerbus	Dunstable	Bus and coach	Minibus range
34	Wrightbus	Ballymena (NI)	Bus and coach	Bus range

There are more than **2,400** automotive component providers in the UK

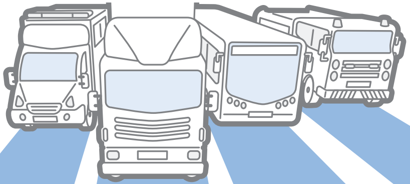
In 2019 UK automotive manufacturers produced **1,381,405** vehicles

In 2019 **2,520,165** engines were built in the UK



COMMERCIAL VEHICLE MANUFACTURING

UK Commercial Vehicle manufacturing volumes: 2016 to 2019



2016
93,924

2017
78,219

2018
84,888

2019
78,270

UK Commercial Vehicle manufacturing – 2018 vs 2019

	2018	2019	% Change
Total	84,888	78,270	-7.8%
Home	34,568	32,160	-7.0%
Export	50,320	46,110	-8.4%
% export	59.3%	58.9%	

Proportion of British-built CVs exported to global markets
58.9%
in 2019

94.6%
of CVs produced for export were sent to the EU

UK ENGINE PRODUCTION

Maintaining
RECORD LEVELS
of production

Total units
2,520,165

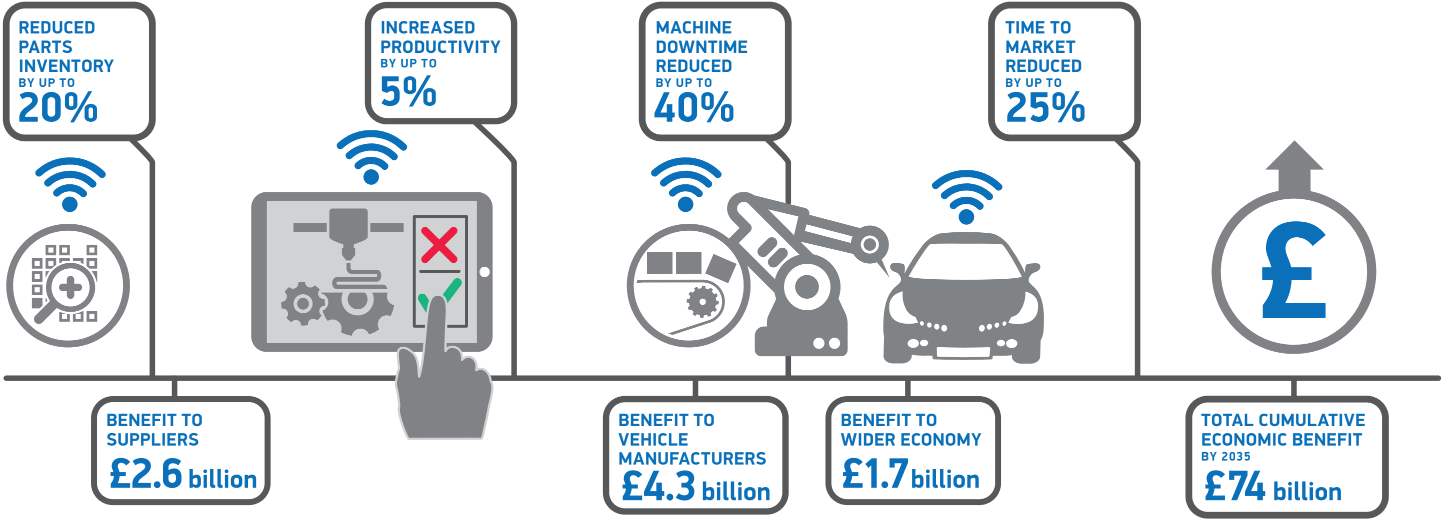
8,000
jobs in UK light vehicle engine production

3,500
jobs reliant on UK diesel engine production

8.5 billion
turnover value in light vehicle engine production

DIGITALISATION OF AUTOMOTIVE MANUFACTURING

The digital revolution of the automotive industry is already underway. Vehicle manufacturers and suppliers are benefitting from increased productivity, greater flexibility and shorter times to market.



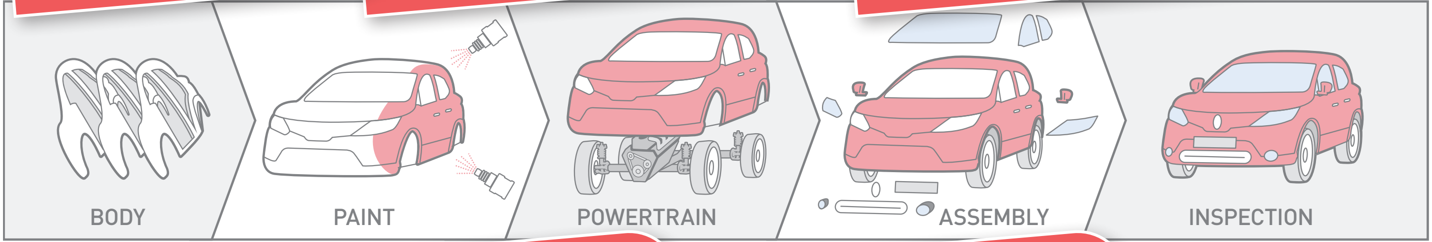
Source: SMMT and KPMG report The Digitalisation of the UK Automotive Industry (2016)

UK AUTOMOTIVE SUPPLY CHAIN

86,000 people employed in the UK supply chain

44% average UK content in British-built cars (up from 36% in 2011)

£4.5bn added value generated by suppliers each year



2,400+ automotive suppliers in the UK

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

UK AUTOMOTIVE AND THE EU

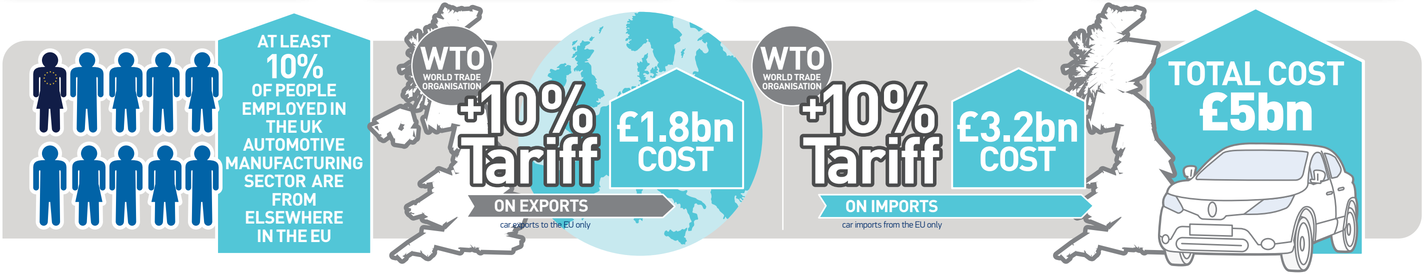
The European automotive industry is deeply integrated with:

69.2% of cars registered in 2019 imported from the EU

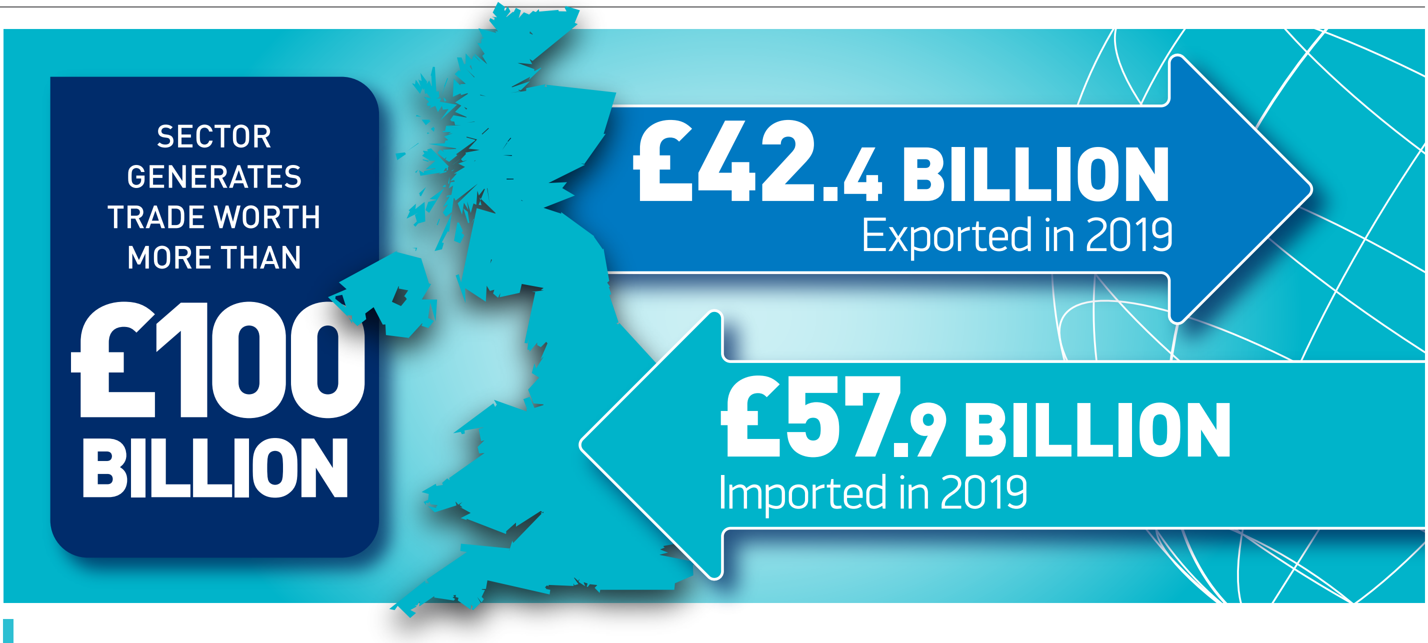
54.8% of 2019 UK assembled car exports heading to EU

80% of imported components coming from the EU

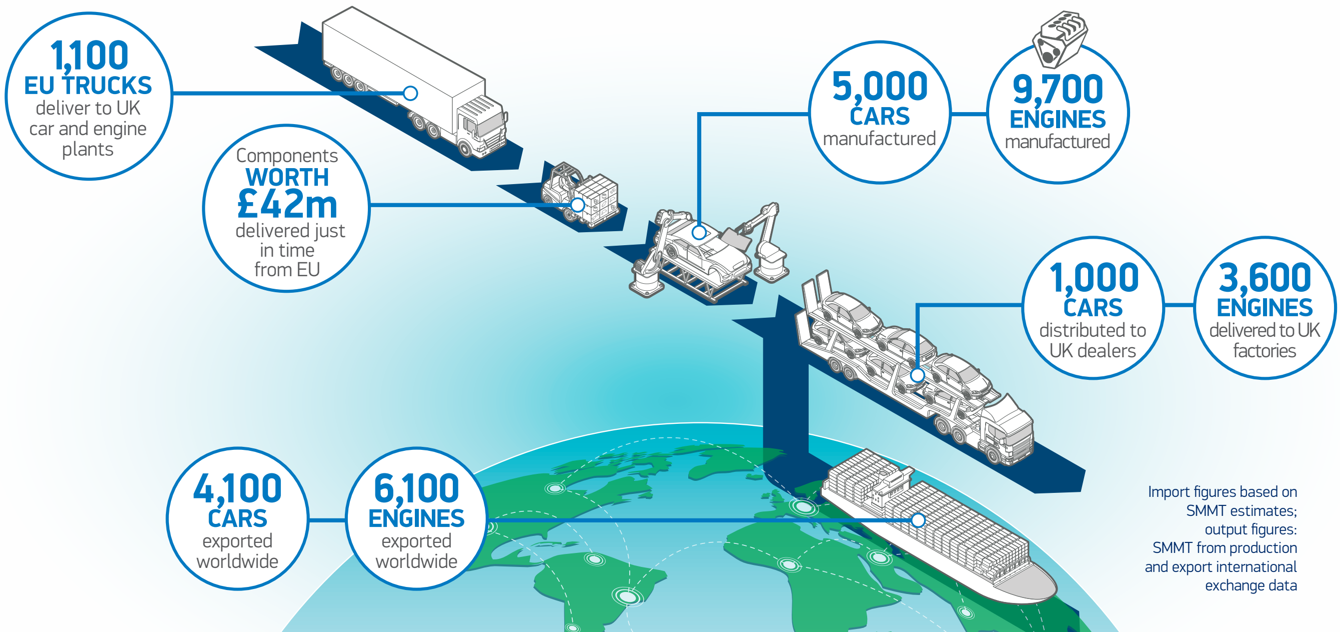
69% of British-built components exported to the EU



UK AUTOMOTIVE: £100 BILLION TRADE HUB



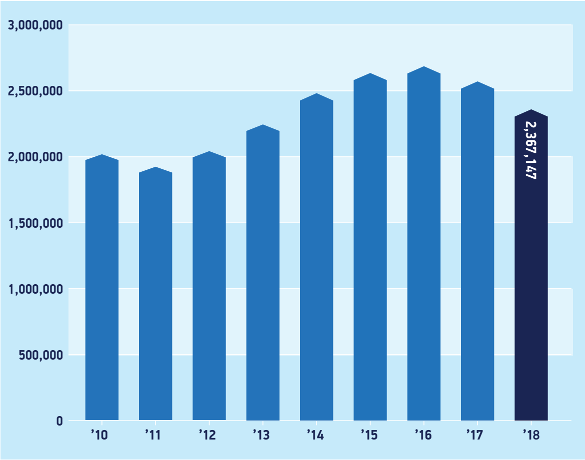
A DAY IN UK AUTOMOTIVE



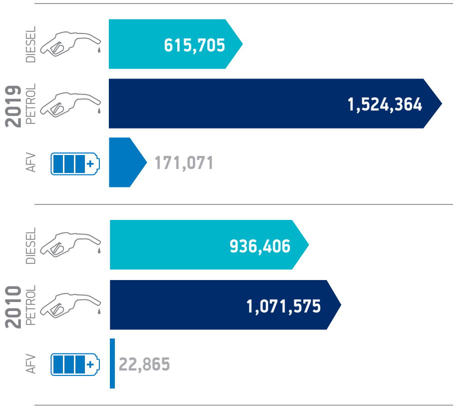
Import figures based on SMMT estimates; output figures: SMMT from production and export international exchange data

NEW CAR REGISTRATIONS

Annual New Car Registrations – 2010 to 2019



New car registrations by fuel type – 2019 vs 2010

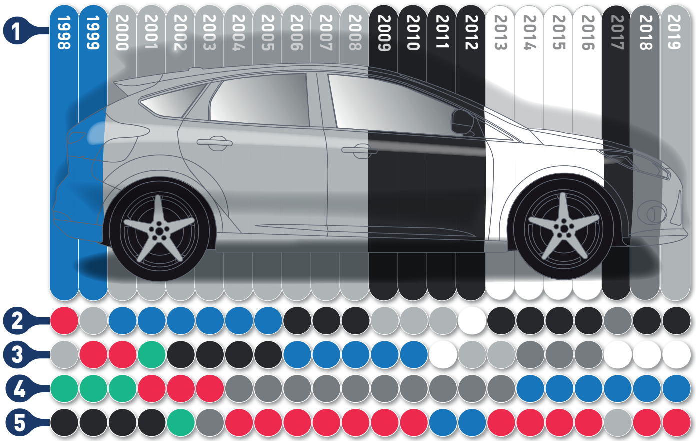


Top 10 UK sellers in 2019

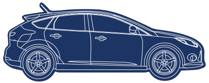
	Model	Volume
1	**Ford** Fiesta	77,833
2	**Volkswagen** Golf	58,994
3	**Ford Focus**	56,619
4	**Vauxhall** Corsa	54,239
5	**Mercedes** A-Class	53,724
6	**Nissan** Qashqai	52,532
7	**Ford** Kuga	41,671
8	**Mini**	41,188
9	**Volkswagen** Polo	37,453
10	**Kia** Sportage	34,502

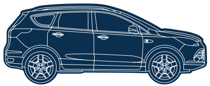
CHANGING CONSUMER TASTES

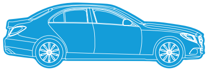
Changing tastes in car colour: Top 5 1998-2019

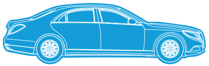


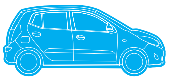
Shift in market segment – 2019 vs 2010

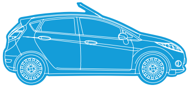

LOWER MEDIUM **+16.66%**
2010 **542,966** / 2019 **633,430**

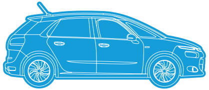

DUAL PURPOSE **+259.22%**
2010 **156,552** / 2019 **562,360**

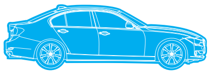

EXECUTIVE **-4.45%**
2010 **99,079** / 2019 **94,667**

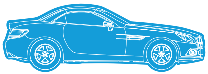

LUXURY SALOON **-12.10%**
2010 **8,140** / 2019 **7,155**


MINI **-20.88%**
2010 **53,388** / 2019 **42,243**


SUPER MINI **-6.80%**
2010 **736,052** / 2019 **685,989**

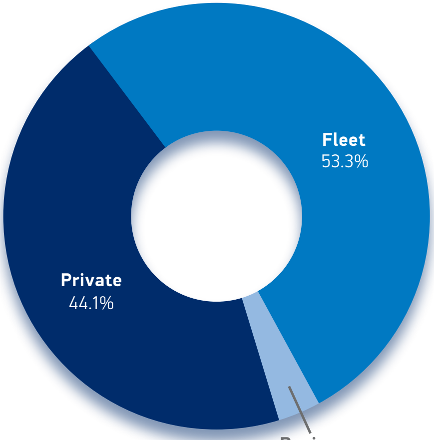

MULTI PURPOSE **-41.19%**
2010 **124,208** / 2019 **73,051**


UPPER MEDIUM **-36.38%**
2010 **264,251** / 2019 **168,123**


SPECIALIST SPORTS **-4.52%**
2010 **46,210** / 2019 **44,122**

REGISTRATIONS BY SALES TYPE

2019 registrations by sales type



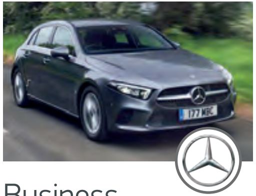
Top five new car registrations in 2019 by sales type

Private

Model	Volume
Ford Fiesta	53,609
Vauxhall Corsa	32,117
MINI	24,962
Ford Focus	23,821
Volkswagen Polo	22,638

Fleet

Model	Volume
Volkswagen Golf	37,374
Nissan Qashqai	34,957
Ford Focus	32,794
Mercedes-Benz A-Class	31,172
Ford Kuga	27,555



Business

Model	Volume
Mercedes-Benz A-Class	2,609
Honda Jazz	2,418
Volkswagen Golf	2,408
Mitsubishi Outlander	2,132
Fiat 500	1,918

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 SEGMENT

Top cars registered by segment

Model	Volume	Segment share
Hyundai i10	19,146	45.3%
Volkswagen up!	8,465	20.0%
SKODA Citigo	4,728	11.2%
Vauxhall Viva	4,182	9.9%
Suzuki Celerio	2,212	5.2%

Segment total: 42,243

Model	Volume	Segment share
Ford Fiesta	77,833	11.3%
Vauxhall Corsa	54,239	7.9%
MINI	41,188	6.0%
Volkswagen Polo	37,453	5.5%
Toyota Yaris	28,792	4.2%

Segment total: 685,989

Model	Volume	Segment share
Volkswagen Golf	58,994	9.3%
Ford Focus	56,619	8.9%
Mercedes-Benz A-Class	53,724	8.5%
Nissan Qashqai	52,532	8.3%
BMW 1 Series	28,688	4.5%

Segment total: 633,430

REGISTRATIONS BY SEGMENT

Top cars registered by segment

Model	Volume	Segment share
BMW 3 Series	27,343	16.3%
Skoda Octavia	20,703	12.3%
Audi A4	14,539	8.6%
BMW 4 Series	13,083	7.8%
Audi A5	10,627	6.3%

Segment total: 168,123

Model	Volume	Segment share
Mercedes-Benz C-Class	27,420	29.0%
Mercedes-Benz E-Class	22,286	23.5%
BMW 5 Series	18,749	19.8%
Audi A6	10,821	11.4%
Volvo V90	4,540	4.8%

Segment total: 94,667

Model	Volume	Segment share
Mercedes-Benz S-Class	2,241	31.3%
BMW 7 Series	1,775	24.8%
Bentley Continental	1,002	14.0%
Audi A8	823	11.5%
Mercedes-Benz SL	442	6.2%

Segment total: 7,155

REGISTRATIONS BY SEGMENT

Top cars registered by segment

Model	Volume	Segment share
Audi TT	4,710	10.7%
Mazda MX-5	4,132	9.4%
Porsche 911	2,913	6.6%
Porsche 718	2,392	5.4%
BMW Z Series	2,039	4.6%

Segment total: 44,122

Model	Volume	Segment share
Ford Kuga	41,671	7.4%
Kia Sportage	34,502	6.1%
Volkswagen Tiguan	33,273	5.9%
Hyundai Tucson	28,446	5.1%
Land Rover Range Rover Evoque	23,304	4.1%

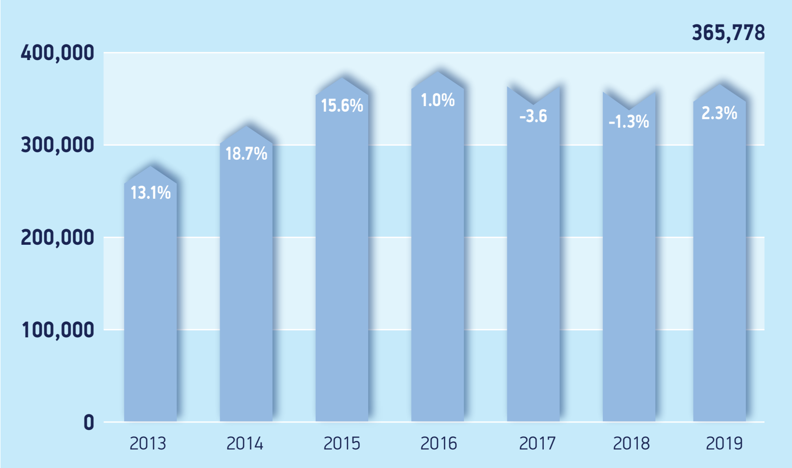
Segment total: 562,360

Model	Volume	Segment share
Citroen Spacetourer	5,166	7.1%
Volkswagen Sharan	4,851	6.6%
Ford Tourneo Custom	4,514	6.2%
Mercedes Benz B-Class	4,359	6.0%
Toyota Prius Plus	3,770	5.2%

Segment total: 73,051

COMMERCIAL VEHICLE REGISTRATIONS

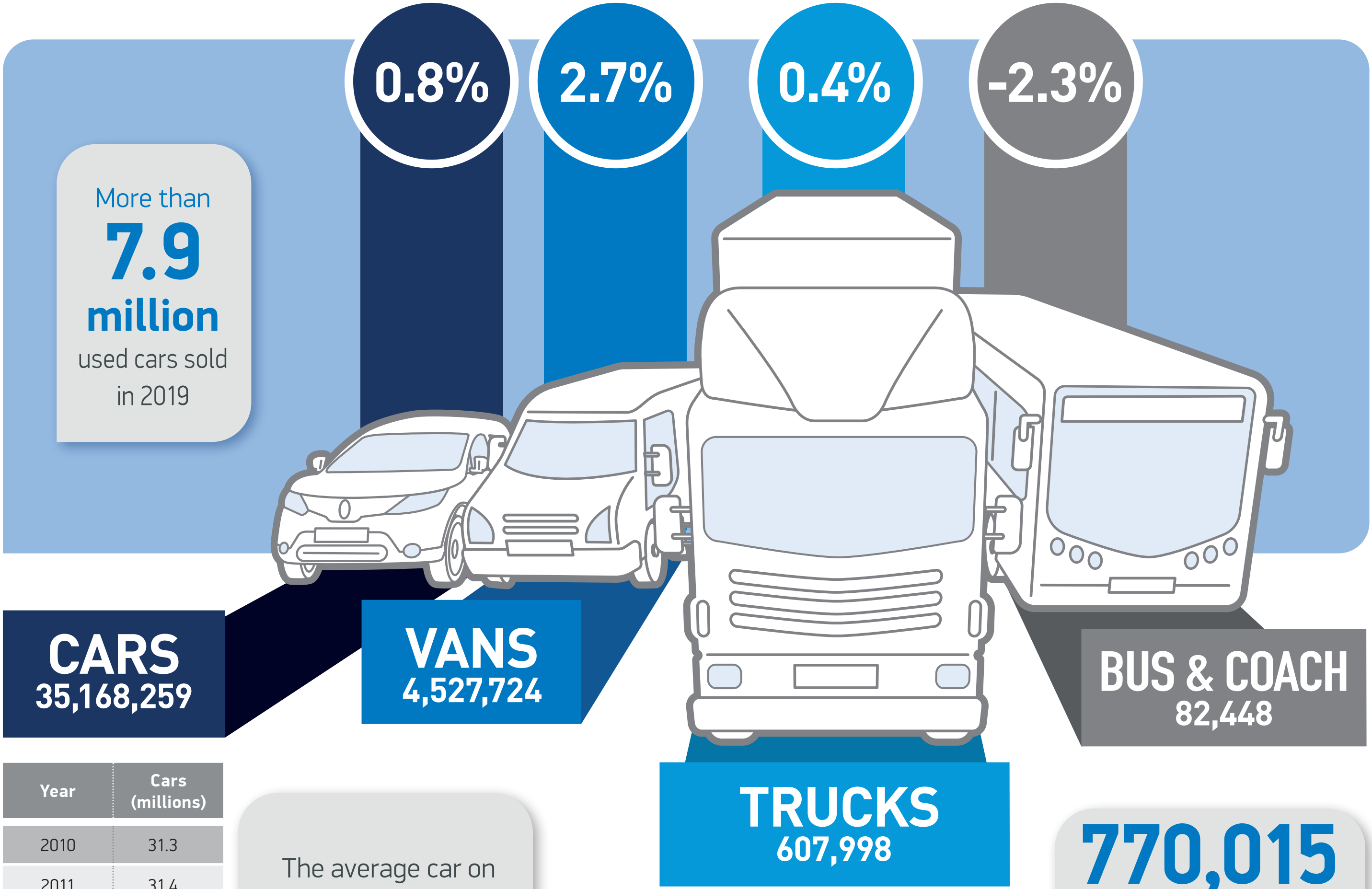
Van registrations – 2013 to 2019



2019 HGV, bus and coach registrations

	Rigids	Artics	Bus and coach
2019	26,344	22,191	5,874
Change on 2018	10.6%	15.1%	-18.8%

VEHICLES ON THE ROAD



Year	Cars (millions)
2010	31.3
2011	31.4
2012	31.5
2013	31.9
2014	32.6
2015	33.5
2016	34.4
2017	34.7
2018	34.9
2019	35.1

The average car on the road in the UK is **black** from the **Supermini** segment and **8 years old**

144,335 plug-in cars (PHEV)

92,913 BEVs

40,386,439 vehicles on UK roads

770,015 alternatively fuelled cars

58,799 alternatively fuelled commercial vehicles (vans, trucks, buses and coaches)

ARE ON THE ROAD

VEHICLES ON THE ROAD

The LCV's contribution to the UK economy

3.4m

people use or depend on vans for their work

Vans support **10%** of the UK's workforce, delivering a combined wage bill of **£56 billion,** or **11%** of UK GDP

VEHICLES ON THE ROAD

The LCV's role in industry

60%

of LCV parc is driven by:

construction; wholesale, retail and repair of motor vehicles; manufacturing; and transport and storage

Construction is the biggest single user of LCVs

LCV sector growth

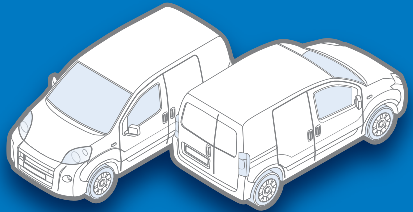
59%

growth in the LCV sector since 2000

The second (and third) life of the LCV

900,000

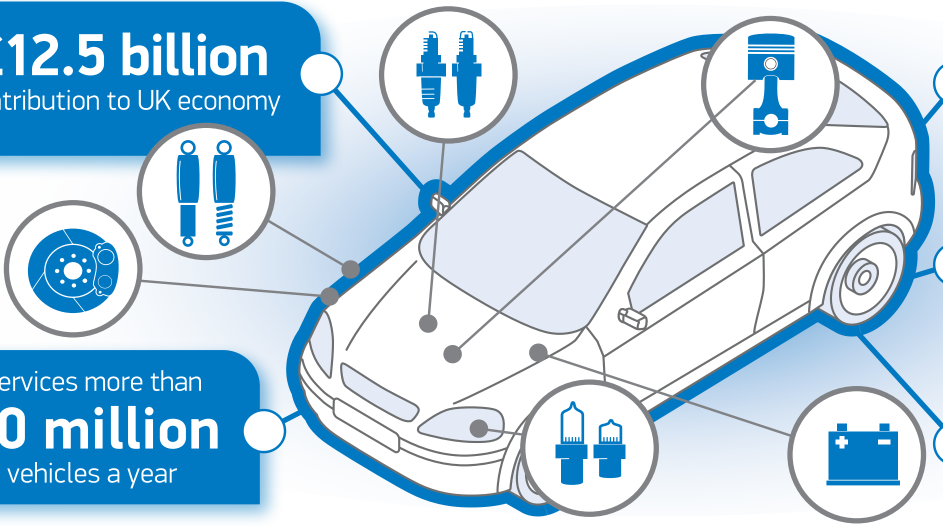
used vans change hands each year



THE IMPORTANCE OF THE AFTERMARKET TO THE UK ECONOMY

£12.5 billion
contribution to UK economy

£21.6 billion
revenue of UK aftermarket



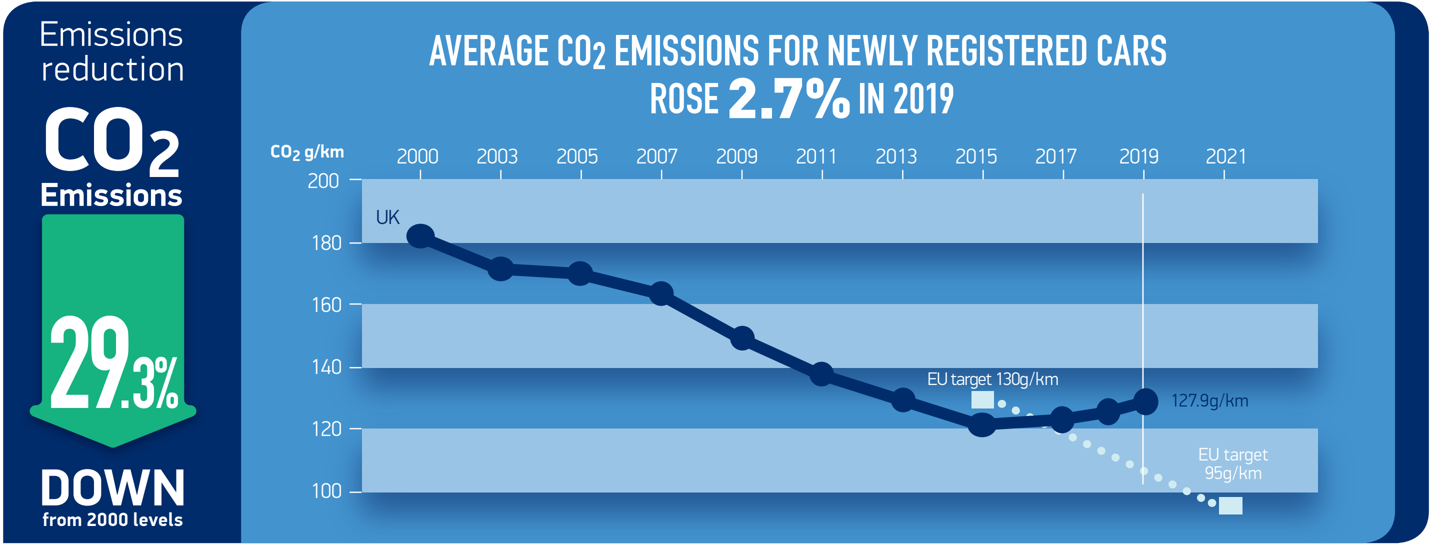
Services more than
30 million
vehicles a year

347,000
jobs supported

£706.71
average annual spend per car

Source: SMMT and Frost & Sullivan Reports: The Importance of the UK Aftermarket to the UK Economy (2017)

ENVIRONMENT – CO_2

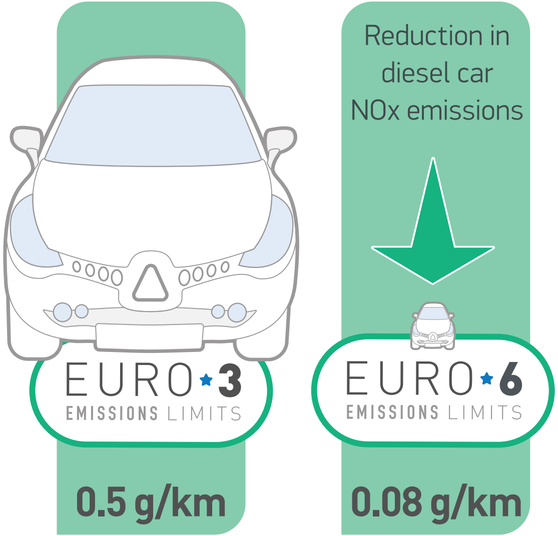


Source: SMMT 2019

ENVIRONMENT – AIR QUALITY

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

Source: Transport for London



New WLTP test

Introduced in 2017 for new models and 2018 for new registrations, the WLTP (Worldwide Harmonised Light Vehicle Test Procedure) was introduced to replace the old NEDC lab test.

A lab test to measure fuel consumption, CO_2 and pollutant emissions from cars:

- **Test cycle data based on real-driving data**
- **Variety of driving phases tested**
- **Powertrain configuration of each car tested for the car's lightest and heaviest version**

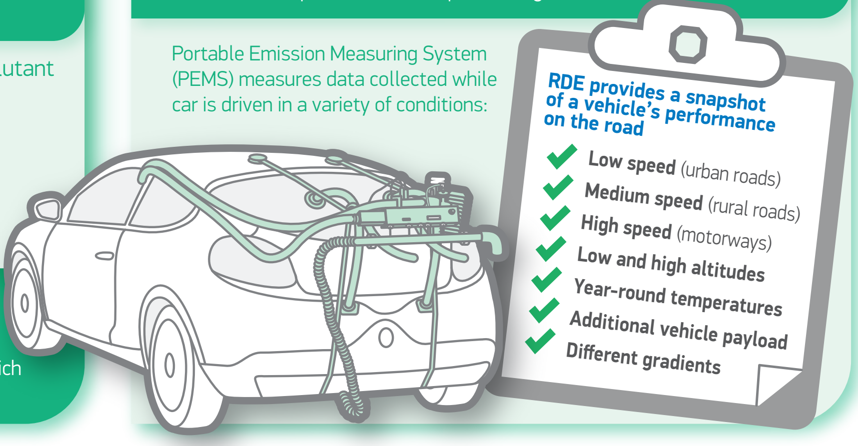
Why do we still need a lab test?

The new WLTP test is much more representative and lab tests allow for a standardised, repeatable testing model which enables comparisons of one car's emissions with the next.

RDE

The Real Driving Emissions (RDE) test measures pollutants while a car is driven on public roads, complementing the WLTP lab test.

Portable Emission Measuring System (PEMS) measures data collected while car is driven in a variety of conditions:



CONNECTED AND AUTONOMOUS VEHICLES

Potential overall impact of CAVs on the UK economy by 2030

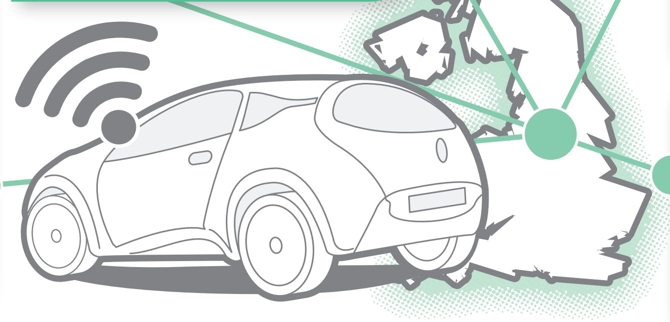
+£62 billion
economic growth

55%
of new Automotive jobs to be high skilled

+420,000
New jobs

3,900
lives saved

47,000
serious accidents prevented
(2019-30)



+20,000
new jobs in Automotive

Source: SMMT and Frost & Sullivan report, 2019: Connected and Autonomous Vehicles: The Global Race to Market

CONNECTED AND AUTONOMOUS VEHICLES

8 IN 10
new cars available with driver assistance systems

Distance Indication helps drivers keep a safe following distance from the vehicle ahead.

70.7%
of new cars are available with Autonomous Emergency Braking technology

Autonomous Emergency Braking reacts quickly to apply the brakes in the event of a collision.

55.5%
of new cars are available with Adaptive Cruise Control

Adaptive Cruise Control automatically adjusts speed to maintain a safe distance from vehicles ahead.

83.6%
of new cars offered with a self-activating safety system

Auto High Beam detects headlights and tail lights of other vehicles and automatically switches to high or low beams.

1.9 million
buyers a year able to benefit from collision avoidance technology

Forward Collision Warning warns drivers of an imminent frontal collision.

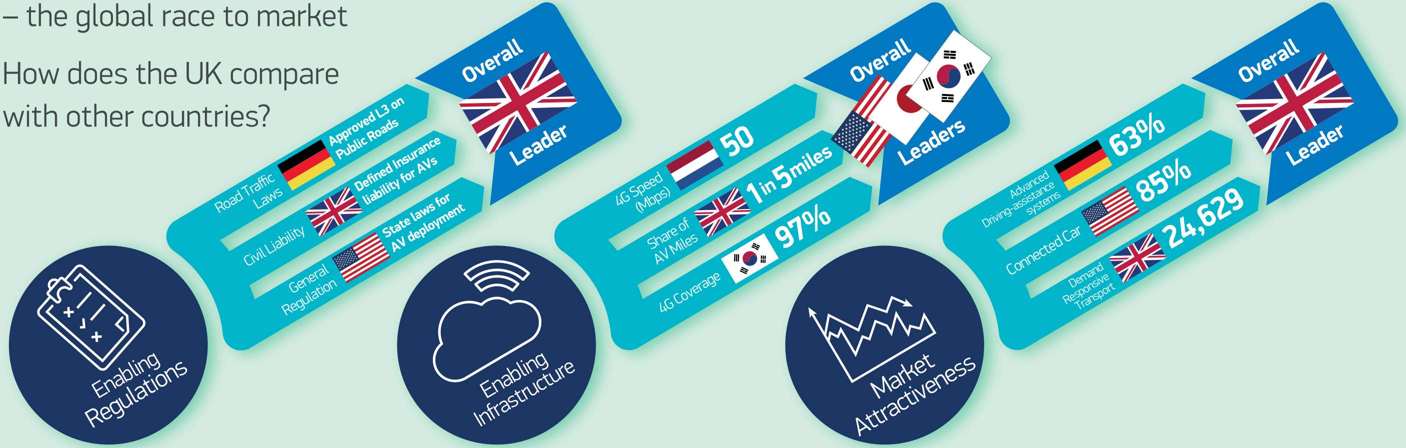
54.2%
of new cars are available with Overtaking Sensors

Blind Spot Information System helps detect vehicles in driver's blind spot when changing lane.

Source: Latest autonomous technology vehicle content analysis conducted by JATO Dynamics

Deployment of connected and autonomous vehicles – the global race to market

How does the UK compare with other countries?



Source: SMMT and Frost & Sullivan report, 2019: Connected and Autonomous Vehicles: The Global Race to Market

SMMT Industry Forum

Industry Forum, a training and consultancy, initially formed in 1994 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

The Motor Ombudsman

The Motor Ombudsman is the automotive dispute resolution body. Fully-impartial, it is the first Ombudsman to be focused solely on the automotive sector. It self-regulates the UK's motor industry, drives up standards and gives consumers added protection through its comprehensive Chartered Trading Standards Institute (CTSI)-approved Motor Industry Codes of Practice. .

www.themotorombudsman.org

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