SMMT
DRIVING THE
MOTOR INDUSTRY

SMMT MOTOR INDUSTRY FACTS 2021

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.

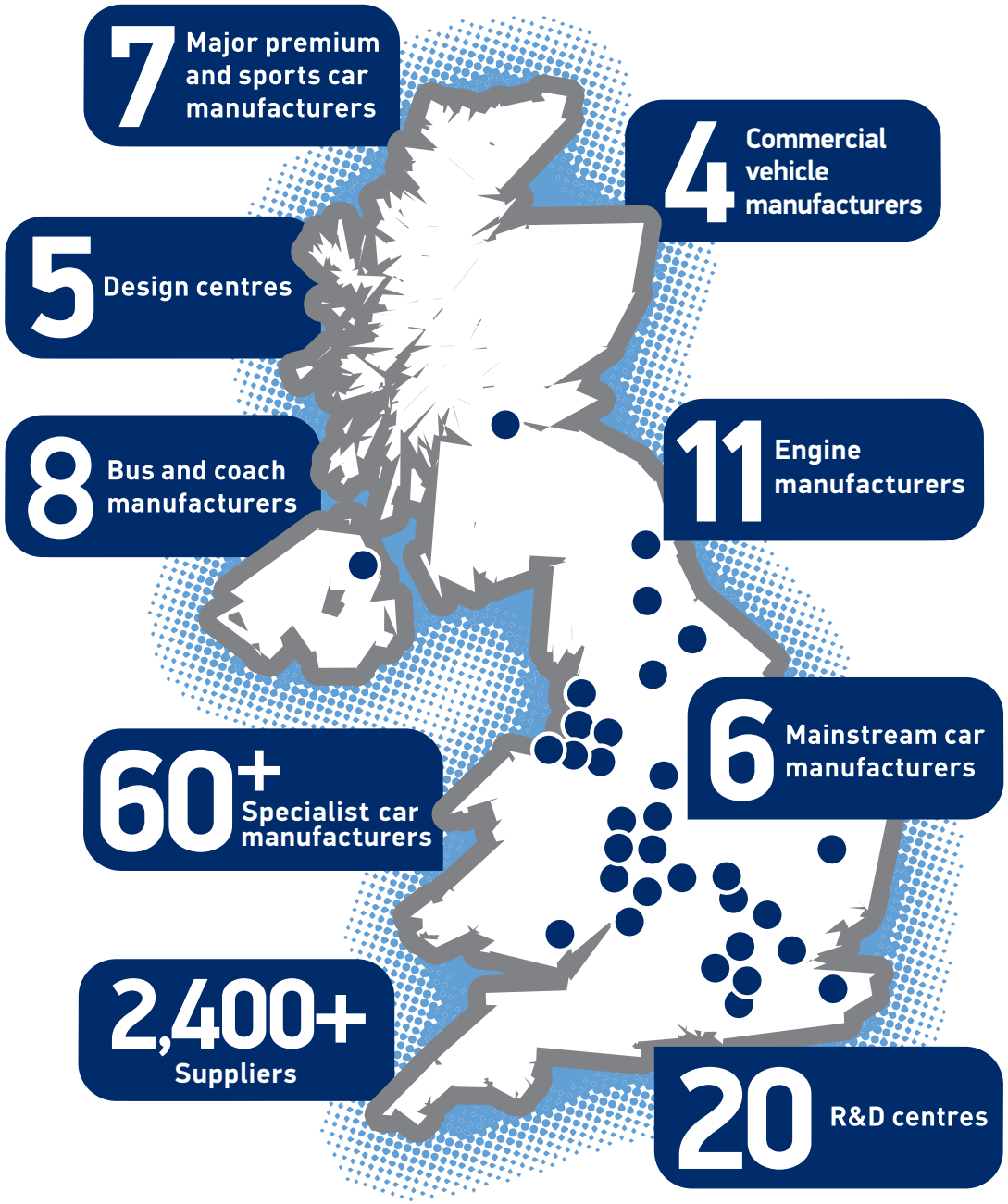
SMMT represents more than 800 automotive companies in the UK, providing them with a forum to voice their views on issues affecting the automotive sector, helping to guide strategies and build positive relationships with government and regulatory authorities

To find out how to join SMMT and for more information, visit **www.smmt.co.uk/memberservices** or email **membership@smmt.co.uk**

CONTENTS

UK AUTOMOTIVE AT A GLANCE	**4-5**
UK AUTOMOTIVE INDUSTRY	**6**
UK automotive employment	6
UK automotive: background	7
MANUFACTURING	**8**
UK automotive manufacturing	8
UK automotive production by fuel type	9
UK car manufacturing	10
UK car exports	11
Global automotive manufacturing	12
Map: UK automotive manufacturing sites	13-15
Commercial vehicle manufacturing	16
Engine manufacturing	17
UK AUTOMOTIVE SUPPLY CHAIN	**18**
UK AUTOMOTIVE AFTERMARKET	**19**
UK AUTOMOTIVE: £100 BILLION TRADE HUB	**20**
REGISTRATIONS	**21-28**
New car registrations	21
Registrations of AFVs	22
Registrations by colour	23
Registrations by sales type	24
Registrations by segment	25-27
Commercial vehicle registrations	28
VEHICLES ON THE ROAD	**29-33**
ENVIRONMENT AND AIR QUALITY	**34-36**
Environment – CO_2	34
Environment – Air Quality	35
Environment – WLTP and RDE	36
CONNECTED CARS	**37-39**
SMMT GROUP	**40**

UK AUTOMOTIVE AT A GLANCE



£60.2 billion
UK automotive turnover in 2020

1,631,064
New cars registered in 2020

150+
Countries importing UK-built vehicles

749,038
Cars exported in 2020

797,300
People employed across UK Auto

35.08 million
Cars currently on UK roads

920,928
Cars built in 2020

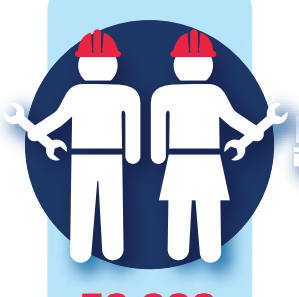
66,116
Commercial vehicles built in 2020

1,840,847
Engines built in the UK 2020

UK AUTOMOTIVE EMPLOYMENT

797,300
people employed across UK Automotive

156,400
people directly employed in manufacturing



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

40,000
new jobs forecast to be created in automotive sector by 2030
(Public First)

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

UK AUTOMOTIVE: BACKGROUND

In 2020 the UK automotive manufacturing industry...

Turned over **£60.2 billion**

Invested **£2.4 billion** net capital

Invested **£2.9 billion** in R&D

Added **£11.9 billion** in value to the UK economy

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

*2019 data from 2020 Trade report

Source: 2021UK Automotive Sustainability Report

UK AUTOMOTIVE MANUFACTURING

Top fives in production – 2020

Cars by brand

Make	Volume
Nissan	245,649
Jaguar Land Rover	243,908
MINI	175,736
Toyota	116,261
Honda	69,366

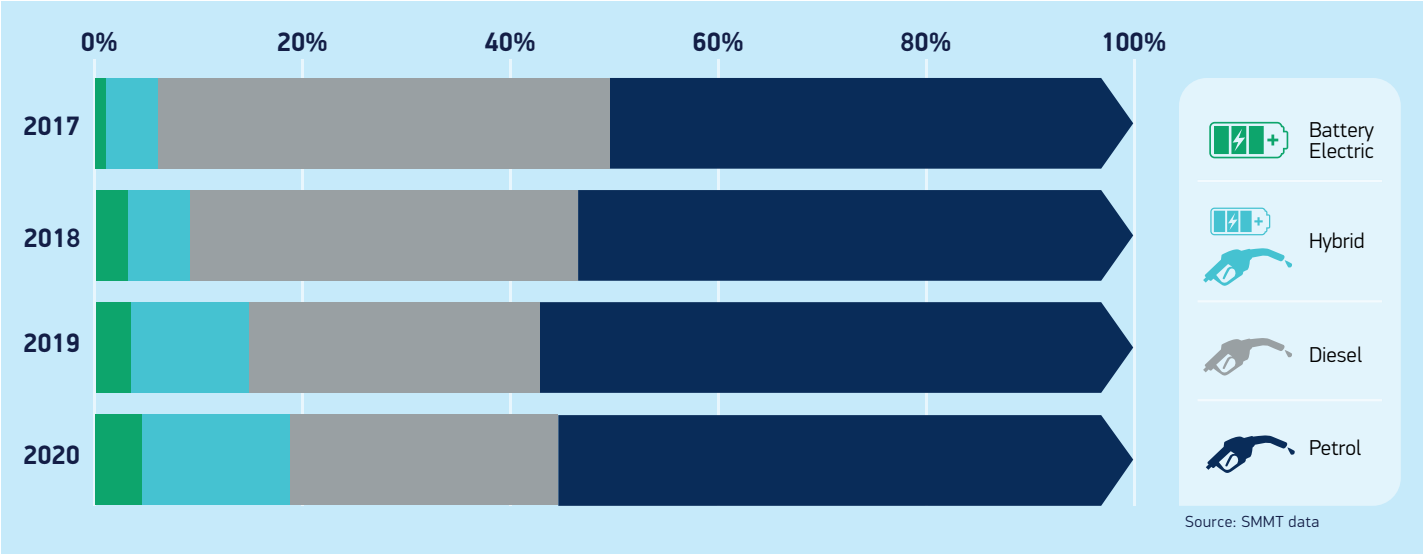
Cars by model

Model	Volume (production)
Nissan Qashqai	149,426
MINI	144,797
Toyota Corolla	116,261
Honda Civic	72,745
Land Rover Range Rover Sport	69,366

Commercial vehicles by brand

Make	Volume
Stellantis	49,700
Leyland Trucks	12,914
LEVC	1,544
Dennis Eagle	1,017
Alexander Dennis	874

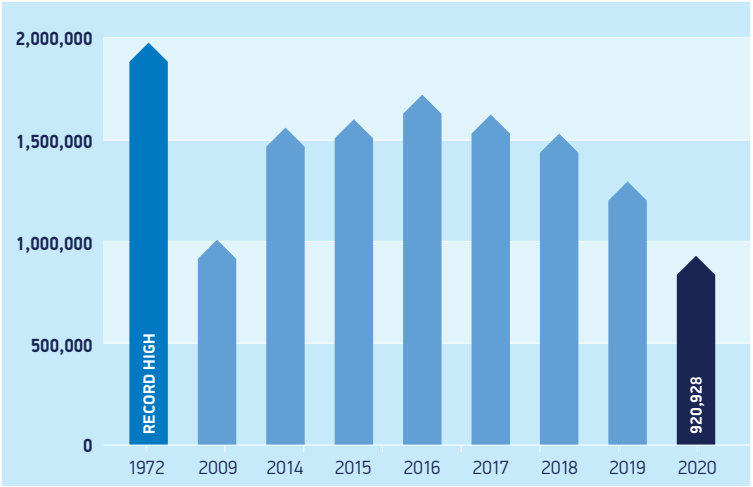
UK AUTOMOTIVE PRODUCTION BY FUEL TYPE, 2017-2020



Source: SMMT data

UK CAR MANUFACTURING

UK car manufacturing



920,928

cars built in the UK in 2020

UK car manufacturing – 2019 vs 2020

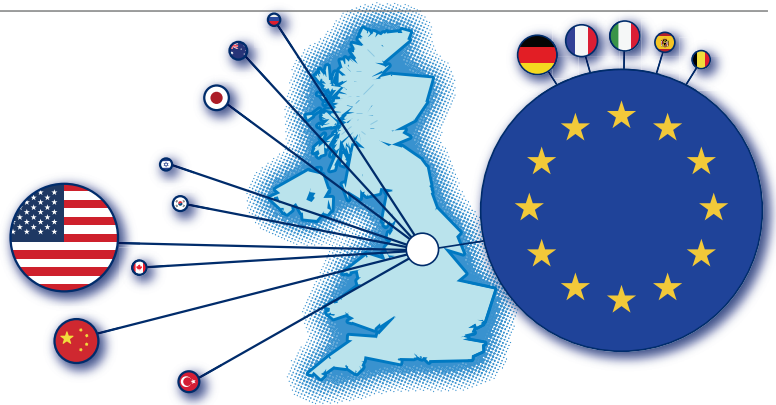
	2019	2020	% Change
Total	1,303,135	920,928	-29.3%
Home	247,138	171,890	-30.4%
Export	1,055,997	749,038	-29.1%
% Export	81.0%	81.2%	

UK CAR EXPORTS

749,038
cars manufactured for export in 2020

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	400,460	53.5%
U.S.A.	132,252	17.7%
China	57,002	7.6%
Japan	26,325	3.5%
Turkey	19,800	2.6%

Australia	15,741	2.1%
South Korea	12,804	1.7%
Canada	11,490	1.5%
Russia	8,168	1.1%
Israel	7,708	1.0%

EU27
Germany
France
Italy
Spain
Belgium

GLOBAL AUTOMOTIVE MANUFACTURING

Top 16 global automotive manufacturers in 2020

Rank	Country	Cars	Commercial vehicles	Total	% change
1	China	19,994,081	5,231,161	25,225,242	-2%
2	USA	1,926,795	6,895,604	8,822,399	-19%
3	Japan	6,960,025	1,107,532	8,067,557	-17%
4	Germany	3,515,372	227,082	3,742,454	-24%
5	South Korea	3,211,706	295,068	3506,774	-11%
6	India	2,851,268	543,178	3,394,446	-25%
7	Mexico	967,479	2,209,121	3,176,600	-21%
8	Spain	1,800,664	467,521	2,268,185	-20%
9	Brazil	1,608,870	405,185	2,014,055	-32%
10	Russia	1,260,517	174,818	1,435,335	-17%
11	Thailand	537,633	889,441	1,427,074	-29%
12	Canada	327,681	1,048,942	1,376,623	-28%
13	France	927,718	388,653	1,316,371	-39%
14	Turkey	855,043	442,835	1,297,878	-11%
15	Czech Republic	1,152,901	6,250	1,159151	-19%
16	**UK**	**920,928**	**66,116**	**987,044**	**-29%**

Top 10 European automotive manufacturers in 2020

Rank	Country	Cars	Commercial Vehicles	Total	% change
1	Germany	3,515,372	227,082	3,742,454	-24%
2	Spain	1,800,664	467,521	2,268,185	-20%
3	France	927,718	388,653	1,316,371	-39%
4	Czech Republic	1,152,901	6,250	1,159,151	-19%
5	**UK**	**920,928**	**66,116**	**987,044**	**-29%**
6	Slovakia	985,000	0	985,000	-11.0%
7	Italy	451,826	325,339	777,165	-15.0%
8	Poland	278,900	172,482	451,382	-31.0%
9	Romaina	438,107	0	438,107	-11.0%
10	Hungary	406,497	0	406,497	-18.0%

Up to date info from OICA www.oica.net/category/production-statistics/2020-statistics/

UK AUTOMOTIVE MANUFACTURING

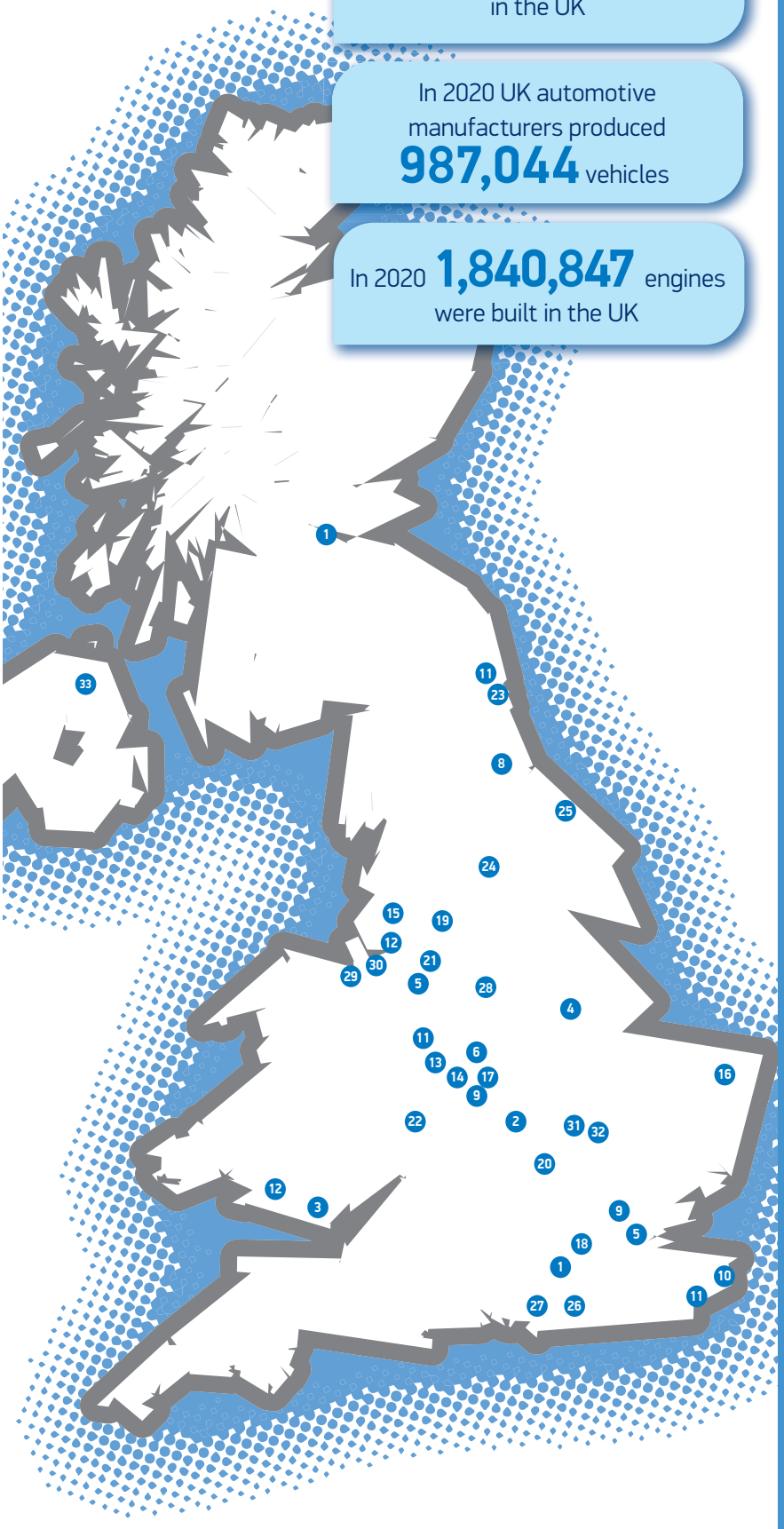
Key UK manufacturing sites

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	Jaguar Land Rover	Castle Bromwich and Wolverhampton	Car and engine	Engine range Jaguar: F-Pace, F-Type, XE, XF, XJ
14	Jaguar Land Rover	Solihull and Halewood	Car	Jaguar: F-Type Land Rover: Discovery Sport, Evoque, Range Rover, Range Rover Sport, Velar
15	Leyland Trucks	Leyland	CV	DAF CF, LF and XF truck range
16	Lotus	Norwich	Car	Elise, Evija, Evora and Exige
17	LEVC	Coventry	CV	TX Taxi
18	McLaren Automotive	Woking	Car	GT, 540, 570, 600, 620, 720 and Senna
19	Mellor	Rochdale	Bus and coach	Accessible coach range
20	MINI	Oxford	Car	MINI 3-Door Hatch, MINI 5-Door Hatch, MINI Clubman, MINI Electric
21	Minibus Options	Whaley Bridge	Bus and coach	Minibus range
22	Morgan	Malvern	Car	Plus 4, Plus 6, Roadster, 3 Wheeler
23	Nissan	Sunderland	Car and engine	Juke, LEAF and Qashqai
24	Optare	Leeds	Bus and coach	Metrocity, Solo, Tempo and Versa bus range
25	Plaxton	Scarborough	Bus and coach	Cheetah, Elite, Leopard, Panorama and Panther coach bodies and Enviro bus range
26	Ricardo	Shoreham-by-Sea	Engine	Engine range
27	Rolls-Royce	Goodwood	Car	Cullinan, Dawn, Ghost, Phantom and Wraith
28	Toyota	Burnaston	Car and engine	Corolla
29	Toyota	Deeside	Engine	Engine range
30	Vauxhall	Ellesmere Port	Car	Astra
31	Vauxhall	Luton	CV	Vivaro, Peugeot Expert and Citroen Dispatch vans
32	Warnerbus	Dunstable	Bus and coach	Minibus range
33	Wrightbus	Ballymena (NI)	Bus and coach	Bus range

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

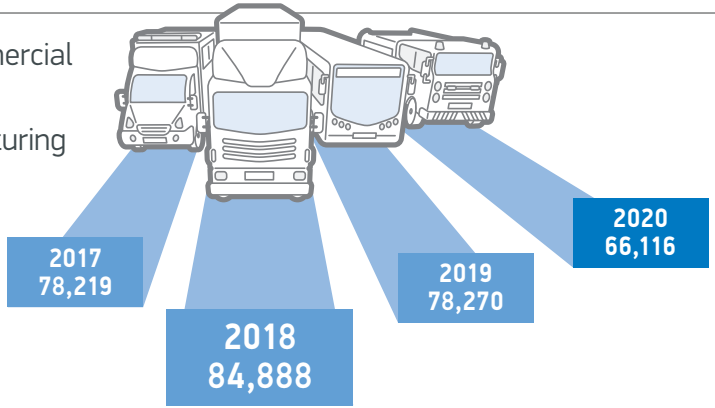
In 2020 UK automotive manufacturers produced **987,044** vehicles

In 2020 **1,840,847** engines were built in the UK



COMMERCIAL VEHICLE MANUFACTURING

UK Commercial Vehicle manufacturing volumes: 2017 to 2020



UK Commercial Vehicle manufacturing – 2019 vs 2020

	2019	2020	% Change
Total	78,270	66,116	-7.8%
Home	32,160	28,223	-7.0%
Export	46,110	37,893	-8.4%
% export	58.9%	57.3%	

Proportion of British-built CVs exported to global markets

57.3%

in 2020

94.9%

of CVs produced for export were sent to the EU

UK ENGINE PRODUCTION

UK engine manufacturing **DOWN -27.0%** in 2020

Total units

1,840,847

8,000
jobs in UK light vehicle engine production

3,500
jobs reliant on UK diesel engine production

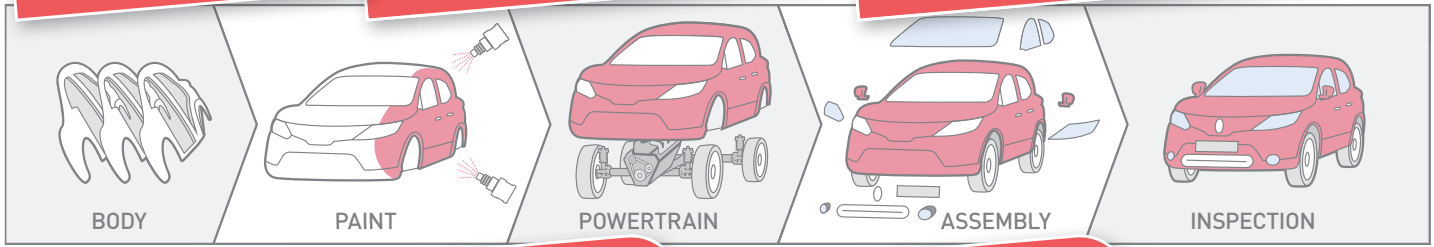
£8.5 billion
turnover value in light vehicle engine production

UK AUTOMOTIVE SUPPLY CHAIN

79,000 people employed in the UK supply chain

£15.5bn revenue of UK suppliers

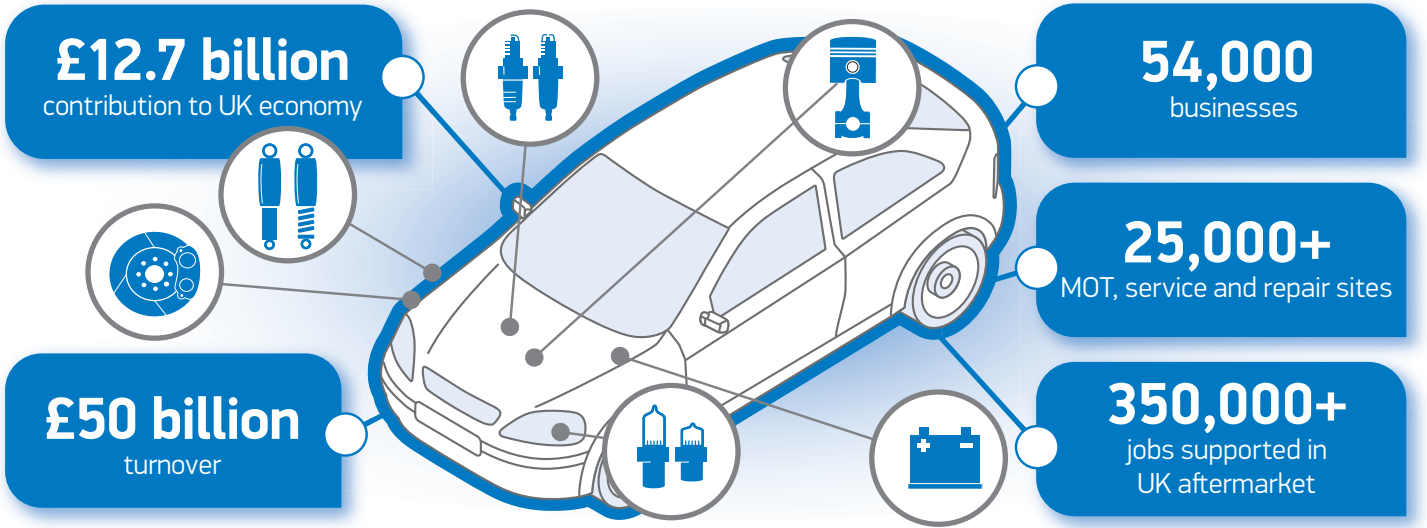
£4.2bn added value generated by suppliers each year



2,500+ automotive suppliers in the UK

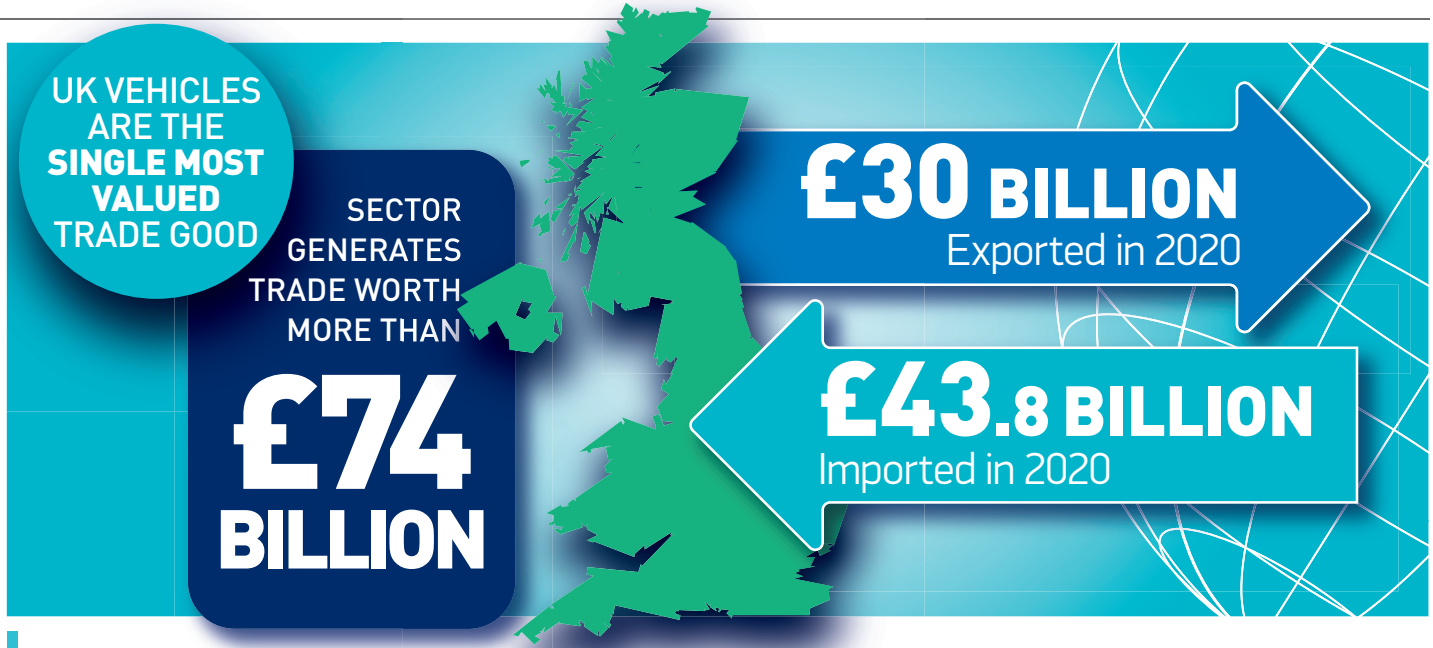
17 of the world's biggest automotive suppliers have a UK base

THE IMPORTANCE OF THE AFTERMARKET TO THE UK ECONOMY



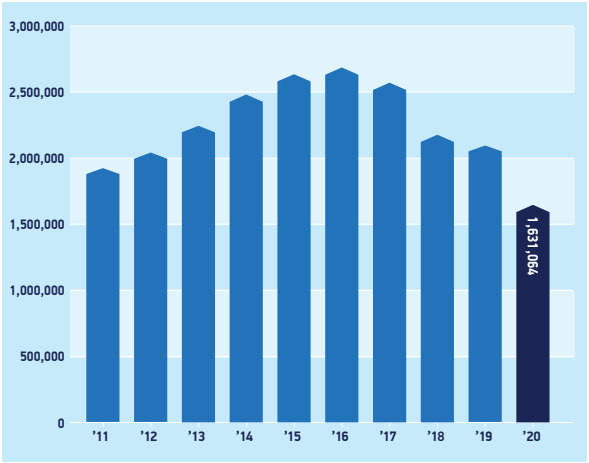
Data from 2019

UK AUTOMOTIVE: £74 BILLION TRADE HUB

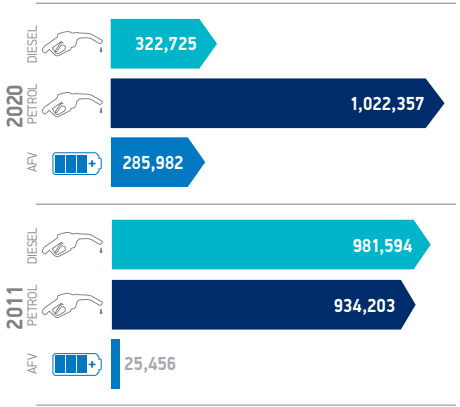


NEW CAR REGISTRATIONS

Annual New Car Registrations – 2011 to 2020



New car registrations by fuel type – 2020 vs 2011

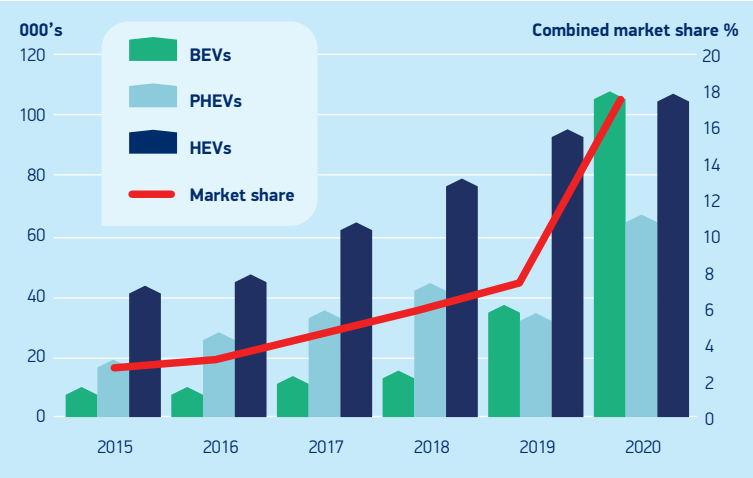


Top 10 UK sellers in 2020

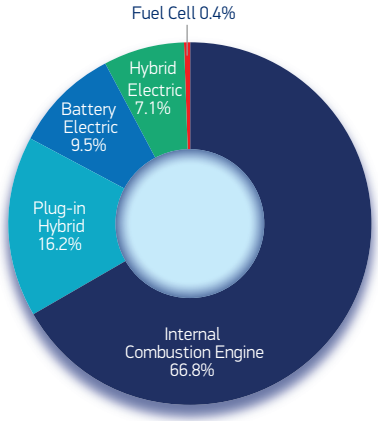
	Model	Volume
1	Ford Fiesta	49,174
2	Vauxhall Corsa	46,439
3	Volkswagen Golf	43,109
4	Ford Focus	39,372
5	Mercedes-Benz A-Class	37,608
6	Nissan Qashqai	33,972
7	MINI	31,233
8	Volkswagen Polo	26,965
9	Ford Puma	26,294
10	Volvo XC40	25,023

REGISTRATIONS OF ALTERNATIVELY FUELLED VEHICLES

New Battery Electric, Plug-In Hybrid and Hybrid Electric Vehicles registrations



Available models March 2021



308 Internal Combustion Engine

75 Plug-in Hybrid

44 Battery Electric

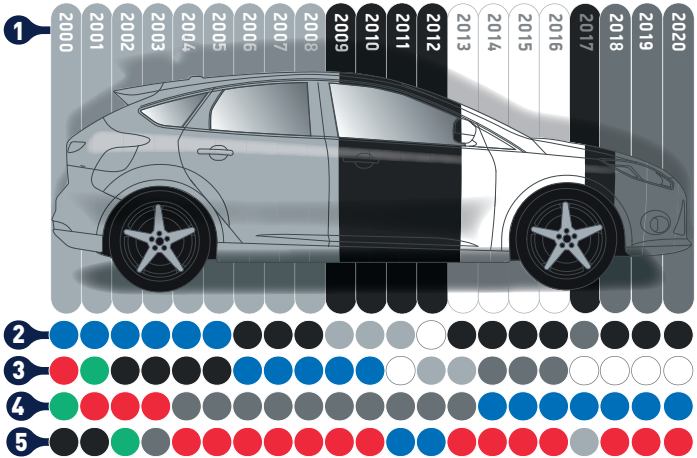
33 Hybrid Electric

2 Fuel Cell

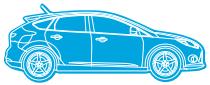
Source: SMMT data

CHANGING CONSUMER TASTES

Changing tastes in car colour: Top 5 2000-2020



Shift in market segment – 2020 vs 2011



LOWER MEDIUM **-7.2%**

2011 **492,020** / 2020 **456,450**

DUAL PURPOSE **+149.7%**

2011 **165,997** / 2020 **414,461**

EXECUTIVE **-58.5%**

2011 **110,246** / 2020 **45,807**

LUXURY SALOON **-58.1%**

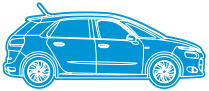
2011 **8,647** / 2020 **3,622**

MINI **-71.1%**

2011 **42,061** / 2020 **12,175**

SUPER MINI **-27.6%**

2011 **701,805** / 2020 **508,087**



MULTI PURPOSE **-67.4%**

2011 **119,651** / 2020 **38,973**

UPPER MEDIUM **-59.3%**

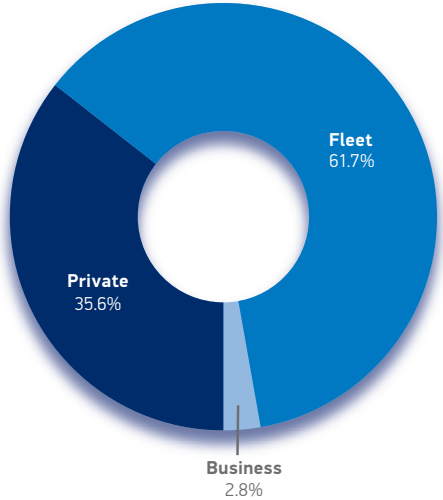
2011 **256,437** / 2020 **104,289**

SPECIALIST SPORTS **+6.3%**

2011 **44,389** / 2020 **47,200**

REGISTRATIONS BY SALES TYPE

2020 registrations by sales type



Top five new car registrations in 2020 by sales type

Private

Model	Volume
Ford Fiesta	31,691
MINI	21,240
Vauxhall Corsa	19,933
Volkswagen Polo	18,706
Ford Focus	16,345

Fleet

Model	Volume
Volkswagen Golf	28,534
Vauxhall Corsa	26,403
Nissan Qashqai	23,189
Ford Focus	23,021
Mercedes-Benz A-Class	22,923

Business

Model	Volume
Fiat 500	1,504
Porsche Taycan	993
Volvo V90	842
MG MG ZS	814
Mitsubishi Outlander	733

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	6,643	54.6%
Volkswagen up!	3,559	29.2%
Smart EQ fourfour	737	6.1%
Smart EQ fourtwo coupé	521	4.3%
SKODA Citigo	300	2.5%

Segment total: 12,175

Model	Volume	Segment share
Ford Fiesta	49,174	9.7%
Vauxhall Corsa	46,439	9.1%
MINI	31,233	6.1%
Volkswagen Polo	26,965	5.3%
Ford Puma	26,294	5.2%

Segment total: 508,087

Model	Volume	Segment share
Volkswagen Golf	43,109	9.4%
Ford Focus	39,372	8.6%
Mercedes-Benz A-Class	37,608	8.2%
Nissan Qashqai	33,972	7.4%
BMW 1 Series	24,932	5.5%

Segment total: 456,450

REGISTRATIONS BY SEGMENT

Top cars registered by segment

Model	Volume	Segment share
BMW 3 Series	23,245	22.3%
Skoda Octavia	12,433	11.9%
Audi A4	10,570	10.1%
Hyundai IONIQ	7,216	6.9%
Jaguar F-Pace	6,669	6.4%

Segment total: 104,289

Model	Volume	Segment share
Mercedes-Benz C-Class	11,230	24.5%
Mercedes-Benz E-Class	10,703	23.4%
BMW 5 Series	10,033	21.9%
Audi A6	4,839	10.6%
Volvo V90	2,562	5.6%

Segment total: 45,807

Model	Volume	Segment share
BMW 7 Series	1,038	28.7%
Bentley Continental	683	18.9%
Mercedes-Benz S-Class	656	18.1%
Audi A8	447	12.3%
Mercedes-Benz SL	225	6.2%

Segment total: 3,622

REGISTRATIONS BY SEGMENT

Top cars registered by segment

Model	Volume	Segment share
Tesla Model 3	24,807	52.6%
Porsche Taycan	3,140	6.7%
Audi TT	3,110	6.6%
BMW 8 Series	2,138	4.5%
Porsche 911	2,053	4.3%

Segment total: 47,200

Model	Volume	Segment share
Volvo XC40	25,023	6.0%
Volkswagen Tiguan	22,771	5.5%
Kia Sportage	19,597	4.7%
Vauxhall Grandland X	18,885	4.5%
Land Rover Range Rover Evoque	18,509	4.5%

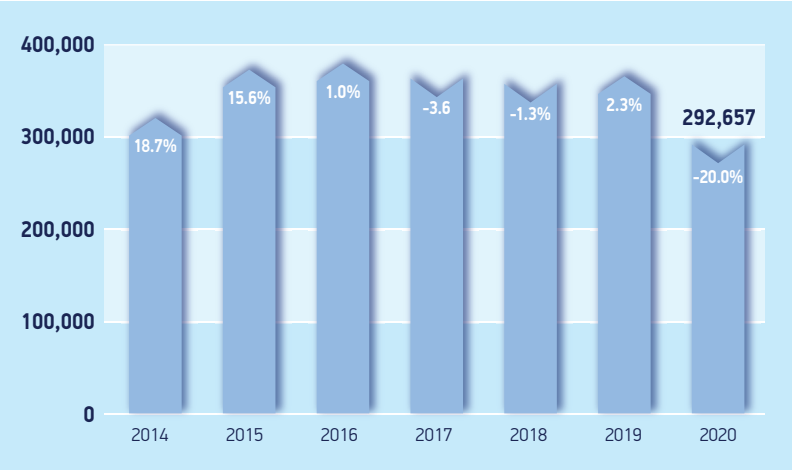
Segment total: 414,461

Model	Volume	Segment share
Ford Tourneo Custom	3,718	9.5%
Vauxhall Combo Life	3,246	8.3%
Mercedes Benz B-Class	2,936	7.5%
Toyota Prius Plus	2,782	7.1%
Peugeot Rifter	2,707	6.9%

Segment total: 38,973

COMMERCIAL VEHICLE REGISTRATIONS

Van registrations – 2014 to 2020



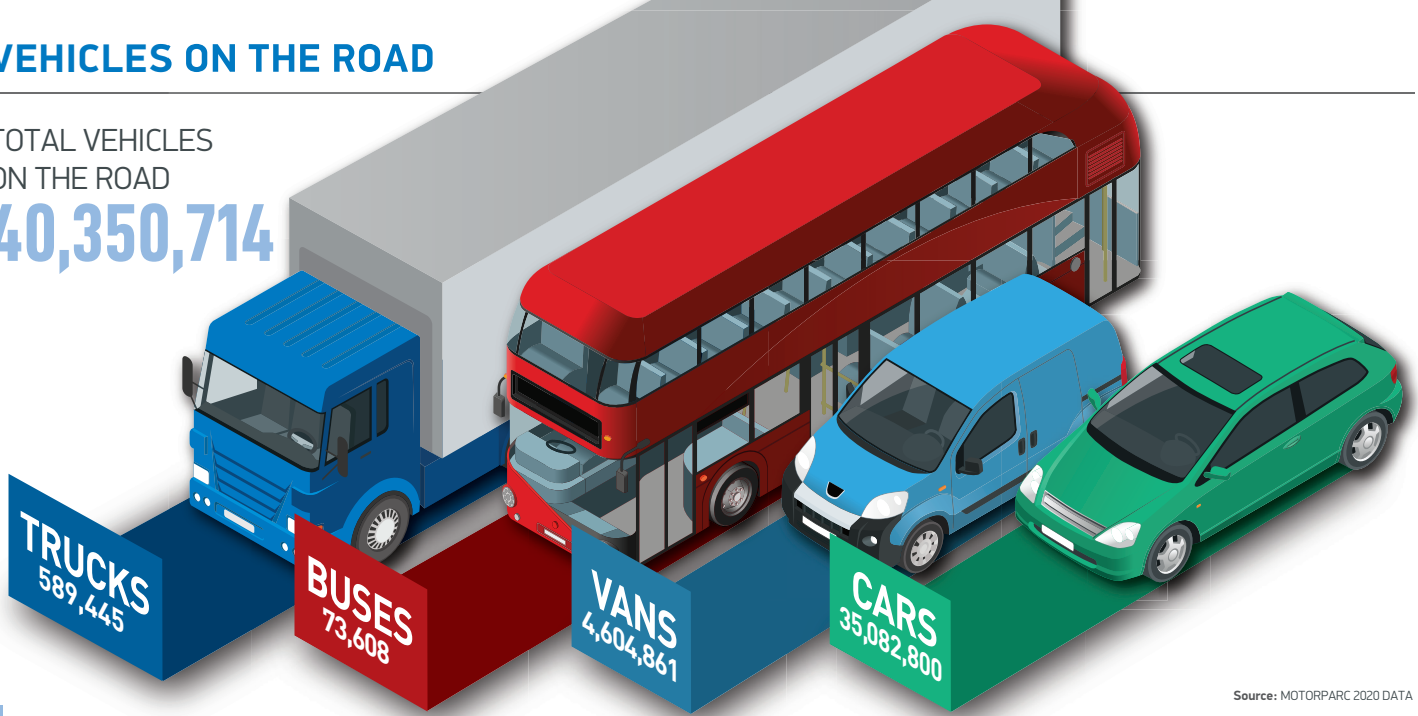
2020 HGV, bus and coach registrations

	Rigids	Artics	Bus and coach
2020	26,344	22,191	5,874
Change on 2019	10.6%	15.1%	-18.8%

VEHICLES ON THE ROAD

TOTAL VEHICLES
ON THE ROAD

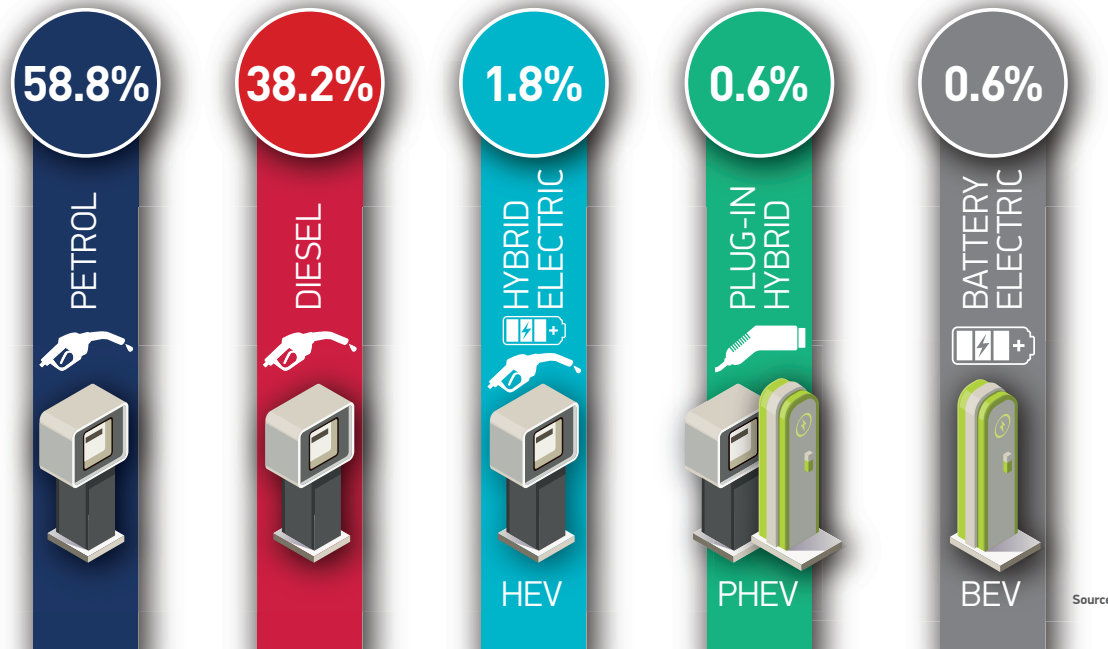
40,350,714



Source: MOTORPARC 2020 DATA

VEHICLES ON THE ROAD

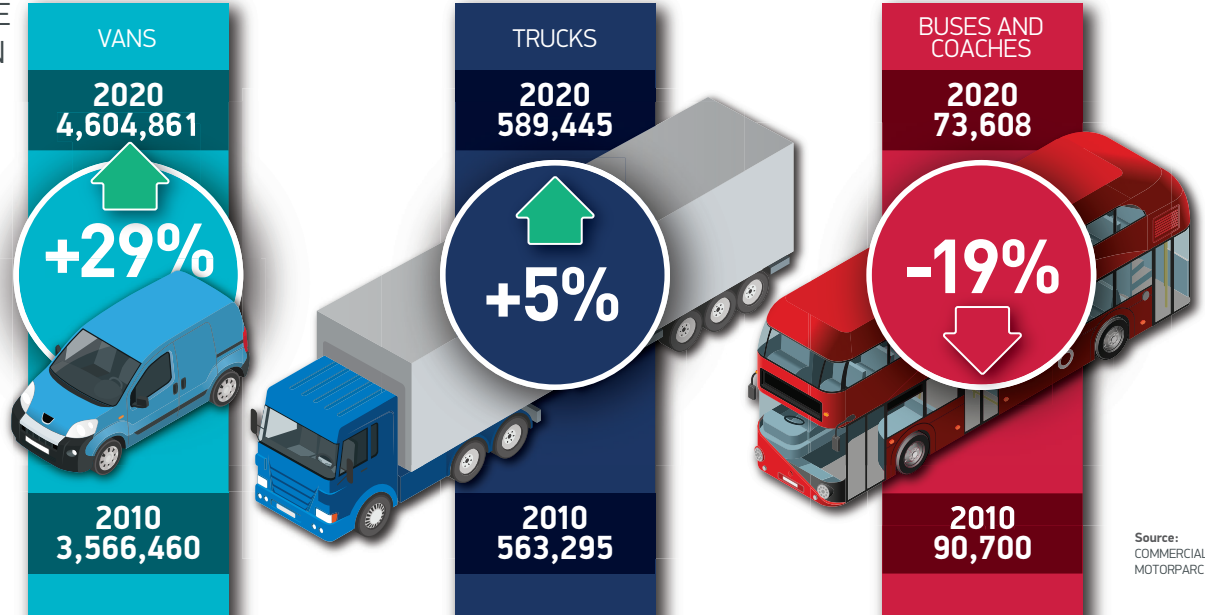
WHAT'S FUELLING OUR CARS?



Source: MOTORPARC 2020 DATA

VEHICLES ON THE ROAD

THE DECADE OF THE VAN



Source:
COMMERCIAL MOTORPARC 2020 DATA

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:

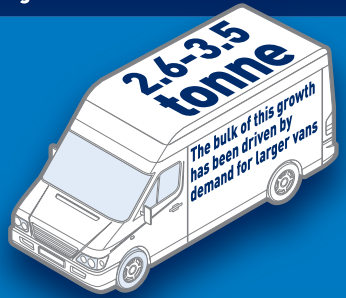
construction; wholesale, retail and repair of motor vehicles; manufacturing; and transport and storage

Construction is the biggest single user of LCVs

LCV sector growth

59%

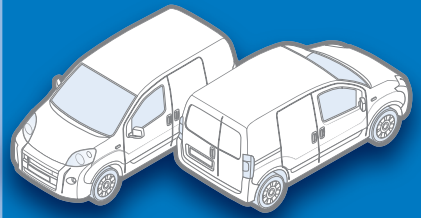
growth in the LCV sector since 2000



The second (and third) life of the LCV

900,000

used vans change hands each year



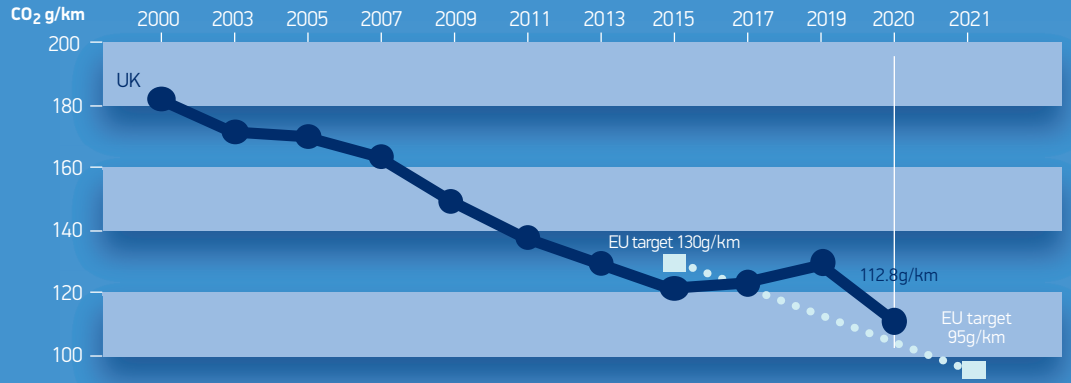
Emissions reduction

CO_2 Emissions

37.7%

DOWN
from 2000 levels

AVERAGE CO_2 EMISSIONS FOR NEWLY REGISTERED CARS FELL –11.8% IN 2020



Source: SMMT 2019

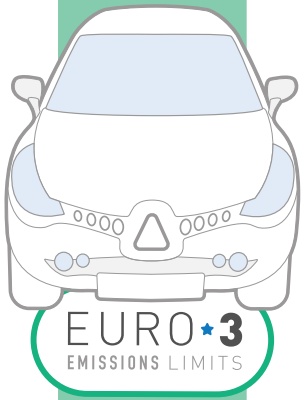
ENVIRONMENT – AIR QUALITY

A **Euro-VI** bus emits

95% less NOx

on the road than a **Euro-V** bus

Source: Transport for London



0.5 g/km

Reduction in diesel car NOx emissions

0.08 g/km

CAR EMISSIONS TESTING

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**

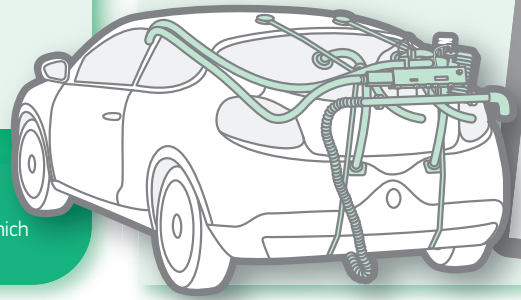
Why do we still need a lab test?

The 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:



RDE provides a snapshot of a vehicle's performance on the road

- **Low speed** (urban roads)
- **Medium speed** (rural roads)
- **High speed** (motorways)
- **Low and high altitudes**
- **Year-round temperatures**
- **Additional vehicle payload**
- **Different gradients**

CONNECTED AND AUTONOMOUS VEHICLES

Potential overall impact of CAVs on the UK economy by 2030

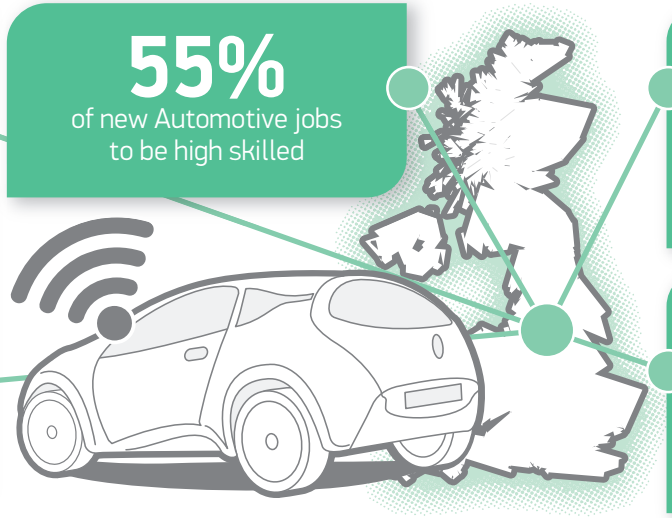
+£62 billion
economic growth

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 vehicle 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

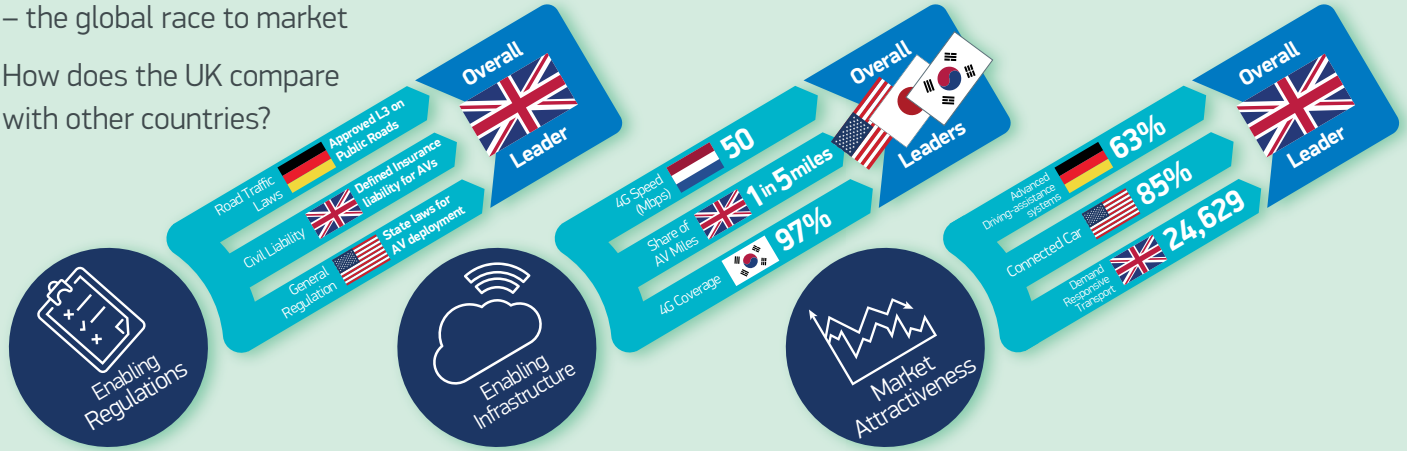
Blind Spot Information System
helps detect vehicles in driver's blind spot when changing lane.

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

CONNECTED AND AUTONOMOUS VEHICLES

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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MOTOR INDUSTRY

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