SMMT
DRIVING THE
MOTOR INDUSTRY

THE SOCIETY OF MOTOR MANUFACTURERS AND TRADERS
MOTOR INDUSTRY FACTS 2013

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SMMT VEHICLE DATA

SMMT Automotive Information Services (AIS) is the definitive source for data on the UK motor industry.

From manufacturing and first registration to vehicles on the road (parc), SMMT provides the most up-to-date and accurate industry data available.

TO FIND OUT MORE, GO TO: www.smmt.co.uk/data.

ABOUT SMMT

SMMT
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MOTOR INDUSTRY

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.

As a membership organisation, SMMT represents more than 550 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.

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. It undertakes a variety of activities to support and represent the interests of the industry and has a long history of achievement.

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

SMMT policy priorities for 2013

SMMT will concentrate its work with government and stakeholders in 2013 on delivering the automotive industry's priorities for growth and industrial strategy. It will focus on:

- Building lasting capabilities, structures and supportive policies for automotive in the UK and EU.
- Supporting the Automotive Council agenda for maximising the UK benefit from the global shift to ultra-low carbon vehicles.
- Helping the UK to exploit the supply chain opportunities arising from £6bn of automotive investment announced during the past two years.

The six key priority areas in 2013 will be:

Industrial strategy and delivery for automotive

- Working closely on a sector strategy to include government/industry collaboration and support for the Automotive Council.
- Helping to shape a leading ultra-low carbon vehicle (ULCV) market.
- Delivering supply chain opportunities and access to finance.
- Maintaining a strong voice in Europe.

Low carbon vehicles and technologies

- Delivery on the Automotive Council's technology roadmaps and five strategic technologies.
- Strong and stable framework of ultra-low carbon incentives beyond 2015.

Reform of motoring taxes and energy efficiency regimes

- Vehicle Excise Duty and Company Car Tax must maintain the important diversity of the UK market, incentivise the uptake of ULCVs and not undermine fleet renewal.
- Minimising cost and negative impact on industry competitiveness from changes to UK energy efficiency schemes and energy taxes.

Intensive environmental agenda on CO_2, air quality, noise and biofuels

- Lobbying strongly across a full environmental agenda at UK and EU level, covering CO_2, air quality, noise and alternative fuels, working collaboratively with European and UK stakeholders.

Technology and innovation

- Continuing support for the Automotive Council Technology Group.
- Participating in the work of the Transport Knowledge Transfer Network and high value manufacturing catapult.
- Co-ordinating support for an ultra-low carbon vehicle catapult.

Vehicle legislation

- Helping UK-based trailer makers and bodybuilders comply with new European Whole Vehicle Type Approval requirements through SENTA tools and roadshows.
- Covering L 5-7 category vehicles, both in regard to type approval legislation and other key issues in SMMT's wider lobbying and influencing.

ABOUT SMMT

SMMT group companies

Motor Codes

The government-backed industry self-regulator, Motor Codes operates codes of practice outlining clear-cut customer service level expectations in the new car and service and repair 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.

The **New Car Code** covers over 99% of all new cars sold in the UK and regulates the advertising, sale, warranty, replacement parts availability and complaint handling processes for new cars.

The **Service and Repair Code** helps motorists identify responsible garages committed to providing the highest standards of customer service, from around 7,000 rated garages in the UK. Garages can be identified through the online Garage Finder, helping motorists to identify fair and honest traders based on the feedback of other users.

Motor Codes provides a free garage and customer advice line **(0800 692 0825)** offering advice, arbitration, conciliation and, ultimately, peace of mind for motorists.

For more information, visit **www.motorcodes.co.uk.**

SMMT Industry Forum

Industry Forum was formed in 1994, 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.

Industry Forum delivers significant results in three ways:

- **Practical Solutions** – providing knowledge, hands-on experience and guidance to improve business performance.
- **Learning and Development** – inspiring people through structured training and development programmes to deliver business excellence.
- **Audit and Assessment** – using globally recognised objective assessment criteria to understand, measure and monitor business performance.

To find out more about Industry Forum, visit: **www.industryforum.co.uk.**

The Automotive Council

2012 was a significant year for the Automotive Council, which has now been working strategically to map the course of industry for the last three years. As a joint partnership between the UK's automotive industry and government, the Council has made considerable progress, creating a forum for knowledge sharing and opening up a wealth of new opportunities for the sector.

In the last year alone, the Council has worked with industry to identify more than £3bn worth of opportunities for the UK's automotive supply chain; hosted an Intelligent Mobility Summit to enhance dialogue on new, emerging technologies; held a strong presence at the CENEX LCV exhibition and supported a number of careers and skills-led initiatives including 'See Inside Manufacturing' and 'Meet the Engineer'.

The Council is co-chaired by the Secretary of State for Business, Innovation and Skills (BIS), Dr Vince Cable MP and industry chair, Richard Parry-Jones CBE, and brings together senior executives from across the industry.

The work of the Council is channelled through two sub-groups, the Supply Chain Group and Technology Group, ensuring the Council is adept to support the UK's dynamic, innovative and cutting-edge automotive sector.

Over the next decade the Automotive Council will work to enhance the attractiveness of the UK as a location for global automotive investment, promoting it as a compelling proposition for world class automotive manufacturing, R&D and skills capabilities.

To find out more about the Automotive Council's work to support the long-term goals of the UK automotive industry, visit: **www.automotivecouncil.co.uk.**

INDUSTRY PERFORMANCE

Did you know?

- On average over the last decade, the UK has produced 1.6 million cars and commercial vehicles and more than 2.5 million engines annually. 1.58 million vehicles and 2.5 million engines were made in the UK last year, and of these, 81% of total vehicles and 62% of engines were exported.
- UK automotive is a vital part of the UK economy and typically generates more than £55 billion in annual turnover, delivering around £12 billion in net value-added to the economy.
- The automotive industry is the UK's largest sector in terms of exports by value and generated £27 billion of revenue for the UK in 2011. In a typical year, the sector exports to over 100 markets worldwide and accounts for around 11% of total UK exports[1].
- Average new car CO_2 emissions fell to a new low of 133.1g/km in 2012, and have fallen by over 20% in the last 10 years[2].
- UK automotive is at the forefront of the low carbon agenda, investing in R&D and new technologies that will deliver ever cleaner, safer and more fuel-efficient cars.

The UK is home to:

- Seven volume car manufacturers.
- Eight major premium and sports car manufacturers and more than 100 specialist brands.
- Eight commercial vehicle manufacturers.
- Ten bus and coach manufacturers.
- Around 2,350 component manufacturers, ranging from large companies competing globally to small and medium sized businesses (SMEs) actively involved in the UK supply chain[3].
- Eight Formula One teams and the largest concentration of motorsport firms found within Motorsport Valley, located in the centre of the UK[4].

Sources:
1. Invest Now Report 2011
2. 13th SMMT Annual Sustainability Report
3. Growing the Automotive Supply Chain 2011
4. Motorsport Industry Association

INDUSTRY PERFORMANCE

UK sector profile

	2007	2008	2009	2010	2011
Automotive manufacturing sector turnover (£bn)	53.2	53.2	41.0	49.0	56.0
Share of total transport manufacturing turnover (%)	67.0	72.1	64.0	65.8	66.2
Total net capital investment (£bn)	0.9	1.3	1.2	1.4	1.5
Automotive sector value added (£bn)	10.3	10.8	6.6	10.6	12.3
Total employees directly dependent on the UK automotive sector	840,000	807,000	736,000	737,000	720,000
Value of exports (£bn)	26.1	28.0	23.8	29	27
Percentage of total UK exports (%)	11.8	11.8	10.5	10.9	9.2
All automotive sectors - value added share of GVA (%)	3.3	2.6	2.2	2.6	2.8
UK share of global passenger car production (%)	2.4	2.3	1.8	1.8	2.3
Number of UK volume car manufacturers	7	7	7	7	7
Number of UK volume commercial vehicle manufacturers	9	9	9	8	8

To highlight the varied challenges facing the automotive industry and its response to them, SMMT launched its annual 'Award for Automotive Innovation' to encourage and recognise the creation and development of new innovative products, technologies and ideas that could change the face of the UK automotive industry. For more information, visit: **www.smmt.co.uk/aai.**

Research and development, technology and innovation

The automotive industry has been a constant innovator of new products to encourage safer and greener motoring. At €20 billion per year, the automotive sector is Europe's largest investor in R&D, driving industry forward and helping to deliver more sustainable motoring for the 21st century.

In 2012, the government confirmed that an 'above the line' R&D tax credit will be introduced from April 2013 with a minimum rate of 9.1% before tax. The change is likely to make projects more affordable at the relevant decision making point by an R&D team, which should encourage higher spend in the UK.

The 2012 Budget also outlined that non-profit making companies will be able to claim a payable credit. Sending a strong signal to international investors, the move could see an additional £390 million of R&D investment in the UK each year and increased economic output of £665 million in the short term.

Source: R&D tax relief reform – an economic study (EEF, SMMT and PwC) 2011

INDUSTRY PERFORMANCE

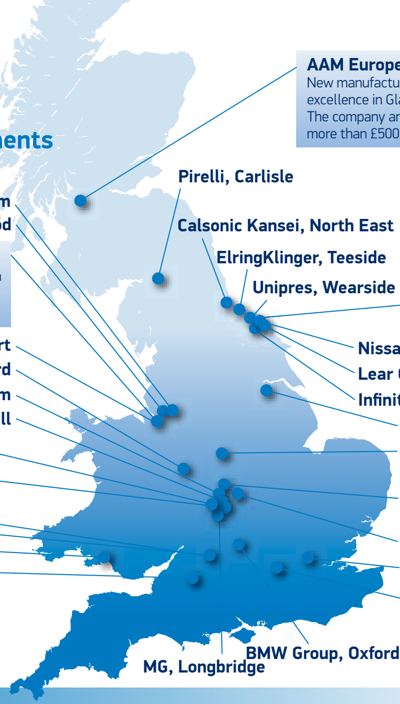
New investment to support growth

The automotive industry is truly global. Attracting inward investment to the UK remains a high priority for industry and government.

2012 saw a number of high-profile announcements from global OEMs regarding investment in the UK automotive sector.

For details, visit **www.smmt.co.uk/investment**

2012 investment announcements



INDUSTRY PERFORMANCE

The UK supply chain

- Of all UK suppliers, more than 70% manufacture their products in the UK.
- At present, about 80% of all component types required for vehicle assembly operations can be procured from UK suppliers.
- The UK automotive supply chain typically generates £4.8bn of added value annually.
- There are around 2,350 UK companies that regard themselves as 'automotive' suppliers, employing around 82,000 people (2009 data).
- It is estimated that every job in UK vehicle assembly supports 7.5 elsewhere in the economy.
- UK-based OEMs are actively committed to increasing local sourcing practices to support new model programmes and facility expansion.

Growing the supply chain

The strength and capability of the automotive supply chain is a crucial factor in driving growth and attracting inward investment. In 2012, the Automotive Council identified more than £3bn worth of opportunities available to domestic suppliers and international companies wishing to invest in the UK. The report *Growing the Automotive Supply Chain: The road forward* found that increasing high-value international investment in UK automotive has created a wealth of new opportunities at every level of the supply chain. To maximise these opportunities UK automotive suppliers need:

- Access to specialist finance options to support growth.
- To build a globally-competitive skill set.
- To invest in innovation, R&D and capital equipment.
- To achieve global quality, cost and delivery.

For more information on strengthening the UK supply chain, visit **www.automotivecouncil.co.uk.**

SMMT is committed to strengthening the UK supply chain and hosts a number of events and activities to support suppliers and encourage greater levels of local sourcing. To find out more about SMMT's supply chain activities, visit: **www.smmt.co.uk/supply-chain.**

INDUSTRY PERFORMANCE

Employment, skills and training

Did you know?

- From design and manufacturing to retail and aftermarket services, the UK automotive industry offers a range of fantastic career opportunities.
- There are around 720,000 people employed across the automotive industry, with 140,000 people directly employed in manufacturing[1].
- New investment pledged by global vehicle manufacturers during the last two years has created more than 19,000 new jobs at facilities and in the supply chain, safeguarding thousands more[2].
- Approximately 50,000 people are employed in UK motorsport and more than 7,500 jobs are within automotive R&D[1].

Skills, apprenticeships and training in the automotive sector

Industry fully recognises the importance of attracting the brightest and best talent into the sector, and invests heavily in apprenticeships as well as long-term training and development programmes.

Key facts:

- More than 75,000 young people have been employed as apprentices in engineering and manufacturing industries during the last five years, maintaining a large, highly-skilled talent pool[3].
- Apprenticeship starts in UK engineering and advanced manufacturing industries have increased by more than 85% in the past two years[3].
- There are approximately 18,000 apprentices working in automotive retail at any one time[4].
- To support the development of apprenticeships in the UK, the government launched the Higher Apprenticeship Fund in 2012. The fund is available to a number of key sectors identified by government including automotive and is worth £6 million.

See Inside Manufacturing

See Inside Manufacturing is a careers-focused initiative designed to give young people a behind-the-scenes glimpse of life in the manufacturing sector, the potential for jobs and the rewards it offers.

UK automotive trail-blazed this programme in 2011 with more than 40 companies inviting pupils, teachers and careers advisors to experience first-hand some of the UK's world-class automotive and motorsport facilities and research centres.

In 2012, the UK automotive industry once again played a significant role in the initiative alongside two other sectors that were introduced - aerospace and defence and food and drink.

The programme is returning again in 2013 and is open to all young people in the UK, providing a unique opportunity to learn about modern manufacturing and the range of jobs available in these diverse sectors.

see inside manufacturing

Sources:
1. SMMT's 13th Annual Sustainability Report
2. www.smmt.co.uk/investment
3. Semta, www.semta.org
4. IMI Automotive Skills Sector Qualifications Strategy, Nov 2011

Legislation in the automotive industry

The automotive industry is subject to numerous national, EU and global laws and regulations including those relating to vehicle safety and environmental issues such as emissions levels, fuel economy and manufacturing practices.

Key environmental legislation

There are several recent environmental policies that are now impacting the automotive industry including:

- **New car CO_2 regulation**
  In 2009, legislation was passed that committed European car manufacturers to cut fleet average CO_2 emissions from new cars to 130g/km by 2015 and 95g/km by 2020. The legislation sets out a progressive phase-in for car manufacturers with 65% of new cars averaging the 130g/km target by 2012, 75% by 2013, 80% by 2014 and 100% by 2015. Derogations exist for niche and small volume manufacturers.

- **Van CO_2 regulation**
  The Van (Light Commercial Vehicle) CO_2 Regulation sets a European fleet average target of 175 CO_2 g/km, phased in between 2014-2016 and a long-term target of 147g/km in 2020. Each manufacturer's target is based on the weight of each new van it registers in the EU in a given year.

- **Euro standards**
  Euro engine emission standards were introduced in the early 1990s to reduce pollutants from vehicles. They have led to significant improvements in emissions of nitrogen oxides, particulates and hydrocarbons from passenger cars, vans and trucks. Euro V is already standard for all new cars and commercial vehicles. Euro VI will apply to newly-registered heavy commercial vehicles from 2014, cars from September 2015, and vans from September 2016.

- **Energy efficiency regimes**
  In addition to efforts to reduce CO_2 from vehicle tailpipes, industry is also committed to reducing emissions from the manufacturing process. There are several energy efficiency regimes that the industry is covered by including the mandatory EU Emissions Trading Scheme (EUETS), the voluntary UK Climate Change Agreements (CCAs), and the UK Carbon Reduction Commitment (CRC) energy efficiency scheme.

For more information on how the automotive industry is reducing its environmental impacts, visit **www.smmt.co.uk/sustainability**.

The 14th edition of SMMT's Annual Sustainability Report will be published in 2013.

Other key legislation

- **Vehicle safety - ESC**
  From 1 November 2011 all new type approved vehicles were required to have Electronic Stability Control fitted as standard and from 1 November 2014 all newly-registered vehicles must also comply. ESC helps significantly to reduce the risk of a vehicle sliding if a bend is taken too fast or skidding during a sudden emergency manoeuvre. ESC identifies the risk early and stabilises the car by managing braking and/or power delivery to individual wheels.

- **Tyre Pressure Monitoring Systems (TPMS)**
  From 1 November 2012 all new type approved vehicles were required to have Tyre Pressure Monitoring Systems fitted as standard and from 1 November 2014 all newly-registered vehicles must also comply. By continuously monitoring the pressure of the tyres, TPMS alerts the driver to under-inflation. Failure to maintain the correct tyre pressure leads to increased fuel consumption and shorter tyre life.

SMMT European and National Type Approval (SENTA) Guide

In 2009, the European Whole Vehicle Type Approval Directive came into effect and applies to anyone involved in the building or part-building of all vehicles including cars, buses, coaches, vans, trucks, trailers and other special purpose vehicles.

Whole Vehicle Type Approval is the process by which vehicles, their systems and components are approved to the appropriate National and European environmental and safety standards. Without it, vehicles cannot be sold or registered in Europe.

To ease vehicle manufacturers and bodybuilders through the complicated European Community whole vehicle type approval system, SMMT has developed the *SENTA Guide*.

SENTA is a step-by-step guide to the legislation. It is free to SMMT members and available to non-members with an annual subscription charge.

For more information and to register for access, visit: **www.smmt.co.uk/SENTA.**

Export and trade

Exports of UK-built cars and commercial vehicles, by destination 2008-2012

	2008	2009	2010	2011	2012
All UK exports (millions)	1.254	0.829	1.047	1.194	1.275
EU26*	60.3%	71.3%	64.5%	60.9%	51.0%
Russia	13.8%	3.8%	5.0%	8.1%	10.6%
US	8.5%	9.5%	9.1%	7.5%	9.3%
China	1.4%	2.3%	4.2%	5.1%	8.1%
Japan	1.4%	1.5%	1.5%	1.2%	1.5%
Other	14.6%	11.6%	15.8%	17.2%	19.5%

** EU26 is the EU27 without the UK, as this table identifies export destinations*

SMMT works to develop global exposure for the UK automotive industry. Through leading effective participation in international events, trade missions, seminars and exhibitions, often in collaboration with UKTI, SMMT provides support to grow businesses throughout the world and tap into new opportunities.

To find out more, visit: **www.smmt.co.uk/international**

UK AUTOMOTIVE MANUFACTURING

Top five UK automotive manufacturers 2012

Car	
Make	Volume
Nissan	510,572
Land Rover	305,467
MINI	207,530
Honda	165,630
Toyota	109,429

Model		
Make	Model	Volume
Nissan	Qashqai	310,837
MINI	MINI	207,530
Nissan	Juke	154,759
Land Rover	Evoque	112,331
Vauxhall	Astra	90,187

Commercial Vehicle	
Make	Volume
Vauxhall	59,472
Ford	28,031
Leyland Trucks	14,685
Land Rover	6,281
Alexander Dennis	1,762

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	Cygnet, DB9, Rapide, Vanquish, Vantage
3	Bentley	Crewe	Car, engine	Continental 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, Dagenham and Southampton	Engine	Engine range
10	Honda	Swindon	Car, engine	Civic, CR-V and Jazz

Key	Manufacturer	Location	Sector	Model
11	Jaguar	Castle Bromwich	Car	XJ, XF, XK
12	John Dennis Coachbuilders	Guildford	Bus and coach	Minibus range
13	Land Rover	Halewood and Solihull	Car and CV	Defender CV, Defender, Discovery, Evoque, Freelander and Range Rover
14	Leyland Trucks	Leyland	CV	DAF CF, LF and XF truck range
15	Lotus	Norwich	Car	Elise, Evora and Exige
16	LTI	Coventry	CV	TX Taxi
17	Mellor Coachcraft	Bolton	Bus and coach	Minibus range
18	McLaren Automotive	Woking	Car	MP4-12C
19	MG Motors	Longbridge	Car	MG6
20	Michelin	Ballymena (NI), Dundee and Stoke-on-Trent	Tyre	Car, Truck and Truck remould tyre range

UK AUTOMOTIVE MANUFACTURING

Key	Manufacturer	Location	Sector	Model
21	MINI	Oxford and Swindon	Car and CV	MINI range
22	Minibus Options	Whaley Bridge	Bus and coach	Minibus range
23	Morgan	Malvern	Car	Aero, 4/4, Plus 4, Plus 8, Roadster
24	Nissan	Sunderland	Car, engine	Juke, LEAF, Note and Qashqai
25	Optare	Leeds	Bus and coach	Solo,Tempo and Versa bus range
26	Plaxton	Scarborough	Bus and coach	Cheetah, Elite, Panther, Paragon coach bodies and Enviro bus range
27	Rolls-Royce	Goodwood	Car	Ghost and Phantom
28	Smith (Tanfield)	Tyne and Wear	CV	Newton and Edison
29	Toyota	Burnaston and Deeside	Car, engine	Auris and Avensis
30	Vauxhall	Ellesmere Port and Luton	Car, CV and Bus and coach	Astra, Vivaro van and minibus range
31	Warnerbus	Dunstable	Bus and coach	Minibus range
32	Wrightbus	Ballymena (NI)	Bus and coach	Bus range

UK AUTOMOTIVE MANUFACTURING

UK car manufacturing output annual totals

Year	Production	% Change	Home market	% Change	% of Total	Export market	% Change	% of Total
2003	1,657,558	1.7%	523,799	-10.1%	31.6%	1,143,759	9.2%	69.0%
2004	1,646,750	-0.7%	463,994	-11.4%	28.2%	1,179,756	3.1%	71.6%
2005	1,595,697	-3.1%	411,194	-11.4%	25.8%	1,184,503	0.4%	74.2%
2006	1,442,085	-9.6%	343,937	-16.4%	23.8%	1,106,093	-6.6%	76.7%
2007	1,534,567	6.4%	349,108	1.5%	22.7%	1,185,459	7.2%	77.3%
2008	1,446,619	-5.7%	318,033	-8.9%	22.0%	1,128,586	-4.8%	78.0%
2009	999,460	-30.9%	237,226	-25.4%	23.7%	762,234	-32.5%	76.3%
2010	1,270,444	27.1%	309,024	30.3%	24.3%	961,420	26.1%	75.7%
2011	1,343,810	5.8%	219,134	-29.1%	16.3%	1,124,676	17.0%	83.7%
2012	1,464,906	9.0%	252,875	15.4%	17.3%	1,212,031	7.8%	82.7%

UK car manufacturing peaked in 1972 at 1.92 million units, and 2003 saw the highest car output in recent years, totalling 1.65 million units. Although car manufacturing levels have not yet matched pre-recession levels, full year 2012 figures confirm that UK car manufacturing reached its highest since 2008 and broke all-time export records. The volume of cars sent overseas exceeded 1.2 million units, up 8% on 2011.

UK AUTOMOTIVE MANUFACTURING

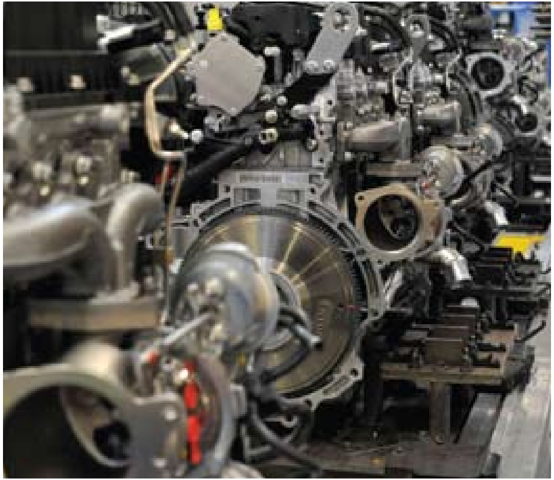
UK commercial vehicle manufacturing output annual totals

Year	Production	% Change	Home market	% Change	% of total	Export market	% Change	% of Total
2003	188,871	-1.3%	85,954	11.6%	45.5%	102,917	-9.9%	54.5%
2004	209,293	10.8%	81,186	-5.5%	38.8%	128,107	24.5%	61.2%
2005	206,753	-1.2%	76,480	-5.8%	37.0%	130,273	1.7%	63.0%
2006	207,704	0.5%	71,485	-6.5%	34.4%	136,219	4.6%	65.6%
2007	215,686	3.8%	84,124	17.7%	39.0%	131,562	-3.4%	61.0%
2008	202,896	-5.9%	77,285	-8.1%	38.1%	125,611	-4.5%	61.9%
2009	90,679	-55.3%	24,225	-68.7%	26.7%	66,454	-47.1%	73.3%
2010	123,019	35.7%	37,472	54.7%	30.5%	85,547	28.7%	69.5%
2011	120,189	-2.3%	50,813	35.6%	42.3%	69,376	-18.9%	57.7%
2012	112,039	-6.8%	48,306	-4.9%	43.1%	63,733	-8.1%	56.9%

In the last decade, commercial vehicle manufacturing peaked at 215,686 units in 2007, with 61% of vehicles exported overseas. CV and engine manufacturing output last year reflects weak demand in European economies as instability in the eurozone and fresh austerity measures impact on consumer confidence.

Engine output by manufacturer

	2008	2009	2010	2011	2012
Bentley	7,675	3,596	4,791	7,528	9,108
BMW	371,269	362,300	385,051	433,689	385,410
Ford (Bridgend)	704,181	683,340	680,717	714,709	741,754
Ford (Dagenham)	1,047,570	746,426	959,480	987,078	812,791
Honda	203,647	60,125	136,658	97,368	154,228
Nissan	112,829	108,955	105,766	135,958	267,839
Toyota	297,398	88,714	114,254	127,724	124,241
Total	**3,164,569**	**2,053,456**	**2,386,717**	**2,504,054**	**2,495,371**



UK AUTOMOTIVE MANUFACTURING

Global automotive manufacturing

Rank	Country	Cars	CV	Total vehicles	% Change
1	China	15,523,658	3,748,150	19,271,808	4.6%
2	US	4,105,853	6,223,031	10,328,884	19.3%
3	Japan	8,554,219	1,388,492	9,942,711	18.4%
4	Germany	5,388,456	260,813	5,649,269	-8.1%
5	South Korea	4,167,089	390,649	4,557,738	-2.1%
6	India	3,285,496	859,698	4,145,194	5.5%
7	Brazil	2,623,704	718,913	3,342,617	-1.9%
8	Mexico	1,810,007	1,191,967	3,001,974	12.0%
9	Thailand	957,623	1,525,420	2,483,043	70.3%
10	Canada	1,040,298	1,423,434	2,463,732	15.4%
11	Russia	1,968,789	262,948	2,231,737	12.1%
12	Spain	1,539,680	439,499	1,979,179	-16.6%
13	France	1,682,814	284,951	1,967,765	-12.3%
14	UK	1,464,906	112,039	1,576,945	7.7%
15	Czech Republic	1,171,774	7,164	1,178,938	-1.7%

European manufacturing

Rank	Country	Cars	CV	Total vehicles	% Change
1	Germany	5,388,456	260,813	5,649,269	-8.1%
2	Spain	1,539,680	439,499	1,979,179	-16.6%
3	France	1,682,814	284,951	1,967,765	-12.3%
4	UK	1,464,906	112,039	1,576,945	7.7%
5	Czech Republic	1,171,774	7,164	1,178,938	-1.7%
6	Slovakia	900,000	0	900,000	40.7%
7	Italy	396,817	274,951	671,768	-15.0%
8	Poland	540,000	107,803	647,803	-22.7%
9	Belgium	507,204	34,670	541,874	-8.9%
10	Romania	326,556	11,209	337,765	0.8%

Source: OICA 2013 – some data based on provisional estimates

In 2012, data collected by OICA indicates a total of 63,069,541 cars and 21,071,668 commercial vehicles were manufactured around the world.

NEW CAR REGISTRATIONS

Annual UK totals and top 10 cars

Top 10 cars registered in 2012

	Make and Model	Volume
1	Ford Fiesta	109,265
2	Vauxhall Corsa	89,434
3	Ford Focus	83,115
4	Vauxhall Astra	63,023
5	Volkswagen Golf	62,021
6	Nissan Qashqai	45,675
7	BMW 3 Series	44,521
8	Volkswagen Polo	41,901
9	Mercedes-Benz C-Class	37,261
10	BMW 1 Series	34,488

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Registered	2,579,050	2,567,269	2,439,717	2,344,864	2,404,007	2,131,795	1,994,999	2,030,846	1,941,253	2,044,609
% Change	0.6	-0.5	-0.5	-3.9	2.5	-11.3	-6.4	1.8	-4.4	5.3

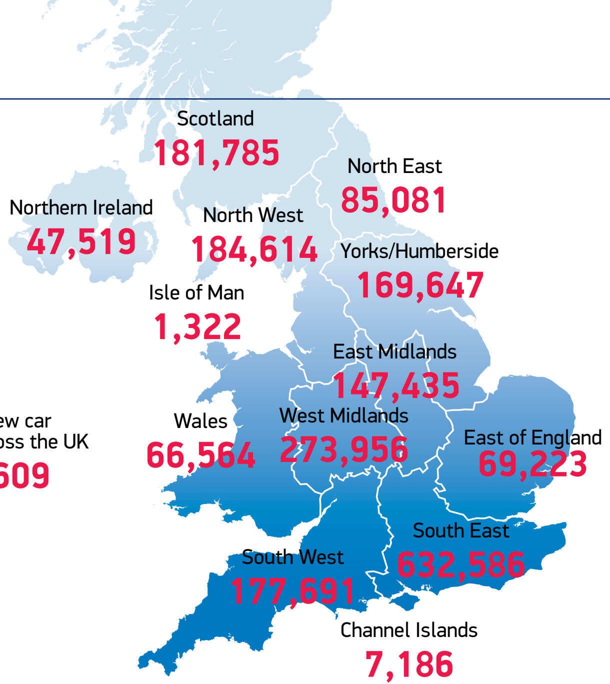
NEW CAR REGISTRATIONS

2012 total new car registrations across the UK

	% Change 2012 vs 2011
West Midlands	9.8%
Scotland	8.9%
Wales	7.1%
North East	6.8%
Yorkshire and the Humber	6.4%
East of England	6.1%
South East	5.4%
North West	4.2%
South West	2.9%
Northern Ireland	0.6%
East Midlands	-2.1%
Isle of Man	-2.9%
Channel Islands	-23.4%
Total UK	**5.3%**

2012 total new car registrations across the UK

2,044,609



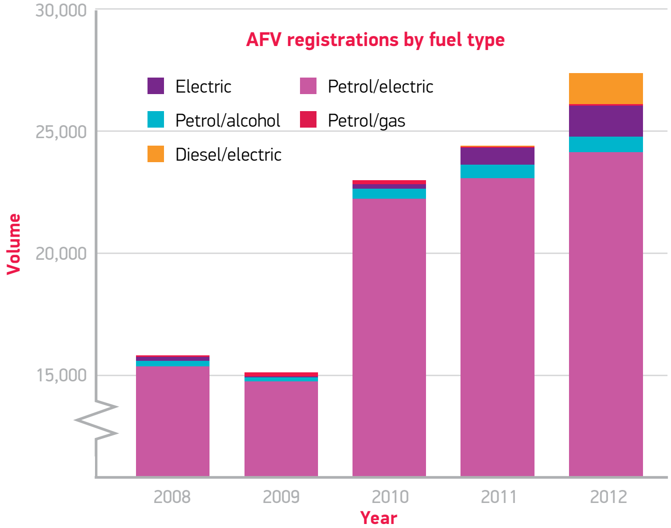
NEW CAR REGISTRATIONS

Alternatively-Fuelled Vehicle registrations by fuel type

Alternatively-Fuelled Vehicles (AFVs) include any vehicle that is not powered solely by a petrol or diesel engine.

Fuel Type	2008	2009	2010	2011	2012
Diesel/Electric	-	-	-	25	1,284
Pure Electric	70	20	138	1,082	1,262
Petrol/Alcohol	240	140	429	884	639
Petrol/Electric	15,385	14,645	22,148	23,373	24,086
Petrol/Gas	26	156	121	76	48

Note: Quadricycles are not counted in SMMT's Pure Electric classification.



NEW CAR REGISTRATIONS

Registrations by sales type

Business, fleet and private registrations

	2008	2009	2010	2011	2012
Business	129,571	98,282	99,608	99,033	89,668
Fleet	1,109,964	882,413	973,233	1,019,126	1,025,501
Private	892,260	1,014,304	958,005	823,094	929,440

Top 10 fleet and business registrations

Make	Range	Volume
Ford	Focus	60,522
Ford	Fiesta	50,357
Vauxhall	Corsa	49,670
Vauxhall	Astra	45,651
Volkswagen	Golf	38,103
BMW	3 Series	30,757
Nissan	Qashqai	30,220
Vauxhall	Insignia	29,315
Mercedes-Benz	C-Class	22,485
Ford	Mondeo	20,477

Registration types

Business

If the vehicle is being sold to/registered by a company that operates up to 24 vehicles, it should be 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 should be 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 should be designated a private sale.

NEW CAR REGISTRATIONS

Segment totals and market share

Segment	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Mini (A)	38,940	36,171	27,195	23,297	21,512	28,094	68,098	53,388	42,061	64,866
%	1.5	1.4	1.1	1.0	0.9	1.3	3.4	2.6	2.2	3.2
Supermini (B)	873,690	839,604	732,756	752,872	783,686	726,006	742,153	739,615	703,925	743,488
%	33.9	32.7	30.0	32.1	32.6	34.1	37.2	36.4	36.3	36.4
Lower Medium (C)	719,163	729,690	761,328	695,436	708,927	605,817	530,849	539,403	489,900	508,262
%	27.9	28.4	31.2	29.7	29.5	28.4	26.6	26.6	25.2	24.9
Upper Medium (D)	480,220	459,061	427,278	393,999	386,414	340,796	283,552	264,251	256,437	237,664
%	18.6	17.9	17.5	16.8	16.1	16.0	14.2	13.0	13.2	11.6
Executive (E)	118,579	109,667	111,112	100,339	104,468	98,572	90,114	99,079	110,246	117,292
%	4.6	4.3	4.6	4.3	4.3	4.6	4.5	4.9	5.7	5.7
Luxury (F)	13,500	13,620	11,678	13,227	13,120	9,977	6,547	8,140	8,647	8,088
%	0.5	0.5	0.5	0.6	0.5	0.5	0.3	0.4	0.4	0.4
Specialist Sports (G)	65,179	73,940	64,681	65,039	65,731	50,256	46,467	46,210	44,389	46,127
%	2.5	2.9	2.7	2.8	2.7	2.4	2.3	2.3	2.3	2.3
Dual Purpose (H)	159,144	179,439	187,392	175,805	176,290	136,525	132,472	156,552	165,997	201,102
%	6.2	7.0	7.7	7.5	7.3	6.4	6.6	7.7	8.6	9.8
Multi-Purpose (I)	110,635	126,077	116,297	124,850	143,859	135,752	94,747	124,208	119,651	117,720
%	4.3	4.9	4.8	5.3	6.0	6.4	4.7	6.1	6.2	5.8
Total	**2,579,050**	**2,567,269**	**2,439,717**	**2,344,864**	**2,404,007**	**2,131,795**	**1,994,999**	**2,030,846**	**1,941,253**	**2,044,609**

NEW CAR REGISTRATIONS

Top cars registered by segment

Model	Registrations	Market Share
Hyundai i10	23,135	35.7%
Volkswagen up!	14,705	22.7%
Suzuki Alto	5,416	8.4%
Vauxhall Agila	4,656	7.2%
smart fortwo coupé	4,481	6.9%

Segment total - 64,866

Model	Registrations	Market Share
Ford Fiesta	109,265	14.7%
Vauxhall Corsa	89,434	12.0%
Volkswagen Polo	41,901	5.6%
Fiat 500	32,973	4.4%
MINI	32,729	4.4%

Segment total - 743,488

Model	Registrations	Market Share
Ford Focus	83,115	16.4%
Vauxhall Astra	63,023	12.4%
Volkswagen Golf	62,021	12.2%
Nissan Qashqai	45,675	9.0%
BMW 1 Series	34,488	6.8%

Segment total - 508,262

NEW CAR REGISTRATIONS

Top cars registered by segment

Model	Registrations	Market Share
BMW 3 Series	44,521	18.7%
Vauxhall Insignia	32,610	13.7%
Volkswagen Passat	21,957	9.2%
Ford Mondeo	21,662	9.1%
Audi A4	20,089	8.5%
Segment total – 237,664		

Model	Registrations	Market Share
Mercedes-Benz C-Class	37,261	31.8%
Mercedes-Benz E-Class	23,594	20.1%
BMW 5 Series	21,566	18.4%
Audi A6	13,097	11.2%
Jaguar XF	11,726	10.0%
Segment total – 117,292		

Model	Registrations	Market Share
Mercedes-Benz S-Class	1,864	23.1%
Jaguar XJ	1,286	15.9%
BMW 7 Series	1,278	15.8%
Audi A8	1,172	14.5%
Bentley Continental	1,139	14.1%
Segment total – 8,088		

NEW CAR REGISTRATIONS

Top cars registered by segment

Specialist Sports

Model	Registrations	Market Share
Mercedes-Benz SLK	6,668	14.5%
Audi TT	6,170	13.4%
Volkswagen Scirocco	5,173	11.2%
Mazda MX-5	3,342	7.3%
MINI Coupé	2,592	5.6%

Segment total – 46,127

Dual Purpose

Model	Registrations	Market Share
Range Rover Evoque	18,143	9.0%
Kia Sportage	14,964	7.4%
Honda CR-V	13,649	6.8%
Land Rover Freelander	11,139	5.5%
Hyundai ix35	11,053	5.5%

Segment total – 201,102

MPV

Model	Registrations	Market Share
Vauxhall Zafira	18,401	15.6%
Ford C-MAX	16,712	14.2%
Ford S-MAX	8,839	7.5%
Ford Galaxy	7,828	6.7%
Mercedes-Benz B-Class	6,594	5.6%

Segment total – 117,720

NEW CAR REGISTRATIONS

International new car registrations 2012

Country	Volume
China[1]	13,196,128
EU27[2]	12,046,189
USA[3]	7,248,910
Japan[4]	4,572,333
Germany[2]	3,082,580
Russia[5]	2,935,111
Brazil[6]	2,851,540
India[7]	2,654,835
UK[2]	2,044,609
France[2]	1,898,760
Italy[2]	1,402,089
Spain[2]	699,589

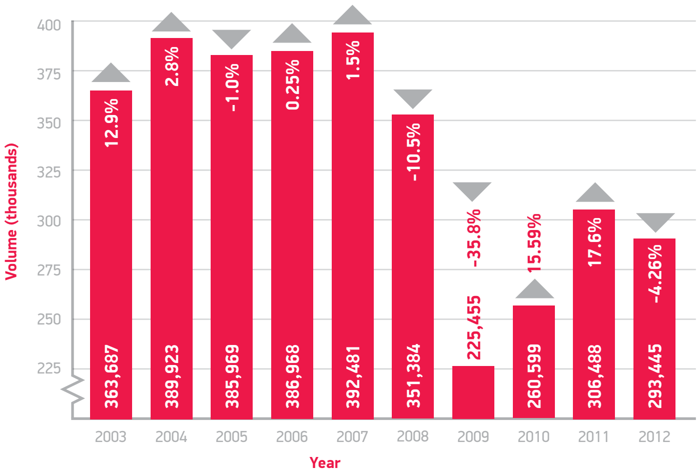
Sources:
1: China Association of Automobile Manufacturers (CAAM) 2: Association des Constructeurs Européens d'Automobiles (ACEA) 3: Alliance of Automobile Manufacturers (Auto Alliance) 4: Japan Automobile Manufacturers Association (JAMA) 5: Association of European Business in the Russian Federation (AEB) 6: Associação Nacional dos Fabricantes de Veículos Automotores (ANFAVEA) 7: Society of Indian Automobile Manufacturers (SIAM)

COMMERCIAL VEHICLE REGISTRATIONS

Annual UK van and truck registrations

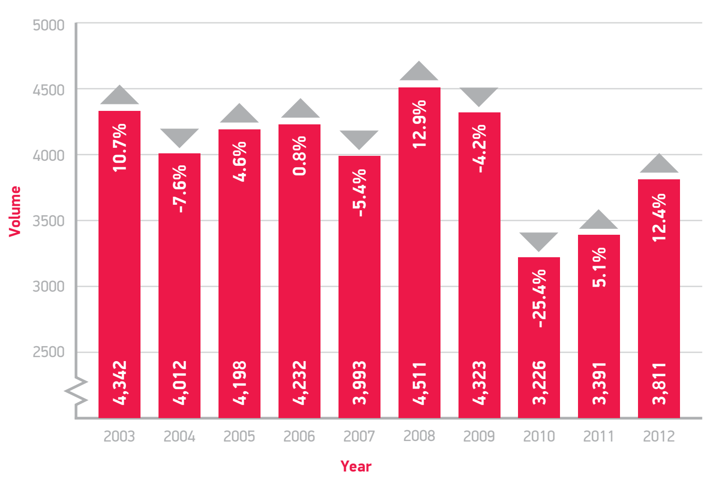
Year	LCVs up to 3.5t	% change on year before	Rigids	% change on year before	Artics	% change on year before
2003	303,755	14.0%	36,788	4.7%	18,802	12.0%
2004	329,599	8.5%	37,461	1.8%	18,851	0.3%
2005	322,930	-2.0%	38,957	4.0%	19,884	5.5%
2006	327,162	1.3%	36,973	-5.1%	18,601	-6.5%
2007	337,741	3.2%	35,614	-3.7%	15,133	-18.6%
2008	289,463	-14.3%	38,651	8.5%	18,759	24.0%
2009	186,386	-35.6%	24,973	-35.4%	9,773	-47.9%
2010	222,915	19.6%	22,383	10.4%	12,075	23.6%
2011	260,153	16.7%	24,524	9.6%	18,420	52.5%
2012	239,641	-7.9%	28,605	16.6%	17,097	-7.2%

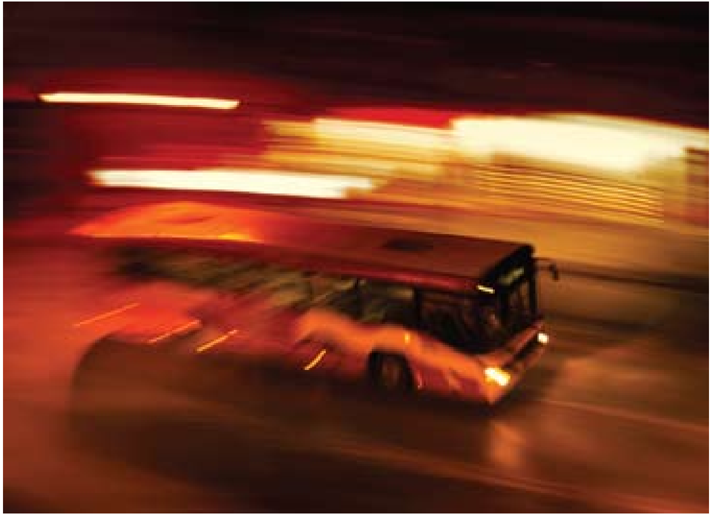
Total UK CV registrations



COMMERCIAL VEHICLE REGISTRATIONS

Annual UK bus and coach registrations



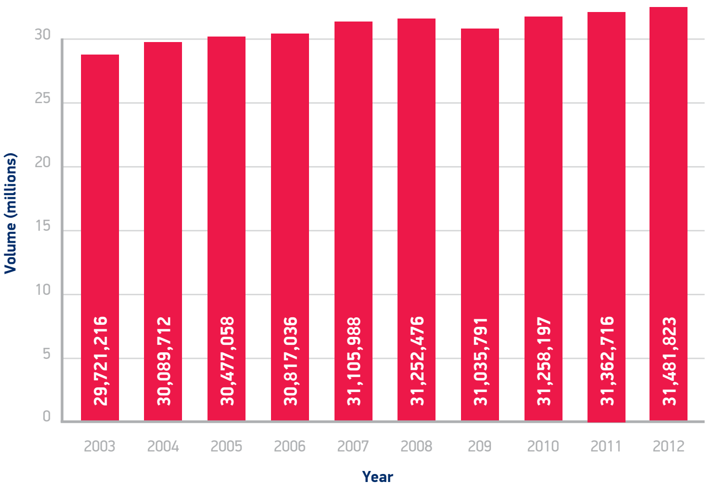


VEHICLES IN USE

Used car sales 2008-2012

Year	Volume
2008	7,186,286
2009	6,798,864
2010	6,797,789
2011	6,778,759
2012	6,743,080

Number of cars on the road 2003-2012



In 2012, some 15% of the car parc emitted 130g/km CO_2 or less.

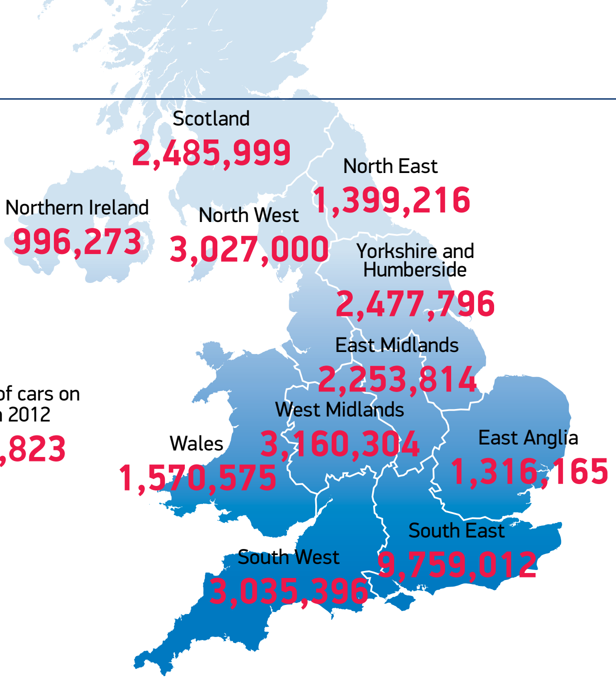
VEHICLES IN USE

Cars on UK roads by region in 2012

	% change 2012 vs 2011
South West	0.9%
East Anglia	0.8%
South East	0.7%
Scotland	0.6%
Northern Ireland	0.5%
Yorkshire and Humberside	0.3%
East Midlands	0.3%
Wales	0.3%
North East	-0.2%
North West	-0.4%
West Midlands	-0.4%
UK total	**0.4%**

Total number of cars on UK roads in 2012

31,481,823



VEHICLES IN USE

Age of cars on the road

Years old	Year	Volume
Less than three	2012-2010	5,934,404
Three to six	2009-2007	6,338,691
Six to nine	2006-2004	6,948,141
Nine to twelve	2003-2001	6,584,857
More than twelve	Pre-2001	5,675,730
Total		**31,481,823**

Colours of cars on the road 2003 versus 2012

Top five colours in 2003

Colour	Volumes	% of Parc
Blue	7,235,456	24.9%
Red	5,790,899	20.0%
Silver	5,033,852	17.4%
Green	3,358,334	11.6%
Black	2,348,798	8.1%

Top five colours in 2012

Colour	Volumes	% of total parc
Silver	8,000,859	25.4%
Blue	6,643,045	21.1%
Black	5,606,104	17.8%
Red	3,483,638	11.1%
Grey	3,261,933	10.4%

The average car on the road in the UK is silver, from the Supermini segment and aged 7.6 years.

VEHICLES IN USE

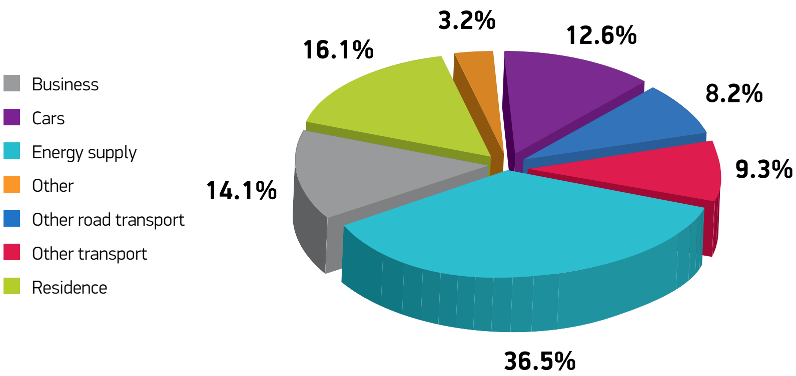
Annual totals of commercial vehicles on UK roads 2003-2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
LCV	2,979,759	3,109,744	3,227,461	3,420,620	3,545,724	3,600,116	3,534,664	3,566,460	3,614,664	3,631,595
HCV	587,862	580,718	586,129	595,266	598,447	589,129	558,076	563,295	563,872	557,128
Bus and coach	101,069	102,978	103,175	102,401	103,817	95,961	88,779	90,700	91,105	90,355
Total CV	**3,668,690**	**3,793,440**	**3,916,765**	**4,118,287**	**4,247,988**	**4,285,206**	**4,181,519**	**4,220,455**	**4,269,641**	**4,279,078**

UK CO_2 emissions by source ($MtCO_2e$)

$MtCO_2e$ = Million tonnes carbon dioxide equivalent

Source category	2009	2010	% Change
Cars	69.7	67.4	-3.3
Other road transport	41.4	43.7	5.5
Other transport	52.8	49.7	-5.8
Energy supply	189.8	195.7	5.9
Business	76	75.6	-0.4
Residence	74.7	86.5	15.8
Other	16.4	17.4	6.0



Source: Department of Energy and Climate Change (DECC)

ENVIRONMENTAL PERFORMANCE

Sustainable manufacturing

Since SMMT began collating data on sustainable manufacturing processes in 1999, vehicle manufacturers have made great strides in reducing the environmental impact of their UK facilities, making more efficient use of natural resources.

Despite an inherent link between production volumes and resource consumption, the automotive industry has improved energy efficiency considerably and applied a closed loop approach to materials management.

In 2011, UK vehicle manufacturers reduced energy consumption per vehicle produced by 14%.

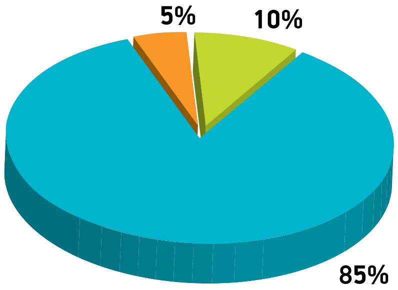
Environmental Performance

		2010	2011	Percentage change
Production inputs				
Total combined energy use	(GWh) (AS)	4,659	4,381	-6.0
Energy used per vehicle produced	(MWh/unit) (VMs)	2.6	2.2	-14.0
Total combined water use	(000m^3) (AS)	5,468	4,875	-10.8
Water use per vehicle produced	(m^3/unit) (VMs)	3.2	2.8	-14.9
Material output				
Total combined CO_2 equivalents	(tonnes) (AS)	1,442,896	1,395,233	-3.3
CO_2 equivalents per vehicle produced	(tonnes/unit) (VMs)	0.8	0.7	-13.3
Volatile Organic Compounds emissions (cars)	(g/m^2) (VMs)	36	35	-0.6
Volatile Organic Compounds emissions (vans)	(g/m^2) (VMs)	64	61	-4.1
Total combined waste to landfill	(tonnes) (AS)	18,302	13,971	-23.7
Waste to landfill per vehicle produced	(kg/unit) (VMs)	8.8	7.1	-19.8
Vehicle use				
Average new car CO_2 emissions	(g/km) (AC)	144.2	138.1	-4.2

Carbon footprint through the life cycle

The 'use' phase is one of the most significant environmental, social and economic impacts in a vehicle's life cycle. These proportions are expected to change as alternative fuels and new technologies, such as hybrids and pure electric vehicles, penetrate the market further.

CO_2 emissions through the vehicle life cycle



Production includes:

- Manufacturing
- Logistics
- Energy for sales and support functions

Use includes:

- CO_2 from distance driven
- CO_2 from servicing and aftermarket functions

Recycling includes:

- CO_2 from managing end-of-life vehicles (ELVs)

Production **10%**

Recycling **5%**

Use **85%**

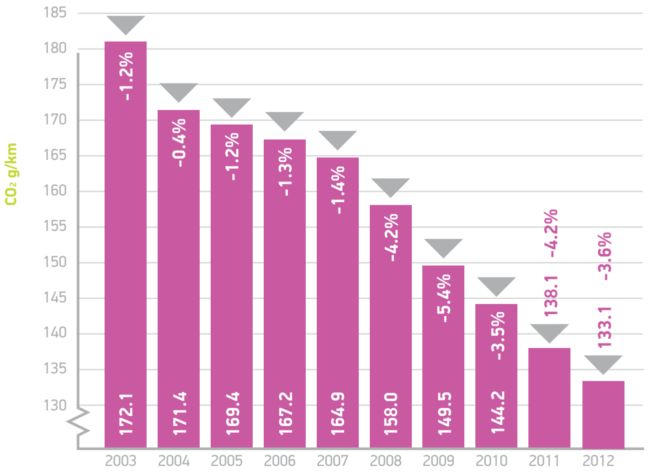
End-of-Life Vehicles (ELVs)

The UK automotive industry is not only committed to sustainable manufacturing, but also sustainability at the end of the product's life. The ELV Directive aims to reduce the amount of waste going to landfill from vehicles (cars and LCVs) when they are finally scrapped.

Vehicle manufacturers' recycling networks have achieved the 85% (by weight) recycling/recovery target imposed by the End-of-Life Vehicle Directive since its introduction in 2006. The automotive industry also supports the recycling industry's moves to develop new processes to meet the challenging 95% recycling/recovery target by 2015. 10% of this target can be met through energy recovery.

ENVIRONMENTAL PERFORMANCE

UK average new car CO_2 emissions



In 2009, a new EU regulation on emissions targets was passed which committed European vehicle manufacturers to cut average CO_2 emissions from new cars to 130g/km by 2015 and about 95g/km by 2020. The average CO_2 emissions of new cars sold in the UK in 2012 was 133.1g/km.

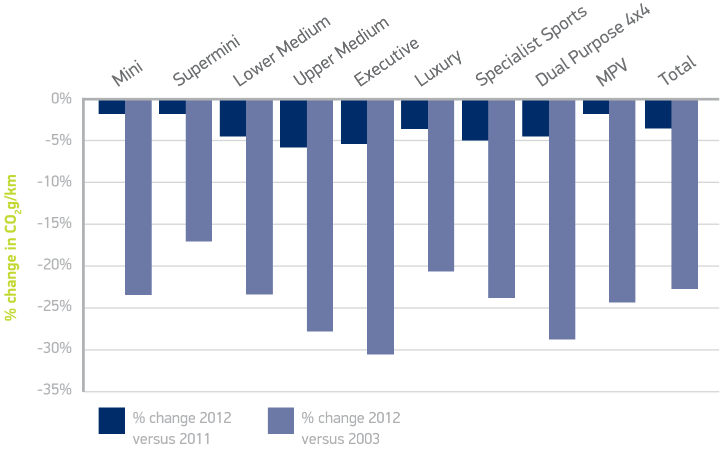
Helping motorists to save fuel

In addition to producing ever more efficient powertrains, manufacturers have designed various innovations to help drivers save fuel and lower CO_2 emissions.

- **Stop-start** technologies automatically cut the engine when a vehicle is stationary. The engine is re-started by releasing the brake or depressing the clutch.
- **Tyre pressure monitoring systems** measure the pressure of each of the tyres and will give a warning through the dashboard display if they become under-inflated.
- **Gear shift indicators** show the driver the optimum time to change gear (up and down) while driving.
- **Low rolling resistance tyres** are designed to improve the fuel efficiency of a vehicle by minimising the energy wasted when the tyre rolls down the road. The new industry tyre labelling scheme indicates fuel efficiency using a rating scale from A (most efficient) to G (least efficient). The difference between an A rating and a G rating could be a reduction in fuel consumption of up to 7.5%.

ENVIRONMENTAL PERFORMANCE

Change in average new car g/km CO_2 emissions by segment 2012 v 2011 and 2003



ENVIRONMENTAL PERFORMANCE

New car market by VED band

VED band	2012		Market share (%)		
	Volume	Average CO_2	2012	2011	2003
A (up to 100g/km)	175,056	95.8g/km	8.6%	3.4%	0.0%
B (101-110g/km)	227,869	107.4g/km	11.1%	10.6%	0.3%
C (111-120g/km)	357,840	116.7g/km	17.5%	17.0%	2.7%
D (121-130g/km)	371,300	127.1g/km	18.2%	14.9%	1.9%
E (131-140g/km)	352,397	136.3g/km	17.2%	18.4%	10.0%
F (141-150g/km)	194,570	146.5g/km	9.5%	10.5%	19.3%
G (151-165g/km)	164,492	157.3g/km	8.0%	11.9%	21.2%
H (166-175g/km)	59,145	170.7g/km	2.9%	3.8%	9.7%
I (176-185g/km)	40,491	180.5g/km	2.0%	3.7%	8.1%
J (186-200g/km)	48,475	192.8g/km	2.4%	2.7%	9.1%
K (201-225g/km)	18,755	213.6g/km	0.9%	1.2%	8.4%
L (226-255g/km)	25,279	235.9g/km	1.2%	1.5%	5.4%
M (over 255g/km)	8,940	307.6g/km	0.4%	0.6%	4.0%

For cars registered since 2001, Vehicle Excise Duty (VED or 'road tax') is based on tailpipe CO_2 emissions with the amount payable scaling with the level of emissions. For more detail on VED refer to page 49.

Electric car technology and policy in the UK

Electric Vehicle (EV) is the umbrella term for any vehicle that is powered, in part or in full, by a battery that can be directly plugged into mains electricity. The term EV includes Pure-Electric Vehicles, Plug-In Hybrid Vehicles and Extended-Range Electric Vehicles.

Pure-Electric Vehicles (Pure EVs) – These are wholly electric vehicles operated by a battery. Most Pure-Electric Vehicles have a range of about 100 miles.

Plug-In Hybrid Vehicles (PHEVs) – These are vehicles which have a battery range in excess of 10 miles, after which they revert to hybrid capability, using battery and Internal Combustion Engine (ICE) power for propulsion.

Extended-Range Electric Vehicles (E-REVs) – These vehicles are similar to pure EVs, but they have a shorter battery range of around 40 miles which is extended by an ICE on-board generator, providing additional mileage capability. Unlike PHVs, which can use electric or full hybrid for propulsion, E-REVs always use electricity for propulsion.

For the automotive industry to achieve and exceed emissions targets set by the EU, all technologies will play a part. Electric vehicles (EVs) represent one option in a range of technologies being developed by the motor industry.

The Plug-In Car Grant

In January 2011, the government announced that motorists would be entitled to 25% (up to £5,000) off the list price of an eligible car, through the Office for Low Emission Vehicles' (OLEV) Plug-In Car Grant. Cars with tailpipe emissions of 75g CO_2/km or less, including electric, plug-in hybrid and hydrogen models, are all potentially eligible for the subsidy. Full details are available on the OLEV website.

By the end of 2012, 3,021 claims had been made through the Plug-In Car Grant scheme, with SMMT data showing that 3,293 cars eligible for the Grant were registered over the same period.

The Plug-In Van Grant

In January 2012, government introduced a new Plug-In Van Grant that entitles motorists purchasing a qualifying ultra-low emission van to a grant of 20% to put towards the cost of the vehicle – up to £8,000.

The Plug-In Van Grant has been designed to help make the whole-life costs of a qualifying van more comparable with petrol or diesel equivalents.

More information about the scheme and eligible vehicles can be found on the OLEV website.

Ultra-low carbon innovation and the future of UK automotive

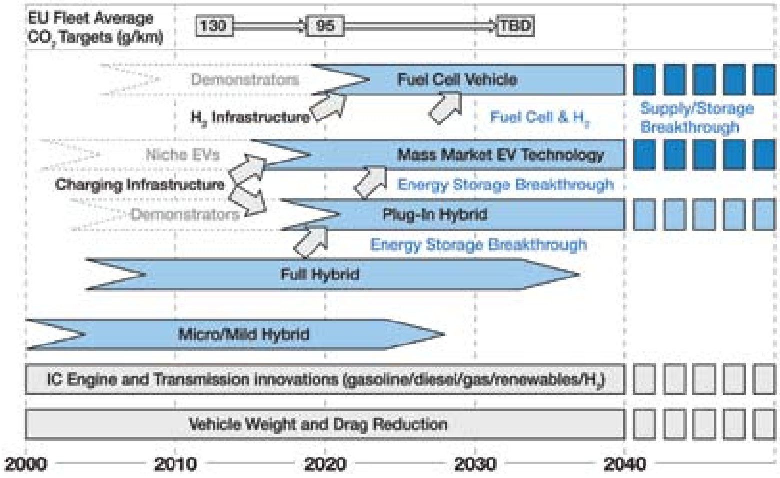
UK automotive is fast becoming a centre for low carbon vehicle research, development, design and manufacture and is well placed to lead the transition to a low carbon economy.

Delivering a low carbon economy

Vehicle manufacturers are investing heavily in R&D to develop innovative technologies that improve fuel efficiency, lower emissions and reduce the overall environmental impact of their products.

Collaboratively, the UK industry has developed consensus technology roadmaps for cars (see across) and commercial and off-highway vehicles which provide a strategic outlook for the industry, recognising the long-term challenges associated with the transition to ultra-low carbon vehicles.

The Automotive Council has also set out strategic investment priorities for the move to lower carbon technologies, identifying five strategic technology groups where the UK has the potential for a significant return on investment. The five strategic technologies are: **energy storage and management, electric motors and power electronics, internal combustion engines, lightweight vehicle and powertrain structures, and intelligent mobility.**



Source: Automotive Council

Vehicle security and road safety

Vehicle theft 2003-2012

Year	Theft of vehicles	% Change on year before	Theft from vehicles	% Change on year before
2003/04	280,288	-8.7%	603,256	-9.1%
2004/05	231,323	-17.5%	500,360	-17.1%
2005/06	203,239	-12.1%	507,239	1.4%
2006/07	182,464	-10.2%	502,651	-0.9%
2007/08	159,704	-12.5%	432,412	-14.0%
2008/09	137,508	-13.9%	396,976	-8.2%
2009/10	109,684	-20.2%	339,170	-14.6%
2010/11	99,208	-9.6%	313,467	-7.6%
2011/12	85,802	-13.5%	300,378	-4.2%

Source: Crime in England and Wales 2011/12

Number of dangerous driving offences on UK roads

Year	Number of dangerous driving offences	% Change on year before
2006/07	5,353	-9.6%
2007/08	4,725	-11.7%
2008/09	4,240	-10.3%
2009/10	3,941	-7.0%
2010/11	3,475	-11.8%
2011/12	3,238	-6.8%

Source: Crime in England and Wales 2011/12

Vehicle safety

The number of people killed or injured on UK roads increased in 2011 by 3% – the first increase since 2003.

According to the Department for Transport (DfT), the total number of casualties, including slight injuries, serious injuries and fatalities, in road accidents in the UK continued to fall in 2011, by 2%, from 208,648 in 2010 to 203,950 in 2011.

Reported road casualties 2007-2011

Year	All killed	All injured
2007	2,946	244,834
2008	2,538	228,367
2009	2,222	219,924
2010	1,850	206,798
2011	1,901	202,049
% Change 2001 - 2011	-44.9%	- 34.8%

Source: DfT Reported Road Casualties in Great Britain 2011 (published June 2012)

Fuel costs

Average annual fuel prices over 10 years

Year	Average fuel cost (p) and tax as % of total			
	Unleaded	% tax	Diesel	% tax
2003	76.0	75.6%	77.9	74.1%
2004	80.9	73.1%	82.5	72.0%
2005	87.2	68.9%	91.3	66.5%
2006	92.0	66.2%	65.7	64.2%
2007	95.0	66.3%	97.4	65.0%
2008	107.5	61.7%	118.1	57.5%
2009	99.9	67.5%	104.4	65.2%
2010	117.3	63.6%	119.8	62.7%
2011	133.9	56.8%	139.2	58.5%
2012	136.3	59.2%	142.5	57.4%

Source: The AA

Vehicle Excise Duty

Vehicle CO_2 emission bands

Band/g/km CO_2 emissions	Standard Rate (£)* 2013-2014	First Year Rate (£) 2013-2014
A (up to 100g/km)	0	0
B (101-110g/km)	20	0
C (111-120g/km)	30	0
D (121-130g/km)	100	0
E (131-140g/km)	120	120
F (141-150g/km)	135	135
G (151-165g/km)	170	170
H (166-175g/km)	195	275
I (176-185g/km)	215	325
J (186-200g/km)	250	460
K** (201-225g/km)	270	600
L (226-255g/km)	460	815
M (over 255g/km)	475	1,030

**Alternatively-fuelled cars get a £10 discount on all bands.*
***Cars over 225g/km registered between 01/03/01-23/03/06 in band K.* *Source: gov.uk*

Glossary of terms

Market segmentation

SMMT segmentation

A **Mini** eg Hyundai i10
B **Supermini** eg Ford Fiesta
C **Lower Medium** eg Volkswagen Golf
D **Upper Medium** eg BMW 3 Series
E **Executive** eg Mercedes-Benz C-Class
F **Luxury Saloon** eg Jaguar XJ
G **Specialist Sports** eg Audi TT
H **Dual Purpose** (4x4/SUV) eg Range Rover Evoque
I **Multi-Purpose Vehicle** eg Vauxhall Zafira

SMMT segments typically conform to the parameters below:

Segment A – Mini

- Less than 1.0l
- Bodystyle 'miniature'
- Two-door
- Length not exceeding 3,050mm

Segment B – Supermini

- Between 1.0 – 1.4l
- Bodystyle bigger than Mini
- Length not exceeding 3,745mm
- Performance greater than Mini
- More variety of trims per range

Segment C – Lower Medium

- Between 1.3 – 2.0l
- Length under 4,230mm (14 ft)

Segment D – Upper Medium

- Between 1.6 – 2.8l
- Length under 4,470mm

Segment E – Executive

- Between 2.0 - 3.5l
- Four-door bodystyle, generally bigger than upper medium
- Length under 4,800mm
- More luxuriously appointed

Segment F – Luxury Saloon

- Upward from 3.5l
- Most luxurious available

Segment G – Specialist Sports

- Sports coupé
- Sports saloons
- Traditional sports

Segment H – Dual Purpose (4x4/SUV)

- 4x4 off road

Segment I – Multi-Purpose Vehicle (MPV)

- 4x2 or 4x4 estates with a seating capacity of up to eight people

SMMT INFORMATION

SMMT publications and useful links

SMMT reports and publications

13th Annual Sustainability Report
www.smmt.co.uk/sustainability
(The next edition of the Annual Sustainability Report will be launched in July 2013)

Dealer Energy Efficiency Guide
www.smmt.co.uk/dealerenergyefficiency

Invest Now Report
www.smmt.co.uk/invest-now

New Car CO_2 Report 2013
www.smmt.co.uk/co2report

More information

AA (Automobile Association)
www.theaa.com

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

IMI (The Institute of the Motor Industry)
www.motor.org.uk

Industry Forum
www.industryforum.co.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

RHA (Road Haulage Association)
www.rha.uk.net

RMI (Retail Motor Industry Federation)
www.rmif.co.uk

RoadSafe
www.roadsafe.com

Semta
www.semta.org.uk

Produced for SMMT by AdStorm Marketing & Advertising: www.adstorm.co.uk

SMMT
DRIVING THE
MOTOR INDUSTRY

THE SOCIETY OF MOTOR MANUFACTURERS AND TRADERS LIMITED
71 Great Peter Street, London SW1P 2BN
Tel: +44 (0)20 7235 7000
Fax: +44 (0)20 7235 7112
E-mail: communications@smmt.co.uk
Twitter: @SMMT

www.smmt.co.uk