



UK AUTOMOTIVE SUSTAINABILITY REPORT

2025 DATA



“Automotive has known for generations that success depends on both ambition and an ability to adapt to challenges and, in some instances, crises. This report highlights how our industry is doing just that, ensuring Britain’s sustainable future is not a pipedream, but a mission well underway.”

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FOREWORD



Mike Hawes

Chief Executive

The Society of Motor Manufacturers and Traders (SMMT)

The transition to a net zero and fully circular economy remains one of the defining industrial transformations of our time. For the UK automotive sector, it is a challenge we have embraced with determination, investment and innovation. But 2025 showed more transparently than ever that delivering sustainability at pace requires more than ambition alone. In a year marked by significant economic and geopolitical uncertainty, the industry had to navigate global conflicts, trade disruption, volatile energy prices and shifting international policy – all of which created a more complex landscape.

Despite this, the sector's achievements were substantial. As this report sets out, huge investments were channelled into more sustainable production, with on-site factory renewable generation up more than a third. Manufacturers also increased the proportion of manufacturing waste being reused or recycled to more than 93%. Along with greener plants, we also have greener roads. Some 470,000 new battery electric cars were sold in the UK last year – with more than 160 different EV models on the market – saving hundreds of thousands more tonnes of CO₂ emissions.

It is not only the environment and consumers that benefit from automotive investment but the workforce too, with UK automotive apprenticeship and trainee numbers up almost a third – last year surpassing 6,000 roles to create brighter futures across the country.

These are just some examples of industry's outstanding contributions in the UK which, in a tough year, cannot be taken for granted. Nor can we forget government's pivotal role, working with SMMT and our members, as well as with other sectors and stakeholders, to try and deliver the conditions that automotive needs to thrive. We enjoyed a strong partnership, with the publication of the UK's long-awaited Industrial and Trade Strategies, the British Industrial Competitiveness Scheme, the launch and subsequent expansion of DRIVE35, the re-introduction of an EV grant, and landmark agreements on international trade – all of which signalled recognition of our sector's economic and strategic importance.

Such interventions provide a stronger platform for industry and government on which to build towards our shared ambitions. But fundamental challenges must still be addressed: high energy costs, unrealistic market regulation, the need for faster infrastructure rollout, supportive fiscal measures and a more resilient supply chain. SMMT will continue to work with government to advance our shared priorities which are firmly in the country's interest.

Automotive has known for generations that success depends on both ambition and an ability to adapt to challenges and, in some instances, crises. This report highlights how our industry is doing just that, ensuring Britain's sustainable future is not a pipedream, but a mission well underway. The report also makes clear that sustainability cannot be viewed in isolation: it is intrinsically linked to economic growth, industrial resilience and consumer confidence. Sustainability requires both government and industry, therefore, to work closely together. One must enable, the other must deliver.

It is a balancing act we must get right, else the UK's own capability to deliver its environmental, economic and social ambitions would be irreversibly weakened. The stakes are especially high for automotive businesses – they must decarbonise while continuing to provide crucial mobility, skilled jobs and national prosperity. These priorities must be handled with care, and as a promise to future generations.

2025 SUSTAINABILITY SUMMARY

2025: ENVIRONMENTAL



More than **470,000** zero emission cars sold, saving around **650,000 tonnes** of CO₂ (ICE equivalent)



Average new car tailpipe CO₂ emissions down **-5.7%**



80.4 GWh of on-site renewable generation, **up 36%**



Scope 1 & 2 energy use down **-9.4%**, CO₂ emissions down **-14.1%** (due to reduced, disrupted overall production)



Scope 1 & 2 energy per vehicle up **3.6%**, CO₂ per vehicle up **2.7%** (due to reduced, disrupted overall production)



Overall water use up **0.7%**, Water per vehicle up **19%** (due to reduced, disrupted overall production)

2025: SOCIAL



6,100 apprentices currently employed in the UK automotive industry, up **32.9%**



Proportion of women employees rises to **15.4%**



2.1 lost time incidents per **1000 employees**

2025: ECONOMIC



188,000 manufacturing jobs
dependent on the sector



Manufacturing turnover
£85bn, with **£18bn GVA**

2025 NEW

New car & commercial
vehicle registrations up
1.2% to 2.39mn



23.9% more new zero
emission cars registered, with
overall market share rising
to 23.4% (still behind ZEV
mandate targets)



36.2% more new zero
emission vans registered, but
market share continues to lag
behind ZEV mandate targets



Combined car & commercial
vehicle production down
-15.5%



SUMMARY: 2025 KEY PERFORMANCE INDICATORS (KPIs)

		Unit	1999	% Change 2025 on 1999	2024	2025	% Change 2025 on 2024
Environmental performance							
Production inputs							
AS	Total combined energy use (Scope 1&2)	(GWh)	7013	-63%	2,708	2,618	-9.5%
	Total CO ₂ equivalent (Scope 1&2)	(tonnes)	2,182,926	-80%	515,319	444,448	-10.2%
	Total green tariff	(GWh)	N/A	N/A	443	435	-1.6%
	Proportion electricity from green tariff	(%)	N/A	N/A	33.2%	36.5%	4.9pp
	Total on-site renewable generation	(GWh)	N/A	N/A	60.3	80.4	36.0%
	Proportion electricity from on-site renewable generation	(GWh)	N/A	N/A	4.53%	6.74%	2.5pp
	Grid equivalent cost saving from on-site renewable generation	(£ million)	N/A	N/A	16.8	19.6	23.7%
	Grid equivalent CO ₂ saving from on-site renewable generation	(tonnes)	N/A	N/A	12,494	14,070	36.0%
VM	Energy use per vehicle produced (Scope 1&2)	(MWh/unit)	3.9	-28%	2.58	2.84	3.6%
	CO ₂ equivalent per vehicle produced (Scope 1&2)	(tonnes/unit)	1.1	-57%	0.49	0.48	2.7%
AS	Total water use	(000m ³)	6,090,000	-51%	3,233,137	2,997,981	0.5%
VM	Water use per vehicle produced	(m ³ /unit)	5.3	-31%	3.07	3.69	18.6%
Material inputs							
AS	Proportion production waste to landfill	(%)	N/A	N/A	0.8%	1.1%	0.5
	Proportion production waste incinerated	(%)	N/A	N/A	1.4%	1.3%	-0.2
	Proportion production waste reused & recycled	(%)	N/A	N/A	91.0%	93.1%	1.9
	Proportion production waste recovered (for energy)	(%)	N/A	N/A	6.9%	4.5%	-2.1
Vehicle use							
AC	Average new car CO ₂ tailpipe emissions	(g/km)	N/A	N/A	102.1	91.8	-10.1%
	Average new non-ZEV CO ₂ tailpipe emissions	(g/km)	N/A	N/A	126.9	119.8	-5.7%
	New zero emission car registrations	No.	N/A	N/A	382,000	473,348	23.9%
	Proportion new zero emission cars registered	(%)	N/A	N/A	19.6%	23.4%	3.1 pp
AV	New zero emission van registrations (<4.25T)	No.	N/A	N/A	22,200	30,169	36.2%
	Proportion new zero emission vans registered (<4.25T)	(%)	N/A	N/A	6.30%	9.60%	3.0 pp
NAEI	Total NO ₂ exhaust emissions (vehicle parc)	(kt)	1162.3	N/A	179.0	163.6	-8.6%
	Total Particulate (PM2.5/10) exhaust emissions (vehicle parc)	(kt)	48.78	N/A	3.7	3.2	-13.4%
Social performance							
WI	Jobs dependent on the sector**	No.	907,000	-12%	796,000	830,000	4.3%
	Total apprenticeships & trainees	No.	N/A	N/A	N/A	6102	32.9%
AS	Lost time incidents per 1000 employees	No.	13.4	-84%	1.09	2.09	15.8%
	Share of women employed	(%)	N/A	N/A	14.7%	15.4%	0.2pp
Economic performance							
WI	Automotive manufacturing sector turnover**	(£ billion)	47.9	77%	91.5	85	-8%
	Automotive manufacturing gross value added (GVA)**	(£ billion)	N/A	N/A	25	18	-28%
	Total vehicles produced (cars, LCVs, HGVs, buses, coaches)	No.	1,984,909	-61%	905,233	765,715	-15.5%
	Total new vehicle registrations (cars, LCVs, HGVs, buses, coaches)	No.	2,429,084	-2%	2,357,990	2,385,705	1.2%

Key:

(WI) whole industry data
 (AC) all car registrations in the UK
 (AV) all van registrations in the UK
 (AS) all signatories
 (VMs) vehicle manufacturers
 (LCV) light commercial vehicles
 (HGV) heavy commercial vehicle
 (SC) supply chain manufacturers
 (NAEI) National Atmospheric Emissions Inventory data

* The 2024 data has been re-baselined to ensure consistency and enable year-on-year comparisons. Changes to previously published data reflect changes to signatories and updated methodologies.

** Sector turnover, GVA, R&D and jobs dependent on the sector are compiled from several official sources using expert SMMT analysis.

*** Estimate of manufacturing, distribution, refuelling and repair of vehicles where automotive is the main activity of the firms.

All per vehicle figures also contain resources used during engine and battery production, some of which are destined for export.

Production – the complete vehicles as they leave the production line in a UK facility.

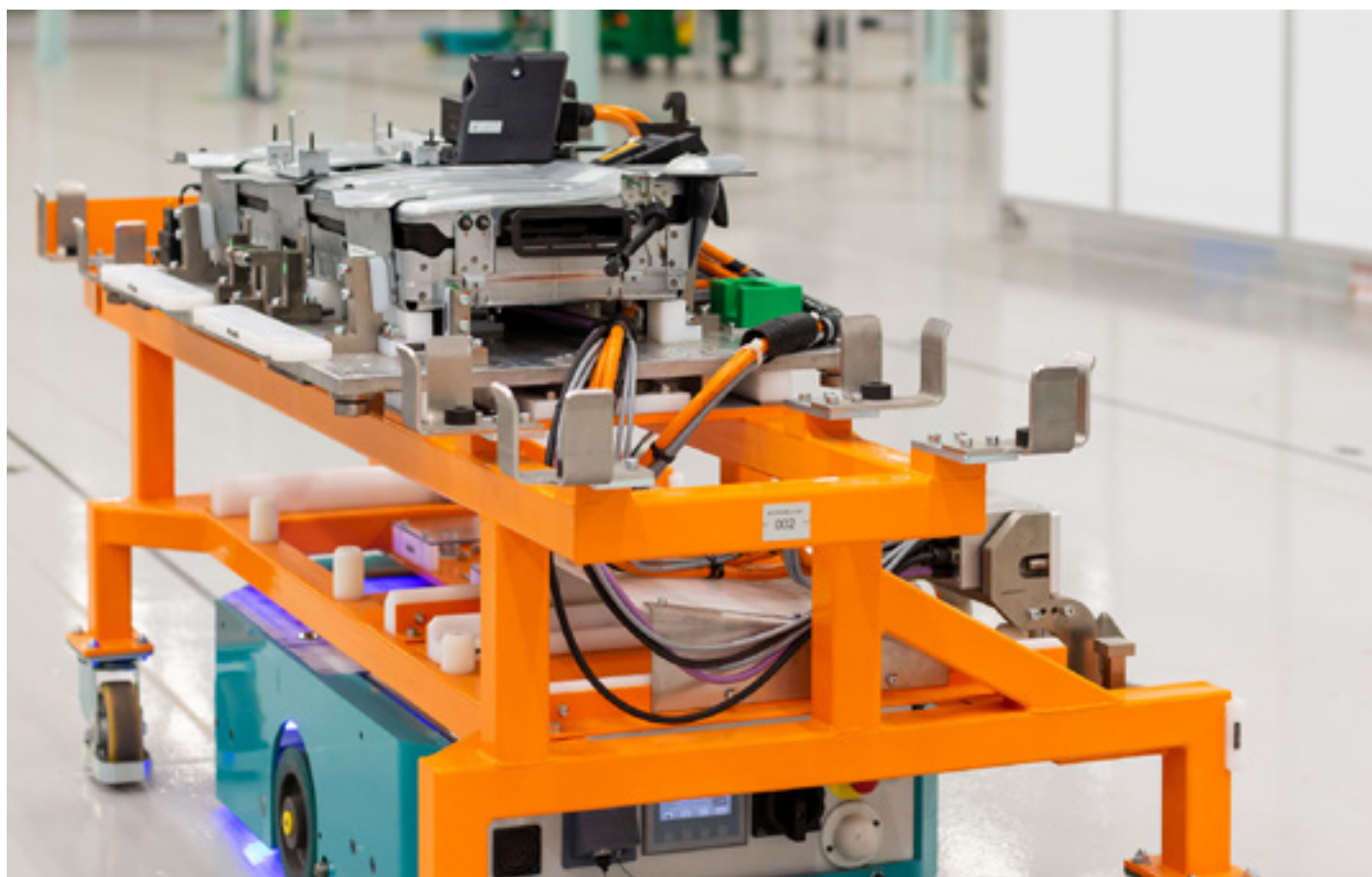
Registrations – vehicles registered for road use in the UK for the first time with the DVLA or the DVLA's equivalent organisation in Northern Ireland, Channel Island's or Isle of Man.

Turnover – the money/income that a business generates each year.

Gross value added – the contribution to the economy of an individual producer, industry or sector.

CO₂ – calculated using UK Government GHG Conversion Factors for Company Reporting methodology.

Energy costs – calculated according to DESNZ published international comparisons.

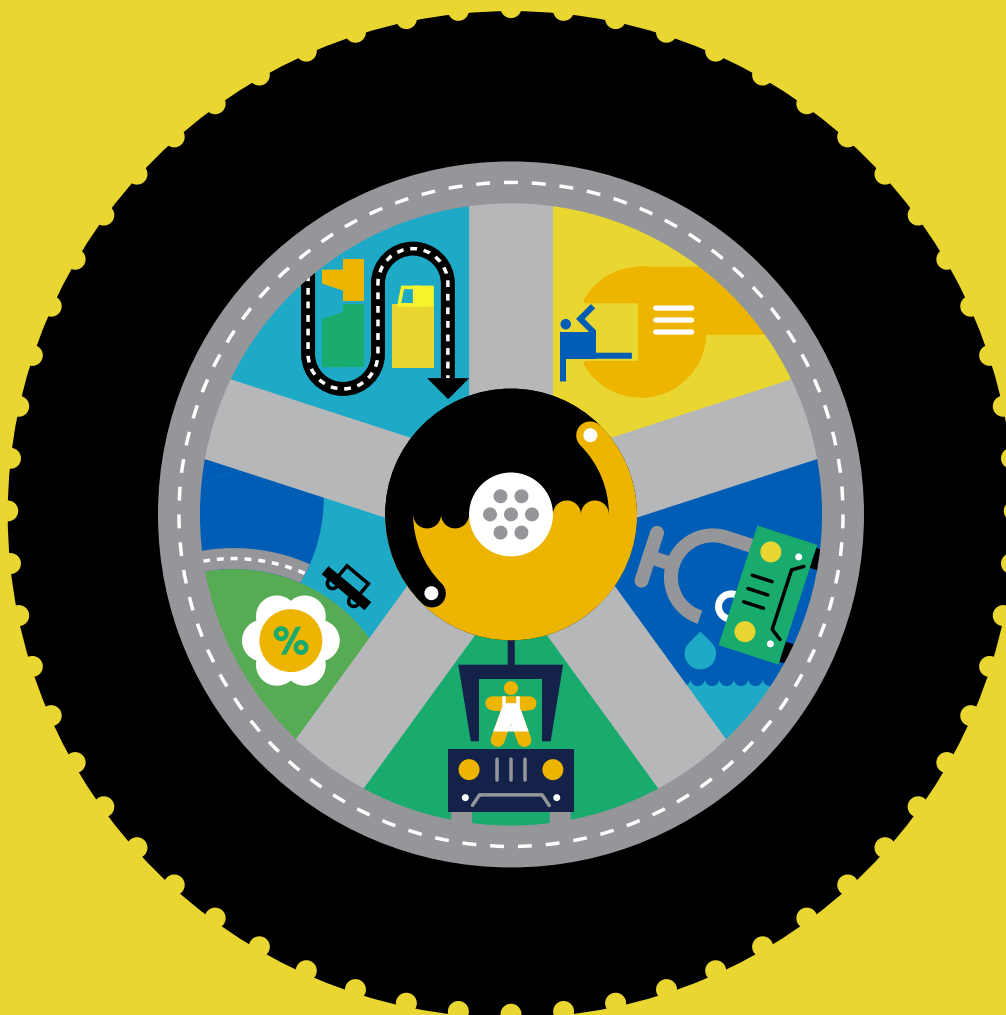


2025: A YEAR IN REVIEW

SUSTAINABILITY DATA IN CONTEXT

2025 was a year of political, economic and regulatory turbulence for UK Automotive. Global conflict, volatile energy prices, disrupted trade and unpredictable US policy intensified cost pressures already affecting businesses and consumers. The start of President Trump's second term brought a marked shift in US climate policy, including a declared "energy emergency"¹, criticism of green energy policy² and moves to withdraw from the Paris Climate Agreement.³ At home, climate scepticism became more vocal in parts of politics and media, often framed around the cost of decarbonisation.

UK Government nevertheless reaffirmed its net zero commitment, submitting an updated Nationally Determined Contribution to the UN in January to cut greenhouse gas emissions by at least 81% by 2035 against 1990 levels, in line with the 6th Carbon Budget. Industry welcomed the commitment and recognition that road transport decarbonisation is central to UK climate goals but continued to stress that world-leading ambition must be matched by world-leading support: incentives, infrastructure, affordable energy, and joined-up regulation and fiscal policy.



2025 marked the second year of the Vehicle Emissions Trading Scheme, with mandated zero emission vehicle registration targets rising to 28% for cars and 16% for vans in 2025. These targets remained ahead of natural customer demand, increasing manufacturer pressure and compliance costs. Government expanded and extended some regulatory flexibilities, while confirming the end of new pure ICE car sales in 2030 and all non-zero emission cars and vans by 2035. The flexibilities were welcomed by automotive but did not address the core challenge: the market was not growing quickly enough to meet rising targets.

Manufacturers therefore continued to subsidise ZEV demand through heavy discounting, a growing and unsustainable cost that weakened the UK investment case. Wider pressures intensified, including higher employer National Insurance Contributions. UK and EU policy also continued to diverge. The EU sought to simplify sustainability reporting and support industrial competitiveness through the Sustainability Omnibus Package, Clean Industrial Deal and Affordable Energy Package, while the UK's future sustainability reporting framework remained less clear. Industry continued to call for aligned global reporting requirements that avoid duplication across markets.

Global instability also affected trade and investment. New US import taxes of 27.5% on imported vehicles created a major threat before a UK-US trade deal in June reduced tariffs on UK-built vehicles to 10%. The EU's moves towards "Made in Europe" criteria in support packages further highlighted the risks of regulatory and market misalignment. In March, Stellantis confirmed the closure of the historic Vauxhall van factory in Luton, consolidating operations at Ellesmere Port.

There were important positives. In June, Government launched a 10-year Modern Industrial Strategy and new Trade Strategy, recognising automotive as pivotal to advanced manufacturing and setting a target for 1.3 million UK-built vehicles by 2035. It also launched DRIVE35, allocating £2.5 billion in capital and R&D funding over the next decade for low-carbon transport systems, batteries and electric powertrains, later increased to £4 billion at the Autumn Budget.

The Electric Car Grant, launched in July, provided £650 million to offer eligible consumers grants of £1,500 or £3,750 off certain new zero emission cars. Together with the Industrial and Trade Strategies, DRIVE35 and the UK-US deal, this gave the sector grounds for greater optimism. However, the gap between ZEV targets and demand kept widening. September saw a record 72,779 new battery electric car registrations, but this was achieved through significant discounting and lifted the year-to-date ZEV share only to 22.1%, short of the 28% target.

Manufacturing was then hit by a cyber incident at Jaguar Land Rover in September, halting production at the UK's largest automotive employer for almost six weeks, costing hundreds of millions of pounds and impacting supplier liquidity. The Cyber Monitoring Centre described it as "the most economically damaging cyber event to hit the UK", affecting more than 5,000 UK organisations with an estimated £1.9 billion impact. The incident, combined with tariff disruption and consolidation, contributed to a 15.5% fall in UK vehicle production.

The Autumn Budget provided further reassurance, with an additional £1.5 billion for DRIVE35, £1.3 billion for the Electric Car Grant, £200 million for EV charging rollout, and deferral of regulation that would have ended critical employee car ownership schemes. Government also consulted on the British Industrial Competitiveness Scheme to reduce manufacturers' energy costs and published the UK Critical Minerals Strategy to support growth, the clean energy transition and greater circularity.

Despite these interventions, full-year SMMT data showed ZEV sales short of annual targets. BEVs accounted for 23.4% of new car sales against a 28% target, and 9.5% of van sales against a 16% target, with many manufacturers relying on flexibilities for compliance. The issue was not industry commitment, but the gap between regulated ambition and market reality. The UK remained unique in imposing legally binding annual ZEV targets on manufacturers, backed by punitive penalties, while divergence from the larger EU market added complexity.

By year end, the EU had reached provisional agreement on a legally binding 90% cut in net greenhouse gas emissions by 2040, broadly aligning with the UK's 7th Carbon Budget trajectory. Its Automotive Package also recognised rapid ZEV market pressures, committing to review CO₂ standards, consider additional flexibility and propose measures to decarbonise corporate vehicles. From 2035, carmakers would comply with a 90% tailpipe CO₂ reduction target, with the remaining 10% offset through low carbon steel Made in the Union, e-fuels or biofuels – contrasting with the UK's current 100% target.

Overall, 2025 showed both UK Automotive's commitment to decarbonisation and the challenge of delivering it competitively. Government support on industrial strategy, trade, incentives, energy costs and critical minerals was welcome and significant. But sustainability progress cannot be separated from competitiveness, investment conditions or consumer affordability. To deliver net zero, grow the domestic ZEV market and maintain UK manufacturing strength, policy must align ambition with demand, infrastructure, affordable energy and international market realities.

- 1 <https://www.forbes.com/sites/gauravsharma/2025/01/20/drill-baby-drill-donald-trump-declares-us-energy-emergency/>
- 2 <https://economictimes.indiatimes.com/news/international/global-trends/green-new-scram-trump-calls-green-energy-a-hoax-says-energy-should-make-money-not-lose-it/articleshow/126999088.cms>
- 3 <https://www.theguardian.com/us-news/2026/jan/27/trump-withdraws-paris-climate-agreement>



ENVIRONMENTAL PERFORMANCE

Overall vehicle manufacturing output fell in 2025 for the second year in a row, as manufacturers continued to invest in reorientating their factories and technologies towards achieving net zero emissions and delivering zero emission vehicles. While this downturn reflected some planned, longer term investment decisions by the industry, unplanned and unwelcome disruption caused by a major cyber incident and ongoing global conflict exacerbated this trend, with lower volumes leading to inefficiencies in energy and water use in 2025.

Previous research by SMMT has demonstrated the benefits of maintaining and growing vehicle production volume in the UK, both for the economy and for decarbonisation.⁴ A larger, more vibrant ZEV market driven by high-volume demand benefits every part of the mobility ecosystem, from chargepoint operators and electricity suppliers, to the insurance and service, repair and maintenance sectors. It may not be immediately obvious, but the health of many sectors within the wider ecosystem is dependent on ZEV market volumes – which depend on a strong overall market. This creates a virtuous circle that continues to drive up ZEV volumes and accelerates the transition.

VEHICLE MANUFACTURING

ENERGY USE & CO₂ EMISSIONS – SCOPE 1&2

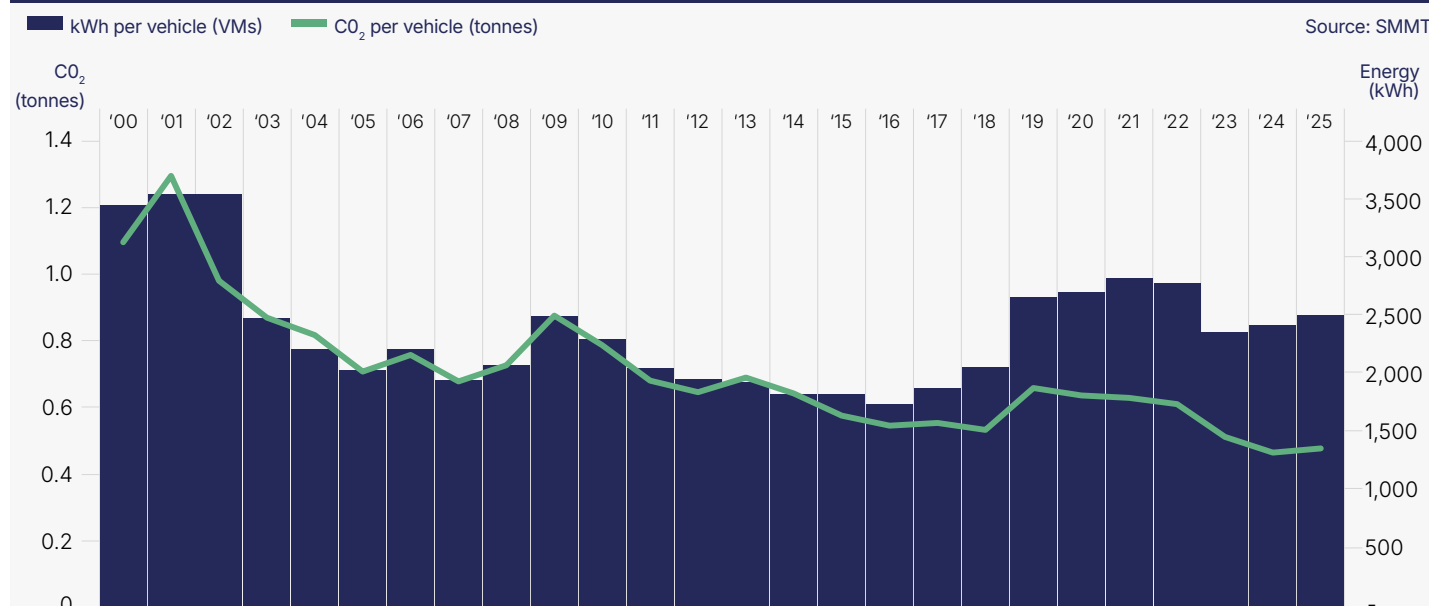
Significant, year-on-year² investment in renewable generation at automotive sites since 2015 has reduced the carbon intensity of manufacturing vehicles, despite the rising overall energy intensity of manufacturing increasingly complex, high-tech and electrified vehicles. While this has been a welcome longer term trend, inefficiencies related to the significant reduction in overall manufacturing volume in 2025 mean that the carbon intensity of vehicles rose slightly compared with the previous year.

However, the increase in energy intensity of vehicles produced has been mitigated by ever-increasing investment by manufacturers in greener and renewable forms of energy. This has delivered a 36% increase in renewable generation at UK manufacturing sites – meaning that scope 1 & 2 CO₂ per vehicle has risen by only 2.7%, compared with the 3.6% increase in equivalent scope 1 & 2 energy per vehicle.

Investment in on-site renewable electricity generation has clearly played a vital role in reducing the relative carbon intensity of vehicle manufacturing in recent years. However, despite welcome progress, such renewable generation accounted for less than 7% of overall electricity used by automotive manufacturers in 2025, with continued reliance on electricity sourced from the national grid. Therefore, much focus remains on the UK Government's decision to aim for grid decarbonisation by 2030 and the need to deliver this alongside a reduction in electricity costs.⁵

- 4 SMMT: In It Together: Why Every Sector Wins With Volume Growth, March 2025
5 SMMT: Powering The Automotive Industry: Electricity Grid Requirements For UK Automotive, June 2025

CHART 01 ENERGY AND CO₂ (SCOPE 1&2) PER VEHICLE MANUFACTURED



CASE STUDY: ASTON MARTIN

More sustainable transport for inbound logistics



In 2025, DHL Supply Chain converted Aston Martin's UK inbound logistics operation to a fossil-free diesel fleet, supporting both organisations' commitments to reducing transport emissions. The move follows the installation of a Hydrotreated Vegetable Oil (HVO) fuel tank at Wellesbourne, enabling 18 existing trucks to operate on the drop-in alternative fuel. 54,857 litres of HVO have been used by the Aston Martin fleet since the tank was installed, reducing emissions by 148 tonnes of CO₂e compared with diesel.

The use of HVO is expected to increase significantly in 2026, with projected consumption of 260,000 litres, and a further saving of 663 tonnes of CO₂e. In addition, the fleet includes 16 bio-LNG (liquid natural gas) trucks, which reduces CO₂e emissions by up to 80% versus diesel, alongside five electric vans that provide zero emission deliveries.

ON-SITE RENEWABLE ENERGY

Renewable energy generation and supply are a critical part of automotive manufacturers' journeys towards net zero. In 2025, vehicle manufacturers and their suppliers generated 80.4 GWh of renewable energy generation, up 36% compared with the previous year.

CASE STUDY: JLR

Large-scale solar installations to help power global operations



The 26-hectare, 18MW facility will supply up to 31% of the site's energy requirements, marking the completion of the first of three of its UK solar energy projects. Alongside the development, JLR also advanced its biodiversity efforts by planting native wildflowers beneath and between the ground-mounted panels and restoring hedgerows with bird and pollinator-friendly species, targeting a biodiversity uplift well above mandated levels.

Meanwhile, a newly expanded rooftop installation at the company's Electric Propulsion Manufacturing Centre (EPMC) in Wolverhampton features more than 18,000 solar panels, making it the largest automotive manufacturing rooftop solar array in the UK. Building on an existing rooftop array, the new 10.7MW system will generate approximately 9,512 MWh of electricity annually – enough to power over 3,500 homes for a year. The combined solar capacity will meet nearly 40% of the site's energy needs, supporting the production of electric drive units and batteries for its next generation vehicles.

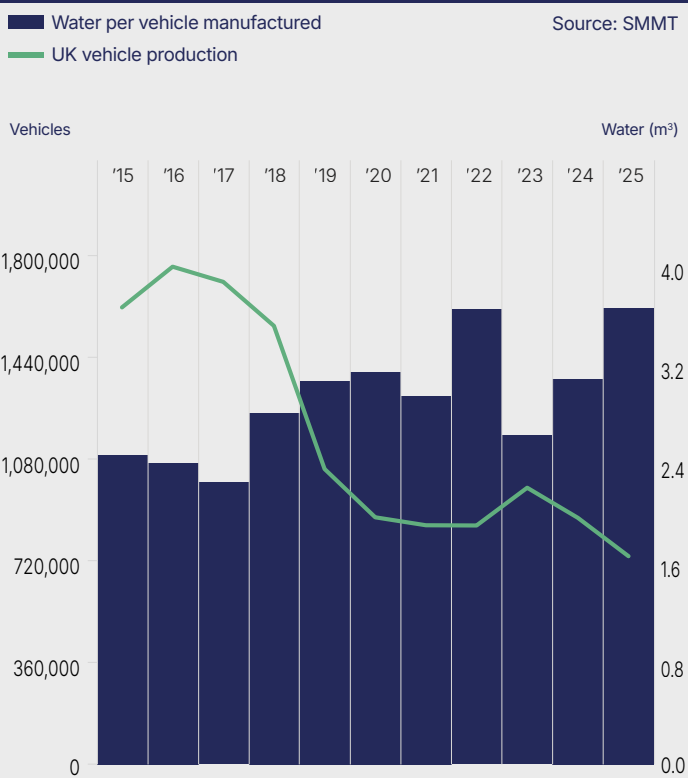
The car manufacturer is aiming to source at least one-third of its global energy needs from onsite and near-site renewables as alternatives to natural gas by 2030 – cutting emissions, enhancing energy resilience, and mitigating exposure to market volatility through self-reliance. To date, JLR has already achieved a 32.1% reduction in operational emissions compared with its FY19/20 location-based baseline through energy switching and efficiency measures. This is ahead of the required SBTi trajectory to be aligned to a 1.5°C pathway.

WATER USE

As highlighted in previous SMMT Sustainability Reports, the long-term trend shows an increase in water use per vehicle, reflecting the more intensive manufacturing processes associated with the production and refinement of increasingly complex and tech-laden modern vehicles.

The longer term trend also demonstrates the intimate inverse relationship between overall manufacturing volume and water efficiency. In 2025, this trend continued with fewer vehicles manufactured leading to inefficiencies in overall water use compared with the previous year.

CHART 02 WATER PER VEHICLE MANUFACTURED



CASE STUDY: McLAREN

Innovative carbon fibre manufacturing that cuts waste

With the introduction of its innovative Automated Rapid Tape (ART) carbon manufacturing technique in 2025, McLaren Automotive has put sustainability at the heart of carbon fibre production. While reducing material waste by 85.7% compared with conventional production methods, ART technology also delivers significant improvements in the quality and consistency of components.

McLaren has been a pioneer of this carbon fibre ever since it was first used in the construction of the race team's revolutionary McLaren MP4/1 Formula One in 1981. In the 45 years since, the company has become an industry-leader in carbon fibre technologies, which has led to the creation of ART carbon.

Developed in-house at the McLaren Composites Technology Centre in South Yorkshire, this cutting-edge process uses a highly advanced, aerospace-



inspired tape deposition process that results in a reduction of waste material that would otherwise be discarded during the production process. Alongside the sustainability benefits, the resulting carbon fibre is lighter, stronger, and of even higher quality.

As a result, more than 95% of the raw tape material is used during the production process, while the incredibly accurate automated manufacturing techniques almost completely eliminate parts rejection and extra waste.

Furthermore, McLaren has introduced a low energy curing process for carbon fibre components that uses up to 95% less energy compared with traditional methods.

Already used for components in the McLaren W1 supercar, ART carbon technology now unlocks even greater potential for future products. Crucially, it also offers the possibility of transforming the sustainable use of carbon fibre in engineering applications far beyond the automotive industry.

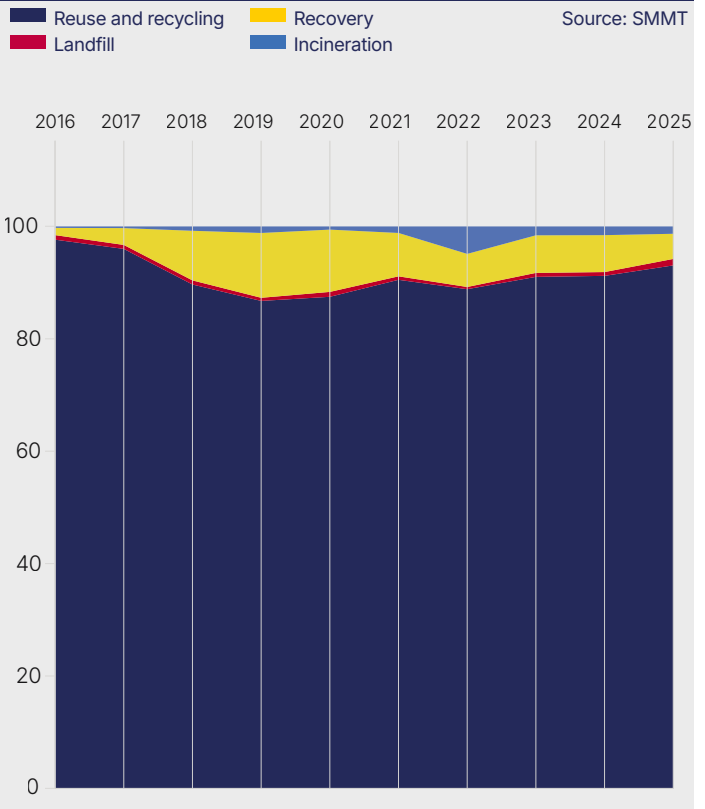
WASTE

As a proportion of overall residual material generated by automotive manufacturing, less than 1% has been sent directly to landfill each year since 2016, with annual levels remaining below this threshold.

Zero waste to landfill is the ultimate aim for the automotive industry and many manufacturers have achieved this already. While recycling remains a critical factor for automotive manufacturers, the longer term trend also shows their continued efforts towards a circular economy and the growing importance of recovery and reuse of materials.

Government's forthcoming Circular Economy Growth Plan and accompanying Transport Roadmap is an opportunity to embed circular economy principles and, in partnership with industry, position the UK as a market leader in automotive circularity. Embedding circular economy principles will maximise opportunities for continuous value retention across vehicle and battery lifecycles, supporting the development of replenishing battery systems, helping to retain critical minerals within the UK, and targeting strategic government support towards priority areas – such as recovery, reuse, repair, remanufacturing and high-value recycling.

CHART 03 DESTINATION OF MANUFACTURING WASTE



CASE STUDY: JLR

Industry-first commitment to tyres made from renewable materials

JLR was the first in the industry to introduce newly developed tyres containing more than 70% renewable and recycled materials such as silica from rice husks and plant-based resins, at scale.

Combining materials with reduced environmental impact without compromise on quality and performance standards, the new tyres are now available as standard on select New Range Rover models where a 22" wheel is specified, ahead of a wider roll-out across its other brands.

Developed with tyre manufacturer Pirelli specifically for JLR, the new P Zero tyre contains silica, used to enhance wet performance in tyres, sourced from rice husks, a natural by-product of rice milling. Fossil-based polymers and resins, used to help optimise the balance between dry and wet performance, have been replaced with plant-based

alternatives such as agricultural by-products or used cooking oils.

The tyres also contain recycled materials, reducing reliance on primary source material to help alleviate resource consumption. Carbon black, a crucial filler in rubber compounds used to improve stability, strength, and durability, is recovered from end-of-life tyres and recycled steel is used to enhance handling and stability.

Bio-based and recycled materials are generally more sustainable to obtain, more energy efficient to process, and easier to manage at end-of-life than virgin and fossil-based materials such as synthetic polymers and silica obtained from conventional materials such as quartz sand, yet perform as well, combining environmental responsibility and high-performance design.



VEHICLE EMISSIONS AND AIR QUALITY

ZERO EMISSION VEHICLES (ZEVs) AND TAILPIPE CO₂ EMISSIONS

Improvements to engine efficiency and an increasing proportion of zero emission and hybrid technologies meant the average tailpipe CO₂ from cars reduced by -10.1% in 2025, compared with the previous year. More than 470,000 battery electric cars were registered in 2025, saving around 650,000 tonnes of tailpipe CO₂ (ICE equivalent). An increase in the proportion of hybrids (up 7.2%) and plug-in hybrids (up 34.7%) provided further emissions reductions across the fleet.

New ZEV registrations rose 23.9% in 2025, taking an overall 23.4% share of the new car market. While this demonstrates the continued commitment of automotive manufacturers – with over 160 battery electric models available, often at significantly discounted prices – this progress still lagged behind the 28% ZEV mandate target. Battery electric van registrations rose 36.2% in 2025. However, again, their market share also fell well short of the 16% ZEV mandate target, despite very significant discounting by manufacturers and more than half of all models being available as a ZEV.

SMMT's most recent market outlook suggests the new car market will continue to track well below ZEV mandate targets in the coming years, with a gap of around six percentage points. For vans, meanwhile, the already sizeable gap – a ZEV share less than half the targeted level – is set to increase even further.

SMMT's 2026 report *Same Destination, Smarter Route* sets out the case as to why UK Government must carry out a holistic review of the ZEV regulatory and market ecosystem as a matter of urgency.⁶ In doing so, the report highlights the degree to which the myriad assumptions related to ZEV market development – as set out in the original VETS regulatory impact assessment in 2021 – have failed to materialise. Failed assumptions include battery costs that are 30% higher than expected, energy costs that are 80% higher than expected, and natural demand for EVs far behind government's original ambition. In this context, SMMT continues to call on government to carry out a holistic review of the whole ZEV ecosystem and transition.

CHART 04 AVERAGE NEW CAR CO₂ AND % CHANGE

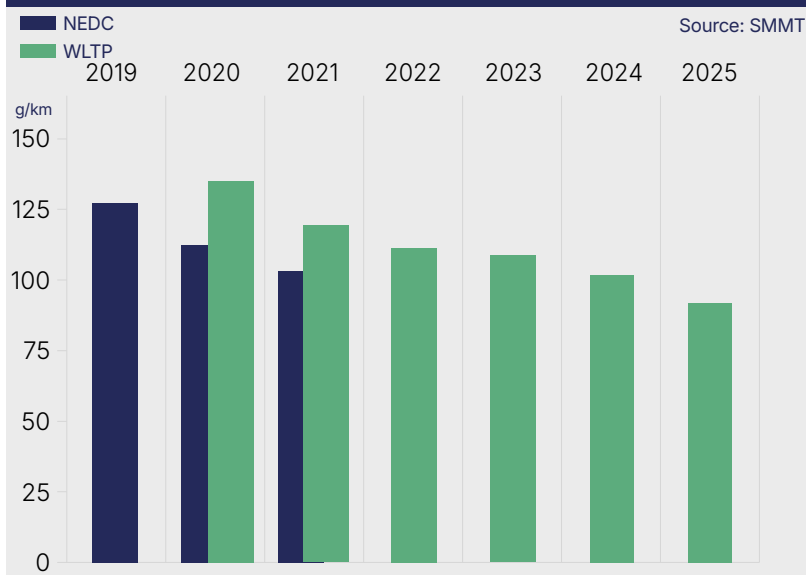


CHART 05 UK NEW CAR MARKET - ZEVS

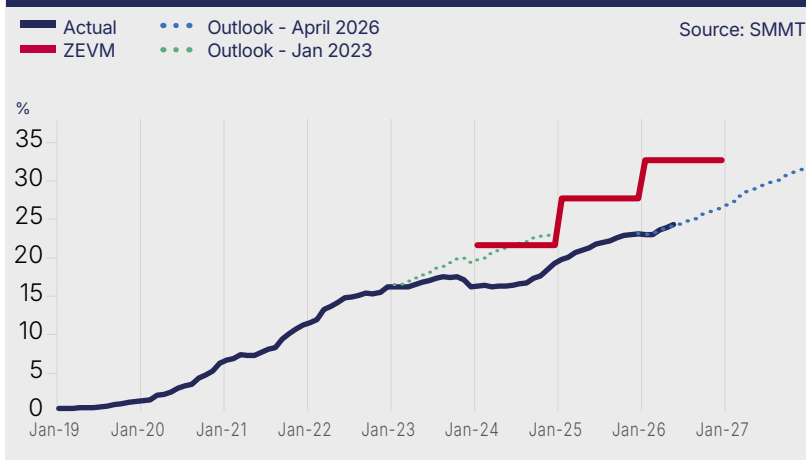
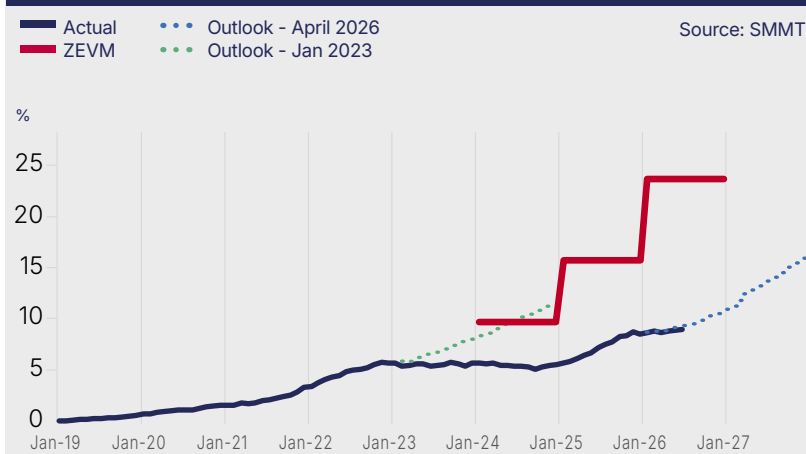


CHART 06 UK NEW LCV MARKET - ZEVS



6 SMMT, *Same Destination, Smarter Route*, March 2026

AIR QUALITY

There has been a clear, long-term trend of significant reductions of NO₂, PM10 and PM2.5 exhaust emissions across every vehicle section, reflecting significant efforts by the automotive industry to reduce the environmental impact of its engines and fuels. This trend continued in the most recent year for which data is available from the National Atmospheric Emissions Inventory (NAEI),⁷ with NO₂ exhaust emissions falling a further -9% in 2024 compared with the previous year, and down -81% since 1999. Particulate (PM10 and PM2.5) exhaust emissions fell -13% in 2024 compared with the previous year, down -93% since 1999.

7 <https://naei.energysecurity.gov.uk/air-pollutants/air-pollutant-emissions-data>

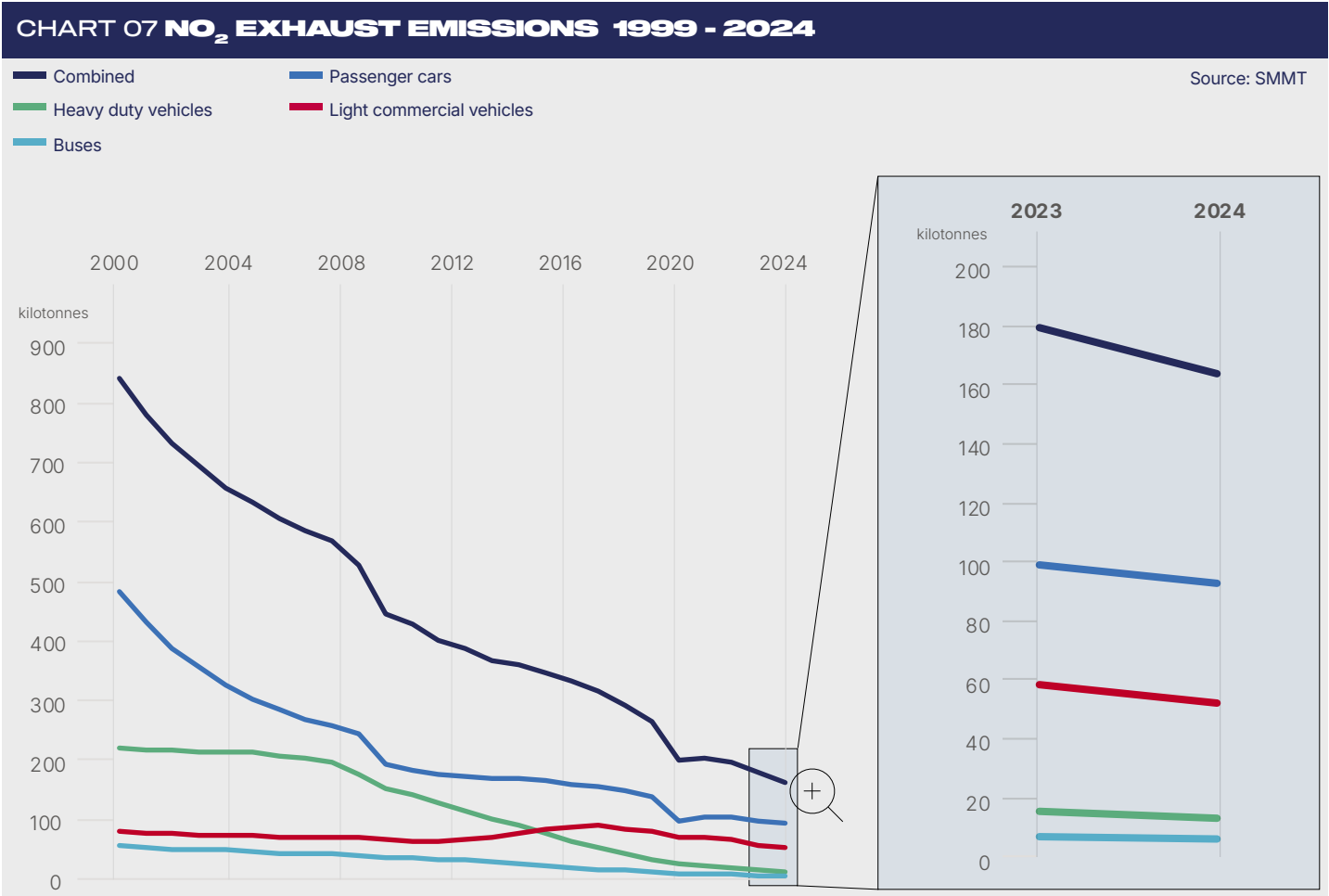
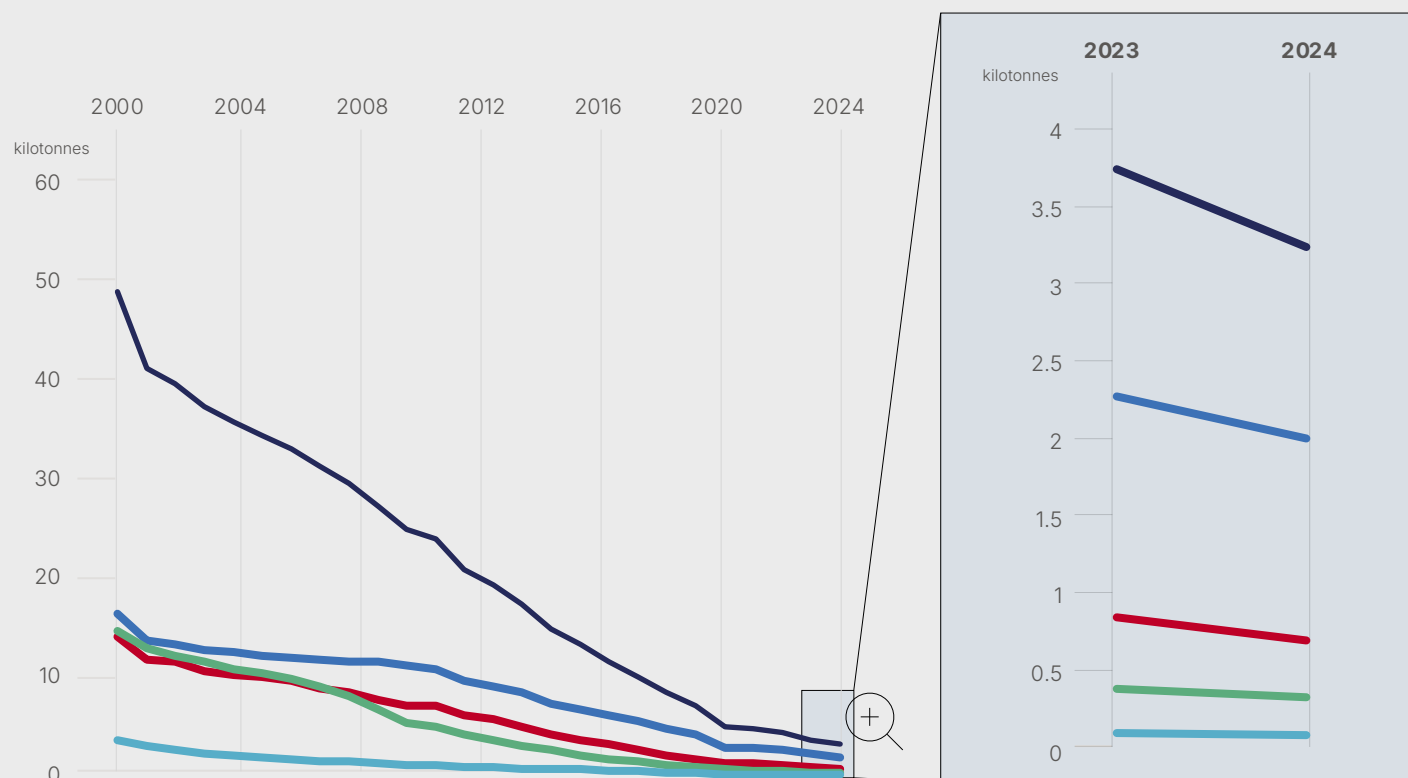



CHART 08 PARTICULATE (PM_{2.5} & PM₁₀) EXHAUST EMISSIONS 1999 - 2024

■ Combined
 ■ Heavy duty vehicles
 ■ Buses
 ■ Passenger cars
 ■ Light commercial vehicles

Source: SMMT





SOCIAL PERFORMANCE

Attracting talented people from all backgrounds, from career starters to career changers and returners, will be essential for the automotive sector to thrive in the next 10 years.

The industry is already working alongside government to deliver the Industrial Strategy ambition for a strong skills pipeline, supported by Skills England and the new Growth and Skills Levy. Ensuring access to flexible, high-quality and verified training for businesses of all sizes – particularly SMEs – across every region will be essential for delivering the high-skilled, agile and resilient workforce Britain needs to remain globally competitive.

APPRENTICESHIPS

A recent survey by SMMT⁸ found that more than 6,100 apprentices were employed in the UK automotive industry across 2025, with the number of apprentices in the sector rising by 33% on 2024. Of these, 28% (1,699) represented new apprenticeship starts.⁹

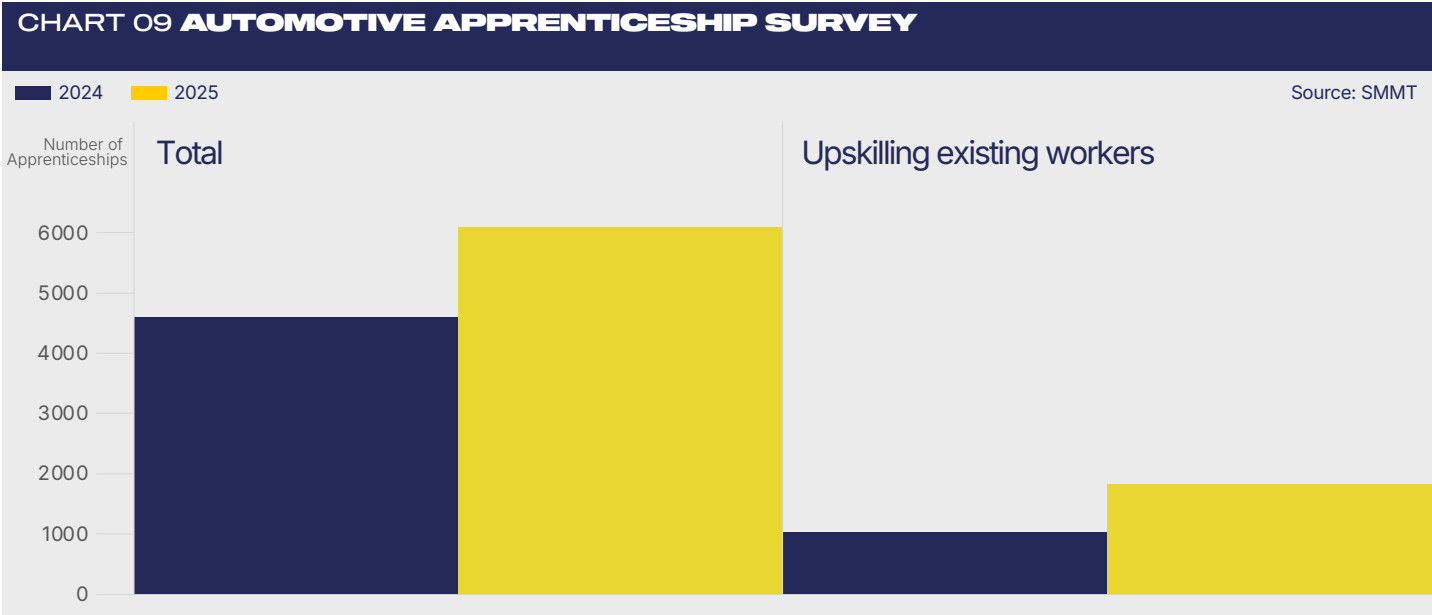
Of the 6,100 automotive apprenticeships actively undertaken in 2025, 30% (1,824) were provided to upskill existing workers in their current roles. In this context, SMMT's survey found that by 2035 almost two-thirds (61%) of existing roles across the sector are expected to have new skills requirements such as high-voltage system capability, battery handling, and digital skills including coding, data analysis and AI expertise.

The high level of investment in automotive apprenticeships demonstrates the sector's commitment to bringing in new talent and building careers through lifelong learning and development. However, the trend of automotive employers utilising pockets of their levy funds is expected to reduce drastically in 2026, following the decision by government to remove public funding for Level 7 apprentices over the age of 21. Almost half (44%) of respondents to SMMT's survey indicated that they would halt Level 7 training following the defunding plans, while many others were not yet sure if their businesses could absorb the new cost.

While the automotive sector is firmly supportive of policy interventions to support individuals not in employment, education or training (NEET), the decision to defund Level 7 apprenticeships and place an almost singular focus on entry level skills will not help foster the advanced skills that advanced manufacturing needs in increasing volumes to be a global leader in critical technologies. The omission of higher skills funding places UK factories at a clear disadvantage compared with European and global counterparts.

Elsewhere, the establishment of apprentice units could see a new avenue for training, learning and development in significant volumes, if the delivery of new units meets business demand. These apprenticeship units represent a first step in government delivering long-promised flexibility in how businesses can use their apprenticeship levy funds to provide workforce training and recruitment. However, with unit training currently set at Levels 2 and 3, future units must be targeted at higher level skills.

8 SMMT Survey of major vehicle and component manufacturers, R&D specialists and aftermarket firms – together employing 75% of the UK automotive manufacturing workforce – carried out in January 2026.
 9 <https://www.smmt.co.uk/uk-auto-apprenticeships-surge-as-sector-builds-next-gen-workforce/>



DIVERSITY, EQUITY AND INCLUSION

The automotive industry is acutely aware of the compelling business case for implementing a more flexible, equitable and inclusive working environment that recognises diversity and attracts a wider range of people. Diversity, equity and inclusion are strategic necessities for a sector that is undergoing rapid transformation and transition towards a zero emission, circular and increasingly digital and data-led future. In this context, businesses cannot afford to inadvertently develop cultures, activities or processes that may restrict access to any part of the talent pool from which they draw their skills and experience.

Huge progress has been made across the board over the years, but the sensitive nature of DEI data means that it is difficult to extract and robustly present. In one area where good data is available, SMMT's latest report shows the 15% share of women employed across the automotive sector as a whole. While continuing to rise gradually each year, it is a reminder of the need for continued progress in this area.

CASE STUDY: BENTLEY

Brighter futures for adult apprentices and T-Level students

In 2025, Bentley launched its Adult Apprenticeships Programme for 55 of its employees (53 in manufacturing) aged between 20 and 60, enabled by a new 10-person team that backfills production while training is taking place. The cohort included specialisms such as electrical, polymer injection moulding, upholstery, LEAN management methodologies and production support.

Bentley also partnered with Crewe Engineering and Design University Technical College (UTC) to select seven T-Level students for nine weeks' placement learning over two years. These placements began in 2026. The introduction of T Levels is a new and exciting chapter for Bentley and is the latest development in its longstanding relationship with the UTC, which was co-founded by Bentley.



CASE STUDY: VOLKSWAGEN GROUP UK

Apprenticeships drive next-generation automotive talent

During National Apprenticeship Week in February 2025, Volkswagen Group UK launched a number of new head office apprenticeship roles.

Volkswagen Group UK has around 1,000 apprentices in training at any one time, across its Service Technician, Customer Service and Paint and Body courses. Learners are employed by one of its 600 retail sites, with training and development completed in blocks in the network as well as at the National Learning Centre in Milton Keynes.

In 2025, Volkswagen Group UK expanded opportunities for those wanting to break into the sector, offering level 3, 4 and 5 apprenticeships at its head office in Milton Keynes. These roles cover Data, IT, Business and Finance.



CASE STUDY: ASTON MARTIN

Supporting the Armed Forces community to grow and thrive

Aston Martin is proud to recognise the contributions and sacrifices of its service personnel and their families. In April, the company reinforced its commitment by signing the Armed Forces Covenant – a public pledge to support the Armed Forces community, including veterans, reservists, spouses, partners and cadet instructors. The Covenant is a promise to ensure fairness and respect for those who serve or have served in the Armed Forces, as well as their families. By signing, we're strengthening our commitment to:

- Supporting Armed Forces community members in the workplace
- Welcoming applications from veterans, reservists, military spouses/partners and cadet instructors
- Providing dedicated internal support through the company's Armed Forces Employee Resource Group
- Honouring key moments like Armistice Day to recognise service and sacrifice

I AM Armed Forces – part of the Aston Martin Inclusion Network – plays a key role in creating an inclusive environment where service leavers and military families feel supported and valued. Since launching last year, the network has brought together colleagues from across the business – including those with military experience and those who want to show their support.



CASE STUDY: NISSAN

Delivering outstanding corporate social responsibility for the LGBTQ+ community

Nissan was presented with the 'Outstanding Corporate Social Responsibility Award' at the 2025 Metro Pride Awards in London for its exceptional efforts in supporting the LGBTQ+ community.

Nissan was recognised for its dedication to Corporate Social Responsibility (CSR) activities, particularly the Possibilities Project, which encapsulates multiple initiatives that foster inclusivity, equality and opportunity for individuals from all walks of life. It was nominated for the shortlist by members of the public and then chosen to win the accolade by a panel of expert judges.

Established in 2021, the Nissan Possibilities Project is Nissan's long-term CSR programme that promotes Diversity, Equity and Inclusion, with a key focus on supporting the LGBTQ+ community by demonstrating tangible support through internal and external initiatives. Many of these were highlighted in Dare to Defy, a three-part Prime Video docuseries launched in December 2024 that focuses on breaking down barriers within sport for underrepresented communities. Dare to Defy is now available in 28 countries.



CASE STUDY: STELLANTIS

Instant access to British Sign Language Interpreters in partnership with Convo

Stellantis has partnered with Convo to provide British Sign Language (BSL) interpreters via a QR code at nearly 850 retailers across the UK covering



the Vauxhall, Peugeot, Citroën, Fiat, Jeep, Leapmotor, Abarth, Alfa Romeo and DS Automobiles brands. The QR code allows almost instant access to a BSL interpreter for BSL users.

The Convo high speed video platform connects deaf customers to qualified BSL interpreters. Once the customer scans the QR code, an interpreter appears within moments on their phone. The customer signs to the interpreter, who relays the conversation verbally to the salesperson, enabling natural, real time communication without the need for advance booking of interpreters.

For many deaf BSL users, visiting a car retailer can be a complicated and overwhelming experience, especially when discussing finance options, test drives or aftersales support. Traditionally, customers have had to pre-book interpreters in advance or rely on family members to translate often leading to delays, miscommunication, and a lack of independence. By introducing on-demand BSL interpretation, Stellantis aims to remove these barriers entirely and create a truly inclusive experience at its retailers.

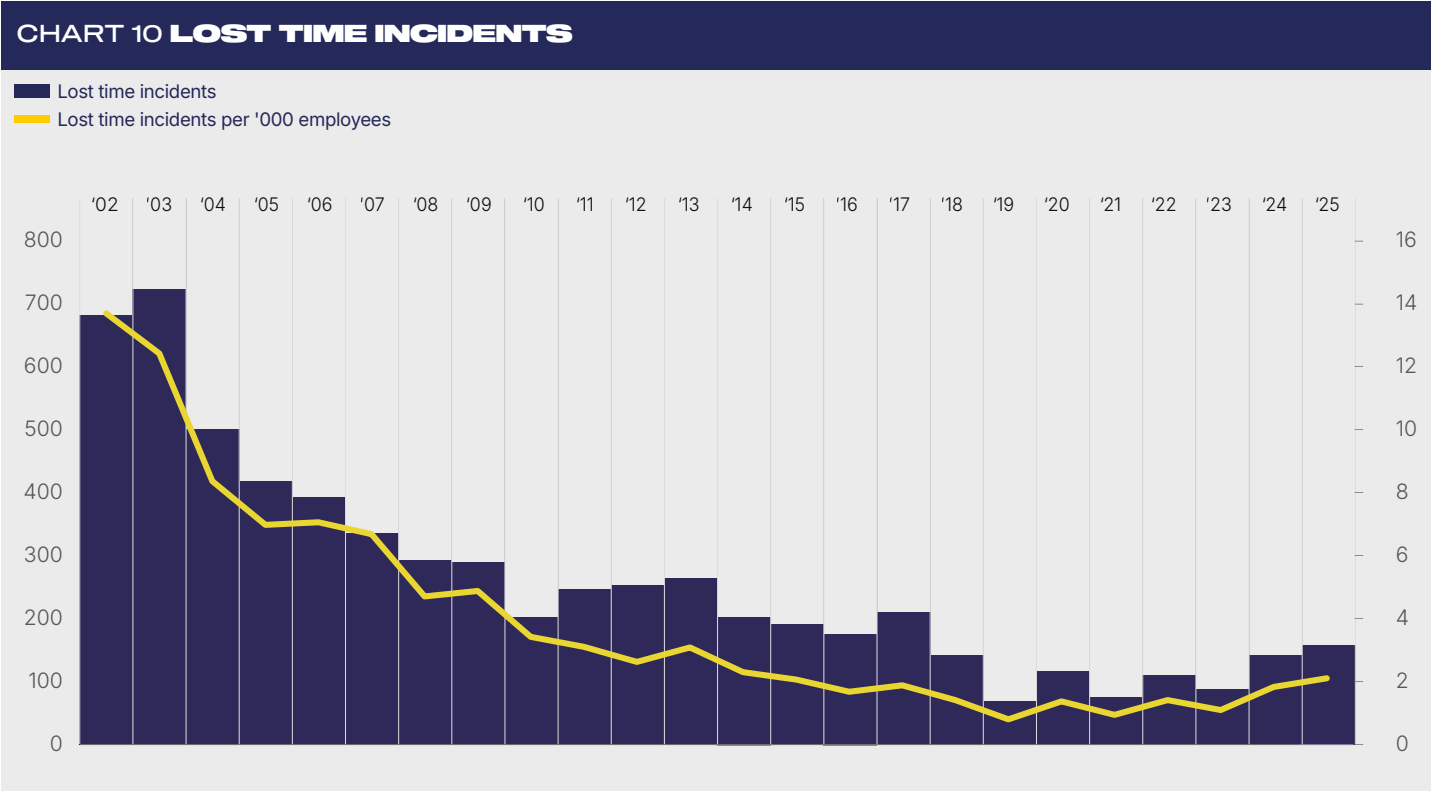
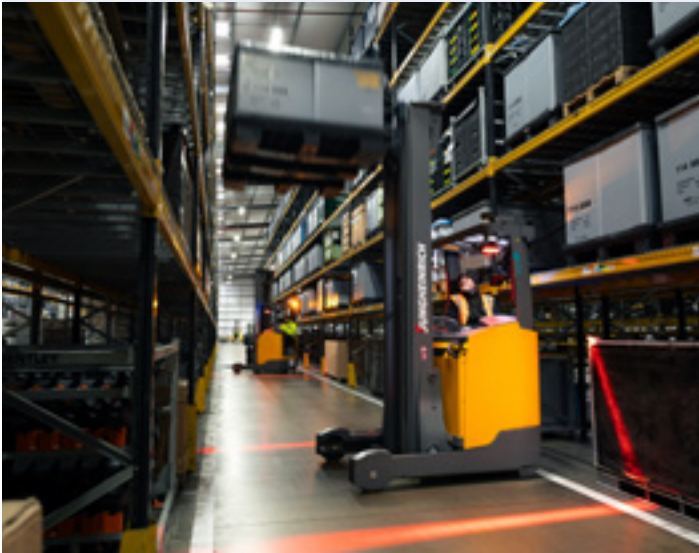
HEALTH AND SAFETY

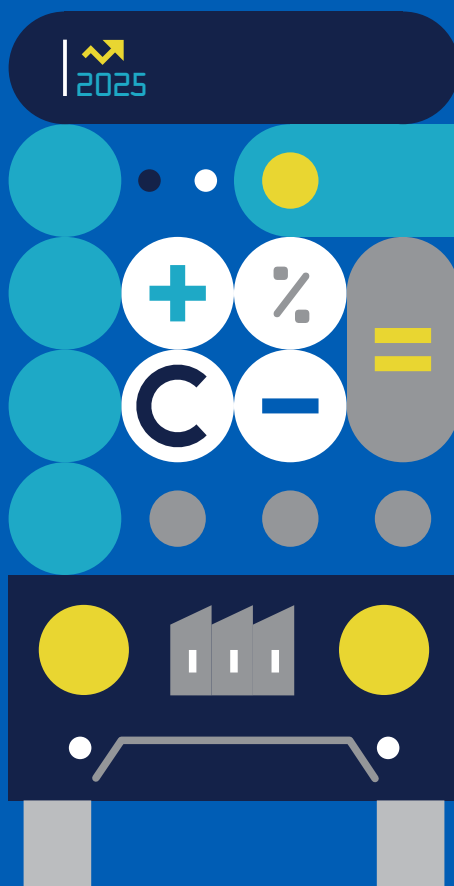
Health and safety is a top priority for the automotive industry, and all manufacturers continue to strive for zero lost time incidents. Since 1999, the industry has achieved a significant -84% reduction in the rate of lost time incidents per employee. While the number of these incidents was up slightly in 2025 – as it was also in 2024 – this is against an extremely low baseline. The figure of just 2.1 lost time incidents per 1,000 employees continues to reflect an industry that takes pride in the health and well-being of its workforce.

CASE STUDY: BENTLEY

Electrifying robotics equipment for material handling

In 2025, Bentley completed the transition of its logistics Material Handling Equipment fleet to lithium-ion battery units, replacing lead-acid technology across its entire 160-strong fleet. This upgrade has delivered longer battery life, cut electricity consumption, and enhanced safety through pedestrian awareness technology that uses cameras and wearable bands to trigger automatic truck slowdown near untrained personnel and visitors. Bentley's original fleet will be repurposed by the provider for a second life.





ECONOMIC PERFORMANCE

The automotive industry is a vital part of the UK economy, integral to growth, the delivery of net zero and the UK's position as a global trade hub. It contributes £85 billion turnover and £18 billion value added to the UK economy, and in 2025 invested £5 billion in R&D, with 188,000 people employed directly in manufacturing and 830,000 in total across the wider automotive industry. Many of these automotive manufacturing jobs are outside London and the South-East, with wages 23.5% higher than the UK average. The sector accounts for 11.2% of UK manufactured goods exports (10% of total goods exports) and ships vehicles to more than 140 countries, generating approximately £111 billion in total automotive trade (imports and exports).

The UK manufactures almost every type of vehicle, from cars, to vans, taxis, trucks, buses and coaches, as well as specialist and off-highway vehicles, supported by more than 2,500 component providers and some of the world's most skilled engineers. In addition, the sector has vibrant aftermarket and remanufacturing industries. The automotive industry also supports jobs in other key sectors, including advertising, chemicals, finance, logistics and steel.

- 10 Commercial vehicle' covers vans, trucks, taxis, buses and coaches.
 11 Based on independent production outlook produced by AutoAnalysis in November 2025 – cars and light vans only.
 12 <https://www.smmf.co.uk/strongest-new-bus-and-coach-market-since-2008-as-zero-emission-uptake-surges/>

PRODUCTION AND EXPORTS

UK vehicle production fell -15.5% in 2025 as factories turned out a total of 764,715 units. Of these, 717,371 were cars and 47,344 were commercial vehicles, with output falling by -8.0% and -62.3% respectively.¹⁰ 2025 volumes were constrained by a number of factors, including a cyber incident stopping production at Britain's biggest automotive employer; new tariffs on trade across the Atlantic; the consolidation of two CV plants into one; and ongoing restructuring as plants shift to a decarbonised future.

Production of battery electric (BEV), plug-in hybrid (PHEV) and hybrid (HEV) cars rose by 8.3% to a combined 298,813 units – a record 41.7% share of output. With the start of next-generation volume electric car production in Sunderland, and the planned launch of seven new ZEV models across the UK, output is expected to grow in 2026.

The latest independent production outlook expects overall UK car production to return to growth with output set to rise by 13.5% to over 750,000 units in 2026. Overall light vehicle production is anticipated to reach over 770,000 units – with the potential to reach one million units by 2030 provided new model launches stay on track and the right investment conditions are set.¹¹

77.5% of UK manufactured cars (555,826 units) were exported. Of these, the EU received the majority (56.7%), followed by the US (15.0%) and China (6.3%). Exports to each were down, by -3.3%, -18.3% and -12.5% respectively – with shipments to the US impacted by tariff uncertainty earlier in 2025. Turkey and Japan rounded off the UK's top five global export markets, followed by Canada, Australia, South Korea, Switzerland and UAE.

UK registrations of new buses, coaches and minibuses bucked the trend of reduced overall production seen in other vehicle sections in 2025, growing 10.4% to reach 9,259 units, delivering the best performance for the market in 17 years.¹² Growth for the year was driven by single and double-decker deliveries, up 24.9% and 25.5% to 2,465 and 2,010 units respectively.

CHART 11 UK VEHICLE PRODUCTION AND CAR BEV/HYBRID SHARE

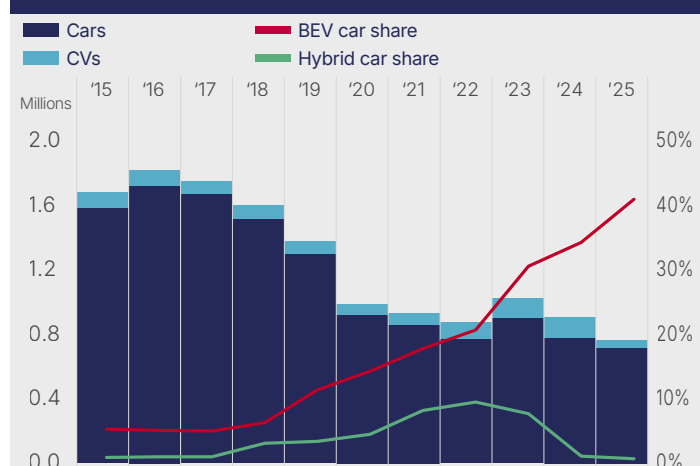
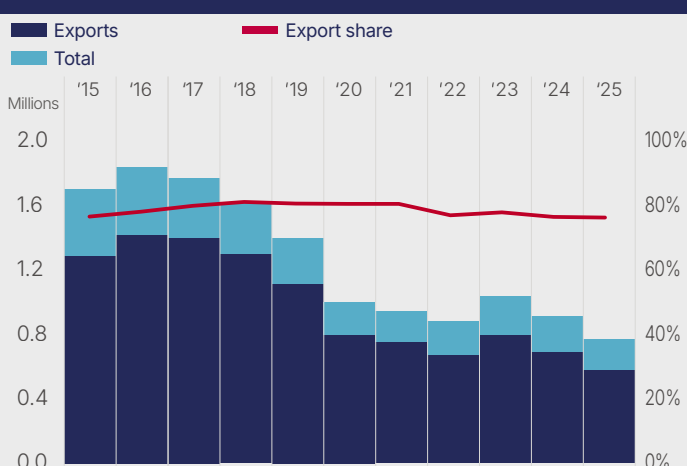


CHART 12 UK VEHICLE PRODUCTION AND EXPORT SHARE



UK MANUFACTURED VEHICLE MODELS BY LOCATION

Manufacturer	Model range	Location	2024	2025	% change
Nissan	Juke, LEAF, Qashqai	Sunderland	282,124	273,322	-3.1%
Jaguar Land Rover	F-Type, F-Pace, XE, XF, Discovery Sport, Range Rover Evoque, Range Rover, Range Rover Sport, Range Rover Velar	Castle Bromwich / Halewood / Solihull	257,110	201,283	-21.7%
MINI	MINI, MINI Clubman	Oxford	110,742	124,271	12.2%
Toyota*	Corolla, Swace	Burnaston-Derby	100,009	92,136	-7.9%
Stellantis**	Vauxhall Combo-e, Peugeot e-Partner, Citroën e-Berlingo	Ellesmere Port / Luton	105,450	31,048	-70.6%
Leyland Trucks	DAF CF, LF, XF	Leyland	14,205	15,141	6.6%
Bentley	Bentayga, Continental, Flying Spur	Crewe	10,770	9,943	-7.7%
Others †			24,823	17,751	-29.2%
All makes			905,233	764,715	-15.5%

* includes Suzuki vehicles manufactured at Toyota Burnaston, ** includes Vauxhall, Citroën, Fiat, Opel, Peugeot

† includes Alexander Dennis, Aston Martin, Caterham, Dennis Eagle, LEVC, Lotus, McLaren, Morgan, Rolls Royce, Switch Mobility and Wrightbus

CASE STUDY: NISSAN

A vision for sustainable mass production and logistics

In late 2025, the third generation Nissan LEAF glided silently off a transformed Sunderland Plant production line as the company brought to life its EV36Zero plan. Building the new LEAF in the UK represents an investment of £450 million by Nissan across its operations and supply chain and marks the return of the car that pioneered mass EV production more than a decade ago.

The landscape around the plant has also been transformed with a brand-new AESC gigafactory just over the road. AESC will supply next-generation battery technology with increased energy density to deliver superior range and performance for the new LEAF.

LEAF has been built in Sunderland since 2013, with 282,704 manufactured in total at the plant. The first new LEAF off the line was a two-tone Luminous Teal Evolve grade equipped with a 75kW battery which offers a range of up to 386 miles (WLTP). The new LEAF also supports

150kW DC fast charging, adding up to 273 miles in just 30 minutes.

Engineers at Nissan Technical Centre Europe (NTCE) in Cranfield, Bedfordshire played a defining role in shaping the design, technology and driving character of the LEAF, with the majority of their innovations carried through to UK, Japanese and US models. The team at Sunderland Plant will follow with a new all-electric Nissan JUKE next year, with both models built on the plant's production Line Two. It means that Nissan Sunderland now produces vehicles from fully electric to hybrid, including Nissan's e-POWER technology on Qashqai and JUKE HEV, as well as ICE.

Nissan also flicked the switch on a new era of sustainable freight logistics at its Sunderland Plant. At the heart of the transformation is a £1.4 million high-power charging station for electric heavy goods vehicles (eHGVs) – the first of its kind in the UK. The brand-



new eHGV hub is not just a set of chargers – it is the engine developing an electric, end-to-end supply chain and a major milestone in Nissan's EV36Zero vision to transform the plant into a flagship EV hub.

The initiative brings together Nissan, Fergusons, Yusen and BCA in a collaborative effort driven by GRIDSERVE and funded by the UK Government through Innovate UK's Electric Freightway programme. The new depot features seven charging stations with the capacity to charge 10 eHGVs at once – delivering up to 360kW per vehicle. The result is a fleet of 25 all-electric trucks capable of clocking over 2.4 million kilometres per year while slashing carbon emissions by 1,500 tonnes.

NEW VEHICLE MARKETS BY SECTOR

CARS

The UK new car market grew for the third year in a row in 2025, breaching the two million mark for the first time since the pandemic, with 2,020,520 new car registrations. This figure included almost half a million (473,348) new battery electric vehicles (BEVs) – more than in the whole of 2021 and 2022 combined – meaning BEV market share rose to 23.4%. Elsewhere, hybrid electric vehicle (HEV) volumes rose by 7.2% in 2025 to achieve a 13.9% market share, while plug-in hybrids were the fastest growing powertrain, with volumes increasing 34.7% to take 11.1% of registrations.

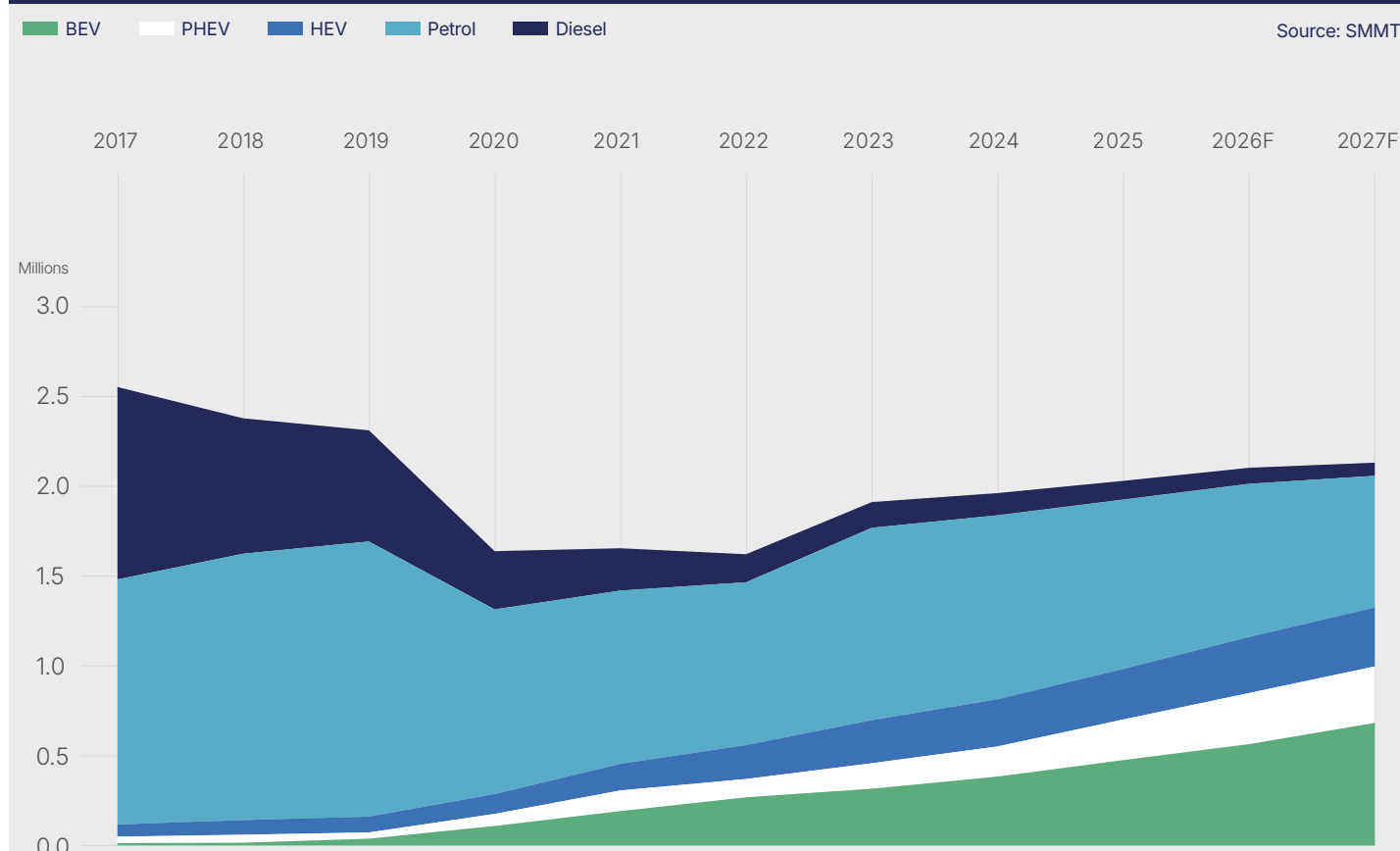
While the 2025 BEV registration figures represented a strong year-on-year uplift – a result of massive automotive investment – it was not enough to match the 28% ZEV mandate target, meaning manufacturers relied on flexibilities and substantial discounting to achieve compliance.¹³ By the end of 2025, customers had a choice of more than 160 BEV models, up from just over 130 at the start of 2025, and with at least 70 more models due in 2026.

The long-awaited return of a grant for ZEV purchase has helped, although only around a quarter of models are currently eligible for the incentive at any level. It is manufacturers, therefore, that continue to shoulder the burden of driving up demand, subsidising their sale by more than £5 billion in 2025.¹⁴ Such subsidies are clearly unsustainable. Furthermore, the announcement of a new 'eVED', the proposed pence per mile tax on ZEVs and PHEVs purchased from 2028 sends a confusing message to consumers, undermining rather than encouraging market confidence.

¹³ 2024 BEV share 19.6% vs mandate target of 22% – difference of 2.4pp. 2025 BEV share 23.4% vs mandate target of 28% – difference of 4.6pp

¹⁴ Based on SMMT analysis of AutoTrader data on EV discounts, SMMT estimated fleet discounts and EV car market data, and JATO sales weighted recommended retail price data

CHART 13 UK NEW CAR REGISTRATIONS BY FUEL TYPE



VANS

The UK's new light commercial vehicle (LCV) market declined by -10.3% in 2025 with 315,422 vans, pickups and 4x4s registered. Fleet renewal shrank in every month other than December, which posted a slight 1.7% rise, reflecting a challenging economic environment and weak business confidence. Tax changes to treat double-cab pick-ups as cars for benefit-in-kind and capital allowance purposes also constrained the market.

Across the year, registrations of new medium-sized vans declined -20.7% to 51,639 units, while large vans dropped -9.8% to 210,262 but remained the most popular segment with a 66.7% share of the overall market.

More positively, deliveries of new battery electric vans rose by an impressive 36.2% with 30,169 registrations – a new annual record.¹⁵ The growth was a significant achievement in a contracting overall market, driven by massive industry investment to provide more than 40 different zero emission van models – representing more than half of new model choice. Despite this offering, manufacturers still had to subsidise the sale of their cutting-edge innovation to bridge the gap between mandated ambition and real-world demand, with almost £400 million in discounts in 2025.¹⁶ The full-year EV market share stood at only 9.5%, however, well short of the 16% mandated for the year and reflecting a clear gap between ambition and reality.

TRUCKS

New heavy goods vehicle (HGV) registrations declined by -10.0% in 2025 with 40,504 new trucks joining UK roads. The market contracted in every quarter, reflecting a challenging economic backdrop and a normalising of fleet renewal after three years of sustained post-pandemic growth.

Positively, new zero emission HGV uptake rose 170.5% year-on-year to reach 587 units – a new record boosted by a more than tripling in year-on-year demand in Q4, up 251.0% with 179 registrations. As a result, the UK surpassed the milestone of 1,000 new zero emission truck registrations in 2025 – success driven by impressive product rollout, with 21 different models across a range of use cases registered last year, and enhanced public grants.¹⁷ However, with zero emission trucks representing just one in every 71 (1.4%) new registrations, the market is still at the very beginning of early adoption. Operators face tight margins and uncertainty on how to integrate zero emission vehicles into their fleets, especially given delays of up to 15 years for depot-to-grid connections, which poses a major disincentive.

The welcome continuation of the Plug-in Truck Grant and the new Depot Charging Scheme will help more operators to switch, but they cannot commit to investment without the guarantee of timely infrastructure delivery. Prioritising road transport depots for grid connections is essential, therefore, with the same fast-tracked planning processes as data centres, wind farms and solar projects able to give more early adopters the clarity and confidence they need to transition.



BUSES

The bus and coach sector retained its position as the UK's most rapidly decarbonising road segment, overtaking progress made across cars, vans and HGVs. Zero emission vehicle uptake rose 62.2% in 2025 to 2,523 units, representing 27.3% of all new public transport vehicles joining the road. This performance positions the UK as Europe's largest zero emission bus market by a significant margin.¹⁸ It is a testament to sustained industry innovation and commitment, as well as substantial government incentives such as the Zero Emission Bus Regional Areas (ZEBRA) fund and ScotZEB, helping accelerate the transition to cleaner, greener public transport across the UK.

¹⁵ SMMT's BEV LCV registration data reflects the Vehicle Emissions Trading Scheme, in which BEVs weighing >3.5-4.25t contribute towards each manufacturer's target, in addition to those weighing ≤3.5t.

¹⁶ Based on SMMT full-year new LCV registration data, JATO vehicle value averages, and Auto Trader discounts.

¹⁷ 1,166 ZEV HGV registrations (above six tonnes) on record

¹⁸ ACEA new vehicle registrations 2025: Germany was the second largest market in 2025, with 1,808 ZEV bus registrations.





The Society of Motor Manufacturers and Traders (SMMT) is one of the largest and most influential trade associations, representing the automotive industry in the UK.

The automotive industry is a vital part of the UK economy, integral to growth, the delivery of net zero and the UK's position as a global trade hub. It contributes £85 billion turnover and £18 billion value added to the UK economy, and in 2025 invested £5 billion in R&D, with 188,000 people employed directly in manufacturing and 830,000 in total across the wider automotive industry.

Many of these automotive manufacturing jobs are outside London and the South-East, with wages 23.5% higher than the UK average. The sector accounts for 11.2% of UK manufactured goods exports (10% of total goods exports) and ships vehicles to more than 140 countries, generating approximately £111 billion in total automotive trade (imports and exports).

The UK manufactures almost every type of vehicle, from cars, to vans, taxis, trucks, buses and coaches, as well as specialist and off-highway vehicles, supported by more than 2,500 component providers and some of the world's most skilled engineers. In addition, the sector has vibrant aftermarket and remanufacturing industries. The automotive industry also supports jobs in other key sectors, including advertising, chemicals, finance, logistics and steel.

SIGNATORIES

Signatories to this report	UK Brands
Alexander Dennis Ltd	Alexander Dennis
Aston Martin Lagonda Ltd	Aston Martin, Lagonda
Autocraft	Autocraft
Bentley Motors Ltd	Bentley
Bosch	Bosch
BMW Group UK, including Rolls-Royce Motor Cars Ltd	BMW, MINI, Rolls-Royce
Caterpillar	Caterpillar, Perkins
Ford Motor Company Ltd	Ford
Jaguar Land Rover Ltd (JLR)	Jaguar, Range Rover, Defender, Discovery
Leyland Trucks	DAF Trucks
McLaren Automotive	McLaren
Morgan Motor Company Ltd	Morgan
Nissan Manufacturing UK Nissan Technical Centre	Nissan
Michelin Tyre plc	Michelin
Scania UK	Scania
Stellantis	Vauxhall, Peugeot, Citroën, Fiat, DS Automobiles, Jeep, Alfa Romeo, Maserati, Abarth, Fiat Professional, Leapmotor
Toyota Motor Manufacturing (UK) Ltd Toyota (GB) plc Toyota Logistics Solutions Centre	Lexus, Toyota
Volkswagen Group (UK) Ltd	Audi, Cupra, SEAT, ŠKODA, Volkswagen Passenger Cars, Volkswagen Commercial Vehicles
Volvo Car UK Ltd	Volvo
Wrightbus	Wrightbus

REFERENCES AND ONLINE CONTENT

References and detailed data on the automotive industry performance can be found at:

www.smmmt.co.uk/sustainability

The webpage also contains links to signatories' sustainability websites.

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

 @SMMT  SMMT
www.smmt.co.uk

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