

Cars and Commercial Vehicles - UK - July 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The cars and commercial vehicle market contracted in 2017 amidst political and economic uncertainty and the decline of diesel. This followed two years of bumper sales and production. Last year’s slump was underpinned by low domestic demand, which fell in line with wavering business and consumer confidence.”
– **Marco Amasanti, B2B Analyst**

This report looks at the following areas:

- **Brexit and potential trade barriers**
- **Demonisation of diesel**

Automotive registrations and production both fell in 2017, the culmination of Brexit uncertainties, a lull in consumer confidence and the ongoing shift away from diesel. Nonetheless, both these figures remain historically high, among the highest recorded in recent decades.

The image of vehicles on British roads continues to change, driven by the shift towards hybrid and alternatively-fuelled vehicles (AFV). However, despite growing at an inexorable rate since the turn of the decade, the AFV sector remains in its infancy, though this should change considerably in the coming years, with many upholding electric as the future of the British and global automotive industry.

The market is set to enter a period of significant uncertainty in the coming years, underpinned by the need to renegotiate international trade deals across the global marketplace, alongside access to the European single market. Exports remain fundamental to the market’s prosperity, so the need for immediate action and a transitional deal is pivotal. The latter was agreed in principle in March 2018, to run to December 2020; however, it remains conditional on both sides (the UK government and the EU) agreeing a final withdrawal treaty.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Cars and Commercial Vehicles - UK - July 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Covered in this Report

Executive Summary

The market
Following record sales in 2016, the industry is set to face a period of difficulty
Figure 1: UK total vehicle registrations and forecast, 2013-2022
Production fell in 2017
Figure 2: Total vehicle production, 2013-2017
Decline in diesel and the rise of alternatively-fuelled vehicles
Figure 3: Decline in diesel and growth in AFV registrations, 2013-2017
The global market
Low consumer confidence
Companies and brands
Expansion of electric offerings
Heavy investment in Chinese market
What we think

Issues and Insights

Brexit and potential trade barriers
The facts
The implications
Demonisation of diesel
The facts
The implications

The Market – What You Need to Know

Total vehicle registrations and production fell in 2017
Alternatively-fuelled vehicles continue to enjoy uptake
The market is set to face a period of great uncertainty

Market Size

Registrations
Figure 4: Total vehicle registrations, 2013-2017
Production
Figure 5: Total vehicle production, 2013-2017

Market Segmentation

Passenger cars

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Cars and Commercial Vehicles - UK - July 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 6: Passenger car registrations and production, 2013-2017

Commercial vehicles

Figure 7: Commercial vehicle registrations and production, 2013-2017

Alternatively-fuelled vehicles

Figure 8: Alternatively-fuelled vehicles registrations, 2013-2017

Market Forecast

Industry set to face a period of uncertainty

Figure 9: UK vehicle registration forecast, 2018-2022

Commercial vehicles to be less impacted

Cars

Commercial vehicles

Figure 10: UK vehicle registration forecast, by cars and commercial vehicles, 2018-2022

The decline of diesel

Figure 11: UK forecast for new diesel cars, 2017-2019

Correlating growth in AFVs

The Impact of the Economy

Inflation surpassed wage growth in 2017, but there are signs of change in 2018

Growing scrutiny on car financing

Market Trends

Consumer confidence

Figure 12: Mintel financial confidence tracker, January 2016-April 2018

Further Vehicle Excise Duty increases

Figure 13: Vehicle Excise Duty, April 2017-April 2018

Growth in the fleet sector

Figure 14: Car registrations by sales type, % of total, 2017

The global market

Figure 15: UK top car export destinations, 2017

Companies and Brands – What You Need to Know

Consecutive growth across Infrastructure

The move to electric and the phasing out of diesel

Mergers and Acquisitions

Industry Structure

Industry Development

Changes in the structure of the industry

Figure 16: Analysis of changes in the structure of the cars and commercial vehicles industry, by number of outlets and businesses, 2013-2017

Structure by turnover

Figure 17: Analysis of the financial structure of the cars and commercial vehicles industry, by turnover and number of businesses, 2016 and 2017

Structure by employment

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cars and Commercial Vehicles - UK - July 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 18: Analysis of the employment structure of the cars and commercial vehicles industry, by number of businesses, 2016 and 2017

Competitive Strategies

- Electric vehicles
- Growing Chinese interest
- Plans to phase out diesel engines

Company Profiles

Daimler UK

Recent company activity

Financial information

Figure 19: Financial analysis of Daimler, 2013-2017

Ford Motor Co Ltd

Recent company activity

Financial information

Figure 20: Financial analysis of Ford Motor Co Ltd, 2012-2016

Peugeot Motor Company Ltd

Recent company activity

Financial information

Figure 21: Financial analysis of Peugeot Motor Co Ltd, 2012-2016

Volkswagen Group UK Ltd

Recent company activity

Financial information

Figure 22: Financial analysis of Volkswagen Group UK Ltd, 2012-2016

Volvo Group UK Ltd

Recent company activity

Financial information

Figure 23: Financial analysis of Volvo Group UK Ltd, 2012-2016

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Methodology

Further Sources and Contacts

Trade associations

Trade magazines

Trade events

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com