Automotive Industry Priorities

22 January 2026

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Chief Executive

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Download a copy of the slides here.

- During presentations (12:30 – 13:30) everyone will be muted so that only the presenters will be heard.

- Polls will be conducted throughout the webinar.

- The presentation will be followed by a Q&A session. Type in your question at any point.

- The use of note taking AI apps will not be permitted and they will be removed.

SMMT
DRIVING THE
MOTOR INDUSTRY

Mike Hawes, Chief Executive, SMMT

22 January 2026

A Review of 2025

SMMT
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UK Automotive

Industry under pressure…

JLR cyber attacks highlight challenges facing UK car industry

UK car production plunges to 76-year low for May

Nexperia halts chip supplies to China in threat to global car production

Automakers hunt high and low for chips as supply crisis worsens

Trump's 25% tariffs on US car imports could threaten 25,000 UK jobs, think tank warns

Car and van output hit by disruption, SMMT warns ECOS tax plans could harm company car market

Government crackdown on car industry perk could drive up used car prices

UK vehicle production hits 76-year low in May as Trump tariffs bite

Car manufacturing figures

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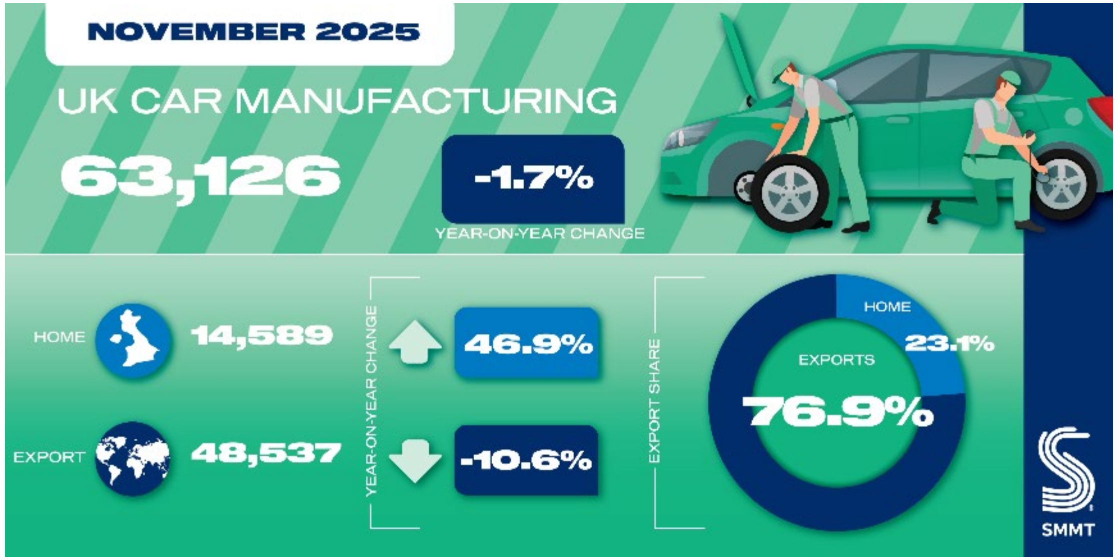
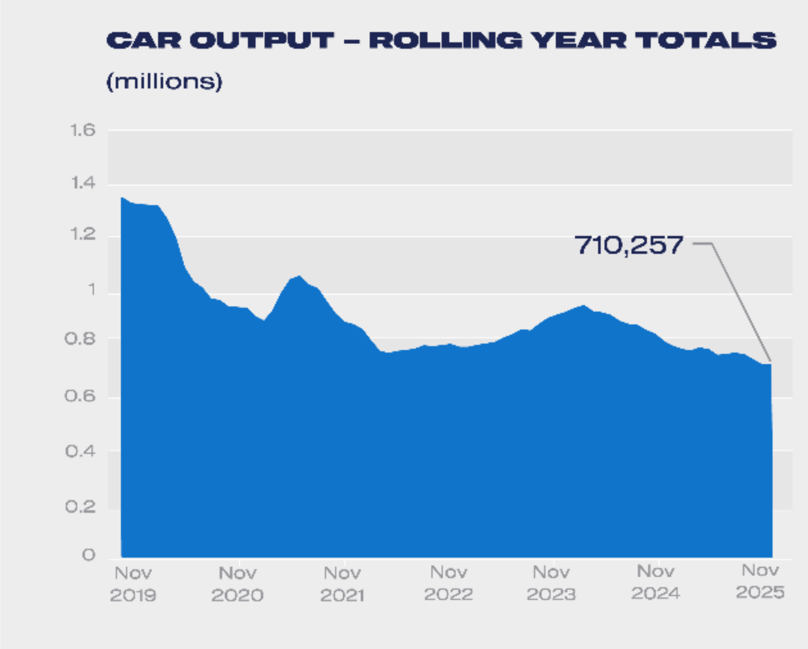
- Car production down -9.4% up to November with 665,235 cars leaving factories.
- Car output dips -1.7% in November as output normalises following cyber incident
- News comes as EV production resumes in Sunderland, with major new model signposting growth next year.





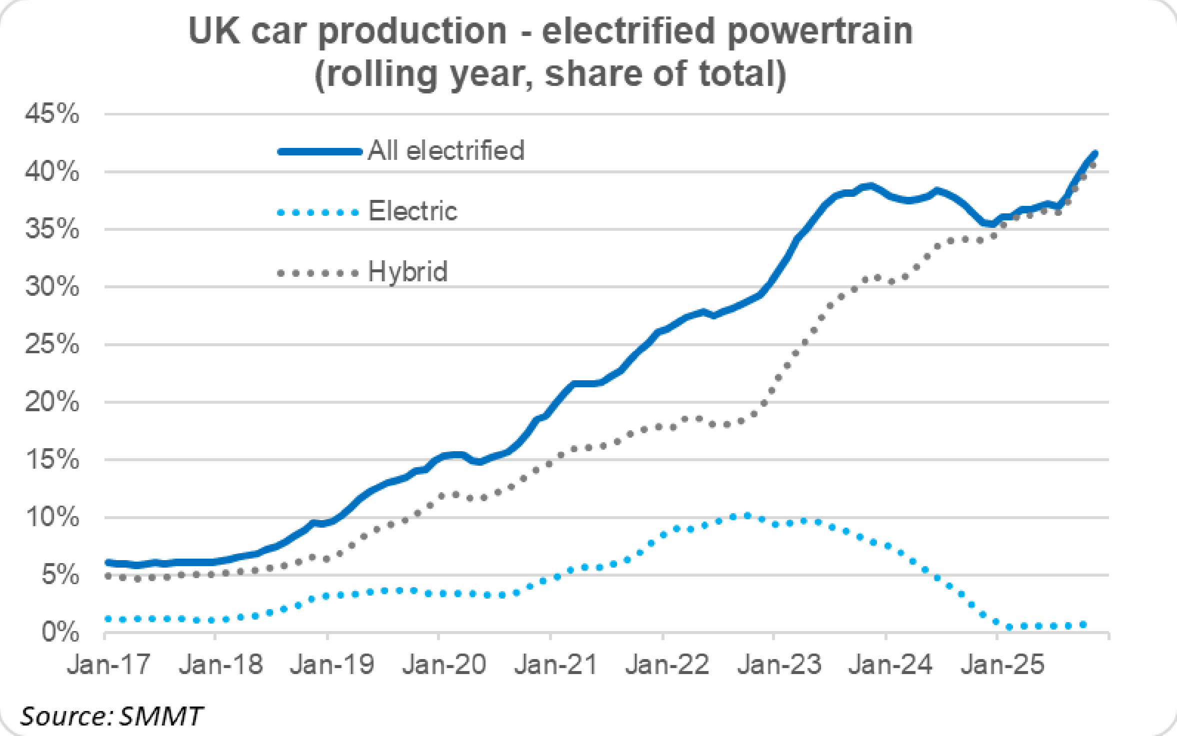
CAR MANUFACTURING

	Nov-24	Nov-25	% change	YTD-24	YTD-25	% change
Total	64,216	63,126	-1.7%	734,562	665,235	-9.4%
Home	9,928	14,589	46.9%	169,053	151,118	-10.6%
Export	54,288	48,537	-10.6%	565,509	514,117	-9.1%
% export	84.5%	76.9%		77.0%	77.3%	

… but increasingly electrified

‘Electrified’ share on the rise, but pure EV impacted by model transitions

- Electrified share of UK car production rose to record 47.8% in Sept and was 40.5% in Nov
- YTD 41.8% (from 35.3% yr ago)
- Volumes were up 7.5% in YTD (double digit gains past 2 months)
- Pure BEVs share <1%
- Transition to BEVs will happen, but timing challenged



Commercial Vehicle manufacturing figures

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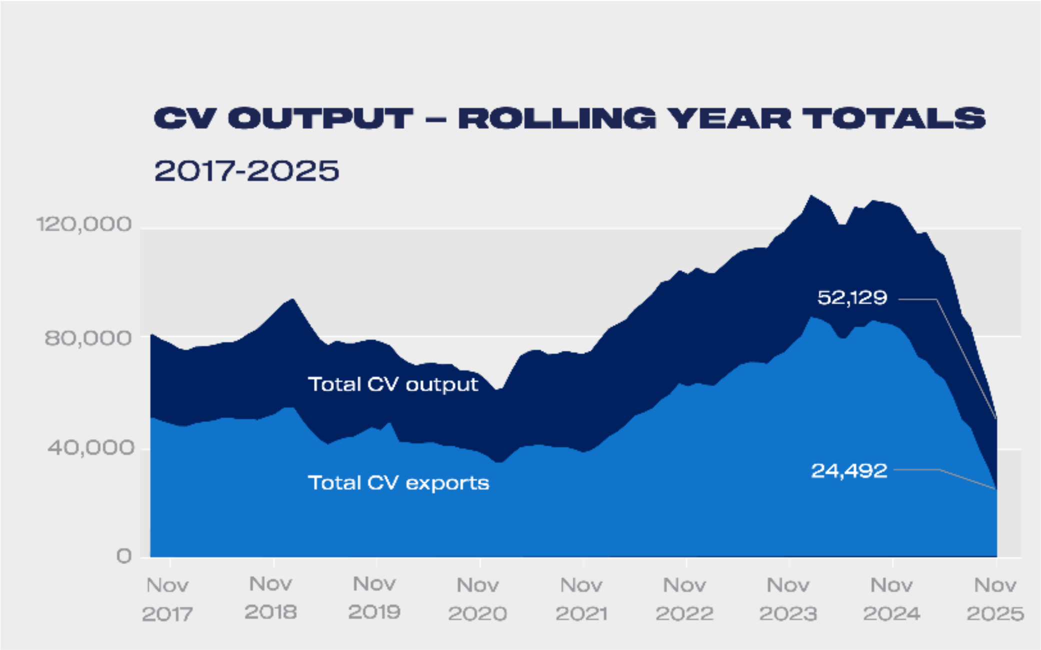
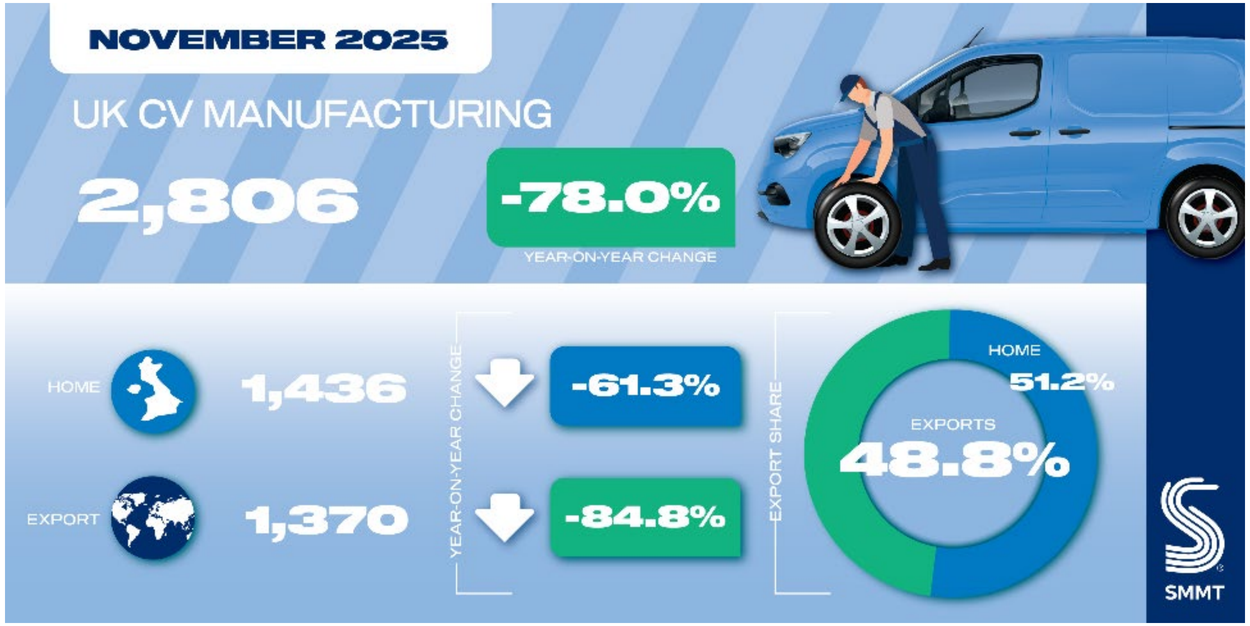
- CV production down -62.0% up to November with 45,063 commercial vehicles leaving factories.
- Commercial vehicle volumes drop for eighth month in November, by -78.0%.



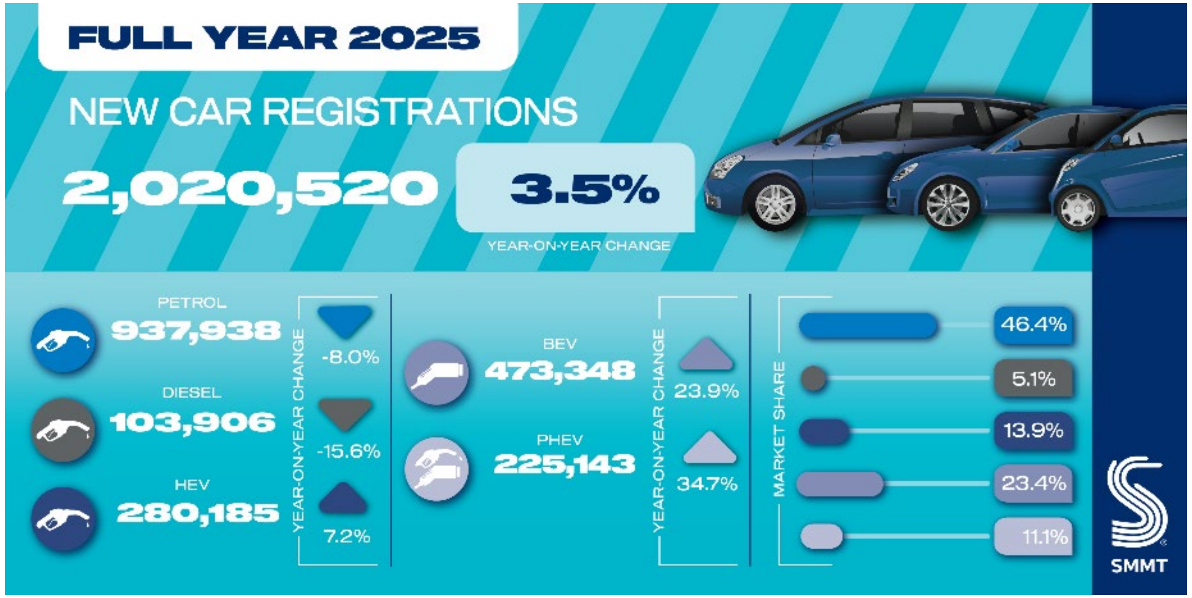


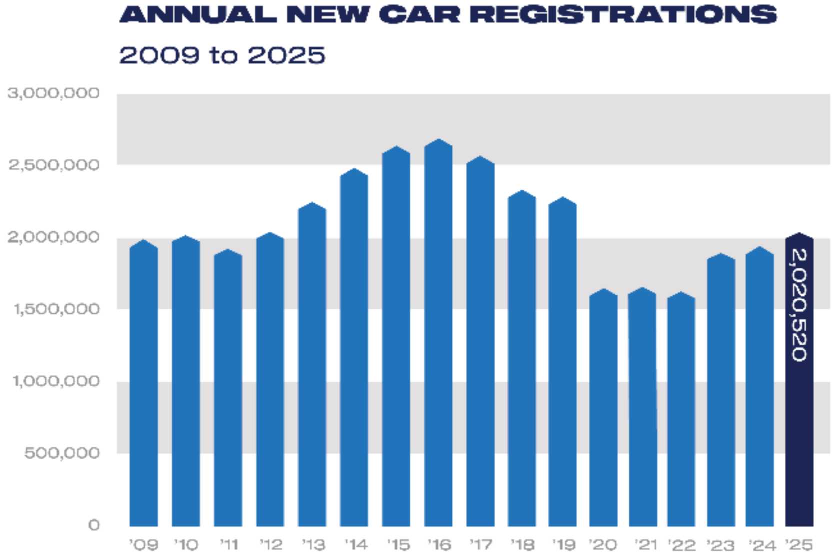
COMMERCIAL VEHICLE MANUFACTURING

	Nov-24	Nov-25	% change	YTD-24	YTD-25	% change
Total	12,749	2,806	-78.0%	118,583	45,063	-62.0%
Home	3,715	1,436	-61.3%	40,207	24,292	-39.6%
Export	9,034	1,370	-84.8%	78,376	20,771	-73.5%
% export	70.9%	48.8%		66.1%	46.1%	

Registrations full year 2025

- New car registrations reach 2.02 million in 2025 with market up 3.5% year on year.
- Internal combustion engine still biggest selling powertrain but growing demand for electrified cars narrows majority to just 51.5%
- Almost half a million new BEVs join the road as around one in four buyers go electric – but gap between demand and ambition widens.
- Industry urges government to bring forward review to support industry competitiveness and sustainability.





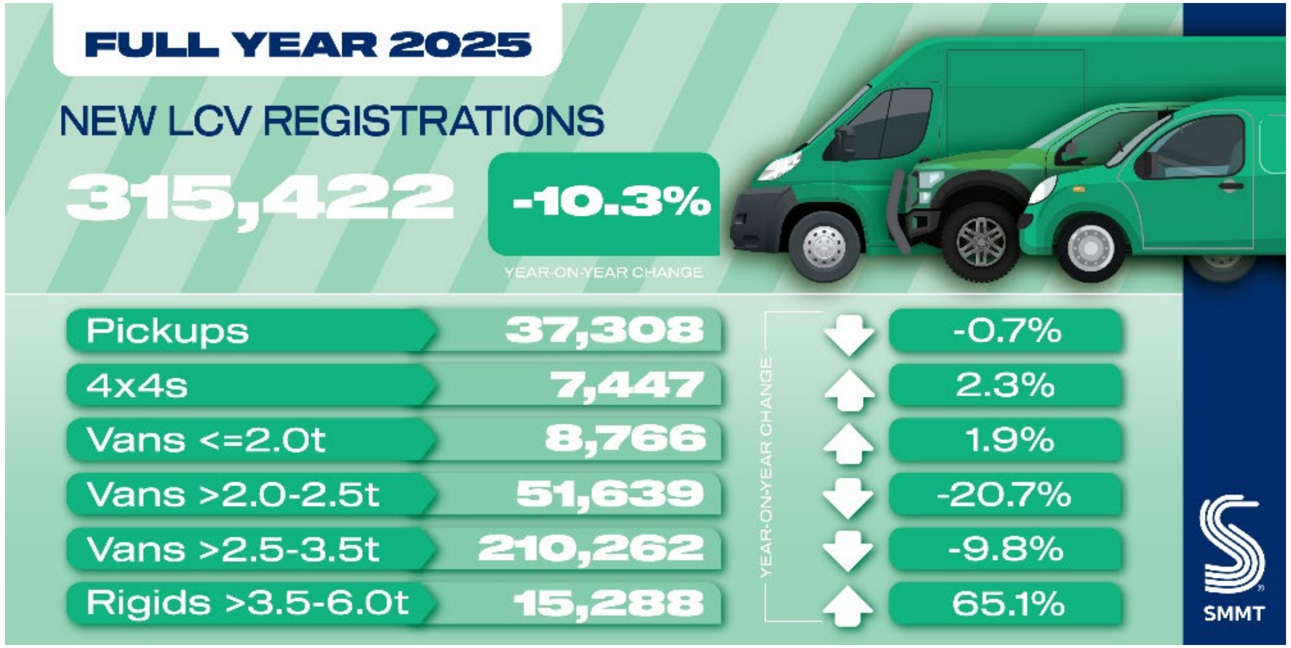
YEAR TO DATE

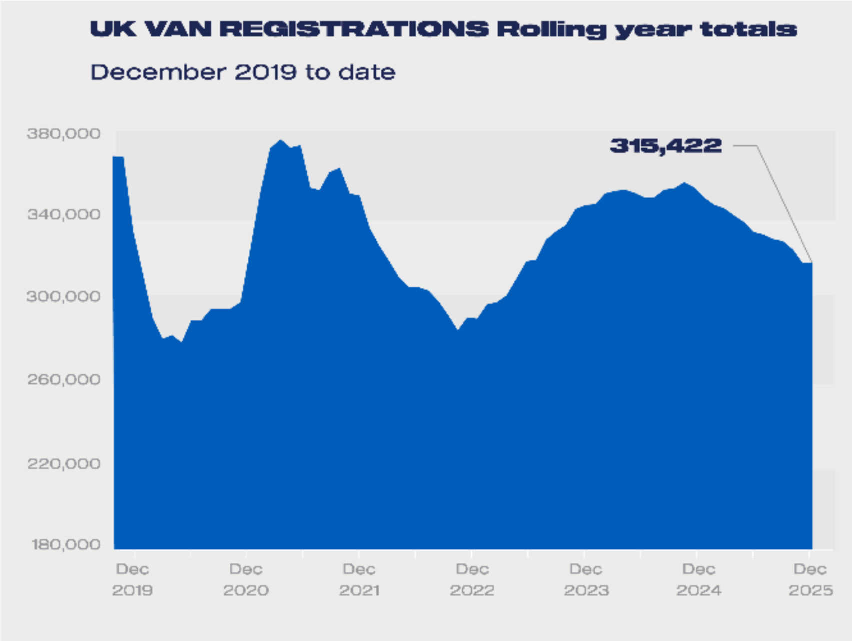
	YTD 2025	YTD 2024	% change	Mkt share -25	Mkt share -24
Diesel	103,906	123,104	-15.6%	5.1%	6.3%
Petrol	937,938	1,019,128	-8.0%	46.4%	52.2%
BEV	473,348	381,970	23.9%	23.4%	19.6%
PHEV	225,143	167,178	34.7%	11.1%	8.6%
HEV	280,185	261,398	7.2%	13.9%	13.4%
TOTAL	2,020,520	1,952,778	3.5%		

BEV - Battery Electric Vehicle; **PHEV** - Plug-in Hybrid Electric Vehicle; **HEV** - Hybrid Electric Vehicle
Diesel and Petrol figures include Mild Hybrid Electric Vehicle (**MHEV**)

LCV registrations full year 2025

- **New light commercial vehicle market declines** by -10.3% with 315,422 registrations in 2025.
- **All but lower-volume segments contract**, including pick-ups after double cab tax change ends growth.
- **EV demand rises 36.2%** but still well below mandated level, with steep 2026 ambition requiring urgent review.



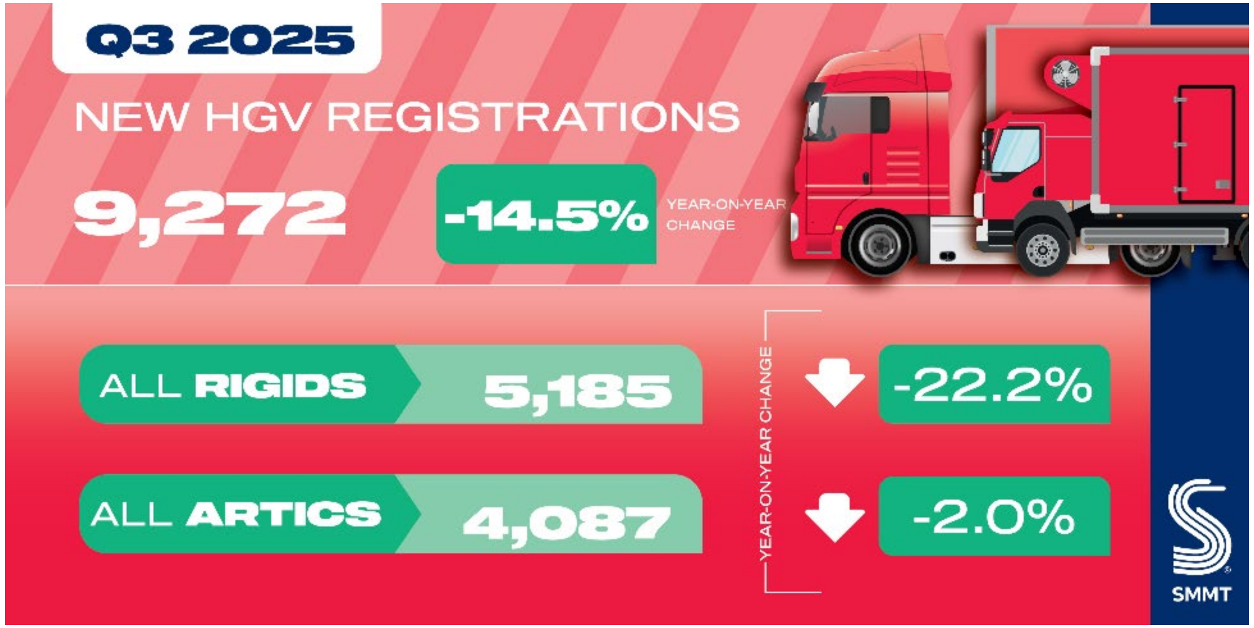


REGISTRATIONS OF VANS plus HCVs 3.5T-6T year-to-date

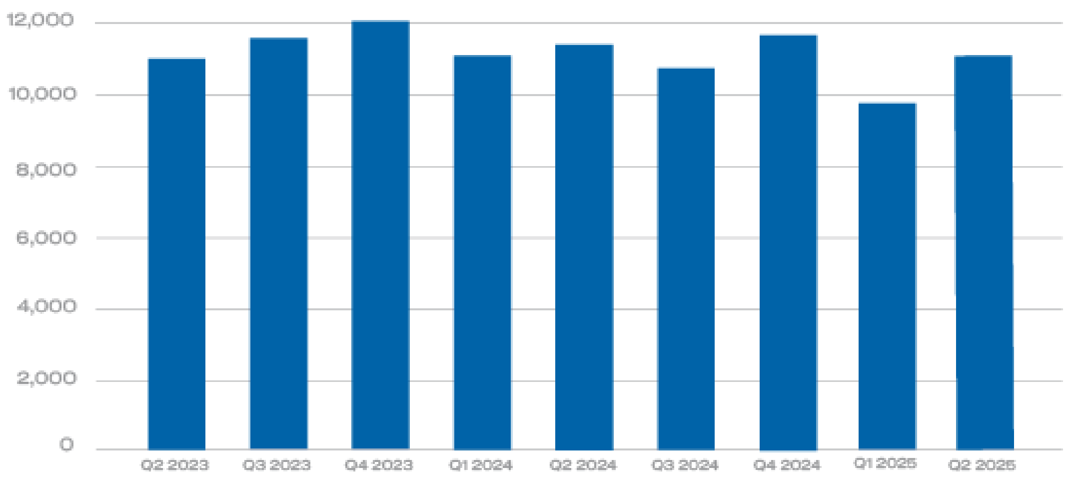
	YTD-25	YTD-24	% change
Pickups	37,308	37,582	-0.7%
4x4s	7,447	7,282	2.3%
Vans <= 2.0t	8,766	8,606	1.9%
Vans > 2.0 - 2.5t	51,639	65,148	-20.7%
Vans > 2.5 - 3.5t	210,262	233,216	-9.8%
All Vans to 3.5t	315,422	351,834	-10.4%
Rigids > 3.5 - 6.0t	15,288	9,259	65.1%

HGV registrations Q1-3 2025

- New heavy goods vehicle registrations fall -12.5% as fleet renewal continues to normalise.
- Fewer deliveries across all truck types bar refuse collection vehicles, but tractor bodies still represent two-fifths of the market.
- Q3 demand has driven year-to-date ZEV volumes to 408 units, up 145.8% compared with 2024.



UK HGV REGISTRATIONS >6T – QUARTERLY TOTALS: Q2 2023 TO DATE



UK HEAVY GOODS VEHICLE REGISTRATIONS: Q3 2025 AND % CHANGE ON 2024

	Q3 2025	Q3 2024	% change	Year-to-date 2025	Year-to-date 2024	% change
HGVs	9,272	10,839	-14.5%	29,195	33,376	-12.5%

Bus & Coach registrations Q1-3 2025

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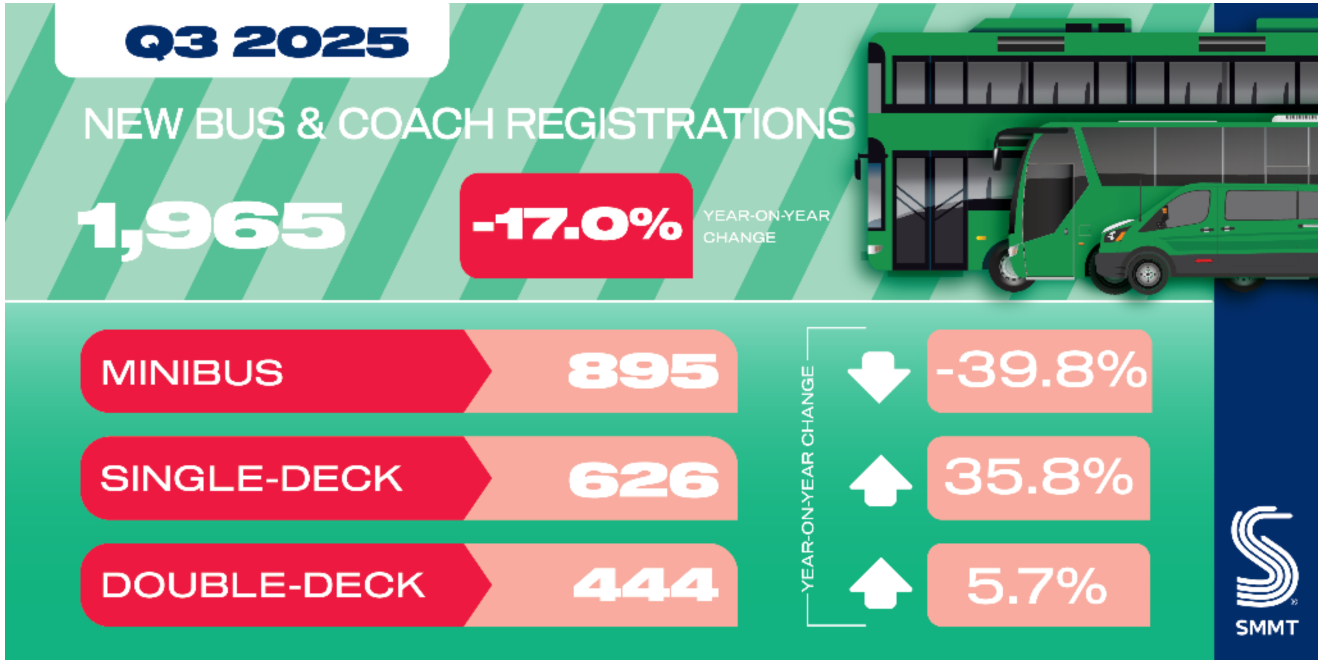
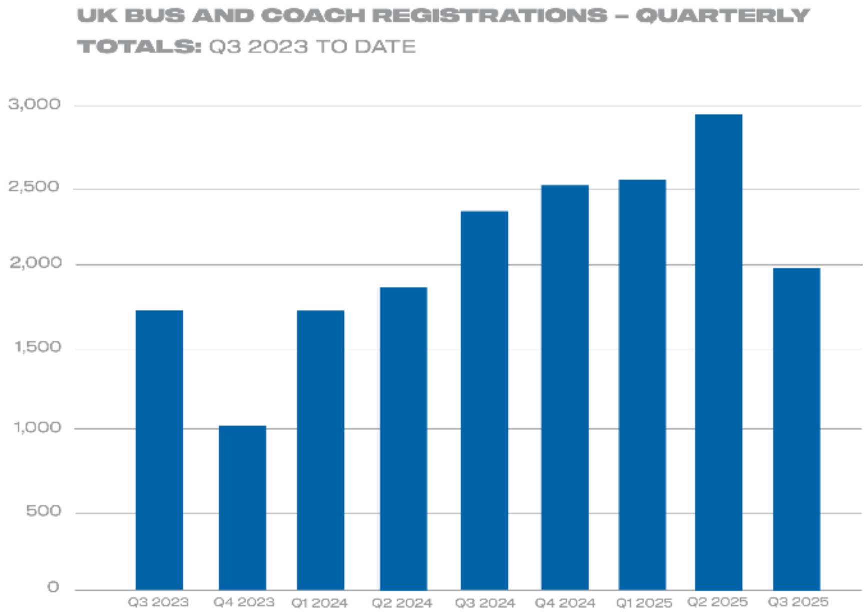
- New bus, coach and minibus market down by -17.0% to 1,965 units in Q3.
- Strong growth in year-to-date market, however, up 26.9% with 7,465 registrations.
- More than one in four (28.7%) registrations are zero emission in first nine months of 2025.





UK NEW BUS AND COACH REGISTRATIONS: Q3 % YTD 2025 AND % CHANGE ON 2024

	Q3 2025	% change	Year-to-date 2025	% change
Minibus <6t	895	-39.8%	3,997	23.4%
Single-deck	626	35.8%	1,965	28.4%
Double-deck	444	5.7%	1,503	35.0%
Bus and coach Total	1,965	-17.0%	7,465	26.9%

Record EV market and share – after record discounting and new model activity

Registrations and market share of plug-in cars in the UK

	2025		2024		2023		2022		2021		2019	
	Registrations	Market share	Registrations	Market share	Registrations	Market share	Registrations	Market share	Registrations	Market share	Registrations	Market share
BEVs	472,348	**23.4%**	381,970	**19.6%**	314,687	**16.5%**	267,204	**16.6%**	190,727	**11.6%**	37,850	**1.6%**
PHEVs	225,143	11.1%	167,178	8.6%	141,311	7.4%	101,414	6.3%	114,554	7.0%	35,234	1.5%
Total plug-ins	698,491	**34.6%**	549,148	**28.1%**	455,998	**24.0%**	368,618	**22.8%**	305,281	**18.5%**	73,084	**3.2%**
All cars	2,020,520	100%	1,952,778	100%	1,903,054	100%	1,614,063	100%	1,647,181	100%	2,311,140	100%

Source: SMMT car registration data

- BEV car market up to record volume in 2025 and BEV share up to 23.4%
- This sub ZEVM 28% target (gap widened in '25) and comes after £5bn discounts and jump to over 160 BEV models on offer (+20%)
- Fleets key to BEV market – with over 70% of BEVs are to large fleet (fleets <60% overall market). Private demand did rise, but still on 15% private buyers gone BEV, vs 29% large fleets
- Battery electric van (to 4.25T) rose 36.2% in 2025 pushing market share to 10.4% - but well below 16% ZEVM's target rate
- Welcome recent support for EVs (grant, change to expensive car VED, etc) but still concerns cost of delivering mandate in soft market

ZEV mandate and 2030 ICE Phase Out

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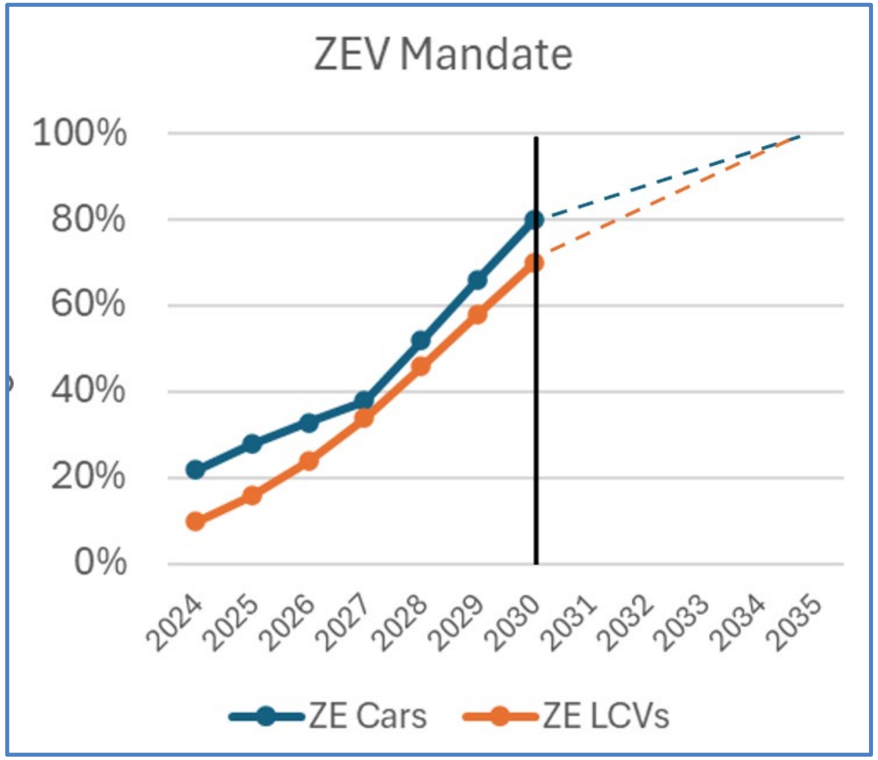


Cars: 23.4% actual versus **28%** target
Vans: 9.5% actual versus **18%** target

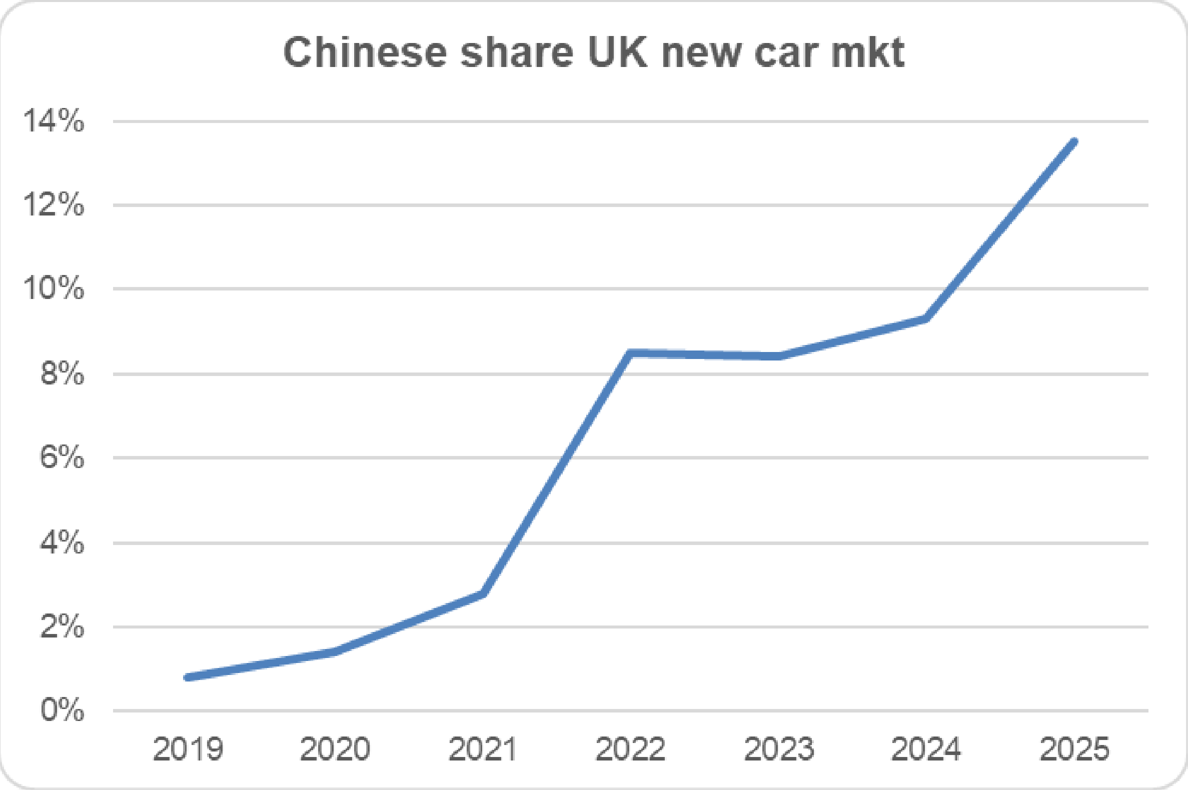
- Expanded/extended VETS Flexibilities
- £2bn (£650m + £1.3bn) funding for Electric Car Grant (ECG) to 2029
- Extension of the PiVG through to 2026
- Upward adjustments to the threshold for the VED Expensive Car Supplement
- £3bn commitment to DRIVE35 (£1.4bn initially, with £1.5bn for 2030-2035)
- includes dedicated £400m funding for charging infrastructure roll out

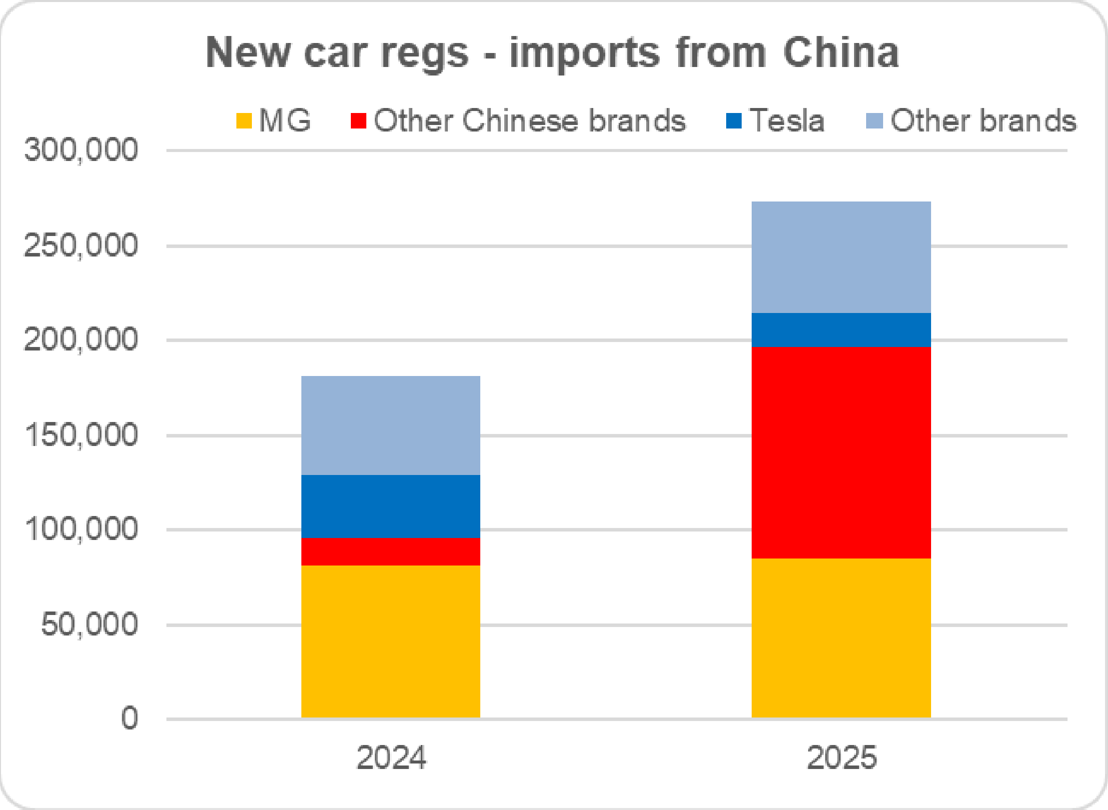
- Announcement of “eVED” – a pence per mile tax to be applied to EVs from 2028
- Continuation of freeze in fuel duty and only a staggered removal of the 5p discount
- Application of the London Congestion Charge to EVs (albeit discounted by 25%)
- No clarity on 2030 end-of-sale, or future regulation to 2035

Chinese market share increases (new car market)

Chinese-built cars 13.5% (23.3% in December)

Chinese brands 9.7% full year





BYD, Changan, Chery, Geely, GWM, Jaecoo, Leapmotor, Maxus, MG, Omoda, Skywell and Xpeng

2025 – Domestic Strategies and Global Headwinds

Strategies and fiscal interventions to fix UK growth, while treading carefully on the world stage

Year in Numbers

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500+
engagements with politicians and advisers from all parties at industry meetings, roundtables and events. SMMT responded to 35+ consultations and calls for evidence on topics from automated vehicles and bus services to the ZEV transition, type approval, data privacy and trade

7,000+
people attended 112 SMMT webinars and in-person events including driving days, political roundtables, market briefings, press conferences, receptions, workshops and networking sessions

1,500+
employees from 490 companies attended training events run by SMMT Industry Forum. These are aligned to international standards such as IATF 16949, AIAG core tools and VDA methodologies to develop competencies that improve competitiveness throughout the automotive supply chain from OEM to Tier n

30,700
automotive manufacturing sites across the world certified to global quality management system IATF 16949 by SMMT reporting certification bodies, allowing them to demonstrate compliance and a commitment to continuous improvement

30,000+
SMMT media articles, TV and radio interviews promoting the industry and its priorities, driven by 200+ press releases and statements and engagement with 700+ influential UK national, regional, consumer, international and B2B journalists attending 14 briefings, driving events and receptions

1 million
page views on smmt.co.uk, including 20,500 report downloads, by industry, government and global media accessing our world-leading data, insight and guidance and to stay up to date with latest SMMT news and comment

125+
aftermarket and supply chain companies supported to trade globally through missions, inward delegations and webinars, resulting in hundreds of new business leads, with reported contracts worth at least £1.31m

27.4 million
look-ups on SMMT's online Vehicle Safety Recall Service, which covers 98% of the UK vehicle parc, by DVSA, fleets, dealers and consumers

2.2 million
social media impressions, with 67,000 generated by our Electrified and Summit events activity, including 115,000+ video views, all driven by some 1,380 posts. A further 106,000 engagements, including from politicians, media and other key influencers

£98.9 billion
worth of new vehicles processed by SMMT's MVRIS service, with 124,000 data reports produced for manufacturers, dealerships, parts suppliers, investors, the Bank of England and others to support planning

265,000
consumer contacts were received by The Motor Ombudsman, which went on to handle more than 13,000 cases. Meanwhile consumer awareness of the service grew to 66%

SMMT Influence 2025

FEBRUARY

An all-new SMMT website is launched, with enhanced content and user experience, and dedicated SEO to give the industry's strengths and positions the highest possible public digital profile

MARCH

SMMT lobbying leads to Plug-in Truck Grant extension with OEMs able to use VECTO reports to demonstrate eligibility – saving £15,000 per vehicle, on average, in additional testing costs

The DVLA agrees V149 VED rates will be published within a month of Budget following SMMT engagement, making it easier for industry to update price information

SMMT's Chief Executive, Mike Hawes, is appointed to the reformed Board of Trade to ensure automotive is at the heart of discussions on the future of trade

APRIL

UNECE adopts SMMT proposals to amend lighting regulations to permit installation of a rear manoeuvring lamp and remove the 2-metre-width parking lamps restriction, allowing energy savings

SMMT-led calls for greater Vehicle Emissions Trading Scheme flexibilities result in several supportive regulatory amendments. Government also confirms full hybrids may be sold until 2035

UK regulation replicates an international exemption allowing five years to phase out hard to replace chemical UV-328, used to protect against sunlight. SMMT's vigilance prevents significant supply chain disruption

The Commercial Vehicle Show is sold after 25 years to events specialist Nineteen Group, backing its growth. SMMT retains long-term partnership status, with a 15% exhibitor discount for members

SMMT secures regulatory amendments allowing hydrogen-fuelled plant equipment to operate on GB roads without a VSO, reducing red tape while updating regulations to new alternative fuels

MAY

SMMT obtains clarification on the new Home Office communications data requests regime under the Investigatory Powers Act, allowing direct engagement with Police on practical implementation

JUNE

SMMT supports fleet uptake of 4.25T BEVs by securing Category B driver licence derogation amendments to allow towing and provide for WAV and passenger vehicles, without onerous training

The UK obtains the first Trump Administration trade deal, with preferential treatment for UK-made cars. It follows a strategic SMMT trade policy mission and USTR engagement

The UK Trade Strategy is published, reflecting SMMT input on supporting balanced trading relationships that break down tariffs and promote market access, and committing to explore rejoining the PEM Convention

The Industrial Strategy, with auto one of only eight identified growth-driving sectors and its own £2.5bn fund, launches. It follows intense government collaboration, with DBT's press notice quoting SMMT

SMMT Industry Forum completes a World Bank-funded Türkiye Supplier Development Programme helping companies meet Turkish Electric Bus Manufacturer standards. Performance improvements range from 19.3% to 110.6%

JULY

The first UK-India FTA is signed. SMMT engagement with negotiators helps secure vastly reduced tariffs on ICE vehicles from day one and on EVs and parts longer term

A new Sustainability Hub is launched at smmt.co.uk helping members to navigate the increasingly complex ecosystem of international and domestic voluntary and regulated requirements

The Electric Car Grant and an 18-month Plug-in Van Grant extension are announced. Both follow lengthy SMMT campaigns for support to drive market demand, which lags significantly behind targets

SMMT instigates amendments to GB Type Approval to align with EU requirements on eCall and other vehicle testing aspects, including VECTO, ISOFIX and ALKS, reducing double testing

The Motor Ombudsman receives its one millionth consumer contact since launching in 2016, coinciding with the 10th anniversary of the Alternative Dispute Resolution regulation

Government delays legislation to end ECOS schemes to October 2026. SMMT continues to lobby strongly against the measure, with ministerial engagement supported by a public campaign

AUGUST

SMMT Industry Forum provides training for the APC-Zenzic Mobilise 2025 early-stage accelerator programme supporting SMEs and start-ups developing ZEV or CAM technologies and services

Following a raft of new UK employment legislation, and government's pledge to reform employee entitlements, SMMT partners with legal firm Croner to offer members a round-the-clock helpline

SEPTEMBER

SMMT Industry Forum pilots a new Supplier Development Programme designed to set a benchmark for quality excellence in the UK automotive sector

SMMT evidence helps convince government to bring forward self-driving passenger services pilots to 2026. Two companies have since announced plans to launch services in London under the scheme

SMMT negotiates a new Climate Change Agreement scheme to 2030, with a 90% discount on climate change levies set to save UK manufacturers an annual £13 million

Meet the Heavy Body Builder is the latest event to join SMMT's Meet the... matchmaking series following June's Meet the Van Accessories. Together they deliver 73 new business meetings

As the UK's biggest cyber incident strikes the sector, SMMT reacts quickly, convening the Automotive Components Section with government to assess the impact and identify mitigation measures

OCTOBER

The UK Vehicle Intelligence Hub, an in-house data platform, goes live, making it easier than ever for industry and government to access SMMT's extensive and growing suite of vehicle data 24/7

SMMT hosts its first ever Innovation Symposium alongside a new report promoting the UK's RD&I capabilities and attractiveness as a global investment destination

As part of efforts to promote automotive remanufacturing as a growth driving industry, and secure its place in government's Circularity Strategy, SMMT publishes its first report into the sector

NOVEMBER

Government announces that the Climate Change Agreement (CCA) Scheme will be open to EV battery production from 2027, following SMMT lobbying efforts to shore up the UK's investment appeal

SMMT Industry Forum begins work for the UK-Ghana Partnership for Jobs & Economic Transformation programme to develop Ghana's automotive foundations and strengthen UK supply chain links

An SMMT-British Motor Museum initiative allowing four apprentices to join the London to Brighton Veteran Car run leads to ITV News coverage, raising the profile of automotive innovation and careers

Supply chain achievements 2025

CHAMPION THE SUPPLY CHAIN

Crisis response to support suppliers following **JLR cyber attack**, facilitating links between suppliers, JLR and government:

- x2 extraordinary ACS meetings
- 168 attendees
- x3 member surveys

Remanufacturing report launched to champion the independent remanufacturing sector.

DRIVE LOCALISATION

Delivered **170 meetings** across **14 buyers** at **Meet the Buyer**, delivering opportunities for commercial conversations around localisation opportunities.

SMMT MEET THE BUYER

Supported **sourcing programmes** with the aid of an improved Auto Supplier Finder and integrated EV Directory.

x2 **Auto to Defence** webinars providing guidance on entering the sector.

BUILD UK COMPETITIVENESS

Sustainability Hub launched to support the supply chain navigate the complex sustainability landscape.

Total Cost of Acquisition toolkit launched in partnership with WMG to support supplier competitiveness assessments.

Working across all sectors

- Productive workshops with stakeholders including DESNZ, DBT, DFT, DVSA covering Industrial Strategy, Business Growth Service, Circular Economy, Battery Transportation and Storage, MOT reform and EV repairability
- EV SCG meeting agendas covering cross-sector opportunities to support diversification
- Joint SC Forum at Toyota to promote cross supply chain collaboration and networking
- UKLF Finished Vehicle Logistics session in partnership w/ ECG to discuss
- Removal of five-hour driver training requirement for 4.25t EV Minibus and LCV
- Aftermarket Report launch
- Aftermarket and CV Leaders Dinner at Automechanika Birmingham and CV Show
- New Meet the Van Accessories and Meet the Heavy Bodybuilder CV events
- Push on regulatory alignment with EU on SERMI, VECTO, Dual Marking and success on longer lead time for UNECE Side Guards for Trailers

SMMT events – highlights from 2025

SMMT
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Automotive Summit

Annual Dinner


Drive Live


Future Motability Asia


Test Day

Regional Forum
Oxford


Electrified


Meet the Buyer

Poll 1

Do you think your business will grow or decline in 2026?

A look ahead to 2026

2026 – a changing tide for UK automotive?


Challenging domestic & international political landscape


Economic growth and maintaining a competitive market


Trade, Rules of Origin and Tackling Protectionism


Zero Emission Vehicle (ZEV) Transition Review


Industrial Strategy implementation & UK Competitiveness


Regulatory Development, Alignment & Simplification


UK's place in 'Made in Europe' & EU-UK Relations


Automated Vehicle (AV) regulation & deployment


Employment, Skills & the Workforce

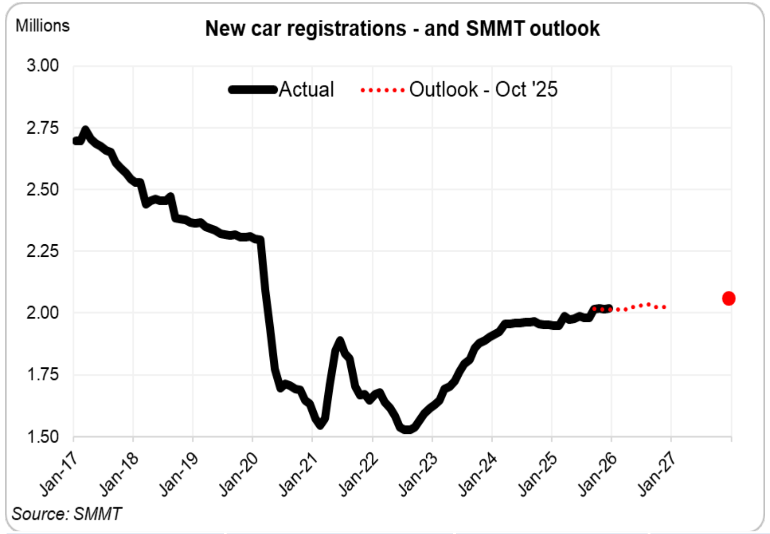

HDV Decarbonisation Strategy

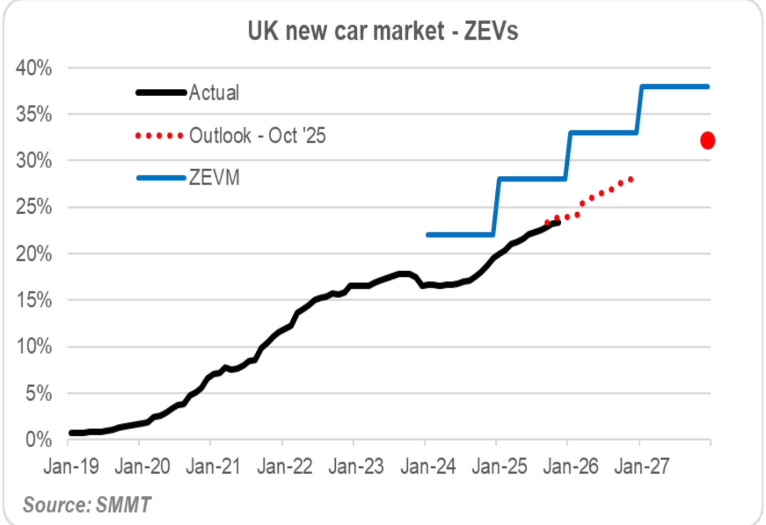

Supply Chain Growth & Resilience

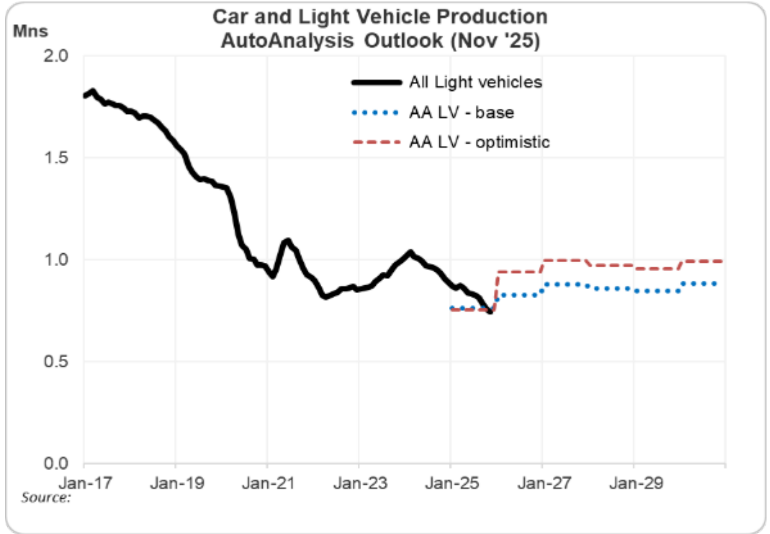

Circular Economy & Sustainability Regulations

Market and production trends and outlook

Car mkt up, helped by BEVs (but sub-Mandate). Production constrained, but to



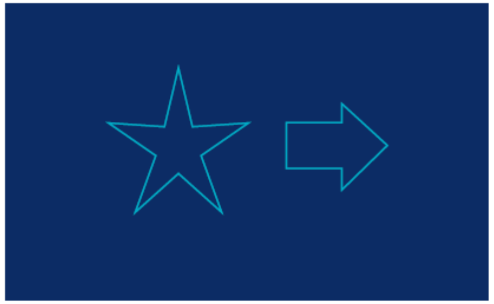




Vol/Share	Car regs	*BEV sh*	*PHEV sh*	*HEV sh*	LCV regs	*BEV <3.5T Sh*	HCV regs	B&C regs	Vehicle prod
2024	1.953mn	*19.6%*	*8.6%*	*13.4%*	352k	*5.8%*	45k	8.3k	0.905mn
2025	2.021mn	*23.4%*	*11.1%*	*13.9%*	315k	*8.8%*	41k*	10k*	0.762mn*
2026F	2.032mn	*28.2%*	*12.1%*	*15.4%*	335k	*14.0%*			0.848mn
2027F	2.058mn	*32.2%*	*12.9%*	*16.6%*	337k	*20.6%*			0.890mn

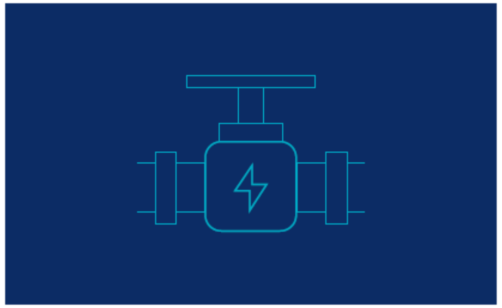
*latest

Key Priorities



COMPETITIVENESS & INDUSTRIAL STRATEGY

UK Automotive competitiveness remains our overarching priority and in the global race **for investment and technology leadership** we will continue to strive for the **conditions to attract and sustain battery production, electrify supply chains, upskill** and diversify **the workforce, and help our existing manufacturing base prosper** and grow. Key to this will be holding government to account on delivery of the Modern Industrial Strategy. **Accelerated energy cost interventions**; skills funding reform; programmes to support supply **chain resilience;** rapid deployment of DRIVE35 funding; and measures that support **healthy markets** will all drive our 2026 competitiveness mission.



SMART & SUSTAINABLE MOBILITY

Supporting the industry through the once in a century **ZEV transition** will remain a headline priority. We will forensically **review the ZEV Mandate's** impact and **market response to policy interventions,** while pursuing tax reform that supports the transition. Lobbying to accelerate affordable **infrastructure rollout** and for delivery of an **HGV strategy** without burdensome regulation will continue – as will promotion of ZEVs in all their forms, including supporting a new **government-led consumer campaign** and engagement on **ZEV repairability.** Meanwhile, as pilots of **self-driving passenger services** commence, we will develop our work to support **consumer education and acceptance.**

INTERNATIONAL TRADE

Free and fair trade is the bedrock of UK Automotive, and in the face of geopolitical turmoil and mounting protectionism, collaboration with government and global stakeholders will be key. We will vigorously **promote the UK as an attractive investment destination** and export partner; pursue **trade cooperation and balanced trade deals** that support the UK's industrial capability and market access through **appropriate Rules of Origin.** We will advocate **partnerships with minerals-rich countries** and continue to **push for a modern border and customs framework,** all while engaging with government to mitigate against regulatory divergence wherever appropriate.

BUSINESS DEVELOPMENT

We will continue to support member businesses by **expanding our national, regional and digital engagement platforms,** facilitating **business connections** and knowledge exchange, and offering **competitiveness and skills development programmes** to help members meet **global standards** and capitalise on emerging trends. We will further **enhance our world-class vehicle data platform,** while our **high profile UK events,** including SMMT Electrified, Test Day and Summit, will address the industry's major issues and promote its progress. Meanwhile, we will facilitate export growth and partnerships in strategically important markets worldwide, through **market intelligence, events, trade missions and inward delegations.**

SMMT Priorities 2026 - strategic policy & comms

SMMT DRIVING THE MOTOR INDUSTRY

Campaign priorities & key positioning moments (H1)

ZEV transition – accelertion

- Transition Review
- HGV Green Paper
- Taxation
- Infrastructure

Competitiveness

- Industrial Strategy – BICS (energy) & DRIVE 35
- Supply chain resilience
- Circular Economy incl. ethical & sustainable supply chains
- Upskilling & Reskilling

EU & Global Trade

- UK-EU Reset / 'Made in Europe' / Rules of Origin / PEM
- Global trade – US; China
- FTAs ratification and negotiation – India, Korea, Canada

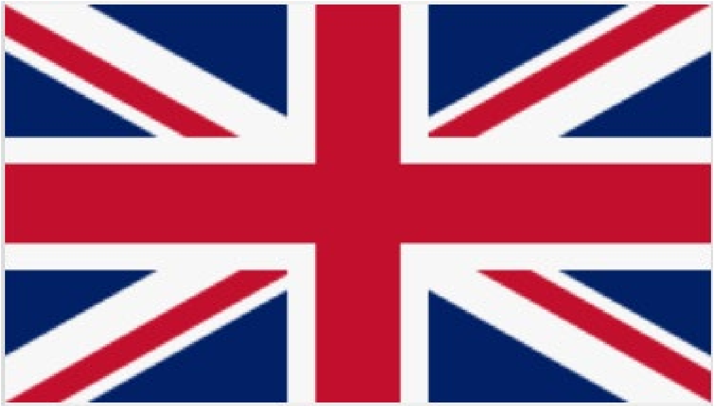
Technology & innovation

- AV Act consultations
- 2027 AV deployment
- Road Safety Strategy
- UK R&D focus

FY car & LCV market & production results briefings (Jan)	National Apprentice Week (Feb)	FY HGV / Bus & Coach / Used Car market figures (Feb)	CHx Spring Statement (Mar/Apr)	SMMT Electrified & press (Mar)	SMMT Brussels R'tion (Apr)	CV Show & hosted media (April)	SMMT Test Day (May)	GREAT in LA (May)	SMMT IAS & press (Jun)

January – June 2026

2026 – regulatory priorities



HGV CO2 Framework – Weights & Dimensions

VETS Review / Post-2030 Car and Van Regulation

Zero Emission Van flexibilities – EU and GB legislation

GB Type Approval – GB/NI dual marking

Transition to Electronic Certificates of Conformity

e-Call – new generation regulation & 2G/3G switch off prep

EU Regulatory alignment? – GSR2 / Euro 7

Automated Vehicle (AV) - domestic and international

Battery regulation & consumer labelling

Buses – crash protection international regs

Equitable Occupant Protection – international regs

Vehicle insurance and crime prevention

Circular Economy / ELV / Life Cycle Analysis

Self-driving vehicles: robotaxis could arrive in 2026

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Massive regulatory and consultative programme looked to keep UK on track for deployment

Jul 2015	Jul 2018	May 2024	Jun 2025	Spring 2026	Second half of 2027
DfT Code of Practice for AV Trialling published	Automated & Electric Vehicles Act 2018 passed	Automated Vehicles Act 2024 passed	£150m CAM Pathfinder funding	Automated Passenger Services Permitting Scheme Regulation	Full regulatory framework for automated vehicles

AV testing and trialling: >£600m investment since 2015

Pilot deployment of British automated driving technology abroad

Pilot commercial deployment of **automated passenger services** with or without safety driver:

- taxis
- ride-hailing
- shuttles
- buses

Potentially interested companies

WAYMO

WAYVE Uber

apollo lyft Uber

Full commercial deployment of any automated vehicles

Trade negotiations and FTA implementation

SMMT DRIVING THE MOTOR INDUSTRY

	AGREEMENTS	POTENTIAL IMPACTS
IN FORCE	CPTPP	Canada and Mexico ratification pending
	United States	Economic Prosperity Deal – automotive provisions in force since 30 June 2025
SIGNED	India	Balanced with major compromises Complex FTA – quotas and staging
AGREED	South Korea	Key gov and industry priority,
IN PROGRESS	GCC	Key gov & industry priority
	Türkiye, Switzerland	Focus on digital, NTBs
ON HOLD	Israel	Link to PEM
	Canada	Suspended due to AG disagreements
	Mexico	EU cumulation extended

- **Traditional FTAs losing momentum**
  - Focus on ratification and implementation (India, South Korea)
- **EU-UK TCA & US EPD remain highest industry priorities**:
  - EV ROO – agree on CAM guidance, avoid tariffs in 2027
  - Progress on PEM, CBAM
  - EPD – TRQ utilization and potential improvements, tariffs on MHDVs
- **Geopolitical and industrial tensions (MiE, Nexperia, etc.)**

Supply Chain priorities 2026 – A focus on resilience

1. NAVIGATING THE FUTURE

Help members navigate the future to support planning and investment.

- Geopolitics
- Trade
- Regulation
- Outlooks
- Insights

2. WINNING NEW BUSINESS

Build resilience through diversification of customers and sectors.

- Localisation
- Matchmaking
- Exports
- Diversification
- Networking

3. BUILDING COMPETITIVENESS

Drive competitiveness improvements to build supplier resilience.

- Influence policy and regulation
- Champion Auto
- Support on energy
- Improve quality

4. SUPPORTING INVESTMENT

Help suppliers invest, driving productivity, competitiveness and resilience

- Navigate funding landscape
- Influence funding
- Encourage investment

5. BOOSTING OPERATIONAL RESILIENCE

Help members boost operational resilience in light of challenges, threats and disruption.

- Safe Harbour
- Crisis readiness
- Cyber security support
- Skills development

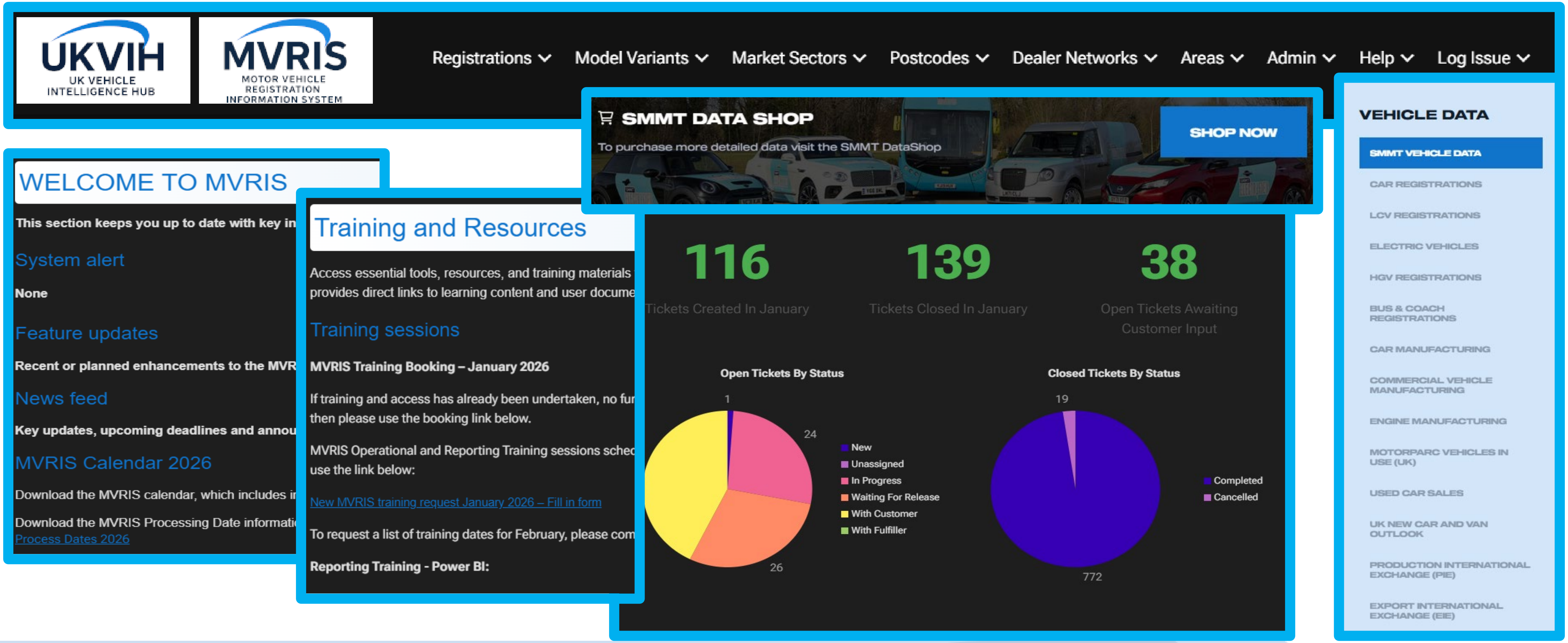
Other Sections Priorities 2026

- Aftermarket: Further work on MOT Reform, SERMI deployment and EV/ADAS repairability; more collaboration with OEM.
- Bus, Coach and Minibus: supporting enhanced Local Authority control of services including with Meet the Bus Operator event; Bus and Coach Expo at CV Show (15% saving for member exhibitors); SMMT Bus Report
- Commercial Vehicle: Heavy vehicle decarbonisation input through HGV CO2 Task Force
- EVSCG: Member Pavilion at Vehicle Electrification Expo / Battery Cells & Systems Expo
- SVBG: Multi department/agency engagement on approvals processes and development
- LTTE: Ensuring EV infrastructure for towing vehicles, developing Towing and the Law
- UKLF: Battery transportation and storage best practice framework and engagement with insurance sector

SMMT Data Intelligence (SDI)

SMMT DRIVING THE MOTOR INDUSTRY

The new **UK Vehicle Intelligence Hub**: more data, more access, more development, more value



Poll 2

Do you see decarbonisation including electrification as an opportunity or threat to your business in 2026?

Member Services Engagement in 2026

- **Legal Helpline** – working with legal consultants to provide SMMT SME members a helpline for Employment and HR focused enquiries
- **DE&I** – along with workshops Members can access the Toolkit or reach out to Mercer Marsh Benefits for further support and training
- **SMMT Energy Partner** – working with energy consultants to bring savings to SMMT members
- **Supply Chain and Business development** – providing even more opportunities for members through new “Meet the” events at Bus Operator, Engineer and the return of Van Converter
- **Auto Supplier Finder** – bringing improved functionality to the leading automotive database
- **Manufacturing Competitiveness** – Growing support in specialist certification, training and consultancy

SMMT DRIVING THE MOTOR INDUSTRY

2026 Dates for your diaries

www.smmt.co.uk/events

UK Events

SMMT's International Women's Day & Allies event
SMMT offices, London | 5 March

SMMT Electrified
QEII London | 12 March

CV Show
NEC Birmingham | 21-23 April

LGBTQ+ & Allies workshop
Birmingham | 30 April

SMMT Test Day
UTAC Millbrook | 21 May

Meet the Buyer
NEC Birmingham | June

SMMT International Automotive Summit
IET London | 30 June

In-House Lawyers Seminar
SMMT offices, London | 8 October

SMMT Regional Forum East
Wales | October

108th SMMT Annual Dinner
London | 24 November

2026 Dates for your diaries - International

www.smmt.co.uk/international

India:
SIAT
Pune | 27-30 Jan | Technology

India:
ACMA Automechanika New Delhi
New Delhi | 5-7 Feb | Aftermarket

China:
Auto China
Beijing | 24 Apr-3 May

Germany:
Battery Show Europe
Stuttgart | 9-11 Jun | Technology

Germany:
Automechanika Frankfurt
Frankfurt | 8-12 Sep | Aftermarket

USA:
Southeastern US trade mission
Georgia & South Carolina | 6-8 Oct | Supply chain

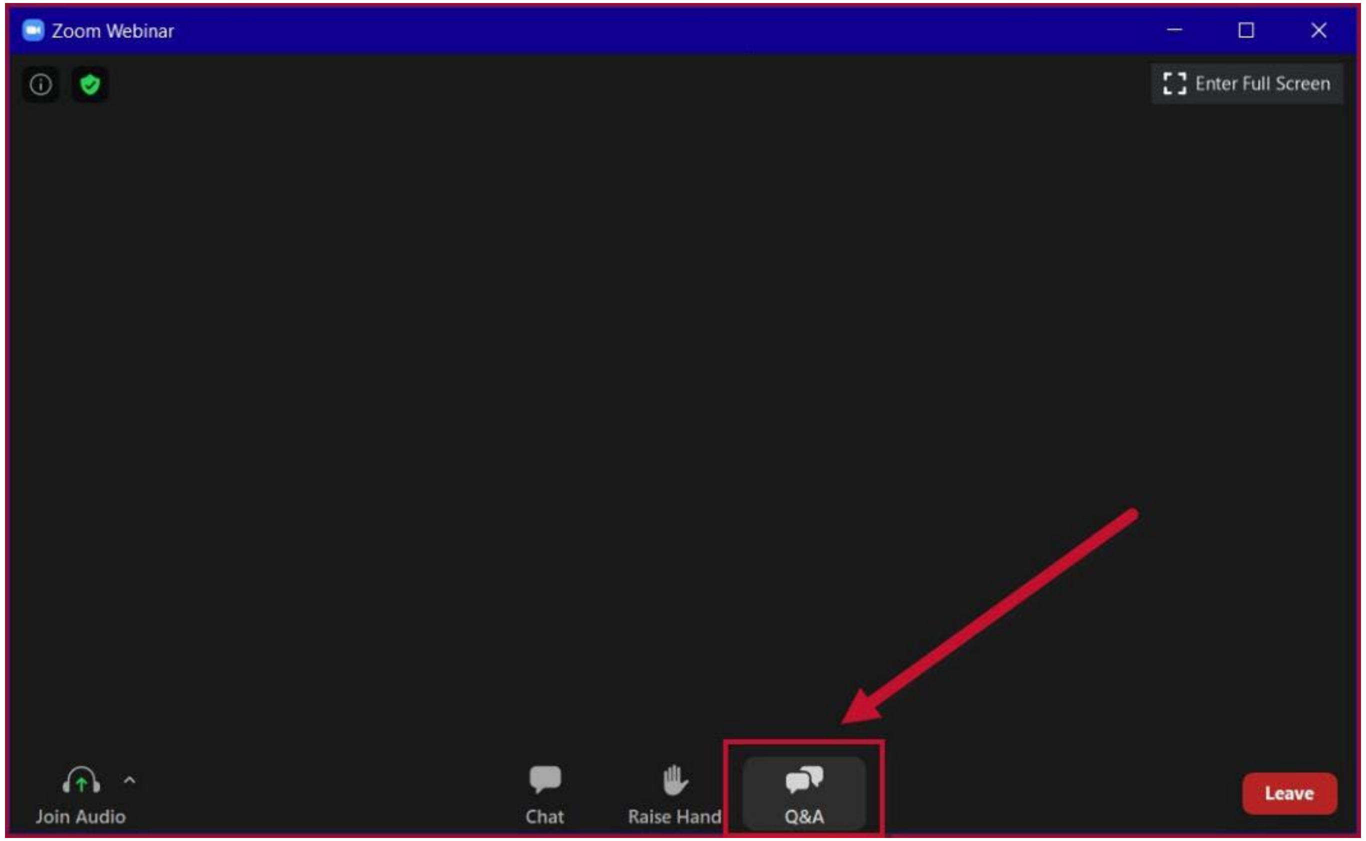
Slovakia:
CEE Automotive Supply Chain
Žilina | 2-4 Nov | Supply chain

Poll 3

Do you feel SMMT is doing a good job supporting the industry?

Questions and Answers

Please click on Q&A and type in your questions.



Email: **memberservices@smmt.co.uk** with your questions after this session.

Thank you

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