



Freedonia Focus Reports
Global Collection

Hybrid & Electric Vehicles: United Kingdom

May 2018



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

| | |
|--|-----------|
| 1. Highlights | 3 |
| 2. Market Environment | 4 |
| Historical Trends | 4 |
| Key Economic Indicators | 6 |
| Hybrid & Electric Powertrains | 7 |
| Environmental & Regulatory Factors | 9 |
| 3. Segmentation & Forecasts | 11 |
| Products | 11 |
| Full Hybrid | 13 |
| Plug-In Hybrid | 13 |
| Battery Electric | 14 |
| Fuel Cell Electric | 14 |
| Markets | 16 |
| Light Vehicles | 17 |
| Medium- & Heavy-Duty Vehicles | 18 |
| 4. Industry Structure | 19 |
| Industry Characteristics | 19 |
| Market Leaders | 20 |
| BMW | 20 |
| Nissan | 21 |
| Toyota | 21 |
| 5. About This Report | 23 |
| Scope & Method | 23 |
| Sources | 24 |
| Industry Codes | 24 |
| Resources | 25 |

List of Tables & Figures

| | |
|---|----|
| Figure 1 UK: Key Trends in Hybrid & Electric Vehicle Demand, 2017 – 2022 | 3 |
| Figure 2 UK: Hybrid & Electric Vehicle Demand Trends, 2007 – 2017 | 4 |
| Table 1 UK: Key Indicators for Hybrid & Electric Vehicle Demand, 2012 – 2027 | 6 |
| Table 2 Comparison of Hybrid & Electric Vehicle Powertrain Types | 8 |
| Figure 3 UK: Hybrid & Electric Vehicle Demand by Product, 2012 – 2027 (000 units) | 11 |
| Table 3 UK: Hybrid & Electric Vehicle Demand by Product, 2012 – 2027 (000 units) | 11 |
| Table 4 UK: Hybrid & Electric Vehicle Supply & Demand, 2012 – 2027 (000 units) | 13 |
| Figure 4 UK: Hybrid & Electric Vehicle Demand by Product, 2012 – 2027 (%) | 15 |
| Figure 5 UK: Hybrid & Electric Vehicle Demand by Market, 2012 – 2027 (000 units) | 16 |
| Table 5 UK: Hybrid & Electric Vehicle Demand by Market, 2012 – 2027 (000 units) | 16 |
| Figure 6 UK: Hybrid & Electric Vehicle Demand by Market, 2012 – 2027 (%) | 18 |
| Table 6 Selected Suppliers to the UK Hybrid & Electric Vehicle Market | 20 |
| Table 7 HS Codes Related to Hybrid & Electric Vehicles | 24 |

About This Report

Scope & Method

This report forecasts to 2022 and 2027 hybrid and electric vehicle (HEV) demand and production in units in the UK. Total demand is segmented by product in terms of:

- full hybrid
- plug-in hybrid
- battery electric
- fuel cell electric

Total demand is also segmented by market as follows:

- light vehicles
- medium- and heavy-duty vehicles

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; production and the various segments are reported at five-year intervals for 2012 and 2017.

Excluded from the scope of this report are micro hybrids, in which vehicle propulsion is generated from an internal combustion engine, but some technological features found in hybrid vehicles – specifically start-stop systems – are used to improve fuel economy. However, because these vehicles do not use an electric motor for propulsion, they fall outside the scope of this report.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Hybrid & Electric Vehicles: United Kingdom (FB85023) is based on [Global Hybrid & Electric Vehicles](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Hybrid & Electric Vehicles

| HS Code | Definition |
|---------|---|
| 870340 | Vehicles; with both spark-ignition internal combustion reciprocating piston engine and electric motor for propulsion, incapable of being charged by plugging to external source of electric power |
| 870350 | Vehicles; with both compression-ignition internal combustion piston engine (diesel or semi-diesel) and electric motor for propulsion, incapable of being charged by plugging to external source of electric power |
| 870360 | Vehicles; with both spark-ignition internal combustion reciprocating piston engine and electric motor for propulsion, capable of being charged by plugging to external source of electric power |
| 870370 | Vehicles; with both compression-ignition internal combustion piston engine (diesel or semi-diesel) and electric motor for propulsion, capable of being charged by plugging to external source of electric power |
| 870380 | Vehicles; with only electric motor for propulsion |

Source: United Nations Statistics Division

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Hybrid & Electric Vehicles, May 2018

Freedonia Industry Studies

Global Batteries, June 2018

Global Motorcycles, May 2018

Automotive Lubricants Market in the UK, February 2018

Global Automotive Lubricants, December 2017

Global Bus Market, May 2017

Global Diesel Engines Market, January 2017

Freedonia Focus Reports

Automotive Lubricants: United Kingdom

Automotive Repair & Maintenance Services: United States

Energy: United States

Global Batteries

Global Buses

Global Light Vehicles

Global Medium- & Heavy-Duty Vehicles

Motorcycles: Canada

Transport Equipment: United States

World Diesel Engines

Freedonia Custom Research

Trade Publications

Automotive Industries

Automotive News

CleanTechnica

EV World

Green Car Congress

Green Car Reports

HybridCars.com

Ward's AutoWorld

Agencies & Associations

Alliance of Automobile Manufacturers

Electric Drive Transportation Association

Electric Vehicle Society

European Alternative Fuels Observatory

About This Report

European Automobile Manufacturers Association

European Commission

Eurostat

International Council on Clean Transportation

International Energy Agency

Plug'n Drive

United Nations Comtrade