

United Kingdom Autos Report Q4 2016

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Abstracts

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BMI View: The UK's decision to exit the EU will lead to a fall in passenger car demand in 2016 and 2017 through its negative impact on consumer and business confidence by raising economic uncertainty and through vehicle price inflation created by the resulting depreciation in the pound.

Key Views

Prior to the UK's decision to exit the EU, the passenger car market had already become overheated with sales reaching record highs and an overreliance on purchases made on credit. The exit will now bring these problems to a head in 2016 and 2017.

Vehicle production forecast remains unchanged after Brexit as producers continue to gain from export growth to recovering EU region over the next two years and as large capacity increases at Nissan and Honda Motor provide a lot of the support to growth.

Despite our decision to maintain our current production forecast, from 2018 onwards risks to the production outlook are heavily weighted to the downside as trade rules governing the costs of exporting to the EU are renegotiated and imposed.

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