# Industry voices: Shaping the future of advanced manufacturing

**19 March 2026**
**09:00-15:00**

**Coventry**

UKRI Innovate UK

# AGENDA

| | | |
|---|---|---|
| 9.30 | HVMC welcome | Joe Darlington, MTC |
| 9.35 | Aligning government investment to Industrial Strategy<br>Updates on recent and future competitions | Paul Gadd, Innovate UK<br>Heather Birch, Innovate UK |
| 9.50 | Manufacturing Segmentation: Evidence of Opportunities and Strengths | David Leal Ayala, Cambridge Industrial Innovation Policy |
| 10.10 | Workshop 1 – Technology priorities | |
| 11.10 | Refreshment and networking break | |
| 11.40 | Workshop 2 – Barriers | |
| 12.40 | Lunch | |
| 1.40 | Overview of the Catapult network | Bhavnita Patel, MTC |
| 1.50 | Opportunities for UK supply chain | Andrew Mansfield, SMMT |
| 2.00 | Workshop 3 – UK Capabilities and Interventions | |
| 2.50 | Innovate UK – Summary and next steps | |
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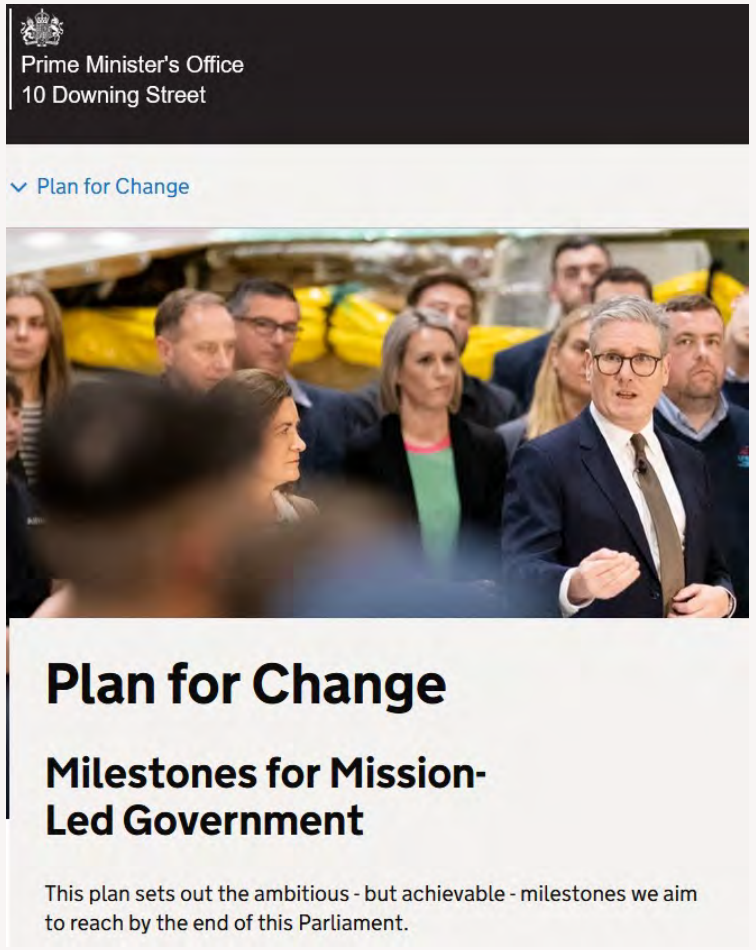
# Government Missions




- **Raising living standards in every part of the United Kingdom**, so working people have more money in their pocket as we aim to deliver the highest sustained growth in the G7.
- **Building 1.5 million homes in England and fast-tracking planning decisions** on at least 150 major economic infrastructure projects - more than the last 14 years combined.
- **Ending hospital backlogs** to meet the NHS standard of 92% of patients in England waiting no longer than 18 weeks for elective treatment.
- **Putting police back on the beat** with a named officer for every neighbourhood, and 13,000 additional officers, PCSOs and special constables in neighbourhood roles in England and Wales.
- **Giving children the best start in life**, with a record 75% of 5-year-olds in England ready to learn when they start school.
- **Securing home-grown energy**, protecting billpayers, and putting us on track to at least 95% clean power by 2030, while accelerating the UK to net zero.

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https://www.gov.uk/missions

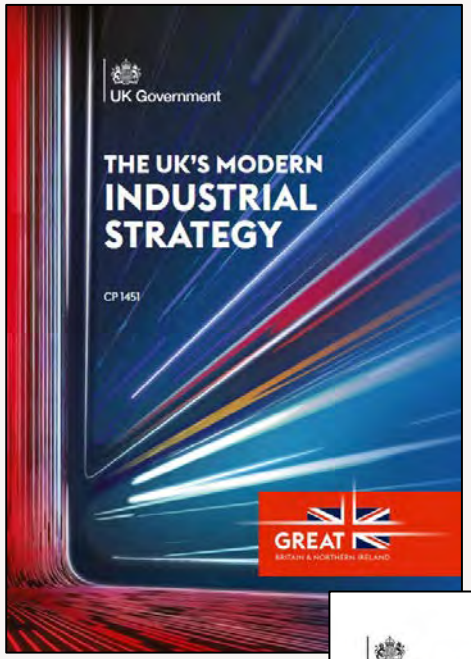
# Industrial Strategy

**Industrial Strategy (June 2025)**

- Strategy document setting out a new economic approach to backing the UK's strengths, with ambitious plans for 8 high-growth sectors

**Advanced Manufacturing Sector Plan (June 2025)**

- The plan to increase investment and growth in Advanced Manufacturing, as part of the UK's Modern Industrial Strategy.
- Prioritises six frontier industries with the highest growth potential and where UK businesses have a comparative advantage globally





**Advanced Manufacturing**

- Aerospace
- Advanced Materials
- Agri-tech
- Automotive
- Batteries
- Space

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# UKRI Alignment to Industrial Strategy

UKRI mission to:
- Advance knowledge
- Improve lives
- Drive growth

**UKRI budgets (December 2025)**
- Budgets published for Apr 26 – Mar 30
  - Curiosity-driven, foundational research
  - Strategic government and societal priorities
  - Supporting innovative companies

- Government priorities and innovative companies aligned to IS-8
  - Dedicated budgets for Advanced Manufacturing
  - Focus on frontier 6 industries

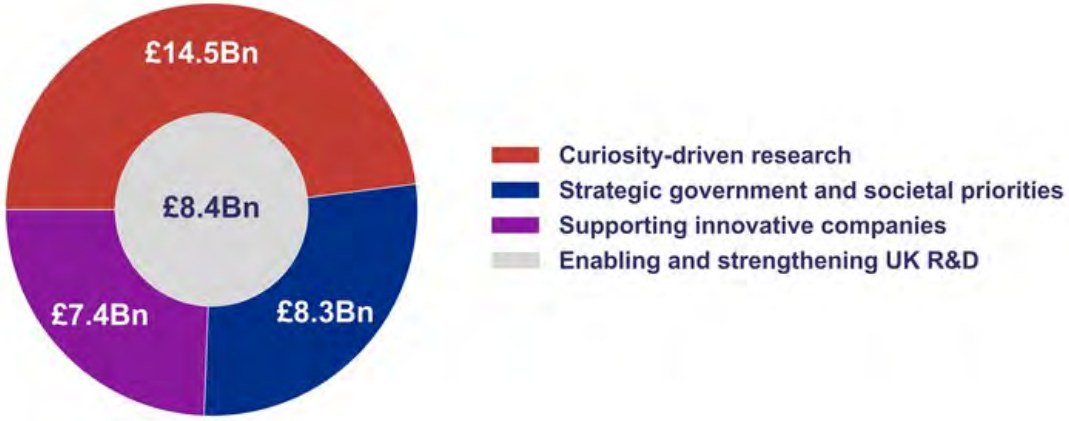


**Table 2: Targeted investment in Industrial Strategy growth sectors across priority buckets**

| Sector | Strategic government and societal priorities (SR total in millions) | Supporting innovative companies (SR total in millions) | Combined investment (SR total in millions) |
|---|---|---|---|
| Advanced Manufacturing | 353 | 983 | 1,336 |

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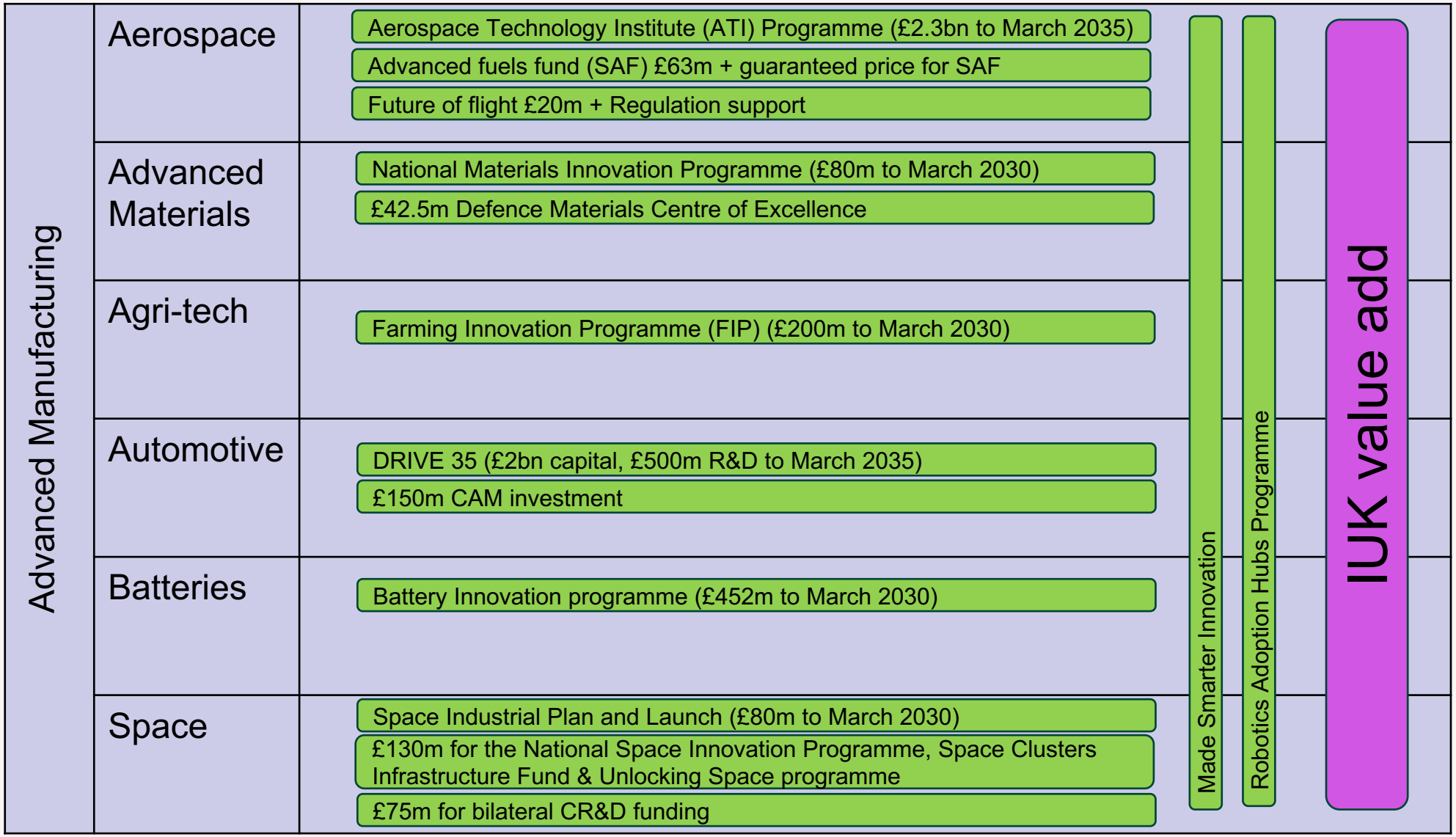
# Adv Man Landscape



# Focus

**Shaping IUK plans**

- Add most value supporting cross cutting technologies that can be applied to multiple frontier industries
- Aim to target a few areas with
  - Highest growth potential
  - Aligned to UK strengths

- Using several inputs to inform selection
  - IfM study – more on this shortly
  - Inputs from government teams including supply chain centre and science power index
  - Voices of manufacturers – today!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# Voice of the Customer Workshop

Where you see the key innovation opportunities across the six frontier industries

- The potential size of future markets, and the evidence or trends that support this
  - Opportunities with clear market pull (UK, EU, global), export potential, and contribution to net zero and resilience

- How well UK companies are positioned to capitalise on these opportunities
  - Where are we STRONG e.g. World class R&D base, leading market share / companies, strong cluster potential.
  - Prioritise where UK capabilities and clusters already exist or can be built at speed

- What are the key barriers and what catalysts are needed to unlock investment & growth

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# Voice of the Customer Workshop

**How your input will be used:**

- To shape the future Innovate UK calls (themes/areas & barriers addressed)
- To inform the UKRI Advanced Manufacturing programme
- To inform Sector Plan implementation, Industrial Strategy roadmaps and related programmes (e.g. Made Smarter, Robotics hubs, Supply Chain Centre)

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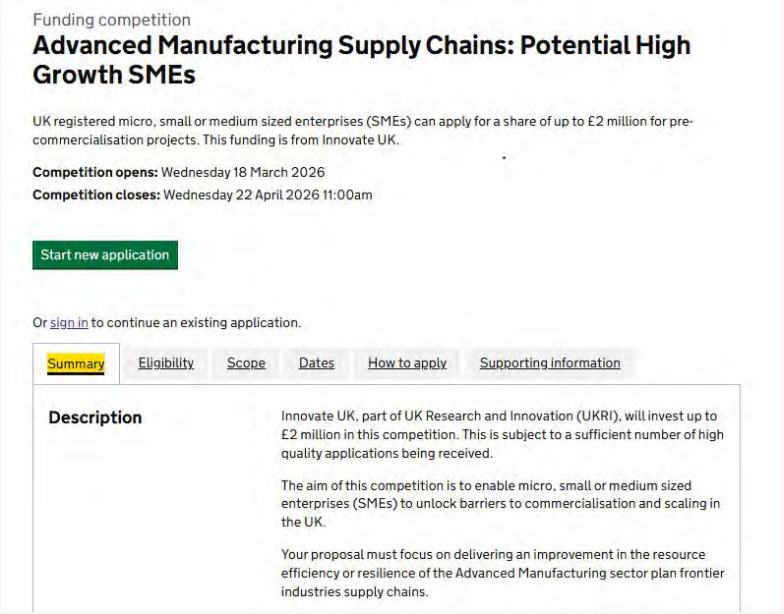
# Recent and Current Competitions

Innovate UK is developing programmes to support the government's **Industrial Strategy and Advanced Manufacturing Sector Plan, with a focus on the six frontier industries**.

Initial funding has already been made available through:

- **£5 million Advanced Manufacturing Supply Chain Innovation Feasibility Studies competition**
  Closed 11 March 2026
  **434 applications submitted**

- **£2 million Advanced Manufacturing Supply Chains: Potential High Growth SMEs competition**
  **Opened** 18 March 2026
  **Closes** 22 April 2026 11:00am [LINK]


Funding competition

**Advanced Manufacturing Supply Chains: Potential High Growth SMEs**

UK registered micro, small or medium sized enterprises (SMEs) can apply for a share of up to £2 million for pre-commercialisation projects. This funding is from Innovate UK.

**Competition opens:** Wednesday 18 March 2026
**Competition closes:** Wednesday 22 April 2026 11:00am

Start new application

Or sign in to continue an existing application.

Summary | Eligibility | Scope | Dates | How to apply | Supporting information

**Description**

Innovate UK, part of UK Research and Innovation (UKRI), will invest up to £2 million in this competition. This is subject to a sufficient number of high quality applications being received.

The aim of this competition is to enable micro, small or medium sized enterprises (SMEs) to unlock barriers to commercialisation and scaling in the UK.

Your proposal must focus on delivering an improvement in the resource efficiency or resilience of the Advanced Manufacturing sector plan frontier industries supply chains.

**Building on these, Innovate UK is developing further funding calls and exploring how to focus their scope to target areas with the greatest growth potential, aligned with the UK's existing capabilities.**

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# Manufacturing Segmentation:
## Evidence of Opportunities and Strengths

A project for UKRI – Innovate UK

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Zoi Roupakia zoi.roupakia@noeticai.co

Draft – not for circulation



## Presentation overview

1. Context, aims and objectives
2. Approach and data sources
3. Long-list of 20 cross-cutting manufacturing technologies
4. Shortlist: Tier 1 and Tier 2 findings

Q Questions and answers

# (1) Why this study? What are we trying to answer?

### The policy challenge

The UK Industrial Strategy identifies Advanced Manufacturing as one of eight growth sectors. The Advanced Manufacturing Sector Plan commits to cross-cutting manufacturing technologies — but which ones, and where should Innovate UK invest?

### The analytical gap

Existing technology priority lists are either sector-specific or insufficiently evidenced. There is no systematic, data-driven segmentation of cross-cutting manufacturing technologies by opportunity and UK feasibility.

### The answer this study provides

A structured, evidence-based ranking of cross-cutting horizontal manufacturing technologies — where global market opportunity and UK innovation capability are strongest, and where Innovate UK investment has greatest additionality.



## PROJECT OBJECTIVES

1. Identify and classify cross-cutting manufacturing technologies
2. Prioritise using a transparent multi-criteria decision analysis (MCDA) framework (Opportunity × Feasibility)
3. Stress-test under 4 weighting scenarios to find robust priorities
4. Provide Innovate UK with structured input for programme and investment decisions

# Scope: what qualifies as a cross-cutting manufacturing technology?

*A technology that enhances manufacturing capability across multiple sectors simultaneously — operating at the level of processes, platforms or enabling capabilities rather than as a single-sector end-product.*

| 1 Multi-sector applicability | 2 System-level improvement | 3 Functional role in manufacturing | 4 Within Innovate UK's sphere |
|---|---|---|---|
| Contributes to manufacturing capability across ≥ 3 distinct manufacturing sectors, evidenced by trade data, patent sector coverage or literature. | Primary value arises from improvements to productivity, quality, efficiency, sustainability or resilience — not tied exclusively to a single end-product. | Operates as a process, platform, system or enabling capability.. | A plausible mechanism exists by which Innovate UK instruments — grants, challenge funds, Catapult activity, supply chain support — can accelerate development or adoption. |



*Technologies that describe a specific industrial sector or single-product application were excluded or reframed to focus on the underpinning cross-cutting manufacturing process technologies.*

# Limitations: key analytical challenges

"Identify the **critical** manufacturing technologies that will **underpin** manufacturing industries for the next 5-10 years"

1. **The impacts of cross-cutting technologies are diffuse**, emerging through productivity gains, efficiency improvements and resilience across multiple supply chains rather than as measurable outputs in a single sector.

2. **Existing datasets and industrial classifications were not designed to capture these cross-cutting activities.**
   - Emerging technologies like AI, robotics and additive manufacturing are coded inconsistently across classification systems, limiting comparability and hiding their aggregate economic value.
   - Patent or investment indicators, while useful, provide only partial insight into commercial deployment or competitive strength.

3. Technology reports consider **different lists of technologies with a different level of granularity** and rely on different tools and evidence.

# Three independent evidence streams feeding one MCDA framework

**A — Market Pull**

**International trade data:** global demand growth, UK global export share, UK import dependency

**B — Technology Push and UK Innovation Ecosystem**

**Innovation data:** global patents, UK patents, scientific publications, gross business R&D expenditure, world's top 2,000 corporate R&D investors, spinout count, UK innovation infrastructure coverage.

**D — Policy Pull**

**National policies, strategies and funding priorities:** 22 UK + 21 international policy documents.

## Multi-criteria decision analysis (MCDA)

*8 criteria · 2 dimensions · 1–5 scoring*

**OPPORTUNITY**

- O1 Industrial Competitiveness
- O2 Strategic Importance & Industrial Strategy Alignment
- O3 Market Opportunity & Growth
- O4 Spillover & System Effects

**FEASIBILITY**

- F1 UK Technological Capability
- F2 Commercialisation Readiness
- F3 Innovation Infrastructure
- F4 Time to Impact & Competitive Window

# Twenty cross-cutting manufacturing technologies: the long-list

| | | | |
|---|---|---|---|
| 1 **Advanced Measurement, Sensing & Instrumentation** *Enabling* — T1 | 2 **Additive Manufacturing** *Process* — T1 | 3 **Advanced Robotics & Intelligent Automation** *Process* — T1 | 4 **Electricity Control, Power Electronics & Grid** *Product* — T1 |
| 5 **Digital Manufacturing & Industrial AI** *Enabling* — T1 | 6 **Propulsion & Gas Turbine Technologies** *Product* — T1 | 7 **Precision Biofabrication & Life Sciences Mfg** *Process* — T1 | 8 **Biomanufacturing & Advanced Biological Processing** *Process* — T1 |
| 9 **Industrial Decarbonisation & Circular Mfg** *Process* — T2 | 10 **Surface Engineering & Coating Technologies** *Process* — T4 | 11 **Advanced Materials & Metallurgy** *Product* — T3 | 12 **Systems Integration & Digital Twins** *Systems Eng.* — T2 |
| 13 **Handling, Lifting & Industrial Logistics** *Process* — T2 | 14 **Chemical Engineering & Separation Technologies** *Process* — T2 | 15 **Semiconductors & Advanced Electronics** *Product* — T3 | 16 **Transport Technology & Electromobility** *Product* — T2 |
| 17 **Optics, Photonics & Imaging Technologies** *Product* — T2 | 18 **Radar, Remote Sensing & Navigation** *Product* — T2 | 19 **Quantum Technologies** *Enabling* — T3 | 20 **Nanotechnology & Micro-Fabrication** *Enabling* — T4 |



T1 — Scale & Strengthen  T2 — Develop & Support  T3 — Selective Priority  T4 — Monitor

# How each technology relates to manufacturing?

## Enabling Technologies

*Foundational capabilities that underpin all other technology fields. Value is economy-wide rather than sector-specific.*

- ❑ Advanced Measurement, Sensing & Instrumentation
- ❑ Digital Manufacturing & Industrial AI
- ❑ Quantum Technologies
- ❑ Nanotechnology & Micro-Fabrication

n=4

## Process Technologies

*Methods and systems that transform materials into products or manage and control manufacturing operations.*

- ❑ Additive Manufacturing
- ❑ Advanced Robotics & Intelligent Automation
- ❑ Precision Biofabrication & Life Sciences Mfg
- ❑ Biomanufacturing & Advanced Biological Processing
- ❑ Industrial Decarbonisation & Circular Mfg
- ❑ Surface Engineering & Coatings
- ❑ Industrial Handling & Logistics
- ❑ Chemical Engineering & Separation

n=8

## Systems Engineering & Integration

*Technologies for integrating complex physical and digital systems across the full product lifecycle.*

- ❑ Systems Integration & Digital Twins

n=1

## Product Technologies

*Technologies whose primary value is embedded in a manufactured product, defining its core performance or functionality.*

- ❑ Electricity Control, Power Electronics & Grid
- ❑ Propulsion & Gas Turbine Technologies
- ❑ Advanced Materials & Metallurgy
- ❑ Semiconductors & Advanced Electronics
- ❑ Transport Technology & Electromobility
- ❑ Optics, Photonics & Imaging
- ❑ Radar, Remote Sensing & Navigation

n=7

# Tier 1 — Scale and Strengthen (total score ≥ 8.50)

### 1. Advanced Measurement, Sensing & Instrumentation ★

**9.75** Opp: 5.00 · Feas: 4.75

Max scores on all 8 criteria. World-class UK industrial base (Renishaw, NPL). Enabling prerequisite for every other technology field. Very High policy signal.

### 2. Additive Manufacturing ★

**9.25** Opp: 5.00 · Feas: 4.25

Maximum opportunity score. Global leader in metal AM (e.g. Renishaw). ~20% CAGR market. World-class infrastructure: AMRC, MTC, NCAM. All 8 peer countries endorse.

### 7. Precision Biofabrication & Life Sciences Mfg ★

**9.25** Opp: 4.75 · Feas: 4.50

Largest UK spinout sector (365 pharma/biotech). CGT Catapult. $799bn medical devices market by 2030. Strong across all scenarios including feasibility-led.

### 5. Digital Manufacturing & Industrial AI ★

**9.00** Opp: 5.00 · Feas: 4.00

Max opportunity: ~34% CAGR market, UK world-leading AI. All 8 peer countries endorse. Gap between research strength and manufacturing deployment.

### 3. Advanced Robotics & Intelligent Automation

**8.75** Opp: 5.00 · Feas: 3.75

Large opportunity ($47bn by 2030). Low UK robot density = adoption gap AND opportunity. National Robotarium, Bristol Robotics Lab. T2 under feasibility-led scenario.

### 8. Biomanufacturing & Advanced Biological Processing ★

**8.75** Opp: 4.25 · Feas: 4.50

NSI Act designation. Largest UK spinout sector. £10.2bn chemicals BERD. Robustly T1 across all 4 scenarios.

### 4. Electricity Control, Power Electronics & Grid

**8.50** Opp: 5.00 · Feas: 3.50

Structural EV/renewables demand. Newport compound semiconductor cluster. T2 under feasibility-led Scenario C (7.90).

### 6. Propulsion & Gas Turbine Technologies

**8.50** Opp: 4.00 · Feas: 4.50

Rolls-Royce world leader. £35bn+ aerospace exports. T2 under IS Alignment & Net Zero scenarios — O2 lower (aerospace-sector specific rather than cross-cutting).



*★ Robustly Tier 1 across all 4 weighting scenarios · Scenario A = balanced 50/50 Opportunity/Feasibility*

# Tier 2 — Develop and Support (score 7.50 – 8.49)

### 12. Systems Integration & Digital Twins

**8.25** Opp: 4.50 · Feas: 3.75

$259bn market at 33% CAGR. Reaches T1 under IS Alignment and Net Zero scenarios — systemic enabling value fully captured under those weightings.

### 14. Chemical Engineering & Separation Technologies

**8.00** Opp: 4.00 · Feas: 4.00

Meets all export/trade criteria simultaneously. IChemE HQ'd in London. £10.2bn chemicals BERD. Stable T2 across all 4 scenarios.

### 17. Optics, Photonics & Imaging Technologies

**8.00** Opp: 4.00 · Feas: 4.00

93% manufacturing exposure. UK outpaces global patent Optics CAGR. Newport compound photonics cluster. Stable T2 across all scenarios.

### 9. Industrial Decarbonisation & Circular Mfg

**7.75** Opp: 4.50 · Feas: 3.25

Net Zero structural driver. Rises under Scenario D. ITM Power, Ceres Power. Feasibility constrained by early-stage hydrogen manufacturing deployment.

### 13. Handling, Lifting & Industrial Logistics

**7.75** Opp: 3.75 · Feas: 4.00

Meets all export/trade criteria. Autonomous mobile robot adoption accelerating globally. Supply chain resilience at Very High UK policy signal. Consistent T2 across all scenarios.

### 18. Radar, Remote Sensing & Navigation

**7.75** Opp: 3.75 · Feas: 4.00

Leonardo DRS, BAE Systems, Thales UK, QinetiQ world-class. Strong defence export base. Defence Industrial Strategy Tier 1 endorsement. Stable T2 across all scenarios.

### 16. Transport Technology & Electromobility

**7.50** Opp: 4.25 · Feas: 3.25

EV sales 14m (2023) → 45m+ (2030). Advanced Propulsion Centre, Faraday Institution, AESC gigafactory. Feasibility constrained by battery cell import dependency. T3 under Scenario C.

# Robustly critical priorities and scenario-sensitive findings

**ROBUSTLY TIER 1 — Tier 1 in all 4 weighting scenarios (★)**

★ **1. Advanced Measurement, Sensing & Instrumentation**
A:9.75 B:9.85 C:9.65 D:9.80

★ **2. Additive Manufacturing**
A:9.25 B:9.55 C:8.95 D:9.40

★ **7. Precision Biofabrication & Life Sciences Mfg**
A:9.25 B:9.42 C:9.15 D:9.24

★ **5. Digital Manufacturing & Industrial AI**
A:9.00 B:9.40 C:8.60 D:9.20

★ **8. Biomanufacturing & Advanced Biological Processing**
A:8.75 B:8.86 C:8.85 D:8.76



*These 5 represent the highest-confidence — robust regardless of strategic weighting assumed.*

# Q&A

## Discussion points

- Questions on the approach?
- "Greatest opportunities for growth"
  - Any key technology fields missing? Justification
  - Priority areas? Justification
- Innovate UK role
  - Complementarity with existing efforts, where are the support gaps?
  - Are there any technology fields where Innovate UK should not intervene?
  - Best support mechanisms?

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# Thank you

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# Workshop sessions

Aim: to gather feedback and input aligned to cross-cutting technology areas

Exclude:
- Energy prices
- Carbon pricing
- Policy

Workshop 1 – Technology priorities

Workshop 2 – Barriers

Workshop 3 – UK strengths, capabilities. Posible interventions

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# Workshop 1 - Technology priorities

**What are the priorities for you and your customers in the next 5 years?**

1. As a potential supplier of technology – use your 5 stickers to indicate your priorities

2. As a potential customer of technology – use your other 5 stickers to indicate your priorities

3. Use post-it notes to add specific opportunities against these technology areas that you think are high priority

**At the end facilitators will show the priorities (30 secs each!)**

**You can view the sheets on different tables during the break**

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**Workshop 1**
Technology priorities

| Table label | |
|---|---|
| Facilitated by | |

| Technology | 1. Supply | 2. Demand | 3. What are the specific opportunities in these areas? |
|---|---|---|---|
| Measurement, Sensing and Instrumentation | | | |
| Additive Manufacturing | | | |
| Biofabrication and Life Sciences Manufacturing | | | |
| Digital Manufacturing and Industrial AI | | | |
| Robotics and Intelligent Automation | | | |
| Biomanufacturing | | | |
| Power Electronics and Grid | | | |
| Propulsion Technologies | | | |
| Systems Integration and Digital Twins | | | |
| Chemical Engineering and Separation | | | |
| Optics, Photonics and Imaging | | | |
| Industrial Decarbonisation | | | |
| Industrial Handling and Logistics | | | |
| Radar, Remote Sensing & Navigation | | | |
| Transport Technology and Electromobility | | | |
| Other (please state) | | | |

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# Workshop 2 - Barriers

**What are the barriers to widespread deployment and scale?**

1. Write on a post-it note the main barriers you believe prevent or slow widespread adoption and scale of technology in the next 5 years e.g.
   - Technical readiness
   - Skills
   - Regulations
   - Cost
   - Investment
   - Other

2. Which are most important? Where is there consensus? – Mark this on the post-it notes.

**At the end facilitators will show the priorities (30 secs each!)**

**You can view the sheets on different tables during the break**

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**Workshop 2**
Barriers

Table label:
Facilitated by:

| Technology | Ranking (from Workshop 1) | What are the barriers to widespread deployment and scale? Technical readiness / Skills / Regulations / Cost / Investment / Other |
|---|---|---|
| Measurement, Sensing and Instrumentation | | |
| Additive Manufacturing | | |
| Biofabrication and Life Sciences Manufacturing | | |
| Digital Manufacturing and Industrial AI | | |
| Robotics and Intelligent Automation | | |
| Biomanufacturing | | |
| Power Electronics and Grid | | |
| Propulsion Technologies | | |
| Systems Integration and Digital Twins | | |
| Chemical Engineering and Separation | | |
| Optics, Photonics and Imaging | | |
| Industrial Decarbonisation | | |
| Industrial Handling and Logistics | | |
| Radar, Remote Sensing & Navigation | | |
| Transport Technology and Electromobility | | |
| Other | | |

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UKRI Innovate UK

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CATAPULT
High Value Manufacturing

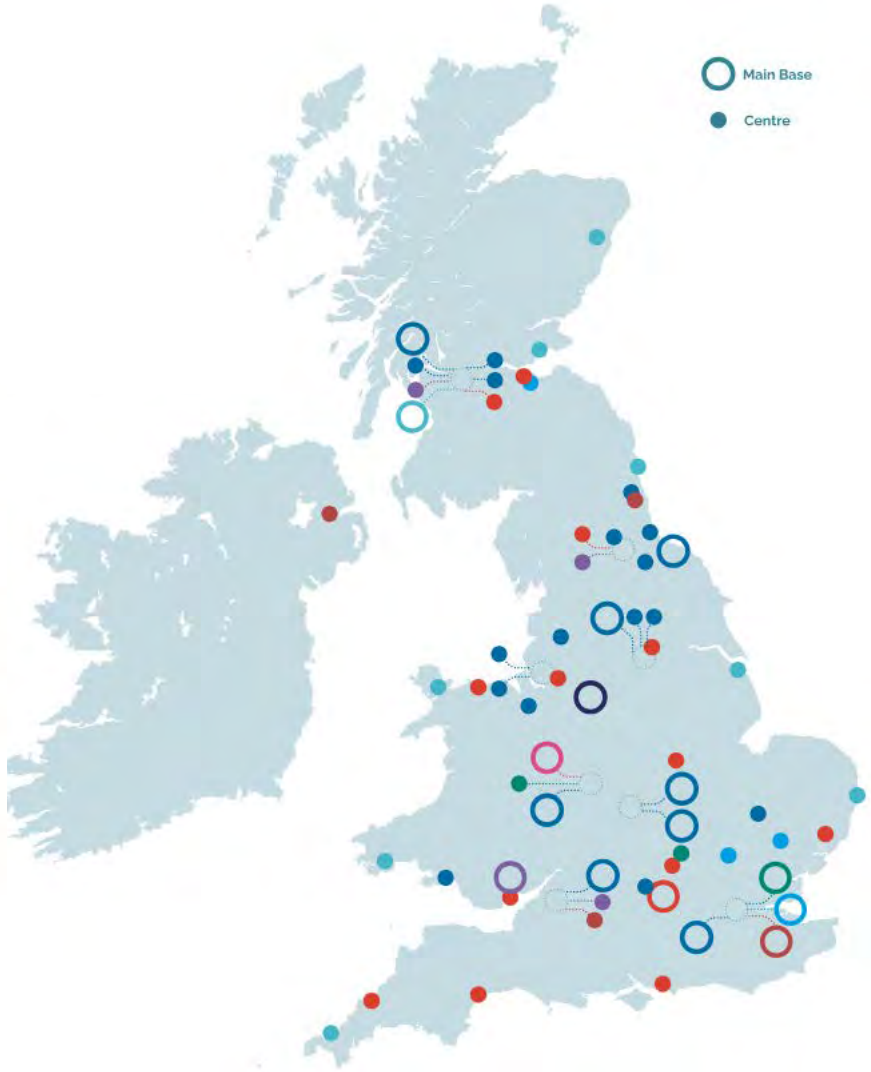
# INDUSTRIAL TRANSFORMATION FOR THE UK

DR BHAVNITA PATEL

University of Sheffield AMRC Advanced Manufacturing Research Centre
cpi
mtc where progress happens
ncc innovating for industry
NMIS National Manufacturing Institute Scotland
WMG THE UNIVERSITY OF WARWICK

# DRIVING GROWTH AND INNOVATION

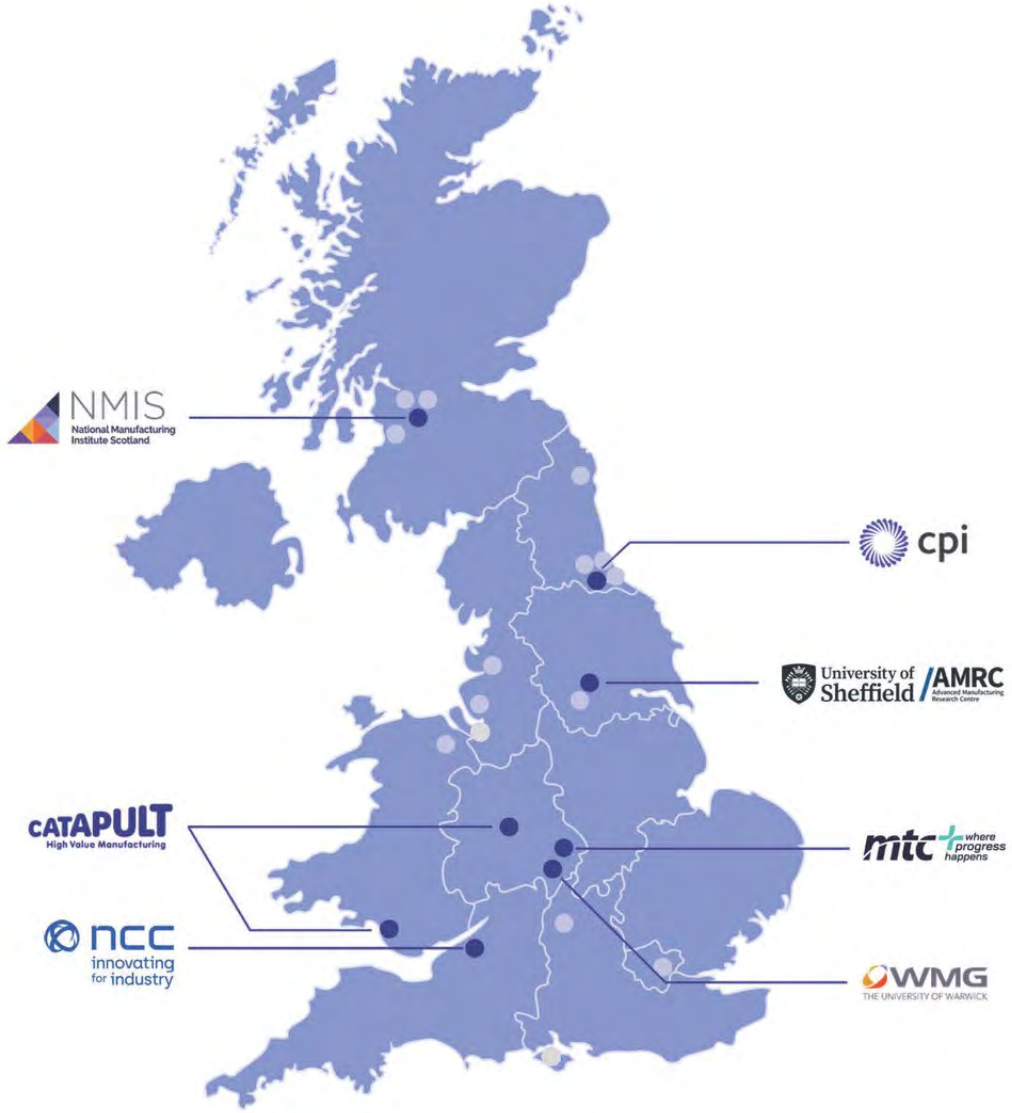
- CELL AND GENE THERAPY
- COMPOUND SEMICONDUCTOR APPLICATIONS
- CONNECTED PLACES
- DIGITAL
- ENERGY SYSTEMS
- HIGH VALUE MANUFACTURING
- MEDICINES DISCOVERY
- OFFSHORE RENEWABLE ENERGY
- SATELLITE APPLICATIONS



# TRANSFORMING UK INDUSTRY

"R&D is the very foundation of the breakthroughs that make our lives easier and healthier… Incredible and ambitious research goes on in every corner of our country."

Peter Kyle, Science & Technology Secretary



# THE POWER OF A CATAPULT

- Targeted research and development to tackle major engineering and manufacturing challenges
- Propelling great ideas through to commercial reality using public and private finance

**23,135**

SMEs worked with

**41,142**

Companies worked with

# OUR IMPACT

During 2024-2025, companies working with HVM Catapult have:

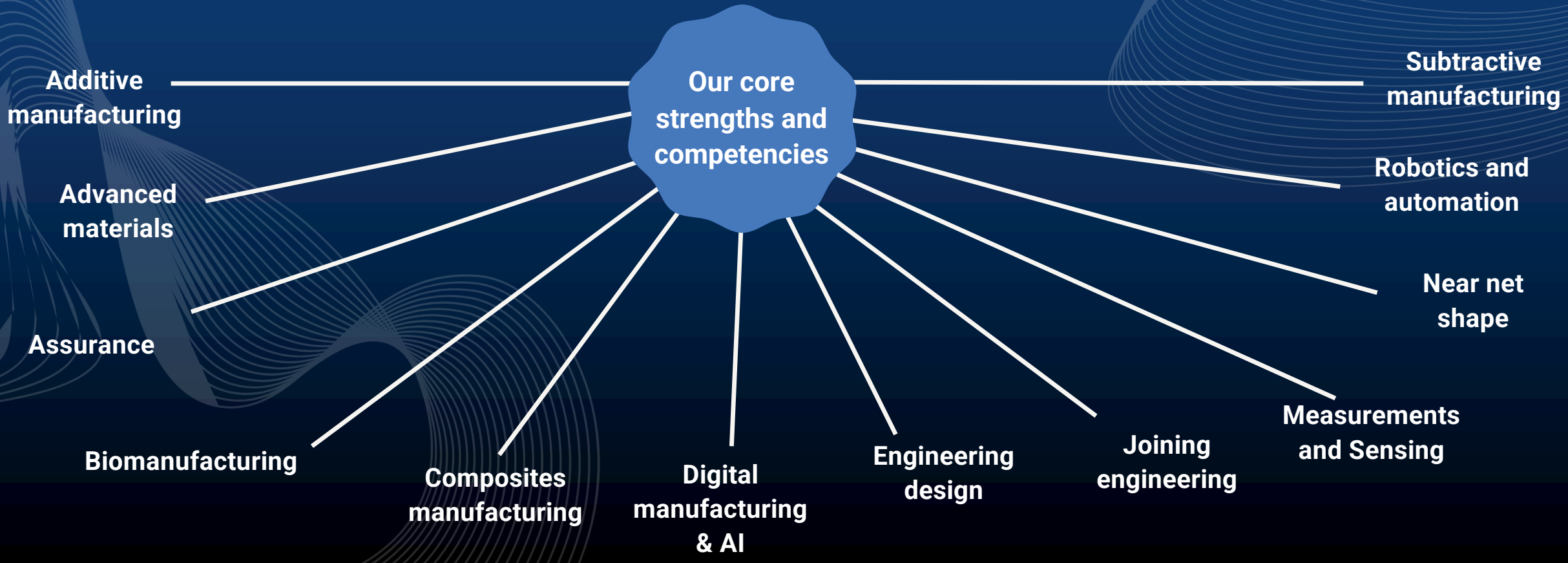
**£100m** invested in collaborative Research & Development

**£160m** secured in commercial funding

**£220m** raised in private investment

# TECHNOLOGY CAPABILITY

**HVM Catapult's unrivalled technical capabilities and expertise are a key enabler of our strategic priorities for UK manufacturing.** Technology capability roadmaps for each core capability are being developed. Alongside innovation priorities and the pathways to deliver them, they will form the basis of an HVM Catapult technology strategy.



# UK INDUSTRIAL TRANSFORMATION

## Our priorities for the Industrial Strategy

- A systems driven approach
- Develop skills
- Developing critical clean energy industries
- Securing high value industries
- Supply chain investment
- Increasing capabilities
- Enhancing manufacturing in defence
- Technology investment
- Innovation mechanisms
- Grow clusters

# DELIVERING THE INDUSTRIAL STRATEGY




Agri-tech


Automotive

Automation and Robotics

## ACCELERATING SCALE UP

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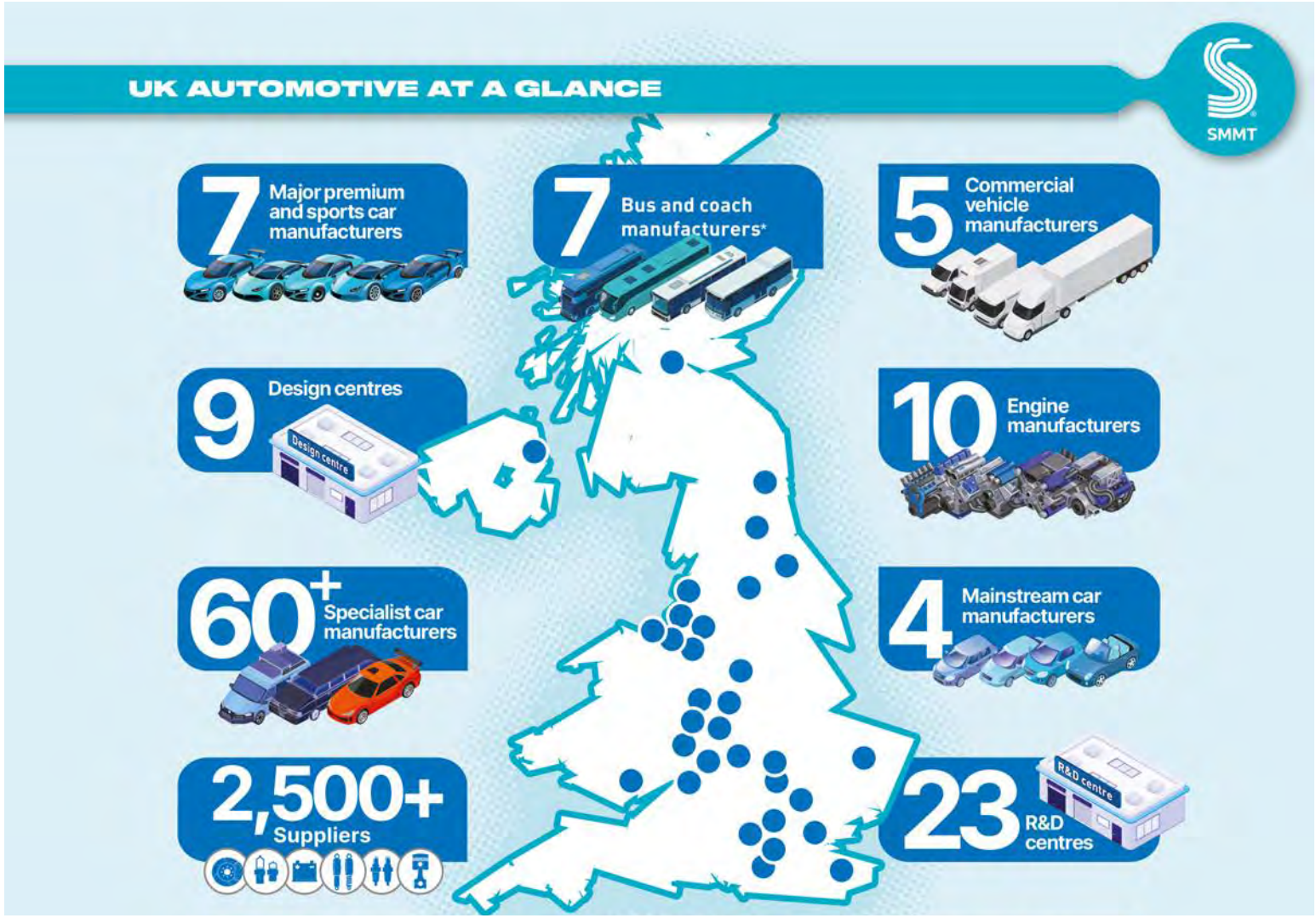
# UK Automotive Supply Chain Opportunities

Andrew Mansfield
Senior Supply Chain Manager
SMMT

# UK Automotive at a glance



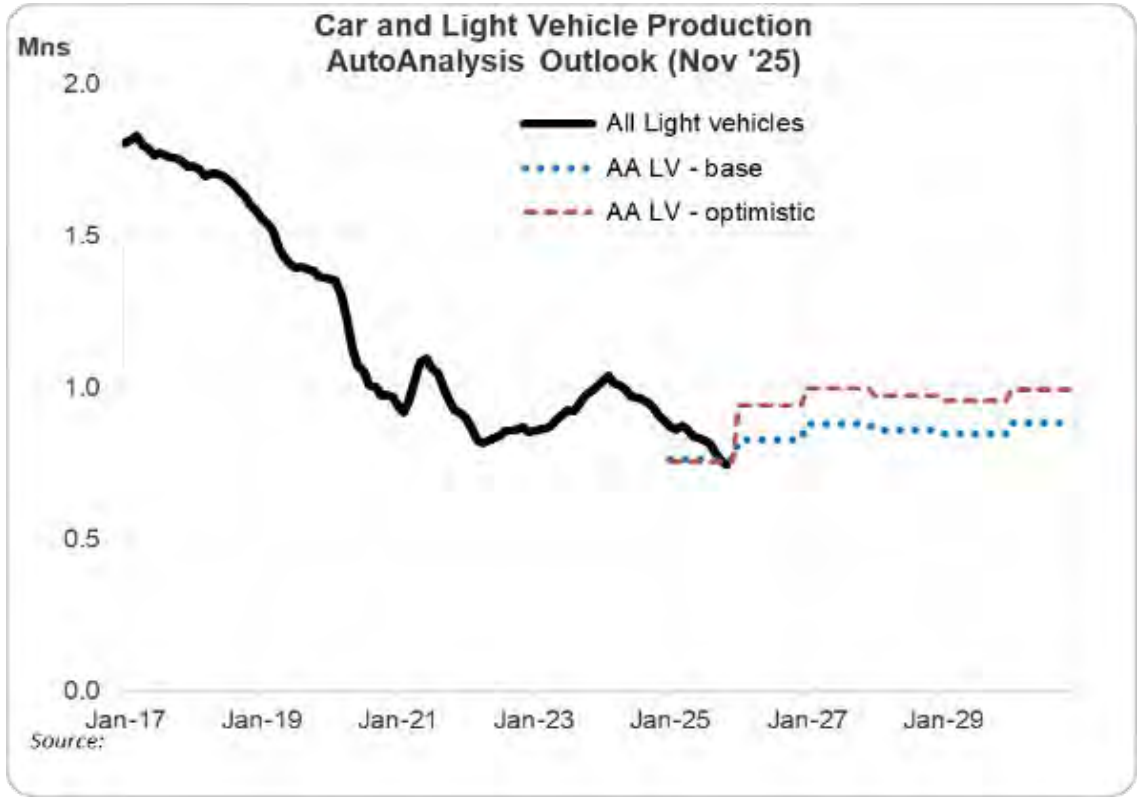

**717,371**
Cars built in 2025

**47,344**
Commercial vehicles built in 2025

**1,608,100**
Engines built in the UK 2025

# Market and production trends and outlook

## Production constrained, but expected to grow




| Vol/Share | Vehicle prod |
|---|---|
| 2024 actual | 905k |
| 2025 actual | 765k |
| 2026 Forecast | 848k |
| 2027 Forecast | 890k |

Source: AutoAnalysis for SMMT

# Technology Megatrends in Automotive

Electrification

Software Defined Vehicle (& electrical architecture)

Connected and Automated Technology

# The opportunity

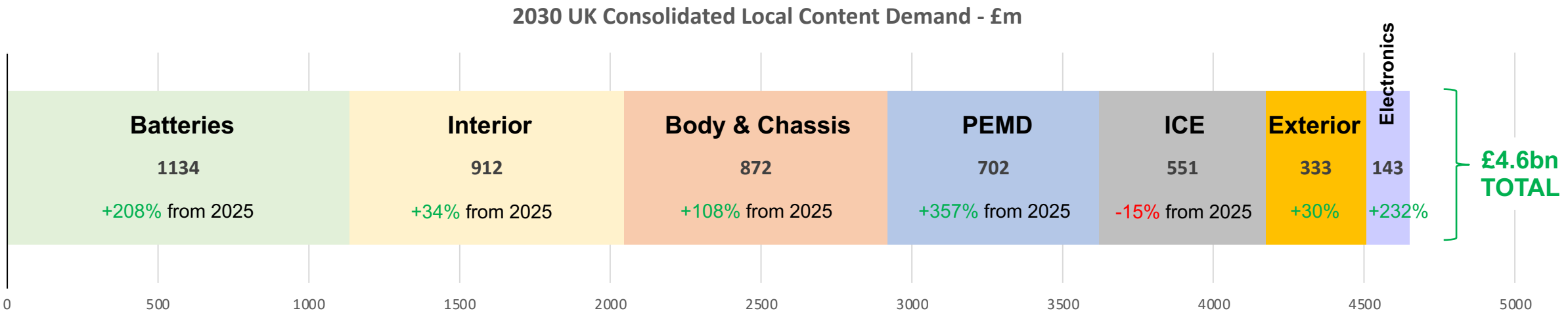
SMMT DRIVING THE MOTOR INDUSTRY

## £4.6 billion

Consolidated demand for UK local content by 2030

# UK Consolidated Local Demand

## £4.6bn opportunity for UK local content by 2030




| Batteries Top 3 £m | | Interior Top 3 £m | | B&C Top 3 £m | | PEMD Top 3 £m | | ICE Top 3 £m | | Exterior Top 3 £m | | Electronics Top 3 £m | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Battery packs | 567 | Seat assy/structure | 414 | Composite components | 79 | Hybrid transmissions | 202 | ICE & transmissions | 433 | Exterior plastics / trim | 275 | Wiring harness | 60 |
| Battery modules | 169 | Interior plastics / trim | 169 | Pressings and stampings | 78 | Motors | 196 | Exhaust and emission mgmt | 82 | Exterior lighting | 44 | Displays (inc HUD) | 55 |
| Cells | 108 | Cockpit Module | 190 | Braking systems | 64 | EDU | 139 | ICE cooling systems | 34 | Mirrors | 14 | Processing & computing units (e.g. ECU) | 23 |

# Supply Chain priorities 2026 – A focus on resilience

SMMT DRIVING THE MOTOR INDUSTRY

## 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

# UK Automotive Supply Chain Opportunities

## Summary

- **£4.6bn** consolidated opportunity in 2030 for UK local content
- **80% increase** from 2025 to 2030 driven by volume, EV transition and premium content / technology
- EV transition creating demand **opportunities across batteries and PEMD**
- Strong demand still remains in the UK for **local manufacturing for 'traditional' commodities** across interior, exterior, body and chassis, including interior plastics, exterior plastics, seat assembly and castings
- Automotive has **diversification** opportunities and capabilities

Andrew Mansfield
Senior Supply Chain Manager
amansfield@smmt.co.uk

**The Society of Motor Manufacturers and Traders Limited**
71 Great Peter Street, London SW1P 2BN
www.smmt.co.uk

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# Workshop 3 – UK strengths, capabilities. Possible interventions

**What are the UK strengths and capabilities in these areas? How might these be leveraged to overcome the barriers?**

1. Write on a post-it note the UK strengths and capabilities related to these technology areas e.g.
   - Infrastructure
   - Facilities
   - Programmes
   - Organisations

2. Write on a post-it note the possible interventions that you think might be transformative to encourage widespread adoption in the next 5 years

Innovate UK

Innovate UK

**Workshop 3**

UK strengths, capabilities. Possible interventions

Table label:

Facilitated by:

| Technology | UK Strengths & Capabilities<br>Infrastructure, Facilities, Programmes, Organisations, etc. | Possible interventions<br>How to leverage strengths and capabilities to overcome barriers |
|---|---|---|
| Measurement, Sensing and Instrumentation | | |
| Additive Manufacturing | | |
| Biofabrication and Life Sciences Manufacturing | | |
| Digital Manufacturing and Industrial AI | | |
| Robotics and Intelligent Automation | | |
| Biomanufacturing | | |
| Power Electronics and Grid | | |
| Propulsion Technologies | | |
| Systems Integration and Digital Twins | | |
| Chemical Engineering and Separation | | |
| Optics, Photonics and Imaging | | |
| Industrial Decarbonisation | | |
| Industrial Handling and Logistics | | |
| Radar, Remote Sensing & Navigation | | |
| Transport Technology and Electromobility | | |
| Other | | |

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# Summary & Next steps

We will:

- Gather and collate the results and report back
- Release a survey for individual input
- Use information to inform plans and programmes alongside other studies

THANK YOU

Innovate UK