



OTOMOTİV SANAYİİ DERNEĞİ
AUTOMOTIVE MANUFACTURERS ASSOCIATION

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU AĞUSTOS 2021

AUTOMOTIVE INDUSTRY MONTHLY REPORT
August 2021

	8 - 2020	8 - 2021	%	1 - 8 / 2020	1 - 8 / 2021	%	9/2019 - 8/2020	9/2020 - 8/2021	%
Otomobil Üretimi/P.Cars Production	45.211	59.539	31,7	485.314	511.766	5,5	857.734	881.495	2,8
Toplam Üretim/Total Production	75.342	106.748	41,7	712.101	814.520	14,4	1.252.202	1.400.297	11,8
Otomobil Pazarı/P.Cars Market	44.372	44.756	0,9	317.394	391.392	23,3	511.330	684.107	33,8
Toplam Pazar/Total Market	63.570	60.511	-4,8	414.876	522.244	25,9	660.692	903.518	36,8
Otomobil İthalatı/P.Cars Import	27.880	24.777	-11,1	193.634	233.370	20,5	313.552	400.186	27,6
Toplam İthalat/Total Import	34.828	32.442	-6,9	230.079	293.064	27,4	372.586	489.976	31,5
Otomobil İhracatı/P.Cars Export	26.393	42.346	60,4	360.118	365.704	1,6	662.366	602.202	-9,1
Toplam İhracat/Total Export	42.875	82.621	92,7	523.293	595.425	13,8	969.213	988.670	2,0
Otomobil İhracatı(\$)/P.Cars Export (\$)	381.569.430,64	623.110.772,88	63,3	5.407.645.449	6.001.639.307	11,0	9.866.160.486	9.906.082.192	0,4
Toplam İhracat(\$)/Total Export (\$)*	1.567.076.314,38	2.445.546.788,74	56,1	14.766.990.775	19.162.151.435	29,8	25.664.241.690	30.337.441.234	18,2

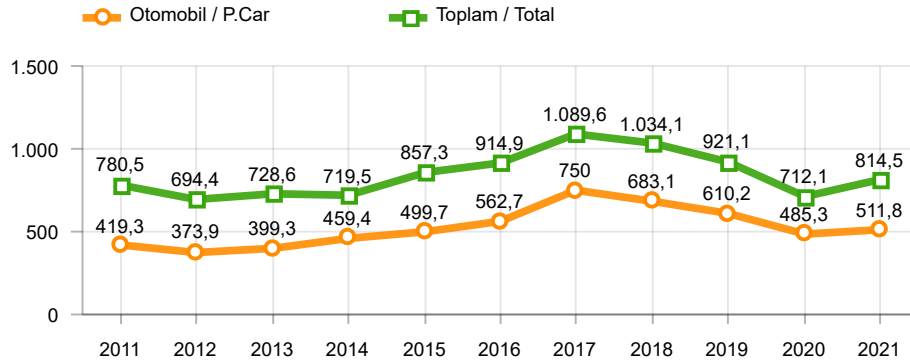
Parametreler/Parameters	8 - 2020	8 - 2021	%	1 - 8 / 2020	1 - 8 / 2021	%	9/2019 - 8/2020	9/2020 - 8/2021	%
ÜFE / PPI	2,4	2,8	-	10,5	28,5	-	6,7	31,3	-
TÜFE / CPI	0,9	1,1	-	7,3	11,7	-	11,3	15,8	-
Sanayi Endeksi / Industry Index	3,0	1,2	-	11,4	27,2	-	6,4	33,5	-
Dolar \$ ** (1 birim)	7,2	8,5	16,9	6,6	8,0	21,1	6,3	7,9	25,4
Euro € ** (1 birim)	8,6	10,0	16,4	7,4	9,6	29,8	7,1	9,5	34,5
Japon Yeni ¥ ** (100 birim)	6,8	7,7	12,8	6,1	7,4	20,2	5,8	7,4	26,1

*Toplam Sanayi / Total Industry Including Components

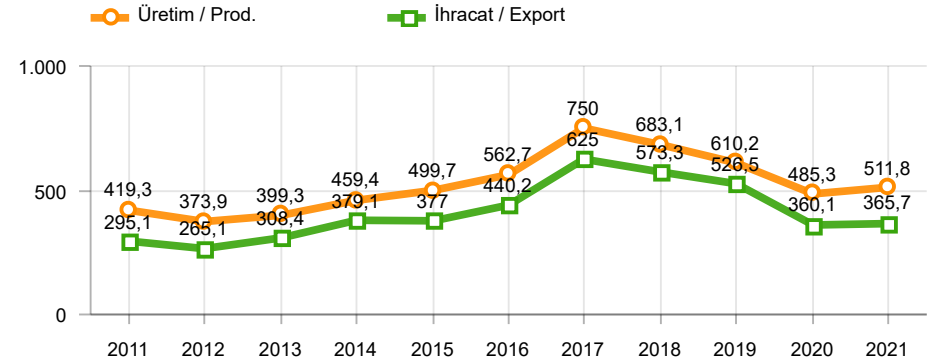
** Ortalama Değerler / Average Values

Araç Tipleri / Types	8 / 2020	8 / 2021	8 % Değişim	1-8 / 2020	1-8 / 2021	1-8 % Değişim
OTOMOBİL / Pass.Car	45.211	59.539	31,7	485.314	511.766	5,5
OTOMOBİL Toplam / Pass.Car Total	45.211	59.539	31,7	485.314	511.766	5,5
B.KAMYON / H. Truck	2.002	1.847	-7,7	11.041	19.811	79,4
K.KAMYON / L. Truck	111	496	346,8	888	2.641	197,4
KAMYONET / Pick Up	24.252	38.719	59,7	178.702	246.711	38,1
OTOBÜS / Bus	460	450	-2,2	5.014	3.568	-28,8
MİNİBÜS / Minibus	3.163	5.433	71,8	29.857	28.752	-3,7
MİDİBÜS / Midibus	143	264	84,6	1.285	1.271	-1,1
TİCARİ ARAÇLAR Toplam / Commercial Vehicles Total	30.131	47.209	56,7	226.787	302.754	33,5
TAŞIT ARAÇLARI Toplam / Motor Vehicles Total	75.342	106.748	41,7	712.101	814.520	14,4
TRAKTÖR / F.Tractor	2.968	3.041	2,5	19.803	36.291	83,3
TRAKTÖR Toplam / F.Tractor Total	2.968	3.041	2,5	19.803	36.291	83,3
GENEL TOPLAM / Grand Total	78.310	109.789	40,2	731.904	850.811	16,2

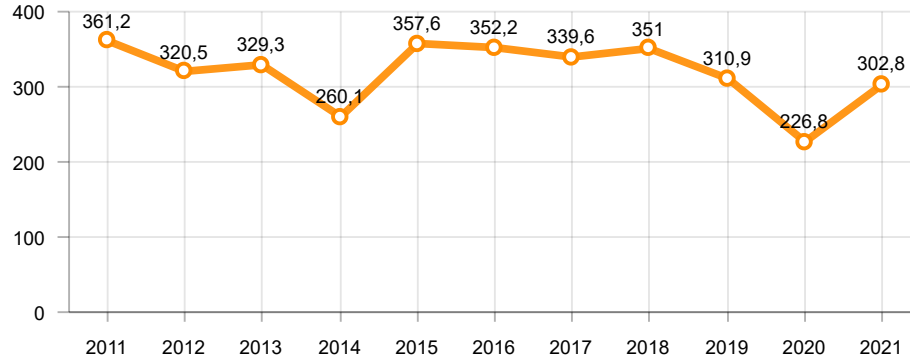
Toplam Üretim ve Otomobil Üretimi (x1000)(OCAK - AĞUSTOS)
Total & P.Cars Production (x1000)(January - August)



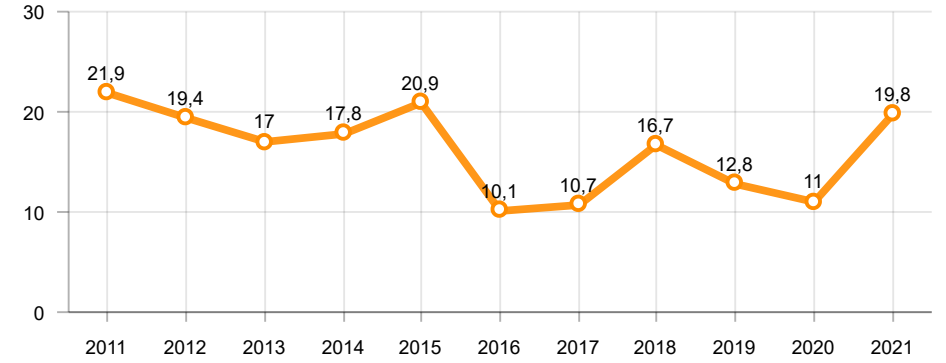
Otomobil Üretimi ve İhracat (x1000)(OCAK - AĞUSTOS)
P.Cars Production & Exports (x1000)(January - August)



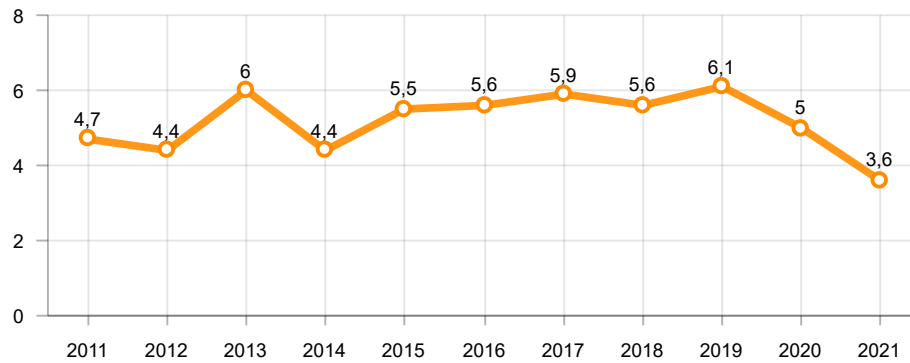
Ticari Araç Üretimi (x1000)(OCAK - AĞUSTOS)
Commercial Vehicle Production (x1000)(January - August)



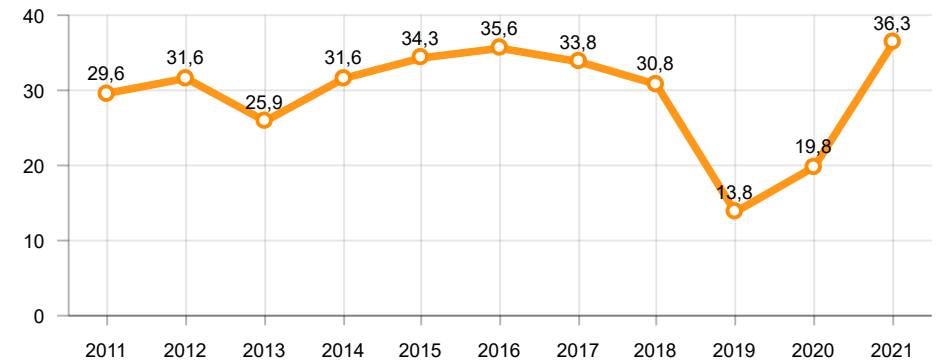
Büyük Kamyon Üretimi (x1000)(OCAK - AĞUSTOS)
Heavy Truck Production (x1000)(January - August)

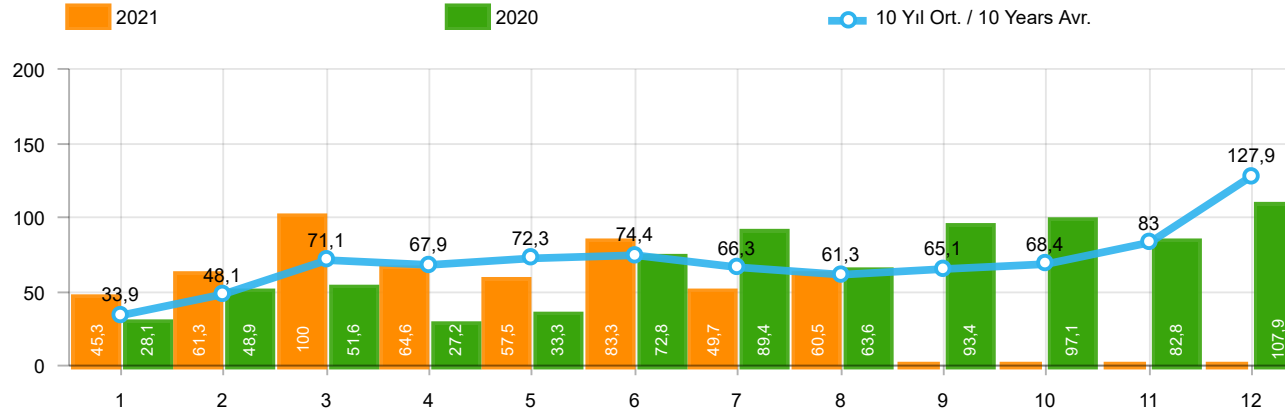


Otobüs Üretimi (x1000)(OCAK - AĞUSTOS)
Bus Production (x1000)(January - August)



Traktör Üretimi (x1000)(OCAK - AĞUSTOS)
F. Tractor Production (x1000)(January - August)

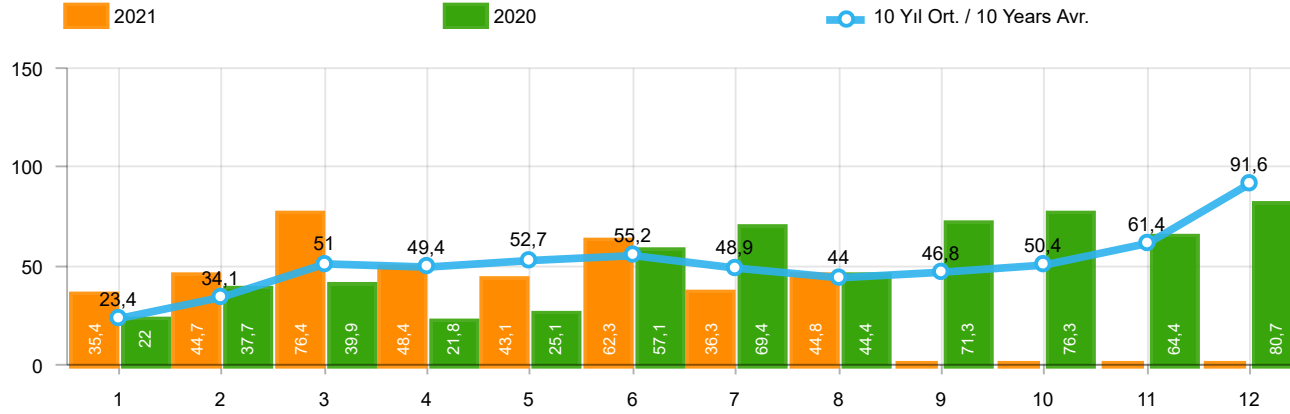




Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2021	%
1	33.938	45.308	33,5
2	48.144	61.325	27,4
3	71.122	100.046	40,7
4	67.887	64.551	-4,9
5	72.255	57.467	-20,5
6	74.447	83.304	11,9
7	66.289	49.732	-25,0
8	61.284	60.511	-1,3
TOPLAM/TOTAL	495.369	522.244	5,4

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	47.759	62.586	84.045	82.782	85.862	85.992	65.658	61.645	64.313	73.227	67.150	134.468	576.329	915.487	234.859	341.470	59,2
2012	31.552	44.138	69.242	66.559	75.195	75.108	65.444	60.982	73.501	62.933	75.203	121.442	488.220	821.299	184.713	303.507	62,2
2013	37.563	51.133	72.943	77.265	85.835	78.043	75.152	67.662	71.388	60.690	83.470	136.048	545.596	897.192	169.117	376.479	69,0
2014	34.751	37.659	51.312	57.113	62.447	64.295	62.770	63.303	70.764	69.742	84.368	154.843	433.650	813.367	144.307	289.343	66,7
2015	37.256	59.221	89.765	96.182	85.804	91.071	87.358	85.244	67.181	67.086	88.431	164.464	631.901	1.019.063	218.269	413.632	65,5
2016	34.369	54.840	85.932	87.748	97.090	94.666	59.732	73.654	69.413	85.666	125.462	145.706	588.031	1.014.278	190.691	397.340	67,6
2017	36.640	48.585	76.178	78.231	88.066	85.820	84.727	74.818	74.046	94.439	103.772	141.507	573.065	986.829	209.076	363.989	63,5
2018	36.525	48.768	79.600	73.886	74.996	52.788	54.194	35.137	23.915	22.321	59.406	80.014	455.894	641.550	174.385	281.509	61,7
2019	14.847	25.569	50.651	31.944	33.947	43.899	18.442	26.832	43.068	50.288	59.575	92.885	246.131	491.947	111.569	134.562	54,7
2020	28.123	48.948	51.554	27.165	33.308	72.789	89.419	63.570	93.406	97.125	82.824	107.919	414.876	796.150	184.797	230.079	55,5
2021	45.308	61.325	100.046	64.551	57.467	83.304	49.732	60.511					522.244	522.244	229.180	293.064	56,1

Otomobil Pazarının Analizi(x1000)(OCAK - AĞUSTOS)
P.Cars Market Analysis(x1000)(January - August)

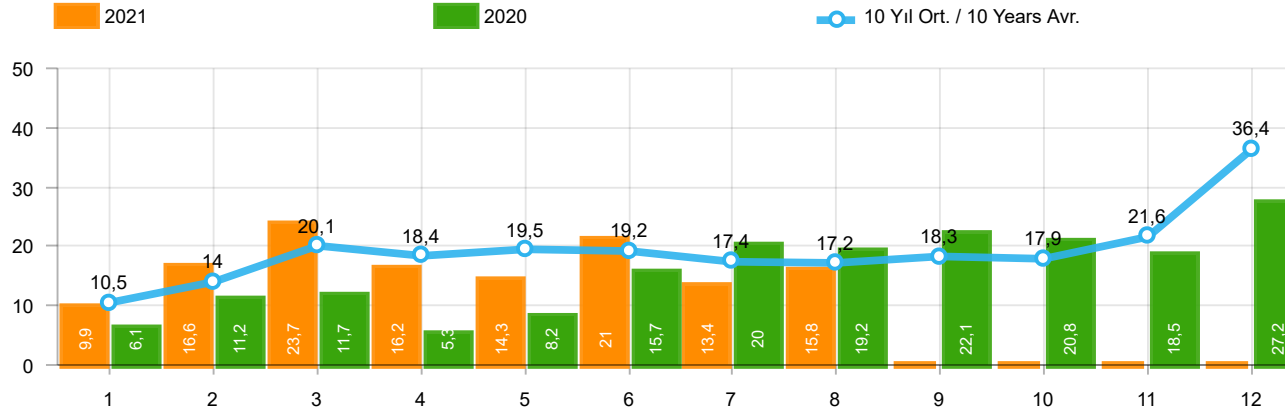


Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2021	%
1	23.430	35.358	50,9
2	34.107	44.749	31,2
3	51.047	76.357	49,6
4	49.442	48.375	-2,2
5	52.746	43.138	-18,2
6	55.249	62.348	12,8
7	48.938	36.311	-25,8
8	44.037	44.756	1,6
TOPLAM / TOTAL	358.996	391.392	9,0

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	29.868	39.004	54.023	53.835	56.302	56.714	43.518	38.875	39.964	47.508	44.951	88.957	372.139	593.519	116.121	256.018	68,8
2012	21.077	29.189	47.270	45.645	50.460	50.849	44.531	41.236	49.360	43.440	52.297	80.926	330.257	556.280	90.473	239.784	72,6
2013	25.835	36.814	51.785	56.999	62.383	58.290	55.712	51.611	52.925	46.985	64.117	101.199	399.429	664.655	86.633	312.796	78,3
2014	24.368	27.167	37.812	42.769	46.379	47.278	46.602	45.131	49.262	50.814	59.695	110.054	317.506	587.331	78.863	238.643	75,2
2015	24.498	40.817	61.676	70.211	62.878	67.766	64.218	61.753	47.088	47.954	62.397	114.340	453.817	725.596	114.025	339.792	74,9
2016	23.358	40.588	63.975	65.618	73.832	71.111	45.566	53.977	51.340	63.746	95.783	108.044	438.025	756.938	107.723	330.302	75,4
2017	25.689	34.658	55.616	57.998	65.799	66.164	62.384	54.890	53.423	70.488	75.956	99.694	423.198	722.759	129.160	294.038	69,5
2018	26.611	35.901	59.798	55.108	57.227	41.225	42.024	26.976	17.595	16.809	46.204	60.843	344.870	486.321	115.567	229.303	66,5
2019	10.979	19.205	38.628	24.416	27.126	36.024	15.398	21.544	35.308	39.996	47.803	70.829	193.320	387.256	83.160	110.160	57,0
2020	22.016	37.727	39.887	21.825	25.073	57.067	69.427	44.372	71.296	76.341	64.357	80.721	317.394	610.109	123.760	193.634	61,0
2021	35.358	44.749	76.357	48.375	43.138	62.348	36.311	44.756					391.392	391.392	158.022	233.370	59,6

Ticari Araç Pazarının Analizi(x1000)(OCAK - AĞUSTOS)
CV Market Analysis(x1000)(January - August)

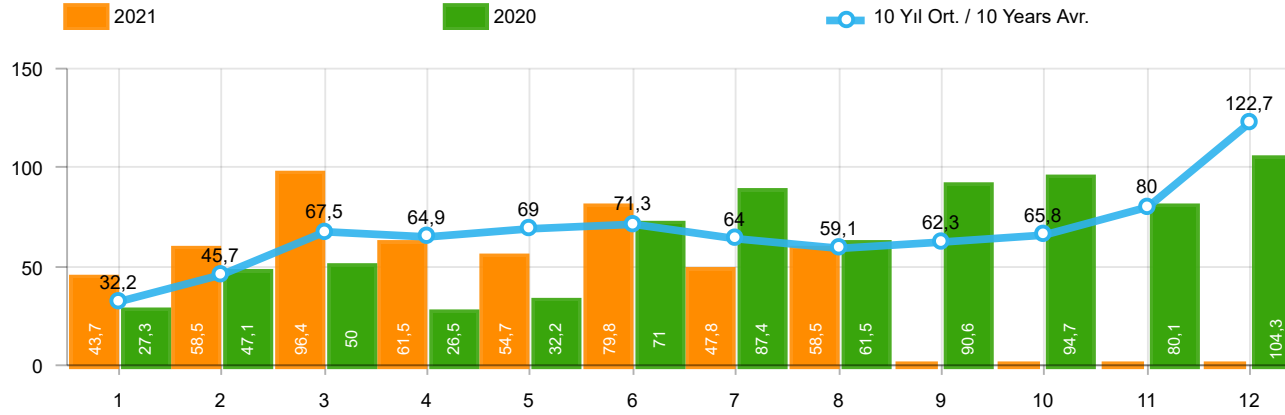
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Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2021	%
1	10.509	9.950	-5,3
2	14.038	16.576	18,1
3	20.075	23.689	18,0
4	18.445	16.176	-12,3
5	19.509	14.329	-26,6
6	19.198	20.956	9,2
7	17.352	13.421	-22,7
8	17.248	15.755	-8,7
TOPLAM / TOTAL	136.374	130.852	-4,1

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	17.891	23.582	30.022	28.947	29.560	29.278	22.140	22.770	24.349	25.719	22.199	45.511	204.190	321.968	118.738	85.452	41,8
2012	10.475	14.949	21.972	20.914	24.735	24.259	20.913	19.746	24.141	19.493	22.906	40.516	157.963	265.019	94.240	63.723	40,3
2013	11.728	14.319	21.158	20.266	23.452	19.753	19.440	16.051	18.463	13.705	19.353	34.849	146.167	232.537	82.484	63.683	43,6
2014	10.383	10.492	13.500	14.344	16.068	17.017	16.168	18.172	21.502	18.928	24.673	44.789	116.144	226.036	65.444	50.700	43,7
2015	12.758	18.404	28.089	25.971	22.926	23.305	23.140	23.491	20.093	19.132	26.034	50.124	178.084	293.467	104.244	73.840	41,5
2016	11.011	14.252	21.957	22.130	23.258	23.555	14.166	19.677	18.073	21.920	29.679	37.662	150.006	257.340	82.968	67.038	44,7
2017	10.951	13.927	20.562	20.233	22.267	19.656	22.343	19.928	20.623	23.951	27.816	41.813	149.867	264.070	79.916	69.951	46,7
2018	9.914	12.867	19.802	18.778	17.769	11.563	12.170	8.161	6.320	5.512	13.202	19.171	111.024	155.229	58.818	52.206	47,0
2019	3.868	6.364	12.023	7.528	6.821	7.875	3.044	5.288	7.760	10.292	11.772	22.056	52.811	104.691	28.409	24.402	46,2
2020	6.107	11.221	11.667	5.340	8.235	15.722	19.992	19.198	22.110	20.784	18.467	27.198	97.482	186.041	61.037	36.445	37,4
2021	9.950	16.576	23.689	16.176	14.329	20.956	13.421	15.755					130.852	130.852	71.158	59.694	45,6

Hafif Araç Pazarının Analizi(x1000)(OCAK - AĞUSTOS)
LV Market Analysis(x1000)(January - August)

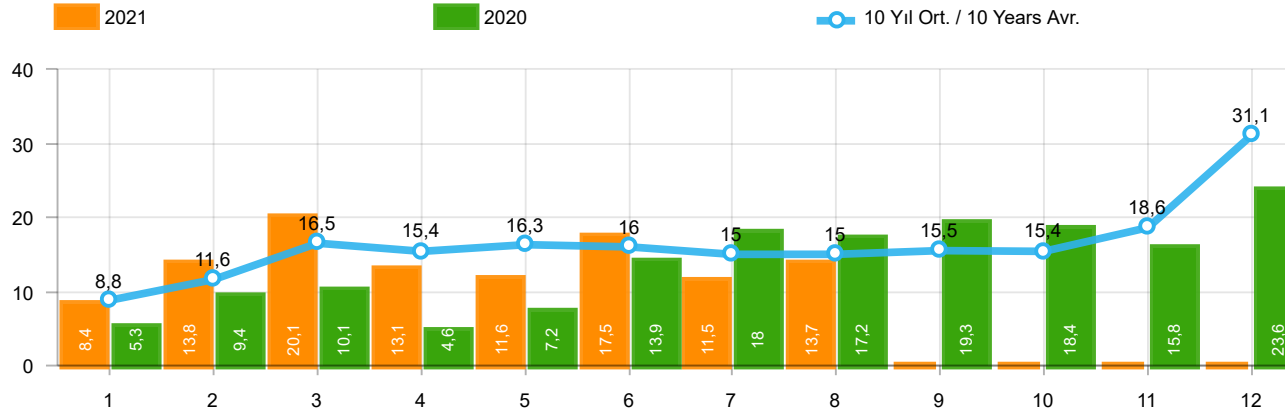


Aylar / Months	10 Yıl Ort / 10 Years Avr.	2021	%
1	32.200	43.728	35,8
2	45.744	58.504	27,9
3	67.527	96.428	42,8
4	64.856	61.488	-5,2
5	68.997	54.734	-20,7
6	71.295	79.819	12,0
7	63.958	47.849	-25,2
8	59.059	58.454	-1,0
TOPLAM / TOTAL	473.636	501.004	5,8

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	44.892	58.663	78.403	77.695	80.646	81.573	63.044	58.406	60.129	69.421	63.657	127.910	543.322	864.439	212.097	331.225	61,0
2012	29.545	41.324	64.884	62.949	70.863	71.067	62.304	58.148	69.629	59.938	71.710	115.400	461.084	777.761	164.984	296.100	64,2
2013	35.523	48.307	68.774	73.575	81.468	74.096	71.596	65.043	67.963	58.014	79.301	129.718	518.382	853.378	148.289	370.093	71,4
2014	32.670	35.021	47.581	53.305	58.121	60.163	59.907	60.199	66.531	66.573	80.621	146.989	406.967	767.681	123.875	283.092	69,6
2015	34.615	55.331	83.302	91.602	81.542	86.158	83.836	82.577	64.025	64.255	84.601	156.173	598.963	968.017	193.665	405.298	67,7
2016	32.713	52.825	82.948	84.887	93.904	91.540	58.533	71.556	67.593	83.000	122.309	141.912	568.906	983.720	176.515	392.391	69,0
2017	35.323	46.965	73.802	75.988	85.422	83.658	82.297	72.536	71.352	91.752	100.859	136.240	555.991	956.194	196.518	359.473	64,7
2018	35.076	47.009	76.345	71.126	72.755	51.037	52.734	34.346	23.028	21.571	58.204	77.706	440.428	620.937	164.168	276.260	62,7
2019	14.373	24.875	49.221	30.971	33.016	42.688	17.927	26.246	41.992	49.075	58.176	90.500	239.317	479.060	106.925	132.392	55,3
2020	27.273	47.122	50.008	26.457	32.235	70.973	87.401	61.533	90.619	94.733	80.141	104.293	403.002	772.788	176.555	226.447	56,2
2021	43.728	58.504	96.428	61.488	54.734	79.819	47.849	58.454					501.004	501.004	215.949	285.055	56,9

Hafif Ticari Araç Pazarının Analizi(x1000)(OCAK - AĞUSTOS)
LCV Market Analysis(x1000)(January - August)

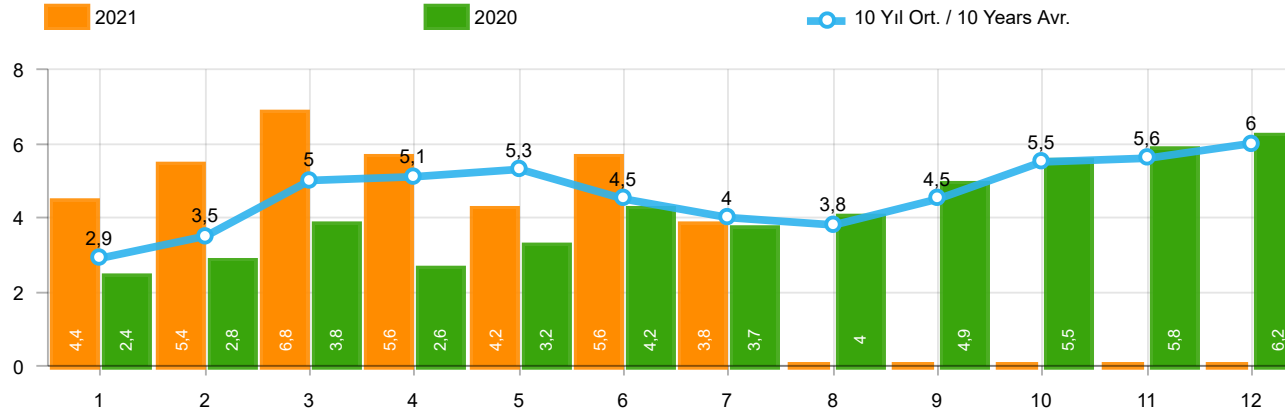
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Aylar / Months	10 Yıl Ort / 10 Years Avr.	2021	%
1	8.770	8.370	-4,6
2	11.637	13.755	18,2
3	16.480	20.071	21,8
4	15.413	13.113	-14,9
5	16.251	11.596	-28,6
6	16.047	17.471	8,9
7	15.020	11.538	-23,2
8	15.023	13.698	-8,8
TOPLAM / TOTAL	114.641	109.612	-4,4

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	15.024	19.659	24.380	23.860	24.344	24.859	19.526	19.531	20.165	21.913	18.706	38.953	171.183	270.920	95.976	75.207	43,9
2012	8.468	12.135	17.614	17.304	20.403	20.218	17.773	16.912	20.269	16.498	19.413	34.474	130.827	221.481	74.511	56.316	43,0
2013	9.688	11.493	16.989	16.576	19.085	15.806	15.884	13.432	15.038	11.029	15.184	28.519	118.953	188.723	61.656	57.297	48,2
2014	8.302	7.854	9.769	10.536	11.742	12.885	13.305	15.068	17.269	15.759	20.926	36.935	89.461	180.350	45.012	44.449	49,7
2015	10.117	14.514	21.626	21.391	18.664	18.392	19.618	20.824	16.937	16.301	22.204	41.833	145.146	242.421	79.640	65.506	45,1
2016	9.355	12.237	18.973	19.269	20.072	20.429	12.967	17.579	16.253	19.254	26.526	33.868	130.881	226.782	68.792	62.089	47,4
2017	9.634	12.307	18.186	17.990	19.623	17.494	19.913	17.646	17.929	21.264	24.903	36.546	132.793	233.435	67.358	65.435	49,3
2018	8.465	11.108	16.547	16.018	15.528	9.812	10.710	7.370	5.433	4.762	12.000	16.863	95.558	134.616	48.601	46.957	49,1
2019	3.394	5.670	10.593	6.555	5.890	6.664	2.529	4.702	6.684	9.079	10.373	19.671	45.997	91.804	23.765	22.232	48,3
2020	5.257	9.395	10.121	4.632	7.162	13.906	17.974	17.161	19.323	18.392	15.784	23.572	85.608	162.679	52.795	32.813	38,3
2021	8.370	13.755	20.071	13.113	11.596	17.471	11.538	13.698					109.612	109.612	57.927	51.685	47,2

Traktör Pazarının Analizi(x1000)(OCAK - TEMMUZ)
Tractor Market Analysis(x1000)(January - July)



Aylar / Months	10 Yıl Ort / 10 Years Avr.	2021	%
1	2.860	4.411	54,2
2	3.521	5.395	53,2
3	4.990	6.845	37,2
4	5.108	5.581	9,3
5	5.277	4.200	-20,4
6	4.457	5.571	25,0
7	4.011	3.846	-4,1
TOPLAM / TOTAL	30.224	35.849	18,6

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-7 Toplam / Total	Toplam / Total
2011	2.975	5.242	5.927	5.358	6.016	6.335	4.534	4.051	4.140	5.828	4.943	4.992	36.387	60.341
2012	2.362	1.983	4.348	6.579	6.273	4.569	3.837	3.158	3.618	4.027	4.807	4.757	29.951	50.318
2013	2.161	2.432	4.005	4.585	5.616	3.136	4.574	3.408	4.935	4.762	5.781	6.891	26.509	52.286
2014	2.169	3.512	4.476	4.905	5.094	5.028	4.233	4.920	5.619	5.743	6.250	7.409	29.417	59.358
2015	3.124	3.984	5.460	6.383	6.078	5.748	4.677	5.044	4.765	7.049	6.898	7.564	35.454	66.774
2016	3.739	4.731	7.067	6.546	6.575	5.543	3.833	5.134	4.945	7.372	7.090	7.603	38.034	70.178
2017	3.974	4.964	6.773	6.780	7.057	5.356	5.003	4.396	6.064	7.734	7.457	7.351	39.907	72.909
2018	4.362	4.179	5.925	5.216	4.584	3.146	3.654	2.587	3.541	3.698	3.578	3.886	31.066	48.356
2019	1.311	1.401	2.143	2.126	2.229	1.538	2.039	1.579	2.284	2.828	3.037	3.782	12.787	26.297
2020	2.425	2.778	3.771	2.606	3.244	4.173	3.727	3.974	4.928	5.466	5.831	6.221	22.724	49.144
2021	4.411	5.395	6.845	5.581	4.200	5.571	3.846	-					35.849	35.849

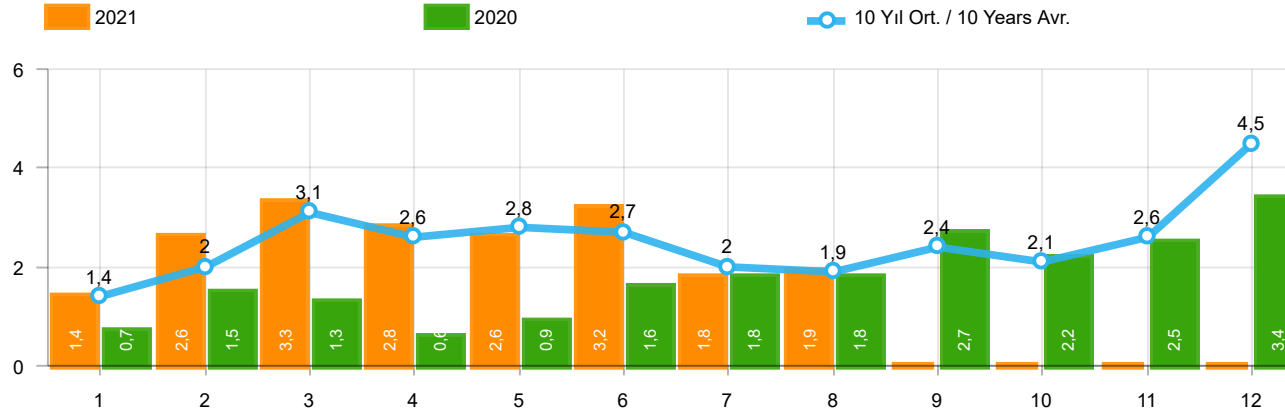
Kaynak: TÜİK trafik kayıtları.

Rakamlar, son iki model yılına ait traktör tescillerinden oluşmaktadır.

Source: Turkish Statistical Institute – Traffic registrations

Data represents the last two model year's farm tractors registration figures

Kamyon Pazarının Analizi(x1000)(OCAK - AĞUSTOS)
Truck Market Analysis(x1000)(January - August)

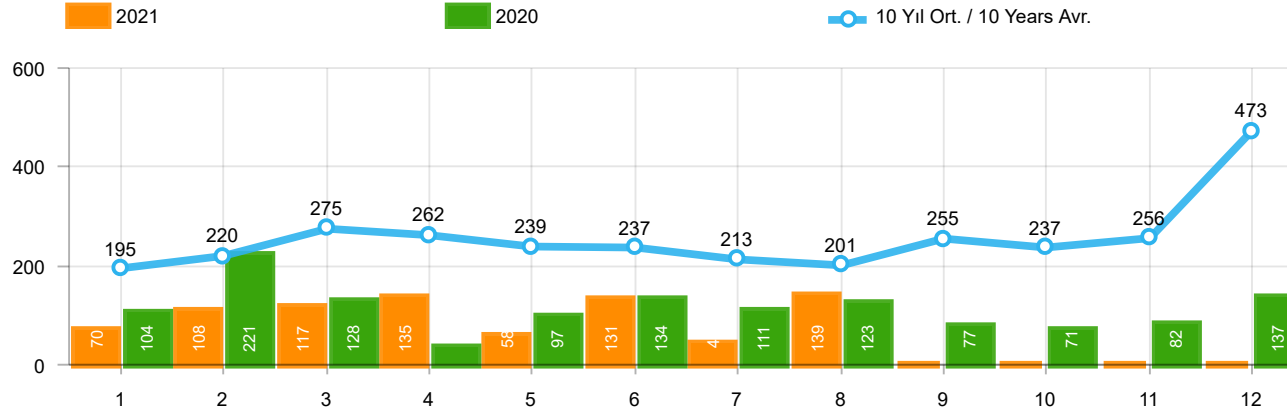


Aylar / Months	10 Yıl Ort / 10 Years Avr.	2021	%
1	1.393	1.366	-2,0
2	2.007	2.633	31,2
3	3.082	3.319	7,7
4	2.560	2.788	8,9
5	2.753	2.617	-4,9
6	2.689	3.238	20,4
7	1.973	1.799	-8,8
8	1.884	1.860	-1,3
TOPLAM / TOTAL	18.339	19.620	7,0

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	2.651	3.544	5.142	4.503	4.563	3.852	2.261	2.745	3.784	3.400	3.149	5.712	29.261	45.306	19.098	10.163	34,7
2012	1.703	2.454	3.866	3.209	3.678	3.540	2.750	2.403	3.296	2.497	3.154	5.300	23.603	37.850	16.228	7.375	31,2
2013	1.484	2.113	3.343	2.925	3.504	3.186	2.777	2.103	2.875	2.086	3.631	5.444	21.435	35.471	15.068	6.367	29,7
2014	1.522	2.065	3.094	3.224	3.727	3.726	2.578	2.783	3.708	2.858	3.384	6.869	22.719	39.538	16.613	6.106	26,9
2015	2.215	3.346	5.699	3.729	3.600	4.253	2.922	2.211	2.687	2.266	3.146	7.307	27.975	43.381	19.710	8.265	29,5
2016	1.167	1.648	2.515	2.319	2.711	2.623	984	1.796	1.438	2.238	2.485	3.127	15.763	25.051	10.845	4.918	31,2
2017	931	1.290	1.982	1.888	2.184	1.891	1.974	1.860	2.284	2.188	2.487	4.438	14.000	25.397	9.496	4.504	32,2
2018	1.237	1.552	2.630	2.328	1.909	1.272	1.235	603	653	488	905	1.695	12.766	16.507	7.528	5.238	41,0
2019	342	579	1.255	842	728	981	435	497	854	1.047	1.100	2.087	5.659	10.747	3.489	2.170	38,3
2020	682	1.475	1.290	628	921	1.570	1.809	1.835	2.660	2.239	2.537	3.358	10.210	21.004	6.578	3.632	35,6
2021	1.366	2.633	3.319	2.788	2.617	3.238	1.799	1.860					19.620	19.620	11.611	8.009	40,8

Midibüs Pazarının Analizi(OCAK - AĞUSTOS)
Midibus Market Analysis(January - August)

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 8 / 2021
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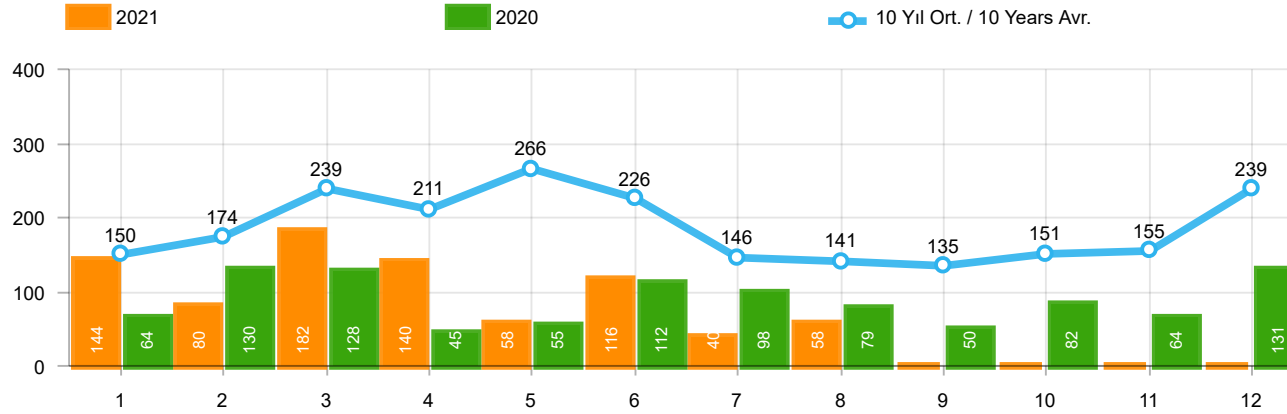


Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2021	%
1	195	70	-64,1
2	220	108	-50,9
3	275	117	-57,4
4	262	135	-48,5
5	239	58	-75,7
6	237	131	-44,6
7	213	44	-79,3
8	201	139	-31,0
TOPLAM / TOTAL	1.842	802	-56,5

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total
2011	124	167	267	260	241	233	205	280	270	230	168	525	1.777	2.970
2012	179	257	277	229	257	239	216	249	325	269	189	398	1.903	3.084
2013	191	268	289	276	283	241	367	235	305	392	415	697	2.150	3.959
2014	360	394	384	333	294	258	216	229	395	220	266	653	2.468	4.002
2015	280	322	451	561	372	405	389	253	316	394	325	621	3.033	4.689
2016	309	158	251	302	261	196	139	220	241	230	354	431	1.836	3.092
2017	212	211	227	231	272	156	250	235	318	268	317	594	1.794	3.291
2018	134	142	410	296	207	315	180	146	160	155	184	425	1.830	2.754
2019	57	61	63	96	106	189	55	44	138	138	257	244	671	1.448
2020	104	221	128	35	97	134	111	123	77	71	82	137	953	1.320
2021	70	108	117	135	58	131	44	139					802	802

Otobüs Pazarının Analizi(OCAK - AĞUSTOS)
Otobus Market Analysis(January - August)

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 8 / 2021
Automotive Industry Monthly Report 8 / 2021

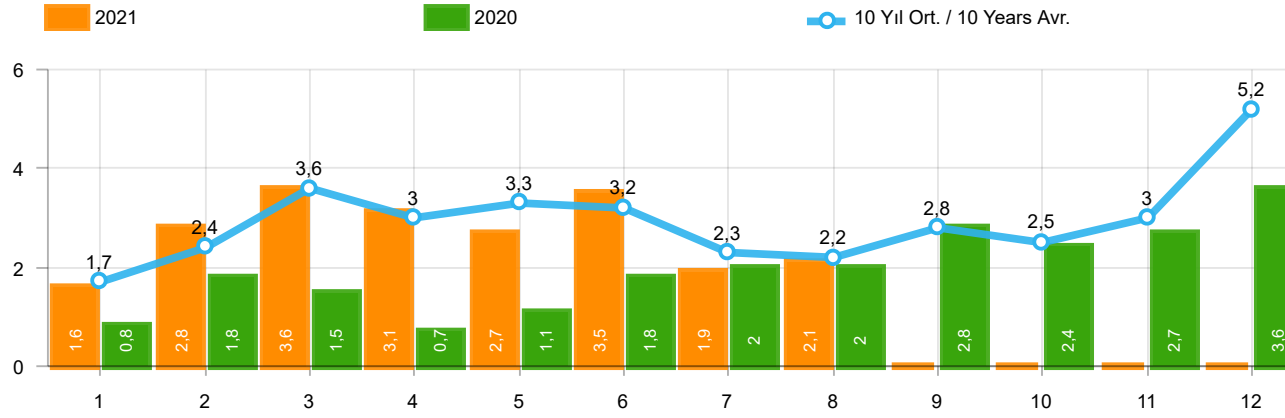


Aylar / Months	10 Yıl Ort / 10 Years Avr.	2021	%
1	150	144	-3,9
2	174	80	-54,0
3	239	182	-23,9
4	211	140	-33,5
5	266	58	-78,2
6	226	116	-48,6
7	146	40	-72,7
8	141	58	-58,8
TOPLAM / TOTAL	1.553	818	-47,3

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	92	212	233	324	412	334	148	214	130	176	176	321	1.969	2.772	1.887	82	4,2
2012	125	103	215	172	397	262	174	182	251	229	150	344	1.630	2.604	1.598	32	2,0
2013	365	445	537	489	580	520	412	281	245	198	123	189	3.629	4.384	3.610	19	0,5
2014	199	179	253	251	305	148	69	92	130	91	97	332	1.496	2.146	1.351	145	9,7
2015	146	222	313	290	290	255	211	203	153	171	359	363	1.930	2.976	1.861	69	3,6
2016	180	209	218	240	214	307	76	82	141	198	314	236	1.526	2.415	1.495	31	2,0
2017	174	119	167	124	188	115	206	187	92	231	109	235	1.280	1.947	1.268	12	0,9
2018	78	65	215	136	125	164	45	42	74	107	113	188	870	1.352	859	11	1,3
2019	75	54	112	35	97	41	25	45	84	28	42	54	484	692	484	-	-
2020	64	130	128	45	55	112	98	79	50	82	64	131	711	1.038	711	-	-
2021	144	80	182	140	58	116	40	58					818	818	818	-	-

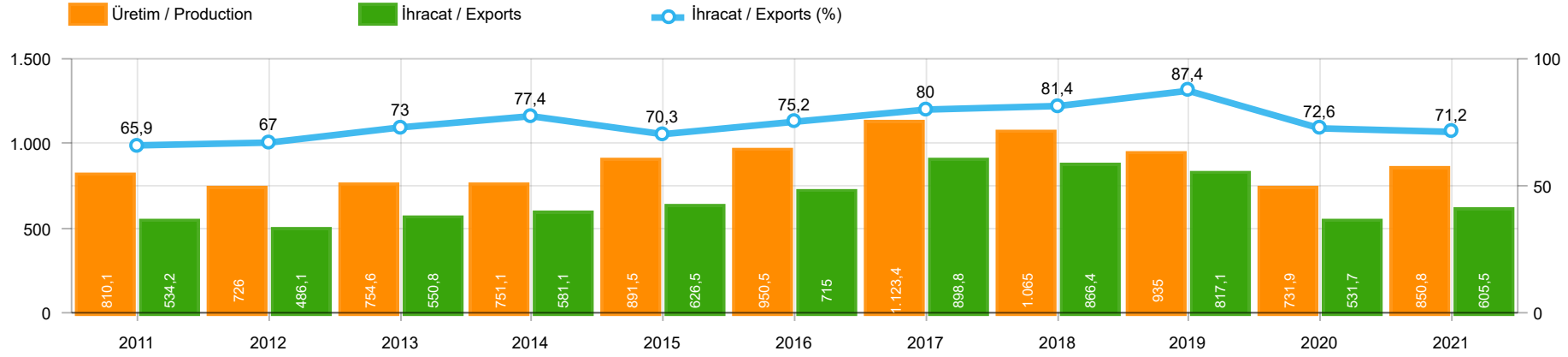
Ağır Ticari Araç Pazarının Analizi(x1000)(OCAK - AĞUSTOS)
HCV Market Analysis(x1000)(January - August)

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 8 / 2021
Automotive Industry Monthly Report 8 / 2021



Aylar / Months	10 Yıl Ort / 10 Years Avr.	2021	%
1	1.738	1.580	-9,1
2	2.401	2.821	17,5
3	3.595	3.618	0,6
4	3.032	3.063	1,0
5	3.258	2.733	-16,1
6	3.152	3.485	10,6
7	2.332	1.883	-19,2
8	2.226	2.057	-7,6
TOPLAM / TOTAL	21.733	21.240	-2,3

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-8 Toplam / Total	Toplam / Total	1-8 Yerli / Local	1-8 İthal / Import	İthal Oran / Import %
2011	2.867	3.923	5.642	5.087	5.216	4.419	2.614	3.239	4.184	3.806	3.493	6.558	33.007	51.048	22.762	10.245	31,0
2012	2.007	2.814	4.358	3.610	4.332	4.041	3.140	2.834	3.872	2.995	3.493	6.042	27.136	43.538	19.729	7.407	27,3
2013	2.040	2.826	4.169	3.690	4.367	3.947	3.556	2.619	3.425	2.676	4.169	6.330	27.214	43.814	20.828	6.386	23,5
2014	2.081	2.638	3.731	3.808	4.326	4.132	2.863	3.104	4.233	3.169	3.747	7.854	26.683	45.686	20.432	6.251	23,4
2015	2.641	3.890	6.463	4.580	4.262	4.913	3.522	2.667	3.156	2.831	3.830	8.291	32.938	51.046	24.604	8.334	25,3
2016	1.656	2.015	2.984	2.861	3.186	3.126	1.199	2.098	1.820	2.666	3.153	3.794	19.125	30.558	14.176	4.949	25,9
2017	1.317	1.620	2.376	2.243	2.644	2.162	2.430	2.282	2.694	2.687	2.913	5.267	17.074	30.635	12.558	4.516	26,4
2018	1.449	1.759	3.255	2.760	2.241	1.751	1.460	791	887	750	1.202	2.308	15.466	20.613	10.217	5.249	33,9
2019	474	694	1.430	973	931	1.211	515	586	1.076	1.213	1.399	2.385	6.814	12.887	4.644	2.170	31,8
2020	850	1.826	1.546	708	1.073	1.816	2.018	2.037	2.787	2.392	2.683	3.626	11.874	23.362	8.242	3.632	30,6
2021	1.580	2.821	3.618	3.063	2.733	3.485	1.883	2.057					21.240	21.240	13.231	8.009	37,7



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
İhracat/Export	534.179	486.057	550.759	581.060	626.461	715.006	898.816	866.389	817.136	531.669	605.474
Üretim/Production	810.077	725.951	754.562	751.112	891.548	950.485	1.123.442	1.064.951	934.953	731.904	850.811
İhracat/Exports (%)	65,9	67	73	77,4	70,3	75,2	80	81,4	87,4	72,6	71,2

Taşıt Araçları İhracatı (2019 - 2021)
Motor Vehicle Exports (2019 - 2021)

SEKTÖR / SECTOR	2019	2020	1/8-2020	1/8-2021	2021/2020 %
OTOMOBİL / Pass.Car	828.744	596.616	360.118	365.704	1,6
OTOMOBİL TOPLAM / Pass. Car Total	828.744	596.616	360.118	365.704	1,6
KAMYON / Truck	14.824	10.333	6.107	9.500	55,6
KAMYONET / Pick Up	349.490	263.767	132.709	191.963	44,6
OTOBÜS / Bus	9.001	6.886	4.241	2.874	-32,2
MİNİBÜS / Minibus	49.283	38.296	19.701	24.908	26,4
MİDİBÜS / Midibus	1.244	640	417	476	14,1
TİCARİ ARAÇLAR TOPLAM / Commercial Vehicle Total	423.842	319.922	163.175	229.721	40,8
TAŞIT ARAÇLARI TOPLAM / Motor Vehicles Total	1.252.586	916.538	523.293	595.425	13,8
TRAKTÖR / F.Tractor	15.844	13.495	8.376	10.049	20,0
TRAKTÖR TOPLAM / F.Tractor Total	15.844	13.495	8.376	10.049	20,0
GENEL TOPLAM / GRAND TOTAL	1.268.430	930.033	531.669	605.474	13,9

Üretici Bazında İhracat (adet)
Exports by Manufacturer (unit)

Üreticiler / Manufacturers	2019	2020	1-8 / 2020	1-8 / 2021
A.I.O.S.	1.433	510	345	472
FORD OTOSAN	333.734	254.003	128.618	182.329
HATTAT TRAKTÖR	637	942	474	505
HONDA TÜRKİYE	7.528	6.421	5.646	1.290
HYUNDAI ASSAN	169.803	128.003	87.463	98.137
KARSAN	2.713	755	326	721
M. BENZ TÜRK	16.324	11.184	6.766	7.810
MAN TÜRKİYE	2.892	2.628	1.774	1.199
OTOKAR	1.156	862	466	462
OYAK RENAULT	295.275	211.954	126.773	114.513
TEMSA	602	243	111	324
TOFAŞ	194.107	117.886	64.131	71.465
TOYOTA	227.019	182.089	100.874	116.703
TÜRK TRAKTÖR	15.207	12.553	7.902	9.544
GENEL TOPLAM / Grand Total	1.268.430	930.033	531.669	605.474

Otomotiv Ana ve Yan Sanayii İhracatı (ABD \$)
CBU and CKD Exports - \$

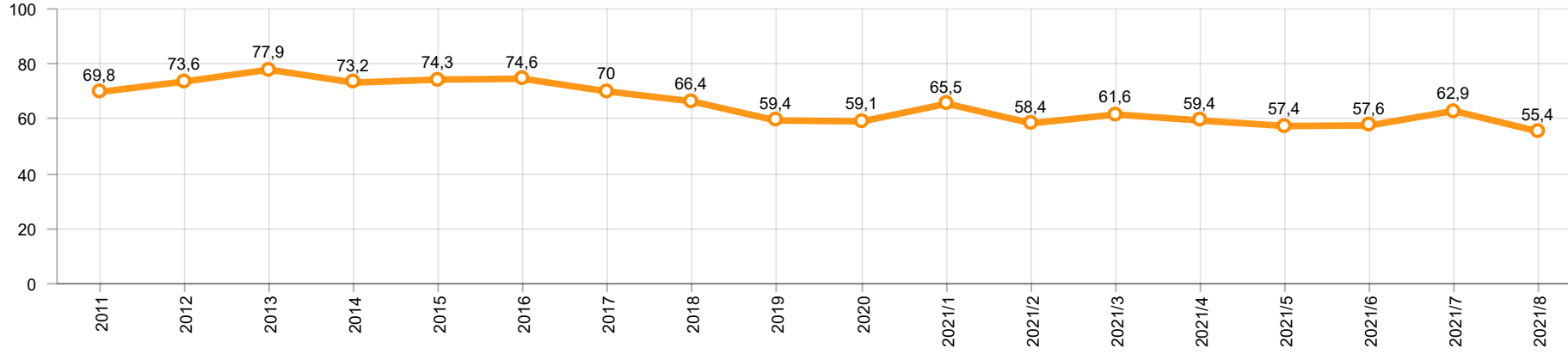
Sektör / Sector	2019	2020	OCAK - AĞUSTOS / January - August 2020	OCAK - AĞUSTOS / January - August 2021	2021 / 2020 %
Toplam Yan Sanayi / Total Component Industry	10.616.350.211,16	9.454.364.326,61	5.560.664.992,06	7.804.788.798,38	40,4
İç ve Dış Lastik / Tyres	1.479.050.683,54	1.248.005.046,63	777.353.231,44	1.049.990.038,52	35,1
Emniyet Camı / Safety Glasses	150.643.773,04	140.363.576,74	84.705.345,35	127.736.939,89	50,8
Motor / Engine	518.051.730,93	461.449.027,72	281.461.815	213.106.498,4	-24,3
Akümülatör / Batteries	397.317.829,27	353.038.607,91	204.355.018,1	305.092.253,15	49,3
Diğer Aksam ve Parça / Spare Parts&Components	8.071.286.194,38	7.251.508.067,61	4.212.789.582,17	6.108.863.068,42	45,0
Toplam Ana Sanayi / Total Vehicle Industry	20.613.753.125,48	16.491.127.868,9	9.206.325.782,79	11.357.362.636,18	23,4
Otobüs / Bus	1.759.421.232,04	1.300.660.458,98	769.872.436,13	596.405.039,59	-22,5
Midibüs-Minibüs / Midibus-Minibus	222.922.951,87	188.434.401,85	129.564.539,85	111.781.107,66	-13,7
Otomobil / P.Cars	11.864.815.315,9	9.312.088.333,82	5.407.645.448,73	6.001.639.307,24	11,0
Kamyon-Kamyonet / Truck-Pick Up&Van	4.945.359.113,74	4.254.957.839,91	2.048.033.059,83	3.398.598.846,82	65,9
Römork ve Yarı Römork / Trailer-Semi Trailer	503.203.636,07	417.420.859,24	252.577.389,47	367.092.627,44	45,3
Çekici / Tractor	839.891.842,8	602.899.223,51	355.772.587,85	564.518.801,67	58,7
Tarım Traktörü / Farm Tractor	478.139.033,06	414.666.751,59	242.860.320,93	317.326.905,76	30,7
Toplam / Total	31.230.103.336,64	25.945.492.195,51	14.766.990.774,85	19.162.151.434,56	29,8

Kaynak: Uludağ İhracatçı Birlikleri . ÜİB tarafından OSD için özel olarak analiz edilen Otomotiv İhracatı kapsamında; ÜİB Türkiye Geneli Otomotiv Endüstrisi sınıflandırmasına kıyasla “Römork ve Yarı Römork” , “Tarım Traktörü” verileri dahil edilmekte; “Kullanılmış Araçlar” ,”İki Tekerlekli Taşıtlar” , “Demiryolu Taşıtları” hariç tutulmaktadır.

Source: Uludağ Exporters Association – Special Analyze for OSD.Compared to Turkish General Automotive Industry classification, this special analyze includes; farms tractors, trailers and semi-trailers, does not include; used vehicles, two-wheeled vehicles and railway vehicles

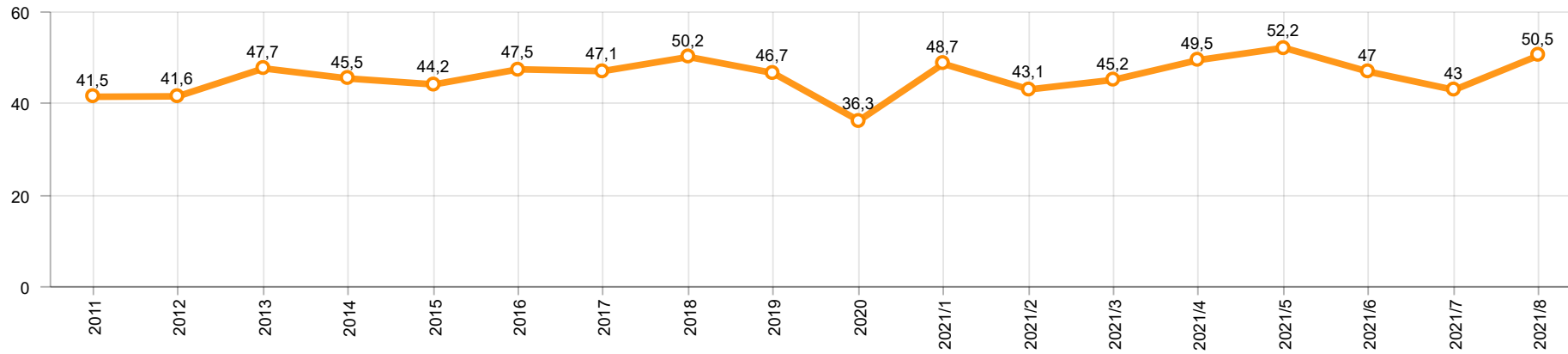
Otomobil Pazarında İthalatın Payı (%)

Import Share in P.Car Market (%)



Hafif Ticari Araçlar Pazarında İthalatın Payı (%)

Import Share in LCV Market (%)



Araç Tipleri / Vehicle Types	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
OTOMOBİL - Pass.Car	48.049	50.384	57.024	56.599	44.565	40.506	26.231	42.346					365.704
KAMYON - H. Truck	986	1.332	2.069	1.441	796	973	683	1.106					9.386
K.KAMYON - L. Truck	12	12	6	6	6	24	-	48					114
KAMYONET - Pick Up	25.164	31.489	31.340	18.079	5.971	25.976	20.322	33.622					191.963
OTOBÜS - Bus	121	258	303	344	398	512	483	455					2.874
MINİBÜS - Minibus	3.159	4.405	4.836	1.605	58	2.405	3.501	4.939					24.908
MİDİBÜS - Midibus	77	28	57	39	53	61	56	105					476
TİCARİ ARAÇLAR TOPLAMI - CV Total	29.519	37.524	38.611	21.514	7.282	29.951	25.045	40.275					229.721
TAŞIT ARAÇLARI TOPLAMI - MV Total	77.568	87.908	95.635	78.113	51.847	70.457	51.276	82.621					595.425
TRAKTÖR - F.Tractor	1.235	1.080	1.311	1.356	1.231	1.687	1.282	867					10.049
GENEL TOPLAM - Grand Total	78.803	88.988	96.946	79.469	53.078	72.144	52.558	83.488					605.474

Otomobil / P.Car

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
FORD OTOSAN	378	669	166	222	36	19	169	53	-	-	-	-	1.712
HONDA TÜRKİYE	149	118	243	120	179	211	240	30	-	-	-	-	1.290
HYUNDAI ASSAN	9.920	10.963	15.565	12.209	10.400	14.080	11.400	13.600	-	-	-	-	98.137
OYAK RENAULT	14.070	15.130	17.913	20.650	15.838	10.149	9	20.754	-	-	-	-	114.513
TOFAŞ	4.038	6.889	4.852	6.345	5.126	4.278	566	1.255	-	-	-	-	33.349
TOYOTA	19.494	16.615	18.285	17.053	12.986	11.769	13.847	6.654	-	-	-	-	116.703
TOPLAM - Total	48.049	50.384	57.024	56.599	44.565	40.506	26.231	42.346	-	-	-	-	365.704

Kamyonet / Pick-up

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	-	-	-	-	-	-	-	-	-	-	-	-	-
FORD OTOSAN	19.856	24.107	26.608	13.013	1.598	21.400	18.276	28.260	-	-	-	-	153.118
KARSAN	22	16	4	-	74	68	140	305	-	-	-	-	629
OTOKAR	-	37	14	24	1	10	14	-	-	-	-	-	100
TOFAŞ	5.286	7.329	4.714	5.042	4.298	4.498	1.892	5.057	-	-	-	-	38.116
TOPLAM - Total	25.164	31.489	31.340	18.079	5.971	25.976	20.322	33.622	-	-	-	-	191.963

Minibüs / Minibus

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
FORD OTOSAN	3.159	4.404	4.826	1.598	58	2.394	3.501	4.915	-	-	-	-	24.855
KARSAN	-	1	10	7	-	11	-	24	-	-	-	-	53
TOPLAM - Total	3.159	4.405	4.836	1.605	58	2.405	3.501	4.939	-	-	-	-	24.908

Kamyon / Truck

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	12	12	6	6	6	24	-	48	-	-	-	-	114
FORD OTOSAN	214	253	372	376	415	214	199	601	-	-	-	-	2.644
KARSAN	-	-	-	-	-	-	-	-	-	-	-	-	-
M. BENZ TÜRK	772	1.079	1.697	1.065	381	759	484	505	-	-	-	-	6.742
OTOKAR	-	-	-	-	-	-	-	-	-	-	-	-	-
TEMSA	-	-	-	-	-	-	-	-	-	-	-	-	-
TOPLAM - Total	998	1.344	2.075	1.447	802	997	683	1.154	-	-	-	-	9.500

Midibüs / Midibus

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	31	21	47	11	26	22	30	40	-	-	-	-	228
KARSAN	-	-	3	1	5	3	1	26	-	-	-	-	39
OTOKAR	44	6	4	22	4	19	20	28	-	-	-	-	147
TEMSA	2	1	3	5	18	17	5	11	-	-	-	-	62
TOPLAM - Total	77	28	57	39	53	61	56	105	-	-	-	-	476

Otobüs / Bus

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	8	13	1	14	27	20	17	30	-	-	-	-	130
KARSAN	-	-	-	-	-	-	-	-	-	-	-	-	-
M. BENZ TÜRK	11	106	46	72	176	243	256	158	-	-	-	-	1.068
MAN TÜRKİYE	42	102	221	226	146	192	145	125	-	-	-	-	1.199
OTOKAR	47	8	13	6	19	23	18	81	-	-	-	-	215
TEMSA	13	29	22	26	30	34	47	61	-	-	-	-	262
TOPLAM - Total	121	258	303	344	398	512	483	455	-	-	-	-	2.874

Traktör / F.Tractor

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
HATTAT TRAKTÖR	20	50	69	52	72	60	65	117	-	-	-	-	505
TÜRK TRAKTÖR	1.215	1.030	1.242	1.304	1.159	1.627	1.217	750	-	-	-	-	9.544
TOPLAM - Total	1.235	1.080	1.311	1.356	1.231	1.687	1.282	867	-	-	-	-	10.049

Firmalar / Firms	2020 Toplam / Total	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
Alfa Romeo	214	76	20	11	9	8	21	12	12	-	-	-	-	169
Aston Martin	17	3	2	4	3	2	3	2	3	-	-	-	-	22
Audi	18.168	839	747	1.899	1.040	915	1.439	1.047	1.525	-	-	-	-	9.451
Bentley	11	-	1	-	4	1	1	1	-	-	-	-	-	8
BMW	14.270	613	937	1.822	1.349	904	1.319	1.105	1.429	-	-	-	-	9.478
Citroen	22.254	1.188	1.702	2.988	1.720	1.791	1.268	947	1.640	-	-	-	-	13.244
CUPRA	-	-	-	-	55	17	5	12	18	-	-	-	-	107
Dacia	25.910	1.396	1.611	3.540	2.500	1.605	3.191	2.999	2.745	-	-	-	-	19.587
DFSK	-	-	-	-	2	3	12	9	17	-	-	-	-	43
DS	694	20	35	80	15	106	92	23	83	-	-	-	-	454
Ferrari	21	1	-	5	2	4	2	2	1	-	-	-	-	17
Fiat	1.298	57	124	200	118	88	88	55	80	-	-	-	-	810
Ford	23.897	1.397	891	1.852	1.204	953	1.050	544	1.318	-	-	-	-	9.209
Honda	2.337	249	173	381	189	194	303	162	168	-	-	-	-	1.819
Hyundai	19.035	644	723	1.382	1.020	760	1.481	1.216	1.601	-	-	-	-	8.827
Jaguar	265	4	2	20	8	1	8	11	7	-	-	-	-	61
Jeep	4.369	177	266	444	203	229	592	254	272	-	-	-	-	2.437
Kia	13.542	1.306	1.502	1.833	1.917	1.174	2.113	1.600	1.042	-	-	-	-	12.487
Lamborghini	19	1	2	-	1	2	2	-	1	-	-	-	-	9
Land Rover	2.010	79	75	386	235	137	206	128	165	-	-	-	-	1.411
Lexus	143	21	14	12	23	9	38	12	18	-	-	-	-	147
Maserati	47	2	5	8	5	-	11	3	12	-	-	-	-	46
Mazda	156	7	10	17	6	4	9	12	14	-	-	-	-	79
Mercedes-Benz	15.617	977	984	2.243	1.673	1.447	2.133	1.013	1.533	-	-	-	-	12.003
MG	-	-	-	-	19	27	94	21	17	-	-	-	-	178
Mini	1.395	141	57	137	77	66	116	102	144	-	-	-	-	840
Mitsubishi	1.237	63	61	138	227	87	77	44	103	-	-	-	-	800
Nissan	12.717	1.435	1.682	1.869	683	542	1.237	707	1.524	-	-	-	-	9.679
Opel	31.229	1.672	1.708	3.148	2.010	1.857	2.391	1.167	895	-	-	-	-	14.848
Peugeot	36.589	2.677	2.742	3.485	1.758	2.561	2.544	724	691	-	-	-	-	17.182
Porsche	619	41	43	126	53	42	42	41	35	-	-	-	-	423
Renault	9.339	673	985	955	349	412	680	369	669	-	-	-	-	5.092
Seat	11.551	880	1.313	1.882	1.015	1.189	1.486	966	1.183	-	-	-	-	9.914
Skoda	24.175	1.930	2.708	5.204	2.200	2.014	3.521	2.028	1.376	-	-	-	-	20.981
Smart	49	-	4	3	-	-	-	-	-	-	-	-	-	7
Ssangyong	650	68	66	103	49	20	45	22	90	-	-	-	-	463
Subaru	673	31	27	84	63	60	85	42	56	-	-	-	-	448
Suzuki	2.977	77	91	419	205	357	441	430	551	-	-	-	-	2.571
Toyota	2.016	111	113	294	173	149	251	147	254	-	-	-	-	1.492
Volkswagen	52.740	4.082	4.286	9.440	5.759	4.506	6.617	4.202	2.785	-	-	-	-	41.677
Volvo	8.200	215	425	660	800	520	880	650	700	-	-	-	-	4.850
GENEL TOPLAM - Grand Total	360.450	23.153	26.137	47.074	28.741	24.763	35.894	22.831	24.777	-	-	-	-	233.370

Firmalar / Firms	2020 Toplam / Total	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
Citroen	5.226	277	533	602	539	321	427	255	337	-	-	-	-	3.291
Dacia	4.890	768	650	772	363	372	894	1.016	1.675	-	-	-	-	6.510
Fiat	3.861	100	298	360	178	306	395	165	209	-	-	-	-	2.011
Ford	3.034	60	62	143	89	418	253	181	148	-	-	-	-	1.354
Hyundai	990	125	244	185	123	56	181	108	199	-	-	-	-	1.221
Isuzu	229	13	6	56	68	42	63	48	60	-	-	-	-	356
Iveco	1.851	91	209	316	215	149	270	223	277	-	-	-	-	1.750
Kia	1.900	152	203	256	212	147	141	-	80	-	-	-	-	1.191
Mercedes-Benz	5.175	155	414	637	393	489	875	467	687	-	-	-	-	4.117
Mitsubishi	4.629	402	351	418	464	217	379	227	267	-	-	-	-	2.725
Nissan	544	82	61	53	171	109	121	92	114	-	-	-	-	803
Opel	3.067	176	470	528	225	243	314	107	92	-	-	-	-	2.155
Peugeot	7.085	519	669	1.318	690	514	705	459	439	-	-	-	-	5.313
Renault	2.634	269	349	863	424	297	467	154	487	-	-	-	-	3.310
Ssangyong	434	20	30	54	30	28	36	15	23	-	-	-	-	236
Toyota	1.417	238	62	995	942	588	592	368	397	-	-	-	-	4.182
Volkswagen	12.036	626	1.315	1.510	1.366	1.754	2.097	1.071	1.421	-	-	-	-	11.160
GENEL TOPLAM - Grand Total	59.002	4.073	5.926	9.066	6.492	6.050	8.210	4.956	6.912	-	-	-	-	51.685