



OTOMOTİV SANAYİİ DERNEĞİ
AUTOMOTIVE MANUFACTURERS ASSOCIATION

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU ŞUBAT 2019

AUTOMOTIVE INDUSTRY MONTHLY REPORT
February 2019

OSD "OICA" Üyesidir



OSD is a Member of "OICA"

2019 ŞUBAT Ayı Özeti
2019 February Summary

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 2 / 2019
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	2 - 2018	2 - 2019	%	1 - 2 / 2018	1 - 2 / 2019	%	3/2017 - 2/2018	3/2018 - 2/2019	%
Otomobil Üretimi/P.Cars Production	94.117	80.077	-14,9	179.485	151.474	-15,6	1.131.581	998.560	-11,8
Toplam Üretim/Total Production	141.384	119.473	-15,5	265.731	229.327	-13,7	1.694.974	1.513.856	-10,7
Otomobil Pazar/P.Cars Market	35.901	19.205	-46,5	62.512	30.184	-51,7	724.924	453.993	-37,4
Toplam Pazar/Total Market	48.768	25.612	-47,5	85.293	40.459	-52,6	986.897	596.716	-39,5
Otomobil İthalat/P.Cars Import	24.049	11.614	-51,7	40.881	18.390	-55,0	506.073	300.425	-40,6
Toplam İthalat/Total Import	29.990	14.604	-51,3	51.623	23.012	-55,4	623.613	368.657	-40,9
Otomobil İhracat/P.Cars Export	75.779	69.340	-8,5	149.187	128.147	-14,1	912.059	854.107	-6,4
Toplam İhracat/Total Export	121.402	106.084	-12,6	215.715	199.497	-7,5	1.329.076	1.302.651	-2,0
Otomobil İhracat(\$)/P.Cars Export (\$)	1.066.987.051	952.769.773	-10,7	2.018.479.631	1.764.830.420	-12,6	12.033.776.657	12.167.301.855	1,1
Toplam İhracat(\$)/Total Export (\$)*	2.844.379.830	2.578.315.647	-9,4	5.177.423.608	4.959.106.867	-4,2	30.092.872.362	32.012.369.477	6,4

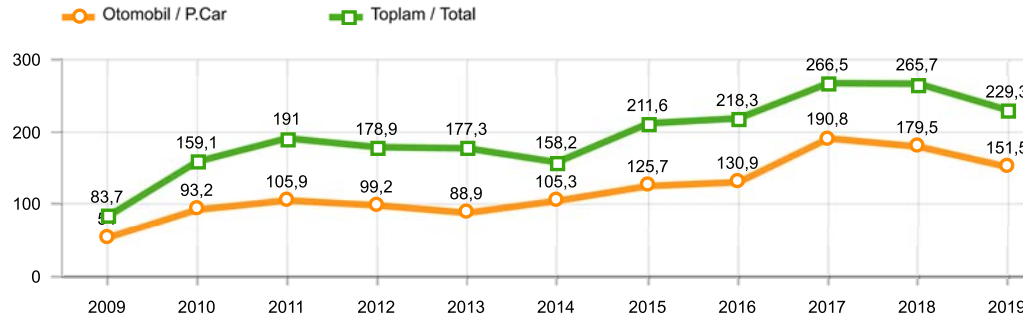
Parametreler/Parameters	2 - 2018	2 - 2019	%	1 - 2 / 2018	1 - 2 / 2019	%	3/2017 - 2/2018	3/2018 - 2/2019	%
ÜFE / PPI	2,7	0,1	-	3,7	0,6	-	15,5	30,0	-
TÜFE / CPI	0,7	0,2	-	1,8	1,2	-	11,2	17,9	-
Sanayi Endeksi / Industry Index	1,5	0,6	-	3,1	1,1	-	17,1	29,0	-
Dolar \$ **	3,8	5,3	39,1	3,8	5,3	39,7	3,6	5,0	38,2
Euro € **	4,7	6,0	29,0	4,6	6,0	30,1	4,2	5,9	38,8
Japon Yeni ¥ **	3,5	4,8	37,2	3,4	4,8	39,7	3,3	4,5	39,1

*Toplam Sanayi / Total Industry Including Components

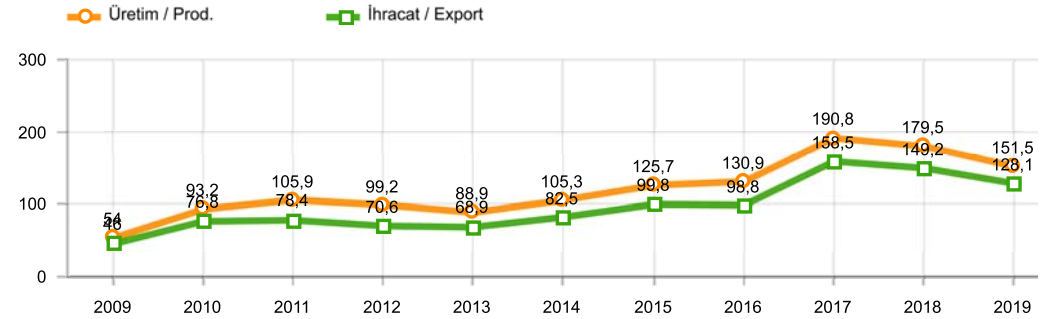
** Ortalama Değerler / Average Values

Araç Tipleri / Types	2 / 2018	2 / 2019	2 % Değişim	1-2 / 2018	1-2 / 2019	1-2 % Değişim
OTOMOBİL / Pass.Car	94.117	80.077	-14,9	179.485	151.474	-15,6
OTOMOBİL Toplam / Pass.Car Total	94.117	80.077	-14,9	179.485	151.474	-15,6
B.KAMYON / H. Truck	2.137	1.660	-22,3	4.008	3.054	-23,8
K.KAMYON / L. Truck	424	30	-92,9	692	30	-95,7
KAMYONET / Pick Up	39.738	31.525	-20,7	71.960	62.643	-12,9
OTOBÜS / Bus	657	677	3,0	1.276	1.426	11,8
MİNİBÜS / Minibus	3.962	5.369	35,5	7.665	10.431	36,1
MİDİBÜS / Midibus	349	135	-61,3	645	269	-58,3
TİCARİ ARAÇLAR Toplam / Commercial Vehicles Total	47.267	39.396	-16,7	86.246	77.853	-9,7
TAŞIT ARAÇLARI Toplam / Motor Vehicles Total	141.384	119.473	-15,5	265.731	229.327	-13,7
TRAKTÖR / F.Tractor	4.508	1.635	-63,7	9.072	2.696	-70,3
TRAKTÖR Toplam / F.Tractor Total	4.508	1.635	-63,7	9.072	2.696	-70,3
GENEL TOPLAM / Grand Total	145.892	121.108	-17,0	274.803	232.023	-15,6

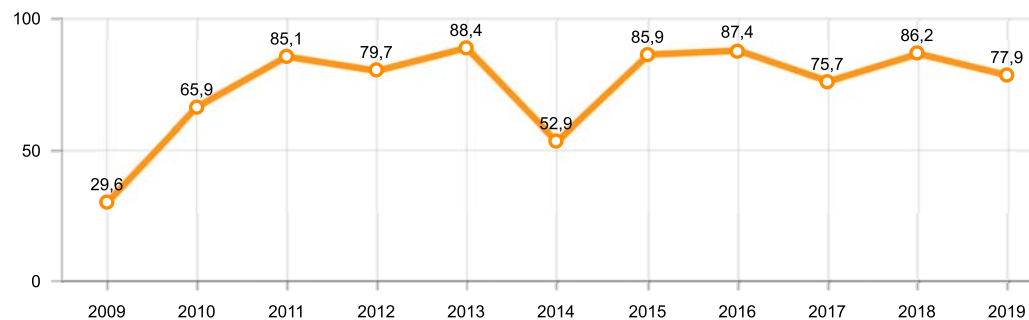
Toplam Üretim ve Otomobil Üretimi (x1000)(OCAK - ŞUBAT)
Total & P.Cars Production (x1000)(January - February)



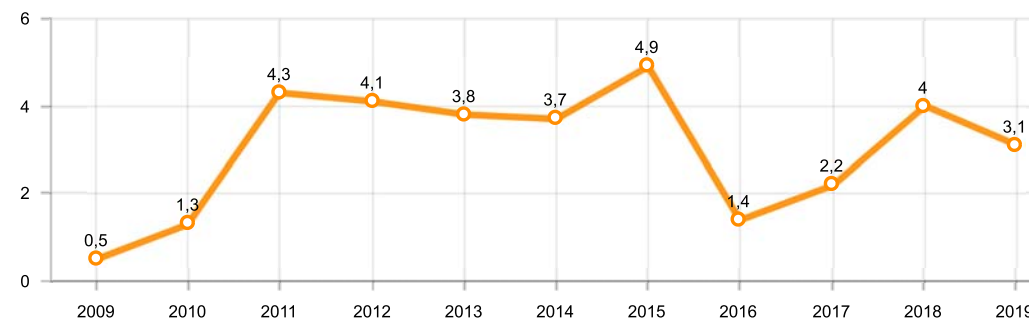
Otomobil Üretimi ve İhracat (x1000)(OCAK - ŞUBAT)
P.Cars Production & Exports (x1000)(January - February)



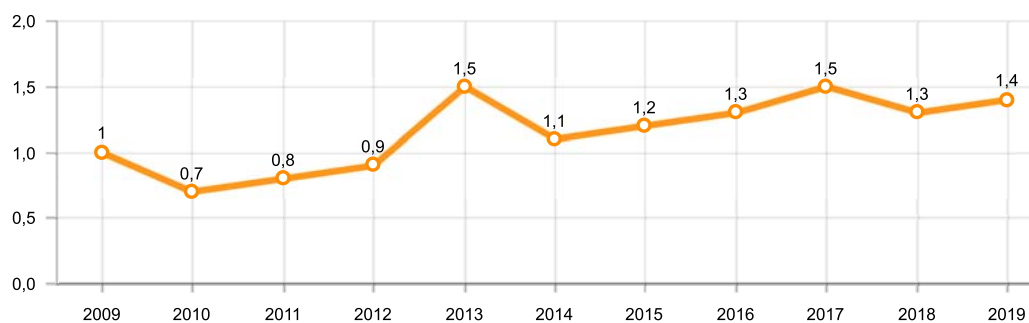
Ticari Araç Üretimi (x1000)(OCAK - ŞUBAT)
Commercial Vehicle Production (x1000)(January - February)



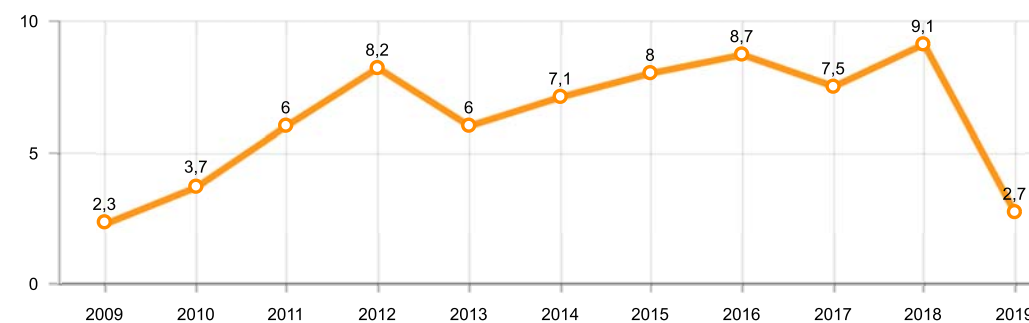
Büyük Kamyon Üretimi (x1000)(OCAK - ŞUBAT)
Heavy Truck Production (x1000)(January - February)



Otobüs Üretimi (x1000)(OCAK - ŞUBAT)
Bus Production (x1000)(January - February)

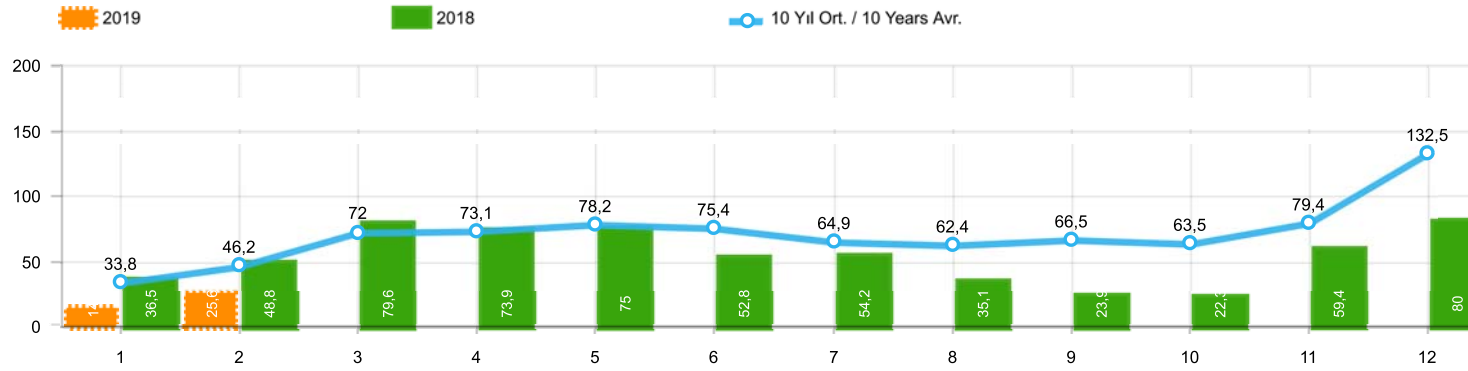


Traktör Üretimi (x1000)(OCAK - ŞUBAT)
F. Tractor Production (x1000)(January - February)



Toplam Pazarın Analizi(x1000)(OCAK - ŞUBAT)
Total Market Analysis(x1000)(January - February)

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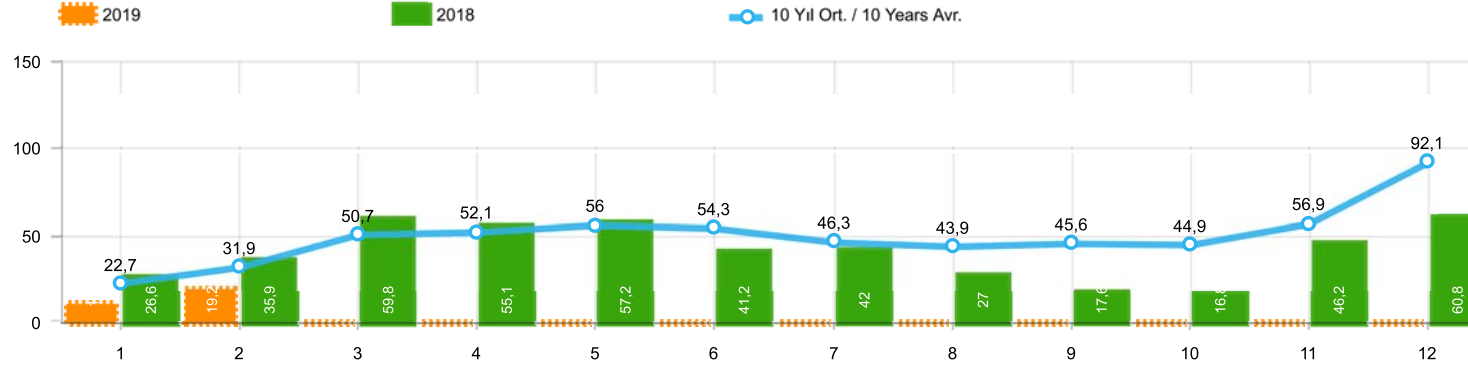


Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2019	%
1	33.809	14.847	-56,1
2	46.213	25.612	-44,6
TOPLAM / TOTAL	80.022	40.459	-49,4

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	20.605	22.873	56.527	54.433	64.947	63.090	30.374	37.038	83.553	22.191	29.309	91.762	43.478	576.702	18.921	24.557	56,5
2010	21.070	32.331	54.019	57.241	61.837	63.511	64.011	64.961	67.040	76.753	77.488	155.234	53.401	795.496	21.478	31.923	59,8
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	110.345	915.487	45.175	65.170	59,1
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	75.690	821.299	30.958	44.732	59,1
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	88.696	897.192	30.647	58.049	65,4
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	72.410	813.367	24.618	47.792	66,0
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	96.477	1.019.063	37.750	58.727	60,9
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	89.209	1.014.278	31.439	57.770	64,8
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	85.225	986.829	32.728	52.497	61,6
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	85.293	641.550	33.670	51.623	60,5
2019	14.847	25.612											40.459	40.459	17.447	23.012	56,9

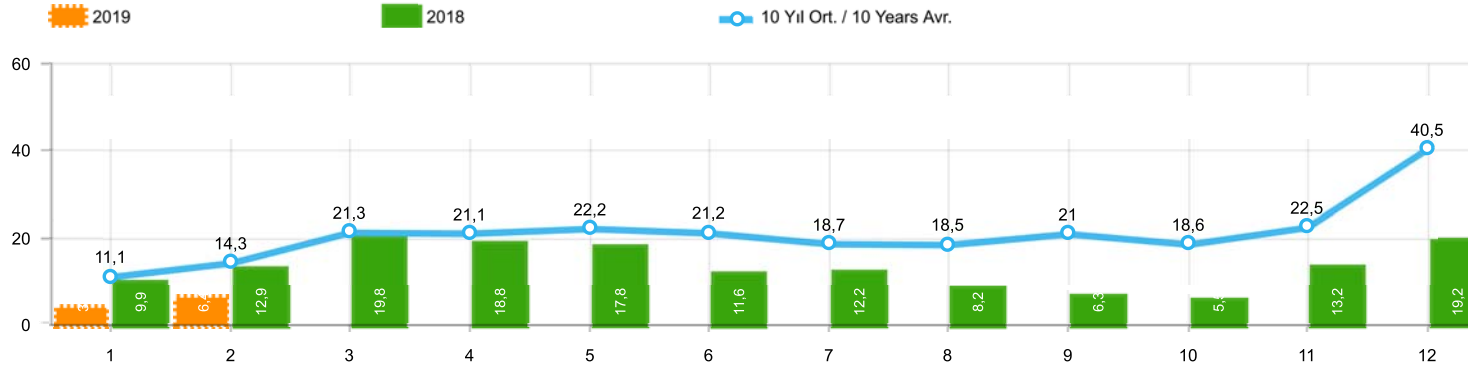
Otomobil Pazarının Analizi(x1000)(OCAK - ŞUBAT)
P.Cars Market Analysis(x1000)(January - February)

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Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2019	%
1	22.707	10.979	-51,6
2	31.928	19.205	-39,8
TOPLAM / TOTAL	54.635	30.184	-44,8

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	13.173	14.492	40.622	36.202	44.188	41.019	16.637	22.537	52.162	13.828	17.781	57.178	27.665	369.819	9.687	17.978	65,0
2010	12.594	20.651	33.958	36.549	40.467	42.086	41.399	42.222	42.477	47.859	50.061	99.461	33.245	509.784	9.828	23.417	70,4
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	68.872	593.519	21.103	47.769	69,4
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	50.266	556.280	16.911	33.355	66,4
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	62.649	664.655	14.658	47.991	76,6
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	51.535	587.331	12.805	38.730	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	65.315	725.596	18.514	46.801	71,7
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	63.946	756.938	17.491	46.455	72,6
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	60.347	722.759	19.571	40.776	67,6
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	62.512	486.321	21.631	40.881	65,4
2019	10.979	19.205											30.184	30.184	11.794	18.390	60,9

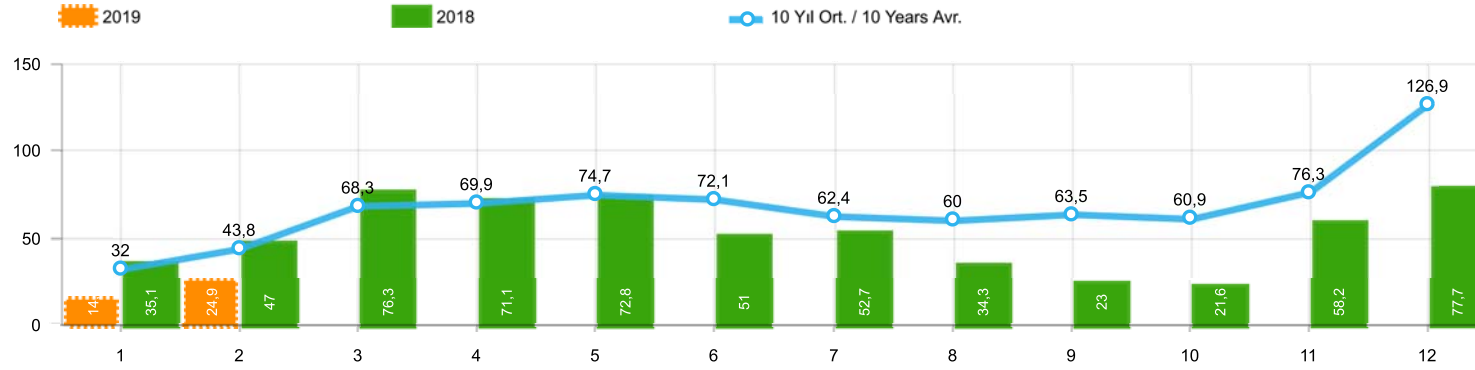


Aylar / Months	10 Yıl Ort / 10 Years Avr.	2019	%
1	11.102	3.868	-65,2
2	14.285	6.407	-55,1
TOPLAM / TOTAL	25.387	10.275	-59,5

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	7.432	8.381	15.905	18.231	20.759	22.071	13.737	14.501	31.391	8.363	11.528	34.584	15.813	206.883	9.234	6.579	41,6
2010	8.476	11.680	20.061	20.692	21.370	21.425	22.612	22.739	24.563	28.894	27.427	55.773	20.156	285.712	11.650	8.506	42,2
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	41.473	321.968	24.072	17.401	42,0
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	25.424	265.019	14.047	11.377	44,7
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	26.047	232.537	15.989	10.058	38,6
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	20.875	226.036	11.813	9.062	43,4
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	31.162	293.467	19.236	11.926	38,3
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	25.263	257.340	13.948	11.315	44,8
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	24.878	264.070	13.157	11.721	47,1
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	22.781	155.229	12.039	10.742	47,2
2019	3.868	6.407											10.275	10.275	5.653	4.622	45,0

Hafif Araç Pazarının Analizi(x1000)(OCAK - ŞUBAT)
LV Market Analysis(x1000)(January - February)

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Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2019	%
1	32.006	14.373	-55,1
2	43.836	24.875	-43,3
TOPLAM / TOTAL	75.842	39.248	-48,3

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	19.606	21.742	55.111	52.640	63.191	61.067	28.845	35.609	81.397	21.033	27.962	88.923	41.348	557.126	17.103	24.245	58,6
2010	20.095	31.172	51.769	54.946	59.377	60.896	61.345	61.764	63.814	73.404	73.962	148.369	51.267	760.913	19.756	31.511	61,5
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	103.555	864.439	40.483	63.072	60,9
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	70.869	777.761	27.386	43.483	61,4
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	83.830	853.378	26.842	56.988	68,0
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	67.691	767.681	20.779	46.912	69,3
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	89.946	968.017	32.531	57.415	63,8
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	85.538	983.720	28.901	56.637	66,2
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	82.288	956.194	30.474	51.814	63,0
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	82.085	620.937	31.493	50.592	61,6
2019	14.373	24.875											39.248	39.248	16.584	22.664	57,7

Hafif Ticari Araç Pazarının Analizi(x1000)(OCAK - ŞUBAT)
LCV Market Analysis(x1000)(January - February)

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Aylar / Months	10 Yıl Ort / 10 Years Avr.	2019	%
1	9.299	3.394	-63,5
2	11.908	5.670	-52,4
TOPLAM / TOTAL	21.207	9.064	-57,3

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	6.433	7.250	14.489	16.438	19.003	20.048	12.208	13.072	29.235	7.205	10.181	31.745	13.683	187.307	7.416	6.267	45,8
2010	7.501	10.521	17.811	18.397	18.910	18.810	19.946	19.542	21.337	25.545	23.901	48.908	18.022	251.129	9.928	8.094	44,9
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	34.683	270.920	19.380	15.303	44,1
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	20.603	221.481	10.475	10.128	49,2
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	21.181	188.723	12.184	8.997	42,5
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	16.156	180.350	7.974	8.182	50,6
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	24.631	242.421	14.017	10.614	43,1
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	21.592	226.782	11.410	10.182	47,2
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	21.941	233.435	10.903	11.038	50,3
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	19.573	134.616	9.862	9.711	49,6
2019	3.394	5.670											9.064	9.064	4.790	4.274	47,2

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



Aylar / Months	10 Yıl Ort / 10 Years Avr.	2019	%
1	2.669	1.311	-50,9
TOPLAM / TOTAL	2.669	1.311	-50,9

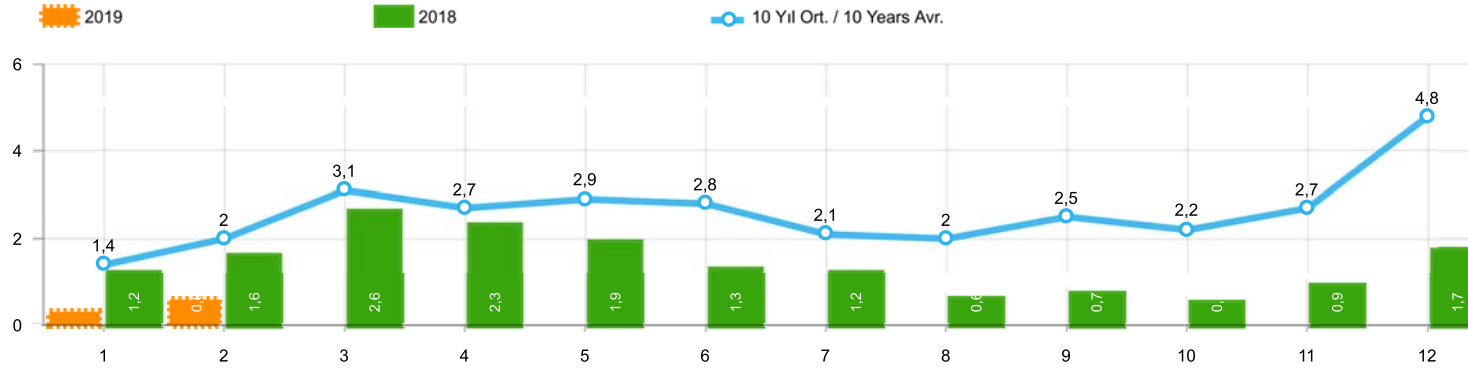
Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-1 Toplam / Total	Toplam / Total
2009	717	572	688	1.070	1.297	1.256	1.054	1.183	1.117	1.356	1.304	2.144	717	13.758
2010	1.111	1.991	2.330	3.039	2.567	2.638	1.965	3.019	2.806	4.424	3.978	6.168	1.111	36.036
2011	2.975	5.242	5.927	5.358	6.016	6.335	4.534	4.051	4.140	5.828	4.943	4.992	2.975	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	2.362	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	2.161	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	2.169	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	3.124	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	3.739	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	3.974	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	4.362	48.356
2019	1.311												1.311	1.311

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

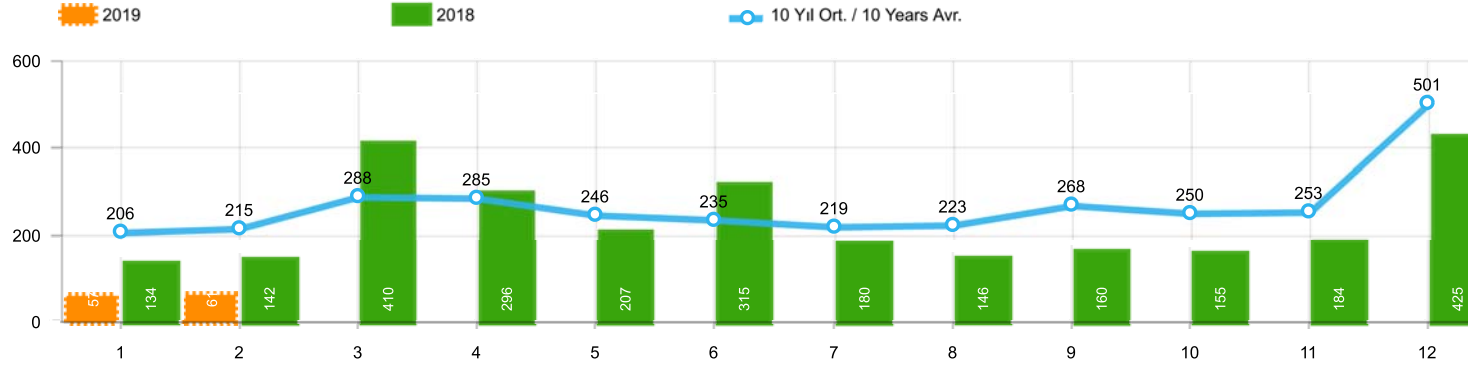


Aylar / Months	10 Yıl Ort / 10 Years Avr.	2019	%
1	1.446	342	-76,3
2	1.974	578	-70,7
TOPLAM / TOTAL	3.420	920	-73,1

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	782	763	1.062	1.381	1.426	1.649	1.261	1.164	1.862	963	1.047	2.368	1.545	15.728	1.240	305	19,7
2010	768	960	1.950	1.949	2.140	2.314	2.403	2.754	2.864	3.001	3.231	6.158	1.728	30.492	1.322	406	23,5
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	6.195	45.306	4.108	2.087	33,7
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	4.157	37.850	2.909	1.248	30,0
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	3.597	35.471	2.538	1.059	29,4
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	3.587	39.538	2.740	847	23,6
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	5.561	43.381	4.260	1.301	23,4
2016	1.167	1.648	2.515	2.319	2.711	2.623	984	1.796	1.438	2.238	2.485	3.127	2.815	25.051	1.682	1.133	40,2
2017	931	1.290	1.982	1.888	2.184	1.891	1.974	1.860	2.284	2.188	2.487	4.438	2.221	25.397	1.548	673	30,3
2018	1.237	1.552	2.630	2.328	1.909	1.272	1.235	603	653	488	905	1.695	2.789	16.507	1.759	1.030	36,9
2019	342	578											920	920	572	348	37,8

Midibüs Pazarının Analizi(OCAK - ŞUBAT)
Midibus Market Analysis(January - February)

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 2 / 2019
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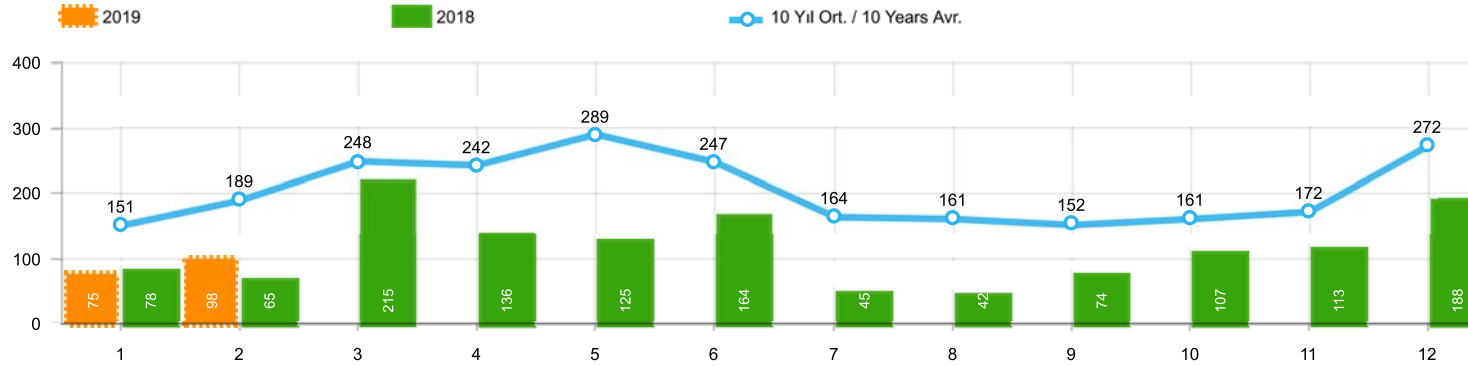


Aylar / Months	10 Yıl Ort / 10 Years Avr.	2019	%
1	206	57	-72,4
2	215	61	-71,6
TOPLAM / TOTAL	421	118	-72,0

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total
2009	133	103	153	210	145	183	138	146	152	134	150	280	236	1.927
2010	140	128	172	153	127	124	93	232	199	204	162	382	268	2.116
2011	124	167	267	260	241	233	205	280	270	230	168	525	291	2.970
2012	179	257	277	229	257	239	216	249	325	269	189	398	436	3.084
2013	191	268	289	276	283	241	367	235	305	392	415	697	459	3.959
2014	360	394	384	333	294	258	216	229	395	220	266	653	754	4.002
2015	280	322	451	561	372	405	389	253	316	394	325	621	602	4.689
2016	309	158	251	302	261	196	139	220	241	230	354	431	467	3.092
2017	212	211	227	231	272	156	250	235	318	268	317	594	423	3.291
2018	134	142	410	296	207	315	180	146	160	155	184	425	276	2.754
2019	57	61											118	118

Otobüs Pazarının Analizi(OCAK - ŞUBAT)
Otobus Market Analysis(January - February)

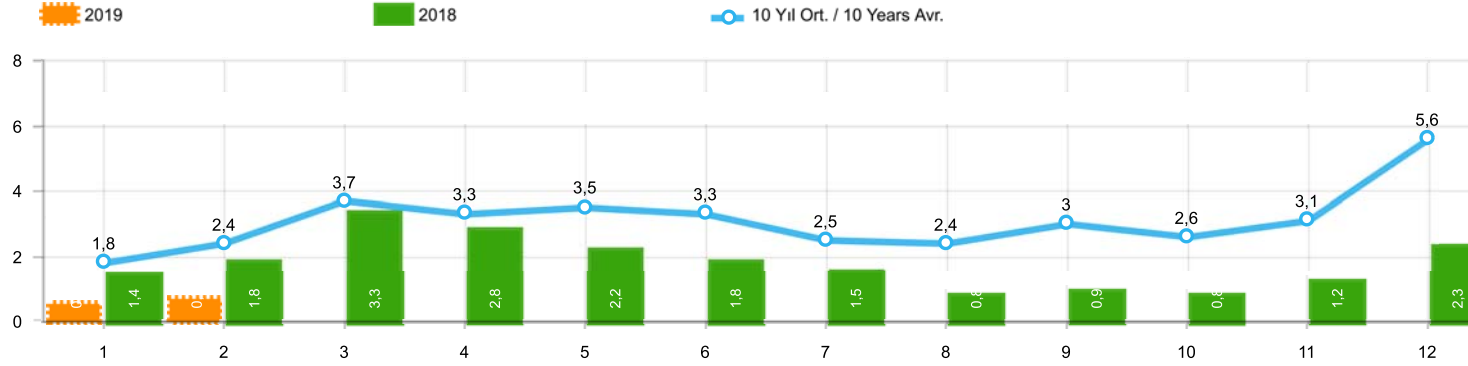
OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 2 / 2019
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Aylar / Months	10 Yıl Ort. / 10 Years Avr.	2019	%
1	151	75	-50,3
2	189	98	-48,1
TOPLAM / TOTAL	340	173	-49,1

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	84	265	201	202	185	191	130	119	142	61	150	191	349	1.921	342	7	2,0
2010	67	71	128	193	193	177	170	211	163	144	133	325	138	1.975	132	6	4,3
2011	92	212	233	324	412	334	148	214	130	176	176	321	304	2.772	293	11	3,6
2012	125	103	215	172	397	262	174	182	251	229	150	344	228	2.604	227	1	0,4
2013	365	445	537	489	580	520	412	281	245	198	123	189	810	4.384	808	2	0,2
2014	199	179	253	251	305	148	69	92	130	91	97	332	378	2.146	345	33	8,7
2015	146	222	313	290	290	255	211	203	153	171	359	363	368	2.976	357	11	3,0
2016	180	209	218	240	214	307	76	82	141	198	314	236	389	2.415	389	-	-
2017	174	119	167	124	188	115	206	187	92	231	109	235	293	1.947	283	10	3,4
2018	78	65	215	136	125	164	45	42	74	107	113	188	143	1.352	142	1	0,7
2019	75	98											173	173	173	-	-

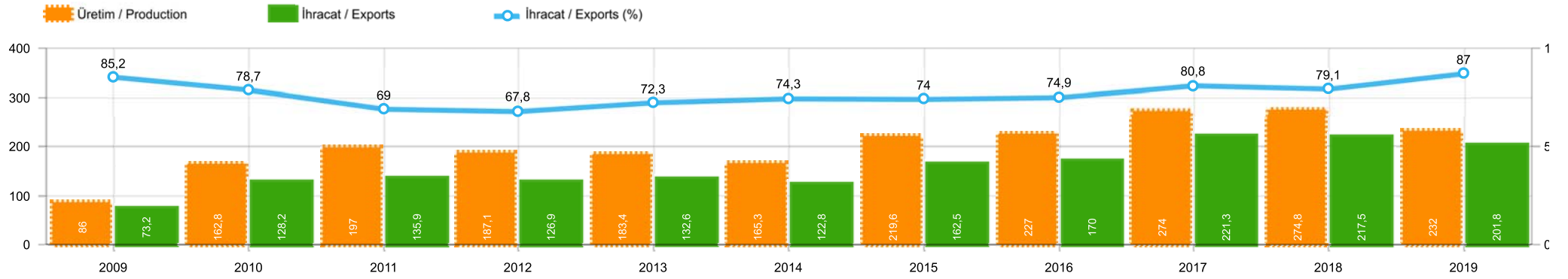
Ağır Ticari Araç Pazarının Analizi(x1000)(OCAK - ŞUBAT)
HCV Market Analysis(x1000)(January - February)



Aylar / Months	10 Yıl Ort / 10 Years Avr.	2019	%
1	1.803	474	-73,7
2	2.378	737	-69,0
TOPLAM / TOTAL	4.181	1.211	-71,0

Yıl / Year	1	2	3	4	5	6	7	8	9	10	11	12	1-2 Toplam / Total	Toplam / Total	1-2 Yerli / Local	1-2 İthal / Import	İthal Oran / Import %
2009	999	1.131	1.416	1.793	1.756	2.023	1.529	1.429	2.156	1.158	1.347	2.839	2.130	19.576	1.818	312	14,6
2010	975	1.159	2.250	2.295	2.460	2.615	2.666	3.197	3.226	3.349	3.526	6.865	2.134	34.583	1.722	412	19,3
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	6.790	51.048	4.692	2.098	30,9
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	4.821	43.538	3.572	1.249	25,9
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	4.866	43.814	3.805	1.061	21,8
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	4.719	45.686	3.839	880	18,6
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	6.531	51.046	5.219	1.312	20,1
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	3.671	30.558	2.538	1.133	30,9
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	2.937	30.635	2.254	683	23,3
2018	1.449	1.759	3.255	2.760	2.241	1.751	1.460	791	887	750	1.202	2.308	3.208	20.613	2.177	1.031	32,1
2019	474	737											1.211	1.211	863	348	28,7

İhracat / Üretim(x1000) (2009 - 2019 / 1 - 2)(Traktör Dahil)
Exports / Production(x1000) (2009 - 2019 / 1 - 2)(Including Tractors)



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
İhracat/Export	73.232	128.215	135.923	126.875	132.606	122.765	162.455	169.959	221.307	217.458	201.753
Üretim/Production	85.985	162.822	197.004	187.114	183.367	165.278	219.557	227.042	273.976	274.803	232.023
İhracat/Exports (%)	85,2	78,7	69	67,8	72,3	74,3	74	74,9	80,8	79,1	87

Taşıt Araçları İhracatı (2017 - 2019)
Motor Vehicle Exports (2017 - 2019)

SEKTÖR / SECTOR	2017	2018	1/2-2018	1/2-2019	2019/2018 %
OTOMOBİL / Pass.Car	921.354	875.147	149.187	128.147	-14,1
OTOMOBİL TOPLAM / Pass. Car Total	921.354	875.147	149.187	128.147	-14,1
KAMYON / Truck	7.800	14.478	1.633	2.849	74,5
KAMYONET / Pick Up	350.108	372.954	57.686	57.591	-0,2
OTOBÜS / Bus	7.028	7.708	976	1.167	19,6
MINİBÜS / Minibus	45.794	47.736	6.170	9.576	55,2
MİDİBÜS / Midibus	710	846	63	167	165,1
TİCARİ ARAÇLAR TOPLAM / Commercial Vehicle Total	411.440	443.722	66.528	71.350	7,2
TAŞIT ARAÇLARI TOPLAM / Motor Vehicles Total	1.332.794	1.318.869	215.715	199.497	-7,5
TRAKTÖR / F.Tractor	13.123	15.123	1.743	2.256	29,4
TRAKTÖR TOPLAM / F.Tractor Total	13.123	15.123	1.743	2.256	29,4
GENEL TOPLAM / GRAND TOTAL	1.345.917	1.333.992	217.458	201.753	-7,2

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

Üreticiler / Manufacturers	2017	2018	1-2 / 2018	1-2 / 2019
A.I.O.S.	700	964	43	210
FORD OTOSAN	296.840	328.502	51.912	57.733
HATTAT TRAKTÖR	1.100	621	25	111
HONDA TÜRKİYE	9.391	13.699	3.551	1.809
HYUNDAI ASSAN	204.382	190.347	28.370	25.464
KARSAN	2.969	3.419	522	182
M. BENZ TÜRK	9.865	16.309	1.924	3.071
MAN TÜRKİYE	2.007	2.425	455	298
OTOKAR	691	901	63	202
OYAK RENAULT	287.915	280.411	47.519	44.147
TEMSA	870	645	21	96
TOFAŞ	270.698	243.796	41.787	29.017
TOYOTA	246.466	237.451	39.548	37.268
TÜRK TRAKTÖR	12.023	14.502	1.718	2.145
GENEL TOPLAM / Grand Total	1.345.917	1.333.992	217.458	201.753

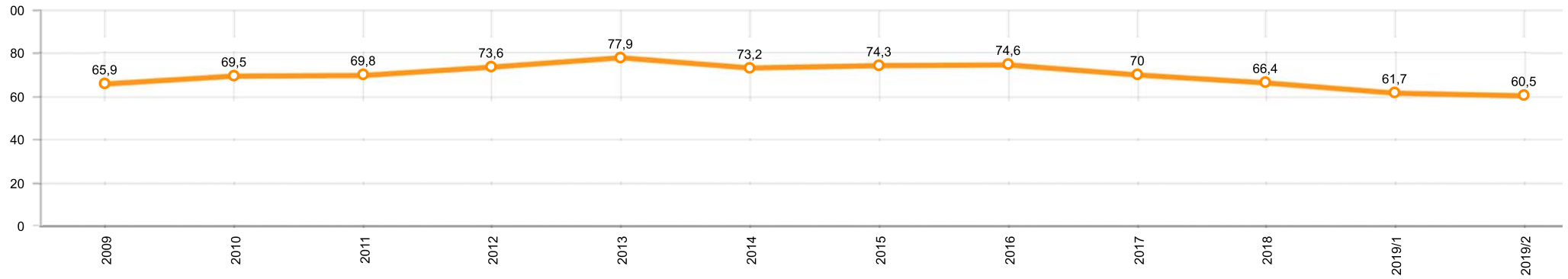
Otomotiv Ana ve Yan Sanayii İhracatı (ABD \$)
CBU and CKD Exports - \$

Sektör / Sector	2017	2018	OCAK - ŞUBAT / January - February 2018	OCAK - ŞUBAT / January - February 2019	2019 / 2018 %
Toplam Yan Sanayi / Total Component Industry	9.835.914.658	10.881.562.512	1.852.673.971	1.780.072.537	-3,9
İç ve Dış Lastik / Tyres	1.131.782.300	1.353.896.118	225.017.445	236.479.693	5,1
Emniyet Camı / Safety Glasses	136.486.099	151.148.689	26.135.240	23.643.409	-9,5
Motor / Engine	486.426.738	581.983.113	115.085.974	89.171.740	-22,5
Akümülatör / Batteries	295.794.286	388.107.835	45.910.752	60.960.280	32,8
Diğer Aksam ve Parça / Spare Parts&Components	7.785.425.235	8.406.426.757	1.440.524.560	1.369.817.415	-4,9
Toplam Ana Sanayi / Total Vehicle Industry	19.257.086.833	21.350.315.330	3.324.749.637	3.179.034.330	-4,4
Otobüs / Bus	1.308.249.224	1.503.188.826	201.874.009	290.528.683	43,9
Midibüs-Minibüs / Midibus-Minibus	217.704.499	215.450.022	33.368.185	16.065.623	-51,9
Otomobil / P.Cars	11.790.577.760	12.420.951.066	2.018.479.631	1.764.830.420	-12,6
Kamyon-Kamyonet / Truck-Pick Up&Van	4.849.022.718	5.376.446.529	857.921.098	801.259.241	-6,6
Römork ve Yarı Römork / Trailer-Semi Trailer	342.793.231	507.186.149	66.007.541	76.288.992	15,6
Çekici / Tractor	427.928.256	904.738.051	108.049.493	173.356.640	60,4
Tarım Traktörü / Farm Tractor	320.811.145	422.354.687	39.049.680	56.704.731	45,2
Toplam / Total	29.093.001.491	32.231.877.842	5.177.423.608	4.959.106.867	-4,2

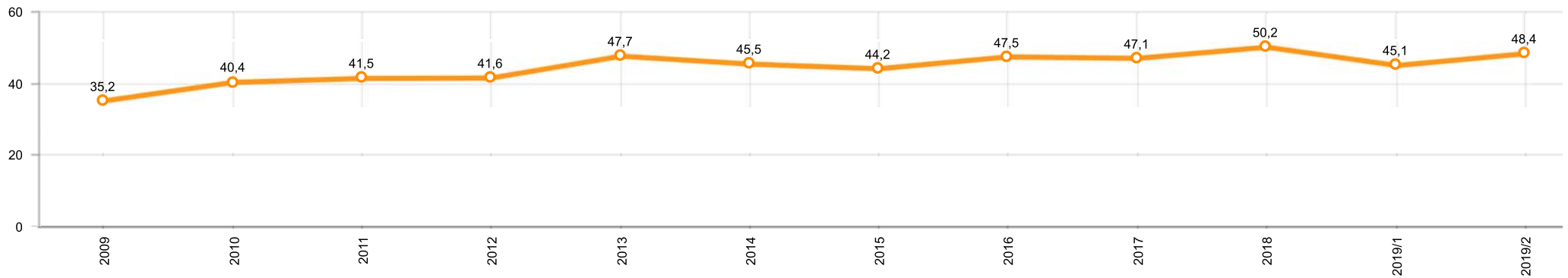
Kaynak: Uludağ İhracatçı Birlikleri . ÜİB tarafından OSD için özel olarak analiz edilen Otomotiv İhracatı kapsamında; ÜİB Türkiye Geneli Otomotiv Endüstrisi sınıflandırmasına kıyasla “Römork ve Yarı Römork” , “Tarım Traktörü” verileri dahil edilmekte; “Kullanılmış Araçlar” ,”İki Tekerlekli Taşıtlar”,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



2019 Otomotiv Sanayii Dış Satışlar
2019 Automotive Industry Exports Sales

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 2 / 2019

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Araç Tipleri / Vehicle Types	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
OTOMOBİL - Pass.Car	58.807	69.340											128.147
KAMYON - H. Truck	1.255	1.594											2.849
KAMYONET - Pick Up	27.735	29.856											57.591
OTOBÜS - Bus	801	366											1.167
MINİBÜS - Minibus	4.741	4.835											9.576
MİDİBÜS - Midibus	74	93											167
TİCARİ ARAÇLAR TOPLAMI - CV Total	34.606	36.744											71.350
TAŞIT ARAÇLARI TOPLAMI - MV Total	93.413	106.084											199.497
TRAKTÖR - F.Tractor	1.111	1.145											2.256
GENEL TOPLAM - Grand Total	94.524	107.229											201.753

Otomobil / P.Car

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
FORD OTOSAN	1.469	1.837	-	-	-	-	-	-	-	-	-	-	3.306
HONDA TÜRKİYE	800	1.009	-	-	-	-	-	-	-	-	-	-	1.809
HYUNDAI ASSAN	11.414	14.050	-	-	-	-	-	-	-	-	-	-	25.464
OYAK RENAULT	20.009	24.138	-	-	-	-	-	-	-	-	-	-	44.147
TOFAŞ	7.636	8.517	-	-	-	-	-	-	-	-	-	-	16.153
TOYOTA	17.479	19.789	-	-	-	-	-	-	-	-	-	-	37.268
TOPLAM - Total	58.807	69.340	-	-	-	-	-	-	-	-	-	-	128.147

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	22.083	22.516	-	-	-	-	-	-	-	-	-	-	44.599
KARSAN	73	55	-	-	-	-	-	-	-	-	-	-	128
OTOKAR	-	-	-	-	-	-	-	-	-	-	-	-	-
TOFAŞ	5.579	7.285	-	-	-	-	-	-	-	-	-	-	12.864
TOPLAM - Total	27.735	29.856	-	-	-	-	-	-	-	-	-	-	57.591

Minibüs / Minibus

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
FORD OTOSAN	4.740	4.833	-	-	-	-	-	-	-	-	-	-	9.573
KARSAN	1	2	-	-	-	-	-	-	-	-	-	-	3
TOPLAM - Total	4.741	4.835	-	-	-	-	-	-	-	-	-	-	9.576

Kamyon / Truck

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	-	30	-	-	-	-	-	-	-	-	-	-	30
FORD OTOSAN	114	141	-	-	-	-	-	-	-	-	-	-	255
KARSAN	-	-	-	-	-	-	-	-	-	-	-	-	-
M. BENZ TÜRK	1.141	1.423	-	-	-	-	-	-	-	-	-	-	2.564
OTOKAR	-	-	-	-	-	-	-	-	-	-	-	-	-
TOPLAM - Total	1.255	1.594	-	-	-	-	-	-	-	-	-	-	2.849

Midibüs / Midibus

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	52	60	-	-	-	-	-	-	-	-	-	-	112
KARSAN	5	6	-	-	-	-	-	-	-	-	-	-	11
OTOKAR	8	21	-	-	-	-	-	-	-	-	-	-	29
TEMSA	9	6	-	-	-	-	-	-	-	-	-	-	15
TOPLAM - Total	74	93	-	-	-	-	-	-	-	-	-	-	167

Otobüs / Bus

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
A.I.O.S.	56	12	-	-	-	-	-	-	-	-	-	-	68
KARSAN	23	17	-	-	-	-	-	-	-	-	-	-	40
M. BENZ TÜRK	261	246	-	-	-	-	-	-	-	-	-	-	507
MAN TÜRKİYE	298	-	-	-	-	-	-	-	-	-	-	-	298
OTOKAR	104	69	-	-	-	-	-	-	-	-	-	-	173
TEMSA	59	22	-	-	-	-	-	-	-	-	-	-	81
TOPLAM - Total	801	366	-	-	-	-	-	-	-	-	-	-	1.167

Traktör / F.Tractor

Firmalar / Firms	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
HATTAT TRAKTÖR	39	72	-	-	-	-	-	-	-	-	-	-	111
TÜRK TRAKTÖR	1.072	1.073	-	-	-	-	-	-	-	-	-	-	2.145
TOPLAM - Total	1.111	1.145	-	-	-	-	-	-	-	-	-	-	2.256

2019 Yılı İthal Otomobil Satışları
2019 P.Cars Import Sales

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 2 / 2019
Automotive Industry Monthly Report 2 / 2019

Firmalar / Firms	2018 Toplam / Total	1	2	3	4	5	6	7	8	9	10	11	12	Toplam / Total
Alfa Romeo	203	8	16	-	-	-	-	-	-	-	-	-	-	24
Aston Martin	16	2	-	-	-	-	-	-	-	-	-	-	-	2
Audi	13.295	495	404	-	-	-	-	-	-	-	-	-	-	899
Bentley	10	2	-	-	-	-	-	-	-	-	-	-	-	2
BMW	12.728	352	463	-	-	-	-	-	-	-	-	-	-	815
Citroen	7.669	80	97	-	-	-	-	-	-	-	-	-	-	177
Dacia	26.193	429	801	-	-	-	-	-	-	-	-	-	-	1.230
DS	236	3	8	-	-	-	-	-	-	-	-	-	-	11
Ferrari	18	-	2	-	-	-	-	-	-	-	-	-	-	2
Fiat	1.264	26	26	-	-	-	-	-	-	-	-	-	-	52
Ford	20.697	235	476	-	-	-	-	-	-	-	-	-	-	711
Honda	4.862	144	149	-	-	-	-	-	-	-	-	-	-	293
Hyundai	19.113	794	1.195	-	-	-	-	-	-	-	-	-	-	1.989
Infinity	18	-	-	-	-	-	-	-	-	-	-	-	-	-
Jaguar	220	2	18	-	-	-	-	-	-	-	-	-	-	20
Jeep	2.430	100	162	-	-	-	-	-	-	-	-	-	-	262
Kia	7.694	150	331	-	-	-	-	-	-	-	-	-	-	481
Lamborghini	3	1	-	-	-	-	-	-	-	-	-	-	-	1
Land Rover	1.248	36	71	-	-	-	-	-	-	-	-	-	-	107
Lexus	56	4	4	-	-	-	-	-	-	-	-	-	-	8
Maserati	55	2	4	-	-	-	-	-	-	-	-	-	-	6
Mazda	1.005	29	29	-	-	-	-	-	-	-	-	-	-	58
Mercedes-Benz	14.445	204	701	-	-	-	-	-	-	-	-	-	-	905
Mini	1.373	17	50	-	-	-	-	-	-	-	-	-	-	67
Mitsubishi	514	38	60	-	-	-	-	-	-	-	-	-	-	98
Nissan	24.605	538	799	-	-	-	-	-	-	-	-	-	-	1.337
Opel	20.960	348	765	-	-	-	-	-	-	-	-	-	-	1.113
Peugeot	24.905	524	767	-	-	-	-	-	-	-	-	-	-	1.291
Porsche	565	9	35	-	-	-	-	-	-	-	-	-	-	44
Renault	21.090	198	557	-	-	-	-	-	-	-	-	-	-	755
Seat	10.383	139	289	-	-	-	-	-	-	-	-	-	-	428
Skoda	21.340	247	585	-	-	-	-	-	-	-	-	-	-	832
Smart	35	5	3	-	-	-	-	-	-	-	-	-	-	8
Ssangyong	222	10	15	-	-	-	-	-	-	-	-	-	-	25
Subaru	1.471	52	68	-	-	-	-	-	-	-	-	-	-	120
Suzuki	2.878	65	107	-	-	-	-	-	-	-	-	-	-	172
Toyota	3.405	47	114	-	-	-	-	-	-	-	-	-	-	161
Volkswagen	49.749	1.210	2.218	-	-	-	-	-	-	-	-	-	-	3.428
Volvo	5.943	231	225	-	-	-	-	-	-	-	-	-	-	456
GENEL TOPLAM - Grand Total	322.916	6.776	11.614	-	-	-	-	-	-	-	-	-	-	18.390

2019 Yılı İthal Hafif Ticari Araç Satışları
2019 Light Commercial Vehicles Import Sales

											10	11	12	Toplam / Total
Firmalar / Firms	2018 Toplam / Total	1	2	3	4	5	6	7	8	9	10	11	12	24
Citroen	4.633	126	188	-	-	-	-	-	-	-	-	-	-	2
Dacia	3.725	53	182	-	-	-	-	-	-	-	-	-	-	235
Fiat	3.019	53	54	-	-	-	-	-	-	-	-	-	-	107
Ford	2.783	134	106	-	-	-	-	-	-	-	-	-	-	240
Hyundai	1.493	83	106	-	-	-	-	-	-	-	-	-	-	189
Isuzu	578	3	30	-	-	-	-	-	-	-	-	-	-	33
Iveco	1.598	48	54	-	-	-	-	-	-	-	-	-	-	102
Karsan	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kia	1.947	14	55	-	-	-	-	-	-	-	-	-	-	69
Mercedes-Benz	7.993	159	404	-	-	-	-	-	-	-	-	-	-	563
Mitsubishi	3.445	47	129	-	-	-	-	-	-	-	-	-	-	176
Nissan	1.741	82	48	-	-	-	-	-	-	-	-	-	-	130
Peugeot	5.247	197	284	-	-	-	-	-	-	-	-	-	-	481
Renault	8.908	180	342	-	-	-	-	-	-	-	-	-	-	522
Toyota	3.159	55	101	-	-	-	-	-	-	-	-	-	-	156
Volkswagen	17.085	295	662	-	-	-	-	-	-	-	-	-	-	957
GENEL TOPLAM - Grand Total	67.354	1.529	2.745	-	-	-	-	-	-	-	-	-	-	4.274