

AYLIK RAPOR

Automotive Industry Monthly Report

Ağustos / August 2017

- **Üretim / Production**
- **Satış / Sales**
- **İthalat / Imports**
- **İhracat / Exports**

2017 Ağustos Ayı Özeti / 2017 August Summary

	AĞUSTOS / AUGUST			8 AY/ 8 MONTHS			SON 12 AYLIK / YoY		
	2016	2017	2017/2016 (%)	2016	2017	2017/2016 (%)	2016	2017	2017/2016 (%)
Üretim/ Production	Toplam/Total	78.086	71.463	-8	914.884	1.089.595	1.416.383	1.660.669	17
	Otomobil/ P.Cars	52.296	50.453	-4	562.692	750.024	854.067	1.138.244	33
Pazar/Market	Toplam/Total	73.269	74.278	1	583.771	569.076	968.388	993.164	3
	Otomobil/ P.Cars	53.977	54.890	2	438.025	423.198	709.804	742.111	5
İthalat/Import	Toplam/Total	52.865	50.439	-5	397.389	363.951	642.846	647.872	1
	Otomobil/ P.Cars	43.766	40.434	-8	330.302	294.037	529.736	528.780	0
İhracat/Export	Toplam/Total	70.150	61.299	-13	705.501	889.656	1.080.911	1.325.524	23
	Otomobil/ P.Cars	51.748	44.926	-13	440.197	625.010	667.910	930.522	39
İhracat / Export (\$)	Toplam/Total **	1.706.885.055	1.891.783.534	11	15.382.804.159	18.912.395.603	23.213.734.203	27.800.878.909	20
	Otomobil/ P.Cars	585.858.940	645.095.753	10	4.763.214.974	7.794.556.743	7.235.462.565	11.374.349.555	57

PARAMETRELER / PARAMETERS	AĞUSTOS / AUGUST			8 AY/ 8 MONTHS			SON 12 AYLIK / YoY		
	2016	2017	2017/2016 (%)	2016	2017	2017/2016 (%)	2016	2017	2017/2016 (%)
ÜFE/PPI	0,08	0,85	**	3,49	9,52	**	4,51	12,05	**
TÜFE/CPI	-0,29	0,52	**	4,53	6,60	**	7,98	9,66	**
Sanayi Endeksi/ Industry Index	0,38	0,86	**	4,68	10,15	**	5,44	13,82	**
\$ (*)	2,9650	3,4766	17	2,9124	3,5775	23	2,9158	3,4487	18
EURO (*)	3,3065	4,1465	25	3,2394	3,9578	22	3,2285	3,7976	18
Japon Yeni (*)	2,8698	3,1589	10	2,6405	3,1752	20	2,5613	3,1006	21

(*) Ortalama Değerler / Average Values

(**) Toplam Sanayi / Total Industry Including Components

Raporda yer alan üretim adetleri yalnızca OSD üyelerinin verilerini göstermektedir.
Production units in this report only show the data of OSD members.

2016/2017 Yılları Üretim

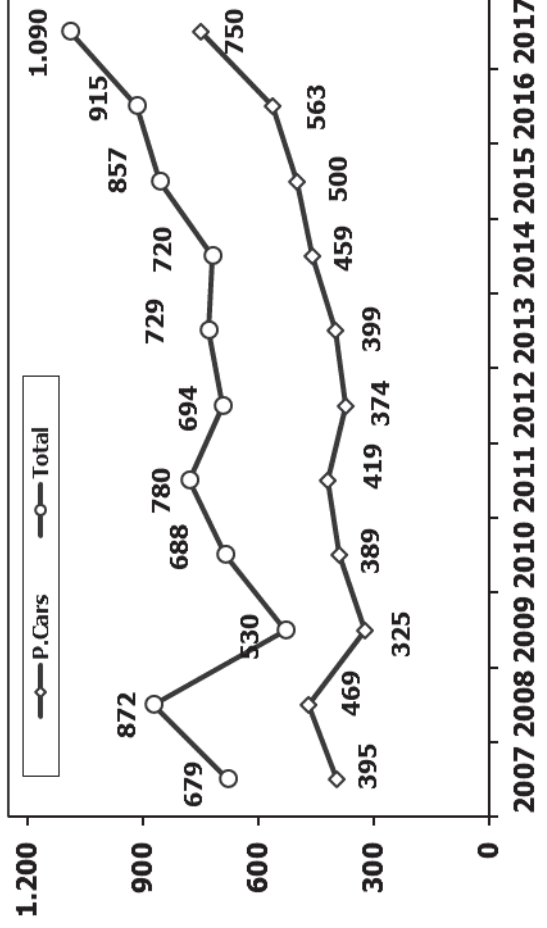
2016/2017 Production

K.KAMYON : AYA 3.5-12 Ton (L.Truck:GVW 3.5-12 Ton)
B.KAMYON : AYA 12 Ton'dan Büyük (M.Truck:GVW 12 Ton And Up)

ARAÇ TİPLERİ	AĞUSTOS AYI ÜRETİMİ August Production		8 AYLIK ÜRETİM 8 Months Production		DEĞİŞİM % Percent Change %	
	2016	2017	2016	2017	AĞUSTOS August	8 AY 8 Months
OTOMOBİL - Pass.Car	52.296	50.453	562.692	750.024	-4	33
TİCARİ ARAÇLAR - Commercial Vehicles	25.790	21.010	352.192	339.571	-19	-4
* B. KAMYON - H. Truck	836	796	10.096	10.718	-5	6
* K. KAMYON - L. Truck	304	272	1.514	2.054	-11	36
* KAMYONET - Pick Up	20.977	16.668	306.319	283.907	-21	-7
* OTOBÜS - Bus	627	580	5.592	5.869	-7	5
* MİNİBÜS - Minibus	2.606	2.377	26.369	35.030	-9	33
* MİDİBÜS - Midibus	440	317	2.302	1.993	-28	-13
TAŞIT ARAÇLARI TOPLAM - MV Total	78.086	71.463	914.884	1.089.595	-8	19
TRAKTÖR - F.Tractor	1.581	3.853	35.601	33.824	144	-5
GENEL TOPLAM - Grand Total	79.667	75.316	950.485	1.123.419	-5	18

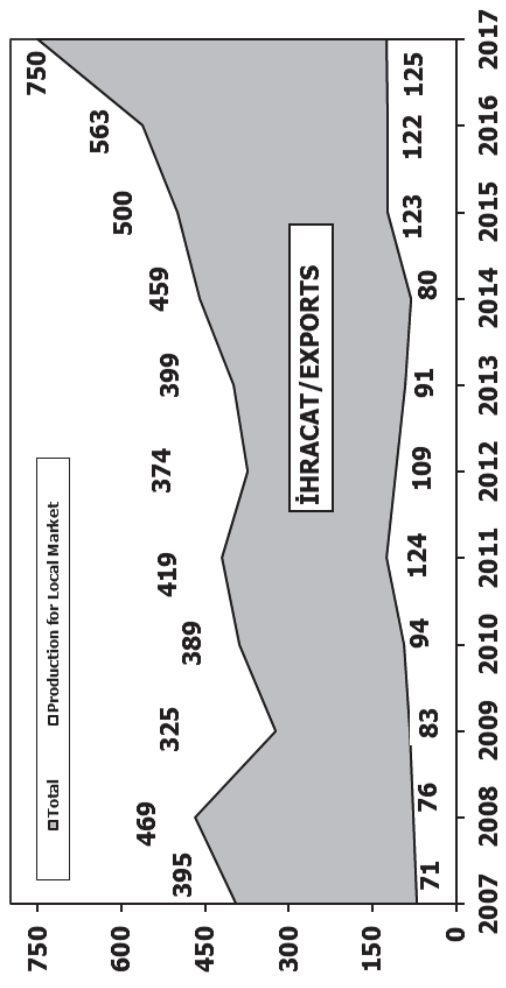
Toplam Üretim ve Otomobil Üretimi (x1000) (Ocak-Ağustos)

Total & P.Cars Production (x1000) (January-August)

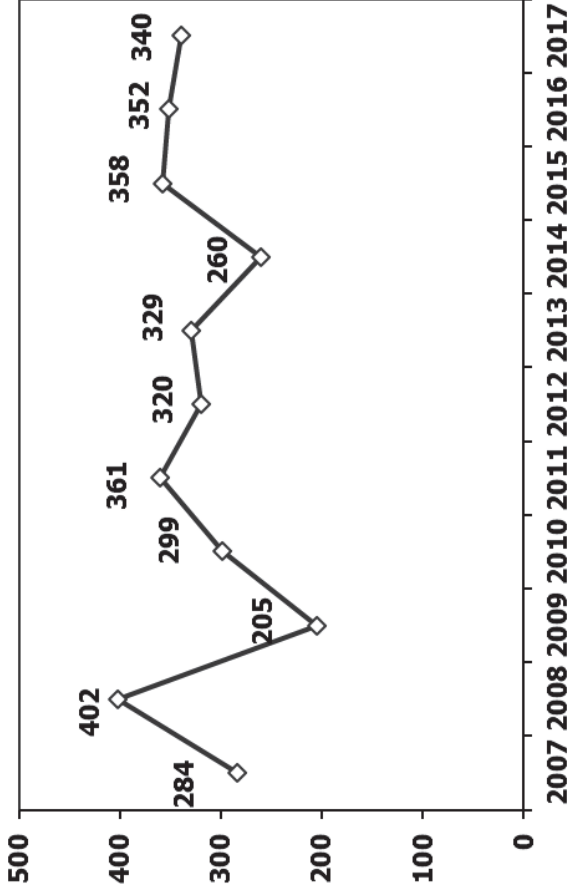


Otomobil Üretimi ve İhracat (x1000) (Ocak-Ağustos)

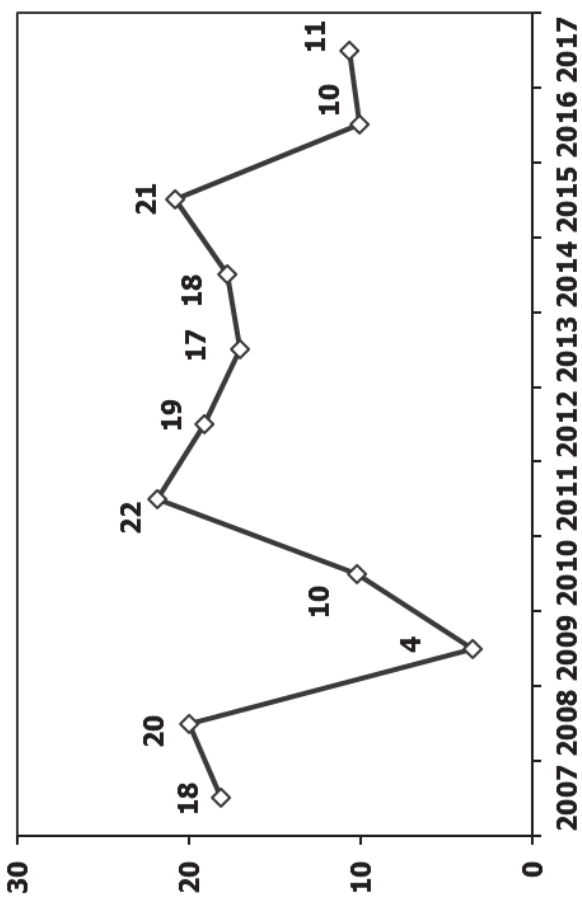
P.Cars Production & Exports (x1000) (January-August)



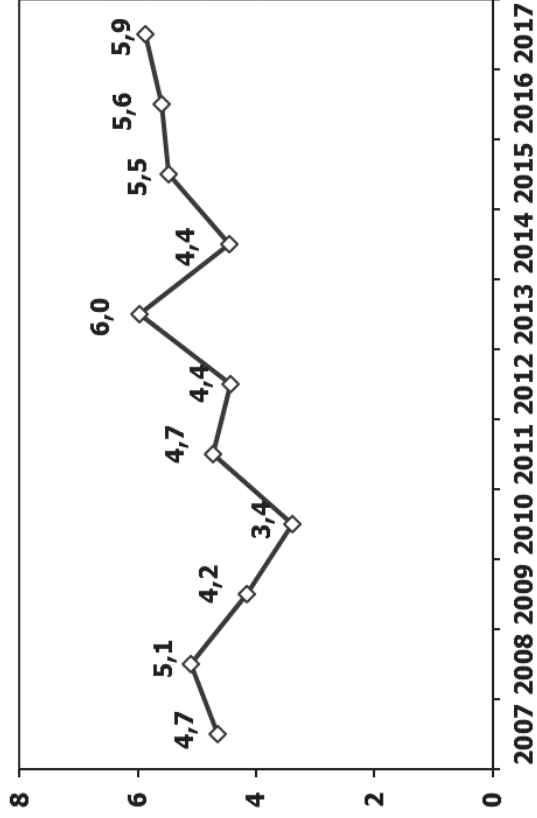
Ticari Araç Üretimi (x1000) (Ocak-Ağustos)
Commercial Vehicle Production (x1000) (January-August)



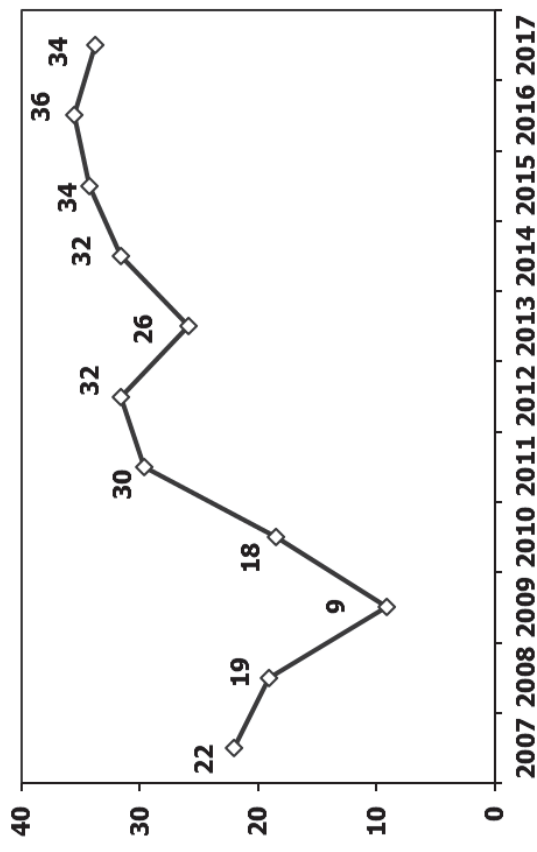
(AYA >12 Ton) **Büyük Kamyon Üretimi** (x1000) (Ocak-Ağustos)
(GVW >12 Ton) Heavy Truck Production (x1000) (January-August)



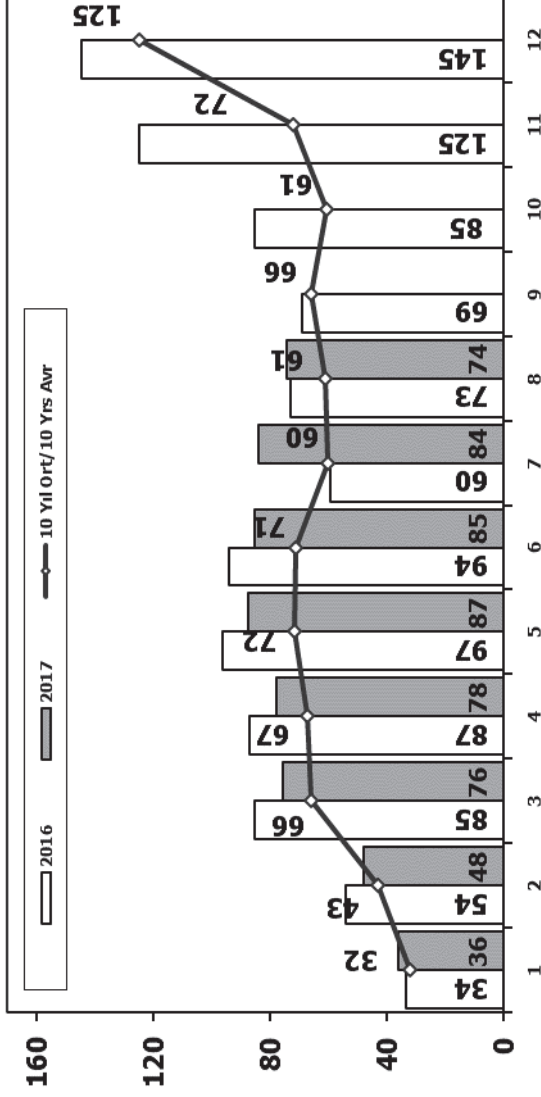
Otobüs Üretimi (x1000) (Ocak-Ağustos)
Bus Production (x1000) (January-August)



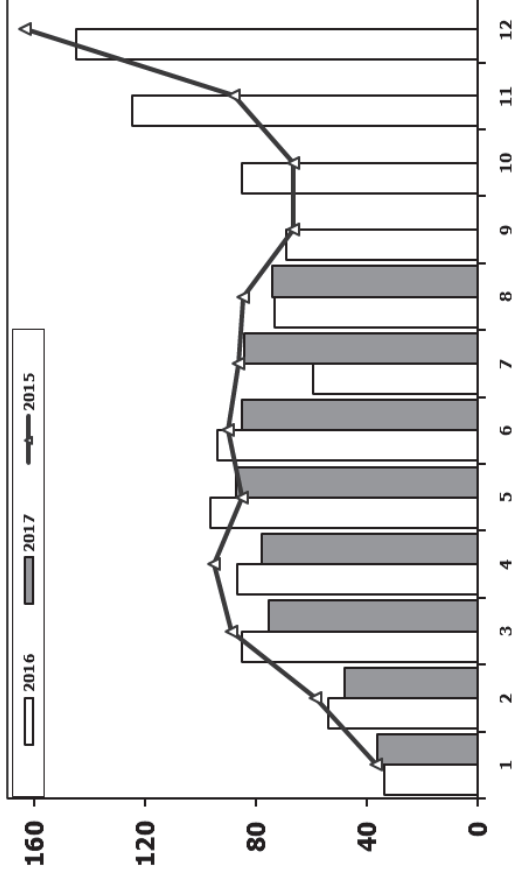
Traktör Üretimi (x1000) (Ocak-Ağustos)
F. Tractor Production (x1000) (January-August)



Toplam Pazarın Analizi (x1000) Total Market Analysis (x1000)



Toplam Pazar (x1000) Total Market (x1000)

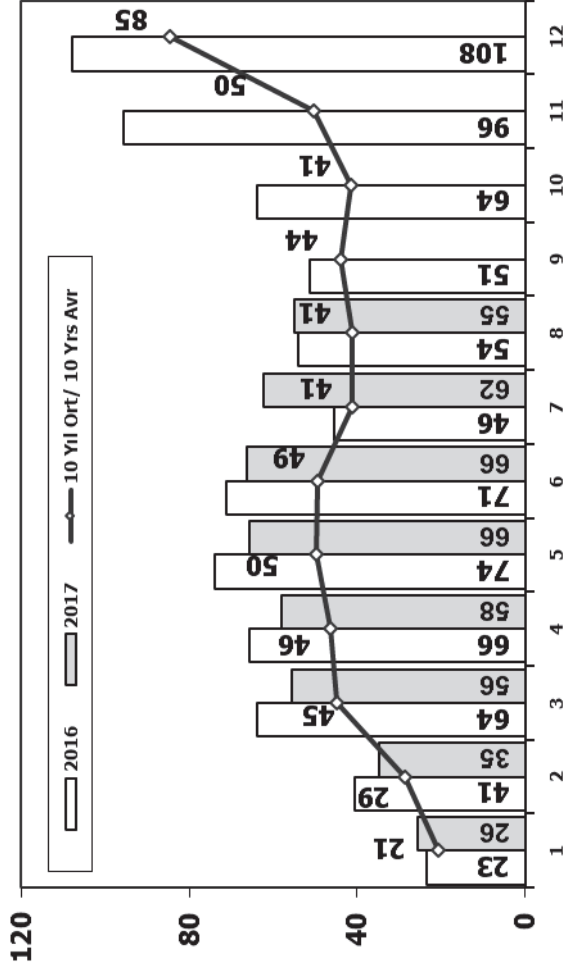


Aylar / Months	10 Yıl Ort. / 10 Yrs Avr. (x1000)	2017 (x1000)	%
1	32,1	36,1	12,6
2	43,2	48,1	11,4
3	66,3	75,6	14,0
4	67,2	77,8	15,8
5	71,8	87,5	21,8
6	71,5	85,4	19,5
7	60,2	84,2	39,8
8	61,3	74,3	21,2
Total	473,7	569,1	20,1

	1	2	3	4	5	6	7	8	9	10	11	12	8 Ay/Mo	Total
2007	24.950	31.702	45.488	45.633	51.255	51.661	50.117	54.171	50.078	56.058	67.017	106.076	354.977	634.206
2008	33.792	38.121	56.814	50.967	51.627	49.393	44.692	46.592	46.829	35.147	28.152	44.418	371.998	526.544
2009	20.631	22.846	56.531	54.426	64.887	63.102	30.246	37.092	83.403	22.117	29.202	91.386	349.761	575.869
2010	21.050	32.313	53.828	57.079	61.628	63.390	63.718	64.645	66.601	76.780	77.406	154.734	417.651	793.172
2011	47.658	62.348	83.333	82.071	85.093	85.863	65.364	61.378	63.643	72.640	67.195	134.281	573.108	910.867
2012	31.219	43.827	68.957	66.014	74.820	74.781	65.122	60.848	73.197	62.677	75.045	121.113	485.588	817.620
2013	37.140	50.931	72.688	77.015	85.421	77.771	74.726	67.383	71.037	60.399	83.017	135.596	543.075	893.124
2014	34.225	37.308	50.964	56.766	61.909	63.952	62.206	62.839	70.180	69.259	83.937	153.941	430.169	807.486
2015	36.576	58.533	89.121	95.431	85.145	90.463	86.625	84.683	66.622	66.520	88.043	163.432	626.577	1.011.194
2016	33.740	54.223	85.214	87.041	96.576	94.203	59.505	73.269	69.068	85.251	124.839	144.928	583.771	1.007.857
2017	36.146	48.141	75.581	77.849	87.476	85.416	84.189	74.278					569.076	569.076

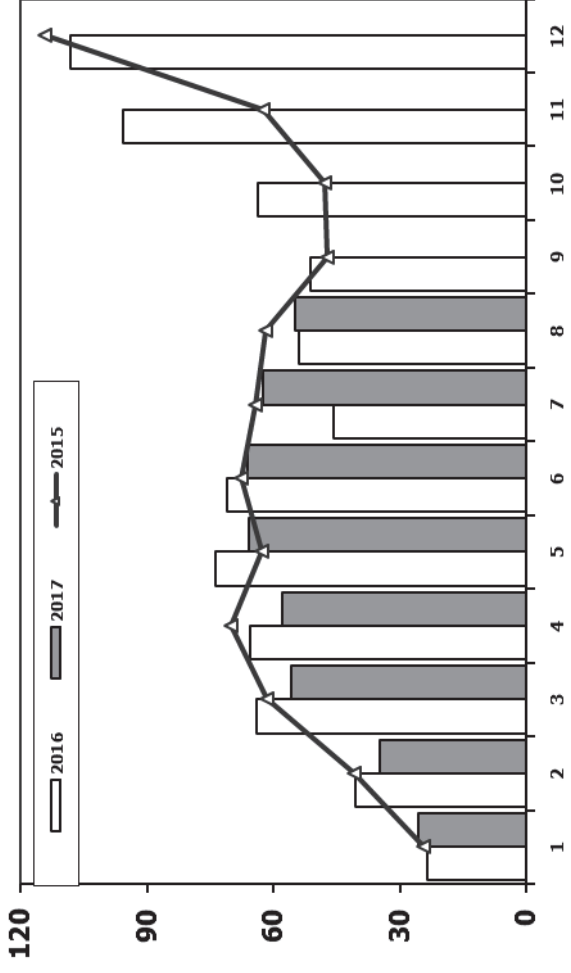
Otomobil Pazarının Analizi (x1000)

P.Cars Market Analysis (x1000)



Otomobil Pazarı (x1000)

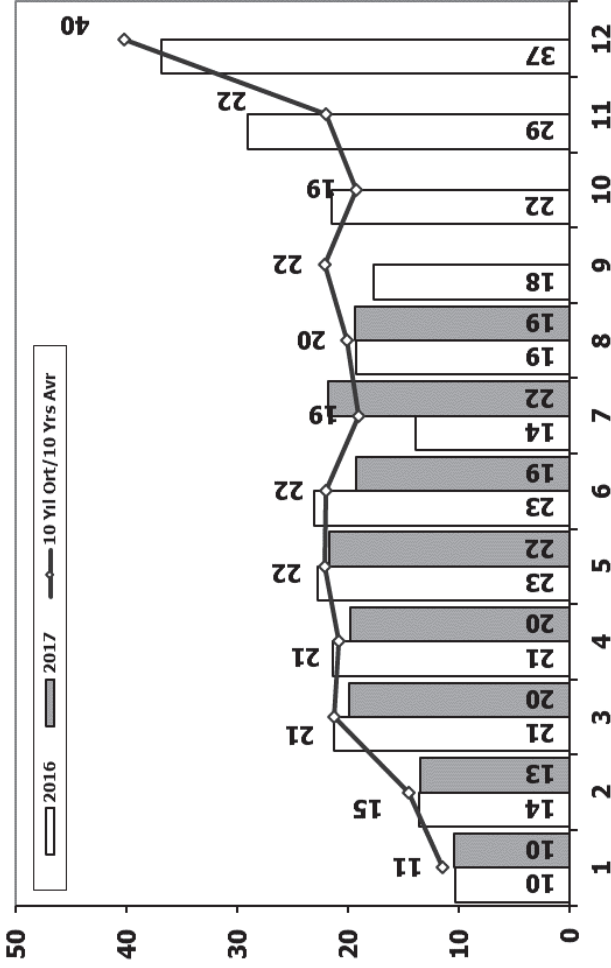
P.Cars Market (x1000)



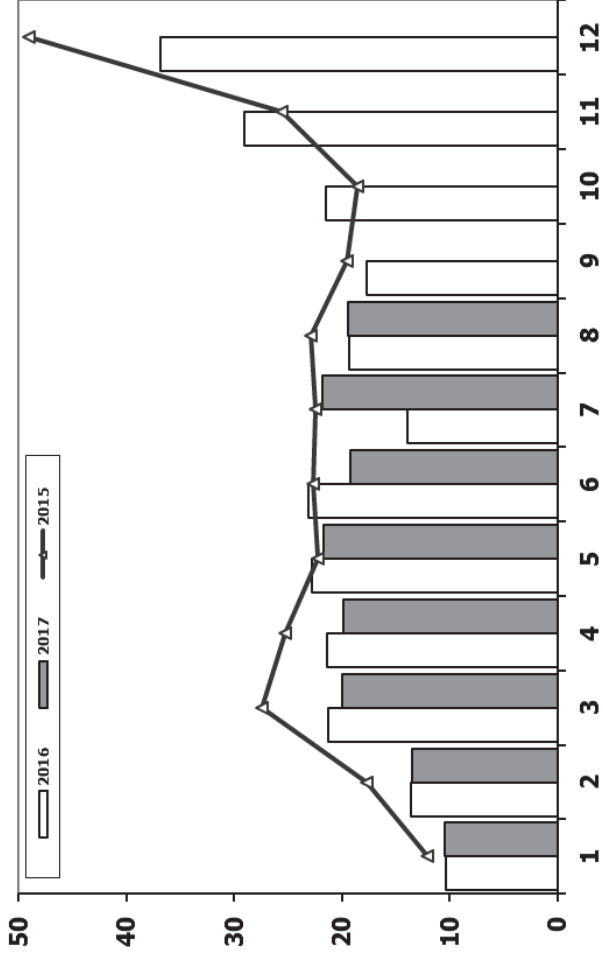
	1	2	3	4	5	6	7	8	9	10	11	12	8 Ay/Mo	Total
2007	13.186	17.212	24.336	25.204	29.067	30.126	28.246	28.469	27.662	32.569	39.643	61.745	195.846	357.465
2008	18.588	21.196	34.147	30.313	31.477	28.724	25.530	26.102	27.053	19.788	17.201	25.879	216.077	305.998
2009	13.173	14.492	40.622	36.202	44.188	41.019	16.637	22.537	52.162	13.828	17.781	57.178	228.870	369.819
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	269.926	509.784
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
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
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
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
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
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
2017	25.689	34.658	55.616	57.998	65.799	66.164	62.384	54.890					423.198	423.198

Aylar / Months	10 Yıl Ort. / 10 Yrs Avr. (x1000)	2017 (x1000)	%
1	20,7	25,7	24,4
2	28,7	34,7	20,7
3	45,0	55,6	23,7
4	46,3	58,0	25,2
5	49,7	65,8	32,3
6	49,4	66,2	33,9
7	41,2	62,4	51,4
8	41,2	54,9	33,3
Total	322,2	423,2	31,4

Ticari Araç Pazarının Analizi (x1000) CV Market Analysis (x1000)



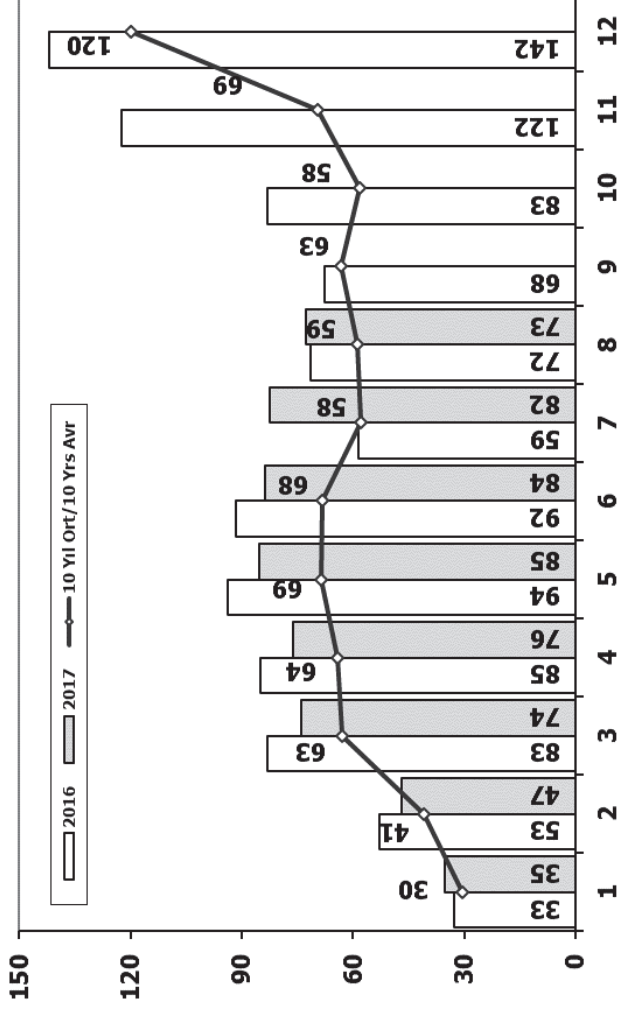
Ticari Araç Pazarı (x1000) CV Total Market (x1000)



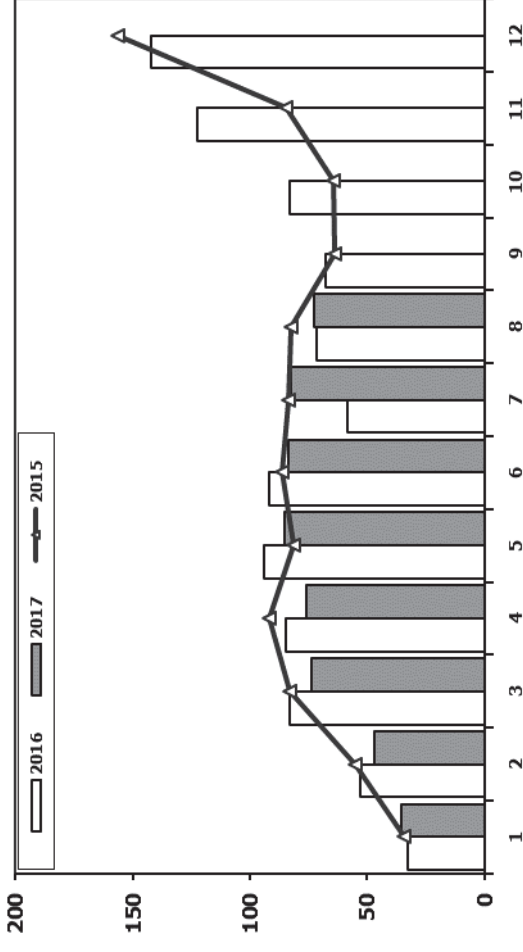
Aylar / Months	10 Yıl Ort. 10 Yrs Avr. (x1000)	2017 (x1000)	%
1	11,4	10,5	-8,6
2	14,5	13,5	-7,0
3	21,3	20,0	-6,4
4	20,9	19,9	-5,1
5	22,1	21,7	-1,9
6	22,1	19,3	-12,7
7	19,0	21,8	14,5
8	20,1	19,4	-3,5
Total	151,5	145,9	-3,7

2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	1	2	3	4	5	6	7	8	9	10	11	12	8 Ay/Mo	Total
11.764	15.204	7.458	8.456	17.790	10.142	11.305	9.857	12.078	10.382	10.457	11.764	16.925	22.667	20.429	22.188	21.535	21.871	25.702	22.416	23.489	27.374	44.331	159.131	276.741
15.204	16.925	8.354	11.662	23.344	10.142	14.638	10.141	17.716	13.635	13.483	16.925	22.667	20.429	20.654	20.150	20.669	19.162	20.490	19.776	15.359	10.951	18.539	155.921	220.546
7.458	8.354	18.224	20.530	28.236	20.369	20.016	13.997	25.220	21.239	19.851	22.083	15.909	19.870	18.224	20.699	22.083	13.609	14.555	31.241	8.289	11.421	34.208	120.891	206.050
8.456	11.662	20.530	28.236	28.791	24.360	20.016	13.997	25.220	21.239	19.851	21.161	15.909	19.870	18.224	20.699	22.083	13.609	14.555	24.124	28.921	27.345	55.273	147.725	283.388
17.790	23.344	28.236	28.791	28.791	24.360	20.016	13.997	25.220	21.239	19.851	28.791	23.344	29.310	28.236	28.791	29.149	21.846	22.503	23.679	25.132	22.244	45.324	200.969	317.348
10.142	14.638	20.369	20.369	24.360	24.360	20.016	13.997	25.220	21.239	19.851	23.932	19.481	20.591	20.591	23.932	19.481	19.014	19.612	23.837	19.237	22.748	40.187	155.331	261.340
11.305	14.117	20.016	20.016	20.016	23.038	20.016	13.997	25.220	21.239	19.851	19.481	19.014	20.591	20.591	23.932	19.481	19.014	15.772	18.112	13.414	18.900	34.397	143.646	228.469
9.857	10.141	13.997	13.997	15.530	16.674	16.674	15.604	22.407	22.930	19.292	16.674	15.604	15.604	15.604	22.697	22.697	22.407	17.708	20.918	18.445	24.242	43.887	112.663	220.155
12.078	17.716	27.445	27.445	25.220	22.267	22.267	22.407	22.407	22.930	19.292	22.697	22.407	22.407	22.407	22.267	22.267	22.407	22.930	19.534	18.566	25.646	49.092	172.760	285.598
10.382	13.635	21.239	21.239	21.423	22.744	22.744	22.407	22.407	22.930	19.292	23.092	22.407	22.407	22.407	22.744	23.092	13.939	19.292	17.728	21.505	29.056	36.884	145.746	250.919
10.457	13.483	19.965	19.965	19.851	21.677	21.677	21.805	21.805	19.388	19.388	19.252	21.805	21.805	19.851	21.677	19.252	21.805	19.388					145.878	145.878

Hafif Araç Pazarının Analizi (x1000) LV Market Analysis (x1000)



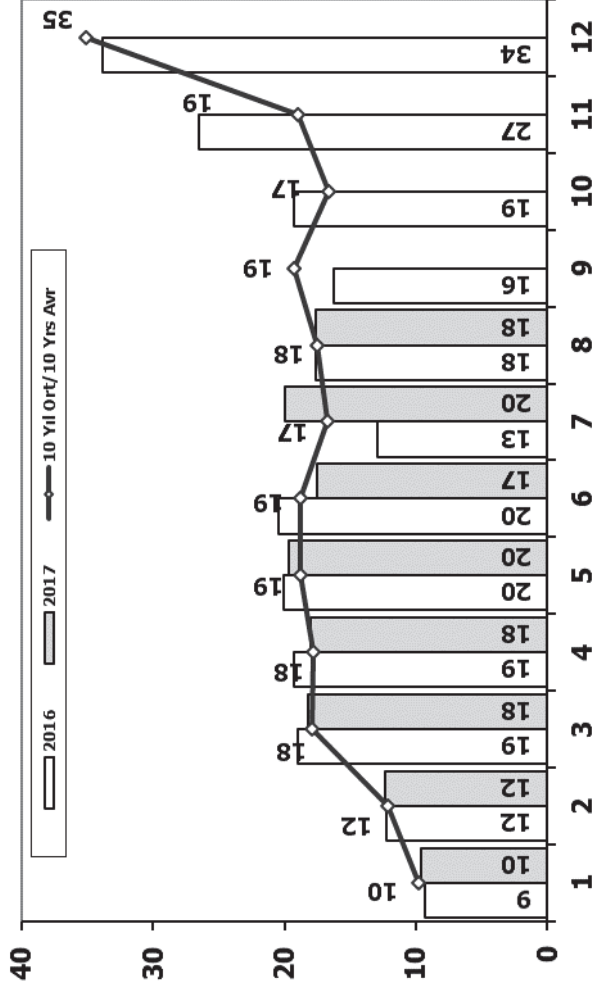
Hafif Araç Pazarı (x1000) LV Total Market (x1000)



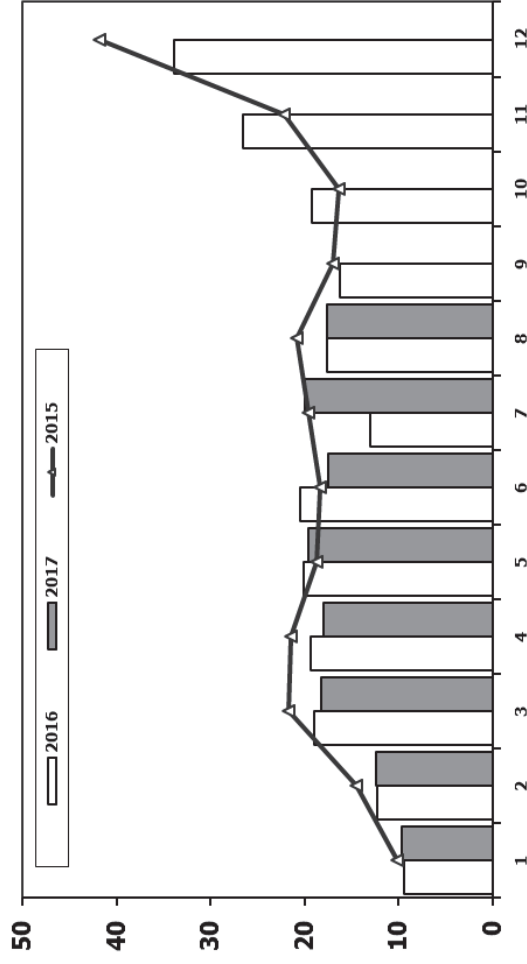
Aylar / Months	10 Yıl Ort. 10 Yrs Avr. (x1000)	2017 (x1000)	%
1	30,4	35,3	16,1
2	40,9	47,0	14,9
3	62,8	73,8	17,5
4	64,2	76,0	18,4
5	68,6	85,4	24,6
6	68,2	83,7	22,7
7	57,9	82,3	42,1
8	58,8	72,5	23,5
Total	451,7	556,0	23,1

2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Total
23.117	31.527	19.606	20.095	44.892	29.545	35.523	32.670	34.615	32.713	35.323	594.762
29.184	35.251	21.742	31.172	58.663	41.324	48.307	35.021	55.331	52.825	46.965	594.762
41.890	53.649	55.111	51.769	78.403	64.884	68.774	47.581	83.302	82.948	73.802	594.762
42.366	47.701	52.640	54.946	77.695	62.949	73.575	53.305	91.602	84.887	75.988	594.762
47.938	48.598	63.191	59.377	80.646	70.863	81.468	81.468	81.542	93.904	85.422	594.762
46.324	46.324	61.067	60.896	81.573	71.067	74.096	74.096	86.158	91.540	83.658	594.762
43.932	43.932	81.397	63.814	60.129	58.148	65.043	60.199	64.025	67.593	72.536	594.762
46.581	46.581	63.814	61.345	61.764	58.406	62.304	60.199	82.577	71.556	82.297	594.762
52.725	32.884	21.033	73.404	69.421	69.629	59.938	58.014	66.573	83.000	555.991	594.762
63.313	26.253	27.962	73.962	63.657	127.910	115.400	79.301	146.989	141.912	555.991	594.762
100.926	42.078	88.923	148.369	127.910	115.400	129.718	129.718	156.173	141.912	555.991	594.762
331.217	348.876	337.811	401.364	543.322	461.084	518.382	406.967	598.963	568.906	555.991	594.762
494.023	494.023	557.126	760.913	864.439	777.761	853.378	767.681	968.017	983.720	555.991	594.762

Hafif Ticari Araç Pazarının Analizi (x1000)



Hafif Ticari Araç Pazarı (x1000)
LCV Total Market (x1000)

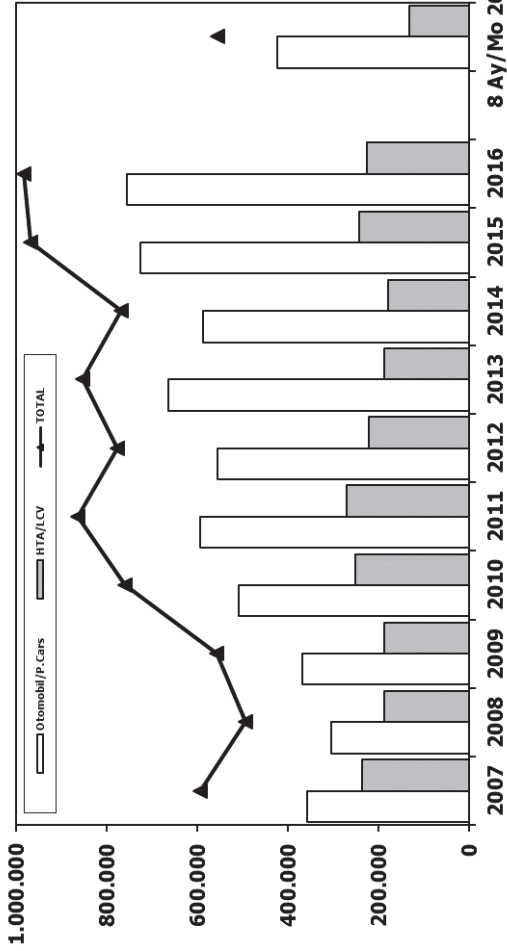


Aylar / Months	10 Yıl Ort. 10 Yrs Avr. (x1000)	2017 (x1000)	%
1	9,8	9,6	-1,5
2	12,2	12,3	1,1
3	17,9	18,2	1,8
4	17,8	18,0	0,9
5	18,8	19,6	4,3
6	18,8	17,5	-6,7
7	16,7	19,9	19,2
8	17,6	17,6	0,5
Total	129,5	132,8	2,5

	1	2	3	4	5	6	7	8	9	10	11	12	8 Ay/Mo	Total
2007	9.931	11.972	17.554	17.162	18.871	18.548	19.244	22.089	18.919	20.156	23.670	39.181	135.371	237.297
2008	12.939	14.055	19.502	17.388	17.121	17.600	16.626	17.568	16.879	13.096	9.052	16.199	132.799	188.025
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	108.941	187.307
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	131.438	251.129
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
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
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
2014	8.302	7.854	9.769	11.742	12.885	13.305	13.305	15.068	17.269	15.759	20.926	36.935	89.461	180.350
2015	10.117	14.514	21.626	20.391	18.664	18.392	19.618	20.824	16.937	16.301	22.204	41.833	145.146	242.421
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
2017	9.634	12.307	18.186	17.990	19.623	17.494	19.913	17.646					132.793	132.793

Hafif Araç Pazarı (AYA < 3.5 Ton)

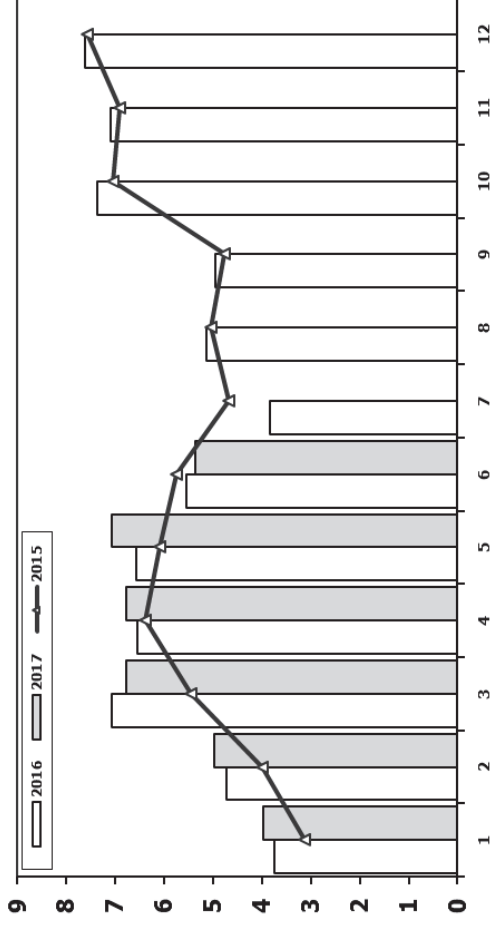
Light Vehicle Market (GVW < 3.5 Ton)



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	8 Ay/Mo 2017
Otomobil/P.Cars	357.465	305.998	369.819	509.784	593.519	556.280	664.655	587.331	725.596	756.938	423.198
HTA/LCV	237.297	188.025	187.307	251.129	270.920	221.481	188.723	180.350	242.421	226.782	132.793
TOTAL	594.762	494.023	557.126	760.913	864.439	777.761	853.378	767.681	968.017	983.720	555.991
HTA/LCV (%)	40	38	34	33	31	28	22	23	25	23	24

Traktör Pazarı (x1000)

F. Tractor Market (x1000)



	1	2	3	4	5	6	7	8	9	10	11	12	6 Ay/Mo	Total
2007	2.816	2.244	3.053	2.657	3.188	3.141	2.497	2.381	3.025	2.755	3.549	3.097	17.099	34.403
2008	2.770	1.855	3.395	3.081	2.769	2.400	2.232	2.485	1.856	1.773	1.305	1.101	16.270	27.022
2009	717	572	688	1.070	1.297	1.256	1.054	1.183	1.117	1.356	1.304	2.144	5.600	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	13.676	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	31.853	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	26.114	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	21.935	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	25.184	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	30.777	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	34.201	70.178
2017	3.974	4.964	6.773	6.780	7.057	5.356							34.904	34.904

Kaynak: TÜİK trafik kayıtları.

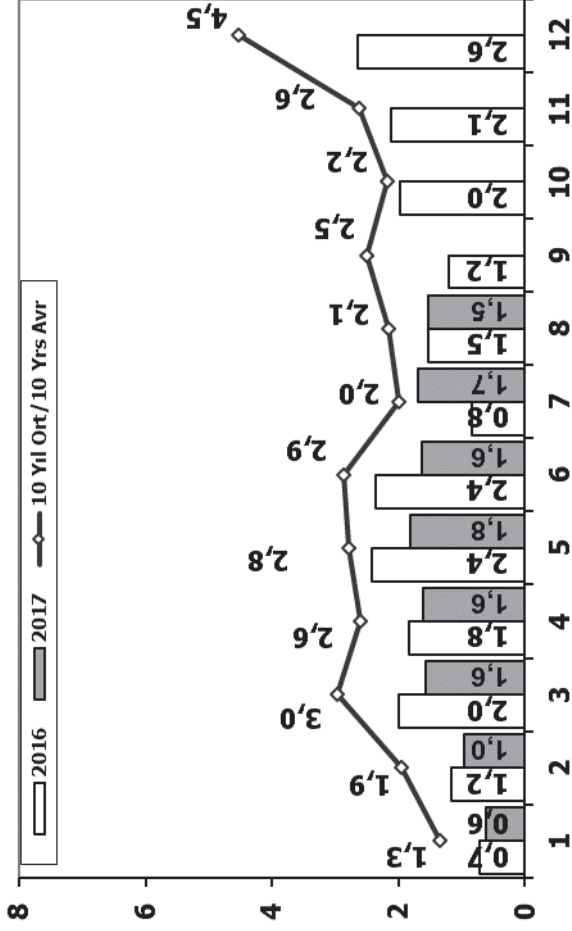
Rakamlar, son iki model yılına ait traktör tescillerinden oluşmaktadır.

Source: Turkish Statistical Institute – Traffic registrations

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

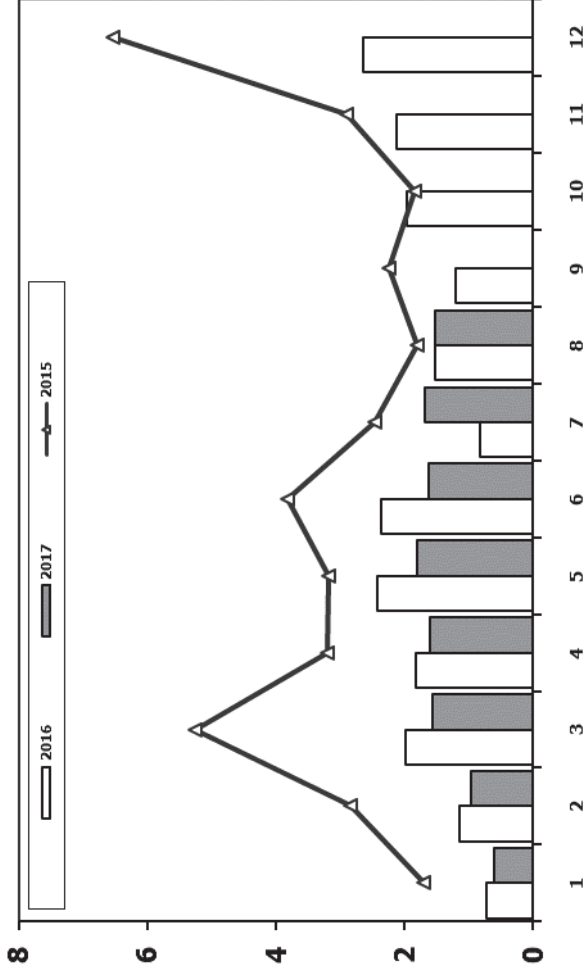
Kamyon Pazarının Analizi (x1000) AYA > 5 Ton

Truck Market Analysis (x1000) GVW > 5 Ton



Kamyon Pazarı (x1000) AYA > 5 Ton

Truck Market (x1000) GVW > 5 Ton



Aylar / Months	10 Yıl Ort. / 10 Yrs Avr. (x1000)	2017 (x1000)	%
1	1,3	0,6	-54,8
2	1,9	1,0	-50,4
3	3,0	1,6	-47,1
4	2,6	1,6	-38,0
5	2,8	1,8	-35,3
6	2,9	1,6	-43,3
7	2,0	1,7	-15,2
8	2,1	1,5	-28,9
Total	18,6	11,4	-38,9

	1	2	3	4	5	6	7	8	9	10	11	12	8 Ay/Mo	Total
2007	1.554	2.055	3.065	2.940	2.865	2.613	2.372	3.145	2.988	2.886	3.258	4.444	20.609	34.185
2008	1.797	2.309	2.621	2.578	2.459	2.526	2.067	2.377	2.390	1.790	1.512	1.834	18.734	26.260
2009	771	759	1.034	1.342	1.355	1.651	1.156	1.205	1.780	866	981	2.015	9.273	14.915
2010	777	968	1.772	1.807	1.966	2.205	2.093	2.446	2.444	3.071	3.136	5.677	14.034	28.362
2011	2.552	3.292	4.418	3.754	3.803	3.749	1.996	2.478	3.081	2.774	3.108	5.787	26.042	40.792
2012	1.375	2.159	3.595	2.697	3.321	3.250	2.450	2.277	2.991	2.244	3.006	5.000	21.124	34.365
2013	1.077	1.931	3.127	2.720	3.145	2.951	2.411	1.845	2.554	1.801	3.173	5.025	19.207	31.760
2014	1.117	1.949	2.818	3.092	3.405	3.438	2.083	2.390	3.281	2.494	3.028	6.313	20.292	35.408
2015	1.705	2.841	5.270	3.208	3.190	3.824	2.463	1.798	2.244	1.848	2.902	6.540	24.299	37.833
2016	718	1.154	1.984	1.835	2.420	2.358	830	1.529	1.204	1.962	2.123	2.640	12.828	20.757
2017	607	964	1.570	1.611	1.807	1.621	1.689	1.529					11.398	11.398