



OTOMOTİV SANAYİİ DERNEĞİ
AUTOMOTIVE MANUFACTURERS ASSOCIATION

AYLIK RAPOR

Automotive Industry Monthly Report

Ocak / January 2015

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

OSD "OICA" Üyesidir



OSD is a Member of "OICA"

2015 Ocak Ayı Özeti / 2015 January Summary

KONULAR/MATTERS		OCAK / JANUARY			SON 12 AYLIK / YoY		
		2014	2015	2015/2014 (%)	2014	2015	2015/2014 (%)
Üretim/Production	Toplam/Total	75.042	102.574	37	1.116.768	1.197.977	7
	Otomobil/P.Cars	52.006	60.414	16	645.539	741.847	15
Pazar/Market	Toplam/Total	34.225	36.567	7	890.209	809.828	-9
	Otomobil/P.Cars	24.368	24.498	1	663.188	587.461	-11
İthalat/Import	Toplam/Total	22.878	21.774	-5	614.821	521.738	-15
	Otomobil/P.Cars	18.208	17.102	-6	535.735	428.876	-20
İhracat/Export	Toplam/Total	51.424	79.288	54	879.895	913.044	4
	Otomobil/P.Cars	35.925	48.533	35	492.468	594.601	21
İhracat / export (\$)	Toplam/Total **	1.626.809.305	1.759.263.326	8	21.680.095.112	22.911.710.185	6
	Otomobil/P.Cars	493.047.071	579.933.723	18	6.925.968.626	7.357.689.357	6

PARAMETRELER / PARAMETERS		OCAK / JANUARY			SON 12 AYLIK / YoY		
		2014	2015	2015/2014 (%)	2014	2015	2015/2014 (%)
ÜFE/PPI		3,32	0,33	**	10,72	3,28	**
TÜFE/CPI		1,98	1,10	**	7,75	7,24	**
Sanayi Endeksi/Industry Index		3,29	0,19	**	11,69	4,40	**
\$ (*)		2,2737	2,4159	6	1,9752	2,2030	12
EURO (*)		3,0782	2,7378	-11	2,6232	2,8630	9
Japon Yeni (*)		2,2258	2,0412	-8	1,9864	2,0404	3

(*) Ortalama Değerler / Average Values

(**) Toplam Sanayi / Total Industry Including Components

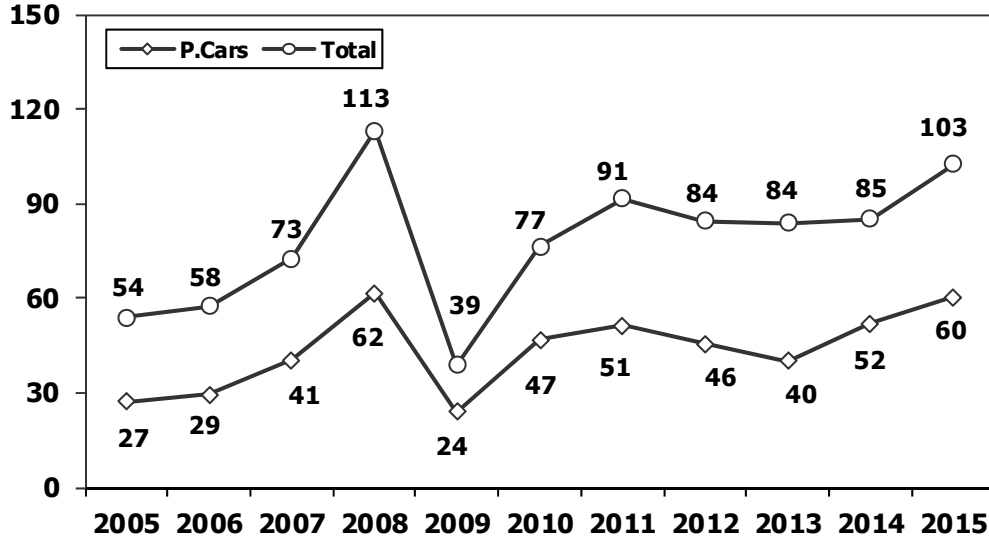
2014/2015 Yılları Üretim 2014/2015 Production

K.KAMYON : AYA 3.5-12 Ton (L.Truck:GVW 3.5-12 Ton)

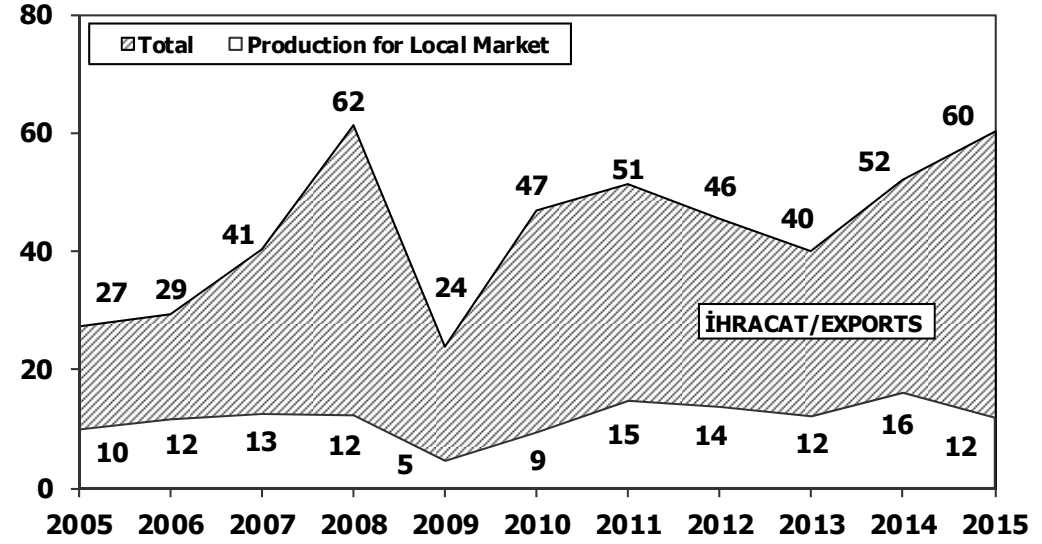
B.KAMYON : AYA 12 Ton'dan Büyük (M.Truck:GVW 12 Ton And Up)

TİPLER	OCAK AYI ÜRETİMİ January Production		Değişim % Change %
	2014	2015	OCAK January
OTOMOBİL - P.Car	52.006	60.414	16
TİCARİ ARAÇLAR - Commercial Vehicles	23.036	42.160	83
* B. KAMYON - M. Truck	1.768	2.503	42
* K. KAMYON - L. Truck	259	272	5
* KAMYONET - Pick Up	18.388	34.292	86
* OTOBÜS - Bus	485	635	31
* MİNİBÜS - Minibus	1.537	3.954	157
* MİDİBÜS - Midibus	599	504	-16
TAŞIT ARAÇLARI TOPLAM - MV Total	75.042	102.574	37
TRAKTÖR - F.Tractor	3.402	3.604	6
GENEL TOPLAM - Grand Total	78.444	106.178	35

Toplam Üretim ve Otomobil Üretimi (x1000)
Total & P.Cars Production (x1000)



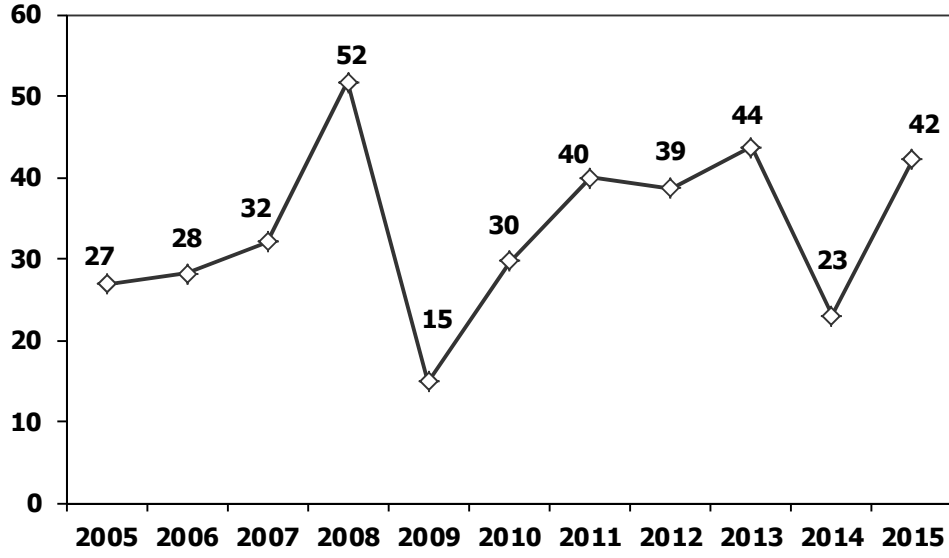
Otomobil Üretimi ve İhracat (x1000)
P.Cars Production & Exports (x1000)



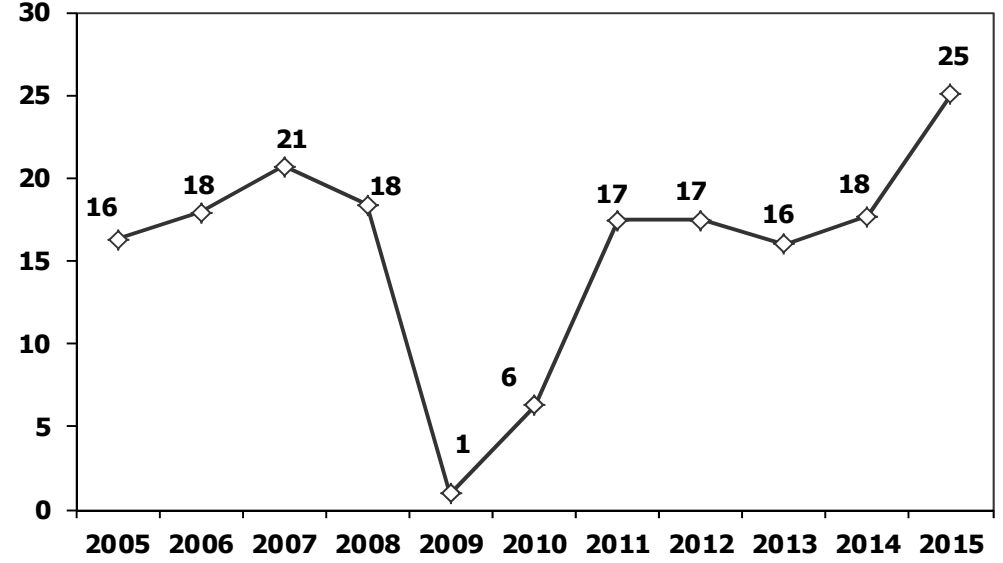
Ocak Ayı Üretimi (January Production)

FİRMALAR Companies	OTOMOBİL Pass.Car	%	K.KAMYON L.Truck	%	B.KAMYON Mid.Truck	%	KAMYONET Pick Up	%	OTOBÜS Bus	%	MİNİBÜS Mini-Bus	%	MİDİBÜS Midi-Bus	%	TRAKTÖR F.Tractor	%	TOPLAM Totals
A.I.O.S.	0	0	271	100	0	0	197	1	7	1	0	0	187	37	0	0	662
FORD OTOSAN	1.088	2	0	0	723	29	21.035	61	0	0	3.896	99	0	0	0	0	26.742
HATTAT TARIM	0	0	0	0	0	0	0	0	0	0	0	0	0	0	141	4	141
HONDA TÜRKİYE	957	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	957
HYUNDAI ASSAN	15.200	25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	15.200
KARSAN	0	0	0	0	0	0	0	0	2	0	58	1	26	5	0	0	86
M. BENZ TÜRK	0	0	0	0	1.780	71	0	0	348	55	0	0	0	0	0	0	2.128
MANTÜRKİYE	0	0	0	0	0	0	0	0	137	22	0	0	0	0	0	0	137
OTOKAR	0	0	1	0	0	0	0	0	11	2	0	0	166	33	0	0	178
OYAK RENAULT	28.512	47	0	0	0	0	0	0	0	0	0	0	0	0	0	0	28.512
TEMSA GLOBAL	0	0	0	0	0	0	0	0	130	20	0	0	125	25	0	0	255
TOFAŞ	5.181	9	0	0	0	0	13.060	38	0	0	0	0	0	0	0	0	18.241
TOYOTA	9.476	16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9.476
TÜRK TRAKTÖR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3.463	96	3.463
TOPLAM	60.414	100	272	100	2.503	100	34.292	100	635	100	3.954	100	504	100	3.604	100	106.178

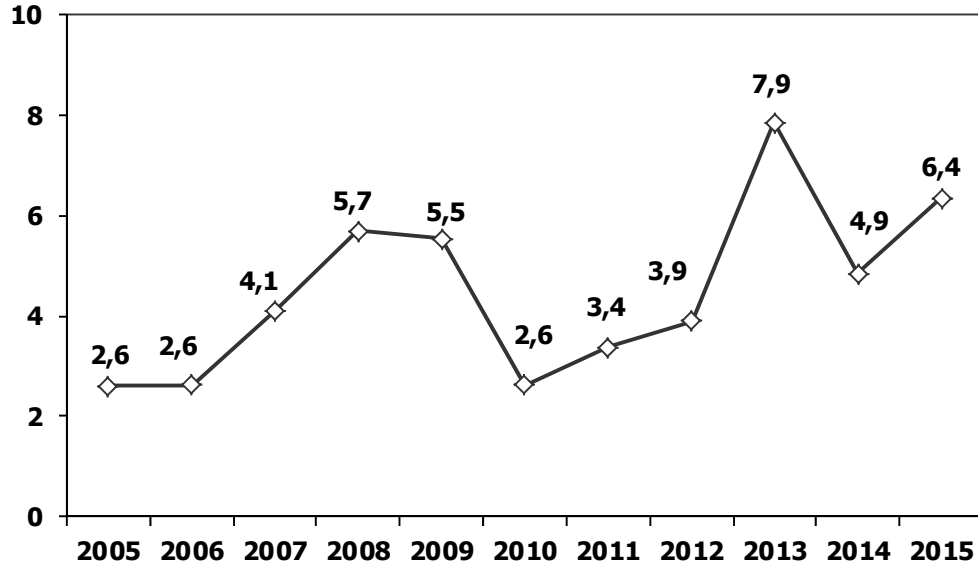
Ticari Araç Üretimi (x1000) (Ocak)
Commercial Vehicle Production (x1000) (January)



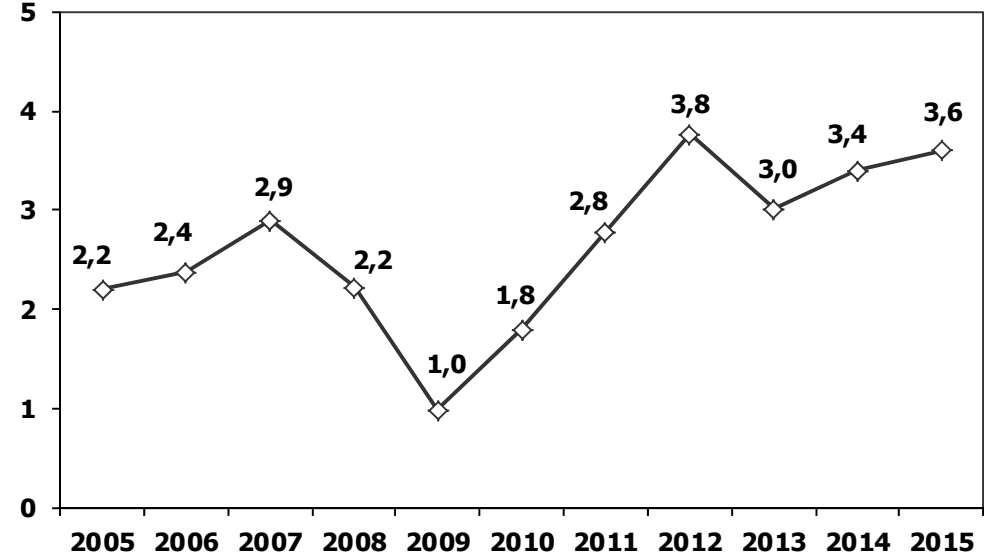
(AYA >12 Ton) **Büyük Kamyon Üretimi** (x100) (Ocak)
(GVW >12 Ton) Heavy Truck Production (x100) (January)



Otobüs Üretimi (x100) (Ocak)
Bus Production (x100) (January)

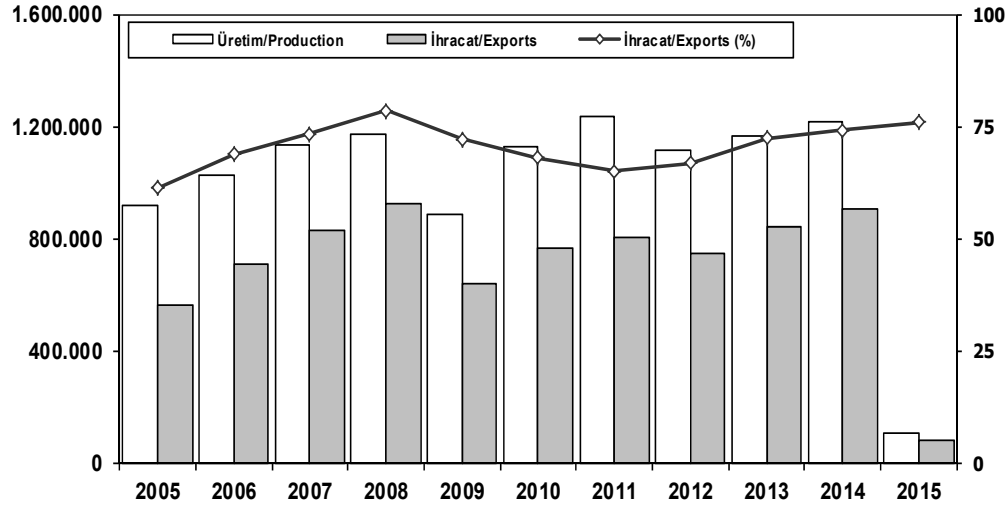


Traktör Üretimi (x1000) (Ocak)
F. Tractor Production (x1000) (January)



İhracat/Üretim (2015 Ocak)

Exports/Production (2015 January)



Taşıt Araçları İhracatı

Motor Vehicle Exports

SEKTÖR/SECTOR	2013	2014	2015		2014/2015 (%)
			1 Ay-1 Mo		
OTOMOBİL/ P.Cars	484.504	581.993	35.925	48.533	35
TİCARİ ARAÇLAR / CV	343.967	303.187	15.499	30.755	98
* Kamyonet/Pick-Up	300.765	269.995	14.122	26.679	89
* Minibüs/Minibus	34.664	26.458	1.088	3.642	235
* Kamyon/Truck	3.055	1.281	61	88	44
* Midibüs/Midibus	985	824	54	31	-43
* Otobüs/Bus	4.498	4.629	174	315	81
TAŞIT ARAÇLARI / MV TOTAL	828.471	885.180	51.424	79.288	54
TRAKTÖR/F.TRACTOR	14.996	17.014	864	1.342	55
TOTAL	843.467	902.194	52.288	80.630	54

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Üretim/Production	916.062	1.026.427	1.132.951	1.171.917	884.466	1.124.982	1.234.637	1.115.233	1.166.043	1.218.848	106.178
İhracat/Exports	561.078	706.402	829.879	920.763	637.855	763.670	801.112	745.354	843.467	902.194	80.630
İhracat/Exports (%)	61	69	73	79	72	68	65	67	72	74	76

Otomotiv Ana ve Yan Sanayii İhracatı (ABD \$)

CBU and CKD Exports - \$

Ürün Grubu	2010	2011	2012	2013	2014	2014 Ocak	2015 Ocak	Değişim %
TOPLAM YAN SANAYİ	6.595.662.583	8.307.826.870	8.215.954.295	9.065.017.539	9.508.032.776	817.403.420	703.986.898	-14
İÇ DİŞ LASTİK	988.990.821	1.373.205.546	1.199.572.093,47	1.130.005.892	1.126.947.745,11	101.486.625	75.071.498	-26
EMNİYET CAMI	107.203.983	120.041.467	120.641.763,30	135.230.310	143.231.168,40	13.559.779	11.020.550	-19
MOTOR	305.490.804	273.896.369	272.085.582,31	319.294.885	171.893.752,32	14.091.713	10.757.427	-24
AKÜ	186.504.496	232.611.079	250.104.807,27	306.451.449	289.150.764,10	24.191.999	20.837.960	-14
DİĞER AKSAM ve PARÇALAR	5.007.472.478	6.308.072.409	6.373.550.048,17	7.174.035.002	7.776.809.345,72	664.073.304	586.299.462	-12
TOPLAM ANA SANAYİ	10.855.476.447	12.128.522.618	11.100.457.162	12.491.591.365	13.272.198.027	809.405.885	1.055.276.429	30
OTOBÜS	744.935.284	929.372.870	855.424.303,62	937.790.963	985.983.007,01	40.779.688	56.594.788	39
MİDİBÜS - MİNİBÜS	120.378.674	145.199.034	161.806.275,12	147.769.644	97.685.509,12	4.873.949	12.375.103	154
OTOMOBİL	6.217.404.551	6.541.969.418	6.068.045.119,19	6.855.475.590	7.270.836.596,21	493.047.071	579.933.723	18
KAMYON - KAMYONET	3.363.101.038	4.034.772.621	3.433.310.998,81	3.918.798.755	4.201.921.030,07	224.441.355	356.603.851	59
ÇEKİCİ	145.710.283	116.912.332	71.336.634,88	218.385.732	252.416.256,09	18.105.294	25.208.506	39
RÖMÖRK ve YARI RÖMÖRK	72.145.150	147.247.613	195.093.536,78	77.907.407	38.396.524,81	1.429.079	5.111.385	258
TARIM TRAKTÖRÜ	191.801.467	213.048.730	315.440.293,75	335.463.275	424.959.103,39	26.729.450	19.449.073	-27
TOPLAM	17.451.139.030	20.436.349.488	19.316.411.457	21.556.608.904	22.780.230.802	1.626.809.305	1.759.263.326	8

Kaynak: T.C Ekonomi Bakanlığı UİB Otomotiv Endüstrisi İhracatçıları Birliği



Firma Bazında İhracat (Adet)
Export Of member Companies (Unit)

FİRMALAR	2013	2014	1 Ay	
			2014	2015
OYAK RENAULT	266.508	257.992	12.579	21.671
FORD OTOSAN	208.722	187.921	6.155	20.491
TOFAŞ	160.309	142.234	10.966	13.832
HYUNDAI ASSAN	85.500	179.793	12.425	13.650
TOYOTA	86.908	109.517	8.889	9.212
TÜRK TRAKTÖR	14.402	15.866	822	1.309
M. BENZ TÜRK	5.331	3.438	114	285
MAN TÜRKİYE	898	937	66	107
HATTAT TARIM	594	1.148	42	33
KARSAN	10.120	37	6	20
OTOKAR	620	580	3	11
A.I.O.S.	770	748	52	9
HONDA TÜRKİYE	2.121	1.560	147	0
TEMSA GLOBAL	663	423	21	0
GENEL TOPLAM	843.467	902.194	52.287	80.630

Kaynak: OSD

Sektör Bazında İhracat (\$)
Exports on Sectorial Basis

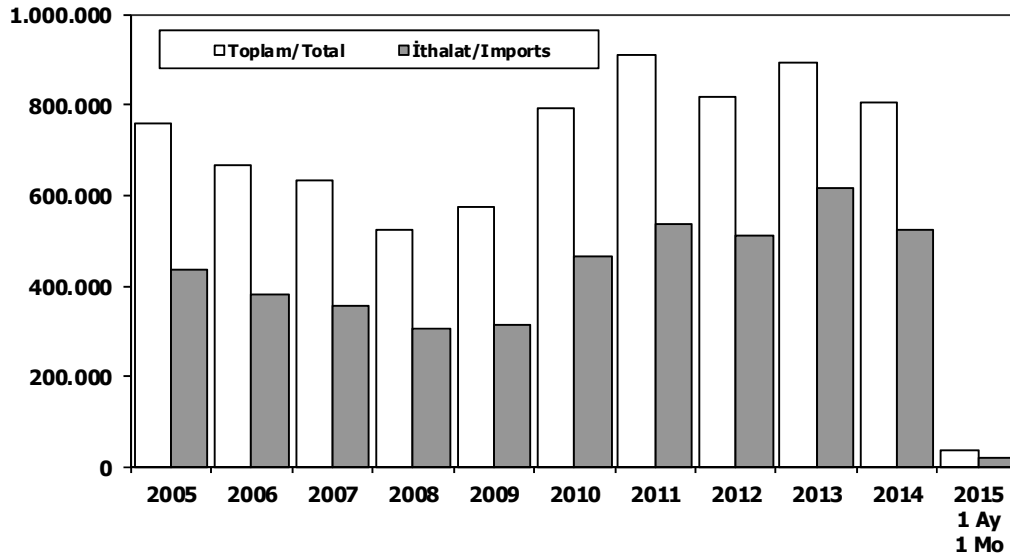
SEKTÖRLER	OCAK				SON 12 AYLIK			
	2014	2015	15/'14 (%)	2015 Pay (%)	2013-2014	2014-2015	15/'14 (%)	Pay 15 (%)
1 Otomotiv Endüstrisi	1.585.958	1.730.321	9,1	16,0	21.403.670	22.414.934	4,7	14,4
2 Hazır giyim ve Konfeksiyon	1.586.677	1.391.624	-12,3	12,9	17.554.011	18.541.634	5,6	11,9
3 Kimyevi Maddeler ve Mamulleri	1.394.170	1.196.632	-14,2	11,1	17.509.353	17.587.623	0,4	11,3
4 Çelik	1.105.473	865.230	-21,7	8,0	13.779.550	12.964.297	-5,9	8,3
5 Elektrik - Elektronik ve Hizmet	902.953	735.135	-18,6	6,8	11.766.808	11.946.283	1,5	7,7
6 Tekstil ve Hammaddeleri	767.902	650.150	-15,3	6,0	8.473.466	8.769.056	3,5	5,6
7 Demir ve Demir Dışı Metaller	591.731	490.520	-17,1	4,5	6.901.946	7.003.370	1,5	4,5
8 Hububat, Bakliyat, Yağlı Tohumlar ve Mam.	614.050	568.196	-7,5	5,3	6.698.330	6.671.970	-0,4	4,3
9 İhracatçı Birlikleri Kaydından Muaf İhracat	**	**	**	**	5.894.237	6.073.222	3,0	3,9
10 Makine ve Aksamları	477.207	466.805	-2,2	4,3	5.844.376	6.035.637	3,3	3,9
11 Madencilik Ürünleri	400.471	277.694	-30,7	2,6	5.040.778	4.522.982	-10,3	2,9
12 Ağaç Mamulleri ve Orman Ürünleri	361.375	318.966	-11,7	3,0	4.509.465	4.476.305	-0,7	2,9
13 İklimlendirme Sanayii	329.795	275.839	-16,4	2,6	4.250.392	4.370.285	2,8	2,8
14 Mücevher	194.227	288.800	48,7	2,7	2.292.698	3.201.266	39,6	2,1
15 Çimento, Cam, Seramik ve Toprak Ürünleri	243.550	201.606	-17,2	1,9	3.163.661	3.114.586	-1,6	2,0
16 Fındık ve Mamulleri	153.796	248.367	61,5	2,3	1.745.363	2.413.265	38,3	1,5
17 Yaş Meyve Sebze	219.373	219.327	0,0	2,0	2.347.206	2.395.363	2,1	1,5
18 Halı	178.357	144.134	-19,2	1,3	2.207.764	2.320.523	5,1	1,5
19 Su Ürünleri ve Hayvansal Mamuller	209.571	172.946	-17,5	1,6	2.026.529	2.239.888	10,5	1,4
20 Deri ve Deri Mamulleri	123.769	113.145	-8,6	1,0	1.951.048	1.841.451	-5,6	1,2
21 Savunma ve Havaçılık Sanayii	106.122	99.512	-6,2	0,9	1.422.367	1.641.253	15,4	1,1
22 Kuru Meyve ve Mamulleri	116.018	98.158	-15,4	0,9	1.447.415	1.442.712	-0,3	0,9
23 Meyve Sebze Mamulleri	111.499	93.323	-16,3	0,9	1.346.574	1.398.484	3,9	0,9
24 Gemi ve Yat	54.471	43.976	-19,3	0,4	1.169.110	1.270.382	8,7	0,8
25 Tütün	109.576	84.587	-22,8	0,8	949.033	1.050.669	10,7	0,7
26 Zeytin ve Zeytinyağı	24.434	16.866	-31,0	0,2	419.160	220.470	-47,4	0,1
27 Diğer Sanayi Ürünleri	6.961	5.779	-17,0	0,1	104.559	108.889	4,1	0,1
28 Süs Bitkileri ve Mamulleri	7.359	6.330	-14,0	0,1	79.092	82.018	3,7	0,1
T O P L A M (Total)	11.976.843	10.803.970	-9,8	100,0	152.297.959	156.118.816	2,5	100,0

Kaynak: TİM

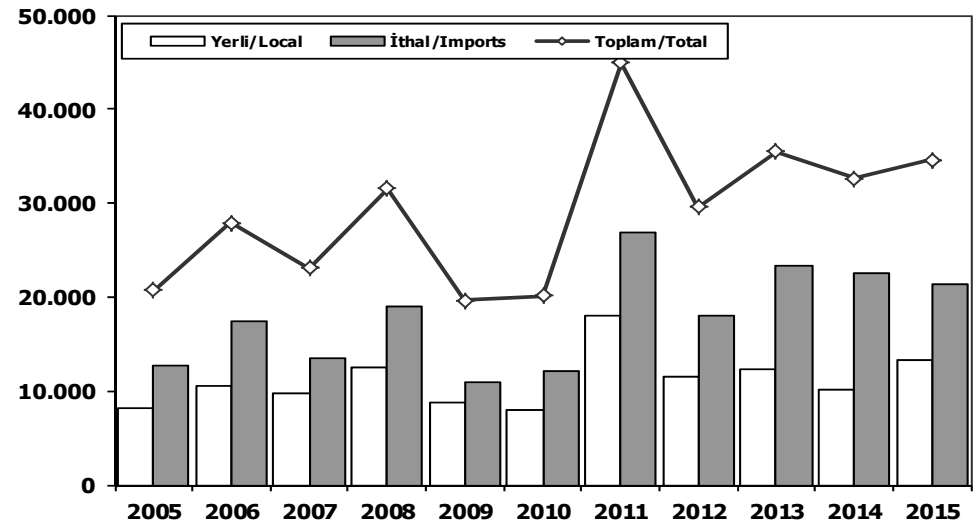
First 5 Sectors:

- 1- Transport Vehicle and Component Industry
- 2- Ready Wear and Confection
- 3- Chemical Articles and Products
- 4-Steel
- 5-Electric-Electronic and Machine

Toplam Pazar (Otomobil+T.Araç) Total Market (P.Cars+C.V)



Hafif Araçlar Pazarı (2004-2015 Ocak) LV Market (2004-2015 January)

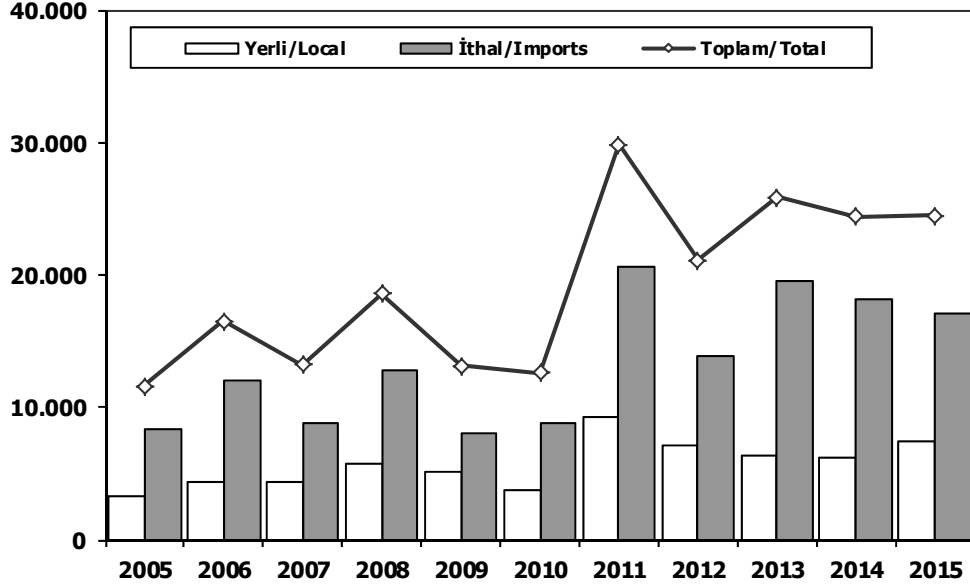


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2014 1 Ay 1 Mo	2015 1 Ay 1 Mo
Toplam/Total	758.537	665.515	634.206	526.544	575.869	793.172	910.867	817.620	893.124	807.486	34.225	36.567
İthalat/Imports	436.033	382.460	355.752	306.087	313.921	465.408	538.532	511.694	615.609	522.842	22.878	21.774
İthalat/Imports (%)	57	57	56	58	55	59	59	63	69	65	67	60

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	8.072	10.496	9.710	12.593	8.719	8.005	18.023	11.570	12.216	10.106	13.197
İthal/Imports	12.675	17.421	13.407	18.934	10.887	12.090	26.869	17.975	23.307	22.564	21.418
Toplam/Total	20.747	27.917	23.117	31.527	19.606	20.095	44.892	29.545	35.523	32.670	34.615
İthalat/Imports (%)	61	62	58	60	56	60	60	61	66	69	62

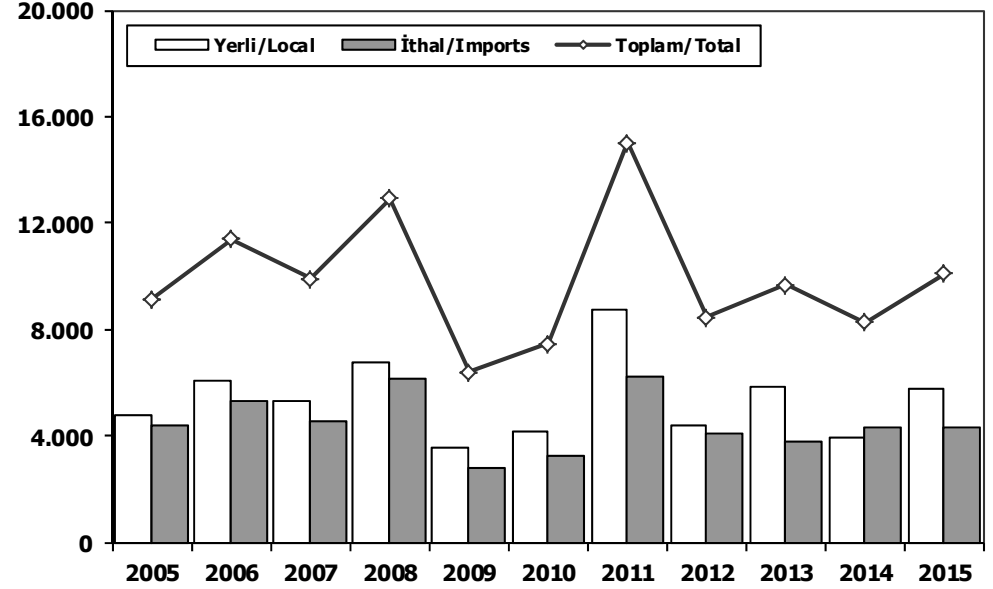
Otomobil Pazarı (2004-2015 Ocak)

P.Cars Market (2004-2015 January)



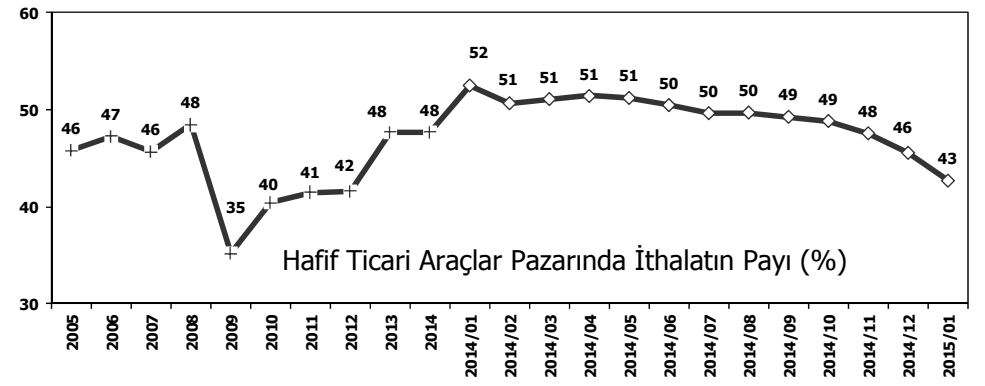
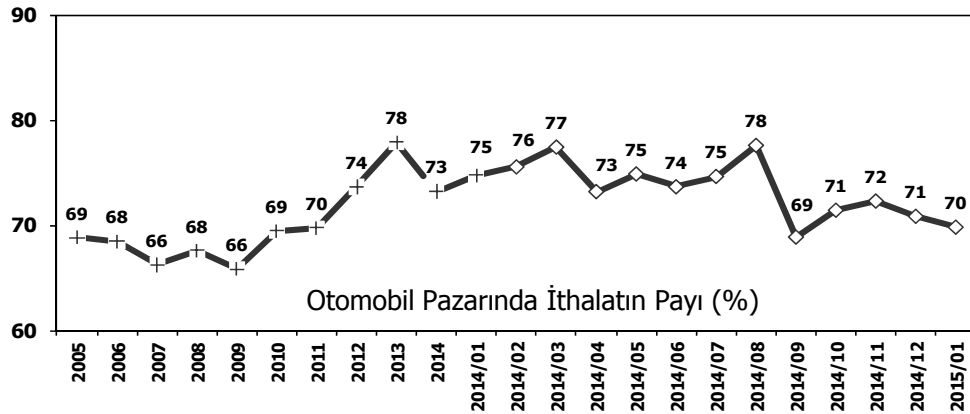
Hafif Ticari Araçlar Pazarı (2004-2015 Ocak)

Light Commercial Vehicle Market (2004-2015 January)



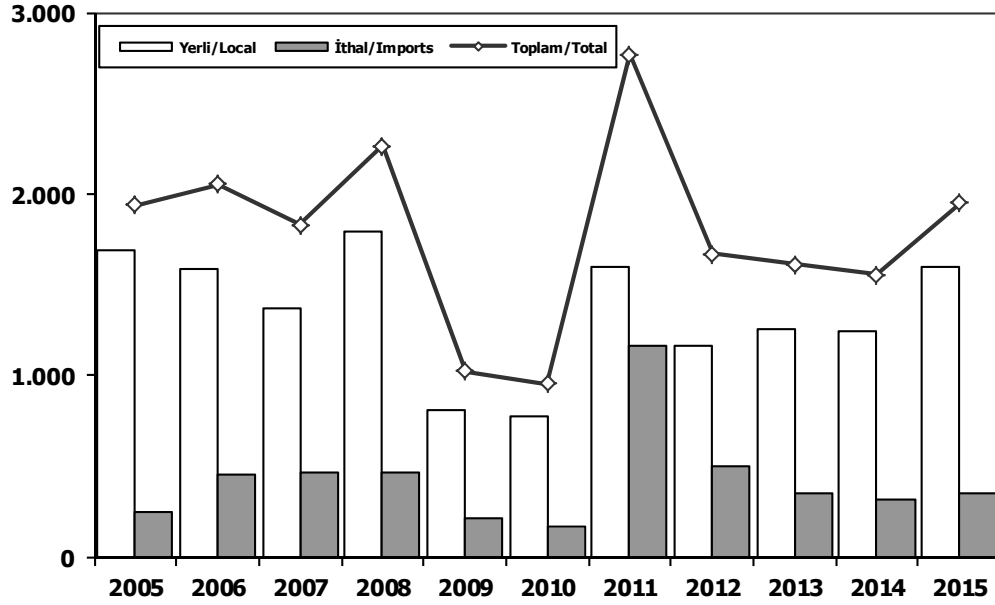
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	3.300	4.434	4.381	5.792	5.129	3.789	9.237	7.190	6.326	6.160	7.396
İthal/Imports	8.295	12.072	8.805	12.796	8.044	8.805	20.631	13.887	19.509	18.208	17.102
Toplam/Total	11.595	16.506	13.186	18.588	13.173	12.594	29.868	21.077	25.835	24.368	24.498
İthalat/Imports (%)	72	73	67	69	61	70	69	66	76	75	70

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	4.772	6.062	5.329	6.801	3.590	4.216	8.786	4.380	5.890	3.946	5.801
İthal/Imports	4.380	5.349	4.602	6.138	2.843	3.285	6.238	4.088	3.798	4.356	4.316
Toplam/Total	9.152	11.411	9.931	12.939	6.433	7.501	15.024	8.468	9.688	8.302	10.117
İthalat/Imports (%)	48	47	46	47	44	44	42	48	39	52	43



Ağır Ticari Araçlar Pazarı (2004-2015 Ocak)

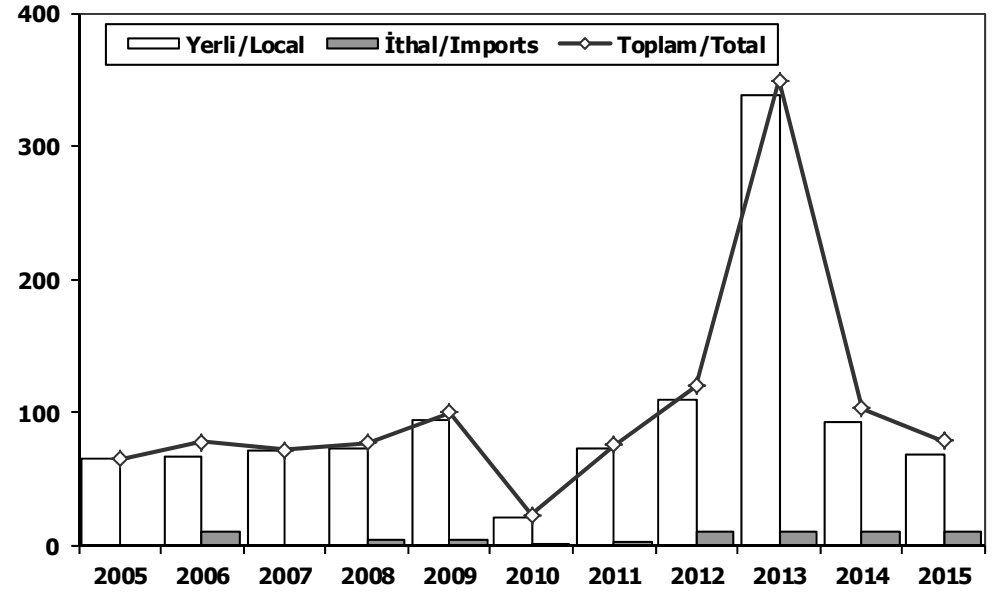
HCV Market (2004-2015 January)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	1.686	1.593	1.368	1.794	812	781	1.602	1.168	1.258	1.241	1.596
İthal/Imports	254	459	465	471	213	174	1.164	506	359	314	356
Toplam/Total	1.940	2.052	1.833	2.265	1.025	955	2.766	1.674	1.617	1.555	1.952
İthalat/Imports (%)	13	22	25	21	21	18	42	30	22	20	18

Otobüs Pazarı (2004-2015 Ocak)

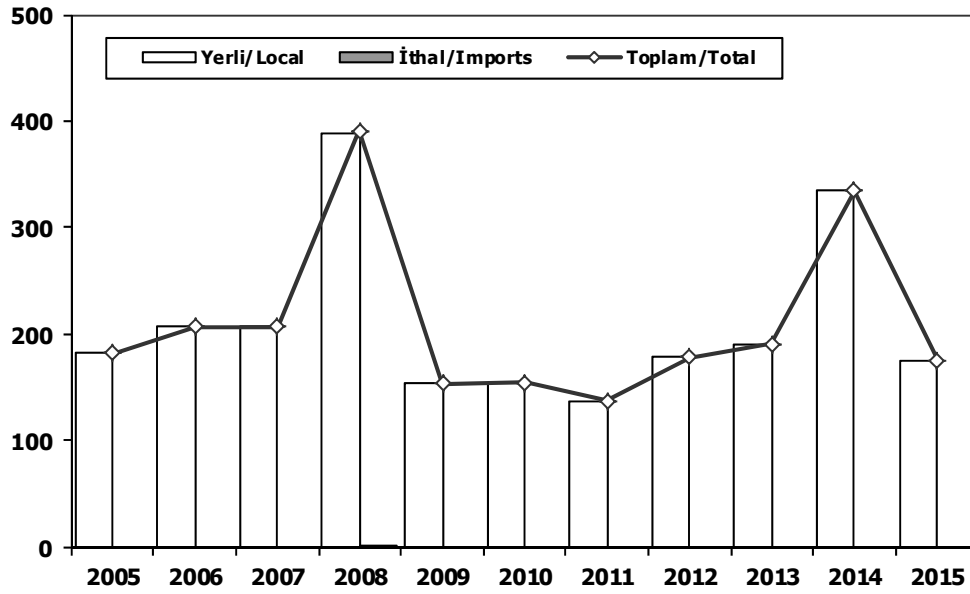
Bus Market (2004-2015 January)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	65	67	72	73	95	22	73	109	339	93	69
İthal/Imports	0	11	0	4	5	1	3	11	10	10	10
Toplam/Total	65	78	72	77	100	23	76	120	349	103	79
İthalat/Imports (%)	0	14	0	5	5	4	4	9	3	10	13

Midibüs Pazarı (2004-2015 Ocak) (7-9 mt/25-35 Kişilik)

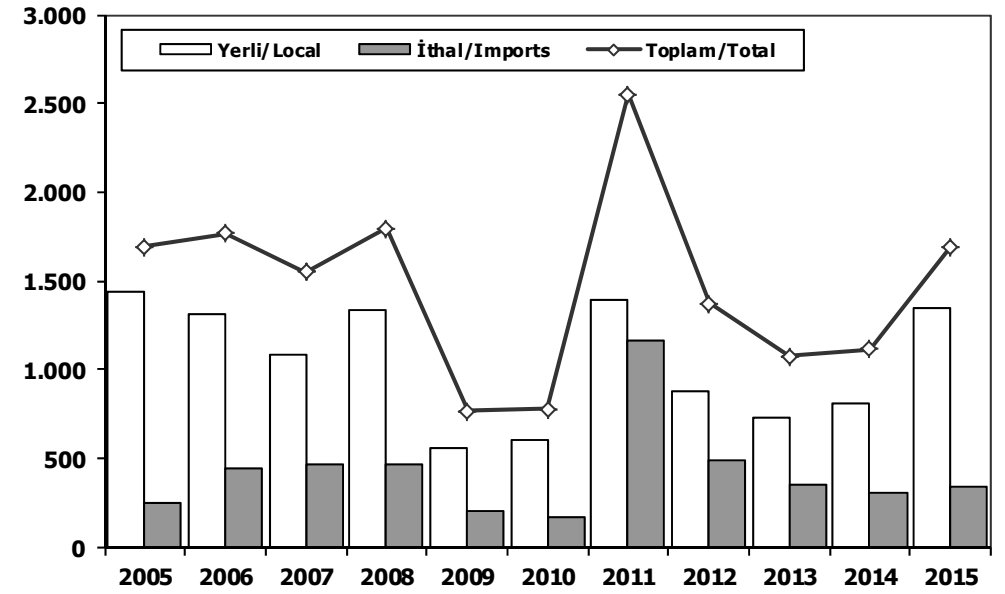
Midibus (2004-2015 January) Market (7-9 mt/25-35 Passengers)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	182	207	207	389	154	155	138	179	191	335	176
İthal/Imports	0	0	0	2	0	0	0	0	0	0	0
Toplam/Total	182	207	207	391	154	155	138	179	191	335	176
İthalat/Imports (%)	0	0	0	1	0	0	0	0	0	0	0

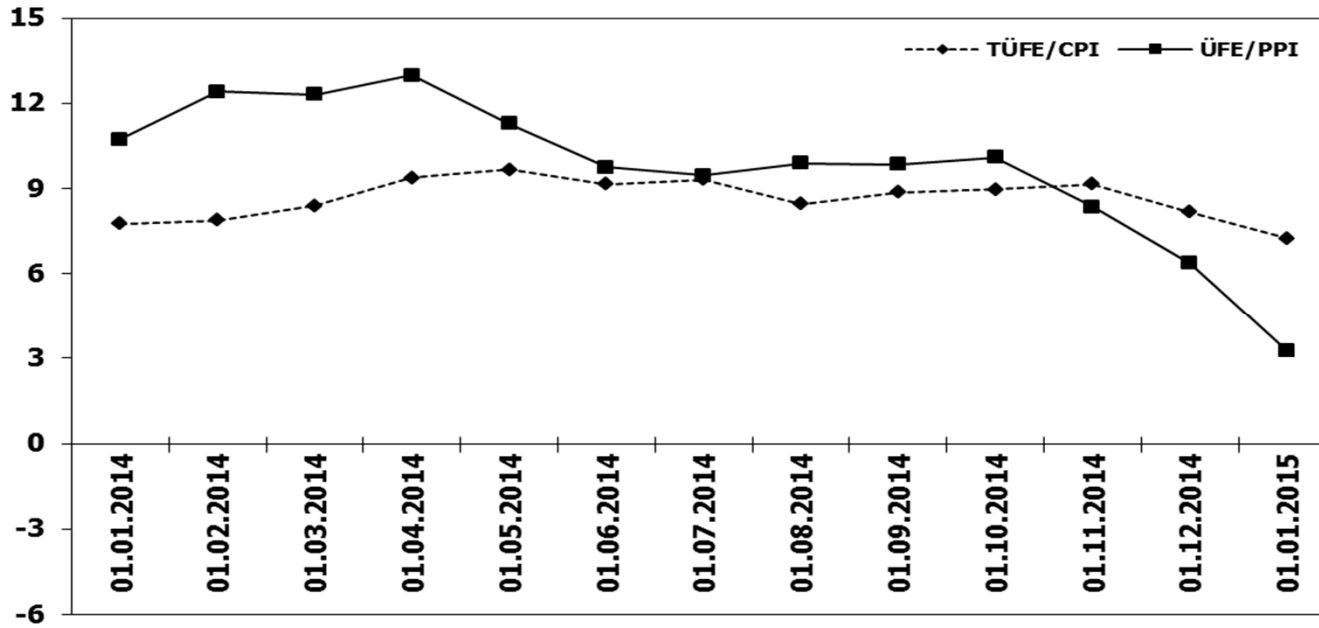
Kamyon Pazarı (2004-2015 Ocak)

Truck Market (2004-2015 January)

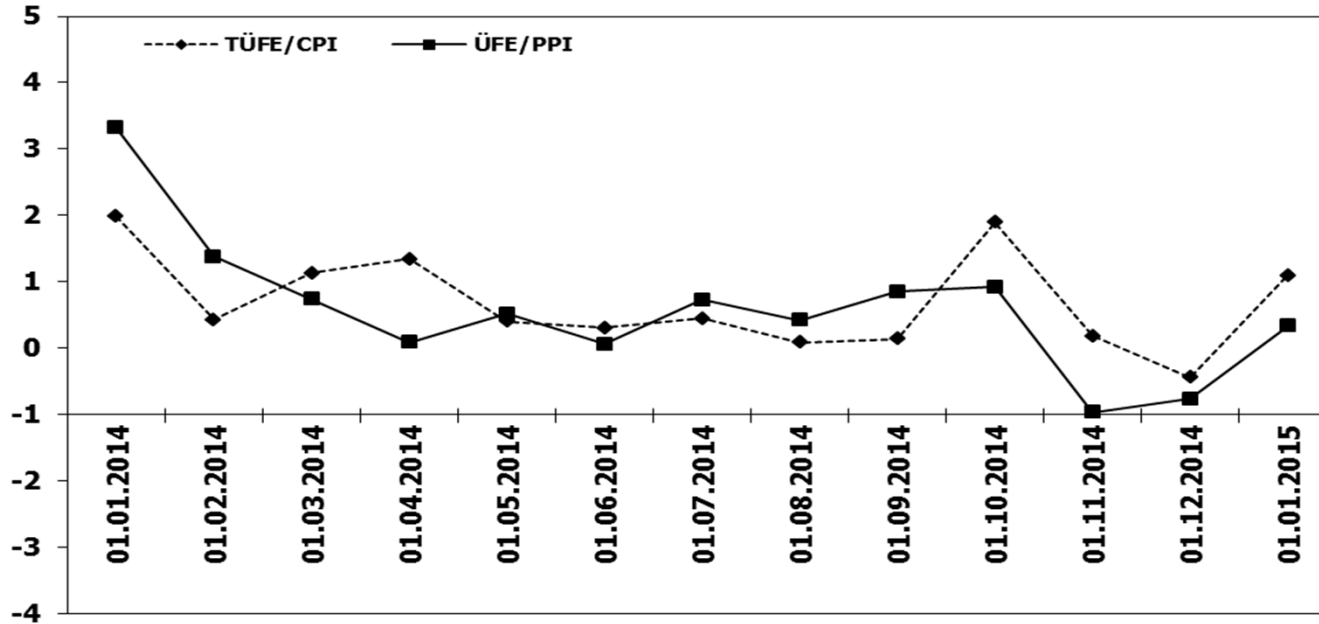


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yerli/Local	1.439	1.319	1.089	1.332	563	604	1.391	880	728	813	1.351
İthal/Imports	254	448	465	465	208	173	1.161	495	349	304	346
Toplam/Total	1.693	1.767	1.554	1.797	771	777	2.552	1.375	1.077	1.117	1.697
İthalat/Imports (%)	15	25	30	26	27	22	45	36	32	27	20

TÜFE ve ÜFE'nin Yıllık Değişimi (%) CPI and PPI Yearly Changes (%)



TÜFE ve ÜFE'nin Aylık Değişimi (%) CPI and PPI Monthly Changes (%)



2015 Yılı İthal Hafif Araç Satışları 2015 Light Vehicles Import Sales

2015 YILI İTHAL OTOMOBİL SATIŞLARI / P.Cars Import 2015

	2014 TOPLAMI 2014 Total	1	2	3	4	5	6	7	8	9	10	11	12	2015 TOPLAMI 2015 Total
VOLKSWAGEN	84.646	4.491												4.491
OPEL	39.255	952												952
FORD	35.682	1.101												1.101
DACIA	27.897	1.709												1.709
B.M.W	26.174	1.219												1.219
RENAULT	25.572	653												653
MERCEDES	23.100	417												417
HYUNDAI	21.685	784												784
NISSAN	19.422	949												949
AUDI	17.809	610												610
PEUGEOT	17.026	846												846
SKODA	14.537	515												515
CITROEN	14.389	683												683
SEAT	12.697	164												164
KIA	11.017	330												330
TOYOTA	10.146	327												327
FIAT	6.179	248												248
VOLVO	6.060	295												295
HONDA	3.269	98												98
JEEP	1.960	239												239
SUBARU	1.402	65												65
MAZDA	1.291	27												27
LAND ROVER	1.207	31												31
MINI (İngiliz)	1.071	21												21
MITSUBISHI	1.159	64												64
ALFA ROMEO	967	34												34
SUZUKI	958	27												27
PROTON	707	55												55
PORSCHE	588	45												45
CHEVROLET	572	0												0
SSANGYONG	531	44												44
CHERY	325	26												26
LANCIA	210	0												0
TATA	126	21												21
GEELY	95	4												4
MASERATI	83	2												2
SMART	76	4												4
JAGUAR	52	0												0
BENTLEY	21	0												0
FERRARI	11	0												0
INFİNİTİ	6	1												1
LAMBORGHİNİ	2	1												1
TOPLAM	429.982	17.102	0	0	0	0	0	0	0	0	0	0	0	17.102

2015 YILI İTHAL HAFİF TİCARİ ARAÇ SATIŞLARI / Light Commercial Vehicles Import 2015

	2014 TOPLAMI 2014 Total	1	2	3	4	5	6	7	8	9	10	11	12	2015 TOPLAMI 2015 Total
VOLKSWAGEN	24.001	1.336												1.336
RENAULT	8.716	501												501
MERCEDES	8.028	391												391
FIAT	7.664	347												347
DACIA	6.572	250												250
CITROEN	6.048	269												269
PEUGEOT	5.832	303												303
MITSUBISHI	4.188	390												390
IVECO	2.524	117												117
KIA	2.057	147												147
ISUZU	1.728	27												27
TOYOTA	1.670	73												73
HYUNDAI	1.565	89												89
SSANGYONG	626	31												31
FORD	333	22												22
TATA	290	22												22
NISSAN	275	1												1
MAZDA	9	0												0
TOPLAM	82.126	4.316	0	0	0	0	0	0	0	0	0	0	0	4.316