



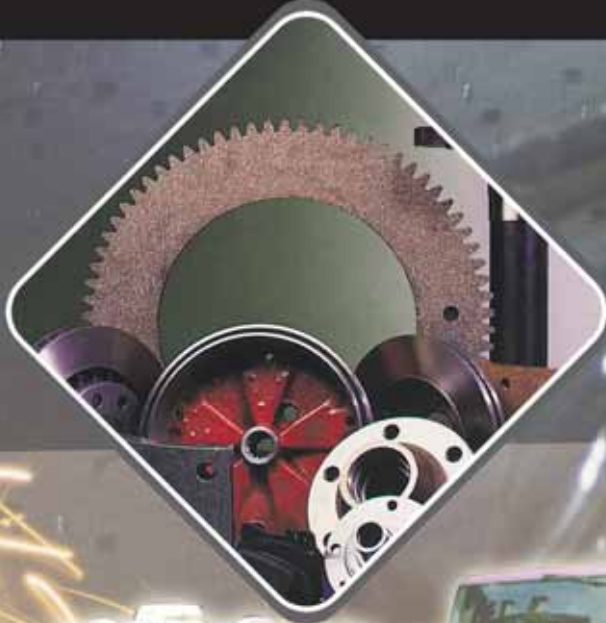
REPUBLIC OF TURKEY  
MINISTRY OF ECONOMY



INDUSTRY



# AUTOMOTIVE AND SPARE PARTS



TURKEY

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# AUTOMOTIVE AND SPARE PARTS

## TURKEY'S VEHICLE INDUSTRY

### Production

Vehicle industry production in Turkey dates back to the mid-1950s and the industry gained momentum in the early 1960s. After manufacturing some prototype vehicles during the 1950s, the first vehicle assembly company was established in 1954 (Turk Willys Overland Ltd.) for jeep manufacturing. By 1955, trucks, and by 1963, buses were being assembled in Turkey. Then passenger car assembly companies, namely TOFAŞ (FIAT), OYAK (RENAULT) and OTOSAN (FORD) began operations in the next three years. In 1966, the industry also began to assemble its own cars (OTOSAN). The Turkish-made passenger car of those times, "ANADOL", is nostalgia now. The two major producers of cars, TOFAŞ and OYAK-RENAULT, under Italian and French licenses respectively, established their production lines in 1971. Recently, Japanese and South Korean car manufacturers have established joint-ventures in Turkey. In 1999, Turkish truck manufacturer BMC began to export its own design trucks to the United Kingdom, Spain and Portugal. As to passenger cars and light commercial vehicles, Turkish manufacturers are becoming world production centers of global companies, with whom they have license agreements.

At present, Turkey is the biggest light commercial vehicle and bus manufacturer in the European Union.

Today, 13 companies are manufacturing various types of vehicles such as passenger cars, buses, trucks, pick-ups, mini and midi-buses and trailers. Five companies are producing passenger cars (FIAT, HONDA, HYUNDAI, RENAULT, TOYOTA), ten companies are producing pick-ups and trucks (ANADOLU ISUZU, BMC, FORD OTOSAN, HYUNDAI, KARSAN, M.A.N., MERCEDES-BENZ, OTOKAR, TEMSA, TOFAŞ) and nine companies are producing buses and mini buses (BMC, FORD, HYUNDAI, ANADOLU ISUZU, KARSAN, M.A.N, MERCEDES-BENZ, OTOKAR, TEMSA).

### *Companies in Automotive Industry*

Company	Location	Products
Anadolu Isuzu O.S.	Kocaeli	Trucks, pick-ups, midibuses
BMC	Izmir	Trucks, pick-ups, buses, mini-buses, midi-buses
Ford Otosan	Eskisehir/Kocaeli	Trucks, pick-ups, minibuses
Honda Türkiye	Gebze/Kocaeli	Passenger cars
Hyundai Assan	Kocaeli	Passenger cars, pick-ups, minibuses
Karsan	Bursa	Trucks, pick-ups, minibuses, midi-buses
M.A.N.Türkiye	Ankara	Trucks, buses
M.Benz Türk	Istanbul/Aksaray	Trucks, buses
Otokar	Sakarya	Pick-ups, minibuses, midi-buses
Oyak Renault	Bursa	Passenger cars
Temsa	Adana	Trucks, pick-ups, buses, midi-buses
Tofas-Fiat	Bursa	Passenger cars, pick-ups
Toyota	Sakarya	Passenger cars

Source: Automotive Manufacturers Association (OSD)

The Turkish vehicle industry has a total capacity of 1,5 million vehicles, of which 1.4 million (86%) is for light vehicles (passenger cars, minibuses and pick-ups). The total vehicle production in 2011 was 1.189.131 units (excluding tractors) which is a record for the Turkish automotive industry.

#### **Vehicle Production by Type 2006-2011 (Units)**

	2006	2007	2008	2009	2010	2011
Passenger Cars	545.682	634.883	621.567	510.931	603.394	639.734
Trucks	37.026	34.544	36.800	8.246	23.671	37.396
Pickups	369.862	391.737	449.434	330.044	442.408	479.110
Buses	6.019	6.946	7.581	5.931	5.268	6.907
Mini-buses	20.728	21.999	21.123	11.829	16.978	22.475
Midi-buses	8.263	9.305	10.605	2.624	2.658	3.509
<b>Total</b>	<b>987.580</b>	<b>1.099.414</b>	<b>1.171.917</b>	<b>869.605</b>	<b>1.094.557</b>	<b>1.189.131</b>

Source: Automotive Manufacturers Association (OSD)

There are 9 commercial vehicle manufacturers in Turkey. Five companies operate in the agricultural tractor sector. The three major companies (TÜRK TRAKTOR, TUMOSAN and HATTAT TARIM) are the leading producers and exporters in the agricultural tractor sector.

#### **Tractors Production (Units)**

	2006	2007	2008	2009	2010	2011
<b>Tractors</b>	<b>38.847</b>	<b>33.518</b>	<b>24.807</b>	<b>14.861</b>	<b>30.425</b>	<b>45.506</b>

Source: Automotive Manufacturers Association (OSD)

#### **Vehicle Production by Manufacturer 2006-2011 (Units)**

	2006	2007	2008	2009	2010	2011
Anadolu Isuzu	7.445	7.842	10.007	1.817	3.292	4.324
BMC	11.679	10.369	8.736	3.167	3.342	3.724
Ford Otosan	258.126	286.356	268.761	173.456	242.070	295.850
Honda Türkiye	18.322	23.663	50.073	18.274	20.305	12.341
Hyundai Assan	60.895	90.190	81.590	48.652	77.000	90.231
Karsan	12.524	9.720	11.230	8.313	24.719	22.146
MAN Türkiye	2.501	2.069	1.696	1.544	1.132	1.610
Mercedes-Benz Türk	15.209	19.014	20.800	6.492	14.480	21.362
Otokar	2.775	2.534	3.023	2.560	2.236	3.062
Oyak Renault	228.593	263.656	286.695	277.572	307.083	330.994
Temsa	8.915	9.328	10.542	2.414	3.367	4.060
Tofaş-Fiat	178.434	212.493	267.436	94.179	312.245	307.788
Toyota	176.688	161.516	126.521	72.264	83.286	91.639
<b>Total</b>	<b>987.580</b>	<b>1.099.414</b>	<b>1.147.110</b>	<b>869.605</b>	<b>1.094.557</b>	<b>1.189.131</b>

Source: Automotive Manufacturers Association (OSD)

Oyak-Renault was the biggest manufacturer with 330.994 units of passenger cars vehicles, followed by Tofas-Fiat with 307.788 units of LCV's and passenger cars. Ford Otosan was the third top producer with 295.850 units, followed by Toyota with 91.639 units of passenger cars.

ANADOLU ISUZU is a joint venture between Turkey's Anadolu Group and Isuzu Motors and the Itochu Corporation. Its main area of operations is the production and marketing of commercial vehicles, including light trucks, trucks, pick-ups and midibuses.

BMC, is one of the Turkey's leading commercial vehicle manufacturers active in all commercial vehicle segments. In 1980s, all shares of BMC were acquired by Çukurova Holding. The company manufactures Levend and Megastar light trucks and heavy commercial vehicles; BMC Professional and BMC Fatih. Today, with its production capacity of 22.000 vehicles per annum, BMC export to over 70 countries around the world. The other major vehicle producer is FORD OTOSAN, a joint venture between Ford and Koc Holding which first began assembling Ford cars in 1984. Ford Otosan has three factories in Turkey. Since 2007, the company has been more interested in R&D activities through the establishment of Gebze Technology Center. The company TecFord Otosan, which has a 330,000 unit annually capacity, exports a major part of its production line.

HONDA TURKIYE, with its plant at Gebze near Istanbul, commenced operations in 1998, manufacturing passenger cars.

HYUNDAI ASSAN produces passenger cars, pick-ups and minibuses. The company is a joint venture between South Korea's Hyundai Motor Company and the Turkish company Kibar Holding. The Kocaeli plant is still Hyundai's only passenger car plant in Europe.

Based in Bursa, KARSAN, is engaged in the manufacture of Peugeot Partner, Hyundai HD 35/75, Renault Trucks Premium and Premium Lander under the Renault license, Citroen Berlingo under the Citroen license, its own brand Karsan J Series and BredaMenarinibus brand busses.

MAN Turkiye, based in Ankara, produces buses and trucks as part of a joint venture with German MAN.

MERCEDES-BENZ TURK was founded in 1967 as a joint venture between Daimler-Benz A.G., Mengerler Ticaret and Has Otomotiv under the name of Otomarsan. Mercedes-Benz Türk produces trucks and buses in two plants in Aksaray and Hoşdere/Istanbul. Today, foreign partners of the company are Daimler-Chrysler and Overseas Lending Group. The company is the largest full-size bus producer in Turkey.

OTOKAR manufactures a range of commercial vehicles. It produces passenger vans, mini-buses, pick-ups, police team vehicles and mobile patrol vehicles.

OYAK RENAULT, the largest producer of passenger cars in Turkey. Oyak Renault is a joint venture between the Turkish Oyak Group and the French carmaker Renault.

TEMSA, being one of Turkey's leading automotive companies, manufactures and distributes Temsa brand buses and coaches in domestic and international markets. At the same time, the Company represents Mitsubishi and Komatsu as their distributor in Turkey. The production capacity of Temsa Adana plant is 3,250 buses and coaches per year and 7,500 light trucks, which is annually 10,750 vehicles in total.

TOFAŞ is a joint venture between Fiat Auto and Koc Holding. In October 2000, Tofaş began production of the new Fiat model called Doblo, a light van/multi-purpose vehicle, which is aimed largely for the export market. The Doblo is exported mainly to European Countries. In 2007, TOFAŞ started its Minicargo project which includes producing the same light commercial vehicle for three different brands which are Fiorino (FIAT), Bipper (PEUGEOT) and Nemo (CITROEN).

Toyota Motor Manufacturing Turkey is one of Toyota's vehicle production bases in Europe. Located in Arifiye, Sakarya/Turkey, Toyota Turkey manufactures Verso and Auris models.

Most of the vehicle manufacturing companies are organized under the Automotive Manufacturers Association (OSD, Otomotiv Sanayicileri Derneği, <http://www.osd.org.tr>)

#### **Vehicle Park by Type 2006-2011 (Units)**

	2006	2007	2008	2009	2010	2011
Pass. Cars	6,140,992	6,472,404	6,800,105	7,056,945	7,498,086	8,109,122
Trucks	709,535	729,285	744,951	734,327	727,158	724,028
Pickups	1,695,624	1,901,350	2,064,809	2,190,750	2,381,865	2,606,503
Buses	175,949	195,344	192,715	201,292	207,903	225,253
Minibuses	357,523	377,665	386,272	384,348	386,502	386,149
Tractors	1,290,679	1,315,317	1,362,774	1,364,199	1,398,559	1,464,147
<b>Total</b>	<b>10,370,302</b>	<b>10,991,366</b>	<b>13,765,395</b>	<b>14,260,979</b>	<b>15,023,323</b>	<b>16,089,528</b>

Source: Turkish Statistical Institute (TUIK)

#### **Exports of The Automotive Industry**

Turkey's total automotive vehicle exports in 2011 reached 805.295 units, corresponding to a 11,2% increase in value compared to 2010. The export value of passenger cars, trucks and buses was US\$ 6,5 billion, US\$ 4 billion and more than US\$ 1 billion respectively. The main export markets for the automotive industry are France, Italy, Germany, the United Kingdom, the Russian Federation, Spain and USA.

#### **Export of The Automotive Industry (Value: US\$ 1,000; Quantity: Units)**

Products	2009		2010		2011	
	Units	Value	Units	Value	Units	Value
Passenger Cars	457.497	6.086.488	485.721	6.210.110	499.083	6.485.592
Trucks-Pickups	162.354	2.298.057	251.956	3.333.338	273.741	3.963.070
Buses-Minibuses-Midibuses	11.166	1.033.178	10.728	849.897	11.688	1.043.760
Tractors	12.705	259.547	14.020	271.158	16.148	369.038
<b>Total</b>	<b>643.722</b>	<b>9.667.270</b>	<b>762.425</b>	<b>10.664.503</b>	<b>800.660</b>	<b>11.861.461</b>

Source: Ministry of Economy of Turkey

**Automotive Industry Exports Of Turkey By Countries (First 20 Countries)**  
(Value: US\$ 1,000)

Country	2009	2010	Country	2010	2011
France	2.638.205	1.940.501	France	1.940.501	1.954.546
Italy	1.413.051	1.644.411	Italy	1.644.411	1.663.055
Germany	807.211	1.062.911	Germany	1.062.911	1.029.820
UK	656.773	937.101	UK	937.101	847.022
Spain	300.573	593.936	Russian Fed.	462.410	691.563
Russian Fed.	186.558	462.410	Spain	593.936	629.340
Israel	138.889	344.898	USA	336.308	511.775
Algeria	278.728	339.373	Belgium	275.919	506.418
USA	473.879	336.308	Holland	222.900	432.375
Belgium	444.251	275.919	Slovenia	164.400	415.351
Poland	170.016	243.846	Israel	344.898	319.629
Holland	121.037	222.900	Algeria	339.373	316.622
Sweden	86.340	172.130	Poland	243.846	233.974
Czech Rep.	92.247	170.102	Sweden	172.130	225.261
Slovenia	433.121	164.400	Austria	116.818	163.255
Portugal	68.486	132.847	Czech REP.	170.102	143.705
Romania	85.911	117.677	Romania	117.677	119.915
Austria	93.150	116.818	Switzerland	105.273	109.329
Switzerland	61.045	105.273	Brazil	43.826	103.187
Egypt	44.920	78.268	Ukraine	66.208	101.775
Others	1.082.872	1.202.466	Others	1.303.546	1.344.544
<b>Total</b>	<b>9.677.270</b>	<b>10.664.503</b>	<b>Total</b>	<b>10.664.503</b>	<b>11.861.461</b>

Source: Ministry of Economy of Turkey

## AUTOMOTIVE SPARE PARTS INDUSTRY

### Production

Turkish spare parts industry produces parts and pieces for the vehicles manufactured in our country and in the global market, as well as for the OEM and After Market.

Turkey has a strong component sector and in recent years, it has developed a highly competitive components industry providing products compatible with brands such as GM, Mercedes, BMW, Opel, Toyota, Fiat and Ford. The Turkish spare parts industry, with its large capacity, and a wide variety of production and high standards, supports automotive production and the vehicle park in Turkey (15 million vehicles), and has ample potential for exports.

The Turkish automotive and spare parts industry is concentrated in the Marmara Region, mainly in Bursa. Two major car factories and two "Organized Industrial Zones" are located in Bursa. Other important cities are Istanbul, İzmir, Kocaeli, Ankara, Konya, Adana and Manisa. Another development in the Turkish Auto Parts Industry is the establishment of the TAYSAD Components Manufacturers Industrial Zone (TOSB). The "Association of

Automotive Parts and Components Manufacturers” (TAYSAD, <http://www.taysad.org.tr>), began the TOSB project for its members in 1999. TOSB, covering a 2500 hectare area in Kocaeli, provides its members with larger production sites, modern environmental facilities, proximity to vehicle manufacturers, training and conference facilities, inter-enterprise cooperation, and a technology and innovation center.

Due to the high export potential of the sector and Turkey’s regional advantages, the spare parts sector has been attracting foreign investors. At present, the number of foreign investors in the spare parts sector is 200. Most of the world leaders in the sector have joint-ventures with Turkish companies.

Turkish automotive manufacturers are in direct contact with local spare parts manufacturers for procurement and 70% of these companies are SMEs. The total number of spare parts manufacturers in Turkey is about 4000. The export volume of spare parts sector reached US\$ 8.3 billion for the year 2011. The Turkish spare parts industry produces almost all parts and components. At present, the local parts and components production consists of:

- Engine and engine parts
- Power train parts and components
- Brake and clutch parts and components
- Hydraulic and pneumatic systems
- Suspension systems
- Security systems
- Rubber and plastic parts
- Chassis frame and parts
- Castings and forgings
- Electrical equipment and parts, lighting systems
- Batteries
- Auto glass
- Seats

Spare parts industry manufacturers are exerting intense efforts to obtain quality certificates. Most members of TAYSAD have quality certificates such as the ISO 9000 Series and others. In fact, Turkish spare parts manufacturers are the pioneers of Turkish companies for “The European Quality Award”. BRISA, a tyre producing company, was the first winner of “The European Quality Award” in 1996. Then, BEKSA won the “The European Quality Award” in the category of small and medium sized enterprises in 1997. BEKSA, which was established in 1987, produces steel cord and bead wire for tyre reinforcement and hose wire for high pressure hoses. In 2002, BOSCH Sanayi ve Ticaret A.S. was awarded with a prize in the “operational units category” in 2003 by European Foundation for Quality Management. The Bursa Bosch Diesel plant received the European Quality Award in the field of Organisational Excellence, the most prestigious award in the category. Bosch Bursa Diesel Plant has received the EFQM Excellence Award 2008 on the 28th of October during the Award Ceremony held in the Louvre Museum, Paris. Bosch Bursa Diesel plant is the first company in Turkey to win the EFQM Excellence Award for the second time. Bosch Sanayi ve Ticaret A.Ş. produces injectors, nozzle holder assemblies and injectors for common-rail systems.

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## **Exports of the Autoparts Industry**

Turkey's spare parts industry exports are increasing significantly with the focus on replacement components. The main spare parts products exported are engine parts, tyres and tubes, accessories for bodies, road wheels and parts, rubber parts for motor vehicles, transmission shafts and cranks. In fact, Turkey exports many cars, buses and trucks in parts. In terms of the breakdown of spare parts exports by province, Bursa, Istanbul, Kocaeli and Izmir have the major share. The number of companies in the spare parts industry is about 4000. Approximately 400 auto parts exporters operate in the country, and around 70% of their output is exported to the European Union.

Turkish spare parts products are destined for a wide range of countries in the world. The main export markets are Germany, France, the United Kingdom, Italy, Romania, Iran, Spain, the United States, Belgium, the Russian Federation, Poland, Brazil and the Netherlands.

Turkish spare parts exporters follow European and international standards and norms. Many supplier companies have important, high-level customers like Porsche, Bentley, BMW, Jaguar, Land Rover, Audi, Daimler Benz and Mercedes and major European producers such as OPEL, VW, FORD and GM.



**Exports of The Spare Parts Industry (Value: US\$ 1,000)**

Products	2009	2010	2011
Engine parts	858.885	1.103.525	1.413.080
Tyres and tubes	825.321	997.204	1.382.734
Accessories of bodies	496.581	563.485	691.425
Road wheels and parts	279.586	458.176	632.074
Rubber parts for motor vehicles	323.560	413.980	494.993
Diesel or semi-diesel engines	166.351	270.456	240.068
Transmission shaft and cranks, bearings	151.370	213.190	273.972
Brake and servo brakes	130.035	187.548	244.729
Batteries and parts	147.601	185.099	227.456
Clutches	119.029	153.561	166.578
Electrical lighting or signaling equipment	92.169	116.320	142.015
Suspension shock-absorbers	77.173	114.950	131.624
Seats of a kind used for motor vehicles	72.013	113.989	143.119
Safety seat belts	57.016	94.898	103.834
Filters	70.047	87.310	104.025
Ball Bearings	64.545	85.490	115.855
Axles	48.064	73.120	108.705
Auto Glasses	54.497	68.294	78.184
Airbags	53.306	64.527	74.306
Spark-ignition reciprocating or rotary internal combustion piston engines	34.201	51.102	54.461
Radiators	42.166	49.462	53.013
Electrical ignition or starting equipment of a kind used for spark-ignition or compression –ignition internal combustion engines	34.726	49.029	86.965
Gear boxes	25.992	43.745	56.155
Bodies for the motor vehicles	39.240	42.306	52.958
Silencers and exhaust pipes	33.332	41.571	60.266
Bumpers and parts there of	29.175	39.327	39.190
Steering wheels, steering columns and steering boxes	23.907	37.432	62.142
Engine pumps	14.702	22.083	26.383
Air condition for motor vehicles	10.110	18.436	20.354
Gaskets	13.496	17.873	21.745
Rear-view mirror for vehicles	8.318	10.346	13.800
Brake linings	2.354	3.766	4.866
Chassis fitted with engine for motor vehicles	294	493	385
Instrument panel clocks and clocks of a similar type for vehicles	194	156	184
Other automotive components	581.909	750.915	946.996
<b>Total</b>	<b>4.981.266</b>	<b>6.543.163</b>	<b>8.268.639</b>

Source: Ministry of Economy of Turkey

***Spare Parts Industry Exports of Turkey by Countries (First 20 Countries) (Value: US\$ 1,000)***

Country	2009	2010	Country	2010	2011
Germany	1.080.256	1.460.994	Germany	1.460.994	2.112.912
Romania	339.373	531.350	France	528.526	616.764
France	474.101	528.526	UK	471.319	561.296
Italy	385.775	472.028	Italy	472.028	558.917
UK	334.172	471.319	Romania	531.350	543.417
Iran	193.453	235.811	Iran	235.811	316.857
USA	94.648	212.526	Spain	208.833	256.562
Spain	160.637	208.833	USA	212.526	254.161
Russian. Fed.	89.711	198.477	Belgium	164.873	217.966
Belgium	143.333	164.873	Russian. Fed.	198.477	215.643
Poland	151.661	158.610	Poland	158.610	184.532
Egypt	74.730	100.138	Brazil	96.997	154.580
Brazil	72.070	96.997	Holland	91.359	132.090
Holland	59.037	91.359	Iraq	90.014	114.985
Iraq	71.089	90.014	Czech Rep.	66.566	93.020
Austria	56.673	66.592	Austria	66.592	90.266
Czech Rep.	43.573	66.566	Egypt	100.138	88.793
Algeria	54.497	60.640	Argentina	52.446	82.276
S. Arabia	43.517	56.735	S. Arabia	56.735	79.190
Argentina	27.064	52.446	India	43.513	76.172
<b>Others</b>	<b>1.031.886</b>	<b>1.218.319</b>	<b>Others</b>	<b>1.235.446</b>	<b>1.518.241</b>
<b>Total</b>	<b>4.981.265</b>	<b>6.543.163</b>	<b>Total</b>	<b>6.543.163</b>	<b>8.268.639</b>

Source: Ministry of Economy of Turkey

## TRADE FAIRS OF 2012

All of the trade fairs held in Turkey related to the automotive and auto parts industry are listed at the <http://www.fuarrehberi.org.tr> website which is an official website of the Union and Chambers of Commodity Exchanges of Turkey (TOBB). Some of the trade fairs related to the automotive and auto parts industry are listed below.

Fair	City	Date
Eurasia Moto Bike Expo	Istanbul	01.03.2012 - 04.03.2012
Subconist 2012 10. International Subcontracting Exhibition	Istanbul	14.03.2012 - 17.03.2012
Arüsder 2012	Istanbul	14.03.2012 - 17.03.2012
Alanya Car Show 2012	Alanya	12.04.2012 - 15.04.2012
Busworld Turkey	Istanbul	19.04.2012 - 21.04.2012
Best Car Show	Istanbul	19.04.2012 - 22.04.2012
Bursa Automotive Related Industry Fair 2012 5th Automotive Related Industry, Component And Spare	Bursa	10.05.2012 - 13.05.2012
Konya Autoshow Fair 2012 (6th)	Konya	15.05.2012 - 20.05.2012
On - Vehicle Equipment And Related Industry Fair	Konya	15.05.2012 - 20.05.2012
Blacksea Autoshow	Rize	21.05.2012 - 27.05.2012
Auto Show 2012 3rd Automotive And Supplier Industry Fair	Ankara	09.06.2012 - 16.06.2012
Afyonkarahisar Car, Commercial Vehicles And Spare Parts Industry Exhibition	Afyonkarahisar	05.09.2012 - 09.09.2012
Turkcast 2012 5. Foundry Products Trade Fair	Istanbul	13.09.2012 - 16.09.2012
Diyarbakir Autoshow Fair 2012	Diyarbakir	18.09.2012 - 23.09.2012
2. Autoshow 2012	Kirklareli	26.09.2012 - 30.09.2012
Autoshow 2012	Istanbul	02.11.2012 - 11.11.2012
Istanbul Autoshow 2012	Istanbul	02.11.2012 - 11.11.2012
Automotive 2012 18. International Automotive Supply Industry, Components, Accessories & Service	Istanbul	29.11.2012 - 02.12.2012

Source: Union and Chambers of Commodity Exchanges of Turkey

## USEFUL LINKS

- Uludag Exporter's Union  
[www.uib.org.tr](http://www.uib.org.tr)
- Automotive Manufacturers Association  
[www.osd.org.tr](http://www.osd.org.tr)
- Association of Automotive Parts and Components Manufacturers  
[www.taysad.org.tr](http://www.taysad.org.tr)



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MINISTRY OF ECONOMY

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