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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. 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.

*Table 1: 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's total capacity is approximately 1,8 million vehicles, of which 1.663.128 (92,6%) is for light vehicles (passenger cars, minibuses and pick-ups). The total vehicle production in 2016 was 1.485.927 units (excluding tractors) which is a record for the Turkish automotive industry.

**Table 2: Vehicle Production by Type 2012-2017 (Units)**

	2015	2016	2017
Passenger Cars	791.027	950.888	1.142.906
Trucks	35.838	17.374	23.502
Pickups	468.933	461.837	462.389
Buses	8.789	8.083	8.166
Mini-buses	47.078	44.415	55.036
Midi-buses	7.131	3.330	3.732
<b>Total</b>	<b>1.358.796</b>	<b>1.485.927</b>	<b>1.695.731</b>

**Source:** Automotive Manufacturers Association (OSD)

There are 9 commercial vehicle manufacturers in Turkey. Companies which are the leading producers and exporters in the agricultural tractor sector are TÜRK TRAKTOR, TUMOSAN, ERKUNT TRAKTOR, BAŞAK TRAKTOR and HATTAT TARIM.

**Table 3: Tractors Production (Units)**

2015	2016	2017
66.615	66.915	53.841

**Source:** The Turkish Association of Agricultural Machinery & Equipment Manufacturers (TARMAKBIR)

**Table 4: Vehicle Production by Major Manufacturers (Units) (Tractors included)**

	2015	2016	2017
Anadolu Isuzu	11.162	5.240	6.366
Ford Otosan	334.622	333.749	373.005
Honda Türkiye	12.667	15.163	28.742
Hyundai Assan	226.500	230.010	226.979
Karsan	7.239	5.647	6.027
MAN Türkiye	1.743	1.826	2.145
Mercedes-Benz Türk	23.941	14.116	17.143
Otokar	4.613	2.361	2.707
Oyak Renault	339.240	340.000	365.002
Temsa	2.922	3.084	3.539
Tofaş-Fiat	278.254	383.495	384.174
Toyota	115.893	151.236	279.902
Türk Traktör	47.536	46.031	48.302
Others	3.702	4.715	5.539
<b>Total</b>	<b>1.410.034</b>	<b>1.536.673</b>	<b>1.749.572</b>

**Source:** Automotive Manufacturers Association (OSD)

In 2017, Tofaş-Fiat was the biggest manufacturer with 384.174 units of vehicles, followed by Ford Otosan which was the second biggest manufacturer with 373.005 units of vehicles,

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followed by Oyak-Renault with 365.002 units of passenger cars, trucks, minibuses and pick-ups, followed by Hyundai with 227.000 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, buses and midibuses. The Çayırova manufacturing facility of the company is established on a 300 thousand square meters of land, and it has 97.000 square meters of indoor space. Along with the current manufacturing facilities and Machinery Park, its total annual production capacity is about 19.000 units.

BMC, is one of the Turkey's leading commercial and military vehicle manufacturers, continue to operate as a multinational firm under the partnership of Turkey and Qatar. To present, with its production of more than 300.000 units achieved to contribute 10 billion dolar added value to Turkish economy. BMC export to over 80 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. The company has been more interested in R&D activities through the establishment of Sancaktepe Engineering Center which is the one of the biggest R-D Centers in Turkey. The company Ford Otosan, which has a 415.000 unit annually capacity, exports a major part of its production line. The company achieved % 62 of total commercial vehicle production and %65 of commercial vehicle exports of Turkey in 2016.

HONDA TURKIYE, since 1997 has been manufacturing passenger cars, namely Civic Sedan models of Honda. at its plant at Gebze near Istanbul. The Gebze plant is the second passenger car production plant of Honda in Europe. The plant has a production capacity of 50.000 unit vehicles per year. The company exports Civic Sedan models to Europe (Germany, Poland and Romania, Egypt and Israel.

HYUNDAI ASSAN produces passenger cars, pick-ups and minibuses. The company which is a joint venture between South Korea's Hyundai Motor Company and the Turkish company Kibar Holding established its Kocaeli plant in 1997. The company is still Hyundai's only passenger car plant in Europe and has a total capacity of 245.000 units annually. Hyundai Assan is responsible for both production and exports of i10 and i20 models of Hyundai Motor Company in Europe. To present, the company has produced approximately 1,5 million vehicles and exported more than 1 million vehicles to 40 countries.

KARSAN, since 1966 which has been producing commercial vehicles in Bursa, 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. the Concept V1 platform, which Karsan developed initially in response to New York's Taxi of Tomorrow tender, is attempting to satisfy a global social demand.

MAN Türkiye, being the first production plant of MAN out of Germany, based in Ankara, produces buses and trucks as part of a joint venture with German MAN. MAN Turkey today is the biggest and the most integrated bus plant of MAN. MAN Turkey has increased its exports 9 times in the last decade. Now the company exports Man and Neoplan buses to 41 countries.

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, respectively. Today, Mercedes-Benz Türk is one of the biggest foreign direct investments in Turkey. The present share of Daimler AG in the company is %67. The company is the largest full-size bus producer in Turkey.

OTOKAR since 1963 has been operating at the factory built on a land of 552,000 m<sup>2</sup> in Sakarya. The company manufactures a range of commercial vehicles. It produces buses for public transportation, semi-trailers for transportation and logistics industry and tracked armoured vehicles and tactical armoured vehicles for the defense industry. passenger vans, mini-buses, pick-ups, police team vehicles and mobile patrol vehicles. Being a hundred percent Turkish capital company, Otokar is the main contractor in the Design and Prototype Development Project of ALTAY, the national battle tank of Turkey.

OYAK RENAULT, as one of the largest producer of passenger cars in Turkey is a joint venture between the Turkish Oyak Group and the French carmaker Renault since 1969. The company with a production capacity of 360.000 units vehicles and 750.000 units motor is the one of the biggest plant of Renault other than those in West Europe. Half a century old Oyak Renault, is one of the most successful FDI in Turkish history. The company also has an international logistics center and an R&D Center in Bursa plant. Its vehicles are exported to more than 60 countries.

TEMSA, being one of Turkey's leading automotive companies, manufactures and distributes Temsa brand buses and coaches in domestic and international markets. TEMSA's manufacturing facility in Adana has a single-shift annual production capacity of 4,500 buses and coaches and 7,500 light trucks, totaling 12,000 vehicles per year. TEMSA vehicles, designed and manufactured with in-house know-how, are sold to 46 countries. Temsa exports 40 % of its total bus and coach production. More than 90 % of its exports go to Western Europe and the United States, the remaining is shipped to Eastern Europe and the Turkic Republics.

TOFAŞ is a joint venture between Fiat Chrysler Automobiles (FCA), and Koc Holding. Turkish automotive company, Tofaş, today is one of the two R&D centres of FCA in Europe. Being the fifth largest industrial enterprise of Turkey, Tofaş has an annual manufacturing capacity of 400 thousand vehicles. Tofaş manufactures a range of passenger cars, Fiat Linea and Egea, as well as Light Commercial Vehicles for Fiat, Citroen, and Peugeot under its Minicargo project and for Fiat, Opel, Vauxhall, and RAM under its New Doblò Project in Bursa Plant. Tofaş undertakes the representation of 6 brands (Fiat, Alfa Romeo, Lancia, Jeep, Maserati, Ferrari) in the domestic market.

Toyota Motor Manufacturing Turkey is one of Toyota's vehicle production bases in Europe. Located in Arifiye, Sakarya/Turkey, Toyota Turkey manufactures Corolla, Verso and Toyota C-HR models. Majority of the production is exported to 97 countries, which are located in Europe, North America, South and North Africa, Middle East, Central Asia and Caucasus. Toyota Turkey is owned by Toyota Motor Europe NV/SA (%90), and Mitsui & Co., Ltd. (%10). Today, with an increased annual production capacity of 280,000 units, Toyota Motor Manufacturing Turkey (Toyota Turkey) is one of the ten biggest overseas manufacturing operations of Toyota, and one of the biggest manufacturing companies of Turkey.

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

**Table 5: Vehicle Park by Type (Units)**

	2015	2016	2017
Pass. Cars	10.589.337	11.325.558	12.020.449
Trucks	804.319	822.527	844.320
Pickups	3.255.299	3.437.739	3.643.907
Minibuses	449.213	463.989	488.817
Buses	217.056	231.995	222.189
Tractors	1.695.152	1.771.595	1.844.172
<b>Total</b>	<b>17.010.376</b>	<b>21.090.424</b>	<b>22.218.945</b>

**Source:** Turkish Statistical Institute (TUIK)

## EXPORTS OF THE AUTOMOTIVE INDUSTRY

In 2017 the total export value of passenger cars, trucks, buses and tractors was US\$ 19 billion. The main export markets for the automotive industry in 2017 are Italy, France, United Kingdom, Germany and Spain.

**Table 6: Export of the Automotive Industry (Value: US\$ 1,000)**

Automotive Industry Exports		EXPORTS (1.000\$)			
		2015	2016	2017	Change
HS	Product	Value	Value	Value	%
8701	Tractors	427.644	657.078	762.585	16,1
8702	Buses-Minibuses-Midibuses	1.198.717	1.503.091	1.620.570	7,8
8703	Passenger Cars	6.899.721	8.356.035	11.814.891	41,4
8704	Trucks-Pickups	4.248.864	4.578.026	4.821.147	5,3
<b>Automotive Industry</b>		<b>12.774.945</b>	<b>15.094.231</b>	<b>19.019.192</b>	<b>26,0</b>
<b>Automotive Spare Parts Industry</b>		<b>8.625.407</b>	<b>8.881.143</b>	<b>9.768.016</b>	<b>10,0</b>
<b>Automotive+Automotive Spare Parts Industry</b>		<b>21.400.352</b>	<b>23.975.374</b>	<b>28.787.208</b>	<b>20,1</b>

**Table 7: Automotive Industry Exports of Turkey by Countries (Value: US\$)**

Country	2015	2016	2017
Italy	1.377.696.535	2.259.795.024	2.578.780.063
France	1.450.021.357	1.818.820.502	2.270.339.421
UK	2.141.199.039	1.743.180.942	2.255.235.193
Germany	1.202.254.338	1.710.570.543	1.933.778.143
Spain	752.922.805	975.725.875	1.261.126.130
US	532.627.229	490.799.007	1.173.268.319
Belgium	662.117.804	609.888.294	851.024.756
Slovenia	586.143.684	691.013.077	771.877.912
Poland	268.392.250	416.068.345	656.128.163
Netherlands	344.652.749	591.201.707	583.314.633
Israel	431.457.192	386.739.244	457.558.725
Sweden	225.024.561	276.837.399	392.965.045
Morocco	187.984.418	195.983.152	248.649.118
Portugal	129.813.717	194.035.904	244.159.753
Denmark	208.072.585	205.132.798	236.141.025
Hungary	145.312.203	188.946.672	234.938.710
Austria	166.275.976	216.698.642	231.289.675
Ireland	183.124.133	187.327.701	193.931.701
Romania	90.481.646	131.026.195	177.742.221
Switzerland	118.661.116	121.044.250	157.947.894
<b>Others</b>	<b>1.570.709.676</b>	<b>1.683.395.294</b>	<b>2.108.289.154</b>
<b>Total</b>	<b>12.774.945.013</b>	<b>5.094.230.567</b>	<b>19.018.485.754</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 (21 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 about 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. %30 of those companies have international quality certificates (ISO 9000, QS 9000, ISO 14000 etc.).

The export volume of spare parts sector reached US\$ 8.9 billion for the year 2016. The Turkish spare parts industry produces almost all parts and components. At present, the local parts and components production consists of:

- Complete engines and engine parts
- Chassis parts and spare parts
- Radiators Forged and cast parts
- Heating, ventilating & air conditioning systems (HVAC systems)
- Electrical equipment and illumination systems
- Power trains, Batteries
- Brake and clutch parts and components
- Design and engineering services
- Hydraulic and pneumatic systems
- Suspension systems
- Security systems and safety parts
- Rubber and plastic parts
- Castings and forgings
- Batteries
- Auto glass
- Seats

## **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 500 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, Italy, Romania, the United Kingdom, USA, Spain, Iran, Belgium, Poland and the Russian Federation.

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 producers such as VW, FORD and GM.

**Table 8: Spare Parts Industry Exports of Turkey by Countries (Value: US\$)**

Country	2015	2016	2017
Germany	2.261.446.061	2.329.380.188	2.329.380.188
France	653.552.143	651.430.322	651.430.322
Italy	533.708.965	563.949.856	563.949.856
Romania	393.975.102	481.060.137	481.060.137
UK	473.987.566	457.268.239	457.268.239
USA	450.204.313	392.684.546	392.684.546
Iran	212.421.715	329.321.364	329.321.364
Spain	351.016.743	355.225.142	355.225.142
Belgium	297.267.628	299.593.104	299.593.104
Poland	206.149.489	255.270.921	255.270.921
Russian Federation	195.556.447	166.051.732	166.051.732
Morocco	112.453.247	147.909.476	147.909.476
Netherlands	101.992.196	114.365.486	114.365.486
Czech Republic	118.015.453	109.850.196	109.850.196
Slovenia	32.403.337	36.931.574	36.931.574
Algeria	78.524.819	84.624.573	84.624.573
Egypt	127.079.618	118.370.412	118.370.412
Iraq	110.908.840	88.123.247	88.123.247
Brasil	81.276.117	74.057.830	74.057.830
Hungary	84.151.556	75.727.069	75.727.069
<b>Others</b>	<b>1.749.315.730</b>	<b>1.749.947.209</b>	<b>1.907.844.417</b>
<b>Total</b>	<b>8.625.407.085</b>	<b>8.881.142.623</b>	<b>9.766.921.067</b>

**Source:** Ministry of Economy

## TRADE FAIRS

- [Fairs in Turkey](#)

## USEFUL LINKS

- Uludag Exporter's Union  
www.uib.org.tr
- Automotive Manufacturers Association  
www.osd.org.tr
- Association of Automotive Parts and Components Manufacturers  
www.taysad.org.tr
- Chambers of Commodity Exchanges of Turkey (TOBB)  
www.tobb.org.tr/



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