

PRESS REVIEW

Passenger Car and Light Commercial Vehicle Market

Showed a Decrease of 5% in the first 5 months of 2018.

*Passenger Car Market Decreased By 2%, Light Commercial Vehicle
Market Decreased By 13%.*

Turkey's passenger car and light commercial vehicle total market decreased by 4.78% in the first five months of 2018 compared to the same period of the previous year, to 302,311. In the five-month period of 2017, total market sales figure was 317,500.

Passenger car sales went down by 2.13% in the first five months of 2018, compared to the same period of previous year, to 234,645. In the same period of 2017, the sales were 239,760.

In January-May period of 2018, light commercial vehicle market decreased by 12.96%, in comparison to the year before, to 67,666. In the same period of previous year, the sales were 77,740.

Passenger Car and Light Commercial Vehicle Market

Showed a Decrease of 15% in May 2018.

*Passenger Car Market Decreased By 13%, Light Commercial
Vehicle Market Decreased By 21%.*

In May 2018, passenger car and light commercial vehicle market decreased to 72,755. In comparison to the total number of 85,422 in May 2017, the sales went down in a ratio of 14.83%.

In May 2018, passenger car sales went down by 13.03% in comparison to the same month of the year before and were 57,227. Last year, the sales were 65,799.

Light commercial vehicle market decreased by 20.87% in May 2018 compared to May 2017, to 15,528. Last year, the sales were 19,623.



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By the end of May 2018, a decrease of 2.4% in the sales of passenger cars below 1600cc and a decrease of 1.4% in the sales of passenger cars with a 1600-2000cc motor volume was observed. As for the sales of the passenger cars over 2000cc, a decrease of 27.0% was observed. 84 electric cars and 1,843 hybrid passenger cars were sold in the first five months of 2018.

When the average emission values of the passenger car market in the end of May 2018 are considered, the passenger cars between 100-120g/km took the largest share with a ratio of 41.67%, with a number of 97,770.

At the end of May 2018, diesel passenger car sales share decreased to 60.61%, while the automatic transmission passenger car sales share increased to 65.12%.

At the end of May 2018, 83.62% of the passenger car market segment again consisted of the vehicles in the A, B and C segments. When evaluated according to segments, Segment C with a share of 54.9% reached the highest sales volume (128,735). When evaluated according to frame, most preferred body type was again Sedan (50.8%, a quantity of 119,090).

At the end of May 2018, when evaluated according to body type, Vans with a share of 69.06% had the highest sales volume (46,732), Light trucks followed them with a share of 12.07% (8,168) while the share of Pick-ups was 10.03% (6,786) and the share of Minibuses was 8.84% (5,980) in light commercial vehicle market.

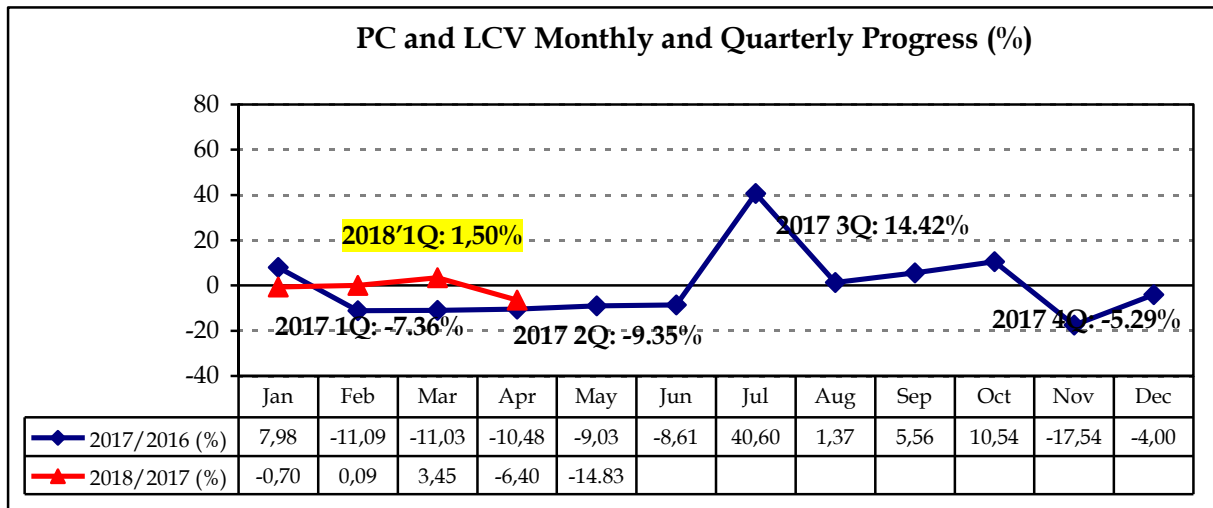
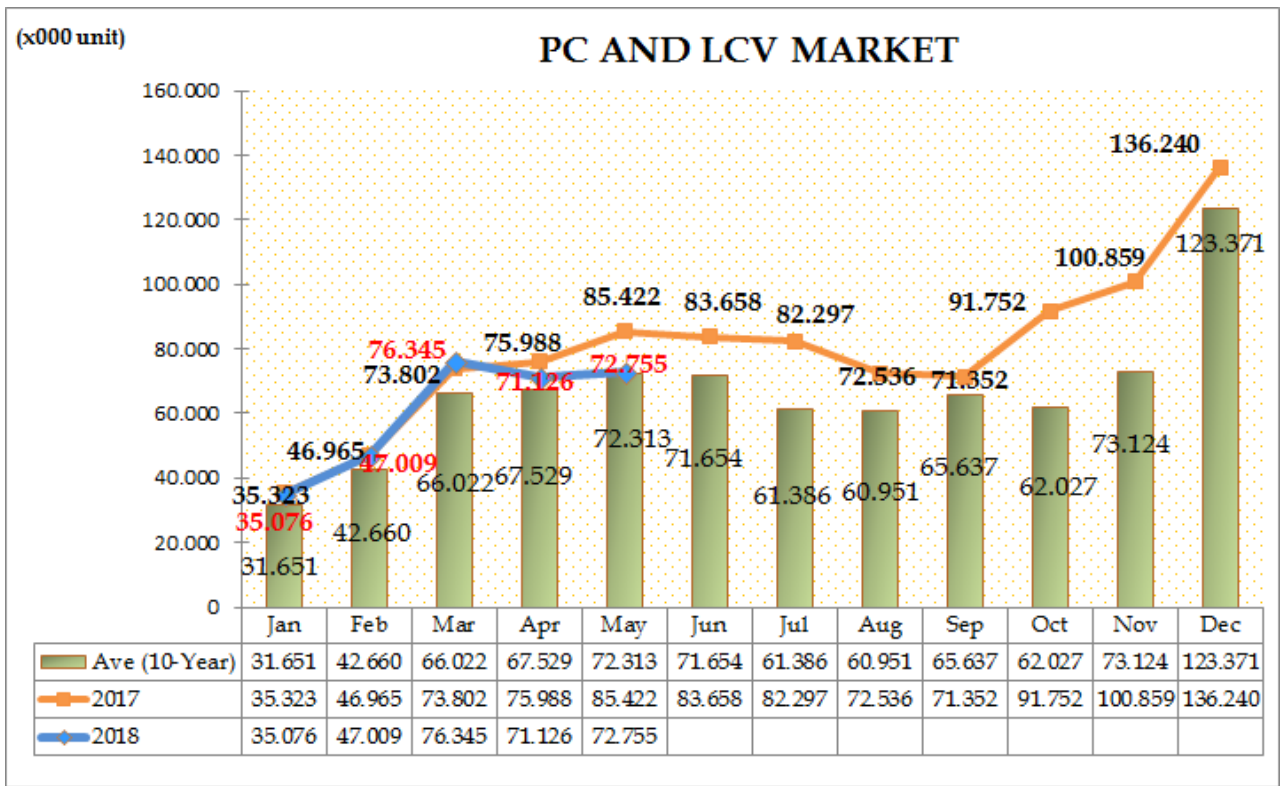
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PRESS RELEASE

In the first five months of 2018, Turkey's passenger car and light commercial vehicle total market presented a sales number of 302,311. In comparison to the total number of 317,500, the sales went down in a ratio of 4.78%.

In May 2018, passenger car and light commercial vehicle market presented a sales number of 72,755. In comparison to the total number of 85,422 in May 2017, the sales went down in a ratio of 14.83%.

The passenger car and light commercial vehicle market, in comparison to the average 10-year May sales, showed an increase of 0.61%.

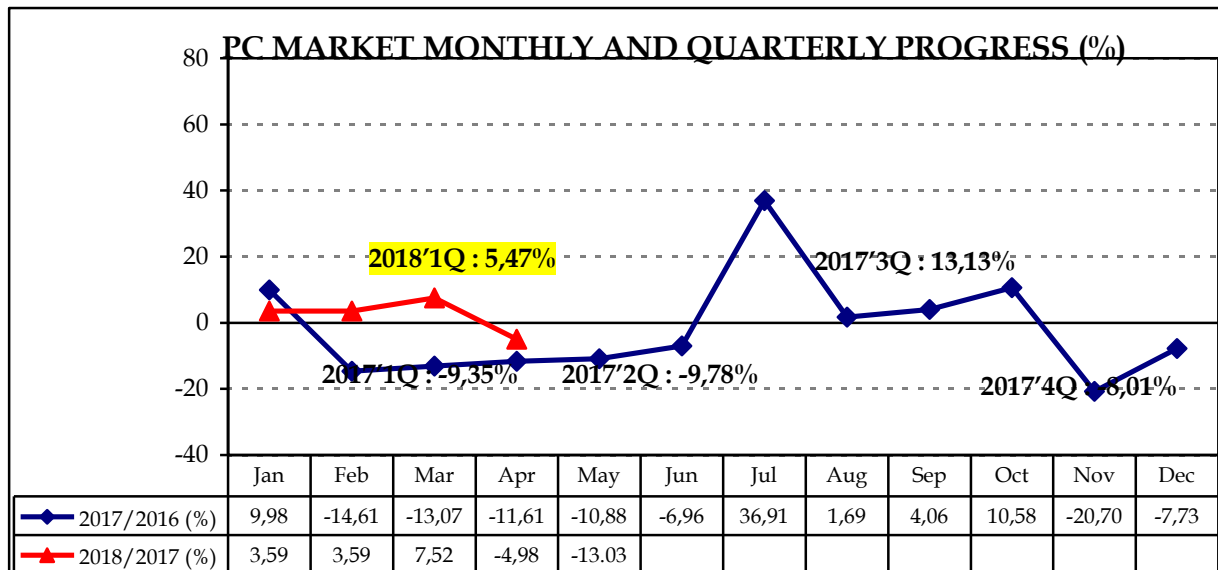
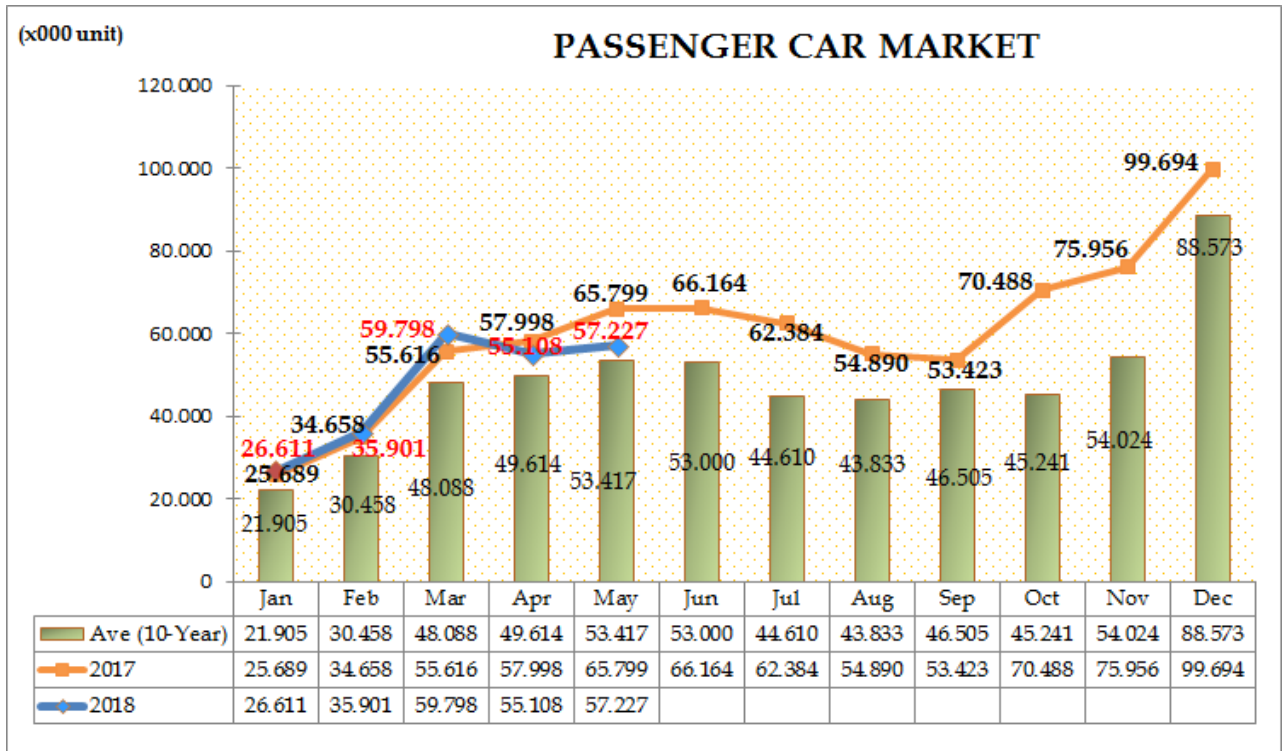


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In the first five months of 2018, passenger car sales went down by 2.13% in comparison to the same period of previous year and were 234,645. In the same period of previous year, the sales were 239,760.

In May 2018, passenger car sales went down by 13.03% in comparison to the same month of the year before and were 57,227. In May 2017, the sales were 65,799.

The passenger car market, in comparison to the average 10-year May sales, showed an increase of 7.15%.

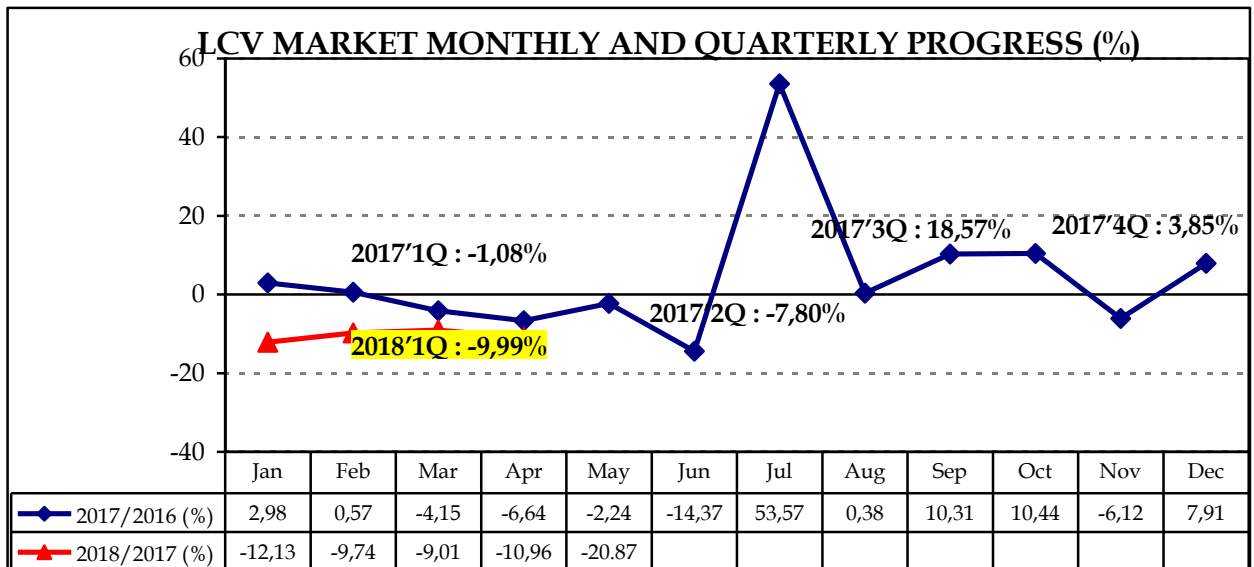
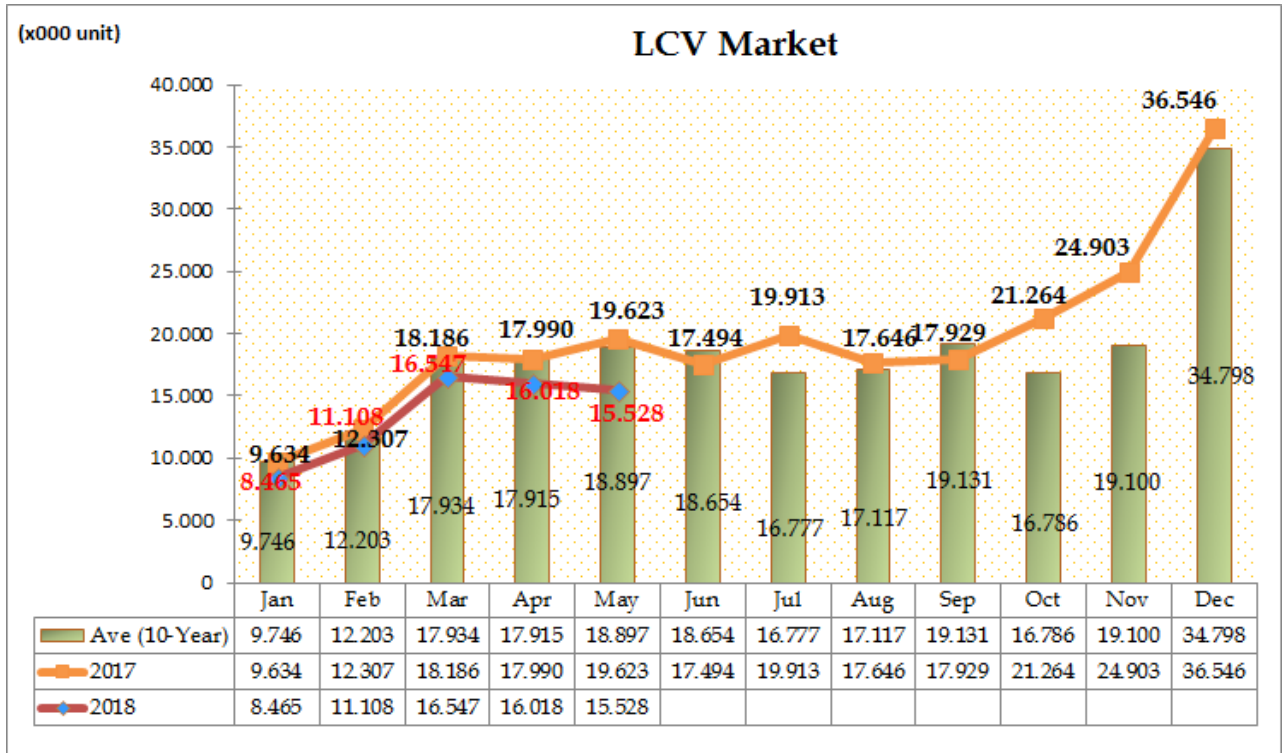


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In January-May period of 2018, light commercial vehicle sales decreased by 12.96% in comparison to the same period of the last year, to 67,666. In the same period of previous year, the sales were 77,740.

In May 2018, light commercial vehicle sales decreased by 20.87% in comparison to the same month of previous year, to 15,528. In May 2017, the sales were 19,623.

The light commercial vehicle market, in comparison to the average 10-year May sales, showed a decrease of 17.83%.



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When the end of May 2018 passenger car market is studied in terms of engine volume, the biggest slice of the pie was taken by passenger cars under 1600cc with a ratio of 96.03% and a number of 225,334. Passenger cars between 1600cc to 2000cc followed them with a ratio of 2.88% and passenger cars above 2000cc with a ratio of 0.26%. In comparison with the same period of 2017, a decrease of 2.4% in the sales of passenger cars below 1600cc and a decrease of 1.4% in the sales of passenger cars with a 1600-2000cc motor volume was observed. As for the sales of the passenger cars over 2000cc, a decrease of 27.0% was observed. 63 electric cars below 85kW engine power, 21 electric cars above 121kW engine power; 84 electric cars in total were sold in May 2018.

At the end of May 2018, 255 hybrid cars under 1600cc, 1,443 hybrid cars between 1601cc-1800cc (>50kW), 12 hybrid cars between 1801cc - 2000cc, 129 hybrid cars between 2001cc-2500cc (>100KW) and 4 hybrid cars above 2500cc were sold. 1,843 hybrid cars were sold in January-May period of 2018.

ENGINE VOLUME	ENGINE TYPE	End of May 2017		End of May 2018		Change	SCT %	VAT %
		Qty	Segment	Qty	Segment			
≤ 1600cc	B/D	230.922	96,31%	225.334	96,03%	-2,4%	45, 50, 60	
1601cc - ≤ 2000cc	B/D	6.858	2,86%	6.765	2,88%	-1,4%	100, 110	
≥ 2001cc	B/D	848	0,35%	619	0,26%	-27,0%	160	
≤ 85 kW	ELECTRIC	3	0,00%	63	0,03%	2000,0%	3	
86kW - ≤ 120kW	ELECTRIC	0	0,00%	0	0,00%		7	
≥ 121kW	ELECTRIC	24	0,01%	21	0,01%	-12,5%	15	
≤1600cc	HYBRID	84	0,04%	255	0,11%	203,6%	60	
1601cc - ≤1800cc (<=50KW)	HYBRID	0	0,00%	0	0,00%		110	18
1601cc - ≤1800cc (>50KW)	HYBRID	961	0,40%	1.443	0,61%	50,2%	60	
1801cc - ≤2000cc	HYBRID	22	0,01%	12	0,01%		110	
2001cc - ≤2500cc (<=100KW)	HYBRID	0	0,00%	0	0,00%		160	
2001cc - ≤2500cc (>100KW)	HYBRID	32	0,01%	129	0,05%	303,1%	110	
>2500cc	HYBRID	6	0,00%	4	0,00%	-33,3%	160	
Total		173.961	239.760	100,00%	234.645	100,00%	-2,13%	

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When the end of May 2018 passenger car market is studied in terms of average emission values, passenger cars between 100-120 gr/km have the highest share of 41.67% (97,770) and following this, passenger cars between 120-140 gr/km have a share of 21.89% (51,364).

CO2 AVERAGE EMISSION VALUES (gr/km)	End of May 2017		End of May 2018		Change
	Qty	Segment	Qty	Segment	
< 100 gr/km	37.573	15,67%	42.966	18,31%	14,35%
≥ 100 - < 120 gr/km	108.284	45,16%	97.770	41,67%	-9,71%
≥ 120 - < 140 gr/km	57.252	23,88%	51.364	21,89%	-10,28%
≥ 140 - < 160 gr/km	29.672	12,38%	35.019	14,92%	18,02%
≥ 160 gr/km	6.979	2,91%	7.526	3,21%	7,84%
Total	239.760	100,00%	234.645	100,00%	-2,13%

In the end of May 2018, diesel passenger car sales decreased by 3.57% in comparison to the same period of previous year. Diesel share in passenger car sales at the end of May 2018, when compared to the same period of 2017, decreased to 60.61% (142,228).

DIESEL	End of May 2017		End of May 2018		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	0	0,00%	1	0,15%	#SAYI/0!
B (Entry)	51.197	67,20%	42.077	62,98%	-17,81%
C (Compact)	76.001	59,17%	77.974	60,57%	2,60%
D (Medium)	16.519	64,22%	18.373	60,96%	11,22%
E (Luxury)	2.605	36,65%	2.579	37,59%	-1,00%
F (Upper Luxury)	1.176	80,44%	1.224	84,76%	4,08%
Total	147.498	61,52%	142.228	60,61%	-3,57%

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End of May 2018	1	2	3	4	5	6	7	Toplam	Pay
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	1	629	0	0	0	31	0	661	0,3%
B (Entry)	15.143	39.252	1.930	187	3.330	55	6.910	66.807	28,5%
C (Compact)	77.570	16.133	473	2.191	0	565	31.803	128.735	54,9%
D (Medium)	21.314	1.771	153	22	0	1.022	5.856	30.138	12,8%
E (Luxury)	4.849	0	14	5	0	189	1.803	6.860	2,9%
F (Upper Luxury)	213	0	0	0	0	72	1.159	1.444	0,6%
Total	119.090	57.785	2.570	2.405	3.330	1.934	47.531	234.645	100,0%
	50,8%	24,6%	1,1%	1,0%	1,4%	0,8%	20,3%	100,0%	

End of May 2017	1	2	3	4	5	6	7	Toplam	Pay
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	773	0	0	0	62	0	835	0,3%
B (Entry)	18.097	44.576	2.139	438	4.883	70	5.985	76.188	31,8%
C (Compact)	75.235	21.766	768	2.360	0	836	27.479	128.444	53,6%
D (Medium)	20.241	656	310	12	0	756	3.748	25.723	10,7%
E (Luxury)	5.319	3	23	4	0	200	1.559	7.108	3,0%
F (Upper Luxury)	244	0	0	0	0	96	1.122	1.462	0,6%
Total	119.136	67.774	3.240	2.814	4.883	2.020	39.893	239.760	100,0%
	49,7%	28,3%	1,4%	1,2%	2,0%	0,8%	16,6%	100,0%	
Change	1	2	3	4	5	6	7	Toplam	
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)		-18,6%						-20,8%	
B (Entry)	-16,3%	-11,9%	-9,8%	-57,3%	-31,8%	-21,4%	15,5%	-12,3%	
C (Compact)	3,1%	-25,9%	-38,4%	-7,2%		-32,4%	15,7%	0,2%	
D (Medium)	5,3%	170,0%	-50,6%			35,2%	56,2%	17,2%	
E (Luxury)	-8,8%		-39,1%	25,0%		-5,5%	15,7%	-3,5%	
F (Upper Luxury)	-12,7%					-25,0%	3,3%	-1,2%	
Toplam	0,0%	-14,7%	-20,7%	-14,5%	-31,8%	-4,3%	19,1%	-2,1%	

At the end of May 2018, 83.62% of the passenger car market segment consisted of the vehicles in the A, B and C segments again. When evaluated according to segments, Segment C with a share of 54.9% has the highest sales volume (128,735) and Segment B follows it with a share of 28.5% (66,807).

At the end of May 2018, when evaluated according to frame type, most preferred body type was Sedan again (50.80%, a quantity of 119,090). Following Sedan passenger cars are Hatchback frame with a share of 24.6% and a sales volume of 57,785 and SUV with a share of 20.3% and total sales volume of 47,531.

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At the end of May 2018, automatic transmission passenger car sales numbers, in comparison to the same period in 2017, increased by 8.77%. Automatic transmission passenger car sale shares at the end of May 2018, in comparison to the same period of the previous year, increased from 58.59% to 65.12% (a number of 152,794).

AUTOMATIC TRANSMISSION	End of May 2017		End of May 2018		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	649	77,72%	566	85,63%	-12,79%
B (Entry)	31.716	41,63%	31.238	46,76%	-1,51%
C (Compact)	76.122	59,26%	84.837	65,90%	11,45%
D (Medium)	23.422	91,05%	27.852	92,41%	18,91%
E (Luxury)	7.106	99,97%	6.857	99,96%	-3,50%
F (Upper Luxury)	1.462	100,00%	1.444	100,00%	-1,23%
Total	140.477	58,59%	152.794	65,12%	8,77%

In the end of May 2018, when evaluated according to body type, Vans with a share of 69.06% had the highest sales volume (46,732), Light trucks followed them with a share of 12.07% (8,168) while the share of Pick-ups was 10.03% (6,786) and the share of Minibuses was 8.84% (5,980) in light commercial vehicle market.

LIGHT COMMERCIAL VEHICLE BODY TYPE ANALYSIS	End of May 2017		End of May 2018		Change
	Qty	Segment	Qty	Segment	
VAN	54.194	69,71%	46.732	69,06%	-13,77%
LIGHT TRUCK	10.011	12,88%	8.168	12,07%	-18,41%
MINIBUS	6.572	8,45%	5.980	8,84%	-9,01%
PICK-UP	6.963	8,96%	6.786	10,03%	-2,54%
Total	77.740	100,00%	67.666	100,00%	-12,96%