

PRESS REVIEW

Passenger Car and Light Commercial Vehicle Market Showed a Decrease of 33% in the ten months of 2018.

Passenger Car Market Decreased By 31%, Light Commercial Vehicle Market Decreased By 39%.

Turkey's passenger car and light commercial vehicle total market decreased by 32,55% in the first ten months of 2018 compared to the same period of the previous year, to 485.027. In the ten-month period of 2017, total market sales figure was 719.095.

Passenger car sales went down by 30,68% in the first ten months of 2018, compared to the same period of previous year, to 379.274. In the same period of 2017, the sales were 547.109.

In January-October period of 2018, light commercial vehicle market decreased by 38,51%, in comparison to the year before, to 105.753. In the same period of previous year, the sales were 171.986.

Passenger Car and Light Commercial Vehicle Market Showed a Decrease of 76,5% in October 2018.

Passenger Car Market Decreased By 76%, Light Commercial Vehicle Market Decreased By 78%.

In October 2018, passenger car and light commercial vehicle market decreased to 21.571. In comparison to the total number of 91.752 in October 2017, the sales went down in a ratio of 76,49%.

In October 2018, passenger car sales went down by 76,15% in comparison to the same month of the year before and were 16.809. Last year, the sales were 70.488.

Light commercial vehicle market decreased by 77,61% in October 2018 compared to October 2017, to 4.762. Last year, the sales were 21.264.

By the end of October 2018, a decrease of 30,8% in the sales of passenger cars below 1600cc and a decrease of 33,9% 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 27,9% was observed. 124 electric cars and 3.331 hybrid passenger cars were sold in the first ten months of 2018.

When the average emission values of the passenger car market in the end of October 2018 are considered, the passenger cars between 100-120g/km took the largest share with a ratio of 40,44%, with a number of 153.374.

At the end of October 2018, diesel passenger car sales share decreased to 58,94%, while the automatic transmission passenger car sales share increased to 65.50%.

At the end of October 2018, 83,6% 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 55,7% reached the highest sales volume (a quantity of 211.155). When evaluated according to frame, most preferred body type was again Sedan (50,7%, a quantity of 192.428).

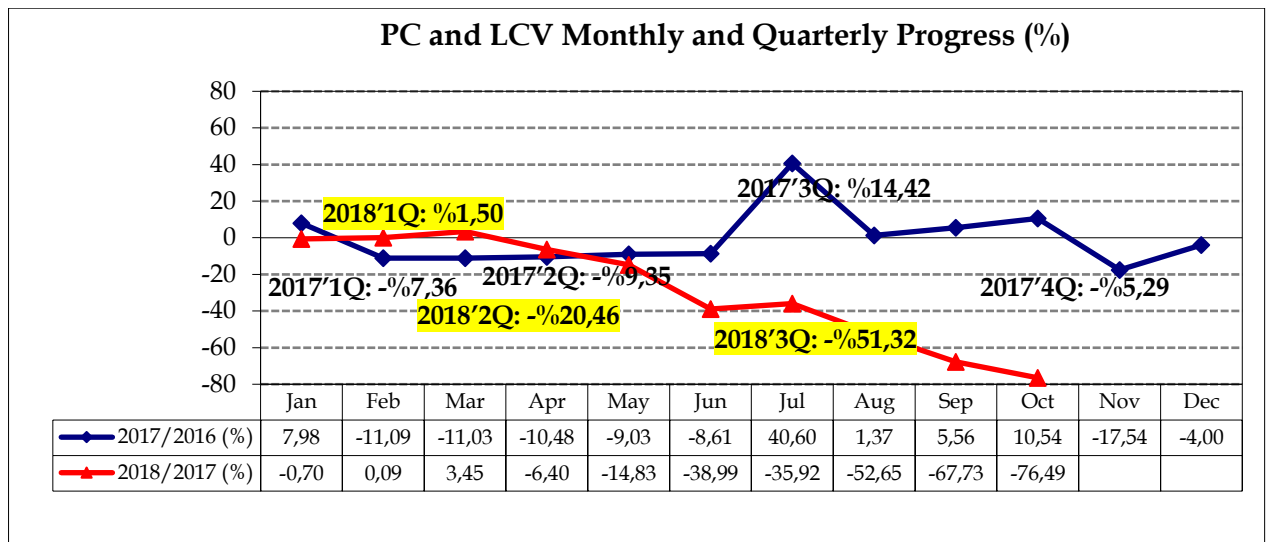
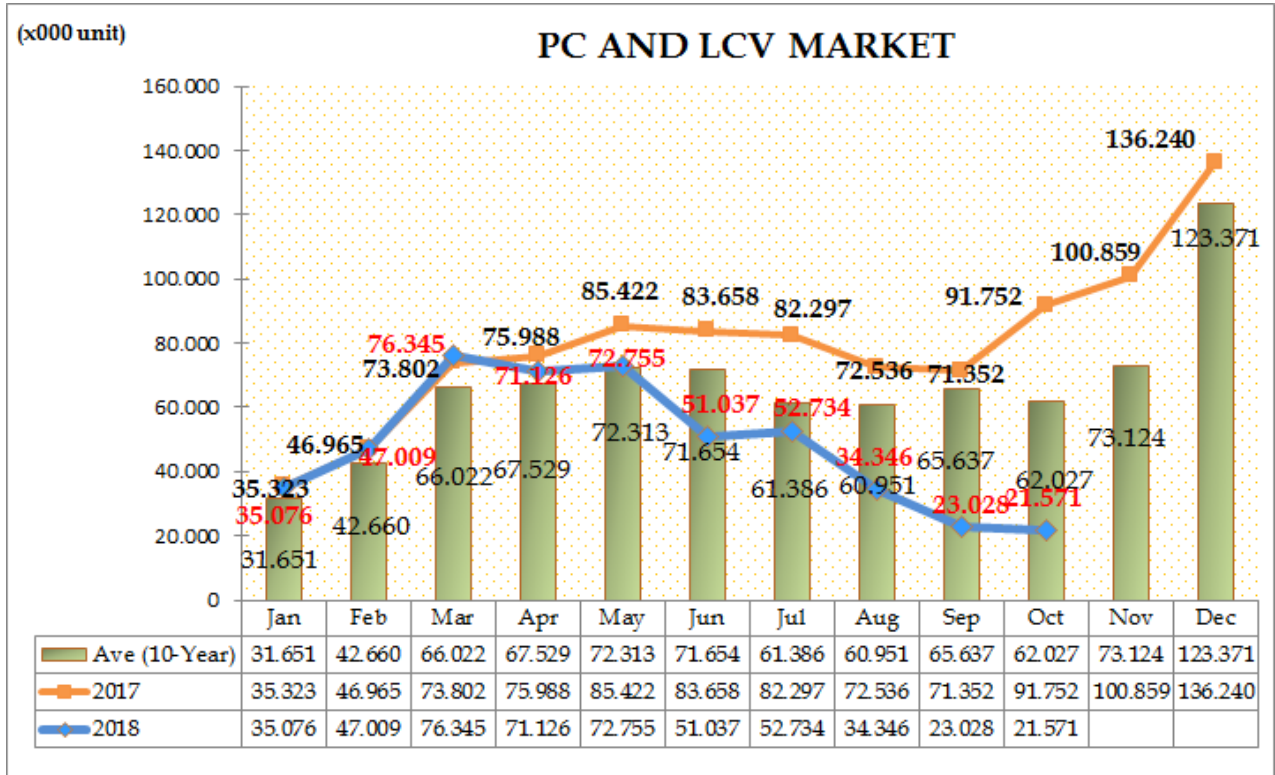
At the end of October 2018, in light commercial vehicle market, when evaluated according to body type, Van's with a share of 68,50% had the highest sales volume (72.445), Light trucks followed them with a share of 12,21% (12.915) while the share of Pick-ups was 10,46% (11.059) and the share of Minibuses was 8,83% (9.334).

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In the first ten months of 2018, Turkey's passenger car and light commercial vehicle total market decreased by %32,55 and presented a sales number of 485.027. Last year, the sales were 719.095.

In October 2018, passenger car and light commercial vehicle market presented a sales number of 21.571. In comparison to the total number of 91.752 in October 2017, the sales went down in a ratio of 76,49%.

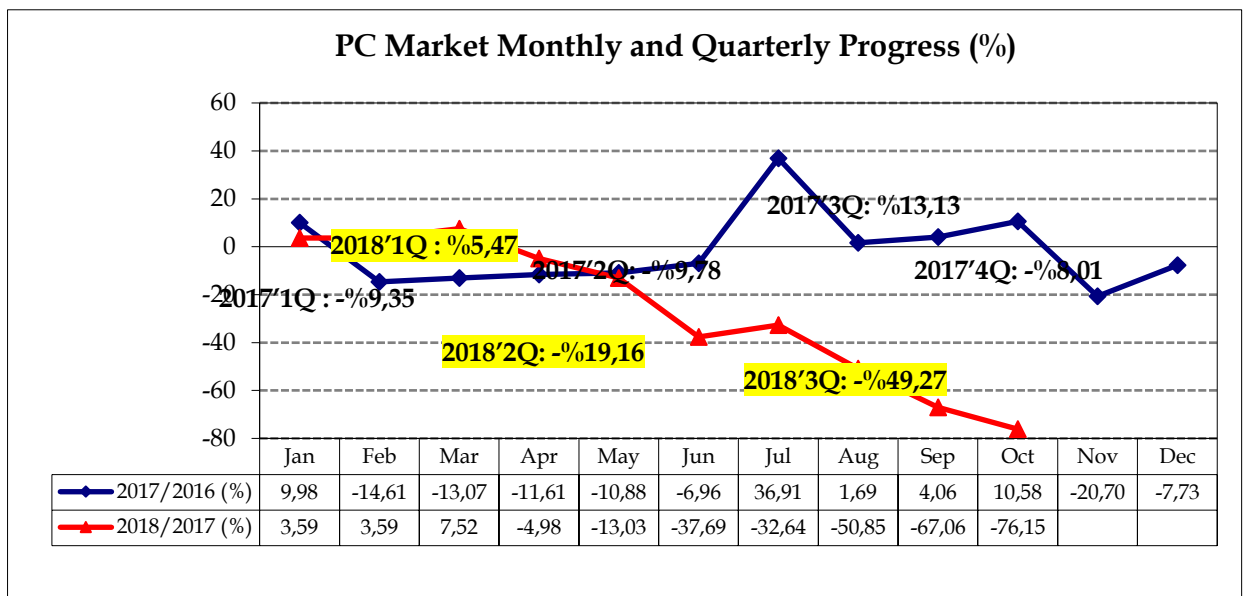
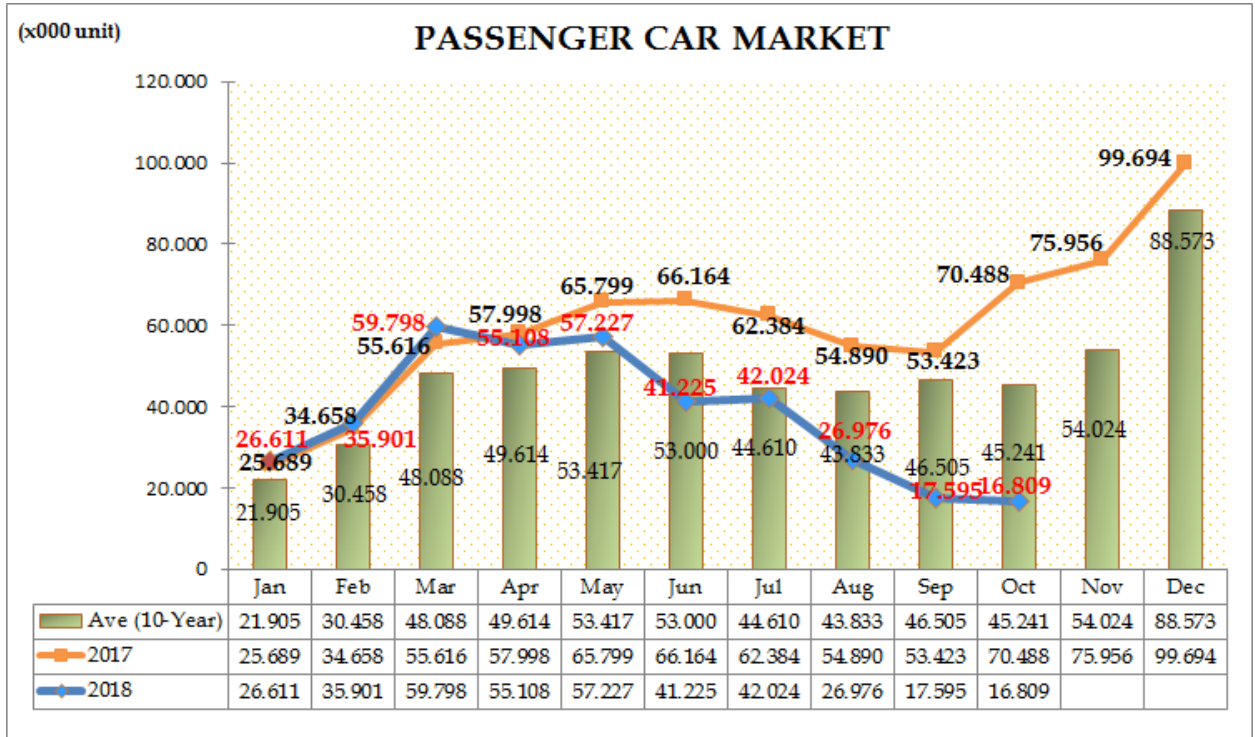
The passenger car and light commercial vehicle market, in comparison to the average 10-year October sales, showed a decrease of 65,22%.



In the first ten months of 2018, passenger car sales went down by 30,68% in comparison to the same period of previous year and were 379.274. In the same period of previous year, the sales were 547.109.

In October 2018, passenger car sales went down by 76,15% in comparison to the same month of the year before and were 16.809. In October 2017, the sales were 70.488.

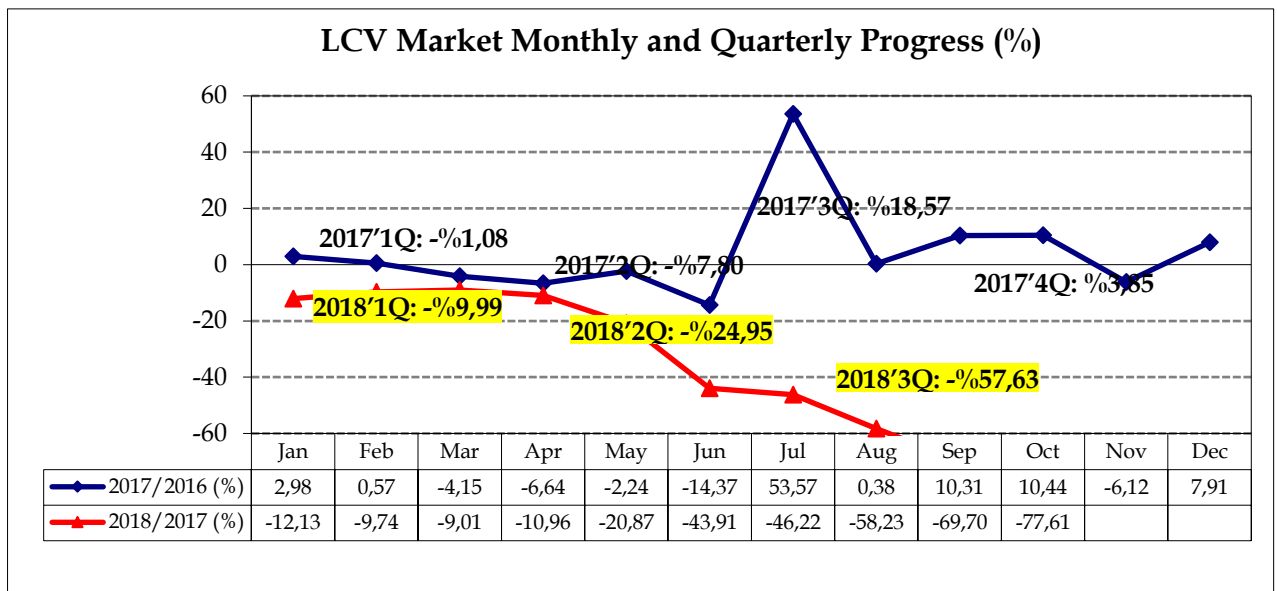
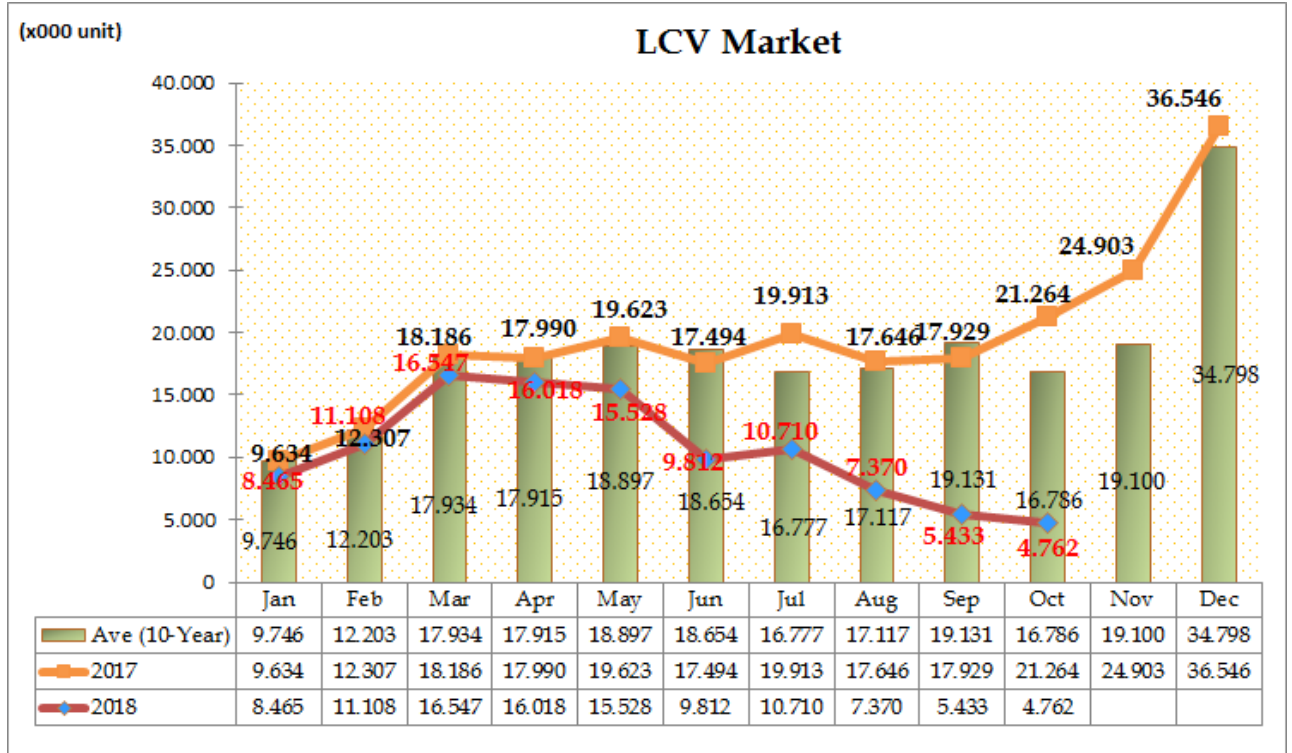
The passenger car market, in comparison to the average 10-year October sales, showed a decrease of 62,85%.



In January-October period of 2018, light commercial vehicle sales decreased by 38,51% in comparison to the same period of the last year, to 105.753. In the same period of previous year, the sales were 171.986.

In October 2018, light commercial vehicle sales decreased by 77,61% in comparison to the same month of previous year, to 4.762. In October 2017, the sales were 21.264.

The light commercial vehicle market, in comparison to the average 10-year October sales, showed a decrease of 71,63%.



When the end of October 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 95,88% and a number of 363.635. Passenger cars between 1600cc to 2000cc followed them with a ratio of 2,91% and passenger cars above 2000cc with a ratio of 0,30%. In comparison with the same period of 2017, a decrease of 30,8% in the sales of passenger cars below 1600cc and a decrease of 33,9% 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 27,9% was observed. 76 electric cars below 85kW engine power and 48 electric cars above 121 Kw, a total of 124 electric cars were sold in the first ten months of 2018.

At the end of October 2018, 470 hybrid cars under 1600cc, 2,605 hybrid cars between 1601cc-1800cc (>50kW), 30 hybrid cars between 1801cc - 2000cc, 220 hybrid cars between 2001cc-2500cc (>100KW) and 6 hybrid cars above 2500cc were sold. 3.331 hybrid cars were sold in January-October period of 2018.

ENGINE VOLUME	ENGINE TYPE	End of October 2017		End of October 2018		Change	SCT %	VAT %
		Qty	Segment	Qty	Segment			
≤ 1600cc	B/D	525.531	96,06%	363.635	95,88%	-30,8%	45, 50, 60	
1601cc - ≤ 2000cc	B/D	16.689	3,05%	11.038	2,91%	-33,9%	100, 110	
≥ 2001cc	B/D	1.589	0,29%	1.146	0,30%	-27,9%	160	
≤ 85 kW	ELECTRIC	17	0,00%	76	0,02%	347,1%	3	
86kW - ≤ 120kW	ELECTRIC	0	0,00%	0	0,00%	#SAYI/0!	7	
≥ 121kW	ELECTRIC	33	0,01%	48	0,01%	45,5%	15	
<=1600cc	HYBRID	323	0,06%	470	0,12%	45,5%	60	
1601cc - <=1800cc (<=50KW)	HYBRID	0	0,00%	0	0,00%	#SAYI/0!	110	18
1601cc - <=1800cc (>50KW)	HYBRID	2.688	0,49%	2.605	0,69%	-3,1%	60	
1801cc - <=2000cc	HYBRID	44	0,01%	30	0,01%	-31,8%	110	
2001cc - <=2500cc (<=100KW)	HYBRID	0	0,00%	0	0,00%	#SAYI/0!	160	
2001cc - <=2500cc (>100KW)	HYBRID	187	0,03%	220	0,06%	17,6%	110	
>2500cc	HYBRID	8	0,00%	6	0,00%	-25,0%	160	
Total		547.109	100,00%	379.274	100,00%	-30,68%	TAX RATES	

When the end of October 2018 passenger car market is studied in terms of average emission values, passenger cars between 100-120 gr/km have the highest share of 40,44% (153.374) and following this, passenger cars between 120-140 gr/km have a share of 21,88% (82.978).

CO2 AVERAGE EMISSION VALUES (gr/km)	End of October 2017		End of October 2018		Change
	Qty	Segment	Qty	Segment	
< 100 gr/km	82.869	15,15%	68.403	18,04%	-17,46%
≥ 100 - < 120 gr/km	250.120	45,72%	153.374	40,44%	-38,68%
≥ 120 - < 140 gr/km	130.143	23,79%	82.978	21,88%	-36,24%
≥ 140 - < 160 gr/km	68.343	12,49%	62.216	16,40%	-8,97%
≥ 160 gr/km	15.634	2,86%	12.303	3,24%	-21,31%
Total	547.109	100,00%	379.274	100,00%	-30,68%

In the end of October 2018, diesel passenger car sales decreased by 32,99% in comparison to the same period of previous year. Diesel share in passenger car sales at the end of October 2018, when compared to the same period of 2017, decreased to 58,94% (223.539).

DIESEL	End of October 2017		End of October 2018		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	1	0,06%	0	0,00%	-100,00%
B (Entry)	112.719	66,57%	64.642	61,77%	-42,65%
C (Compact)	171.471	59,12%	122.464	58,00%	-28,58%
D (Medium)	41.314	62,27%	30.285	62,32%	-26,70%
E (Luxury)	5.706	34,23%	4.106	36,31%	-28,04%
F (Upper Luxury)	2.396	81,69%	2.042	83,45%	-14,77%
Total	333.607	60,98%	223.539	58,94%	-32,99%

End of October 2018	1	2	3	4	5	6	7	Total	Share
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	1.036	0	0	0	77	0	1.113	0,3%
B (Entry)	23.498	61.802	3.249	318	4.843	112	10.834	104.656	27,6%
C (Compact)	125.466	27.507	754	3.134	562	858	52.874	211.155	55,7%
D (Medium)	35.338	2.535	269	31	0	1.021	9.402	48.596	12,8%
E (Luxury)	7.720	0	26	5	0	332	3.224	11.307	3,0%
F (Upper Luxury)	406	0	0	0	0	196	1.845	2.447	0,6%
Total	192.428	92.880	4.298	3.488	5.405	2.596	78.179	379.274	100,0%
	50,7%	24,5%	1,1%	0,9%	1,4%	0,7%	20,6%	100,0%	

End of October 2017	1	2	3	4	5	6	7	Toplam	Pay
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	1.697	0	0	0	103	0	1.800	0,3%
B (Entry)	38.675	100.679	4.560	755	8.973	173	15.510	169.325	30,9%
C (Compact)	169.615	49.714	1.714	4.601	0	1.957	62.433	290.034	53,0%
D (Medium)	49.649	3.842	602	31	0	1.666	10.557	66.347	12,1%
E (Luxury)	12.449	6	38	4	0	470	3.703	16.670	3,0%
F (Upper Luxury)	566	0	0	0	0	165	2.202	2.933	0,5%
Total	270.954	155.938	6.914	5.391	8.973	4.534	94.405	547.109	100,0%
	49,5%	28,5%	1,3%	1,0%	1,6%	0,8%	17,3%	100,0%	

Değişim	1	2	3	4	5	6	7	Toplam
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV	
A (Mini)		-39,0%				-25,2%		-38,2%
B (Entry)	-39,2%	-38,6%	-28,8%	-57,9%	-46,0%	-35,3%	-30,1%	-38,2%
C (Compact)	-26,0%	-44,7%	-56,0%	-31,9%		-56,2%	-15,3%	-27,2%
D (Medium)	-28,8%	-34,0%	-55,3%	0,0%		-38,7%	-10,9%	-26,8%
E (Luxury)	-38,0%	-100,0%	-31,6%	25,0%		-29,4%	-12,9%	-32,2%
F (Upper Luxury)	-28,3%					18,8%	-16,2%	-16,6%
Total	-29,0%	-40,4%	-37,8%	-35,3%	-39,8%	-42,7%	-17,2%	-30,7%

*S/D: Sedan, H/B: Hatchback, S/W: Station Wagon, MPV: Multi Purpose Vehicle-Çok Amaçlı Araçlar, CDV: Car Derived Van-Binek Tipli Küçük Vanlar, SUV: Sport Utility Vehicle-Arazi Araçlar

At the end of October 2018, 83,6% 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 55,7% has the highest sales volume (211.155) and Segment B follows it with a share of 27,6% (104.656).

At the end of October 2018, when evaluated according to frame type, most preferred body type was again Sedan (50,7%, a quantity of 192.428). Following Sedan passenger cars are Hatchback frame with a share of 24,5% and a sales volume of 92.880 and SUV with a share of 20,6% and total sales volume of 78.179.

At the end of October 2018, automatic transmission passenger car sales numbers, in comparison to the same period in 2017, decreased by 23,94%. Automatic transmission passenger car sale shares at the end of October 2018, in comparison to the same period of the previous year, increased from 59,70% to 65,50% (a number of 248.425).

AUTOMATIC TRANSMISSION	End of October 2017		End of October 2018		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	1.410	78,33%	939	84,37%	-33,40%
B (Entry)	73.602	43,47%	49.660	47,45%	-32,53%
C (Compact)	171.202	59,03%	138.962	65,81%	-18,83%
D (Medium)	60.795	91,63%	45.113	92,83%	-25,79%
E (Luxury)	16.667	99,98%	11.304	99,97%	-32,18%
F (Upper Luxury)	2.933	100,00%	2.447	100,00%	-16,57%
Toplam	326.609	59,70%	248.425	65,50%	-23,94%

At the end of October 2018, when evaluated according to body type, Vans with a share of 68,50% had the highest sales volume (72.445), Light trucks followed them with a share of 12,21% (12.915) while the share of Pick-ups was 10,46% (11.059) and the share of Minibuses was 8,83% (9.334) in light commercial vehicle market.

LIGHT COMMERCIAL VEHICLE BODY TYPE ANALYSIS	End of October 2017		End of October 2018		Change
	Qty	Segment	Qty	Segment	
VAN	120.175	69,87%	72.445	68,50%	-39,72%
LIGHT TRUCK	21.223	12,34%	12.915	12,21%	-39,15%
MINIBUS	15.832	9,21%	9.334	8,83%	-41,04%
PICK-UP	14.756	8,58%	11.059	10,46%	-25,05%
Total	171.986	100,00%	105.753	100,00%	-38,51%