

## PRESS REVIEW

# **Passenger Car and Light Commercial Vehicle Market Showed a Decrease of 52% in the first two months of 2019.**

*Passenger Car Market Decreased By %52, Light Commercial Vehicle Market Decreased By 54%.*

Turkey's passenger car and light commercial vehicle total market decreased by 52.19% in the first two months of 2019 compared to the same period of previous year, to 39,248. In the two-month period of 2018, total market sales figure was 82,085.

Passenger car sales went down by 51.71% in the first two months of 2019, compared to the same period of previous year, to 30,184. In the same period of 2018, the sales were 62,512.

In January-February period of 2019, light commercial vehicle market decreased by 53.69%, in comparison to the year before, to 9,064. In the same period of previous year, the sales were 19,573.

# **Passenger Car and Light Commercial Vehicle Market Showed a Decrease of 47% in February 2019.**

*Passenger Car Market Decreased By 47%, Light Commercial Vehicle Market Decreased By 49%.*

In February 2019, passenger car and light commercial vehicle market decreased to 24,875. In comparison to the total number of 47,009 in February 2018, the sales went down in a ratio of 47.08%.

In February 2019, passenger car sales went down by 46.51% in comparison to the same month of the year before and were 19,205. Last year, the sales were 35,901.

Light commercial vehicle market decreased by 48.96% in February 2019 compared to February 2018, to 5,670. Last year, the sales were 11,108.

By the end of February 2019, a decrease of 52.2% in the sales of passenger cars below 1600cc and a decrease of 51.3% 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 59.7% was observed. 15 electric cars and 659 hybrid passenger cars were sold in the first two months of 2019.

When the average emission values of the passenger car market in the end of February 2019 are considered, the passenger cars between 100-120g/km took the largest share with a ratio of 34.31%, with a number of 10,356.

In the end of February 2019, diesel passenger car sales share decreased to 53.42% while the automatic transmission passenger car sales share decreased to 65.86%.

In the end of February 2019, 82.4% 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 58.5% reached the highest sales volume (17,672). When evaluated according to frame, most preferred body type was again Sedan (49.9%, a quantity of 15,060).

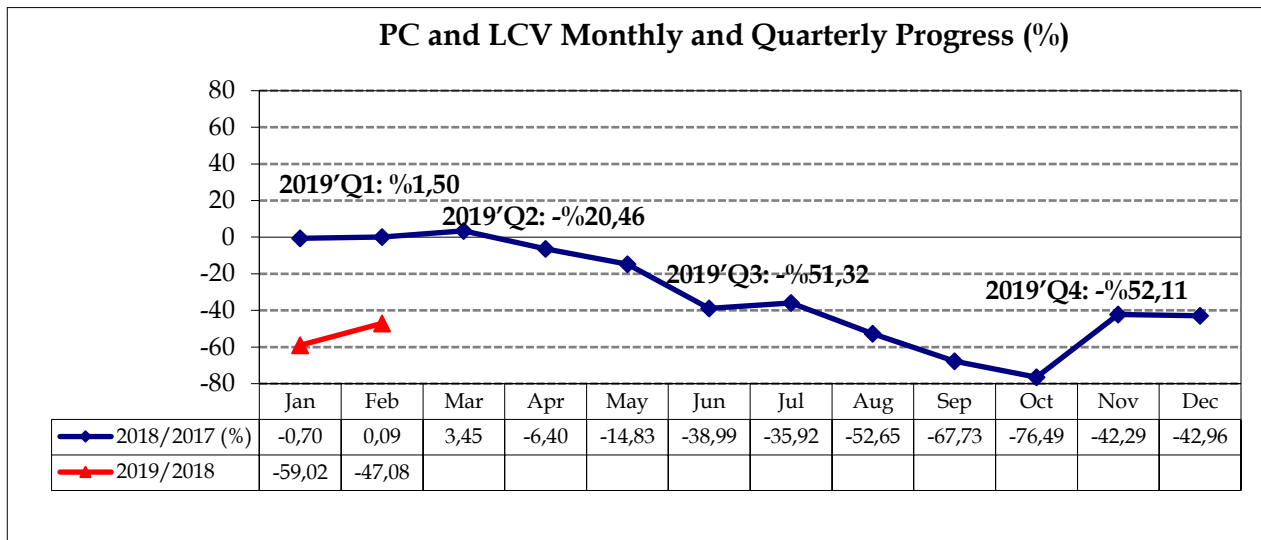
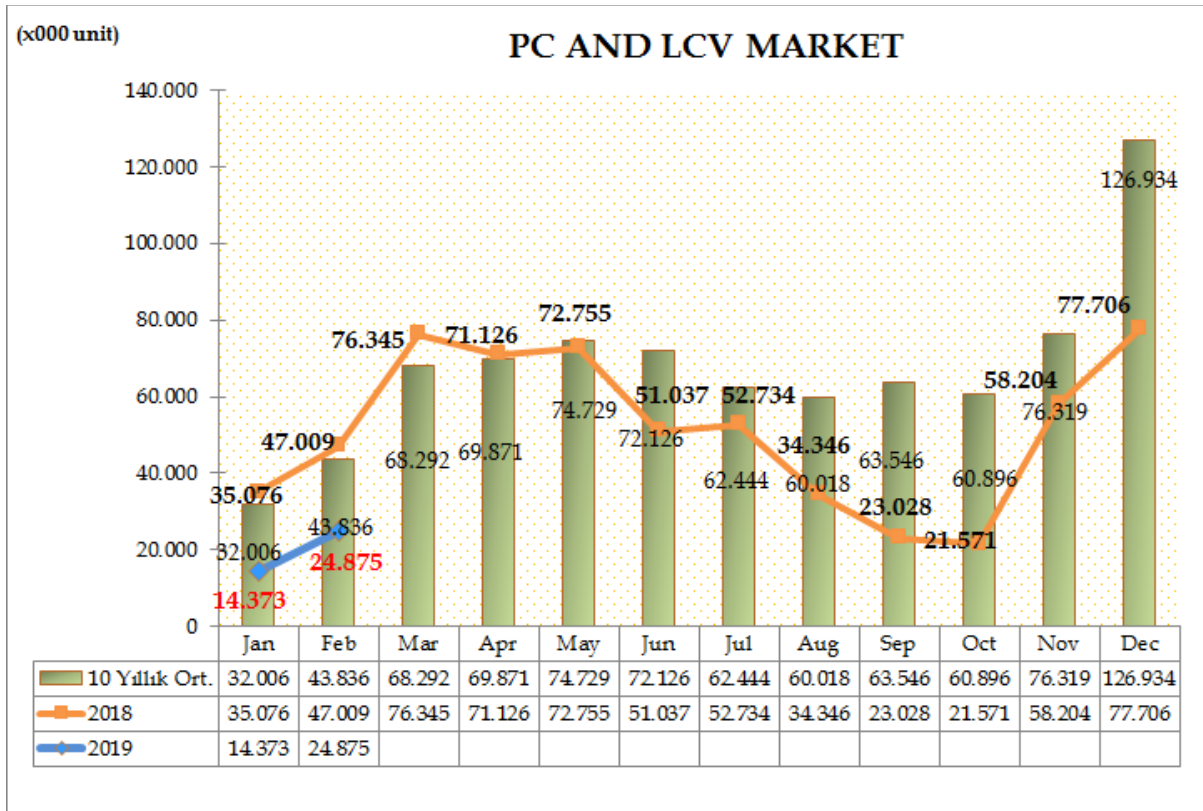
In the end of February 2019, when evaluated according to body type, vans with a share of 70.09% had the highest sales volume (6,353), light trucks followed them with a share of 12.43% (1,127) while the share of minibuses was 8.75% (793) and the share of pick-ups was 8.73% (791) in light commercial vehicle market.

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In the first two months of 2019, Turkey's passenger car and light commercial vehicle total market presented a sales number of 39,248. In comparison to the total number of 82,085, the sales went down in a ratio of 52.19%.

In February 2019, passenger car and light commercial vehicle market presented a sales number of 24,875. In comparison to the total number of 47,009 in February 2018, the sales went down in a ratio of 47.08%.

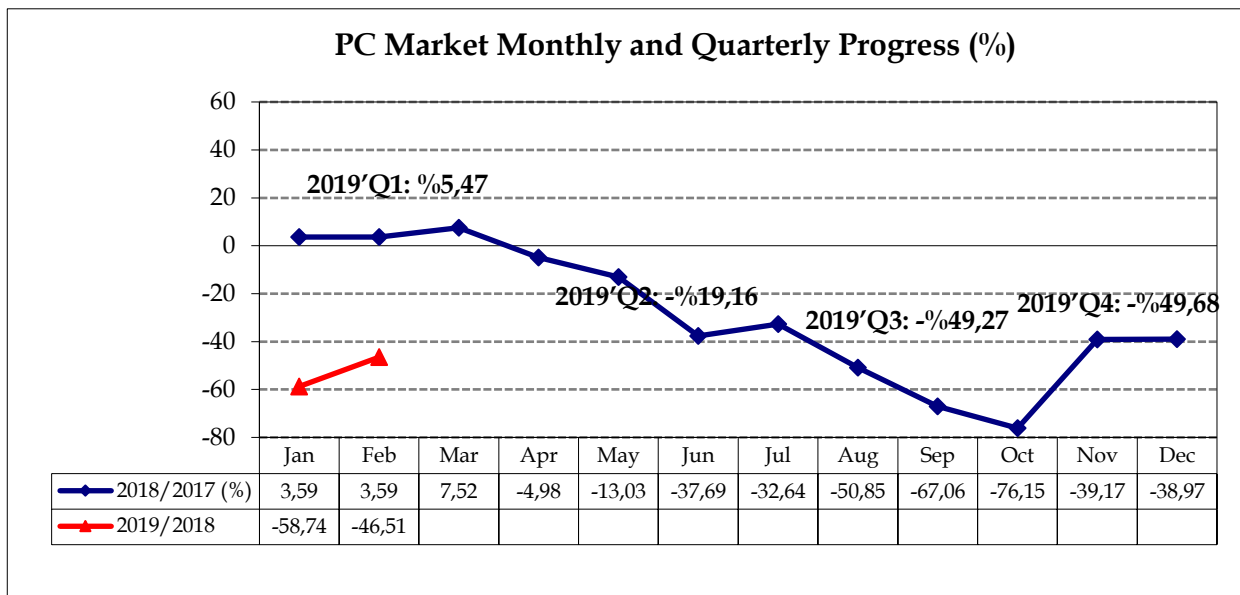
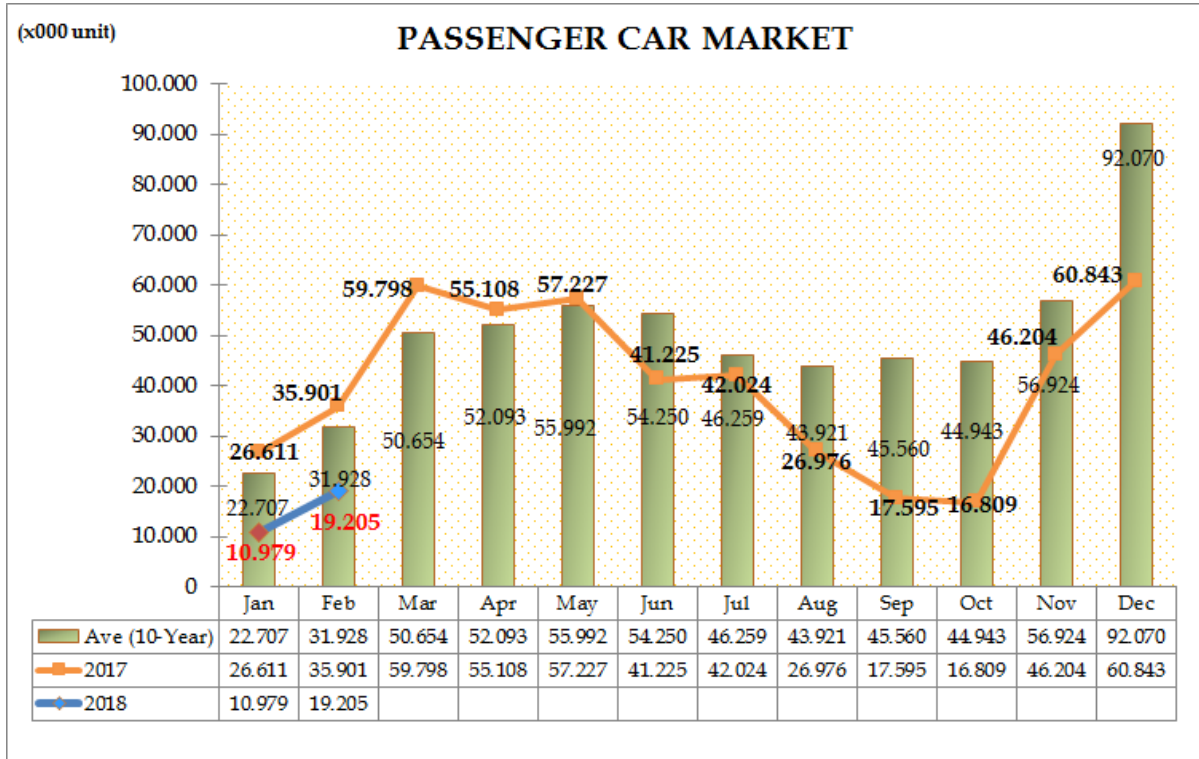
The passenger car and light commercial vehicle market, in comparison to the average 10-year February sales, showed a decrease of 43.25%.



In the first two months of 2019, passenger car sales went down by 51.71% in comparison to the same period of previous year and were 30,184. In the same period of previous year, the sales were 62,512.

In February 2019, passenger car sales went down by 46.51% in comparison to the same month of the year before and were 19,205. In February 2018, the sales were 35,901.

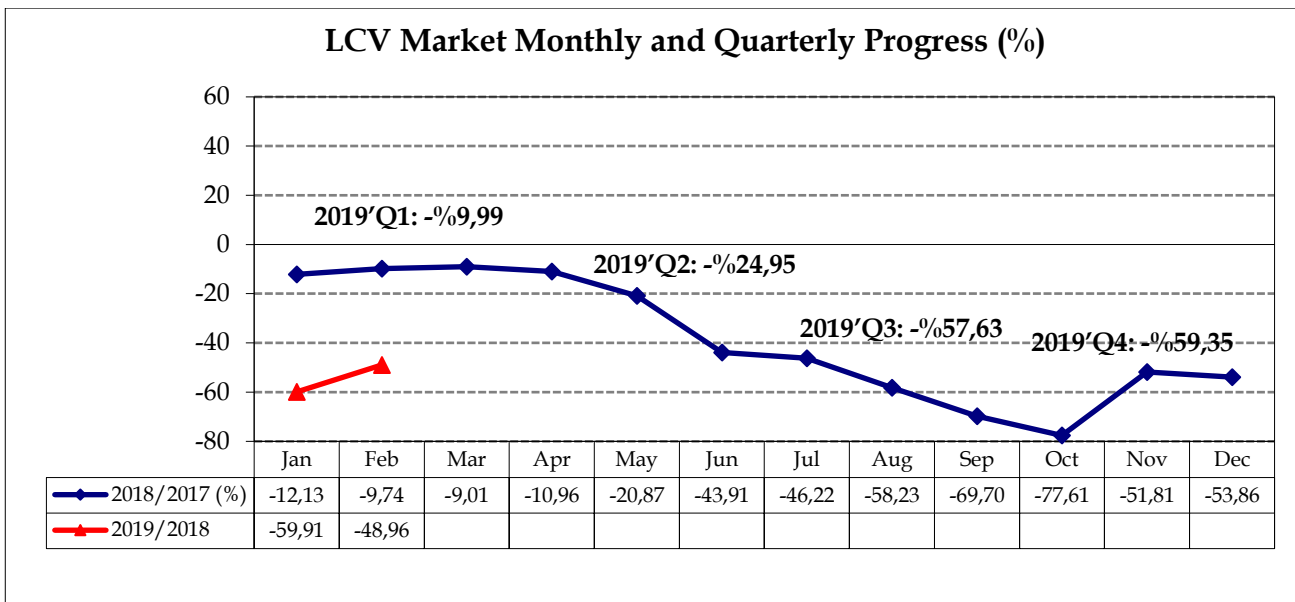
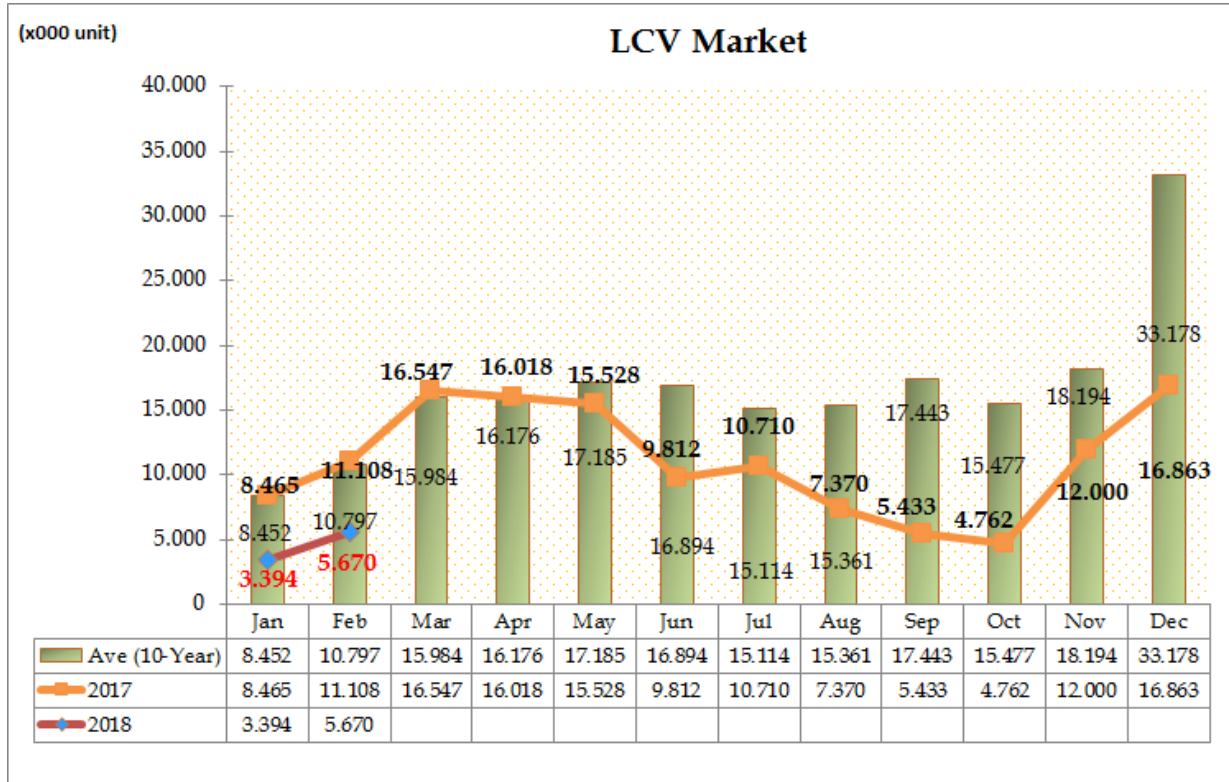
The passenger car market, in comparison to the average 10-year February sales, showed an decrease of 39.85%.



In January-February period of 2019, light commercial vehicle sales decreased by 53.69% in comparison to the same period of the last year, to 9,064. In the same period of previous year, the sales were 19,573.

In February 2019, light commercial vehicle sales decreased by 48.96% in comparison to the same month of previous year, to 5,670. In February 2018, the sales were 11,108.

The light commercial vehicle market, in comparison to the average 10-year February sales, showed a decrease of 47.49%.



When the end of February 2019 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 94.41% and a number of 28,496. Passenger cars between 1600cc to 2000cc followed them with a ratio of 3.02% and passenger cars above 2000cc with a ratio of 0.34%. In comparison with the same period of 2018, a decrease of 52.2% in the sales of passenger cars below 1600cc and a decrease of 51.3% 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 59.7% was observed. 7 electric cars below 85kW engine power and 8 electric cars above 121kW engine power were sold. 15 electric cars in total were sold at the end of February 2019.

At the end of February 2019, 29 hybrid cars under 1600cc, 601 hybrid cars between 1601cc - 1800cc (>50kW), 11 hybrid cars between 1801cc - 2000cc, 17 hybrid cars between 2001cc - 2500cc (>100KW) and 1 hybrid car above 2500cc were sold. 659 hybrid cars were sold in January-February period of 2019.

ENGINE VOLUME	ENGINE TYPE	End of February 2019		End of February 2019		Change	SCT %	VAT %
		Qty	Segment	Qty	Segment			
≤ 1600cc	B/D	59.561	95,28%	28.496	94,41%	-52,2%	30, 35, 60	
1601cc - ≤ 2000cc	B/D	1.873	3,00%	912	3,02%	-51,3%	100, 110	
≥ 2001cc	B/D	253	0,40%	102	0,34%	-59,7%	160	
≤ 85 kW	ELECTRIC	10	0,02%	7	0,02%	-30,0%	3	
86kW - ≤ 120kW	ELECTRIC	0	0,00%	0	0,00%		7	
≥ 121kW	ELECTRIC	2	0,00%	8	0,03%	300,0%	15	
<=1600cc	HYBRID	96	0,15%	29	0,10%	-69,8%	60	
1601cc - <=1800cc (<=50KW)	HYBRID	0	0,00%	0	0,00%		110	18
1601cc - <=1800cc (>50KW)	HYBRID	699	1,12%	601	1,99%	-14,0%	60	
1801cc - <=2000cc	HYBRID	2	0,00%	11	0,04%	450,0%	110	
2001cc - <=2500cc (<=100KW)	HYBRID	0	0,00%	0	0,00%		160	
2001cc - <=2500cc (>100KW)	HYBRID	15	0,02%	17	0,06%	13,3%	110	
>2500cc	HYBRID	1	0,00%	1	0,00%	0,0%	160	
<b>Total</b>		<b>62.512</b>	<b>100,00%</b>	<b>30.184</b>	<b>100,00%</b>	<b>-51,7%</b>	<b>TAX RATES</b>	



When the end of February 2019 passenger car market is studied in terms of average emission values, passenger cars between 100-120 gr/km have the highest share of 34.31% (10,356) and following this, passenger cars between 120-140 gr/km have a share of 30.57% (9,228).

CO2 AVERAGE EMISSION VALUES (gr/km)	End of February 2019		End of February 2019		Change
	Qty	Segment	Qty	Segment	
< 100 gr/km	12.113	19,38%	4.959	16,43%	-59,06%
≥ 100 - < 120 gr/km	25.208	40,33%	10.356	34,31%	-58,92%
≥ 120 - < 140 gr/km	14.199	22,71%	9.228	30,57%	-35,01%
≥ 140 - < 160 gr/km	8.902	14,24%	4.258	14,11%	-52,17%
≥ 160 gr/km	2.090	3,34%	1.383	4,58%	-33,83%
<b>Total</b>	<b>62.512</b>	<b>100,00%</b>	<b>30.184</b>	<b>100,00%</b>	<b>-51,71%</b>

When the end of February 2019 passenger car market is studied in terms of engine type, diesel car sales have the highest share of 53.42% (16,123), petrol car share comes second with a share of 40.60% (12,254), autogas car share is 3.75%, hybrid car share is 2.18% and electric car share is 0.05%.

ENGINE TYPE	End of February 2018		End of February 2019		Change
	Qty	Segment	Qty	Segment	
<b>Petrol</b>	22.782	36,44%	12.254	40,60%	-46,21%
<b>Hybrid</b>	813	1,30%	659	2,18%	-18,94%
<b>Diesel</b>	36.977	59,15%	16.123	53,42%	-56,40%
<b>Electric</b>	12	0,02%	15	0,05%	25,00%
<b>Autogas</b>	1.928	3,08%	1.133	3,75%	-41,23%
<b>Total</b>	<b>62.512</b>	<b>100,00%</b>	<b>30.184</b>	<b>100,00%</b>	<b>-51,71%</b>

End of February 2019	1	2	3	4	5	6	7	Total	Share
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	78	0	0	0	8	0	86	0,3%
B (Entry)	995	4.474	323	28	297	12	993	7.122	23,6%
C (Compact)	10.319	1.953	41	164	53	33	5.109	17.672	58,5%
D (Medium)	3.289	178	6	1	0	116	856	4.446	14,7%
E (Luxury)	428	0	6	0	0	18	247	699	2,3%
F (Upper Luxury)	29	0	0	0	0	20	110	159	0,5%
<b>Total</b>	<b>15.060</b>	<b>6.683</b>	<b>376</b>	<b>193</b>	<b>350</b>	<b>207</b>	<b>7.315</b>	<b>30.184</b>	<b>100,0%</b>
	49,9%	22,1%	1,2%	0,6%	1,2%	0,7%	24,2%	100,0%	

End of February 2019	1	2	3	4	5	6	7	Toplam	Pay
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	240	0	0	0	6	0	246	0,4%
B (Entry)	3.876	8.754	616	60	985	8	1.455	15.754	25,2%
C (Compact)	22.461	5.229	155	759	54	200	7.320	36.178	57,9%
D (Medium)	5.635	686	34	2	0	203	1.497	8.057	12,9%
E (Luxury)	1.206	0	6	0	0	59	487	1.758	2,8%
F (Upper Luxury)	66	0	0	0	0	23	430	519	0,8%
<b>Total</b>	<b>33.244</b>	<b>14.909</b>	<b>811</b>	<b>821</b>	<b>1.039</b>	<b>499</b>	<b>11.189</b>	<b>62.512</b>	<b>100,0%</b>
	53,2%	23,8%	1,3%	1,3%	1,7%	0,8%	17,9%	100,0%	

Değişim	1	2	3	4	5	6	7	Toplam
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV	
A (Mini)		-67,5%				33,3%		-65,0%
B (Entry)	-74,3%	-48,9%	-47,6%	-53,3%	-69,8%	50,0%	-31,8%	-54,8%
C (Compact)	-54,1%	-62,7%	-73,5%	-78,4%		-83,5%	-30,2%	-51,2%
D (Medium)	-41,6%	-74,1%	-82,4%	-50,0%		-42,9%	-42,8%	-44,8%
E (Luxury)	-64,5%	#SAYI/0!	0,0%	#SAYI/0!		-69,5%	-49,3%	-60,2%
F (Upper Luxury)	-56,1%	-67,5%				-13,0%	-74,4%	-69,4%
<b>Total</b>	<b>-54,7%</b>	<b>-55,2%</b>	<b>-53,6%</b>	<b>-76,5%</b>	<b>-66,3%</b>	<b>-58,5%</b>	<b>-34,6%</b>	<b>-51,7%</b>

\*S/D: Sedan, H/B: Hatchback, S/W: Station Wagon, MPV: Multi Purpose Vehicle, CDV: Car Derived Van,, SUV: Sport Utility Vehicle

At the end of February 2019, 82.4% 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 58.5% has the highest sales volume (17,672) and Segment B follows it with a share of 23.6% (7,122).

At the end of February 2019, when evaluated according to frame type, most preferred body type was Sedan again (49.9%, a quantity of 15,060). Following Sedan passenger cars are SUV frame with a share of 24.2% and a sales volume of 7,315 and Hatchback with a share of 22.1% and total sales volume of 6,683.



At the end of February 2019, automatic transmission passenger car sales numbers, in comparison to the same period in 2018, decreased by 52.30%. Automatic transmission passenger car sale shares at the end of February 2019, in comparison to the same period of the previous year, decreased from 66.66% to 65.86% (a number of 19,878).

AUTOMATIC TRANSMISSION	End of February 2019		End of February 2019		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	215	87,40%	67	77,91%	-68,84%
B (Entry)	7.212	45,78%	3.707	52,05%	-48,60%
C (Compact)	24.631	68,08%	11.217	63,47%	-54,46%
D (Medium)	7.334	91,03%	4.029	90,62%	-45,06%
E (Luxury)	1.758	100,00%	699	100,00%	-60,24%
F (Upper Luxury)	519	100,00%	159	100,00%	-69,36%
<b>Toplam</b>	<b>41.669</b>	<b>66,66%</b>	<b>19.878</b>	<b>65,86%</b>	<b>-52,30%</b>

In the end of February 2019, when evaluated according to body type, vans with a share of 70.09% had the highest sales volume (6,353), light trucks followed them with a share of 12.43% (1,127) while the share of Minibuses was 8.75% (793) and the share of pick-ups was 8.73% (791) in light commercial vehicle market.

LIGHT COMMERCIAL VEHICLE BODY TYPE ANALYSIS	End of February 2019		End of February 2019		Change
	Qty	Segment	Qty	Segment	
VAN	13.518	69,06%	6.353	70,09%	-53,00%
LIGHT TRUCK	2.388	12,20%	1.127	12,43%	-52,81%
MINIBUS	1.722	8,80%	793	8,75%	-53,95%
PICK-UP	1.945	9,94%	791	8,73%	-59,33%
<b>Total</b>	<b>19.573</b>	<b>100,00%</b>	<b>9.064</b>	<b>100,00%</b>	<b>-53,69%</b>