

PRESS REVIEW

Passenger Car and Light Commercial Vehicle Market Showed a Decrease of 32% in the ten months of 2019.

Passenger Car Market Decreased By %29, Light Commercial Vehicle Market Decreased By 42%.

Turkey's passenger car and light commercial vehicle total market decreased by 31.88% in the first ten months of 2019 compared to the same period of previous year, to 330,384. In 2018, total market sales figure was 485,027.

Passenger car sales went down by 29.17% in the first ten months of 2019, compared to the same period of previous year, to 268,624. In 2018, the sales were 379,274.

In January-October 2019, light commercial vehicle market decreased by 41.6%, in comparison to previous year, to 61,760. In 2018, the sales were 105,753.

Passenger Car and Light Commercial Vehicle Market Showed an Increase of 127.5% in October 2019.

Passenger Car Market Increased By 138%, Light Commercial Vehicle Market Increased By 91%.

In October 2019, passenger car and light commercial vehicle market increased to 49,075. In comparison to the total number of 21,571 in October 2018, the sales went up in a ratio of 127.5%.

In October 2019, passenger car sales went up by 137.94% in comparison to the same month of the year before and were 39,996. Last year, the sales were 16,809.

Light commercial vehicle market increased by 90.66% in October 2019 compared to October 2018, to 9,079. Last year, the sales were 4,762.

By the end of October 2019, a decrease of 30.6% in the sales of passenger cars below 1600cc and a decrease of 39.2% 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 29.4% was observed. 153 electric cars and 8.688 hybrid passenger cars were sold in the first ten months of 2019.

When the average emission values of the passenger car market in the end of October 2019 are considered, the passenger cars between 100-120g/km took the largest share with a ratio of 39.3%, with a number of 105,571.

By the end of October 2019, diesel passenger car sales share decreased to 54.74% while the automatic transmission passenger car sales share was 68.58%.

By the end of October 2019, 85.8% 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 61.5% reached the highest sales volume (165,274). When evaluated according to frame, most preferred body type was again Sedan (50.4%, a quantity of 135,353).

By the end of October 2019, when evaluated according to body type, vans with a share of 72.08% had the highest sales volume (44,518), light trucks followed them with a share of 12.17% (7,517) while the share of minibuses was 8.04% (4,967) and the share of pick-ups was 7.70% (4,758) in light commercial vehicle market.

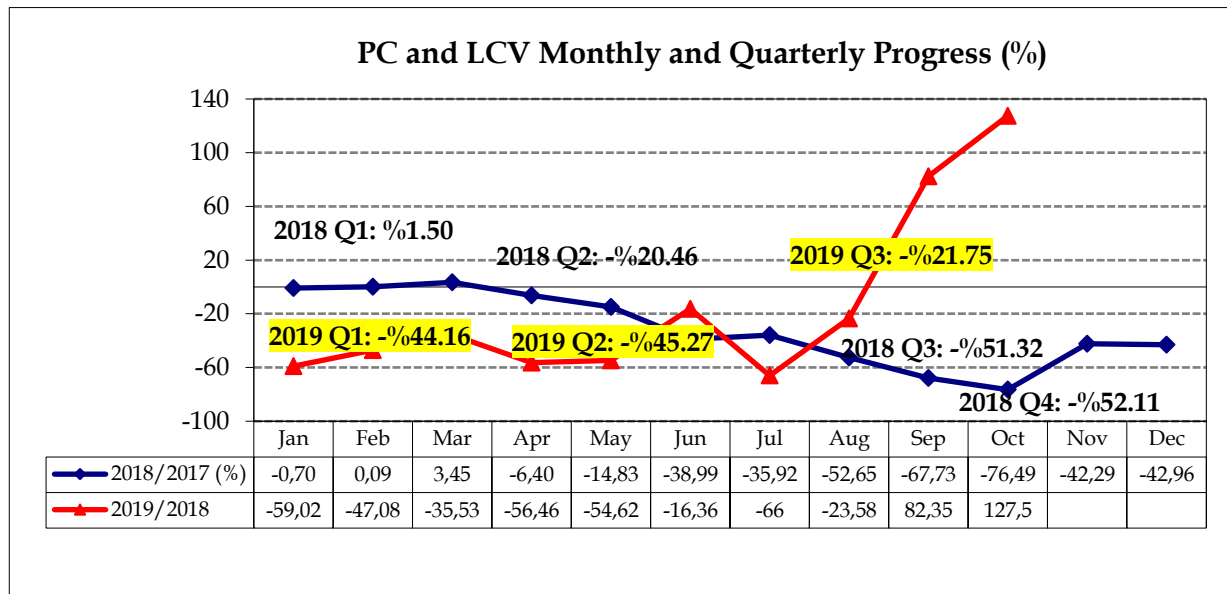
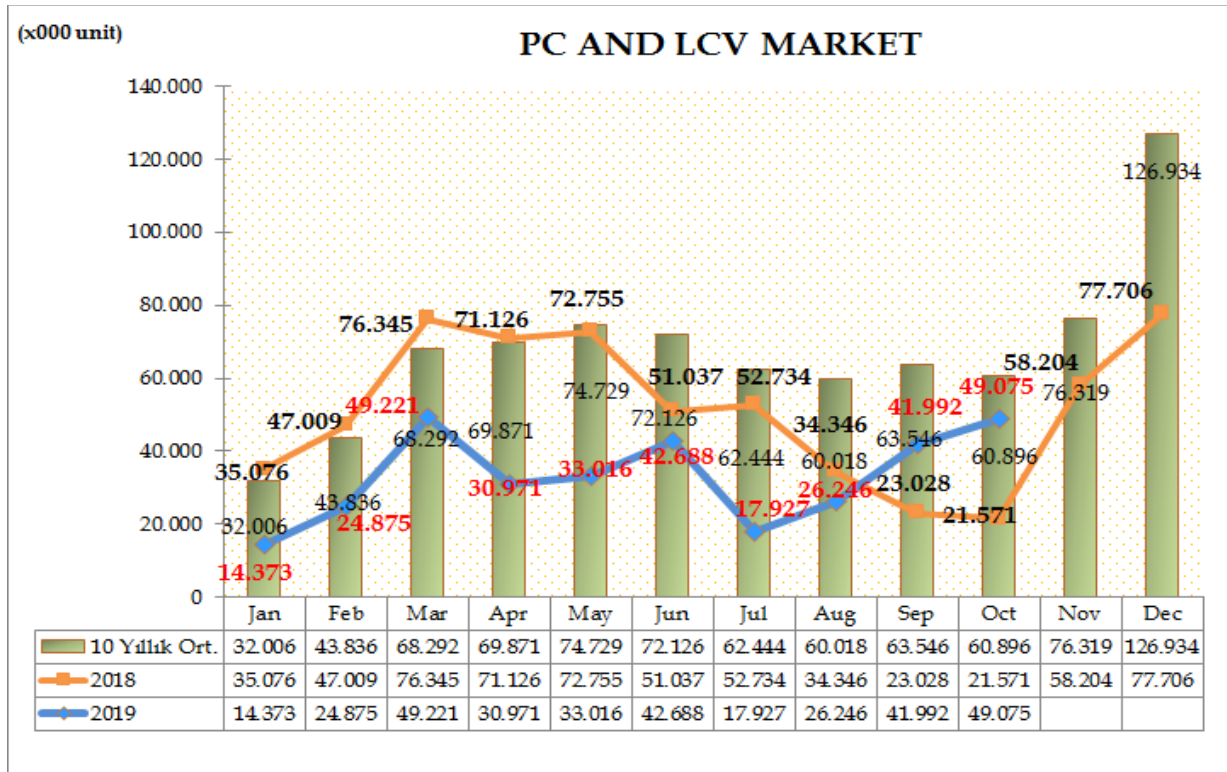
The total automotive market in 2019 is estimated to be between **450,000 - 500,000** and the total automotive market in 2020 is forecasted to be between **525,000 - 575,000**.

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In the first ten months of 2019, Turkey's passenger car and light commercial vehicle total market presented a sales number of 330,384. In comparison to the total number of 485,027 in 2018, the sales went down in a ratio of 31.88%.

In October 2019, passenger car and light commercial vehicle market presented a sales number of 49,075. In comparison to the total number of 21,571 in October 2018, the sales went up in a ratio of 127.5%.

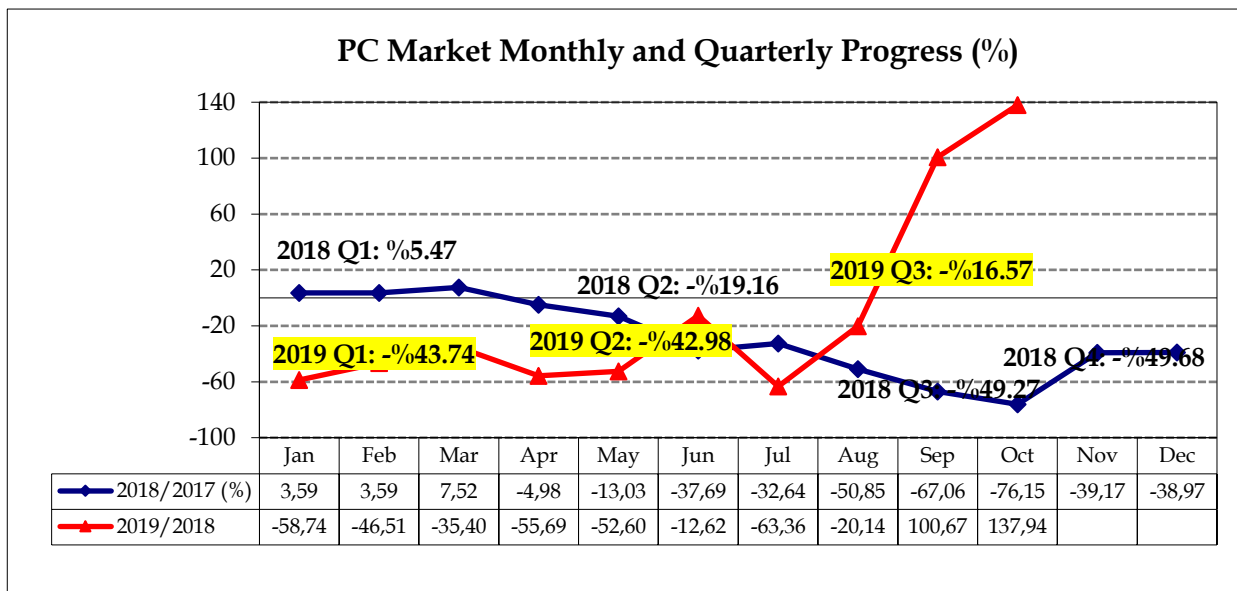
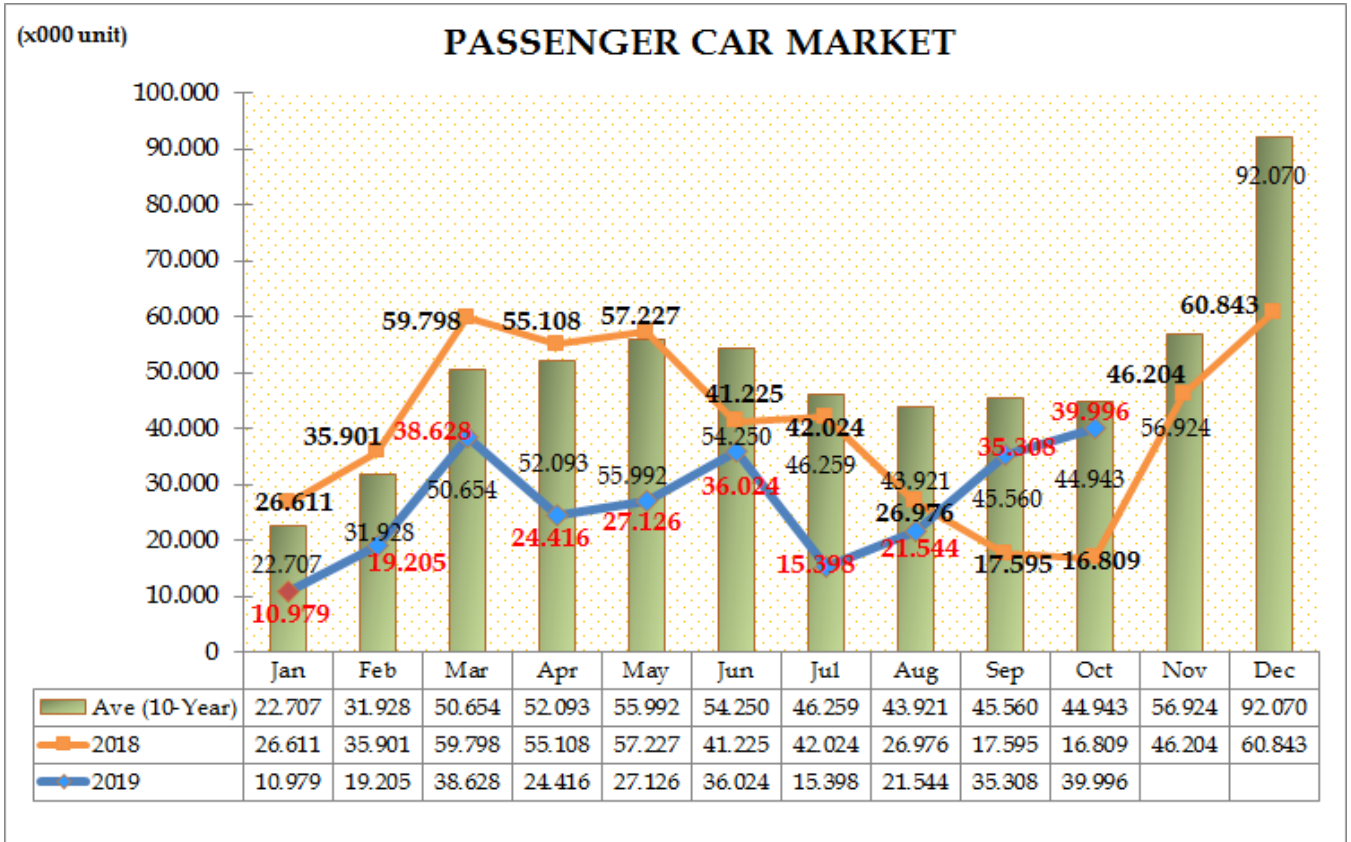
The passenger car and light commercial vehicle market, in comparison to the average 10-year October sales, showed a decrease of 19.41%.



In the first ten months of 2019, passenger car sales went down by 29.17% in comparison to the same period of previous year and were 268,624. In 2018, the sales were 379,274.

In October 2019, passenger car sales went up by 137.94% in comparison to October 2018 and were 39,996. In October 2018, the sales were 16,809.

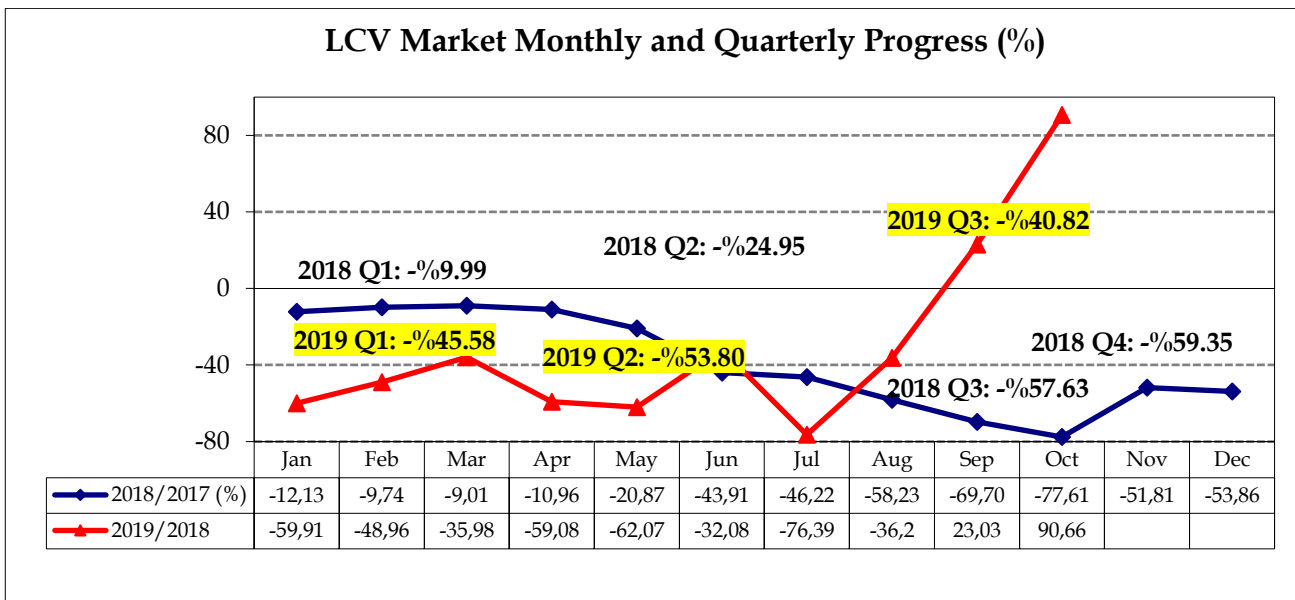
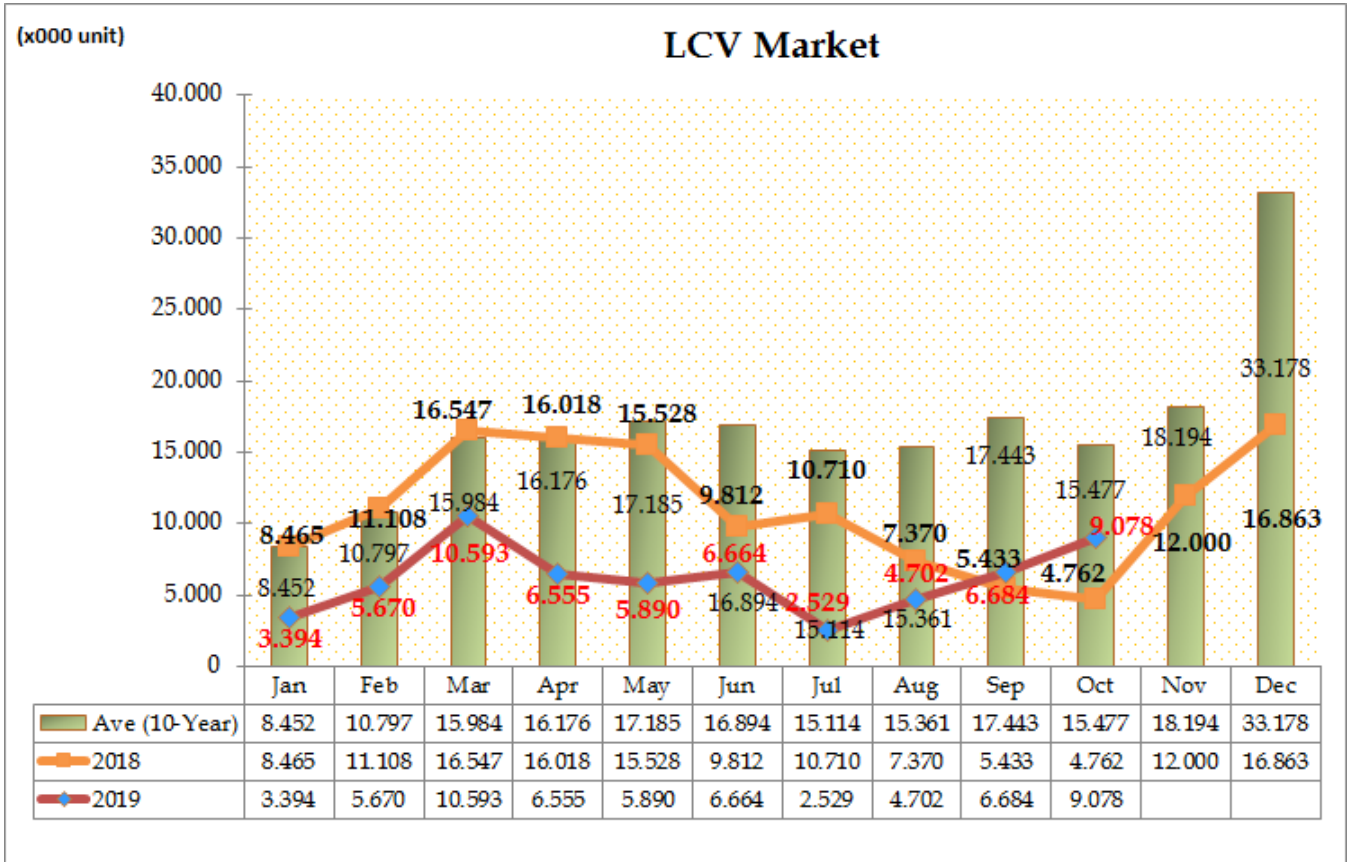
The passenger car market, in comparison to the average 10-year October sales, showed a decrease of 11.01%.



In January-October 2019, light commercial vehicle sales decreased by 41.6% in comparison to the same period of the last year, to 61,760. In 2018, the sales were 105,753.

In October 2019, light commercial vehicle sales increased by 90.66% in comparison to the same month of previous year, to 9,079. In October 2018, the sales were 4,762.

The light commercial vehicle market, in comparison to the average 10-year October sales, showed a decrease of 41.34%.



When the end of October 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 93.91% and a quantity of 252,260. Passenger cars between 1600cc to 2000cc followed them with a ratio of 2.50% and passenger cars above 2000cc with a ratio of 0.30%. In comparison with the same period of 2018, a decrease of 30.6% in the sales of passenger cars below 1600cc and a decrease of 39.2% 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 29.4% was observed. 35 electric cars below 85kW engine power and 118 electric cars above 121kW engine power were sold. 153 electric cars in total were sold by the end of October 2019.

By the end of October 2019, 82 hybrid cars under 1600cc, 7,707 hybrid cars between 1601cc-1800cc (>50kW), 622 hybrid cars between 1801cc-2000cc, 160 hybrid cars between 2001cc-2500cc (>100KW), 115 hybrid cars between 2001cc-2500cc (<=100KW) and 2 hybrid cars above 2500cc were sold. 8,688 hybrid cars were sold in January-October 2019.

ENGINE VOLUME	ENGINE TYPE	End of October 2019		End of October 2019		Change	SCT %	VAT %
		Qty	Segment	Qty	Segment			
≤ 1600cc	B/D	363.635	95,88%	252.260	93,91%	-30,6%	45, 50, 60	
1601cc - ≤ 2000cc	B/D	11.038	2,91%	6.714	2,50%	-39,2%	100, 110	
≥ 2001cc	B/D	1.146	0,30%	809	0,30%	-29,4%	160	
≤ 85 kW	ELECTRIC	76	0,02%	35	0,01%	-53,9%	3	
86kW - ≤ 120kW	ELECTRIC	0	0,00%	0	0,00%		7	
≥ 121kW	ELECTRIC	48	0,01%	118	0,04%	145,8%	15	
<=1600cc	HYBRID	470	0,12%	82	0,03%	-82,6%	45, 50, 60	
1601cc - <=1800cc (<=50KW)	HYBRID	0	0,00%	0	0,00%		110	18
1601cc - <=1800cc (>50KW)	HYBRID	2.605	0,69%	7.707	2,87%	195,9%	45, 50, 60	
1801cc - <=2000cc	HYBRID	30	0,01%	622	0,23%	1973,3%	110	
2001cc - <=2500cc (<=100KW)	HYBRID	0	0,00%	160	0,06%		160	
2001cc - <=2500cc (>100KW)	HYBRID	220	0,06%	115	0,04%	-47,7%	110	
>2500cc	HYBRID	6	0,00%	2	0,00%	-66,7%	160	
Total		379.274	100,00%	268.624	100,00%	-29,2%	TAX RATES	

When the end of October 2019 passenger car market is studied in terms of average emission values, passenger cars between 100-120 gr/km have the highest share of 39.30% (105,571) and following this, passenger cars between 120-140 gr/km have a share of 26.94% (72,371).

CO2 AVERAGE EMISSION VALUES (gr/km)	End of October 2018		End of October 2019		Change
	Qty	Segment	Qty	Segment	
< 100 gr/km	68.403	18,04%	42.643	15,87%	-37,66%
≥ 100 - < 120 gr/km	153.374	40,44%	105.571	39,30%	-31,17%
≥ 120 - < 140 gr/km	82.978	21,88%	72.371	26,94%	-12,78%
≥ 140 - < 160 gr/km	62.216	16,40%	41.166	15,32%	-33,83%
≥ 160 gr/km	12.303	3,24%	6.873	2,56%	-44,14%
Total	379.274	100,00%	268.624	100,00%	-29,17%

When the end of October 2019 passenger car market is studied in terms of engine type, diesel car sales have the highest share of 54.74% (147,041), petrol car share comes second with a share of 37.61% (101,026), autogas car share is 4.36%, hybrid car share is 3.23% and electric car share is 0.06%.

ENGINE TYPE	End of October 2018		End of October 2019		Change
	Qty	Segment	Qty	Segment	
Diesel	223.539	58,94%	147.041	54,74%	-34,22%
Petrol	139.369	36,75%	101.026	37,61%	-27,51%
Autogas	12.911	3,40%	11.716	4,36%	-9,26%
Hybrid	3.331	0,88%	8.688	3,23%	160,82%
Electric	124	0,03%	153	0,06%	23,39%
Total	379.274	100,00%	268.624	100,00%	-29,17%

End of October 2019	1	2	3	4	5	6	7	Total	Share
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	663	0	0	0	48	0	711	0,3%
B (Entry)	9.734	39.074	3.435	421	2.395	42	9.397	64.498	24,0%
C (Compact)	98.659	19.455	439	1.553	370	588	44.210	165.274	61,5%
D (Medium)	22.086	1.140	67	21	0	561	5.328	29.203	10,9%
E (Luxury)	4.619	0	74	1	0	209	1.850	6.753	2,5%
F (Upper Luxury)	255	0	0	0	0	167	1.763	2.185	0,8%
Total	135.353	60.332	4.015	1.996	2.765	1.615	62.548	268.624	100,0%
	50,4%	22,5%	1,5%	0,7%	1,0%	0,6%	23,3%	100,0%	

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	1.046	0	0	0	67	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	9.294	48.488	12,8%
E (Luxury)	7.720	0	26	5	0	332	3.332	11.415	3,0%
F (Upper Luxury)	406	0	0	0	0	196	1.845	2.447	0,6%
Total	192.428	92.890	4.298	3.488	5.405	2.586	78.179	379.274	100,0%
	50,7%	24,5%	1,1%	0,9%	1,4%	0,7%	20,6%	100,0%	

Change	1	2	3	4	5	6	7	Total
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV	
A (Mini)		-36,6%				-28,4%		-36,1%
B (Entry)	-58,6%	-36,8%	5,7%	32,4%	-50,5%	-62,5%	-13,3%	-38,4%
C (Compact)	-21,4%	-29,3%	-41,8%	-50,4%	-34,2%	-31,5%	-16,4%	-21,7%
D (Medium)	-37,5%	-55,0%	-75,1%	-32,3%		-45,1%	-42,7%	-39,8%
E (Luxury)	-40,2%		184,6%	-80,0%		-37,0%	-44,5%	-40,8%
F (Upper Luxury)	-37,2%					-14,8%	-4,4%	-10,7%
Total	-29,7%	-35,1%	-6,6%	-42,8%	-48,8%	-37,5%	-20,0%	-29,2%

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

By the end of October 2019, 85.8% 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 61.5% has the highest sales volume (165,274) and Segment B follows it with a share of 24.0% (64,498).

By the end of October 2019, when evaluated according to frame type, most preferred body type was sedan again (50.4%, a quantity of 135,353). Following sedan passenger cars are SUV frame with a share of 23.3% and with a sales volume of 62,548, then hatchback with a share of 22.5% and with a total sales volume of 60,332.

By the end of October 2019, automatic transmission passenger car sales numbers, in comparison to the same period in 2018, decreased by 25.88%. Automatic transmission passenger car sale shares at the end of October 2019, in comparison to the same period of the previous year, decreased from 65.53% to 68.58% (a number of 184,215).

AUTOMATIC TRANSMISSION	End of October 2018		End of October 2019		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	939	84,37%	603	84,81%	-35,78%
B (Entry)	49.660	47,45%	33.543	52,01%	-32,45%
C (Compact)	139.085	65,87%	112.908	68,32%	-18,82%
D (Medium)	45.005	92,82%	28.224	96,65%	-37,29%
E (Luxury)	11.412	99,97%	6.752	99,99%	-40,83%
F (Upper Luxury)	2.447	100,00%	2.185	100,00%	-10,71%
Total	248.548	65,53%	184.215	68,58%	-25,88%

By the end of October 2019, when evaluated according to body type, vans with a share of 72.08% had the highest sales volume (44,518), light trucks followed them with a share of 12.17% (7,517) while the share of minibuses was 8.04% (4,967) and the share of pick-ups was 7.70% (4,758) in light commercial vehicle market.

LIGHT COMMERCIAL VEHICLE BODY TYPE ANALYSIS	End of October 2018		End of October 2019		Change
	Qty	Segment	Qty	Segment	
VAN	72.445	68,50%	44.518	72,08%	-38,55%
LIGHT TRUCK	12.915	12,21%	7.517	12,17%	-41,80%
MINIBUS	9.334	8,83%	4.967	8,04%	-46,79%
PICK-UP	11.059	10,46%	4.758	7,70%	-56,98%
Total	105.753	100,00%	61.760	100,00%	-41,60%