

PRESS REVIEW

Passenger Car and Light Commercial Vehicle Market Showed an Increase of 41% in the first quarter of 2020.

Passenger Car Market Increased By %45, Light Commercial Vehicle Market Increased By 26%.

Turkey's passenger car and light commercial vehicle total market increased by 40,62% in the first quarter of 2020 compared to the same period of previous year, to 124.403. In the first quarter of 2019, total market sales figure was 88.469.

Passenger car sales went up by 44,79% in the first quarter of 2020, compared to the same period of previous year, to 99.630. In the same period of 2019, the sales were 68.812.

In January-March period of 2020, light commercial vehicle market increased by 26,03%, in comparison to previous year, to 24.773. In the same period of previous year, the sales were 19.657.

Passenger Car and Light Commercial Vehicle Market Showed an Increase of 1,6% in March 2020.

Passenger Car Market Increased By 3%, Light Commercial Vehicle Market Decreased By 4%.

In March 2020, passenger car and light commercial vehicle market decreased to 50.008. In comparison to the total number of 49.221 in March 2019, the sales went up in a ratio of 1,6%.

In March 2020, passenger car sales went up by 3,26% in comparison to the same month of the year before and were 39.887. Last year, the sales were 38.628.

Light commercial vehicle market decreased by 4,46% in March 2020 compared to March 2019, to 10.121. Last year, the sales were 10.593.

By the end of March 2020, an increase of 45,1% in the sales of passenger cars below 1600cc and a decrease of 8,4% 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 29,8% was observed. 107 electric cars and 3.503 hybrid passenger cars were sold in the first quarter of 2020.

When the average emission values of the passenger car market in the end of March 2020 are considered, the passenger cars between 100-120g/km took the largest share with a ratio of 41,56%, with a number of 41,408.

By the end of March 2020, diesel passenger car sales share decreased to 44,86% while the automatic transmission passenger car sales share increased to 71,51%.

By the end of March 2020, 83,4% 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 61,3% reached the highest sales volume (61.055). When evaluated according to frame, most preferred body type was again Sedan (47,9%, a quantity of 47.709).

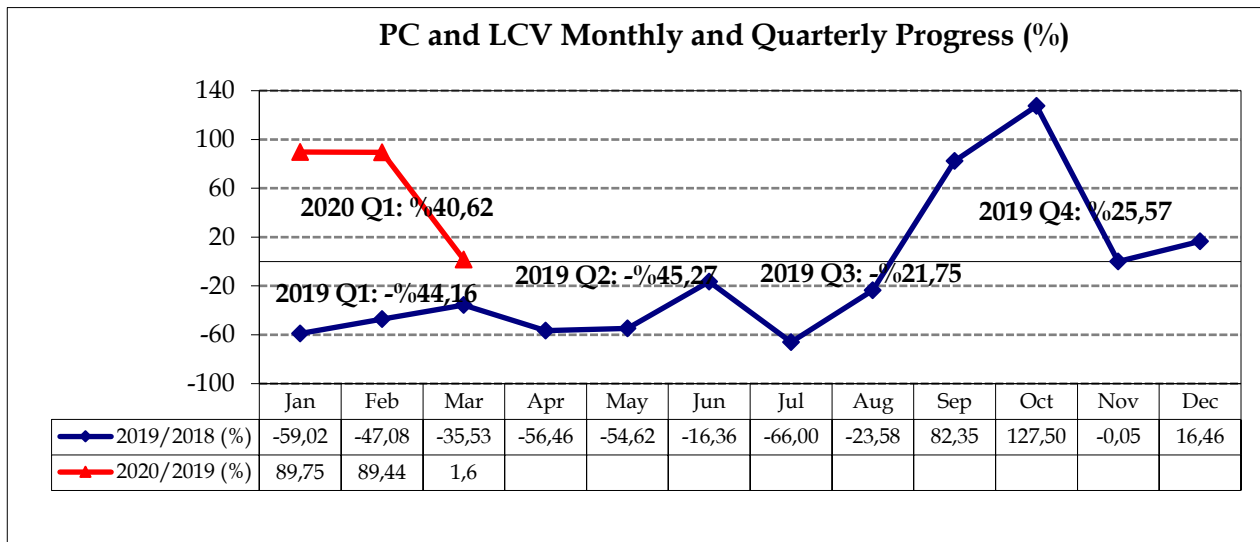
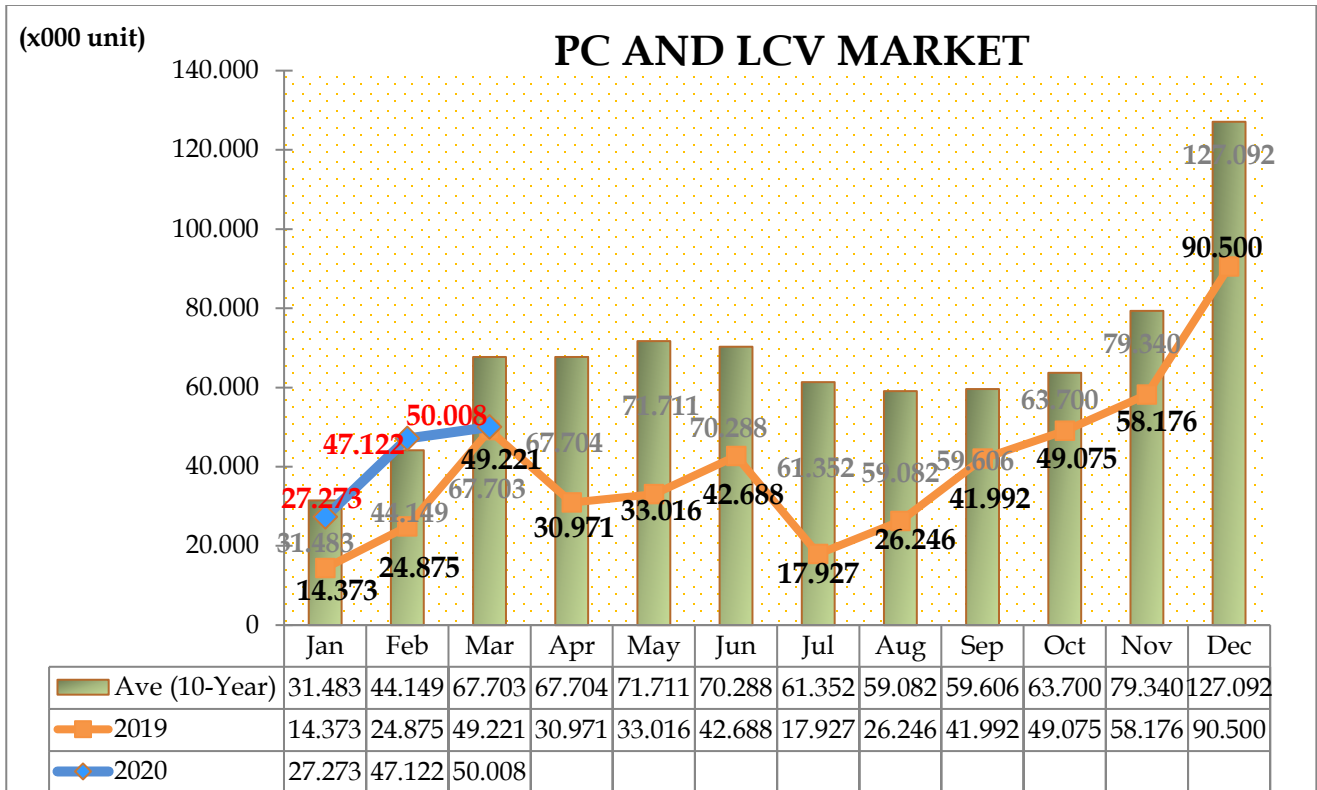
By the end of March 2020, when evaluated according to body type, vans with a share of 75,2% had the highest sales volume (18.629), light trucks followed them with a share of 11,92% (2.952) while the share of minibuses was 6,73% (1.668) and the share of pick-ups was 6,15% (1,524) in light commercial vehicle market.

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In the first quarter of 2020, Turkey's passenger car and light commercial vehicle total market presented a sales number of 124.403. In comparison to the total number of 88.469, the sales went up in a ratio of 40,62%.

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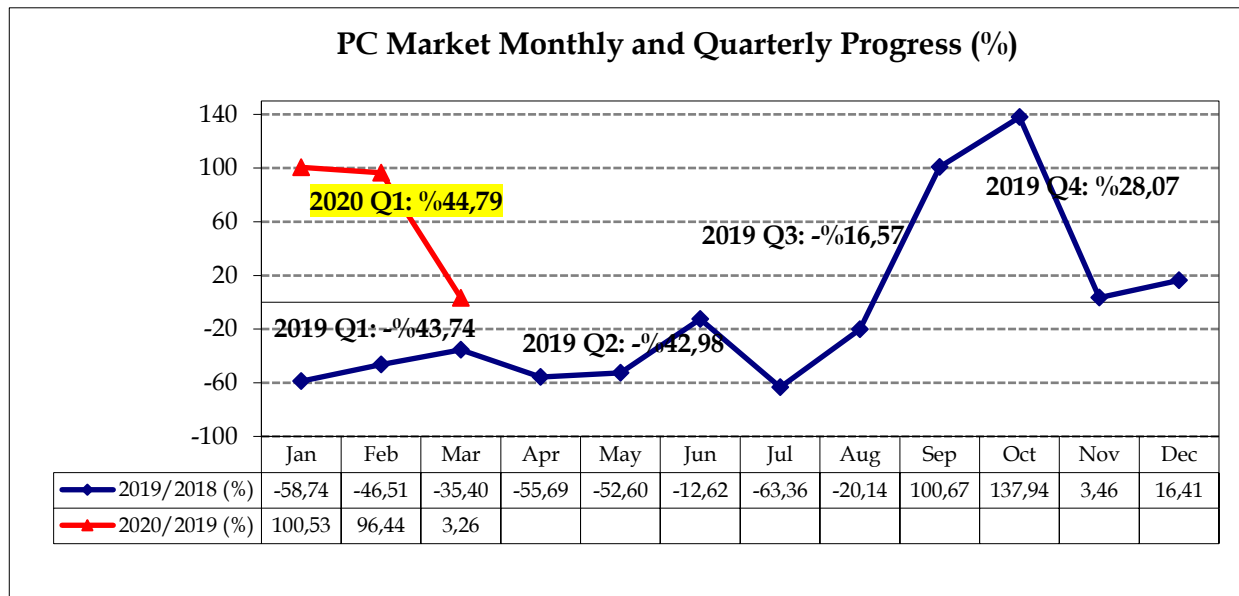
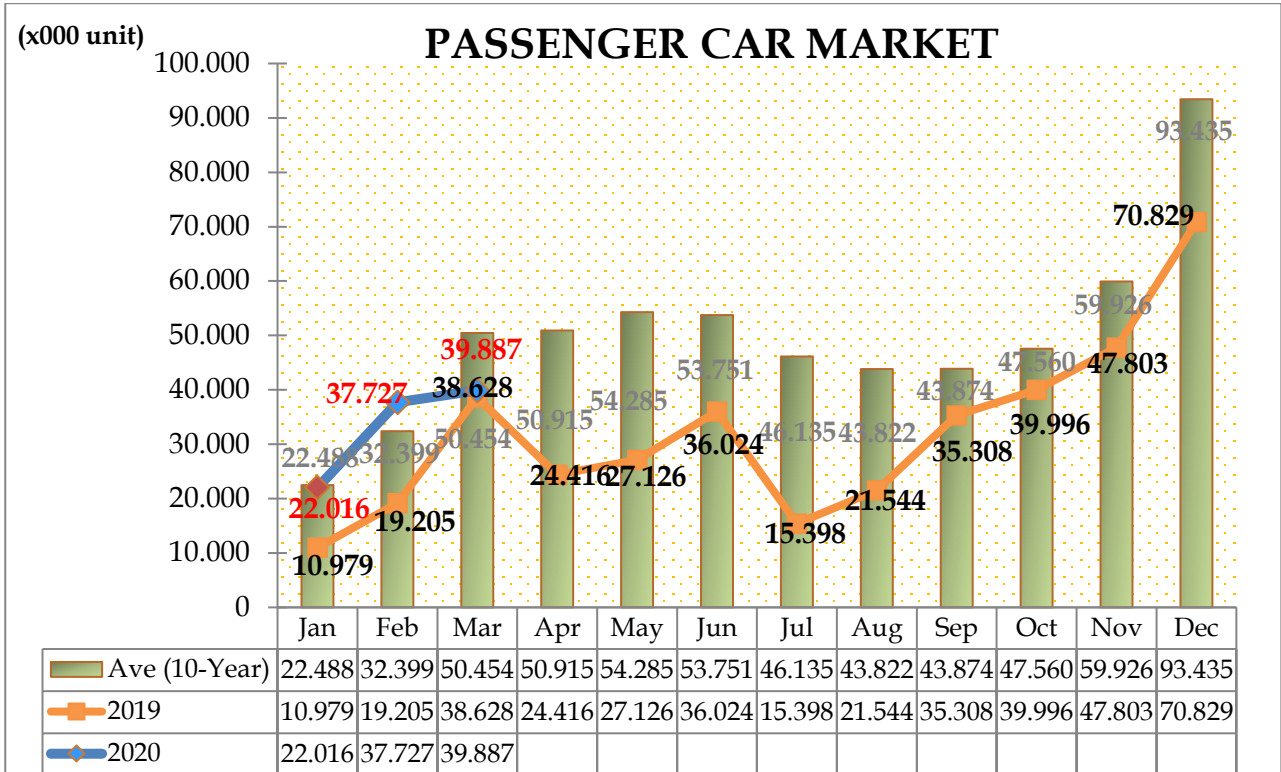
The passenger car and light commercial vehicle market, in comparison to the average 10-year March sales, showed a decrease of 26,14%.



In the first quarter of 2020, passenger car sales went up by 44,79% in comparison to the same period of previous year and were 99.630. In the same period of previous year, the sales were 68.812.

In March 2020, passenger car sales went up by 3,26% in comparison to March 2019 and were 39.887. In March 2019, the sales were 38.628.

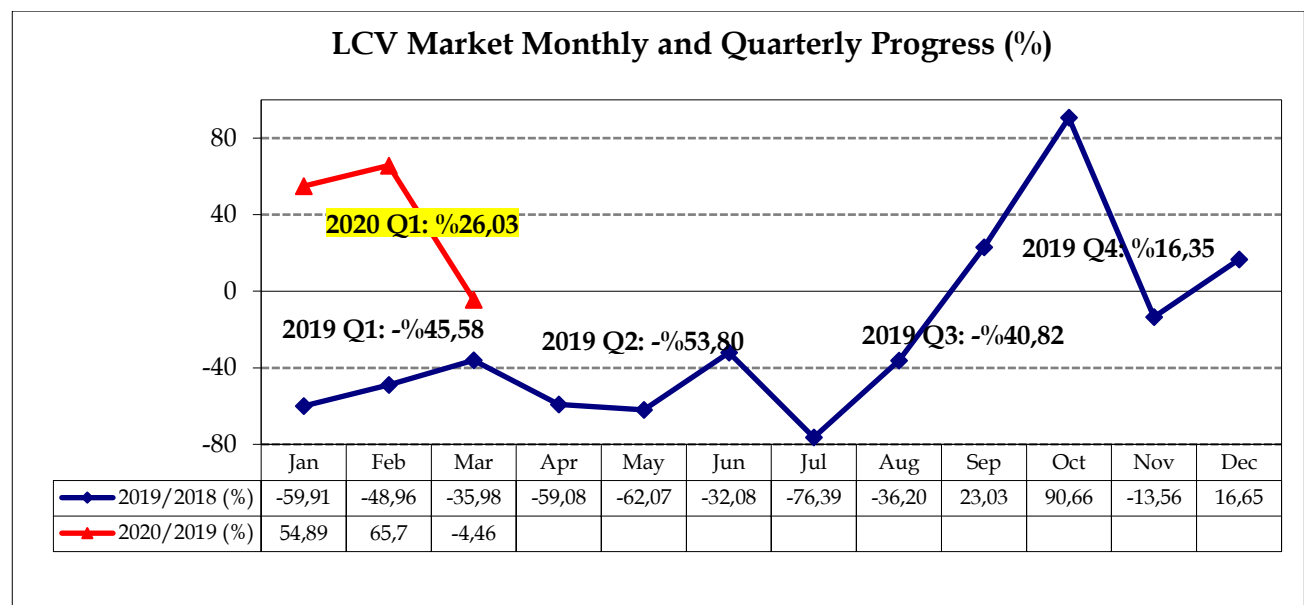
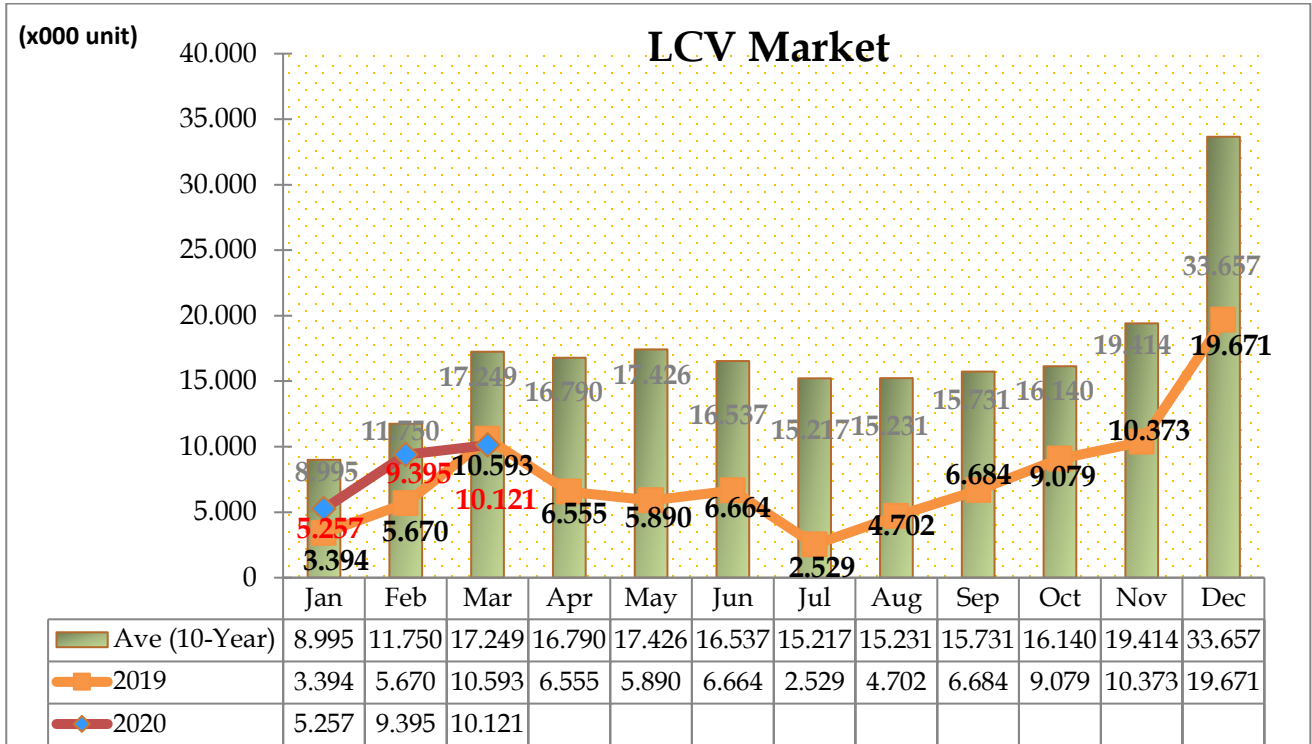
The passenger car market, in comparison to the average 10-year March sales, showed a decrease of 20.94%.



In January-March period of 2020, light commercial vehicle sales increased by 26,03% in comparison to the same period of the last year, to 24.773. In the same period of previous year, the sales were 19.657.

In March 2020, light commercial vehicle sales decreased by 4,46% in comparison to the same month of previous year, to 10.121. In March 2019, the sales were 10.593.

The light commercial vehicle market, in comparison to the average 10-year March sales, showed a decrease of 41,32%.



When the end of March 2020 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 94,57% and a number of 94.224. Passenger cars between 1600cc to 2000cc followed them with a ratio of 1,64% and passenger cars above 2000cc with a ratio of 0,16%. In comparison with the same period of 2019, an increase of 45,1% in the sales of passenger cars below 1600cc and a decrease of 8,4% 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 29,8% was observed. 107 electric cars and 3.503 hybrid cars in total were sold by the end of March 2020.

ENGINE VOLUME	ENGINE TYPE	End of March 2019		End of March 2020		Change	SCT %	VAT %
		Qty	Segment	Qty	Segment			
≤ 1600cc	B/D	64.921	94,35%	94.224	94,57%	45,1%	45, 50, 60	
1601cc - ≤ 2000cc	B/D	1.789	2,60%	1.638	1,64%	-8,4%	100, 110	
≥ 2001cc	B/D	225	0,33%	158	0,16%	-29,8%	160	
≤ 85 kW	ELECTRIC	16	0,02%	64	0,06%	300,0%	3	
86kW - ≤ 120kW	ELECTRIC	0	0,00%	0	0,00%		7	
≥ 121kW	ELECTRIC	27	0,04%	43	0,04%	59,3%	15	
<=1600cc	HYBRID	42	0,06%	39	0,04%	-7,1%	45, 50, 60	
1601cc - <=1800cc (<=50KW)	HYBRID	0	0,00%	0	0,00%		110	
1601cc - <=1800cc (>50KW)	HYBRID	1.731	2,52%	2.950	2,96%	70,4%	45, 50, 60	
1801cc - <=2000cc	HYBRID	30	0,04%	420	0,42%	1300,0%	110	
2001cc - <=2500cc (<=100KW)	HYBRID	0	0,00%	82	0,08%		160	
2001cc - <=2500cc (>100KW)	HYBRID	30	0,04%	11	0,01%	-63,3%	110	
>2500cc	HYBRID	1	0,00%	1	0,00%	0,0%	160	
Total		68.812	100,00%	99.630	100,00%	44,8%	TAX RATES	

When the end of March 2020 passenger car market is studied in terms of average emission values, passenger cars between 100-120 gr/km have the highest share of 41,56% (41.408) and following this, passenger cars between 120-140 gr/km have a share of 28,22% (28.111).

CO2 AVERAGE EMISSION VALUES (gr/km)	End of March 2019		End of March 2020		Change
	Qty	Segment	Qty	Segment	
< 100 gr/km	12.089	17,57%	13.533	13,58%	11,94%
≥ 100 - < 120 gr/km	24.330	35,36%	41.408	41,56%	70,19%
≥ 120 - < 140 gr/km	20.559	29,88%	28.111	28,22%	36,73%
≥ 140 - < 160 gr/km	9.559	13,89%	14.458	14,51%	51,25%
≥ 160 gr/km	2.275	3,31%	2.120	2,13%	-6,81%
Total	68.812	100,00%	99.630	100,00%	44,79%

When the end of March 2020 passenger car market is studied in terms of engine type, petrol car sales have the highest share of 46,55% (46.381), diesel car share comes second with a share of 44,86% (44.694), autogas car share is 4,96%, hybrid car share is 3,52% and electric car share is 0,11%.

ENGINE TYPE	End of March 2019		End of March 2020		Change
	Qty	Segment	Qty	Segment	
Petrol	27.227	39,57%	46.381	46,55%	70,35%
Diesel	37.384	54,33%	44.694	44,86%	19,55%
Autogas	2.324	3,38%	4.945	4,96%	112,78%
Hybrid	1.834	2,67%	3.503	3,52%	91,00%
Electric	43	0,06%	107	0,11%	148,84%
Total	68.812	100,00%	99.630	100,00%	44,79%

End of March 2020	1	2	3	4	5	6	7	Total	Share
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	334	0	0	0	47	0	381	0,4%
B (Entry)	3.110	13.762	687	3	835	22	3.188	21.607	21,7%
C (Compact)	32.142	5.592	139	777	45	509	21.851	61.055	61,3%
D (Medium)	10.934	689	90	1	0	46	2.071	13.831	13,9%
E (Luxury)	1.460	0	71	0	0	95	636	2.262	2,3%
F (Upper Luxury)	63	0	0	0	0	36	395	494	0,5%
Total	47.709	20.377	987	781	880	755	28.141	99.630	100,0%
	47,9%	20,5%	1,0%	0,8%	0,9%	0,8%	28,2%	100,0%	
End of March 2019	1	2	3	4	5	6	7	Total	Share
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	140	0	0	0	17	0	157	0,2%
B (Entry)	2.356	9.639	1.098	64	541	14	2.331	16.043	23,3%
C (Compact)	26.083	4.335	82	378	108	48	11.209	42.243	61,4%
D (Medium)	6.549	309	13	5	0	204	1.609	8.689	12,6%
E (Luxury)	853	0	16	0	0	33	449	1.351	2,0%
F (Upper Luxury)	62	0	0	0	0	35	232	329	0,5%
Total	35.903	14.423	1.209	447	649	351	15.830	68.812	100,0%
	52,2%	21,0%	1,8%	0,6%	0,9%	0,5%	23,0%	100,0%	
Change	1	2	3	4	5	6	7	Total	
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)		138,6%				176,5%		142,7%	
B (Entry)	32,0%	42,8%	-37,4%	-95,3%	54,3%	57,1%	36,8%	34,7%	
C (Compact)	23,2%	29,0%	69,5%	105,6%	-58,3%	960,4%	94,9%	44,5%	
D (Medium)	67,0%	123,0%	592,3%	-80,0%		-77,5%	28,7%	59,2%	
E (Luxury)	71,2%		343,8%	#SAYI/0!		187,9%	41,6%	67,4%	
F (Upper Luxury)	1,6%					2,9%	70,3%	50,2%	
Total	32,9%	41,3%	-18,4%	74,7%	35,6%	115,1%	77,8%	44,8%	

*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 March 2020, 83,4% 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 61,3% has the highest sales volume (61.055) and Segment B follows it with a share of 21,7% (21.607).

By the end of March 2020, when evaluated according to frame type, most preferred body type was sedan again (47,9%, a quantity of 47.709). Following sedan passenger cars are SUV frame with a share of 28,2% and a sales volume of 28.141 and hatchback with a share of 20,5% and total sales volume of 20,377.

By the end of March 2020, automatic transmission passenger car sales numbers, in comparison to the same period in 2019, increased by 62,56%. Automatic transmission passenger car sale shares at the end of March 2020, in comparison to the same period of the previous year, increased from 63,69% to 71,51% (a number of 71.246).

AUTOMATIC TRANSMISSION	End of March 2019		End of March 2020		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	130	0,19%	352	0,35%	170,77%
B (Entry)	7.661	11,13%	10.737	10,78%	40,15%
C (Compact)	26.446	38,43%	43.576	43,74%	64,77%
D (Medium)	7.910	11,50%	13.825	13,88%	74,78%
E (Luxury)	1.351	1,96%	2.262	2,27%	67,43%
F (Upper Luxury)	329	0,48%	494	0,50%	50,15%
Total	43.827	63,69%	71.246	71,51%	62,56%

By the end of March 2020, when evaluated according to body type, vans with a share of 75,2% had the highest sales volume (18.629), light trucks followed them with a share of 11,92% (2.952) while the share of minibuses was 6,73% (1.668) and the share of pick-ups was 6,15% (1.524) in light commercial vehicle market.

LIGHT COMMERCIAL VEHICLE BODY TYPE ANALYSIS	End of March 2019		End of March 2020		Change
	Qty	Segment	Qty	Segment	
VAN	14.176	72,12%	18.629	75,20%	31,41%
LIGHT TRUCK	2.382	12,12%	2.952	11,92%	23,93%
MINIBUS	1.659	8,44%	1.668	6,73%	0,54%
PICK-UP	1.440	7,33%	1.524	6,15%	5,83%
Total	19.657	100,00%	24.773	100,00%	26,03%