

## PRESS REVIEW

# Passenger Car and Light Commercial Vehicle Market

## Showed a Decrease of 21% in the eight months of 2018.

*Passenger Car Market Decreased By 18.5%, Light Commercial  
Vehicle Market Decreased By 28%.*

Turkey's passenger car and light commercial vehicle total market decreased by 20,79% in the first eight months of 2018 compared to the same period of the previous year, to 440,428. In the eight-month period of 2017, total market sales figure was 555,991.

Passenger car sales went down by 18.51% in the first eight months of 2018, compared to the same period of previous year, to 344,870. In the same period of 2017, the sales were 423,198.

In January-August period of 2018, light commercial vehicle market decreased by 28,04%, in comparison to the year before, to 95,558. In the same period of previous year, the sales were 132,793.

# Passenger Car and Light Commercial Vehicle Market

## Showed a Decrease of 53% in August 2018.

*Passenger Car Market Decreased By 51%, Light Commercial  
Vehicle Market Decreased By 58%.*

In August 2018, passenger car and light commercial vehicle market decreased to 34,346. In comparison to the total number of 72,536 in August 2017, the sales went down in a ratio of 52.65%.

In August 2018, passenger car sales went down by 50.85% in comparison to the same month of the year before and were 26,976. Last year, the sales were 54,890.

Light commercial vehicle market decreased by 58.23% in August 2018 compared to August 2017, to 7,370. Last year, the sales were 17,646.



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By the end of August 2018, a decrease of 18.5% in the sales of passenger cars below 1600cc and a decrease of 25.7% 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 22.7% was observed. 114 electric cars and 2,858 hybrid passenger cars were sold in the first eight months of 2018.

When the average emission values of the passenger car market in the end of August 2018 are considered, the passenger cars between 100-120g/km took the largest share with a ratio of 41.12%, with a number of 141,806.

At the end of August 2018, diesel passenger car sales share decreased to 59.41%, while the automatic transmission passenger car sales share increased to 65%.

At the end of August 2018, 83.74% 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 (a quantity of 189,374). When evaluated according to frame, most preferred body type was again Sedan (51.0%, a quantity of 175,721).

.At the end of August 2018, in light commercial vehicle market, when evaluated according to body type, Van's with a share of 68.78% had the highest sales volume (65,721), Light trucks followed them with a share of 12.26% (11,712) while the share of Pick-ups was 10.32% (9,865) and the share of Minibuses was 8.64% (8,260).

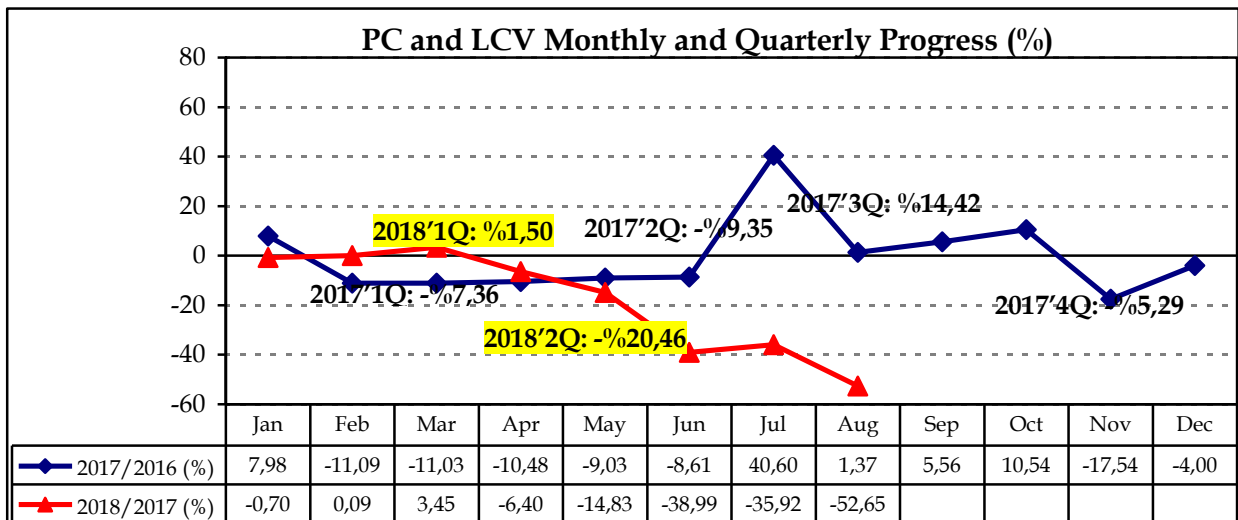
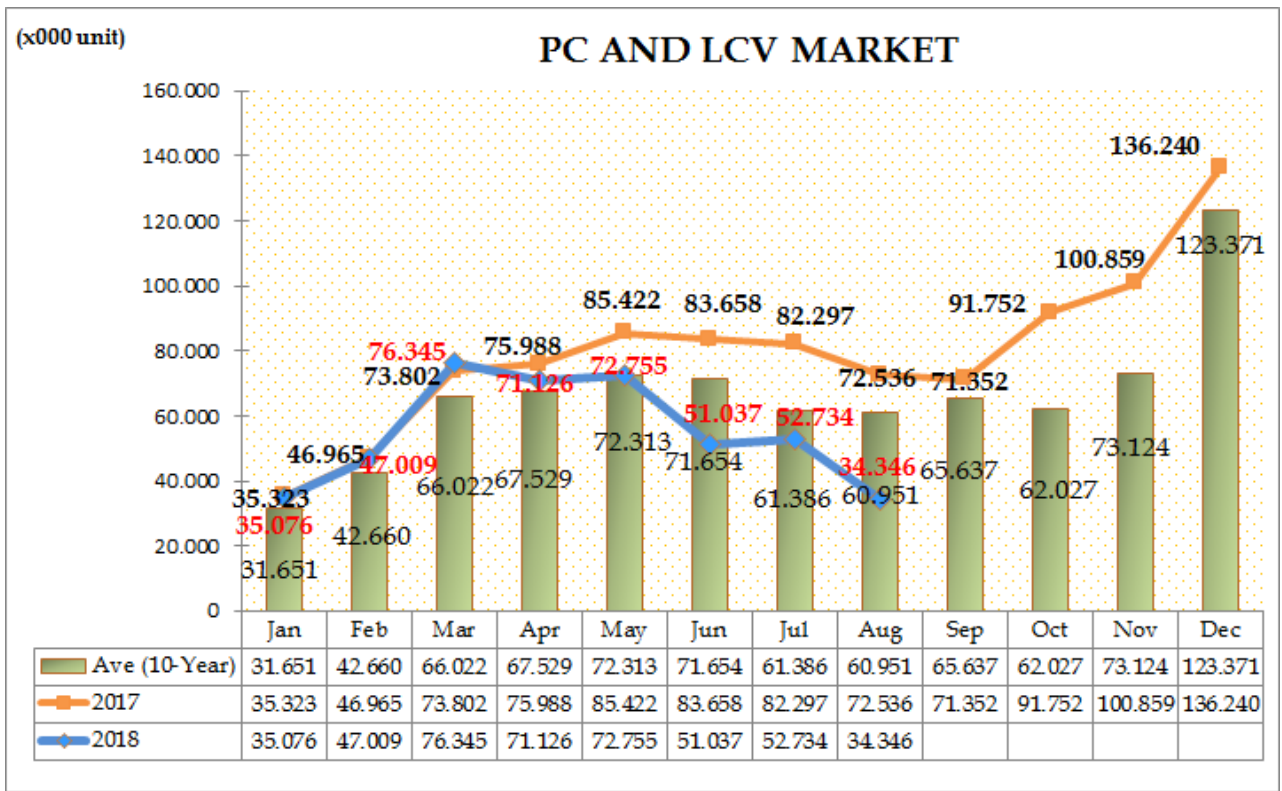
**Hayri ERCE, PhD.**  
**Executive Coordinator**  
**Automotive Distributors' Association**

## PRESS RELEASE

In the first eight months of 2018, Turkey's passenger car and light commercial vehicle total market decreased by %20,79 and presented a sales number of 440,428. Last year, the sales were 555,991.

In August 2018, passenger car and light commercial vehicle market presented a sales number of 34,346. In comparison to the total number of 72,536 in August 2017, the sales went down in a ratio of 52.65%.

The passenger car and light commercial vehicle market, in comparison to the average 10-year August sales, showed a decrease of 43.65%.

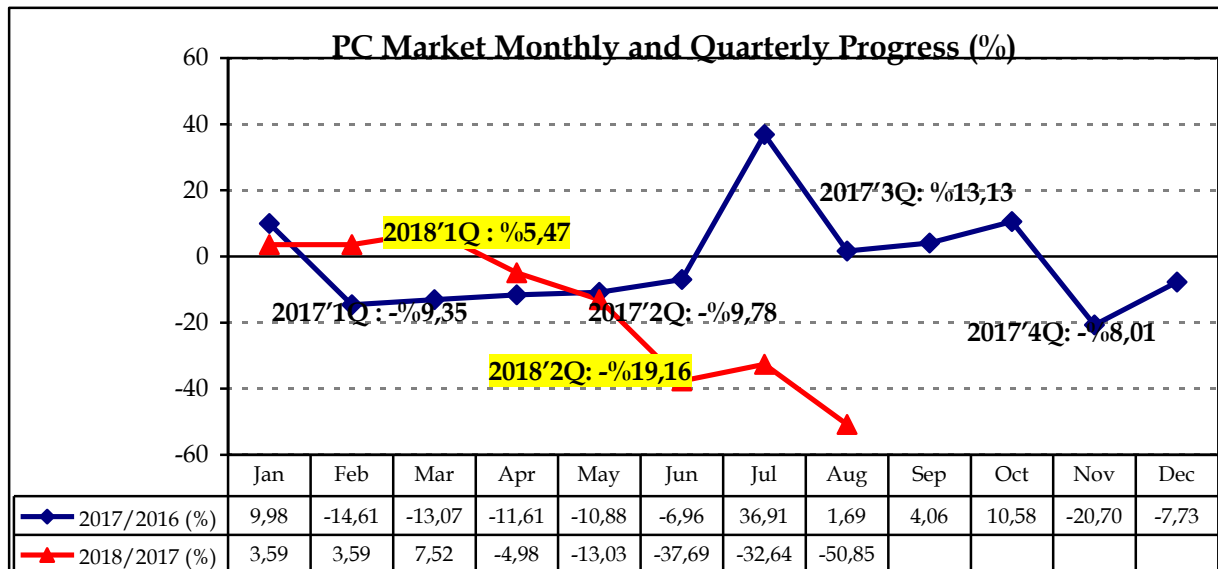
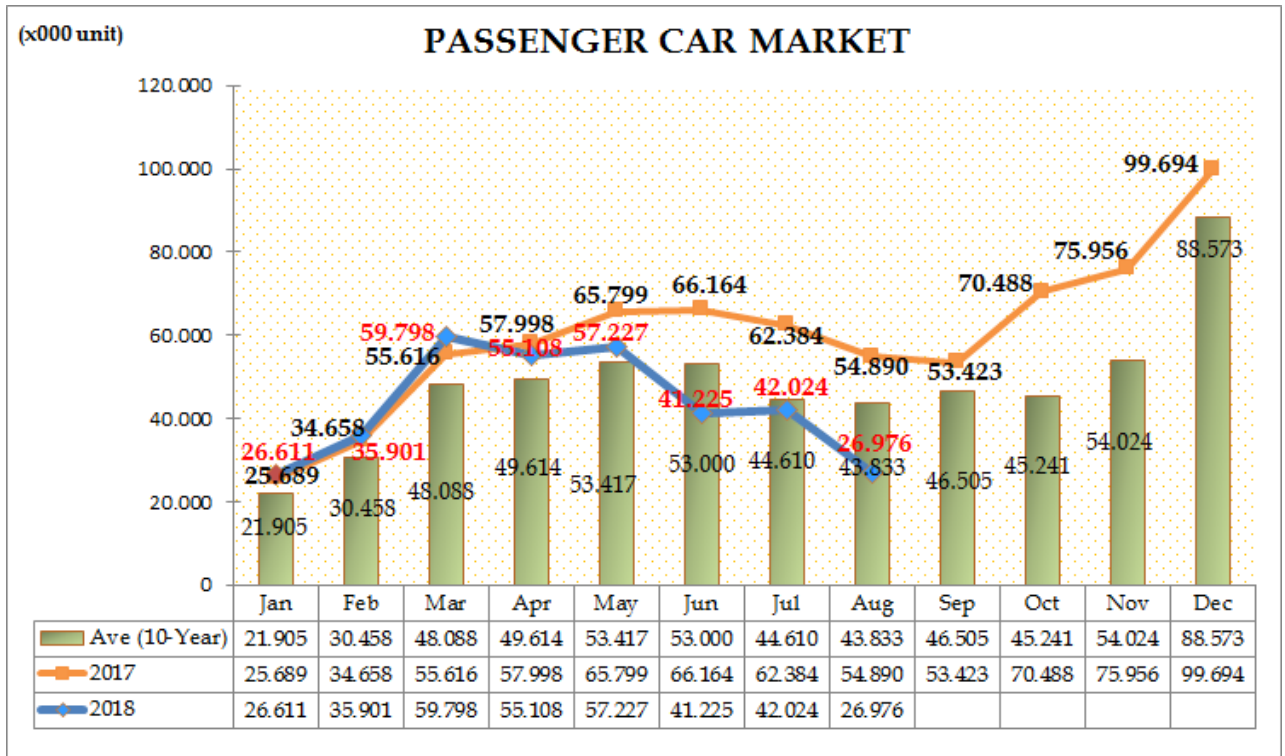


## PRESS RELEASE

In the first eight months of 2018, passenger car sales went down by 18.51% in comparison to the same period of previous year and were 344,870. In the same period of previous year, the sales were 423,198.

In August 2018, passenger car sales went down by 50.85% in comparison to the same month of the year before and were 26,976. In August 2017, the sales were 54,890.

The passenger car market, in comparison to the average 10-year August sales, showed a decrease of 38.46%.

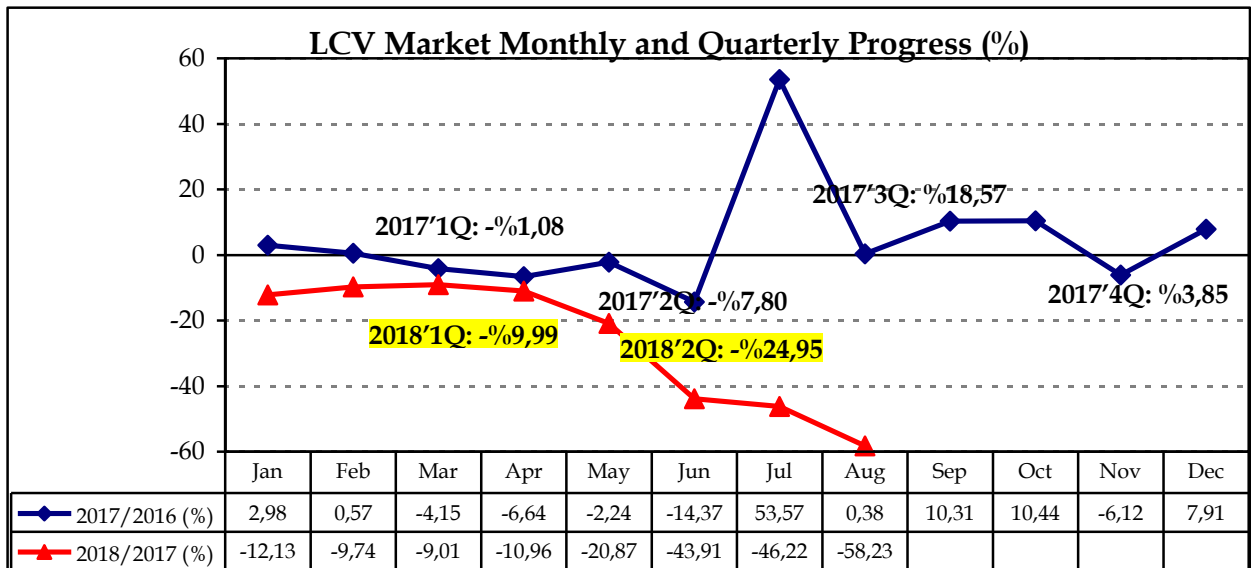
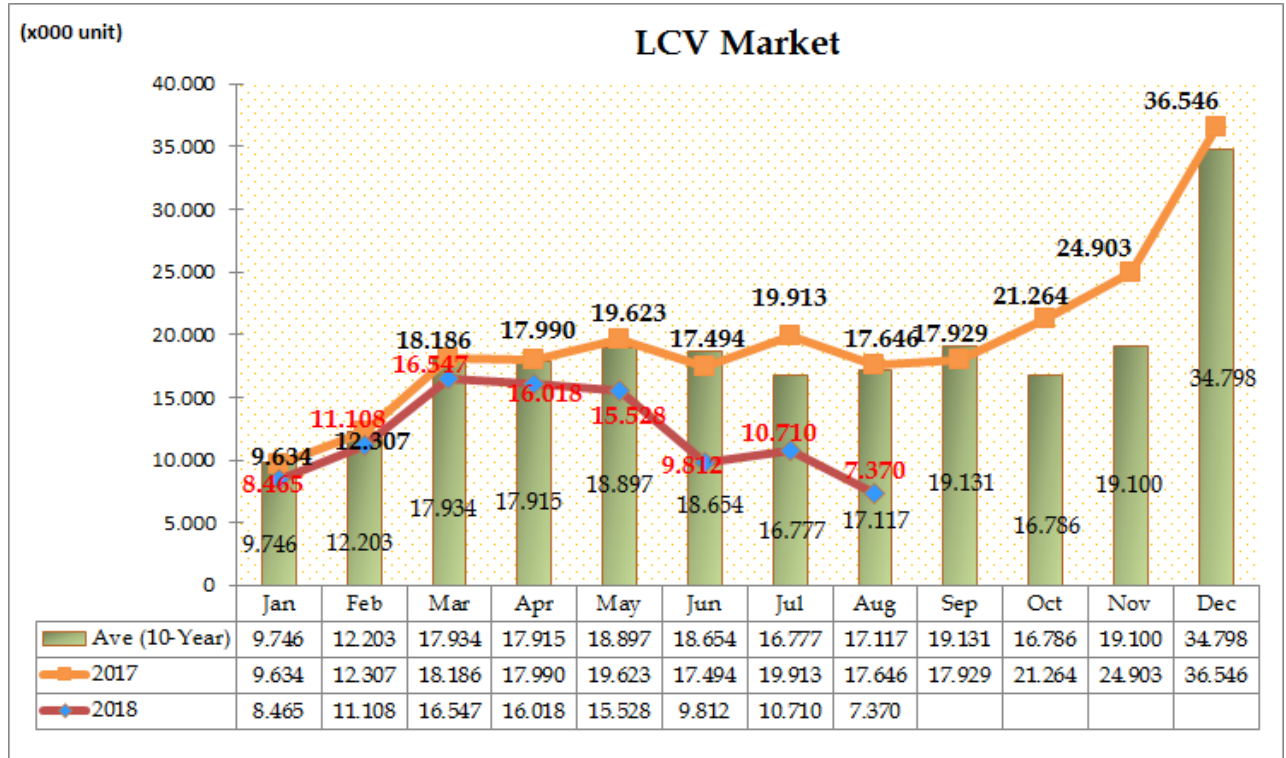


## PRESS RELEASE

In January-August period of 2018, light commercial vehicle sales decreased by 28.04% in comparison to the same period of the last year, to 95,558. In the same period of previous year, the sales were 132,793.

In August 2018, light commercial vehicle sales decreased by 58.23% in comparison to the same month of previous year, to 7,370. In August 2017, the sales were 17,646.

The light commercial vehicle market, in comparison to the average 10-year August sales, showed a decrease of 56.94%.



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When the end of August 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 95.98% and a number of 331,020. Passenger cars between 1600cc to 2000cc followed them with a ratio of 2.86% and passenger cars above 2000cc with a ratio of 0.29%. In comparison with the same period of 2017, a decrease of 18.5% in the sales of passenger cars below 1600cc and a decrease of 25.7% 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 22.7% was observed. 75 electric cars below 85kW engine power and 39 electric cars above 121 Kw, a total of 114 electric cars were sold in the first eight months of 2018.

At the end of August 2018, 410 hybrid cars under 1600cc, 2,226 hybrid cars between 1601cc-1800cc (>50kW), 24 hybrid cars between 1801cc - 2000cc, 193 hybrid cars between 2001cc-2500cc (>100KW) and 5 hybrid cars above 2500cc were sold. 2,858 hybrid cars were sold in January-August period of 2018.

ENGINE VOLUME	ENGINE TYPE	End of August 2017		End of August 2018		Change	SCT %	VAT %
		Qty	Segment	Qty	Segment			
≤ 1600cc	B/D	406.215	95,99%	331.020	95,98%	-18,5%	45, 50, 60	
1601cc - ≤ 2000cc	B/D	13.288	3,14%	9.876	2,86%	-25,7%	100, 110	
≥ 2001cc	B/D	1.296	0,31%	1.002	0,29%	-22,7%	160	
≤ 85 kW	ELECTRIC	11	0,00%	75	0,02%	581,8%	3	
86kW - ≤ 120kW	ELECTRIC	0	0,00%	0	0,00%	#SAYI/0!	7	
≥ 121kW	ELECTRIC	30	0,01%	39	0,01%	30,0%	15	
<=1600cc	HYBRID	203	0,05%	410	0,12%	102,0%	60	
1601cc - <=1800cc (<=50KW)	HYBRID	0	0,00%	0	0,00%	#SAYI/0!	110	18
1601cc - <=1800cc (>50KW)	HYBRID	2.013	0,48%	2.226	0,65%	10,6%	60	
1801cc - <=2000cc	HYBRID	36	0,01%	24	0,01%	-33,3%	110	
2001cc - <=2500cc (<=100KW)	HYBRID	0	0,00%	0	0,00%	#SAYI/0!	160	
2001cc - <=2500cc (>100KW)	HYBRID	99	0,02%	193	0,06%	94,9%	110	
>2500cc	HYBRID	7	0,00%	5	0,00%	-28,6%	160	
<b>Total</b>		<b>423.198</b>	<b>100,00%</b>	<b>344.870</b>	<b>100,00%</b>	<b>-18,51%</b>	<b>TAX RATES</b>	

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When the end of August 2018 passenger car market is studied in terms of average emission values, passenger cars between 100-120 gr/km have the highest share of 41.12% (141,806) and following this, passenger cars between 120-140 gr/km have a share of 21.68% (74,777).

CO2 AVERAGE EMISSION VALUES (gr/km)	End of August 2017		End of August 2018		Change
	Qty	Segment	Qty	Segment	
< 100 gr/km	64.556	15,25%	63.019	18,27%	-2,38%
≥ 100 - < 120 gr/km	193.681	45,77%	141.806	41,12%	-26,78%
≥ 120 - < 140 gr/km	100.089	23,65%	74.777	21,68%	-25,29%
≥ 140 - < 160 gr/km	52.737	12,46%	54.705	15,86%	3,73%
≥ 160 gr/km	12.135	2,87%	10.563	3,06%	-12,95%
<b>Total</b>	<b>423.198</b>	<b>100,00%</b>	<b>344.870</b>	<b>100,00%</b>	<b>-18,51%</b>

In the end of August 2018, diesel passenger car sales decreased by 21.36% in comparison to the same period of previous year. Diesel share in passenger car sales at the end of August 2018, when compared to the same period of 2017, decreased to 59.41% (204,898).

DIESEL	End of August 2017		End of August 2018		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	0	0,00%	0	0,00%	#SAYI/0!
B (Entry)	89.138	66,98%	61.964	62,96%	-30,49%
C (Compact)	134.763	59,59%	110.319	58,25%	-18,14%
D (Medium)	30.324	63,57%	27.090	61,87%	-10,66%
E (Luxury)	4.459	35,50%	3.670	36,35%	-17,69%
F (Upper Luxury)	1.854	80,96%	1.855	84,20%	0,05%
<b>Total</b>	<b>260.538</b>	<b>61,56%</b>	<b>204.898</b>	<b>59,41%</b>	<b>-21,36%</b>

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End of August 2018	1	2	3	4	5	6	7	Total	Share
Segment	S/D	H/B	S/W	MPV	CDV	Sport	SUV		
A (Mini)	0	925	0	0	0	67	1	993	0,3%
B (Entry)	22.483	57.670	2.990	284	5.035	91	9.863	98.416	28,5%
C (Compact)	114.067	24.858	694	2.938	0	802	46.015	189.374	54,9%
D (Medium)	31.864	2.382	258	29	0	955	8.299	43.787	12,7%
E (Luxury)	6.943	0	17	5	0	289	2.843	10.097	2,9%
F (Upper Luxury)	364	0	0	0	0	153	1.686	2.203	0,6%
<b>Total</b>	<b>175.721</b>	<b>85.835</b>	<b>3.959</b>	<b>3.256</b>	<b>5.035</b>	<b>2.357</b>	<b>68.707</b>	<b>344.870</b>	<b>100,0%</b>
	<b>51,0%</b>	<b>24,9%</b>	<b>1,1%</b>	<b>0,9%</b>	<b>1,5%</b>	<b>0,7%</b>	<b>19,9%</b>	<b>100,0%</b>	

End of August 2017	1	2	3	4	5	6	7	Toplam	Pay
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV		
A (Mini)	0	1.311	0	0	0	89	0	1.400	0,3%
B (Entry)	30.942	78.748	3.660	654	7.367	147	11.557	133.075	31,4%
C (Compact)	133.008	38.729	1.236	3.756	0	1.607	47.833	226.169	53,4%
D (Medium)	35.992	2.277	475	22	0	1.329	7.609	47.704	11,3%
E (Luxury)	9.316	4	31	4	0	371	2.834	12.560	3,0%
F (Upper Luxury)	424	0	0	0	0	137	1.729	2.290	0,5%
<b>Total</b>	<b>209.682</b>	<b>121.069</b>	<b>5.402</b>	<b>4.436</b>	<b>7.367</b>	<b>3.680</b>	<b>71.562</b>	<b>423.198</b>	<b>100,0%</b>
	<b>49,5%</b>	<b>28,6%</b>	<b>1,3%</b>	<b>1,0%</b>	<b>1,7%</b>	<b>0,9%</b>	<b>16,9%</b>	<b>100,0%</b>	

Change	1	2	3	4	5	6	7	Toplam
Segment	S/D	H/B	S/W	MPV	CDV	Spor	SUV	
A (Mini)		-29,4%				-24,7%		-29,1%
B (Entry)	-27,3%	-26,8%	-18,3%	-56,6%	-31,7%	-38,1%	-14,7%	-26,0%
C (Compact)	-14,2%	-35,8%	-43,9%	-21,8%		-50,1%	-3,8%	-16,3%
D (Medium)	-11,5%	4,6%	-45,7%	31,8%		-28,1%	9,1%	-8,2%
E (Luxury)	-25,5%	-100,0%	-45,2%	25,0%		-22,1%	0,3%	-19,6%
F (Upper Luxury)	-14,2%					11,7%	-2,5%	-3,8%
<b>Total</b>	<b>-16,2%</b>	<b>-29,1%</b>	<b>-26,7%</b>	<b>-26,6%</b>	<b>-31,7%</b>	<b>-36,0%</b>	<b>-4,0%</b>	<b>-18,5%</b>

\*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 August 2018, 83.74% 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% has the highest sales volume (189,374) and Segment B follows it with a share of 28.5% (98,416).

**At the end of August 2018, when evaluated according to frame type,** most preferred body type was again Sedan (51.0%, a quantity of 175,721). Following Sedan passenger cars are Hatchback frame with a share of 24.9% and a sales volume of 85,835 and SUV with a share of 19.9% and total sales volume of 68,707.



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At the end of August 2018, automatic transmission passenger car sales numbers, in comparison to the same period in 2017, decreased by 9.85%. Automatic transmission passenger car sale shares at the end of August 2018, in comparison to the same period of the previous year, increased from 58.76% to 65.0% (a number of 224,168).

AUTOMATIC TRANSMISSION	End of August 2017		End of August 2018		Change
	Qty	Share in the Segment	Qty	Share in the Segment	
A (Mini)	1.056	75,43%	845	85,10%	-19,98%
B (Entry)	56.928	42,78%	45.702	46,44%	-19,72%
C (Compact)	132.033	58,38%	124.573	65,78%	-5,65%
D (Medium)	43.788	91,79%	40.751	93,07%	-6,94%
E (Luxury)	12.557	99,98%	10.094	99,97%	-19,61%
F (Upper Luxury)	2.290	100,00%	2.203	100,00%	-3,80%
<b>Total</b>	<b>248.652</b>	<b>58,76%</b>	<b>224.168</b>	<b>65,00%</b>	<b>-9,85%</b>

At the end of August 2018, when evaluated according to body type, Van's with a share of 68.78% had the highest sales volume (65,721), Light trucks followed them with a share of 12.26% (11,712) while the share of Pick-ups was 10.32% (9,865) and the share of Minibuses was 8.64% (8,260) in light commercial vehicle market.

LIGHT COMMERCIAL VEHICLE BODY TYPE ANALYSIS	End of August 2017		End of August 2018		Change
	Qty	Segment	Qty	Segment	
VAN	92.656	69,77%	65.721	68,78%	-29,07%
LIGHT TRUCK	16.549	12,46%	11.712	12,26%	-29,23%
MINIBUS	12.368	9,31%	8.260	8,64%	-33,21%
PICK-UP	11.220	8,45%	9.865	10,32%	-12,08%
<b>Total</b>	<b>132.793</b>	<b>100,00%</b>	<b>95.558</b>	<b>100,00%</b>	<b>-28,04%</b>