

土耳其汽車生產及對扣件需求影響

Car Manufacturing in Turkey and Its Influence on Fastener Demand

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Introduction

The statistics show that Turkish manufacturers have increased their production capacity since 2012 annually. Turkey became the 14th biggest car manufacturing country in the world in 2017. Motor vehicles play a significant part of the Turkish economy and they account for 6.6% of Turkish industrial production.

The following table elaborates the annual Turkish car production:

Year	2017	2016	2015	2014	2013	2012
Unit of vehicles	1,695,731	1,485,927	1,358,796	1,170,445	1,125,534	1,072,978
YoY(%)	14.1%	9.4%	16.1%	4.0%	4.9%	—

Based on ICCT statistics, more than 17 million cars exist on Turkish roads, which means every 1,000 passengers have 118 vehicles. This ratio is about 20% of the ratio of developed countries. For example, the number in Germany is 548.

Each year 0.6 million units of passenger cars are newly registered in Turkey. About 73% of the total registrations are imported from abroad (about 438,000 units of cars), while the other 27% of the total registered new cars (about 162,000 units of cars) are produced locally in Turkey. It is concluded that 90% of the total 1.7 million units of cars produced in Turkey in 2017 were exported. Based on Atlas media statistics, the top export destinations of Turkish cars were Germany, UK, Iraq and Italy.

The following table shows the detail of the sold foreign car brands in Turkey in 2017:

Brand	The Total Units Sold in Turkey in 2017
Renault	48,780
VW	36,710
Fiat	26,650
Hyundai	22,500
Opel	18,790
Ford	18,490
Dacia	17,150
Toyota	15,560
Honda	12,750
Peugeot	12,710
Total	230,090
Other brands	415,000

Fastener and Automotive Industries

Turkey imported more than 750 million USD worth of fasteners in 2017. 20% of the imported fasteners came from China, 15.4% of the imported fasteners were made in Germany, and France; Japan, Taiwan and Italy were ranked in the next levels (see the following table).

The following table shows the detailed data:

Unit: 1,000 USD

Exporter	2013	2014	2015	2016	2017
World	617,139	626,212	663,758	703,832	753,358
China	181,508	185,196	191,724	177,439	151,893
Germany	98,145	107,647	99,907	103,081	115,762
France	63,414	55,046	56,046	59,062	64,421
Japan	29,830	31,536	29,642	39,246	63,724
Taiwan	42,230	47,283	59,246	66,143	54,285
Italy	34,143	34,112	43,738	47,246	52,667
Others	167,869	165,392	183,455	211,615	250,606

The left table for imported cars shows that the main car exporters to Turkey were from France, Germany, and Japan, while Italy, USA and Romania were ranked in the 4th to 6th levels. On the other hand, instead of China, Germany, France and Japan were the main fastener exporters to Turkey.

Comparing imported fastener statistics with imported car brands shows that car exporters and fastener exporters in a certain country could work closely together in terms of export.

China is the biggest fastener exporter to Turkey and the biggest advantage that Chinese fastener producers have is their low-price productions.

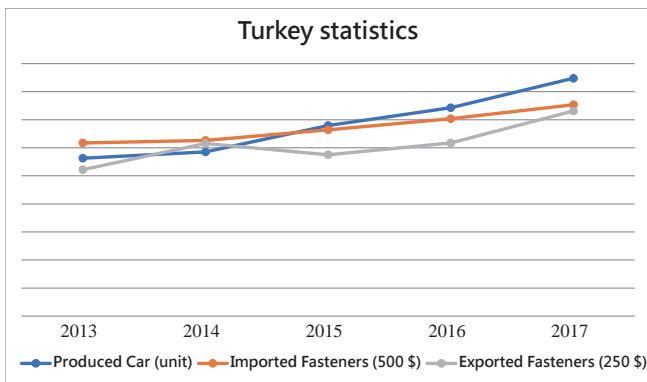
In terms of export, the value of Turkish exported fasteners was more than 365 million USD, the main buyer of Turkish fasteners was Germany, which bought about 40% of the total Turkish exported fasteners. France and Italy were in the 2nd and 3rd places respectively (see the following table).

Importer	2013	2014	2015	2016	2017
World	260,935	307,773	287,406	308,656	365,639
Germany	84,981	109,018	102,807	117,081	145,507
France	12,021	13,413	12,512	11,474	13,469
Italy	7,872	8,854	8,148	9,931	12,801
Others	156,061	176,488	163,939	170,170	193,862

Statistics show that the main markets for Turkish car export were Germany, UK, Iraq and Italy, and the main importer of Turkish fasteners was Germany, too. Italy also exists in both lists (for main car importers and fastener importers). So, in terms of export both lists are almost synchronized.

It is Time to Invest in the Fastener and Automotive Industries in Turkey

Although, about one-fourth of Turkish people, in comparison with developed countries (like Germany), use cars, for Turkey strong growth is expected in future years.



Turkey has a large number of vehicle manufacturing plants (almost 24), with a majority of the local vehicle production being exported abroad. As a result of this strong dependence of the Turkish economy on the automotive industry, it is of particular importance for them to ensure that this industry sector is ready to meet current and future challenges, such as local air pollution, climate change, and energy security, by offering innovative vehicles that can compete on the global market.

For following reasons, it seems that it is a good time to invest in Automotive and Fastener industries in Turkey.

- High level of integration into the global automotive industry and it is the 14th major automotive producer in the world.
- The advantage of vehicles of Turkish origin holds the leading position among the vehicles coming from the outside of EU.
- Turkey is a production, export, and engineering hub of global brands for the international market.
- Quality products with high export rates.
- Strong economic growth with increasing income per capita and a burgeoning middle-class.
- Favourable demographics with a dynamic, young, and skilled labour force supporting the industry.
- Cost-competitive labour and energy prices.
- Giants of global automotive value chain benefit from Turkey's location, cost, and competitive advantages.
- Because of their profitable business in the country, companies in Turkey continue to invest in the country's future. ■



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