



# taysad

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# Turkish Automotive Industry

Automotive Manufacturers Association  
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“Transforming the sector:  
From production to innovation,  
R&D and design”

Uludag Automotive Industry Exporters'  
Association Chairman of the Board

**ORHAN SABUNCU**

“Automotive OEMs and suppliers  
drive Turkish economy”

Automotive Distributers' Association  
Chairman of the Board

**MUSTAFA BAYRAKTAR**

“Innovation is needed for  
a stronger automotive sector”

Authorized Automotive Dealers  
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“Change is coming: the new mobility  
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Avrupa Otomotiv Yan Sanayicileri Derneği  
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## Our objective is to become a production and engineering center

Automotive industry is the top sector of our country's export with its volume of more than 20 billion USD. With this size, the automotive sector employs 50.000 people while the supply industry employs 200.000 people. These figures reach to 1 million 250 thousand people when dealerships, logistics, authorized and private services are included.

Our automotive industry achieved serious increases both in production and export by reaching out 1 million 750 thousand units of production capacity through the investments made in 2014 and 2015. The new investments, as well as the recovery of European market, supported the automotive industry's determined growth. In 2015 a new record was set, which was 1 million 359 thousand units in production and 992 thousand units in export.

This serious growth trend of Turkish automotive sector made Turkey 15th among the world's biggest and 5th among the Europe's biggest automotive manufacturer. Turkey in the meantime became a center of excellence. As of 2015 Turkey, who was the top light vehicle manufacturer of Europe, was the second in truck manufacturing and the 7th in automotive production.

As global competition continue to increase, we work accordingly to attract new investments to our country and we collaborate with our suppliers to make our industry's growth sustainable. We expect our industry,

which continues its export oriented production growth, to set new records in 2016. We envisage that our industry will reach to 1.4 million to 1.5 million units in production and 1.05 million to 1.1 million units in export with a 10 percent increase.



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*DAF- PACCAR Group hosted TAYSAD members within TR Ministry of Economy Sectoral Trade Delegation for the second time in its premises in Eindhoven. The second round of the event, which has held in 2014 for the first time, was completed on July 13-15th, 2016 with the cooperation of 17 different TAYSAD member companies.*



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KUDRET  
ÖNEN

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MANUFACTURERS  
ASSOCIATION CHAIRMAN  
OF THE BOARD**

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## Let you donate and let us take them to right place!

ADMOG Project, which is carried out by you in order to support vocational education and to ensure that more qualified personnel are raised for the industry, has its 4th year.

In ADMOG, which is a social responsibility project carried out by TAYSAD, departure is made with the goal of forwarding not only new equipment but also tools, equipment, machinery and materials, which served us in our plants and workshops for many years and which contributed us to produce value, to Industrial Vocational High Schools that are in need of them.

Used equipment sent by you are sent in their special packages to determined schools after

being cleaned and maintained by the expert teams. Schools, which shall receive the donations, are determined by means of joint work with Ministry of National Education.

**Let you support ADMOG Project, which realized forwarding of about 2 thousand equipment to 136 schools in 64 provinces since 2013 that is when initiative was started, by means of your equipment donations as well and this way let you help ensuring that young men/women, who will contribute to the future of our industry and who are well educated and qualified, are acquired.**

For Detailed Information: Project Responsible **BURAK ODABAŞ**  
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# The developed potential of Turkish Suppliers creates competitive superiority



**Alper Kanca**  
TAYSAD Chairman

Dear Readers,

**W**hen we look at car exports to Europe, we see that Turkey leads Korea and Japan by a far margin. Last year, Turkey exported 700,000 cars to Europe, while Japan exported only 290,000. Similarly, Turkey is the number one importer of cars from the EU. In terms of both production and sales, Turkey is one of the important players in the European automotive industry.

OEMs in Turkey invested more than USD12 billion in operations in Turkey between 2000-2012. These investments made Turkey a key player in the global value chain of international OEMs. The Turkish automotive industry meets, if not exceeds, international quality and safety standards. Moreover, due to its value added production approach, it is extremely efficient and competitive.

Thanks to its competitive, skilled labor force; its dynamic, high-potential domestic market; and its strategic geographic location, the motor vehicle production of 13 global EOMs in 2002 was 374,000, a figure that climbed to over 1.3 million in 2015. This increase represents an annual compounded growth rate of around 10% for the period in question. Especially if we take into consideration the post-2008 global crisis and the fall in production numbers, we can see that Turkey's success is remarkable.

The significant growth the Turkish automotive sector has made Turkey the 15th largest automobile producing countries in the world, and 5th largest in Europe. Turkey has become a center of excellence, particularly in the area of commercial motor vehicle production. At the end of 2015, Turkey was Europe's number one light commercial vehicle producer, coming in 2nd and 7th place in truck and automobile manufacturing, respectively.

Turkey is not only an exceptional manufacturing center; the Turkish automotive industry has also significantly

improved its skills in R&D, design and branding. At the end of 2015, it had 75 certified R&D centers belonging to its manufacturers and suppliers. Of these, 59 are TAYSAD members.

Ford, Fiat, Daimler, AVL and Segula are leading examples of companies engaged in product development, design and engineering in Turkey. Ford Otosan's R&D center is one of the three largest Ford R&D centers in the entire world. Fiat's Bursa R&D center is the Italian company's only center outside of Italy providing service to the European market. Moreover, Daimler's Istanbul R&D center serves a complementary role in the German's company's truck and bus production activities in Turkey.

Perhaps most importantly, compared to rival countries, Turkey has the most developed supply chain potential. There are roughly 1,000 suppliers making parts for OEMs in the country. Most of these are mid-sized, family companies that are export oriented and open to growth and development.

Turkish suppliers make up a financially strong network that is experienced in international collaboration, and flexible in terms of meeting the requirement of different quality systems. The supply industry exports to 180 countries annually, with the value of those exports reaching nearly USD185 billion.

As TAYSAD, we invite Tier1 suppliers, and their global brands, which have carved out enormous shares of the automotive market, to take advantage of the advantages offered by the Turkish Automotive Industry. Do not hesitate to call TAYSAD ([www.taysad.org.tr](http://www.taysad.org.tr)), the sole representative of Turkish automotive suppliers, when you have a question about anything, or you have need for assistance. We are ready to help you with anything automotive related.

Sincerely, ■

## PRODUCTION OF AUTOMOTIVE MANUFACTURERS 8 MONTHS OF 2016

Companies	Pass.Car	%	L. Truck	%	Mid. Truck	%	Pick Up	%	Bus	%	Mini-Bus	%	Midi-Bus	%	F. Tractor	%	Total
A.I.O.S.			859	56	15	0	1.610	1	127	2			827	36			3.438
FORD OTOSAN	15.370	3			3.048	30	173.222	57			25.333	97					217.173
HATTAT TARIM															3.348	9	3.348
HONDA TÜRKİYE	6.787	1															6.787
HYUNDAI ASSAN	149.880	27															149.880
KARSAN							2.193	1	61	1	836	3	102	4			3.192
M. BENZ TÜRK					7.034	70			3.031	54							10.065
MAN TÜRKİYE									1.238	22							1.238
OTOKAR							434	0	372	7			603	26			1.409
OYAK RENAULT	215.347	38															215.347
TEMSA GLOBAL			684	44					763	14			770	33			2.217
TOFAŞ	103.292	18					128.860	42									232.152
TOYOTA	72.016	13															72.016
TÜRK TRAKTÖR															32.253	91	32.253
<b>TOTAL</b>	<b>562.692</b>	<b>100</b>	<b>1.543</b>	<b>100</b>	<b>10.097</b>	<b>100</b>	<b>306.319</b>	<b>100</b>	<b>5.592</b>	<b>100</b>	<b>26.369</b>	<b>100</b>	<b>2.302</b>	<b>100</b>	<b>35.601</b>	<b>100</b>	<b>950.515</b>

Source: OSD

## Automotive production increased by 9 percent

Automotive production in Turkey rose 9 percent year-on-year in the first six months of 2016 and realized as 725.500. According to the Automotive Manufacturers Association (OSD) report total production increased by 9 percent within the January-May period of this year, while automobile production realized as 441.366 units with an increase of 13 percent year-on-year.

**O**SD report on 2016 June Production, Export and Sales Assessment released. According to the report, total production increased by 9 percent and realized as 725.477 units within 2016 January – May period, while automobile production rose about 13 percent year on year and realized as 441.366 units.

When compared data from 2006 to 2016 period, both total and automotive production were the highest since 2006. In the same period total market reached to 450.997 units with a decrease by 1 percent year on year. Automotive market on the other hand reached to 338.482 units with a 3 percent increase.

Total export realized as 553.885 units in the same period with a 14 percent increase, where the auto sales realized as 338.753 with an 11 percent increase.

#### Domestic sales increased by 5 percent

Automotive's export market share realized as 74 percent in the first 6 months whereas it realized as 76 percent in

June. Total automobile sales increased by 3 percent and foreign automobile sales increased by 5 percent.

In the light commercial vehicle segment, export market share realized as 47 percent in the first six months whereas it realized as 49 percent in June. Total light vehicle sales decreased by 4 percent where as the domestic light vehicle sales decreased by 11 percent.

Foreign light commercial vehicle sales increased by 5 percent. In this period, automotive export increased by 11 percent year on year and the light commercial vehicle export increased by 18 percent.

Tractor export in the same period realized as 7.531 units with a 9 percent increase. ■

9%

Total production increased by 9 percent year on year.

13%

Automobile production increased by 13 percent year on year.

725

THOUSAND UNITS

Total production realized as 725 thousand units, automobile production realized as 441 thousand units.





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**KUKA**

# Nothing stopped automotive export

# 11%

Sector's performance in the first six months of 2015 was realized as 12 billion 129 million USD where it increased by 11 percent and realized as 13.4 billion 462 million USD.

Uludağ Automotive Industry Exporters Union's (OIB) export realized as 1.7 billion USD with a 5 percent increase year on year. Automotive export to EU countries increased by 10 percent and realized as 1.3 billion USD in July, whereas it increased by 11 percent and realized as 13.4 billion USD.

**A**utomotive sector's export increased by 5,21 percent in spite of the troubles in the surrounding countries and 9 days of national vacation in July. When compared to 2015 July, when the export was 1.641.980 thousand USD, the export in 2016 July has reached to 727 million 573 thousand USD.

Sector's performance in the first six months of 2015 was realized as 12 billion 129 million USD

where it increased by 11 percent and realized as 13 billion 462 million USD.

According to the data gathered from Turkish Exporters Assembly (TIM) by Anadolu Agency, Turkish Automotive sector exported to 180 countries and autonomous regions and 12 free zones in the last 7 months.

Automotive became the leader of export by getting a 18,1 percent share of the total export, which realised as 80 billion 447 million USD with a 4,9 decrease.

Aytomotive was followed by Ready Made Garment and Textile with a 13,4 percent share and Chemicals and Chemical products with 10,7 percent share.

### Sector speed up in Europe.

US was the only country out of EU among the countries Turkey exported to.

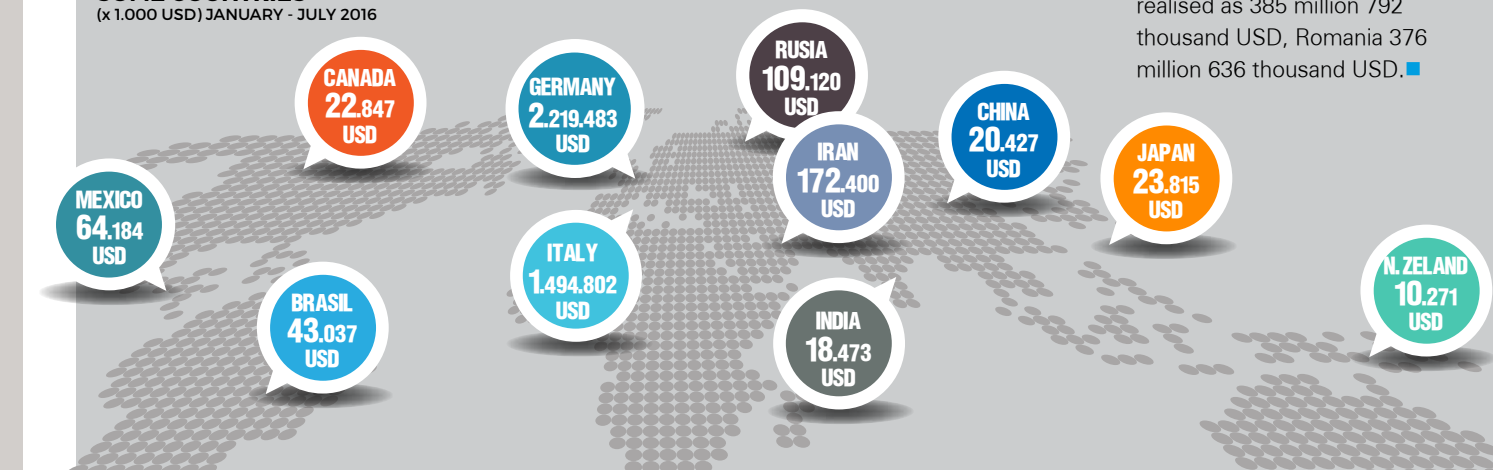
Automotive sector exported to Germany most in the first half of the year, which increased by 15,91 percent year on year and realised as 2 billion 219 million 483 thousand USD. Italy has been

the second country in export with 41,44 percent increase and realised as 1 billion 494 million 802 thousand USD. Italy was followed by England with 1 billion 366 million 956 thousand USD and France with 1 billion 355 million 63 thousand USD.

Within the mentioned period export to Spain was realised as 760 million 188 thousand USD; Belgium was realised as 538 million 521 thousand USD; Netherlands was realised as 472 million 366 thousand USD, Slovenia was realised as 387 million 688 thousand USD; US was realised as 385 million 792 thousand USD, Romania 376 million 636 thousand USD. ■

## AUTOMOTIVE EXPORTS MADE SOME COUNTRIES

(x 1.000 USD) JANUARY - JULY 2016



AUTOMOTIVE SECTOR IN JANUARY-JULY 2016 EXPORT VALUE USD				
Export	2015 USD	2016 USD	Change %	Share %
Supplier Industry	4.961.190.644	5.291.484.592	7	39,5
OEM	7.168.357.175	8.171.482.499	14	60,5
<b>Total</b>	<b>12.129.547.820</b>	<b>13.462.967.092</b>	<b>11</b>	<b>100</b>

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# TOFAŞ makes a substantial contribution to profitability of Europe

## TRANSFORMED INTO A GIANT FACILITY

Tofaş that had a manufacturing capacity for 20 thousand units in its foundation year and was a modest factory with approx. 600 employees has now turned into a "giant" with a manufacturing capacity of 400 thousand units and over 10,000 employees that develops and manufactures products simultaneously for 7 brands.

Cengiz Eroldu, CEO of Tofaş, said that production increased by 33% in the first half of the year compared to the same period of the last year and reached the highest production quantity in this period in the history of both Tofaş and Turkey with 182 thousand units.



**CENGİZ EROLDU**  
CEO OF TOFAŞ

**F**iat Egea Hatchback, a second compact class model of the project that was realized by Tofaş with \$1 billion investment is displayed in Fiat showrooms. Fiat Egea Hatchback, whose name is derived from Aegean Sea, hit the roads for the first time in Turkey in press test drive held last week in Bodrum.

Stating that they account for 25% of Turkish automotive manufacturing in the first 6 months of the year, Cengiz Eroldu stated that they increased their export share from 18% to 24%. Tofaş increased its exports by 54% in the first half of the year

compared to the last year and exported 134 thousand vehicles.

Expressing that Tofaş moved to 'the next level' with Egea Project, Eroldu reminds that they are in a period where they can sell as much as they produce and says that their engineers are seeking ways for increasing manufacturing by changing the processes in current circumstances.

Highlighting that they will not agree to the transport of available models to other factories despite occupied spaces and intensive labour in the factory, Eroldu, CEO of Tofaş, said "A customer

who comes to us never leaves us! We worked hard to be designated to these projects and thus, Turkish people will find a way. We will definitely find a way. Expressing that it is almost impossible to produce a new model in the existing factory, Eroldu says "We will re-evaluate the situation after increasing the capacity."

### Its value increased by \$1 billion

Noting that export market showed great interest in Egea/Tipo family and received higher demands than expected in every market where the products are promoted, Cengiz Eroldu, CEO of Tofaş, says "We got ahead of our foresights in Sedan sales in Europe. Three-month waiting period is in question. We expect serious demands from Hatchback and Station Wagon". Eroldu highlighted that the interest in Egea influenced the results of FCA (Fiat Chrysler Automobiles)

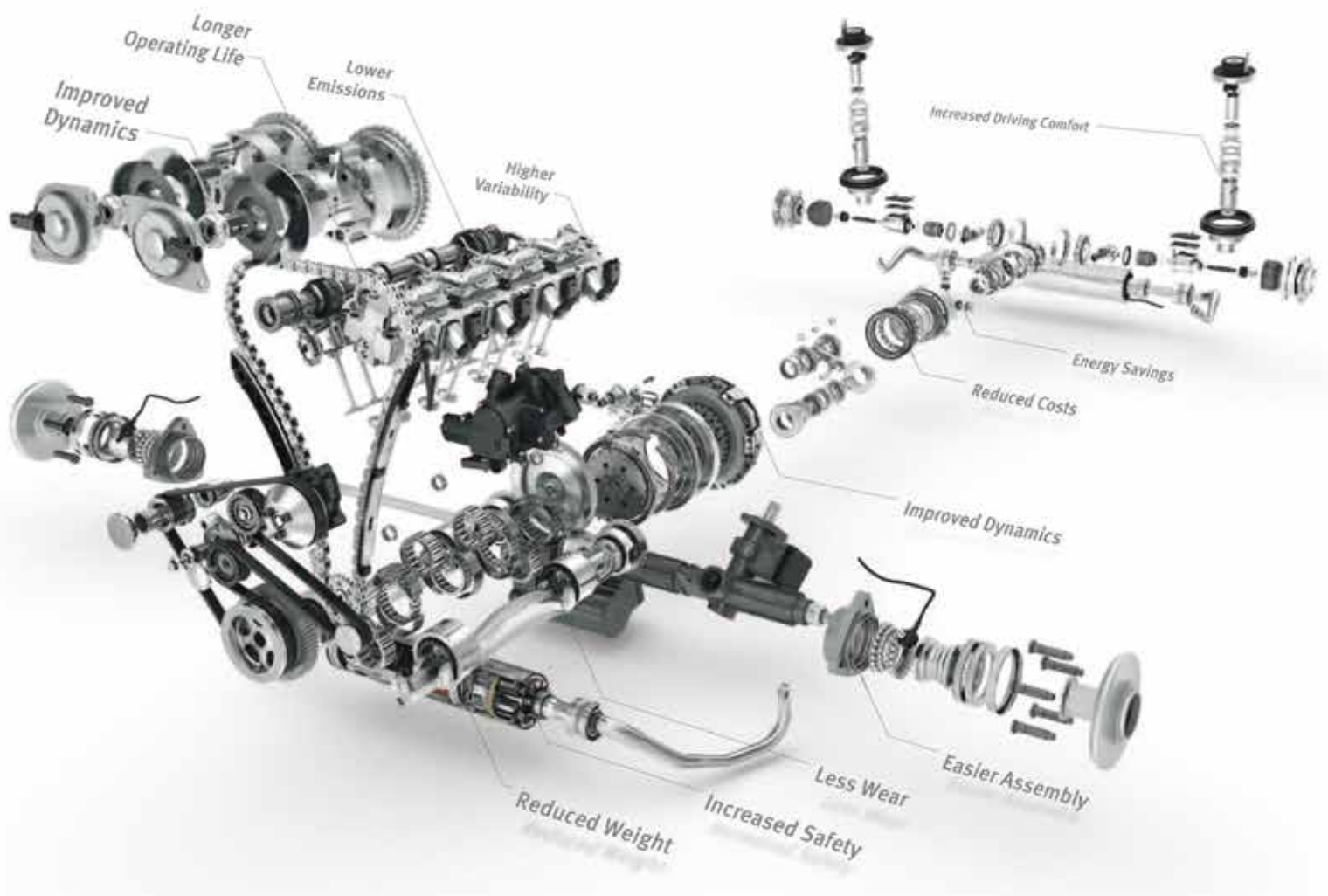
and especially built up the market share in Italy considerably. Fiat announced that its automobile sales in Europe increased by 13% and its light commercial vehicles increased by 16% in the first half of this year. Its revenue reached EUR 5.8 billion by 5% increase thanks to the launch of Tipo in the first half of the year and the increase in light commercial vehicle sales.

### Reached Mexico

Explaining that export of Egea to Mexico started 1 month ago under the title of Dodge Neon and put to sale in the mid-July, Eroldu says "It drew big attention in Mexico as well. The sales target in this market was doubled and increased to 6 thousand units". ■

### Tofaş factory is the production hub of Doblo in Europe

Noting that Tofaş continued its operations in partnership of Koç Holding and Fiat Chrysler Automobiles (FCA) and was heavily engaged in the assembly production until mid-90s, Cengiz Eroldu stressed that they initiated the first big export movement in 1995 with Tempra and R&D studies in 1994 pointed out to the beginning of a new era. He said that they started R&D studies after Customs Union in 1996 and became the sole hub of Doblo in Europe.



# Progress is a Matter of Detail

From the engine to the transmission to the chassis, our engineers analyze every detail of the automobile system. The many ideas we get from this analysis are translated into innovative products created by working closely with manufacturers. In everything we do, our main objective is to increase the performance, safety, and economy of today's automobiles.

Our ability to respond quickly to specific requirements is what makes us a renowned partner for the automobile industry. But it is our in-depth understanding of systems that has made us successful. That is why we will continue to focus on systems in the future – with uncompromising attention to detail.



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FAG

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# Venturesome move to abroad by Karsan that celebrates its 50th anniversary!

Celebrating its 50<sup>th</sup> anniversary and manufacturing modern public service and commercial vehicles to the needs of the present era aiming at both domestic market and exports in 2 factories in Bursa, Karsan acquired 5% shares of Industria Italiana Autobus (IIA) that manufactures under Menarinibus brand.

**A**cquiring 5% shares of Industria Italiana Autobus (IIA) that manufactures buses heavily for Italian market since 1919 and operating mainly under Menarinibus brand, Karsan added a new move to its visionary leaps. Karsan that entered into partnership with IIA and its brand Menarinibus, a well-established bus company that contributes to the development public service vehicles in Italia with over 30 thousand buses manufactured over 90 years aims at becoming one of the leading bus export companies in Europe and becoming a bus export company that aims the top in Turkey. Okan Baş, CEO of Karsan, says "We entered into partnership

with IIA, which we have already been cooperating with since 2010, by acquiring 5% shares of Menarinibus brand under IIA umbrella that we make exports to in Europe by assuming manufacturing and sales responsibility of it as well. To this context, both as Karsan and Menarinibus brands, we



**OKAN BAŞ**  
CEO OF KARSAN

## UNLIMITED TRANSPORT SOLUTIONS

It manufactures in Bursa with license H350 model panelvans of Hyundai Motor Company, minibuses and chassis trucks, Menarinibus buses and Karsan JEST, Karsan ATAK and Karsan STAR vehicles under its own brand.



### **Karsan is the Strategic Partner of Menarinibus in Turkey**

Karsan assumed exclusive responsibility for manufacturing, marketing, sales, after-sales services and export in Turkey of the entire product portfolio of Menarinibus in accordance with the agreement executed with Menarinibus, Italian bus manufacturer, on September 12th, 2010. Based on the executed strategic partnership agreement, Karsan started to make preparations for bus manufacturing in Akçalar factory at the end of October and got its first product from the line in January 2011 and then, made its first mass shipment to Italy to serve in public service in Rome.

believe that we will make an important leap both in manufacturing in Bursa and exports.

Expressing that Karsan is now more than ever ready to make an international presence by crossing the borders of Turkey both with its brand and as a

manufacturer, Okan Baş, CEO of Karsan, says "Turkey makes a global leap in every area of the automotive industry. In this period, as Karsan, we can make stronger and solid steps in Europe with our strategic partnership". Reminding us that they received orders for approx. 1100 products for Menarinibus brand since 2013, Baş highlighted that they had received orders until that time for around 100 products in 2016. ■

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## Sinan Özkök, General Manager of Nissan Turkey: ‘Those who know Turkey well continue their investments’

Evaluating the period after July 15<sup>th</sup>, Özkök, General Manager of Nissan Turkey says “Investors who know Turkey well continue their investments. There will not be any problem at this point” and notes that it is essential that the domestic market is revived.

Stating that investors who know Turkey and believe in its potential will continue their investments after recent events in Turkey, Sinan Özkök, General Manager of Nissan Turkey, stated that they showed remarkable efforts for preventing the market from dropping below 1 million this year, and steps for reviving internal dynamics should be taken.

Stressing that any negative impact was not encountered from brands that already have investments in Turkish automotive industry on their trust in the country or Turkish economy after July 15<sup>th</sup>, Özkök says “Quite the contrary, they want to make stronger investments in our country. In conclusion, there is no trouble here. However, some investors who have never visited Turkey and monitor our country from a distance and may include Turkey into their investment list may wait for a while”. Reminding us that investors who know Turkey well and

know its dynamics, including Nissan, are the majority, Özkök remarked “For example, we are in constant communication with Nissan Global since July 15<sup>th</sup>. We hold teleconferences every day and they always say ‘We support you. Do you need support? We’ll do whatever is necessary.’ Because Turkey is an important market”.

### ‘Movement is essential’

Stating that “economy

package full of good news” should be introduced in order to revive the economy, Özkök highlights that expectations were built up in consumers. Özkök says “We need to bring the old trend back to domestic automotive market. The introduction of economic package can result in a 10-15% growth in commercial vehicle market. Special consumption tax may also be applied to passenger cars. We can bring the old trend back to economy with discounts or improvements”.

### ‘A new record could be set’

Sinan Özkök, General Manager of Nissan Turkey, reminded that total market increased by 1.5% in the first half of the year and sales of

Nissan increased by 24% to 13,822 units. Noting that they are the brand showing the highest growth with their performance in June among the top 15, Özkök says “Our market share escalated to 3.2% with the contributions of Navara and Pulsar models. We closed the last year with 26,400 units in total whereas this year, we set as target 30 thousand units. We make revisions for the last 10 days since July 15<sup>th</sup>. We know that we could not attain the trend in the first half of the year in August-September. But if October, November and December exceed the figures in the last year, we can re-approach to the level of 28-30 thousand units”.

Noting that they envisaged that the sales would reach 1 million before these events, Özkök said a 7-8% market shrinkage will be seen compared to the last year if any support does not come and the year will end at best at the level of 900 thousand units. Expressing that they think a similar aggressiveness of the old campaign will start after September 15<sup>th</sup>, Özkök tells us “Although last year was the record year, we were still having a level above the last year in terms of production, export and domestic market. If the failed coup attempt had not occurred, a new record would have been set. Thus, this will not be a lost year for us”.

Sinan Özkök, General Manager of Nissan Turkey, stressed that any negative impact was not encountered from brands that already have investments in Turkish automotive industry on their trust in the country or Turkish economy after July 15<sup>th</sup> and he said “Quite the contrary, they want to make stronger investments in our country”.





A blue car body is shown on an automated assembly line. The car is positioned on a conveyor belt, and several robotic arms are visible, some of which are holding the car. The background is a bright, industrial setting with a high ceiling and structural beams. The overall scene conveys a sense of modern, high-tech manufacturing.

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# TEMSA increased its export by 158 percent in the first 6 months

TEMSA increased its export by 158 percent in the first six months while getting a share of 32 percent in domestic market with 980 units of sales. General Manager Dinçer Çelik stated that they will produce smart products in smart factories with Smart 2020 programme.

**D**inçer Çelik stated that 2016 was a challenging year and a 31 percent of decrease took place in bus segment in the first 7 months of 2016 when compared to 2015. Çelik added that travel bus market has reached to 801 units of sales by the end of July 2016. Dinçer Çelik said: There has been a 18 percent decrease in travel bus market when compared to 2015. In this market TEMSA got a 45 percent market share with 203 units of Safir sales and 36 percent market share with 85 units of Maraton sales in all intercity travels. Dinçer Çelik pointed out the fact that the highest shrinkage realized in midibus segment and said: A 41 percent shrinkage realized with 1655 units of sales when compared to 2015. As of July 2016, we sold 491 units of Prestij SX. Midibus

segment is composed of 27-29 pax busses which also include Prestij and it got a 46 percent of market share in its own segment, 35 percent of market share in whole

midibus segment with Prestij City.

Çelik stated that TEMSA reached to 43 percent with Tourmalin, which was produced to be used in short distance and service field and added: Here we have 54 units of sales. TEMSA has a 43 percent of market share here with 23 units of sales. Additionally TEMSA sold 87 inner city bus sales.



**DİNÇER ÇELİK**  
**TEMSA GENERAL**  
**MANAGER**

TEMSA's technology programmes developed with Smart Mobility vision develops solutions for 0 emission electric vehicles, smart vehicles that decrease fuel consumption and emission by 10 percent and future needs of Smart Transportation Systems and smart traffic applications that decreases traffic jam by 20 percent and accidents by 25 percent.

in the first six months of 2015, which increased to 62,6 MUSD by 158 percent increase in 2016.

## 10 Dealership and 81 Service Points

Dinçer Çelik explained TEMSA's secret to success as hardwork and having a good team and said: From time to time I say we listen to the field and actualize the demands quickly. Yes, TEMSA's current position proves that.

However, I should remind that you need a good team in order to listen to the field and meet the demands quickly. Temsa has a team composed of more than 1500 workers, 170 engineers, 30 sales teams, 10 dealership and 81 service points.

These figures from production to sales and aftersales I have been telling about is because of this team. We will continue to increase our achievements and provide added value to our country. ■

## Exports to 66 countries

Dinçer indicated that they have increased their export levels and continued: We export to 66 countries, which includes France with upto 5000 units and US with upto 1000 units. Our export realized as 24,3 MUSD

## Smart cars will reduce the accidents by 20 percent

Dinçer Çelik said that they have started SMART 2020 program in order to manufacture smart products in smart factories and said: SMART 202 program includes big data, 3d printers, robotic assembly, smart storage systems, visual factory, smart stock and smart equipments.

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Automotive Manufacturers Association Chairman of the Board

**KUDRET ÖNEN:**

## “Transforming the sector: From production to innovation, R&D and design”



**T**he automotive industry is the driving force of the manufacturing industry and exports of Turkey.

The automotive industry has today a production capacity of 1.75 million units thanks to the implementation of new projects and the capacity investments in the last 5 years. About 50,000 people are employed directly in the industry while the multiplier effect brings the total employment in the value chain to approximately 500,000 people.

In 2015, automotive exports registered a 12% increase in terms of units exported while the value of exports in Euro rose by 14%. Our total production increased by 16% to 1.359 Million units, thus marking best ever production and exports numbers in 2015.

With the 2015 production, Turkey has become the 15th biggest automotive manufacturer worldwide, while it is the 5th largest manufacturer in the EU, occupying the 1st rank for bus and commercial vehicle production, 2nd rank for truck production and 7th place for passenger cars production.

The automotive industry, which exports 76% of the vehicles manufactured, is also the leading exporter in Turkey, representing 17% of the total exports of Turkey, in first half of 2016. Vehicles manufactured in Turkey are exported more than 180 countries around the world.

With the investment made in recent years in production capacity, new models

and R&D and engineering, Turkey’s automotive industry has become an international competence center, marking the competitiveness and quality strength of the in the global markets

The R&D incentives provided by the government to help the automotive industry become an R&D center for the global automotive brands contributed fundamentally to the development of engineering capacity of the industry. R&D employment increased by 90% and the number of patent applications by 207% between 2010 and 2014. The R&D in

automotive industry represents 18.9% of the total R&D expenditure in Turkey, making her the third country in automotive related R&D spent after Germany with a share of 31.7% and Japan with a share of 19.8%.

### R&D CENTER FOR GLOBAL BRANDS

We firmly believe that the automotive industry in Turkey has a very promising and bright future and will continue to invest to maintain and strengthen our position of being an international production and R&D center for global brands.

We firmly believe that the automotive industry in Turkey has a very promising and bright future and will continue to invest to maintain and strengthen our position of being an international production and R&D center for global brands.

With the investments being made in new models and capacity increase, we estimate that the capacity of our industry will reach 1.85 million units at the end of 2016. We foresee that the exports will exceed the threshold of 1 million and reach 1.1 million units while the total production will reach over 1.45 million in 2016. ■

# Ege Endüstri



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Uludag Automotive Industry Exporters' Association Chairman of the Board

**ORHAN SABUNCU:**

# “Automotive OEMs and suppliers drive Turkish economy”



## Turkish Automotive Industry

The automotive OEMs and supplier industries in Turkey are major drivers of the economy. The largest commercial vehicle manufacturer of Europe and 15th largest motor vehicle manufacturer in the world, Turkish automotive industry consists of a main industry, which produces motor vehicles, and a supplier industry, which manufactures components, parts, modules and systems fitting these vehicles.

Turkey, produced 1 million 359 thousand vehicles in 2015 and 73 % of this production was exported to 200 countries all over the world. The sector has become the export champion of the country for the 10th consecutive time by realizing 21.2 billion USD export. 2015 has also been the year where sector's production and domestic sales numbers hit record levels. Briefly, 2015 has been truly a golden year for the Turkish automotive industry.

Turkey is also playing an increasingly important role in the supplier industry as an exporter and manufacturer. Turkish Automotive Supplier Industry produces almost all parts and components of the sector. The USD 8,6 billion supplier industry export figure for 2015 makes up 40,5% of the total automotive export and 6,0 % of the total country export. Along with local manufacturers with nearly 40 years of experience in the automotive supplier industry, there are also world brands that have significant investments in Turkey. Our supplier industry companies had a chance to become a “co-designer” of the main industry companies for global production. This allowed them to reach a prominent phase with their long years of experience and know-how.

Turkish automotive industry aims to generate export revenue of USD 75 billion

### THE TARGET OF THE INDUSTRY

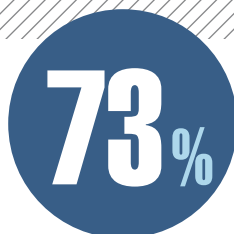
Turkish automotive industry aims to generate export revenue of USD 75 billion by producing four million vehicles, exporting three million vehicles and through automotive supplier industry in the year of 2023.

by producing four million vehicles, exporting three million vehicles and through automotive supplier industry in the year of 2023. To achieve these targets, we should be able to attract large-scale automotive investments to our country and also produce high value-added vehicles, parts and components.

We need high-tech, innovative products with a high value-added to gain a competitive edge in today's fierce environment. In line with this understanding, Turkish automotive industry intends to transform its production-oriented position into an innovation, R&D and design-oriented one. The way to put more weight into high added value products in exports is R&D and innovation. So our automotive industry should develop original, high value-added and high-tech products to achieve its future targets.

### Uludag Automotive Industry Exporters' Association (OIB)

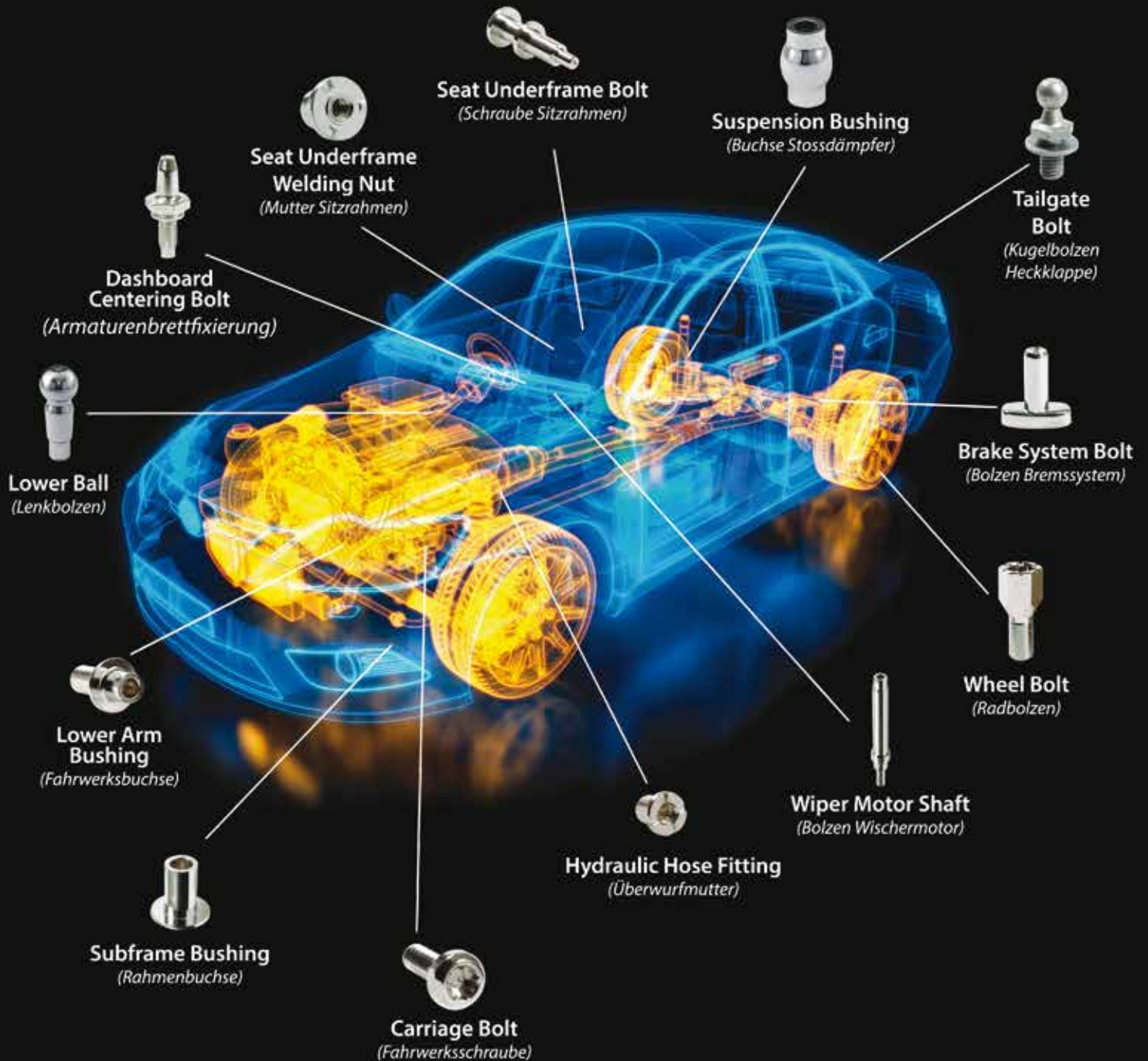
The Uludag Automotive Industry Exporters' Association (OIB) was formed in 1991 under the title of Uludag Vehicle and Auxiliary Industry Exporters' Association with 246 members and exports of \$163 million under the umbrella of the Uludag Exporters' Association (UIB). As of 2015, OIB has 2.638 active memberships and it is the sole export representative of the automotive industry, the locomotive of the country's total exports. All exporting main and supplier industry companies in the automotive sector in Turkey are members of OIB, which is a union of coordination for automotive sector exporters. ■



**EXPORTED TO 200 COUNTRIES**

*Turkey, produced 1 million 359 thousand vehicles in 2015 and 73 % of this production was exported to 200 countries all over the world.*

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Automotive Distributers' Association Chairman of the Board

**MUSTAFA BAYRAKTAR:**

# “Innovation is needed for a stronger automotive sector”



In January-June period of 2016, total market of Turkey's automotive sector decreased by %0.9 compared to the same period of the previous year, to 450.997; the production increased by %8.7, to 725.477 and the export increased by %13.9, to 553.885. Export value increased by %11.4 and reached 11 billion 913 million dollars.

In the first half of 2016, Turkey's passenger car and light commercial vehicle total market increased by %1.45 compared to the same period of the previous year, to 438.817. In the first six months of 2016, while passenger car sales increased by %3.24 compared to the same period of the previous year, to 338.482, light commercial vehicle market decreased by %4.17, to 100.335 in the same period.

The production journey started in 1960s with commercial vehicle production in our country continued with the effort of developing competitiveness in the glo-

balised world after technology and capacity investments including passenger car production in 1970s. The development of the sector caused legal framework and developed the parallel regulations with the EU. After Customs Union, our sector completed the adaptation of technical regulations on a large scale and became the most prepared sector for the European Union.

Created out of nothing, the automotive sector that is on the boil because of its contributions to the country's economy in value chain has a well-earned title which is “the leading sector” while it stands in a very valuable position in our country due to the export values created with both main and supplier industries, domestic market figure reached and employment it provided.

## EMPLOYMENT OF 500 THOUSAND PEOPLE

Along with the value-added that the automotive industry provides to the economy, we have to underline that it creates an employment of 500 thousand people, that it leads technologies aimed at today's needs and its sensitive approach for the environment.

As a primary customer of different sectors such as iron-steel sector and petroleum chemical sector, automotive sector has important responses to the country's whole economy.

Along with the value-added that the automotive industry provides to the economy, we have to underline that it creates an employment of 500 thousand people, that it leads technologies aimed at today's needs and its sensitive approach for the environment.

Automotive sector has also reached a certain market rhythm since 2003; past years' fragility and sensitive structure gave way to a steadier, fast responsive, more proactive and stronger market structure.

When we look at countries at the po-





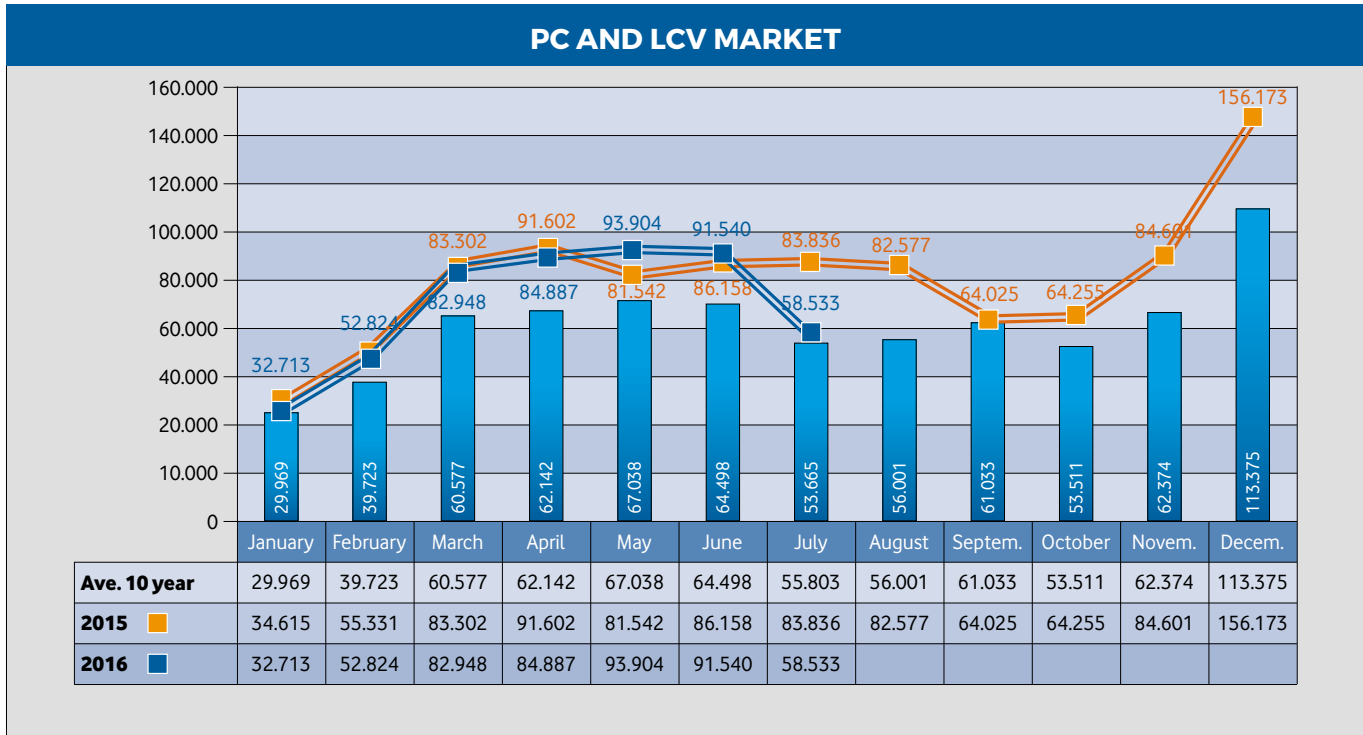
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sition of “global player” for production such as US, Japan, Germany, France and Korea, we can see that their domestic markets have very big market figures. It will be possible for Turkey’s automotive sector that gets strength from a big domestic market to secure its position more in global competitiveness.

As a whole, production, export and the extent of the domestic market is of capital importance for the competitiveness of our sector in the global arena. Our country has an important logistic superiority because of its geographical position as well and the present logistic substructure should sustain its development with supporting the production and export in the future and continuing to respond the aims of our sector. At the same time, there must be steps taken to support new investments to our country.

Automotive sector is in an important transformation in the global arena. While automotive production shifts from west to east, it is important for Turkey to take a share from these developments and to widen its area. It is good for us to examine the new trends in the global auto-

motive industry closely to preserve and strengthen Turkey’s position in forward projections. Innovation should be supported certainly for a stronger automotive sector. Contribution of the public is also important in this sense.

In conclusion, the monetary policy that is going to be followed by U.S. Federal Reserve Bank (FED) depending on the economic progress, political and economic progress in EU after Brexit, the monetary policy that is going to be followed by European Central

Bank (ECB) in parallel with economic progress in EU, developments in China and their influence on developing countries, improvement in inflation and current account deficit in Turkey, geopolitical developments, steps that are going to be taken in respect of structural reforms, improvement and growth rates of economic activity will be decisive in the second half of 2016.

In the light of these indicators, it is foreseen that the total market of the automotive sector figure will be between 950 thousand and 1 million in 2016. ■

**LOGISTIC SUPERIORITY**

Our country has an important logistic superiority because of its geographical position as well and the present logistic substructure should sustain its development with supporting the production and export in the future and continuing to respond the aims of our sector.



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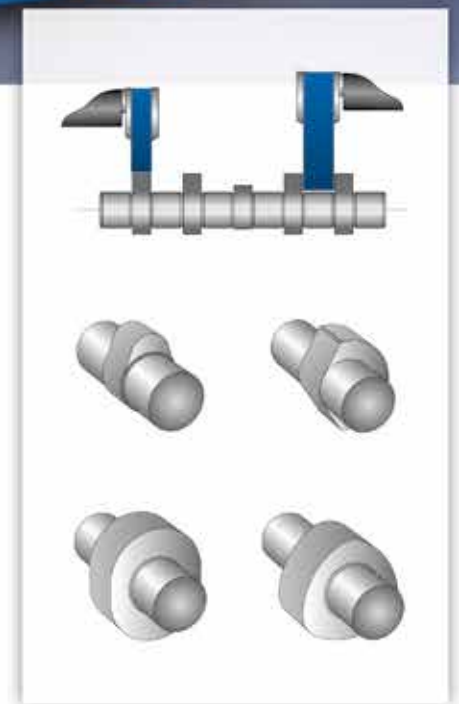
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## Z. ALP GÜLAN:

# “Change is coming: the new mobility requires you to be determined and think out of the box in order to survive”



**A**utomotive industry that holds first place in exports of Turkey for the last 10 years is one of the main actors of our country's economy. Our industry recording 21.2 billion USD of export in 2015 carries advantages and experience gained from R&D investments to the export. Automotive is the industry that has the most R&D centres of 76 among 253 in total. Turkish automotive industry has become one of the leading forces of Turkey's economy in recent years. Today, our production capacity has reached to 1.8 million units with 18 production plants and as of 2015 Turkey has been the world's 15th biggest manufacturer by rising two levels.

Turkish automotive sector produced 1 million 359 thousand vehicles in 2015, export was 992.000 and made a sales of 1 million 11 thousand vehicles in the domestic market, including heavy vehicles. Briefly, in 2015 the record of all times was broken in terms of production, sales

and exports. Automotive sector also made a trade surplus of 15 billion USD between the years 2006 and 2015 and I would like to say that this is quite a valuable case. Also, in addition to providing technology with the advantage of tax and job creation that we provide industrially, we also provide export surplus in foreign trade and this gives us a hope that the government will do some works with a positive outlook to the sector and with this work industry will get rid of its problems.

In the first half of this year, production increased by 9%, export increased by 14%, we reached to an export figure of 11.9 billion USD numerically.

Today, our automotive industry is a valu-

### STRATEGIC POSITION

Today, our automotive industry is a valuable production center that has a quality production in the world, a strong sub industry and very strategic position. As sector's stakeholders, we see that there will be significant changes in automotive industry in very near future.

able production center that has a quality production in the world, a strong sub industry and very strategic position. As sector's stakeholders, we see that there will be significant changes in automotive industry in very near future. Of course, in

terms of production and export, we should focus on production of vehicles with high added value and production and export of advanced technology parts belong to them. We are all now following closely, automotive industry has been in a rapid transformation in the world.

Cars of the future will be more compact, electric driven, consisting of several hundred pieces, mainly software based, without instrument panel. Widespread





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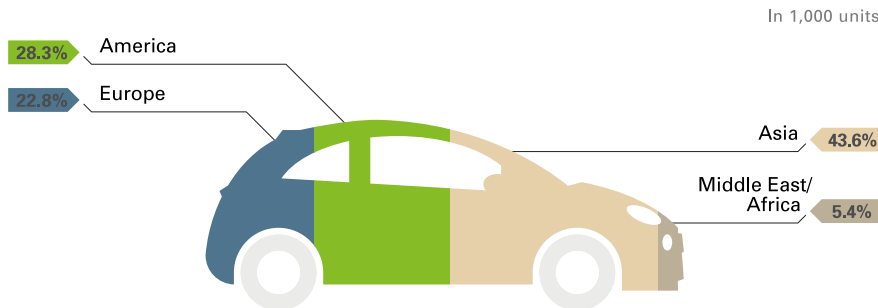
World new passenger car registrations

MARKET SHARES / 2015

Passenger cars	2015	2014	% chan. 15/14	% share 2015
EUROPE	16,672	16,270	2.5	22.8
EU <sup>1</sup>	13,714	12,551	9.3	18.7
EFTA	488	456	7.2	0.7
Russia	1,495	2,327	-35.8	2.0
Turkey	726	587	23.5	1.0
Ukraine	43	91	-52.4	0.1
Others: Europe	206	257	-20.0	0.3
AMERICA	20,714	20,630	0.4	28.3
North America <sup>2</sup>	17,170	16,282	5.5	23.5
of which the US	14,506	13,842	4.8	19.8
South America	3,544	4,348	-18.5	4.8
of which Brazil	2,125	2,801	-24.1	2.9
ASIA	31,888	30,376	5.0	43.6
China	19,717	18,071	9.1	26.9
Japan	4,209	4,693	-10.3	5.7
India	2,823	2,601	8.6	3.9
South Korea	1,526	1,365	11.8	2.1
Others: Asia	3,612	3,646	-0.9	4.9
MIDDLE EAST/AFRICA	3,937	4,084	-3.6	5.4
WORLD	73,210	71,360	2.6	100.0

SOURCE: ACEA, IHS

1. Data for Malta n.a.  
2. Based on production type



73.2 million cars were registered worldwide in 2015

WWW.ACEA.BE

use of autonomous vehicles will bring changes in many areas from health to insurance, from dealership to finance, from media to public transport and taxation. The value of the vehicles will be determined by high-tech software, not by the standard and optional equipments, people's control over the vehicles will gradually decline.

In order to shed light on the technological developments of authorized dealers that we represent as Oyder, we handled the issue "Digitalization" in our Congress, which is held as 6th this year. We discussed the future of the industry with distinguished guests from Brazil, Norway,

Germany, Italy, USA and Spain. It has become very important for the future of our business to follow new trends in the world and development of technology at an unprecedented pace began to change the direction of industry, services and trade. On the one hand electric and hybrid vehicles and on the other side autonomous vehicles are the most important elements of this change.

Significant investments also continue to overcome handicaps in the range and the charging time of electric vehicles. We can say that hybrid vehicles represent a transitional period. The industry that has been working on the development

of electric vehicle for many years is currently preparing to launch autonomous vehicles. This change on dealers side will cause significant changes in maintenance operations and damage services with the spread of autonomous vehicles as well as electric vehicles. It will be more difficult to find the same business potential in services in the future, which are an important element for dealerships nowadays and significant revenue losses may arise, this change will have a significant impact on the business and profitability of dealership.

The need for vehicle buyers to visit showrooms will decrease in the coming period and vehicle purchasing patterns will vary as compared today. Buyers meet their various needs through virtual sites today and they can also buy, rent and share cars in this way in near future. Vehicles will be produced with simpler and fewer components, break down less often and need of part replacement will be reduced, will be fitted with simple electrical drives with fewer moving parts.

They will not have display screens, all transactions will be able to be followed through via mobile phone or tablet PCs by integrating them on their vehicles as got on the vehicle. Periodic maintenance durations will extend, there will be no need to change oil etc therefore business models in service will also undergo radical changes. The ones who are aware of finding a way to exist in the new Mobility world of traditional dealership structures should be determined and need ideas beyond the present day perspective to overcome the gloomy road ahead.

Therefore, it has a great importance that automotive sector should read this transformation good and to take steps in this direction rapidly. Since information and software technologies will increasingly replace the mechanical technology development, our industry will start to invest in these areas. Of course, the industries that could not develop in this area will lose competitiveness in a short time and leave the stage. Since our automotive and sub industries are aware of these developments, they perform such investments as R&D by the support of government too. I trust our industrialists, engineers and automotive veterans, believe that our country will be stronger in this area. ■



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Prime Ministry Investment Support and Promotion Agency of Turkey President

**S. ARDA ERMUT:**

**“Turkey awaits investors with a qualified work force, a developed infrastructure, a stable economy and a reformist investment climate”**



**E**stablished in 2006 as an important component of the improving investment environment in Turkey, the Investment Support and Promotion Agency of Turkey (ISPAT) is directly attached to the Prime Minister’s office and provides investors with assistance before, during, and after their entry into Turkey. ISPAT’s free-of-charge services include, but are not limited to, providing market information and analyses, site selection, coordination with the relevant governmental institutions, facilitating legal procedures, and preparing industry overviews and comprehensive sector reports.

The automotive sector is one of the prioritized industries ISPAT has been focusing on based on Turkey’s competitive advantages. After identifying automotive as a target sector, we then identified the geographic source of investments and have allocated our resources to countries such as Germany, Japan, US, France, and South Korea, which are the key source co-

untries of greenfield investments in the automotive sector.

The foundations of Turkey’s automotive industry date back to the early 1960s. During a period of rapid industrialization and progress, this key sector transformed itself from assembly-based partnerships to a full-fledged industry with design capability and massive production capacity.

Between 2000 and 2015, original equipment manufacturers (OEM) invested around USD 14 billion in their operations in Turkey. These investments significantly developed their manufacturing capabilities, which in turn led to Turkey becoming an important part of the global value chain of international OEMs. Meeting and exceeding international quality and sa-

**900,000  
VEHICLES WERE EXPORTED**

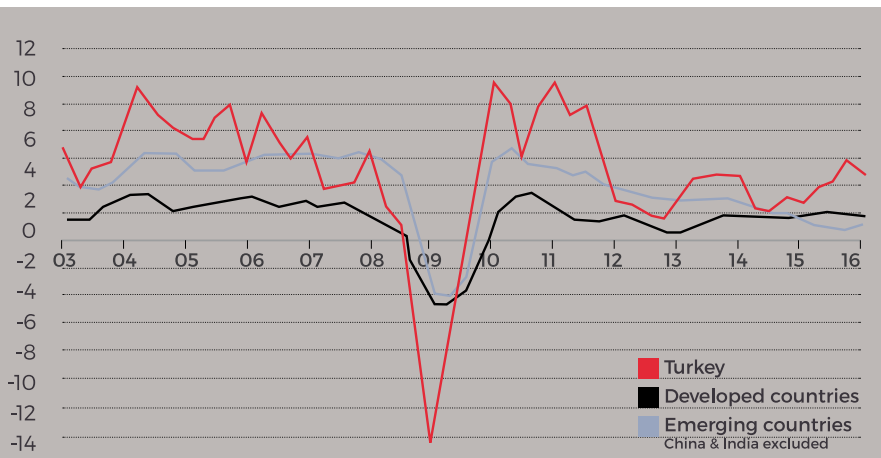
Auto manufacturers are increasingly choosing Turkey as a production base for their export sales. This is evidenced by the fact that around 75 percent of production in Turkey is destined for foreign markets. In 2015, more than 900,000 vehicles were exported from Turkey to foreign markets.

fety standards, today’s Turkish automotive industry is highly efficient and competitive thanks to value-added production.

In Turkey there are currently 13 OEMs. Using a competitive and highly-skilled workforce combined with a

dynamic local market and favorable geographical location as leverage, the vehicle production of these global OEMs in Turkey increased from 374,000 units in 2002 to over 1.3 million units in 2015. This represents a compound annual growth rate (CAGR) of around 10 percent during that period and this led to Turkey becoming 15th in the world and 5th largest automotive manufacturer in Europe by the end of 2015. In addition to this, Turkey was the number one producer of light commercial vehicles (LCV) in Europe during that same period.

**GLOBAL GROWTH RATES (%)**  
Turkey outperforms both developed & emerging countries



Source: CBRT



# CARS ARE **HAPPY** WITH TEKNO!

**T** *Tekno Kauçuk, the leader manufacturer & designer of Rubber Parts for Automotive industry exceeds its customers' expectations and satisfactions By continuous development and innovation accordance with its vision.*



Proven as a production hub of excellence, the Turkish automotive industry is now aiming at improving its R&D, design, and branding capabilities. As of the end of 2015, 75 R&D centers belonging to automotive manufacturers/suppliers were operational in Turkey. Notable examples of global brands with product development, design, and engineering activities in Turkey include Ford, Fiat, Daimler, AVL, and Segula. Ford Otosan's R&D center is one of Ford's three largest global R&D centers, while Fiat's R&D center in Bursa is the Italian company's only center serving the European market outside its home country. Meanwhile, Daimler's R&D center in Istanbul complements the German company's truck and bus manufacturing operations in Turkey.

Auto manufacturers are increasingly choosing Turkey as a production base for their export sales. This is evidenced by the fact that around 75 percent of pro-

**4.8%**

**GROWTH RATE IN Q1 OF 2016**

**2<sup>nd</sup>**

**FASTEST GROWING COUNTRY IN OECD**

**4<sup>th</sup>**

**FASTEST GROWING MEMBER IN G20**

duction in Turkey is destined for foreign markets. In 2015, more than 900,000 vehicles were exported from Turkey to foreign markets. While Germany, France, Italy, the UK, and Spain are currently the major export customers of the Turkish automotive industry, there is a trend of

diversification in export destinations with companies looking to break into nearby emerging countries where there is considerably more demand potential for new auto sales.

Turkey is the 17th largest economy in the world, and would be the 6th largest in the EU. It has been able to retain sound macroeconomic fundamentals thanks to supportive policies. Key targets such as a higher growth rate, strong domestic demand, a more moderate current account deficit, lower interest rates, and a higher amount of foreign direct investments (FDI) have been achieved. Our country has ambitious targets set by our President Recep Tayyip Erdoğan to become a stronger global actor and one of the top 10 economies in the world by 2023. Thanks to the encouraging motivation the economy has posted an annual average real GDP growth rate of 4.7 percent over the last fourteen years, while GDP per capita has more than tripled. The rise of per capita income from USD 3,000 in the first few years of the 2000s to USD 10,000 in 2015 led to higher sales in the motor

**70 %**

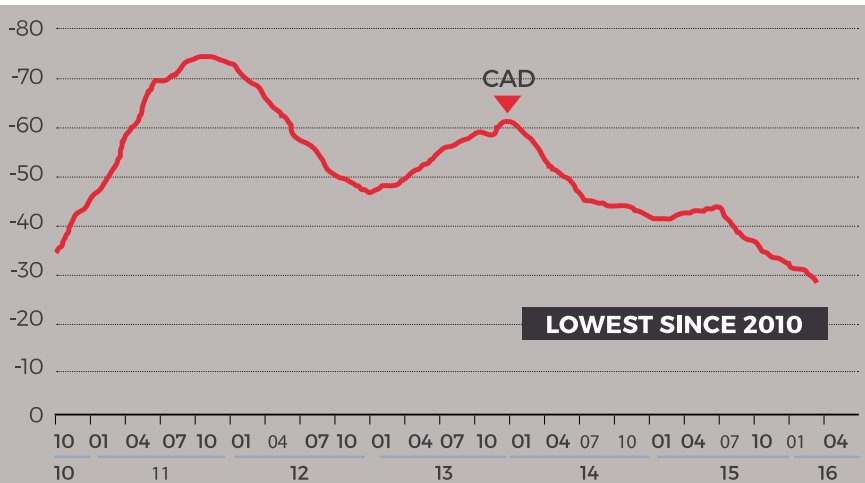
**SHARE OF PRIVATE CONSUMPTION IN GDP Q1/2016**

**6.9%**

**RISE IN HOUSEHOLD CONSUMPTION IN Q1/2016**



**CURRENT ACCOUNT BALANCE TRY BILLION (12-month rolling)**



Source: CBRT

vehicles market. While the average annual sale figures in the market were around 360,000 in the early 2000s, it increased to 870,000 by 2015.

With modern management practices, a young and qualified work force, a stable economy, a reformist investment climate, developed infrastructure, a central location with easy access to 1.5 billion customers in the region, low taxes, generous incentives, and a sizeable domestic market, Turkey awaits investors with all the opportunities it has to offer. ■



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Create the future



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Profile C [EN 10092-1]



Spring Steel Flat Bars  
Profile B [EN 10092-1]



Spring Steel Flat Bars  
Profile A [EN 10092-1]



Peeled Round Bars  
Ø13-80 mm [EN 10278]



Round Bars  
Ø15-100 mm [EN 10080]

# TURKISH AUTOMOTIVE INDUSTRY

## RANKING OF TURKISH AUTOMOTIVE INDUSTRY



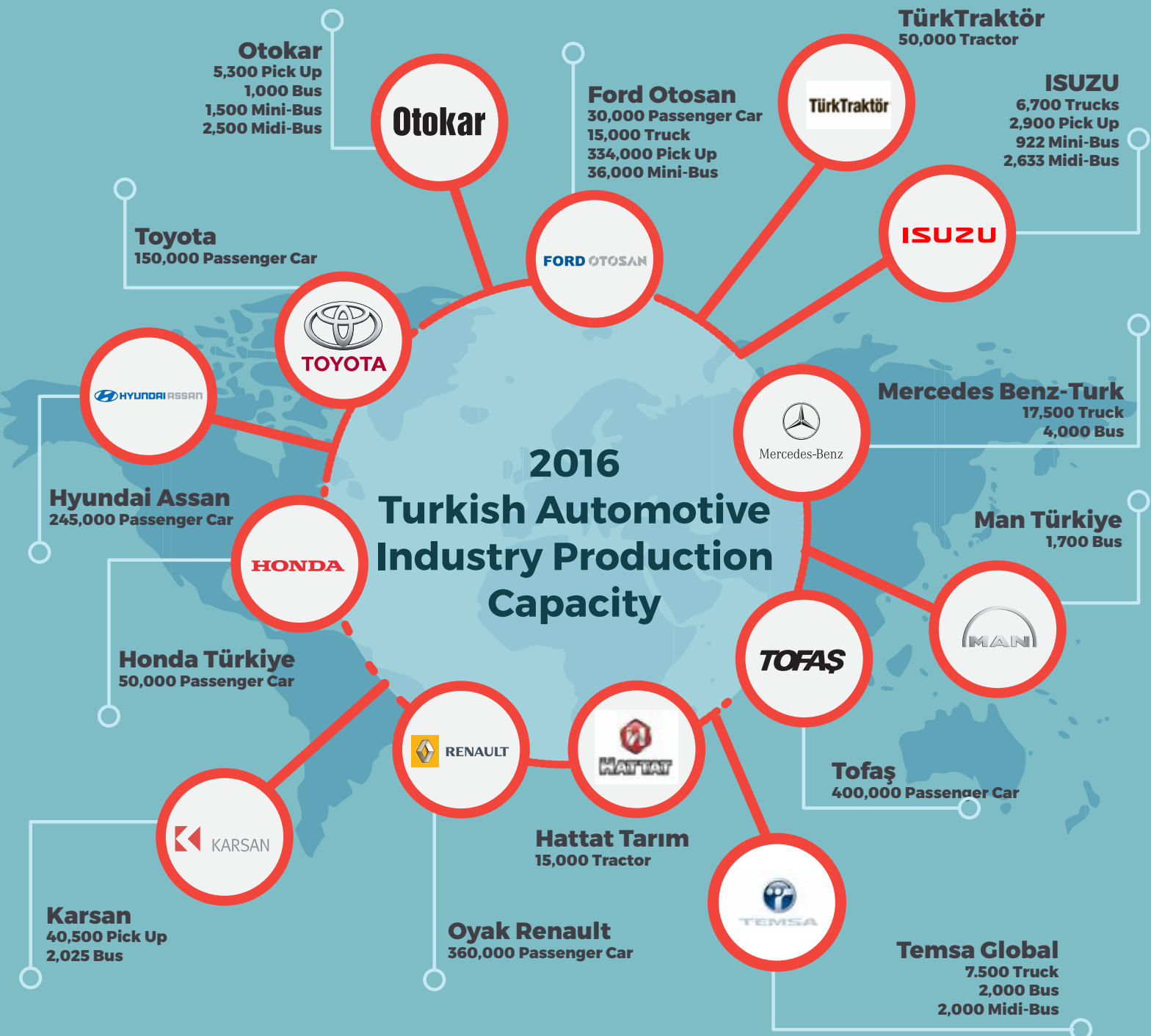
LCV and Bus  
Production 1<sup>st</sup> in EU

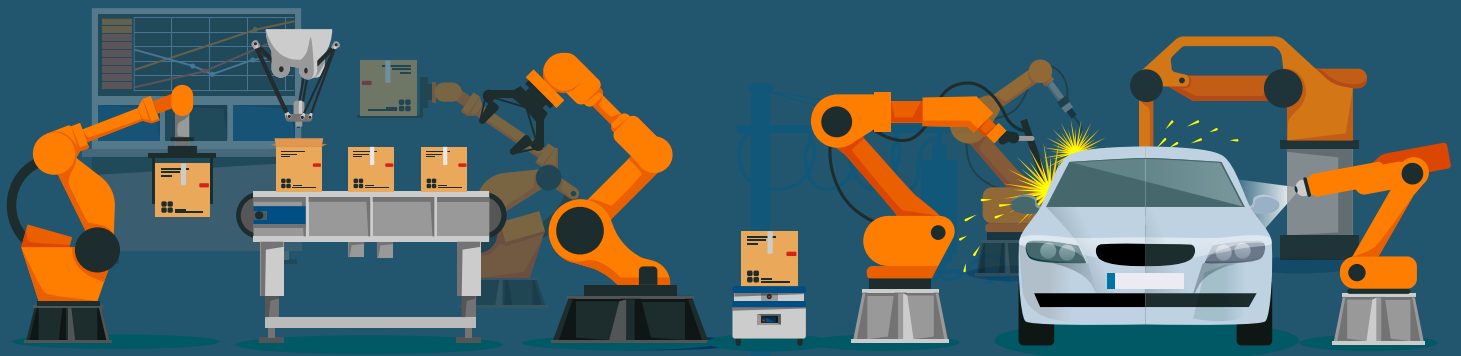


PC Production  
7<sup>st</sup> in EU

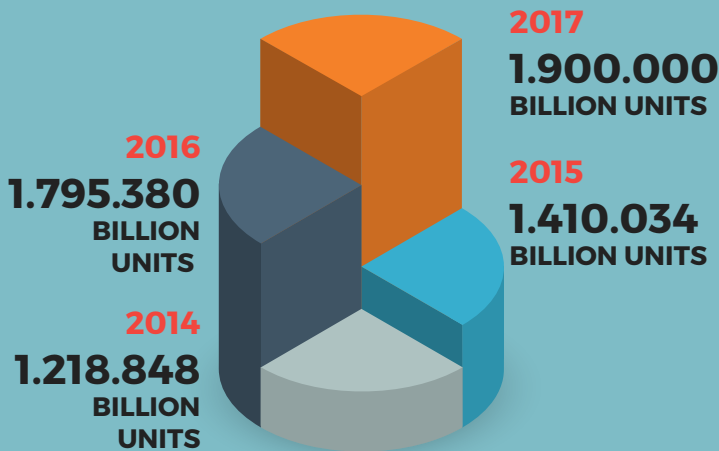


Total Production  
15<sup>th</sup> in Global





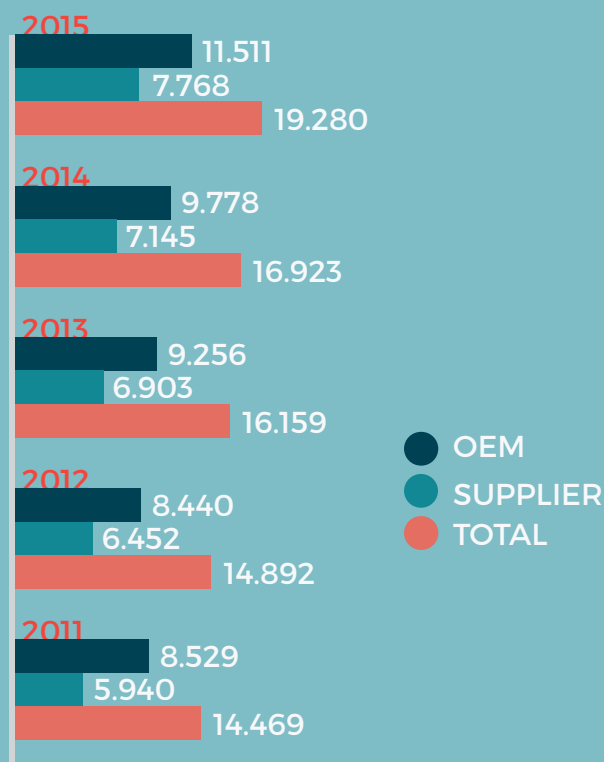
## AUTOMOTIVE INDUSTRY PRODUCTION CAPACITIES



**TARGET  
LEADING AUTOMOTIVE  
CLUSTER**

Production and capacities announced exceeded expectations. The vast majority of executives expect an increase in production. They are almost sure that production will exceed 1.4 million from 1.2 (base year 2014) and capacity will exceed 1.9 million from 1.7 million. However, things progressed more rapidly and exceeded the expectations. With the announcements from Toyota, Mercedes, Tofaş and Ford at the beginning of 2016, it became certain that the production and capacity will exceed the expectations.

## OEM & SUPPLIER INDUSTRY EXPORTS (x Million Euro)



## THE POWER OF TURKISH AUTOMOTIVE INDUSTRY

- 1 Compliance with EU, Customs Union and Global Regulations
- 2 Proximity to European markets
- 3 Competitive and strong supply chain structure
- 4 High production quality
- 5 Flexible manufacturing capability
- 6 Expert in international quality systems,
- 7 Well educated, young and dynamic workforce,
- 8 Fast adaptation to the rapid changes

## “We owe our success to the people of this country”

TAMER TAŞKIN

**CHAIRMAN OF  
PETROFER TURKEY**

**W**e have been manufacturing our products for Turkish manufacturing industry and 40 other countries in the Middle East, Africa, Turkish Republics and the Balkans for 35 years in Turkish market and for 20 years in our factory located in Izmir.

We are experienced enough to go through these times since we experienced such bad times several times before. Now, it's all in the past and Turkish industry showed a remarkable success and achieved its current position. No doubt,

economy and political stability are two “musts” for attracting foreign investors to our country. We are confident that Turkish Industry will bounce again as of September once the political atmosphere cools down.

Despite all political and economic problems in Turkey and in the neighbouring countries, our company grew by 20% since the New Year due to our successful sales works. We are a company that achieved 100% growth in the last four years. We owe this success to our well-educated and valuable Turkish team and customers. Price, shipment and quality are factors that must exist by nature and thus, do not need to be discussed. I am proud to say that our German part-



ners should not have any doubt about our factory nor Turkey. We continue our manufacturing operations as the most successful factory among 12 factories around the world. ■

## “Turkey will continue to grow by overcoming this period swiftly”

ŞÜKRÜ ERDEM

**GENERAL MANAGER OF  
LEONI CABLE TURKEY**

**S**ector players who are focused heavily in Bursa and Kocaeli within Marmara Region where labour and logistics services are strong make great contributions to national economy by growing continuously with new investments in automo-

biles, buses, light commercial vehicles, truck factories and their supply industries. In addition to incentives, investments of foreign investors should be supported with permanent and constructive laws and confidence in country should be ensured especially in our country that is passing through a strategic process.

Foreign investors, in particular, were discouraged as a result of past amendments to Free Zone laws. When various incentives and regulations are discussed, what is expected from foreign capital and

expectations of foreign capital should be evaluated well in order to avoid making the same mistakes. Foreign investors from global brands who are closely familiar with Turkey continue their investments in Turkey following the failed coup attempt even if they are prudent. Domestic market and local investors and supply industry should also be supported in this environment. I think that it is important to make environment of confidence permanent both in terms of local and foreign investors.

## “Our confidence and loyalty to the development of Turkey continue”

CIHAN ELBİRLİK

**İNCI GS YUASA**  
**MANAGING DIRECTOR**

**T**urkey closed its budget with an excess of 1.1 billion TL in the first half of 2016. I think that Turkey will maintain its economic development in the second half of the year with its \$12,922 million export and \$19,340 million import volume.

Turkey has a crucial position for business investments in view of its young population and policies encouraging production. It is especially a favourable location for managing operations in Europe, Russia and the Middle East. However, it is our responsibility to shift toward products

with high added value; increase the share of R&D in turnover for attracting more investments in this field; raise competent human resources and complete infrastructure operations. As Inci GS Yuasa, I believe that we have made great progress by working day and night to use our potential in the most productive manner and our operations continue at full pace.

As Inci GS Yuasa, we have planned to make investments of 200 million TL within the next 5 years. As a company exporting to over 80 countries across 4 continents, we reach our customers through our 80 main dealers at home, 200 Energy Experts, 3.500 retail outlets and wide foreign distributor network. We aim at doubling the number of our employees



and tripling our total sales figures within the next 5 years with our new investment plans and high added value products.

We continue our operations under the title of Inci GS Yuasa in partnership with Inci Holding, one of the well-established subsidiaries in Turkey, and Japanese battery giant GS Yuasa. According to top 1.000 export companies of Turkey survey by Turkish Exporters Assembly, we are the export leader of our industry in Turkey for the last 7 years. Our target is to reach a stronger position with branding activities in existing foreign markets and to quadruple our export sales revenue at the end of 5 years.

As Inci GS Yuasa, we continue at full speed to realize our investment plans with our global partner and to increase our production capacity. We know that increasing our production means growing the industry, providing more products to domestic and foreign markets and to support export of our country. As Inci GS Yuasa, we move on our path with confident steps to reach our 5-year targets that we set following our partnership. ■



We, as Turkish location of foreign investor Leoni AG automotive group, are the supplier for the world's largest automotive and whiteware manufacturers.

Operating in Bursa Free Zone and exporting 90% of its production, Leoni Turkey has focused on diversifying its range of products for automotive and whiteware industry. The operation authority of factories that manufacture automotive cables of Leoni AG across the world was given to Turkey at the beginning of 2016.

Continuing its investments without any interruption by turning crisis periods into opportunities, Leoni Turkey aims at strengthening its leader position in the industry by increasing its Cable production, which was 1.8 million km in 2014, through its past investments over €10 million to 3.0 million km by the end of 2016. As Leoni, we are proud to work with all of our business partners due to recent developments. We will continue our existing growth plans in Turkey in the same manner in the coming years. ■

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for teammates

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"Üye İlişkileri Sorumlusu" pozisyonlarında  
görev alacak takım arkadaşları arıyoruz.**

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**94 %  
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**12 YEARS  
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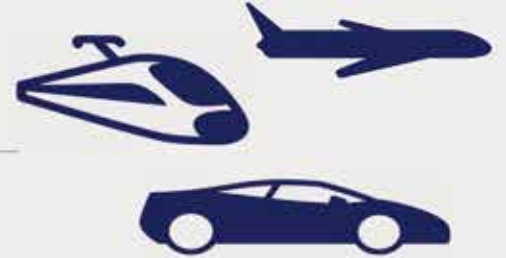
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**12**



COUNTRIES, IN WHICH  
OUR COMPANY HAS BRANCHES

**96**



**OEM'S**

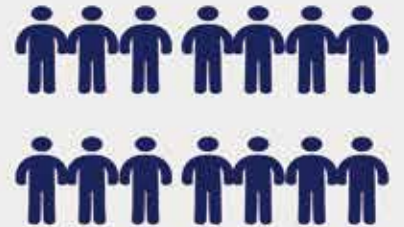


**620+**



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# DAF- PACCAR Group aims to increase cooperation with Turkish Automotive Supply Industry

**DAF- PACCAR Group hosted TAYSAD members within TR Ministry of Economy Sectoral Trade Delegation for the second time in its premises in Eindhoven. The second round of the event, which has held in 2014 for the first time, was completed on July 13-15th, 2016 with the cooperation of 17 different TAYSAD member companies.**

**D**AF, an affiliate of PACCAR Group that is an important group company in heavy commercial vehicle manufacturing, had face-to-face interviews with companies that were selected at its own discretion and according to its needs from among over 50 companies that made preliminary application for the delegation. During the 2-day program prepared with the coordination of DAF-PACCAR and TAYSAD, 30 representative from 17 companies had the opportunity to get detailed information about the company.

The first day of delegation at DAF was inaugurated by Howard Wright, Senior Director for PACCAR Europe Procurement Department. Howard Wright shared information in his detailed DAF presentation about DAF's global position, sector-related data and procurement strategy. Wright remarked that they aimed to develop their part procurement markets and this organization that was held with the

cooperation of Turkish automotive supply industry organizations that are TAYSAD members was an important opportunity to enable the parties to get to know each other better and discuss cooperation opportunities for the future. In addition to DAF, Wright also gave information about other heavy vehicle trademarks - PETER-BILT and KENWORTH - within the group and shared information about joint procurement strategy of the group.

Nühket Nur Kılıçkaya, Export General Directorate Specialist at Ministry of Economy of the Republic of Turkey, talked about Turkish automotive industry authorities in her speech and wished that the delegation would bring fruitful results for both parties. Sercan Duygan, Corporate Relations Specialist who made TAYSAD presentation, gave information about TAYSAD and its members and shared information about sector-related statistical data with the audience.

TAYSAD members were informed about DAF's global market position and procurement strategies with the detailed presentation made by Pepjin van Buren, Director for DAF- PACCAR Europe Procurement Department. The details on quality requirements expected from the suppliers were shared with the audience during the presentation made by Twan Winters, Director for Supply Quality.

The first day program covered DAF factory visit, assembly lines and part distribution center. The first day program was completed with DAF Experience Center visit that drew great interest of participants. The center where DAF vehicles were exhibited in detail aroused great interest both with the animation shown and the opportunity to examine closely the vehicles from CF, LF, XF series.

On the second day of the delegation, each company met with OEM and OES procurement directors of relevant product range during closed meetings. Before the delegation, preliminary survey was carried out by DAF on company basis and answers to questions about analyses were tried to be found. Company representatives had the opportunity to promote their companies in detail during the meetings and to discuss face-to-face details of the next phase. In the meeting held between TAYSAD and DAF Management, advises were taken about next possible steps to be taken in the US market from DAF-PACCAR group companies.

Following bilateral discussions, the program ended with DAF Museum visit to Eindhoven. The delegation also had the opportunity in the museum, accompanied by DAF Procurement Department managers, to see vehicles with different models that were manufactured for passenger and defense industries in the first years of the foundation of DAF. ■



# DÜNYANIN YOLLARINA DAMGA VURAN KALİTE



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• SOUTH AFRICA • SPAIN • SWEDEN • TAIWAN • TUNISIA • UKRAINE • UNITED ARAB  
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## EKU FREN VE DÖKÜM SANAYİ A.Ş.

TAYSAD Organize Sanayi Bölgesi [TOSB] 1, Cadde No:13 41420 Çayirova - Kocaeli - Türkiye T: 0262 658 10 10 F: 0262 658 10 00 www.eku.com.tr eku@eku.com.tr

# EKU

# The Future of the world's automotive will be discussed in Istanbul in November

**Turkish Automotive Industry commenced the preparations of the first IAEC (International Automotive Engineering Conference) which is going to be held on the 3rd and 4th November. The future of the automotive will be discussed at the conference, which will gather engineers responsible from R&D and product development in automotive and supply industry.**

Istanbul is getting prepared to host an important event for the world's automotive sector on the 3rd and 4th of November. The conference is being held in collaboration of Automotive Industry Exporters' Union of Turkey (OIB), Automotive Manufacturers' Association (OSD), Automotive Technology Platform (OTEP) and Association of Automotive Parts and Components Manufacturers (TAYSAD) with the support of American Society of Automotive Engineers - SAE International. The conference will gather the automotive and supply industries' engineers, who are responsible from R&D and product development, and will be a provide a platform for discussions on the future of the automotive.

**"IAEC will be an internationally respected event for the sector"**

Being as the first Turkish president of SAE, the supporting agency of the Conference, Mr. Cüneyt Öge said: IAEC will

be an internationally respected event for the engineers working in the automotive sector both in the world and Turkey.

Öge stated that SAE International is an elite organisation within the automotive sector and being as one of the most prominent institutions in the automotive sector, they have been developing their own standards, producing reference publications, contributing the sector development and holding various important events not only in US but all over the world. Öge said: The progress of Turkey in the automotive, the success of the companies in R&D and innovation, job opportunities and the staff of Turkish universities in automotive engineering field are the main reasons why IAEC is organised in Turkey. IAEC will enable new openings in world markets for Turkish automotive industries' innova-

tions. In that respect, SAE International puts great importance in IAEC and supports it.

**"Such an international congress was needed"**

Prof. Dr. Ali Gökten, the President of OTEP and the Member of Organisation Committee of IAEC, elaborated on the Conference at the press meeting. Dr. Gökten said: It is a pleasure to see that the number of congresses, symposia and similar organisations on automotive are increased in Turkey in recent years. However, almost all of these events are being supported by various channels but what the sector, which is the leader of R&D and innovation as in export in Turkey, need is a sustainable event which is being adopted by relevant NGOs and institutions. This is how IAEC is decided to be organised by OSD, OTEP and TAYSAD in cooperation with OIB.

**The future of automotive engineering will be discussed**

Prof. Gökten stated that the aim of the conference is to share international experts' ideas and views with the participants within the scope of the present dynamics and the steps which are needed to be taken in the field of engineering by the automotive industry. He continued: Within the industry there is a need to improve the engineering activities, strengthening the university – industry collaborations. Additionally, in terms of international engineering, the companies are needed to use alternative resources on knowledge and technics. In line with this need, training and development activities are essential for both technical and engineering staff. In the light of these aim and reasons, IAEC is being planned in a manner that will shape the engineering activities in the automotive. ■

## SAE INTERNATIONAL

SAE International, initially established as the Society of Automotive Engineers, is a U.S.-based, globally active professional association and standards organization for engineering professionals in various industries. Having more than 138,000 members, SAE International SAE International coordinates the development of technical standards.





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# TAYSAD was in Japan with its Operational Excellence URGE Project



**Association of Automotive Parts and Components Manufacturers visited automotive main and supply industry companies that are based in Japan in the scope of Operational Excellence URGE Project that was launched in 2014 and has been carried out with the support of Ministry of Economy.**

Alper Kanca, President of TAYSAD, who evaluated the recent travel to Japan of a 22-person delegation, where 10 TAYSAD member companies that were involved in the project participated, said "We have carried out many activities so far in the framework of Operational Excellence URGE Project. We achieved almost all of the cost reduction and efficiency-increasing benefits that we aimed at with this project from the very start. We travelled to Japan, which is the hub of works that shed light on the project in the recent days." President Kanca noted that factories of Mazda and Toyota that are major automotive manufacturers of the country and manufacturing facilities of Toyota Boshoku, Aisin, Denso and Sango companies that are important suppliers of Toyota in Toyota City were visited in the scope of the travel to Japan, which was the final step of education and consultancy works that were implemented in the scope of Operational Excellence URGE Project in Automotive Supply Industry.

Kanca, President of TAYSAD, said that they also had the opportunity to observe good practices toward Toyota Production System during this visit. President Kanca said "We examined the examples of good practices of major automotive industry companies that we visited during our travel in Japan and discussed what we saw and learned and evaluated the results with our company's authorities in workshops. Kanca, President of TAY-



SAD, also said that Mazda and Toyota museums were also visited and first hand information was obtained about the development and technology level of Japan automotive industry and remarked "Said visits enabled participants to observe how lean manufacturing techniques and culture, for which they undergo education and consultancy throughout the project, were implemented in Japan and internalize what they learned during these visits".

**"Thanks to the project, benefits worth of approx. 6 million TL have been reaped so far"**

Alper Kanca, President of TAYSAD, mentioned that participant companies managed to improve their costs and decrease their wastes and thus, obtained competitive advantages. Emphasizing the success of project, where growth

**Alper Kanca, President of TAYSAD, mentioned that participant companies managed to improve their costs and decrease their wastes and thus, obtained competitive advantages. Emphasizing the success of project, where growth without compromising on profitability and increasing costs was targeted, Alper Kanca said "Thanks to the project, benefits worth of approx. 6 million TL have been reaped so far."**



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### TAYSAD business travels to Japan to continue

Drawing attention to the fact that visit to Japan automotive companies with the support of Ministry of Economy in the scope of TAYSAD Operational Excellence URGE project is in conformity with "Genchi Gembutsu" philosophy that is at the core of lean manufacturing, President Alper Kanca said "After observing in-situ and examining good practices, we believe that our project comes one step closer to its goal. The next goal of the companies that are involved in our project is to bring and tailor good examples to our country and implement them in their companies and transform them into a corporate culture. As TAYSAD, we will continue to make similar visits; enable a higher number of our companies to benefit from these opportunities and continue our non-stop efforts to ensure that automotive supply industry becomes successful in the global competition." ■

without compromising on profitability and increasing costs was targeted, Alper Kanca said "Thanks to the project, benefits worth of approx. 6 million TL have been reaped so far.

During the improvement works, productivity projects that would enable companies to reap benefits and see quick results

in terms of costs were given the priority. Gains such as reaching higher production quantities with the same number of employees, decreasing process times in lines and raising the quality level were made. These improvements also contributed to determining next priorities and setting new development targets."



**HANİFE İPEK**  
**VICE GENERAL DIRECTOR,**  
**SARIGÖZOĞLU A.Ş.**

I would like to thank TAYSAD for selecting Japan for this program that was realized in the scope of TAYSAD Operational Excellence URGE project and for their excellent organization and all colleagues that joined us as well as TAYSAD team. I think that presentations made by companies that we visited during the program, all working

environments that we saw and their communications offered us a different perspective. What was common in all companies that I notice and care the most is that an ergonomic working environment was prepared for each employee according to his/her duty. Accordingly, it was ensured that the employee could work without getting tired and in an efficient, planned and target-oriented manner. I think that if the same program is reiterated in a company in the field of automotive industry and/or experts working in the same industry in Japan visit our companies according to a schedule and guide us, this will make positive contributions to the program and the number of ergonomic working environments with work discipline and most importantly, high respect toward people can increase in our country as well. ■

### ŞENAY VATANSEVER GÜLEN

**BOARD MEMBER,**  
**İZO-TEK INSULATION**

I think that our travel to Japan has made many contributions to our company and will continue to do so. Thanks to the full and comprehensive program prepared by TAYSAD, we had the opportunity to observe in the companies that we visited the live operation of the system, which we are trying to implement in our companies. The world's giant companies opened their doors to us in all their sincerity thanks to TAYSAD. Although Japan companies that we visited are at the same manufacturing level with us, it is highly unlikely not to be affected by the achievements of this system and its benefits through corporate culture to employees, company and thus, the country. There is no reason for us not to implement these systems as well and achieve higher gains. After we saw material & moral benefits obtained through small improvements by each employee, we were thrilled to go back to our country and implement them in our workplaces. I would like to thank Ministry of Economy, TAYSAD and Idealkoç teams for this opportunity. ■





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## ÖMER FARUK TEZCAN

GENERAL MANAGER,  
IDEALKOÇ

Travel to Japan that was organized as the pillar of foreign marketing under Operational Excellence URGE Project that was launched by TAYSAD in 2014 was a trip organized for cultural and industrial comparison. Although Japan is a country where language and communication difficulties may be faced and local traditions and customs may be difficult to adapt to, it is a more technologically and sociologically advanced country than our country. My biggest concern before the travel was to encounter something like "These things do not happen in our country". At the end of the travel, TAYSAD team had enjoyed the travel in every sense; was glad that the program was effective and ran smoothly and did not find customs and traditions of a foreign society strange at all and returned to our country with the thrill of adapting many practices to our country and our companies in a similar feeling that we felt when we founded Toyota Turkey back in 1990s.

Lean Thinking or Toyota Way is an approach that was built on the principles of "Continuous Development and Respect to Human" in terms of management and life philosophy. We equipped these abstract concepts with concrete tools such as S, VSM, Kaizen, SMED, Heijunka, Poka-Yoke, TPM and Hoshin Kanri so that participant companies can comprehend

TEACHING  
AND LEARNING

We saw that Japanese managers were interested not only in the result but also in the process. All questions were answered with mutual agreement of the entire team. The Japanese are always open to teaching and learning. They were as much excited as us about our visit.

them and tried to ensure that they witness them by experiencing them. Companies that participated in the travel to Japan saw how the Japanese integrated Lean Thinking into their lives and digested and reflected the philosophy into their daily lives and how the management followed up a series of policies and long-term targets instead of only short term targets and indicators.

New concepts such as Karakuri, monozukuri and hitozukuri were introduced to our team. Karakuri covers tools and mechanisms that provide benefits such as ergonomics, productivity, occupational safety and ease of business where gravity and laws of physics based on "creative thinking" are used without using electricity or modern technology. The Japanese even built an arrow-shooting robot/doll based on these principles in the 14th century. In other words, the current advanced level of the country comes from the past.

They address Monozukuri, i.e. production development and Hitozukuri, i.e. human development in a philosophical approach. They supported the reason of existence and management philosophy that the company adopted with a series of exclusive policies. Education, quality, planning, leadership, feedback, occupational safety, environment, Kaizen and problem solving activities are developed through these policies. Thus, a perspective where business life is defined with all phases of life is shaped, away from the classical stationary and monotonous state of the industry. Like birth, life and death...

We saw that Japanese managers were interested not only in the result but also in the process. All questions were answered with mutual agreement of the entire team. The Japanese are always open to teaching and learning. They were as much excited as us about our visit. The presenter began his presentation with explaining the motto in his sphere of influence and the top priority policy. It was like he was doing the most important job in the world. It was really impressing.

The tour operator who was responsible for our travel within the country was extremely sensitive about timing and punctuality as it was expected. First of all, information about benefits to be gained and then additional information about our limits were given. It turned out to be an experience for us where time management and communication were perfect.

Actually, we should visit Japan one more time to complete this experience. Only then, we can experience how life quality can be increased without compromising on cultural wealth of a country. We can see better what should be changed for development. ■



TMC inside Lexus LFA works factory

# 5 CONTINENTS 91 COUNTRIES



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**MEHMET YILDIZ**

**LOGISTICS, PLANNING,  
PURCHASING & CONTINUOUS  
IMPROVEMENT MANAGER,  
LASPAR ANGST+PFISTER**

**D**uring our program in Japan, we had the opportunity to visit Toyota assembly plant and manufacturing facilities of the major suppliers of Toyota. We observed how lean manufacturing techniques were adopted

by employees and used in harmony in plants where lean manufacturing philosophy was born and developed.

What strikes me most is that all manufacturing plants were focused primarily on occupational safety in line with the principle of respect toward employee and they made efforts to carry out all ergonomic improvements in order to ensure that employees work in a comfortable environment. It was expressed in the companies that we visited that occupational safety and ergonomics works had very positive effects on improving productivity and dropping costs. When we discussed their targets with the executives, they always mentioned their occupational safety targets first and then quality targets. They said that quality is the most important criterion among manufacturing

We saw that Japanese managers were interested not only in the result but also in the process. All questions were answered with mutual agreement of the entire team. The Japanese are always open to teaching and learning. They were as much excited as us about our visit.

performance indicators and they constantly work on quality issues in line with the continuous improvement (Kaizen) principle. Employee development and environmental awareness were the priority issues.

We saw special training halls and a high number of employees who were trained in these halls in the plants we visited. All plants mentioned in their presentations about their emission reducing actions and tree planting organizations that were held with the employees. In brief, our travel to Japan was very efficient for us and broadened our perspectives. I would like to thank once again to TAYSAD team for this professional organization. ■



**LEVENT TAYLAN EMİR  
HÜSEYİN SEZİK**

**TECHNICAL MANAGER &  
MANUFACTURING CHIEF,  
EGEMET EGEMETAL DÖVME**

thoroughly considered and planned. We are of the opinion that these experiences will make substantial contributions to lean manufacturing works that we continue to apply in our company. We would like to thank Idealkoç team who shared their knowledge and experiences with us in this project and TAYSAD authorities and Ministry of Economy that made this organization possible. ■

We saw that the respect people show to each other in their social and business life, their commitment to work and work discipline played a very big role in keeping their motivation high.

**W**e believe that the experiences we gained from the Japan program will have considerable benefits to our company. We had the opportunity to get to know the Japanese culture better in this travel. We saw that the respect people show to each other in their social and business life, their commitment to work and work discipline played a very big role in keeping their motivation high. It drew our attention in our visits that lean manufacturing techniques were being implemented perfectly and the flow of products from design to shipment were

**EROL SAPÇI**

**CEO, FKT KOLTUK**



**I**saw how developed the companies that we visited were. What I mean by logistics is implementing long-term programs that cover both material and human supplies. From now on, we will add human resources item to manufacturing and quality issues that guarantee shipment when we carry out our supplier audits. We will also contact vocational high schools and enable third and fourth-class students to visit our company and ensure that they are informed about logistics and manufacturing etc. during the education phase. ■



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**MURAT GÖNENÇ**

**LEAN COORDINATOR,  
KALE OTO RADYATÖR**

I think that our travel to Japan was an opportunity to compare the practices in our company realized with Operational Excellence URGE project with the practices in Japan companies that are the founders of lean manufacturing and to see where we stand and that it made many contributions to us both personally and professionally.

**We saw the peaks in lean manufacturing during this visit and now we will upgrade our practices and try to reach these peaks.**

What struck me most during the visits was that lean manufacturing philosophy was adopted not only in the industry but also in the daily life on national scale. As a result of the improvement achieved by Kaizen practices, the general opinion is that a positive effect is created in the development of the entire nation and they pride on this. There is no "me"; there is "us". We saw the peaks in lean manufacturing during this visit and now we will upgrade our practices and try to reach these peaks. ■



**ALİ FUAT KOCA**

**LEAN MANUFACTURING TEAM  
LEADER, KANCA DÖVME ÇELİK**

I would like to thank everyone who made efforts first for Operational Excellence URGE project and then for Japan program and Ministry of Economy that provided us this opportunity. Work commitment & loyalty, industriousness, positive perspective to the future and life and modesty of the Japanese were observed as their strengths in applying lean techniques.

We were able to examine in-situ the situation in manufacturing companies in Japan that is the homeland of this work and compare our current position that we achieved with this project, on which we have been working intensively for the last two years, with their position and it became a good reference point for us to see some issues that used to seem utopic to us with good examples. ■



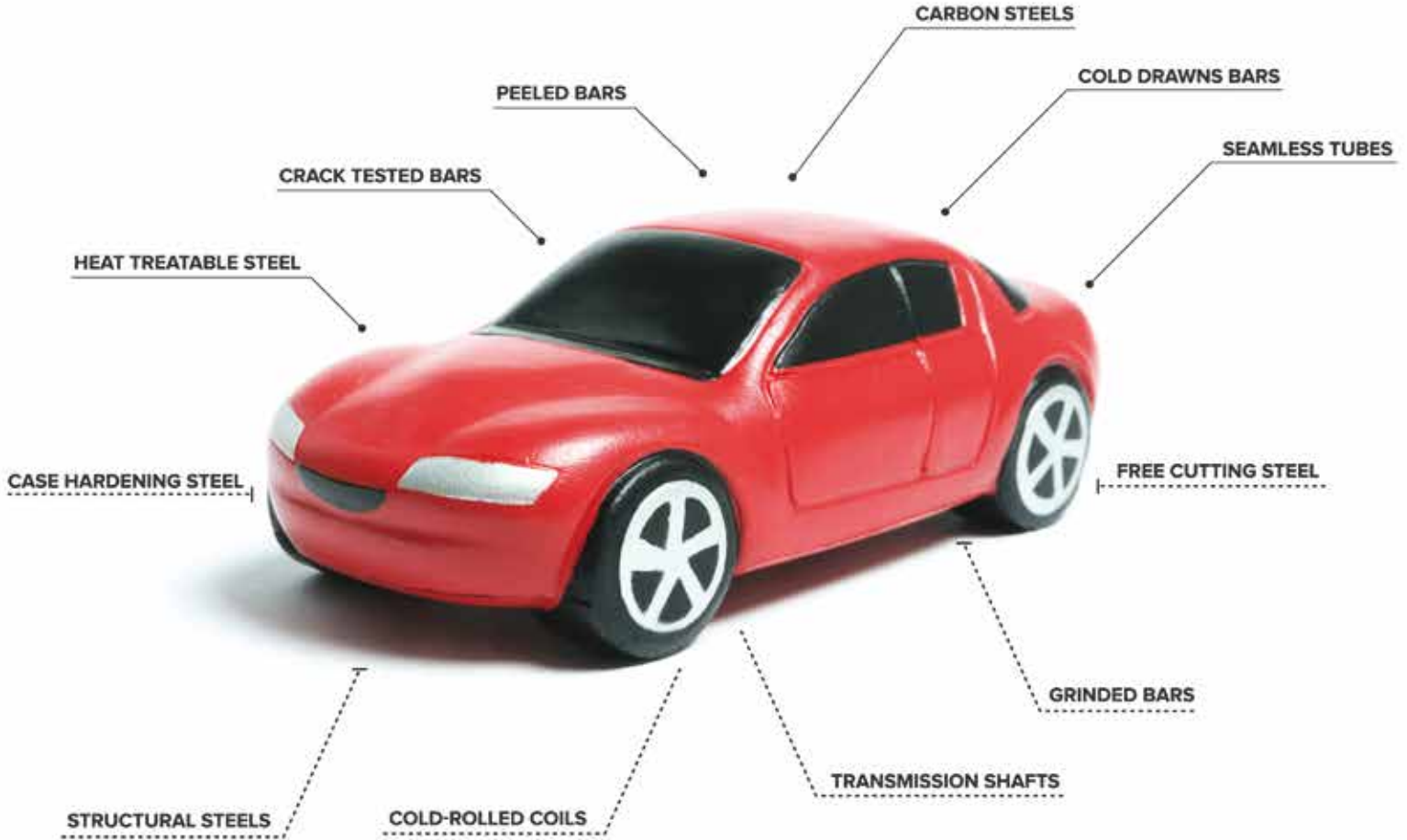
The opportunity to observe what we learned during the two-year training on the line strengthened our training. We witnessed how the change in corporate culture played an effective role and that blue collar was as important as white collar to establish these systems. In fact, it made me very glad to see the benefits that Kaizens prepared based on the suggestions made by blue collar workers working on the line provided. At the end of our visit, we realized that we all lack something and returned to Turkey to do better things. I thank TAYSAD and İdealkoç team for their contributions to this organization. ■



**BURAK KASIM**

**BOARD MEMBER,  
ARK PRES EMNİYET KEMERİ**

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# OEMs react to UK vote to leave EU – (BREXIT)

**On the morning after the UK electorate voted to leave the European Union, OEMs have reacted to the uncertainty that it has presented.**

**T**he decision of UK voters to leave the European Union (EU) on 23 June has raised a great number of unknowns, particularly for the automotive industry in Europe.

The main impact on light vehicle (passenger car and LCV) registrations is expected to be in the United Kingdom. The market has had a strong run of sales during the past few years leading to record sales. Momentum is currently expected to be maintained over the course of 2016 with an increase of 1.8% y/y to 3.07 million units, albeit seeing some tailing off in the second half. However, we anticipate a fall of 9.7% y/y to 2.77 million units during 2017, while in 2018 we see demand hitting around 2.72 million units.

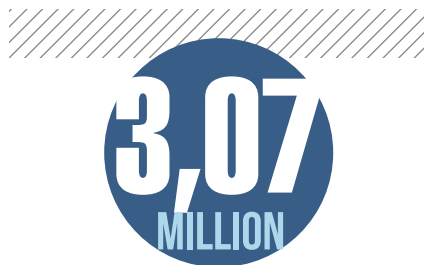
Although a decline was already expected, there will be a number of factors because of the Brexit situation that will contribute to this fall. Not least the major economic and political uncertainty, which will weigh down on business and household confidence and behavior, and thereby dampening investment, employment, and consumer spending. Weaker asset markets and tighter credit conditions are anticipated to further hamper UK growth, while the housing market could suffer a marked downturn.

Furthermore, the pound sterling has fallen sharply following the Brexit vote and will probably push up inflation, thereby squeezing consumer purchasing power. This factor is expected to eventually make imported vehicles more costly, with some OEMs already suggesting that they are considering this.

However, the weak pound should also benefit UK exports, including vehicle exports in the near term - despite the higher

cost of imported components - which could be beneficial to OEMs in the short term. Even so, there are still questions on future investment in to the country by automakers and component suppliers. These are only likely to be answered when Article 50 of the Lisbon Treaty – the process of exiting the EU – is triggered and negotiations can begin with the EU on a range of areas including tariffs on imports and exports. As a member of the World Trade Organization (WTO) as both a state and as part of the EU, it would appear that the maximum tariff that would be applied on UK-produced vehicles will be 10%. With the narrow profit margins that some automakers based in the UK are working to, the imposition of such penalties could jeopardize future product allocation.

Any allocation of tariffs on UK-built vehicles sold in the EU – by far the most important export destination – is likely to result in similar tariffs being applied to EU-built vehicles shipped in to the UK though. Therefore it will be in the interests of many for this tariff-free arrangement to remain in place.



*Momentum is currently expected to be maintained over the course of 2016 with an increase of 1.8% y/y to 3.07 million units, albeit seeing some tailing off in the second half.*

IHS Automotive has adjusted its European production forecast (including Turkey and Russia) to reflect the reduction in our UK sales forecast and adjustments made elsewhere in the region and beyond. In the remaining six months of 2016 we expect output levels to lose 120,000 units or 0.6% compared to our earlier June forecast, although total production for the full year will rise by 2.8% y/y to 21.53 million units as it holds on to a 500,000-unit rise generated in the first half of the year thanks to strong sales demand on a recovery in the region.

As uncertainty intensifies during 2017 and 2018 the impact on production volumes will increase. For 2017 and 2018 we have reduced our production forecast by 430,000 units (down 1.9%) and 500,000 units (down 2.2%), respectively. This will see total production in these years standing at 21.72 million units and 22.12 million units. Some markets will be more affected than others though. Over the course of 2017 and 2018, we have reduced the combined production forecast for these years in Germany by 229,000 units and Spain by 155,000 units. By contrast we have only reduced our forecast between 2017 and 2018 in the UK by 19,000 units, with growth still being recorded during 2017. ■

• Reference to IHS Automotive: Article

- OEMs react to UK vote to leave EU - REPORT PRINTED ON 25th June 2016, Edited 10th August 2016

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**We at TAYSAD, the robust NGO representing the subcontracting industry in turkey, know that the industry is moving full steam ahead in this direction. If it can get customers in Europe and other countries throughout the world to appreciate its automotive excellence, a distinction it has acquired through experience, and its potential, it will have the chance to expand even more through the development of new business models and technological partnerships.**



**Ahmet Yilmaz**

**Chairman of the Board of exTim GmbH**

## When looked at from the outside

**T**urkey has been receiving bad PR in light of political developments in the country over the past few months. In Europe, Germany in particular, unjust assessments have been made of the Turkish economy and the industrial sector, and inaccurate news is being reported. We see that the attempt is being made to create a perception that does not square with reality. We know that, in particular, people, organizations and institutions that are familiar with the automotive and subcontracting industrial sector do not heed this information. The Turkish subcontracting industry has had enormous success in a short period of time in Europe and knows its friends are there anyway. Nevertheless, what are the pluses and minuses of the sector when we look at it?

### **Speed, Competition, Quality**

The first aspect of the Turkish main and subcontracting industries over the 10-15 years that stands out is the speed at which they have

developed in many areas. Their quickness to adapt to global commercial and technical changes, as well as to achieve quality and to improve their competitiveness is relatively greater than many other automotive sectors in other countries. We also see that the Turkish subcontracting industry is advancing relatively more quickly than is the main industry. The subcontracting industry's focus on export-oriented production is a major reason for this. Indeed, the modern factories, built in in brief period of time, and the capacities thus created, have actually forced them in this direction. The Turkish subcontracting industry has reached the point where it can competitively manufacture all important high-quality components and modules within the automobile added value chain. Therefore, it has captured the attention of all international automobile producers and has developed subcontracting relations with them. The parts of many automobile brands are now manufactured in Turkey.

Technological advances have had major impacts on the basic and contracting automotive industries. These impacts have driven subcontractors in Turkey to look for new pursuits. The creation and employment of new technological solutions and the promotion of modern and module alternatives to classic subcontracting have continued apace. The positions of subcontractors in Turkey in this regard are relatively more advantageous than those of subcontractors in Europe or of other manufacturers. For instance, they are comparatively more open to new technological advances and more willing to use them than their competitors. Their engineering cadre is also younger and more willing to take risks. What's more, because most businesses in Turkey are family run, they are more flexible. In contrast to Europe, where technological advances are developed by giant subcontractors, in Turkey, smaller companies are taking somewhat more rapid steps in the area of innovation. One deficit in Turkey is the

paucity of non-business R&D and innovation networks. Provided that this scarcity can be eliminated by fostering the notion of international technological collaboration, they could quickly become a model in this geographical area.

We at TAYSAD, the robust NGO representing the subcontracting industry in turkey, know that the industry is moving full steam ahead in this direction. If it can get customers in Europe and other countries throughout the world to appreciate its automotive excellence, a distinction it has acquired through experience, and its potential, it will have the chance to expand even more through the development of new business models and technological partnerships.

The Turkish subcontracting industry has reached the point where it has the potential to engage in multi-faceted cooperation and enable the companies working in the industry to grow. The only mission is to do! ■



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# RACING TOWARDS 2015 CAFÉ TARGETS

**If we would ask the top auto executives in North America to tell me the first item in their agendas, the answer would probably be CAFÉ (Corporate Average Fuel Economy) in the USA.**

In 2015, auto manufacturers must reach a target of 54.5 mpg or 5.2 liter/100 km as the average fuel consumption of their vehicle portfolios. Theoretically, this target is easier to reach as the model range of an auto maker shifts towards smaller, more economical vehicles possibly with alternative powertrains. BEV's (Battery-Electric Vehicles), mild and full hybrids would make things easier. However, those alternative powertrains do have cost and technical (like; short-range and long charging time) disadvantages and marginally only preferred by the customers.

With fuel prices in North America at historic lows in the last couple of years, customers migrate to bigger, less economical vehicles like SUV's and crossovers.

For example: The 2017 GMC Acadia sport utility vehicle is 700 pounds (317 kg) lighter than the version it replaces and can go 23 miles on a gallon (12 liters per 100 kilometers) of gasoline, up from 18 mpg, a 28 percent improvement.

The little secret behind the big weight loss is glue.

Many of the steel parts of the Acadia's underbody are held together not by rivets or welds but by advanced adhesives similar to those used in modern airplanes like the Boeing Dreamliner. Since the glue bonds parts together all along the seam where they connect, not just in certain spots, the parts become stiffer. Because of the stiffness, General Motors is able in many cases to switch to thinner steel, helping the new Acadia shed pounds.

Another promising technology for the



**VAROL  
KARSLIOĞLU**

near future is a new type of gas-electric hybrid that draws power from a 48-volt battery, which is more powerful than a standard 12-volt auto battery but less expensive and less complicated than the power packs of 200 volts or more found in hybrids like the Toyota Prius. Delphi, one of the biggest automotive suppliers claims that those hybrids can improve the fuel economy of normal gasoline-powered cars by 15 percent or more with little additional cost. Delphi's technology would first appear in Europe and China in 2018.

The leading and financially very powerful manufacturers like Toyota can focus more on breakthrough technologies — such as electric cars and hydrogen-powered fuel cell vehicles — that can meet the 2025 standard and continue improving fuel efficiency beyond then.

While still developing alternative powertrains, auto makers, in the shorter term,

are improving a series of existing or relatively new technologies:

## Engine Downsizing

Shrinking the size of engines while adding turbocharging, which increases power and efficiency by forcing extra air into an engine. This approach enables a four-cylinder engine to put out about the same power as a traditional V-6, and a V-6 to replace a V-8.

## Stop/Start

This system shuts off the engine when a car stops at a light or in traffic. Some vehicles already have this feature, but their rough restarts have turned off many consumers. Hybrids with 48-volt systems promise improvements.

## Freewheeling

Also known as engine-off coasting, this lets an engine shut off momentarily while a car is coasting, reducing fuel consumption. A hybrid car can use its electric motor to maintain cruising speed, letting the engine remain off longer.

## New Materials

Ford's aluminum-bodied F-150 full-size pickup truck, when equipped with the company's EcoBoost V-6 engine, comes close to the 2025 requirement — 23 mpg in real-world driving — in its category.

Auto makers already use more aluminum and advanced, lightweight steel. Now magnesium, which is a third lighter than aluminum, is appearing more frequently. Fiat Chrysler is using the metal in the tailgate of the 2017 Chrysler Pacifica minivan.

## Cylinder Deactivation

For years engines have had the ability to shut off two or four cylinders to conserve fuel. Using new computer algorithms, Delphi, GM and Tula, a Silicon Valley tech company, are working on "dynamic skip fire," a way of turning individual cylinders on and off as needed.

On the other hand, regulators have just begun a review of the fuel-efficiency standards and by April 2018 must decide whether to ease them in some ways — a path auto makers would prefer — or leave them unchanged. ■

*Resources: Automotive News, Toronto Star, Wheels Section*



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## Bosch received new investment incentive of more than 1.2 billion TL.

Bosch received new investment incentive of more than 1.2 billion TL, which will be used for renewing and increasing the capacity of its facilities that manufactures injection nozzles for gasoline and diesel engines. This investment will also create jobs for 1.500 people.

The government's supports and incentives for foreign investors continue after the coup attempt on July 15th. Within this context, Bosch Group's Turkey branch, Bosch Sanayi ve Ticaret A.Ş. received investment investment in order to increase the capacity of its

facility in Bursa, where the manufacturing of the injection noozles for gasoline and diesel engines take place.

Bosch has been granted with Investment Incentive Certificate in order to increase the capacity of its Bursa based Bosch Diesel and Gasoline Systems facility, which manufactures high tech injection systems for diesel and gasoline engines in order to be exported. The incentive will be used also for modernization of the facility as well as to manufacture new products. Existing in Turkey for many years, Bosch foresee an

investment spending of more than 370 million Euros (an equal of 1.2 billion TL) for the period between 2016-2020.

### Capacity increases

This new investment is expected to provide jobs to 1.500 people for Bursa Diesel and Gasoline Systems factory, which develops and manufactures products in line with Euro6 and Euro7.

The investment is also expected to be used for increasing the capacity and modernization of the plant, which manufactures common rail of diesel engines and high pressured injections that are used in gasoline engine vehicles, as well as the preparation for the production of new types of products.

### INVESTMENT INCENTIVE CERTIFICATE FOR BOSCH

Bosch was granted with Investment Incentive Certificate in order to increase its production facilities, which are used for producing diesel and gasoline engine high tech injection systems, and modernization of the facility as well as to manufacture new products.

Thus, it is envisaged to increase the diesel injection capacity up to 6 million 956 thousand units, the gasoline injections up to 4 million 600 thousand units and the fuel supply devices up to 650 thousand units. Bosch Bursa stated that they want to produce 20 million units each of diesel and gasoline injections by 2017.

Established its first factory in Bursa in 1972, Bosch had an approximately 2.5 billion Euros investment in Turkey. 1 billion Euros out of this investment was realized in the last 5 years. Bosch had a 300 million Euros investment. This is the highest investment amount among Bosch's global operations after Germany, China and US. ■

## Minister Özlü's visit to Bosch Rexroth Plant producing for NASA

Faruk Özlü, Minister of Science, Industry and Technology visited Bosch Rexroth Plant in Bursa that produces hydraulic motors for a project of NASA, and received information from authorized persons.

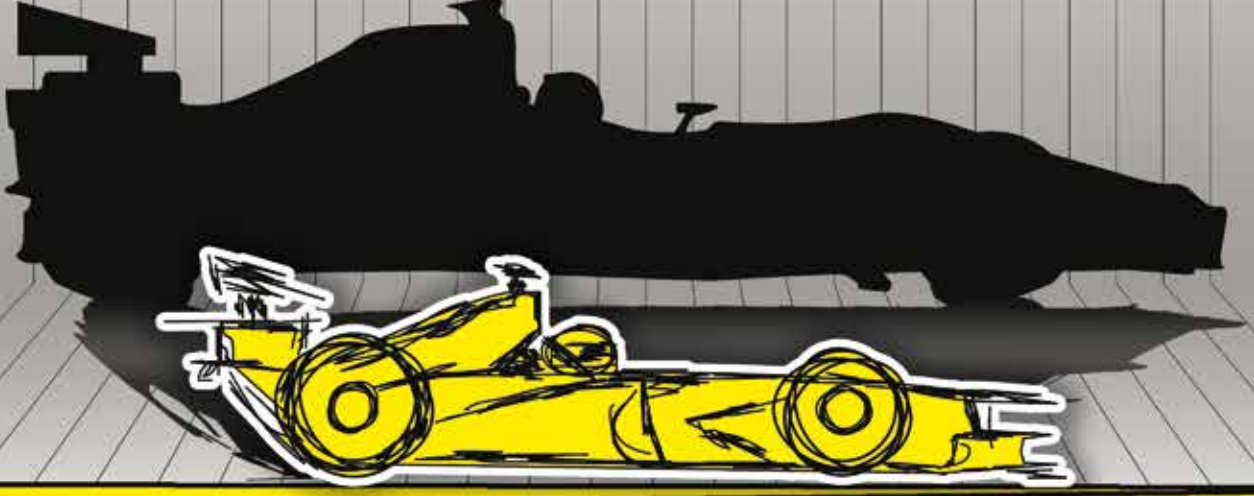
Faruk Özlü, Minister of Science, Industry and Technology visited Bosch Rexroth Plant in Bursa that produces hydraulic motors for a project initiated to reveal the secrets of Jupiter by NASA – the National Aeronautics and Space Administration of USA. Minister Özlü met the team who developed and produced 17 hydraulic motors that are entirely the work of the Turkish engineers.

Young: "These special projects will go on"

Emphasized that the special projects bearing a great importance in the world of Bosch started to be contracted to Turkey, Steven Young, Bosch Turkey and Middle East President said: "The special hydraulic motors used in the antenna systems of Juno which is the spacecraft sent to Jupiter is the last ex-

ample. The team of four that consist of Turkish engineers produced 17 special hydraulic motors in Bosch Rexroth Plant located in Bursa. Each and every part underwent special measurements and processes one by one. We produced these units that were used to be sent by Elchingen, the main plant of Bosh Group and shipped to America for the first time. We believe that these special projects will go on. All divisions of Bosch in Turkey put their signatures under successful works." ■

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## Maysan Mando to invest 130 million USD

A joint venture with South Korean Mando, Maysan Mando will invest 130 million USD in Turkey by 2019 in order to manufacture other product groups as well.

**M**aysan Mando, the first company in Turkey to produce shock absorbers, will invest 130 million USD in Turkey by 2019 in order to manufacture other product groups as well. Maysan Mando's General Manager Anil Yüçetürk said the company made an annual turnover of 73,5 million USD and manufactured 4.7 million units of shock absorbers in 2015.

Mr. Yüçetürk who stated that they are expecting a 15 percent increase in their production units added: We

aim to go over 80 million USD in the turnover and become one of the 500 companies of Turkey. The decision to make a 130 million USD investment in Turkey by 2019 is in approval of our executive board.

### Among the top 20 Exporters

Mr. Yüçetürk said that 65% of the Company's total production is dedicated to export OEMs such as Hyundai Czech, Kia, Renault Fransa and GM and many local OEMs such as Hyundai Assan, Oyak Renault,

**MAYSAN MANDO'S  
GENERAL MANAGER  
ANIL YÜÇETÜRK**



Daimler AG, Mercedes Benz Türk, Saf Holland, BMC, Ford Otosan, Tofaş, Anadolu Isuzu, Iveco, Otokar, Karsan, Mitsubishi- Temsa Global. With 24% of the production the Company is able to meet the domestic aftermarket demand; the remaining 21% is exported to countries such as Germany, Italy, the UK, Russia and Iran. Mr. Yüçetürk also elaborated on their export activities and said: Currently we export to 75 different countries. We specifically aim to increase

Russia, Middle East and Western Europe markets in our export markets. Our biggest market is European countries and we are able to present competitive offers for our customers by acting together with our partner Mando Corp. In that respect, Mando Corp.'s 21 global production location, 8 R&D centers, 7 sales offices and 6 vehicle test area is at our disposal. In a sense, we reach to our customers all around the world as Mando Corp. ■

## Maysan Mando "Supply Industry Meeting" Held In Bursa

Maysan Mando, the leader of the Turkish damper sector met with its suppliers at the "Supply industry Meeting" held at Crowne Plaza.

**T**he entire management staff that play a part in the supplier relations, particularly Anil Yüçetürk, General Manager and Young Jun Jee, Assistant General Manager were the hosts of the event. During this special ceremony that contributed to the authorized persons of Maysan Mando and Supply industry Company knowing each other, both parties got the opportunity to share their opinions and plans.

During this event that had a quite high attendance, the guests were welcomed by Maysan Mando authorized persons, and had short conversations at the lobby after they were registered. Started with the introductory movies of Maysan Mando, the meeting continued with the speeches by Anil Yüçetürk and Young Jun Jee. The speeches underlined the strategic steps taken by Maysan Mando, its speed of growth and future plans, corporate culture and the importance paid to the supplier relations.

During his speech, Deniz Yılmaz, Purchasing Department Manager gave important and detailed information on several issues that people wonder. The presentation started with the introduction of the group companies and addressed that the suppliers are interested in including ongoing projects of Maysan Mando, its sales figures, new projects and product groups, understanding of quality and supply industry evaluation criteria.

Supply industry Meeting 2016 ended with the cocktail prepared for the guests after the presentations. ■





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## Schaeffler celebrates its 30th anniversary in Turkey by launching a Training Center

Schaeffler, one of the world's leading integrated automotive and industrial suppliers, aims to contribute its customers' competitive edge with the Training Center inaugurated on June 23.



**SCHAEFFLER TURKEY GENERAL  
MANAGER ONUR KARAHAN**

Schaeffler, the company stands for the highest quality, outstanding technology, and strong innovative ability, has launched a new Training Center to transfer its knowhow to its partners while celebrating its 30th anniversary in Turkey.

Schaeffler experts will invest in the country's future by offering theoretical training to vocational school students and garages that they need in business life, and by transferring Schaeffler's new technologies along with

powerful tips to dealers' sales teams. Nearly 400 people (including 250 vocational school students) have participated in these training seminars over the past one-and-a-half months.

The four-story center is built on approximately an 800 m<sup>2</sup> usable area, incorporating a conference hall, a social area, meeting rooms, an open office, and storage and test areas for warranty parts.

At the Training Center Schaeffler ensures that local and foreign experts will deliver practical training on

proper installation, failure diagnosis, and selection of the most appropriate solutions.

At the official inauguration ceremony, Schaeffler Turkey General Manager Onur Karahan said, "We have established the Schaeffler Training Center to transfer our technological expertise to our business partners faster and make them a part of the development itself. This center will help us to contribute to our customers' competitive edge and fulfill our responsibilities towards the sector for promoting and developing the competence base of qualified manpower that our country really needs."

Dr. Robert Felger, Schaeffler Automotive Aftermarket Senior Vice President for Product and Marketing, emphasized the technical competency of Schaeffler in his speech. "In-depth

knowledge of systems and components gives us the upper hand in the aftermarket industry. Our goal is to become Turkey's preferred brand," he stated. Dr. Felger also announced the 2017 launch of local REPERT, an online support portal for garages.

Alex Mungiuri, Schaeffler Automotive Aftermarket Vice President for Middle East, Africa and Turkey, expressed the company's desire to support education through Schaeffler's first industrial and automotive Training Center in Turkey. "We hope that each and every company in this industry, including our competitors, will provide training to improve quality in this area," said Mungiuri.

In addition to several top executives from Germany, Schaeffler Turkey's major dealers, business partners, and representatives attended Schaeffler Training Center's inauguration during a fast breaking dinner hosted on June 23. ■



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# Sarıgözoğlu Apprenticeship Training Center Produced Its First Graduates

The Apprenticeship Training Center that was opened by Sarıgözoğlu Hidrolik A.Ş. operating in Manisa Organized Industrial Zone (MOSB) in 2013 and is providing 80 students with training produced its first graduates with a ceremony.

**M**ustafa Sarıgözoğlu, Board of Directors Chairman, Sarıgözoğlu Hidrolik A.Ş.; Levent Sarıgözoğlu, Vice Chairman; Nihat Akyol, MOSB Coordinator; İsmail Koç, Provincial Director of National Education; Metin Çengel, Yunussemre County National Education Branch Director; Ramazan ADAM, Deputy School Headmaster, as well as the teachers, students and parents attended to the ceremony held for graduation of 7 students from machine technology department and 11 students from metal technology sheet works, at Manisa Organized Industrial Zone's Training Room.

Made the inauguration speech, Mustafa Sarıgözoğlu stated that they opened this school with the motto "Vocational High School, the National Issue" and that being master in any job is possible with the competencies learnt and gained at early ages, and shared the excitement and pride of producing the first graduates. Spoke for the students, Cansu Aybar and Emre Çiftçi said that they got rid of the fear they felt while they were enrolling thanks

to the family environment created by their superiors and masters, that they learnt both the job and life and that they set targets for themselves. Mustafa Taşdemir, who was one of the parents, thanked to Sarıgözoğlu Management and employees, Halit Yavuz and İbrahim Özöztürk who dealt with any kind of problems of the students, and recommended the students to make a good use of these opportunities and to be useful individuals for the society.

Ramazan ADAM, the Deputy School Headmaster expressed his wish that the importance paid by Sarıgözoğlu to education and the support it provided

would set an example for the other industrial establishments.

First the certificates of achievement to the successful students and then the diplomas to the graduated students were given by Mustafa Sarıgözoğlu and Levent Sarıgözoğlu, with the impassionate acclaims of the attendees. The students that were awarded with diplomas gave a thank you plaque to Mustafa Sarıgözoğlu and Levent Sarıgözoğlu for the opportunities they were provided with. It also attracted attention that the flowers accompanying the plaque of the students were yellow and red.

Made the closing speech, Levent Sarıgözoğlu stated that the students who were awarded with journeyman's certificates at the end of 1-day theoretical and 4-day practical training for 3 years have their jobs ready, that both their clothing and wages will change and their level increased, and motivated the students with ongoing education by saying "Your graduate brothers and sisters are your superiors from now on."

Furthermore, Halit Yavuz, School Headmaster heralded the unlimited fun at the aquapark on weekend that was organized for all students to get rid of the tiredness of the educational year. ■



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## The product that pushes the boundaries in SEGER: Turbo Horn

Turbo horn which is produced with 81DH code number by SEGER, the biggest horn manufacturer in Turkey, makes itself heard with its high sound level and peculiar melody. Turbo horn is used in heavy commercial vehicles as well as trains with air tanks.

**S**eger horn which has production facility in Bursa and exports Turkish horn to almost 70 countries, makes a difference with its Turbo horn under 81DH code.

It draws attention as the horn with the highest sound level and with a different melody type amongst the other products in the market.

Turbo horn that features 2 air horn pipes made out of sheet metal material, has been designed to be used both in heavy commercial



vehicles and in trains. It has 2 pipes with 31 cm and 35 cm lengths and comes with 12V and 24V options respectively.

81DH Turbo horn draws attention from the end users with its high sound level.

### About Seger Horn...

With its 100% local capital and its worldwide recognition both in horn production and horn trade, Seger Horns has become a worldwide brand in the production of electric and air horns with the agreements made with the prominent domestic and worldwide vehicle manufacturers.

Seger Horns supplies its products to many prominent OEM's such as Renault, Isuzu, Audi, Honda,

### WORLDWIDE VEHICLE MANUFACTURERS

With its 100% local capital and its worldwide recognition both in horn production and horn trade, Seger Horns has become a worldwide brand in the production of electric and air horns with the agreements made with the prominent domestic and worldwide vehicle manufacturers.

Mercedes- Benz, Volkswagen, Tesla, Nissan, Ford, Dacia for passenger vehicles, BMC, Karsan, JCB, Iveco, Temsa, Otokar, DAF for heavy commercial and construction vehicles, Cukurova, Erkunt, Hidromek, Tumosan, Turk Tractor, Taral, Bozok Tractor, Hars Tractor for agricultural vehicles, Indian Motorcyle, Bigdog, Victory and Polaris for motorcycles.

Seger Horns exports its horns to almost 70 countries around the globe from America, Europe to Africa and Asia.■

## A first in Turkey by Yiğit Akü

Yiğit Akü introduces Turkey's first and only Lithium Ion Battery, Distalong, which is a product of the company's nationally funded ongoing and completed advanced R&D projects and innovation activities, to the sector.

**Y**iğit Akü's technological leadership and vision essential to all energy storage systems continue to provide gainings to the sector. Yiğit Akü conducts the different chemicals and productions for lithium ion batteries at its own labs and prototype production facilities, as well as METU's Material and Metallurgy Engineering Department's lab infrastructure. Lithium ion batteries have

a chargeable chemistry and they provide high energy comparing to their weight and size. This feature leads an increased usage of this kind of batteries in the world especially in electronic vehicles, electronic equipment, medical and military application.

Yiğit Akü continue its R&D activities with TEYDEB and SAN-TEZ by establishing university – industry collaborations. Yiğit

Akü's researches focus on the lithium cell, which are the core batteries of the system. Furthermore Yiğit Akü, which has studies on battery management systems and components, manufactures the prototype Lithium Ion battery modules that are composed of lithium batteries. Yiğit Akü is aware of the importance of the electrical architecture that manages and identifies Lithium Ion batteries' life cycle and security performance and accordingly research and development studies on modular systems continue with a production perspective.■

OVER 70 OEMs

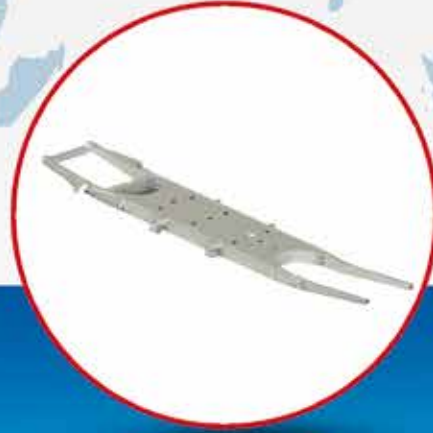
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### Chassis & Welded Fabrication

A complete in-house design-engineering and manufacturing resources to offer Welded Structures and Chassis to the exact specifications of various industry customers.

# Tirsan Came Together with its Business Partners in Germany

Tirsan met with its business partners from 13 countries at Goch facility. K-Advance Care that is the new maintenance-repair service Europe-wide and Kässbohrer Light Curtain Maxima were introduced. It reinforced its collaboration with the North Rhine Westphalia German Transportation and Logistics Union (VSL-NRW).

Tirsan's achievements in Europe are going on at full pace. Tirsan that is the only trailer producer with a manufacturing facility abroad and the trailer export record-breaker of Turkey came together with its business partners on 30 June 2016 at its facilities in Goch city, Germany, during 'Summerfest', its traditional summer gathering. During the event, Tirsan's new Europe-wide after-sale service and light curtain trailer launched in the Turkish market in early May were introduced.

Summerfest 2016 event was realized with the participation of Tirsan's business partners from 13 countries, representing its customers and representatives in Europe. Members of the North Rhine Westphalia German Transportation and Logistics Union (VSL-NRW - Verband Spedition und Logistik Nordrhein-Westfalen e.V.) also attended the event that followed the semi-annual meetings held at Tirsan's Goch facilities.

Spoke at Summerfest 2016,

Iffet Türken that is Board of Executives Member in charge of Business Development for Tirsan said "Today we are proud to be with our business partners here.

Thanks to the long-lasting collaborations with the sector components, we are still the fastest growing trailer producer of Europe. Within the first five months of this year, our sales in Europe increased more than two times.

In Germany, on the other hand, our growth is continuing

with an increased pace. Our rate of registry in the traffic within the first five months increased at the rate of 70.9% compared to the same period of the previous year."

Türken added "We owe our success to not only the fruitful collaborations with the sector components, but also to our competency in developing the right product for the right customer thanks to our strong R&D infrastructure, but also our ability to offer sustainable transportation solutions. The latest example is our K-Advance Care that is our all inclusive after-sale service and our Kässbohrer Light Maxima Curtain trailers."

Tirsan that has had a production facility in Goch, Germany since 1998 is getting ready

to commission a new production facility in Ulm city within the third quarter of this year.

## LONG-LASTING COLLABORATION IN NORTH RHINE WESTPHALIA

Kässbohrer, the trailer producer that has been collaborating with Tirsan since 2002 and has a past of more than 120 years in Germany has been a member of the North Rhine Westphalia German Transportation and Logistics Union (VSL-NRW) since 2014.

North Rhine Westphalia state of Germany where Goch city hosting Kässbohrer's headquarters is also located in also hosts Duisburg Port which is the world's largest inland port. Hosting more than

### LONG-LASTING COLLABORATION

Kässbohrer, the trailer producer that has been collaborating with Tirsan since 2002 and has a past of more than 120 years in Germany has been a member of the North Rhine Westphalia German Transportation and Logistics Union (VSL-NRW) since 2014.



one fourth of the logistic centers in Germany and the most German freightage companies in addition to this, the state is not only the heart of the German logistics sector, but also one of the most important logistic centers of the world. ■



# TİRSAN



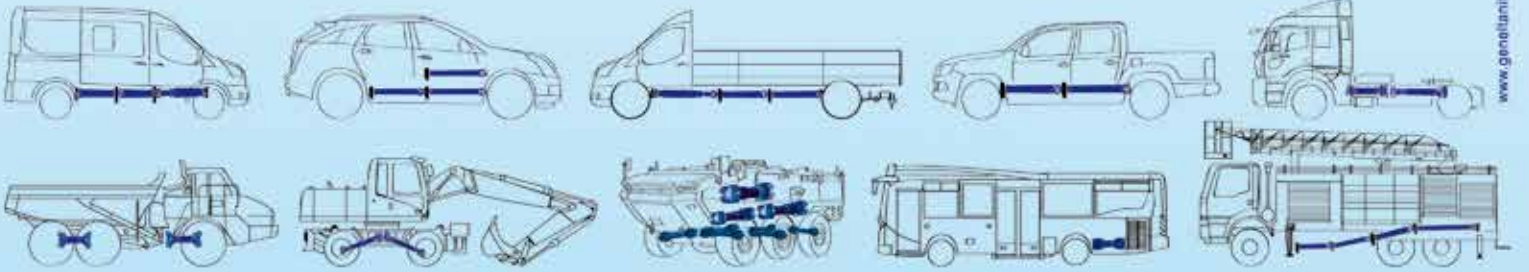
Light - Hafif



Strong - Güçlü



Flexible - Esnek



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# Ünver Group started to make production for Aston Martin

Ünver Group started to product radiators and air hoses for Aston Martin that is one of the world's most prestigious automobile brands.



**ÜNVER GROUP**  
**CHAIRMAN OF THE BOARD**  
**AYHAN KORGAVUŞ**

Ünver Group operates with its 180 dedicated employees in the automotive industry in Kayapa Improved Organized Industrial Zone across a land of 13 thousand square meters and has an annual capacity of 2 thousand tons of pulp mixtures. Ayhan Korgavuş, Chairman of Board of Ünver Group, says that they started to supply products to Aston Martin. He remarks "This is a very important step for Turkish industry as well. We started to manufacture radiators and air hoses of Aston Martin cars in our factory in Kayapa Improved

Organized Industrial Zone. We shipped the first lot to Aston Martin a few days ago. I believe that we will be starting to manufacture blow

molding and silicone hoses for this brand very soon. This process will gradually occur. Our current shipment is worth of € 50 thousand. This figure will increase in future shipments."

Stating that they work with main industry manufacturers such as Peugeot, Citroen, Volvo, Ford, Fiat, Volkswagen, Ferrari, Porsche abroad and Fiat Tofaş, Ford Otosan, Isuzu, Otokar, Temsa and Karsan at home, Korgavuş emphasized that their production for FNSS and Otokar in the defense industry continues. He says "Our production continues in three shifts".

Also making evaluations about the failed coup attempt on July 15th, Ayhan Korgavuş says "Stability

is the most important factor that the industrialists expect. Vital developments have been witnessed in our country in the recent years but we faced this unexpected event in the night of July 15th. We recovered from this attempt with the least damage and I believe that we will bind up our small wounds swiftly.

As Ünver Group, we have not experienced any negative impact on our production data. We still continue in three shifts. Our exports are at full speed. Any order deferment or cancellation has not occurred. On the other hand, our R&D and other technological innovations also continue at full speed.

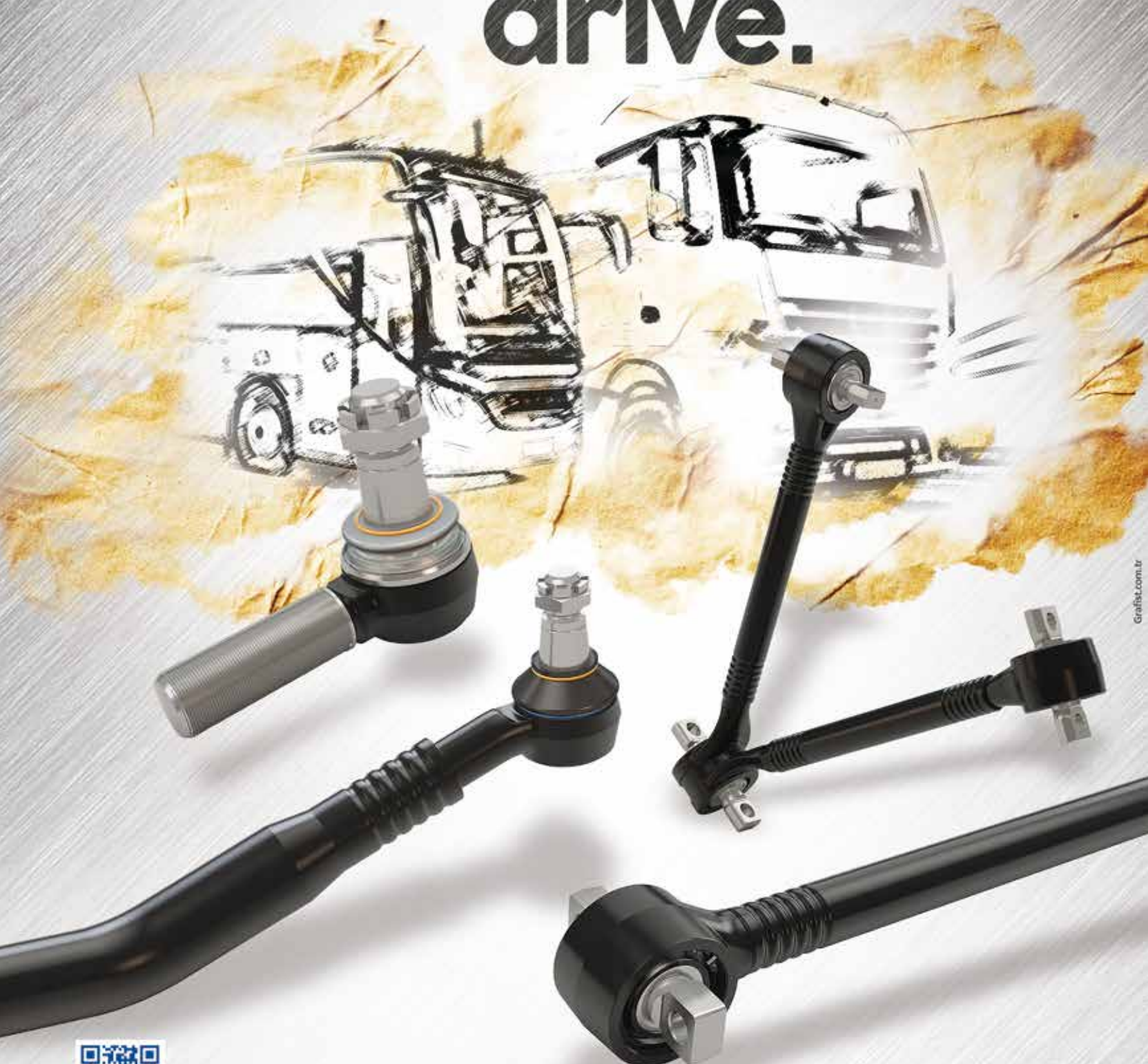
In fact, they must continue. I can say

loud and clear that Europe needs Turkey's exports."

Ünver Group has been started to produce radiator and heating hoses for automotive sector at its plant 160 m in Bursa and has been producing mass production for reinforced hoses since 1986. Ünver Group has started to produce for OEM in 1987 and first exportation has started in 1995.



# Safe & comfort drive.



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### Mercedes-Benz Urban eTruck Concept

Tesla Motors announced a grand master plan that called for an expansion into more segments including electric commercial vehicles such as buses and trucks. Unbeknownst to many is that Mercedes-Benz's trucks unit has been working on electric trucks for some years now and today unveiled a concept that's virtually production ready.

Lamborghini Advanced Composite Structures Laboratory in Seattle, Washington

### Lamborghini looks to carbon fiber for engine parts

Carbon fiber has been slowly making its way into structural components for new cars in order to save weight while adding strength, but up until now no automaker has suggested that the composite could be used for engine internals.

Lamborghini's CEO told reporters in Washington, where it has its Advanced Composite Structures Laboratory, that the company's long-term plan for carbon fiber could include forming internal engine parts from the advanced material.

Carbon fiber connecting rods were the example that new Lamborghini CEO Stefano Domenicali used, reports Automotive News. The executive suggested that the weight of the connecting rods could be cut by as much as 50 percent, which would increase the power output from the engine. Research and development chief Maurizio Reggiani said that the company's successor to its Aventador could be the first model to utilize carbon fiber engine internals when it arrives in the next few years.



### Fully autonomous BMW coming in 2021

BMW, announced a partnership with Intel and Mobileye to help spur the development of autonomous driving technology. BMW says the goal of its partnership with Intel and Mobileye is to get a fully autonomous car on the market by 2021. The firms also hope to establish an open platform for the technology that could be made available to other firms and thus align the industry on a standards-based platform to quickly bring autonomous cars to market.

### Ferrari's next-generation platform to be 15 percent lighter

Ferrari is close to finalizing development of a modular platform that will underpin its next generation of cars starting with a replacement for the California due out in the next year or two. The platform needed to be highly flexible so that it can underpin most of Ferrari's lineup including mid-engine sports cars and front-engined GTs. It also needed to be compatible with rear- and all-wheel-drive setups as well as hybrid technology. It's a strategy already employed by arch rival McLaren, but Ferrari is sticking with aluminum for its platform as opposed to carbon fiber favored by McLaren and a few other supercar marques. Ferrari favors aluminum because of the material's relative ease when it comes to production and maintenance, despite it being heavier and less stiff than carbon fiber.

### GM, NASA create robotic 'power glove'

The RoboGlove is designed for both the health care and manufacturing industries. Its task is simple: To provide humans with additional strength and dexterity while reducing muscle fatigue. For GM, the glove could help assembly line workers or mechanics put cars together or repair them. Swedish medical technology firm Bioservo plans to make use of the glove for medical rehabilitation. The glove makes use of GM's engineering expertise, NASA's space technology, and Bioservo's med-tech experience.



# automechanika

FRANKFURT 13-17 September 2016

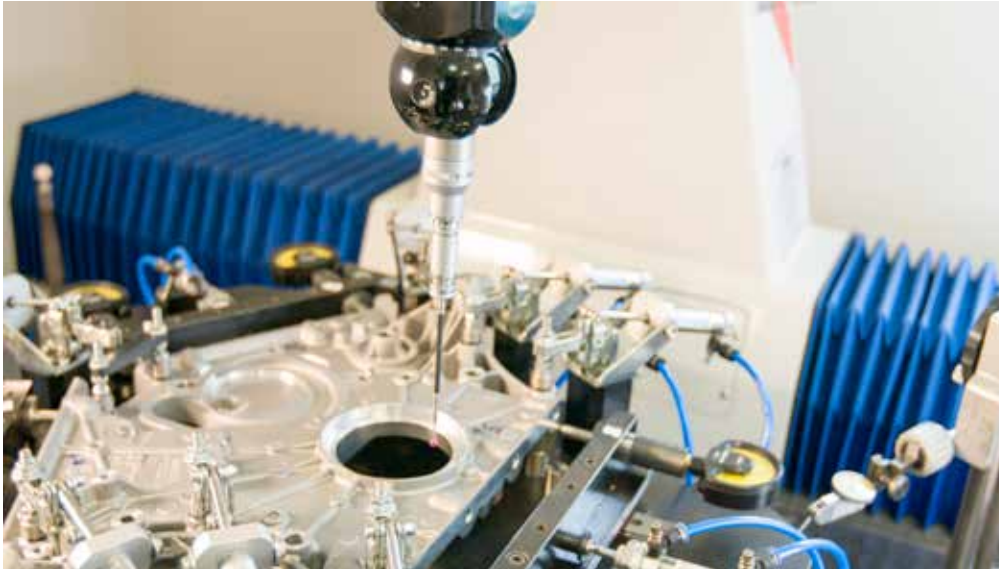
## COMPANY INTRODUCTION PAGES



KIRPART OTOMOTİV PARÇALARI SAN. TİC. A.Ş.



# Choice of Global OEM's Worldwide



such as Oil pans , brackets, covers and different type of bodies.

To support this product portfolio we have 3 main operations Aluminium High pressure die casting, Machining and assembly which includes testing if necessary.

One of our biggest advantage is having these 3 operations under one roof. We are a compact , butique very modern factory which has the biggest investment in Engineering – Development and Machinery.

**Ayşegül Aktulga**  
**Sales & Marketing Manager**

**Could you introduce KIRPART and yourself to us briefly?**

**K**IRPART; located in Bursa Orhangazi is mainly an engine component manufacturer. Originally founded in 1969 with the same concept of business but in 1998 acquired by KIRAÇA group, named as KIRPART and reorganized to be a Full Service Supplier to Global OEMs.

Currently we are around 480 people in the company with 40.000 sqm open and 20.000 sqm covered area. As a %100 Automotive company; %95 of our products are for OEM's and %70 of our turnover is coming from export business.

KIRPART is the only automotive component exporter to China in Turkey and we have a sales and engineering team with a consignment stock warehouse to support our sales activities in China. KIRPART TRADE SHANGHAI Co. located in Shanghai fully owned by our company

Being an engine component manufacturer we are working with all local OEM's that are manufacturing engines in Turkey such as Renault and Ford but as engine production is limited in Turkey our main share is coming from foreign locations.

I am working in KIRPART since 2002, my current position is Sales and Marketing Manager. All sales development activities, Key Accounts and logistic

operations are under my responsibility.

**Could you give some information about operations and products in KIRPART?**

In KIRPART we have 3 core businesses Cooling System Thermostats, Water and Oil pumps and Aluminium High Pressure die cast and machined parts production

**What is KIRPART'S strengths in the sector?**

As I have mentioned above one of our biggest strength is having Casting, machining and assembly under one roof but more important from that our experience in design and validation.

Especially for components such as thermostat and water pumps Kirpart is able





SARIGÖZOĞLU HİDROLİK MAKİNA VE KALIP SAN. TİC. A.Ş.



# Automotive Giants work with Sarigözoğlu



**Interview of Mr. Levent Sarigözoglu that is Assistant Board of Directors in Sarigözoglu**

**Can you mention yourself and your company briefly?**

In 1957, I borned, as well as first base of Sarigözoglu was setted up under the name of Nurçelik by my father Ismail Sarigözoglu in Izmir. After completing primary and secondary education, in the direction of both as my interest area and as father's job, i graduated from Çınarlı Technical High School and then, Mechanical Engineering in Ankara. Nowadays, i am

assistant board of directions in Sarigözoglu that performs with four plants and 850 employee in Automotive sector, in three different cities that are Manisa, Aksaray and Bursa.

In automotive sector, from bigger outer pannel parts of cars, to thick chassis parts and till assembling these parts with robotic welding systems are manufactured in large variety. We are serving to, primary OEMs' in the world, Ford Otosan,

Mercedes-Benz, Oyak-Renault, Bosch, BMW, Volkswagen, Audi, Bentley, Jaguar, Porsche as these brands tooling manufacturing and serial part manufacturing issues.

**Could you give more some details about your manufacturing and products?**

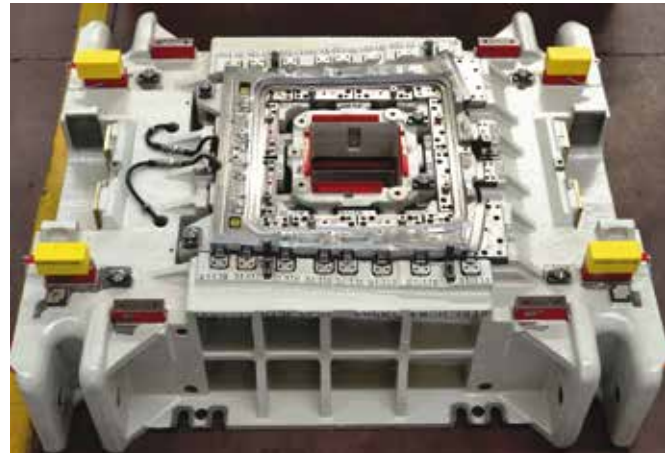
Our special experiment area is all metal press parts that are needed for automotive sector. Before we should see steps of requested to manufacture a part; in result of design, method, simulation, recovery as CAD-CAM processes, 2D-3D operations of tools, assembly and sample press, and reporting of measurement come. After, under-press working are conducted. Adaptation of tools to presses that will be production, pressing of parts and in robotic presses, parts are getting ready for delivery

by assembling in spot-weld and arc weld stations with automation in serial prouction conditions.

First of all, our products, demanded by customers, are the last technological product tools. We must respond to expectation level of these demands. Last year, we applied systems inner our exported products (for Mercedes and Porsche brands) to Europa that assembly, sprig automatic nut and screws. So screws and nuts was sprigged on sheet metal parts, we produced by 15-20 pressings for a minute from transport tools; this gave important efficiency.

**We heard your new investments. Can you mention these investments?**

This year, we gave decision expanding %100 our Aksaray plant for producing cabin and





chassis parts of new model SFTP Euro 6 Mercedes trucks, that will be started producing in Turkey. We are aiming improving service of quality to Turkey and Europe truck producers by Stenhøj clinch machine is entegrated with setted up our new and 5 thousand ton press. We opertionalized new 2 thousand ton hydrolic press on February in our Aksaray plant. While our automation invesments continue fastly, in our 3 plants that have serial production we will increase number of robot two times. I can say that we have advantage because of our current infastructure for industry 4.0 works.

**Well. How do the purchasing opeations continue, while these investments are happening?**

In the purchasing process, our criterias are availability to need, quality, delivery time and price. It is so important that equipped with latest technology. But the spare part and after sale service support are the most important.

In our local-domestics brand preference, for we have machine producers identification, our preference is local producers. In addition that, i mention these brands. For instance; brand of our 2

thousand ton hydrolic press is Hidromode, brand of new laser workbenches is Nukon (Previously, our purchased first three machines were Durmazlar). In Manisa and Bursa, setted up two separate G-3 tandem streets are Powermac-Form Site brand. In robotic automation issue, we make definitely solution association with local entegrator company. As a crane issue, we prefer Güralp and Abra companies.

**What is/are the reason/ reasons that your customers prefer you?**

We used raw material 25 thousand ton in 2012-2013, 40 thousand ton in 2014, 50 thousand ton in 2015. According to fastly growing up our graph, Bursa plant, started in 2009, has important role. We produce by robotic automation in three press streets at Bursa, By pressing raw material, products are getting ready for placing into the case directly by robots capabilities. The biggest street of these is G1 line; is used the biggest press street in automotive industry and until we realize this investment, out of OEM companies, it didn't have to been in any automotive industry company.

Knowledge and flexibility are coming on the



head of our prefeable specifications for us. Due to our customer focus and flexible structure, we improve our qualifications in the customers' demand direction .Sargözoglu has purposed a long forward success with giving education as a school specification as well as it has continuously importance to its workteam . Our biggest advantage is that we have recoverable a machine park by our earnings switch to investments absolutely.

**Can you mention "first" specific success of your company?**

Our company, produced automotive spare parts in the first years, in the following years sub-industry of first refrigerator production, parts of first tractor production performed, that designed hood tools that are need, and produced in automotive industry assembly years.

If it necessary to mention our initials in close time; our company that export automotive tools to USA, is the first company be together with we are first and only company that is included in tool supplier list of Mercedes AMG company.

**As to be in each sector, in the automotive spare part industry qualified employee**

**power is a big defect. As Sargözoglu, do you have any work about that issue?**

For continueable success, we must focus on education. In education issue, as Sargözoglu we are in school-industry association. In that content, we opened apprenticeship school in Manisa Tooling and Pres Metal plant. Our school is coordinated with MEB which gave first graduates in this year, and all graduates were chosen up.

Moreover, within TEV, while "Ismail Sargözoglu Tooling Scholarship" were setted up, nearby 15 years we have supplied scholarship as corparated on the purpose of suppoting technical education through the instrument of TEV.

**Finally, according to that moment's chart, do you achieve your targets in 2016?**

I can say that being the most reformer company as well as due to experience and younger energy of our work shift, we can catch our expectations in 2016. Also increasing capacity investments in especially the second half of this year are getting faster and increasing, that wil continue. ■







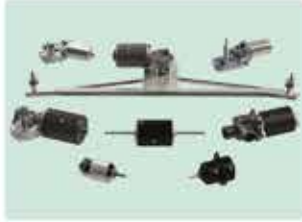
IAA Commercial Vehicle, Hannover  
September 22-29, 2016  
Hall: 11 – Stand No: F17

# ASSAN HANIL IS EMPOWERING YOUR PRODUCTION JOURNEY

Assan Hanil presents unique solutions for your production journey with advanced manufacturing technology and R&D capabilities.



## BAŞKURT MOTOR VE KABLO SANAYİ A.Ş.



Başkurt Motor ve Kablo Sanayi A.Ş. was established in 1966, Istanbul to manufacture cable, cable assembly and heater motor for vehicles. In 2005, new production plant in Sakarya was put into service.

The headquarters is in Istanbul and all production activities are conducted at one complex in Sakarya 1st Industrial Zone.

The production facility is TS ISO 9001, TS ISO 16949 and ISO 14001 certified.

Product design, development, validation, material tests, durability tests and functional tests are all to ensure the product and service quality of Başkurt.

With its wide range of products, powerful engineering capability and customer-oriented approach, Başkurt is a reliable business partner preferred by most national and international customers in commercial vehicle sector.

Main products are dc geared and non-geared motors, HVAC units, copper and aluminum cable, cable assemblies and windscreen wiper systems.



### Contact Information

#### BAŞKURT MOTOR VE KABLO SANAYİ A.Ş.

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www.baskurt.com

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W [www.birinci.com](http://www.birinci.com) E [Info@birinci.com](mailto:Info@birinci.com)

## DELPHI OTOMOTİV SİSTEMLERİ SAN. VE TİC. A.Ş.



### DELPHI: A WORLD-LEADING TECHNOLOGY COMPANY

Delphi Automotive is a high-technology company that integrates safer, greener and more connected solutions for the automotive sector. Headquartered in Gillingham, U.K., Delphi operates technical centers, manufacturing sites and customer support services in 44 countries. Delphi's global revenue reached \$15.2 billion in 2015.

Delphi presence in Turkey dates back in 1970 and today Delphi has 2 Electrical/Electronic Architecture Plants, 1 Diesel Plant including Delphi Product & Service Solutions (DPSS) Aftermarket Centre and 1 Training & Distribution Centre in Izmir and 1 Aftermarket Sales office in Istanbul.

Delphi Diesel Systems Turkey in Izmir specializes in the production of diesel fuel injection components as a leading common rail factory. In December 2011, Delphi laid the foundation of the new diesel facility in Izmir which started production in July 2013 to strengthen the group's position by providing an efficient manufacturing base to support future customer projects.

With a legacy of more than 100 years of OE heritage, Delphi provides its customers with the parts, accessories, services and support they need to deliver a positive vehicle ownership experience throughout the life of the vehicle.

Today, Delphi is one of the leading aftermarket suppliers globally. DPSS provides product for the independent aftermarket, diesel aftermarket, and original equipment service and accessories.

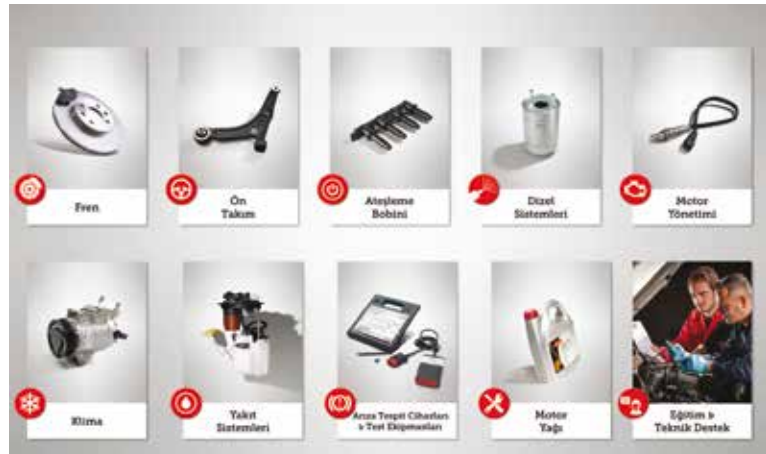
### AN OE ENGINEERING APPROACH TO SAFETY CRITICAL PARTS

#### It's All in the Details

From braking to steering and suspension to shock absorbers, Delphi is all about the details when it comes to delivering safety-critical parts to the aftermarket.

Details that include stringent product testing and OE technologies, all supported by comprehensive diagnostics and training. Delphi is committed in delivering an OE engineering approach with aftermarket flexibility to safety-critical parts.

What does this mean for you? Faster, more efficient repairs... and a safer, more enjoyable driving experience for your customers.



#### Contact Information

**DELPHI OTOMOTİV SİSTEMLERİ SAN. VE TİC. A.Ş.**  
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Price

### OUR COMPANY

Dönmez Debriyaj is a global clutch manufacturer, with its wide range clutch discs, clutch cover assemblies, release bearings and flywheels for Heavy Duty Commercial Vehicles, at an original equipment quality level with its brands as "Dönmez" in local market and as "Hammer Kupplungen" in worldwide 60 different export markets.

Joining 30 years' experience with market trends develops its reinforced products, which has longer lifetime and higher performance. Capability and sufficiency of us to develop and produce our own products according to the international original equipment manufacturers quality standards, is guaranteed by ISO/TS 16949 Quality Certificate.

Our company's one of the targets is to ensure Sustainable Social Development. This environmental friendly intend is certified by ISO 14001.

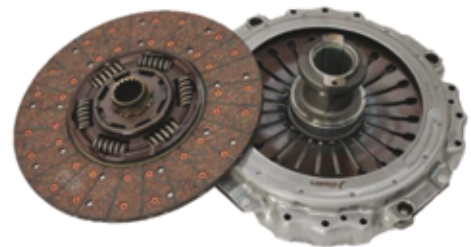
With its flexible production system, we are able to fulfill various customer demands within short term production lead time.

### OUR PRODUCT

We believe that "100% Customer Satisfaction" is the key driver of our success behind our quality and competitive products, with its through strong Retail network and After Sales Technical Service.

Our representatives regularly visit our customers and follow the latest market trends and customer demands. Key driver of the customer satisfaction is the way how to handle with the problems and offering permanent solutions to the problems. Our well experienced After Sales Technical Service representatives, with all their valuable experiences, give quick response to the customer problems and provide all the support to our valuable customers.

In independent aftermarket our products are under guarantee for 1 year or 100.000 km. against all claims due to the problems which are caused by the production process



### Contact Information

**DÖNMEZ DEBRİYAJ SANAYİ VE TİCARET A.Ş.**  
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## EKOL LOGISTICS



## EKOL LOGISTICS


With a focus on customer satisfaction, Ekol Logistics has aimed to become the leading brand of its industry in Europe since its establishment in 1990. It began in the field of international transportation organization and soon created an integrated company structure providing third-party logistics services. Ekol offers logistics and supply chain solutions to its customers from various industries with its know-how obtained from many years of experience, qualified human resources and state-of-the-art technology.

With a turnover of 504 million Euro, Ekol is among the leading integrated logistics service providers both in Turkey and Europe thanks to its facilities in Turkey, Germany, Italy, Romania, France, Greece, Ukraine, Bosnia, Hun-

gary, Spain, Poland, and Bulgaria, covering a total area of 750,000 square meters. It boasts an eco-friendly fleet of 5,000 vehicles and a staff of nearly 6,500.

Ekol presents industry-focused solutions to automotive and sub-industry manufacturers like BMW, Honda, Mercedes, Tofaş, Renault etc. in automotive logistics with a significant 30 percent of its total turnover. Ekol creates models of warehousing and distribution systems while considering the changing needs of its customers. Ekol's service approach involves facilitating the management of customer's international facilities through the immediate loading of manufactured goods using the "just-in-time" philosophy, establishing web-based order management systems between customers and suppliers, enhancing sub-industry supply chains with the "milk-run" system, and supporting production planning with early notification and reduced transport times.

## Contact Information

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 [info@ekol.com](mailto:info@ekol.com)

## ERMETAL OTOMOTİV VE EŞYA SANAYİ TİCARET A.Ş.



### OUR COMPANY

ERMETAL Automotive was established in 1978 in accordance with the developments of Turkish Automotive Industry, but the company's roots go back to 1972 – to the foundation of ERKALIP – one of the most important manufacturers of tools and auxiliary equipment in Turkey. ERMETAL, however, was founded for the purpose of stampings and assembly part production. Those two companies managed to achieve huge success, which, as a result, led to establishment of ERMETAL Business Group, consisting of five companies, working in various sectors of Turkish industry. Still, it is worth to mention that ERMETAL occupies the leading

position in the market as a manufacturer of roof, chassis, closure and body parts, as well as steering columns for automotive industry with an improved machine park by acquiring 250 Tons to 1630 Tons double action presses, more than 30 spot and MIG/Mag welding robots. ERMETAL is Tier 1 supplier of FIAT, RENAULT, FORD, TOYOTA with 93 million Euro turnover – place of work for 870 employees and owner of 28,000 square meters of production area as one of the 500 biggest companies in Turkey. Accordingly, ERMETAL has a R&D center to serve to Automotive Industry with its 33 engineers, 26 technicians and 5 support staff.



### Contact Information

#### ERMETAL OTOMOTİV VE EŞYA SANAYİ TİCARET A.Ş.

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www.ermetal.com

info@ermetal.com

**ESTAS CAMSHAFT INDUSTRY CO.****OUR COMPANY**

ESTAS was founded in 1977 in Sivas, Turkey, and was the first company to produce camshafts in the country. After supplying camshafts for the aftermarket in the early years, ESTAS moved on to the production of camshafts as original equipment (OEM) and today supply camshafts to 16 different vehicle manufacturers for their engines. Besides the original equipment market, ESTAS also exports camshafts to the aftermarket in 40 countries across the world. The current production range of ESTAS consists of more than 1900 different camshafts varieties. ESTAS is based in Sivas on a 112.592 m<sup>2</sup> plot of land with a 69.592 m<sup>2</sup> building where the camshafts are produced in a foundry for chilled castings and a specialist machining plant.

As the camshafts are made from the chilled cast blanks provided from the neighbouring ESTAS foundry, the ma-



chining plant has the capacity to produce 550,000 camshafts per year with one shift.

The plant is equipped with induction hardening, flame hardening and gas carburising facilities in order to harden forged steel and steel camshafts and also has a phosphate bath facility. The production is performed by 357 skilled and experienced employees on CNC and machines.

As a result of being an OE supplier, ESTAS implements quality control in all processes of the production. ESTAS also has TUV NORD TUVISO 9001, ISO/TS 16949 and Global-Group ISO 14001, OHSAS 18001 certifications.

**Contact Information****ESTAS EKSANTRİK SAN. VE TİC. A.Ş.**

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+90 (346) 218 12 31

www.estas.com.tr

@ estas@estas.com.tr

## FEKA OTOMOTİV MAMÜLLERİ SAN.VE TİC. A.Ş.



Feka is an international leading company in the global automotive supply industry, established in 1988 at Bursa and providing parts for major OEM companies within Turkey and around the globe.

### CAPABILITIES

- ◀ 863 qualified personnel
- ◀ R&D Center
- ◀ Moldshop in house
- ◀ Approved quality laboratory
- ◀ Production area of 23.000 m<sup>2</sup>
- ◀ Certificates: ISO 16949/14001/Q1

### PRODUCT GROUPS

- ◀ Interior & Exterior lightings
- ◀ Internal & External mirrors
- ◀ Assembled trim parts
- ◀ Tanks

### MAIN CUSTOMERS

- ◀ Alfa Romeo
- ◀ Daimler
- ◀ Fiat
- ◀ Ford
- ◀ GM
- ◀ Hyundai
- ◀ Maserati
- ◀ Porsche
- ◀ PSA
- ◀ Renault
- ◀ Toyota
- ◀ VW Group

### Contact Information

#### FEKA OTOMOTİV MAMÜLLERİ SAN.VE TİC. A.Ş.

Organize Sanayi Bölgesi Ali Osman Sönmez Bulvarı No:13-B 16140 Nilüfer / Bursa - Turkey

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@ [info@fekaautomotive.com](mailto:info@fekaautomotive.com)

## GREEN Chemicals A.Ş.



## OUR COMPANY

GREEN Chemicals is a multi-partnered company established in 1995. Providing service for;

- Water Treatment (WET-Treat®)
- Waste Water Treatment (WASTE-Treat®)
- Metal Surface Treatment (MET-Treat®)
- Oil & Gas Technologies (OIL-Treat®)
- Adhesives (GREEN ADH-Tech®)
- Mining Technologies (MINE-Treat®)
- Geothermal Technologies (GEO-Treat®)
- Engineering Areas

Operating nationally and internationally, GREEN Chemicals is a leader company always displaying continuous growth and high performance. Our offices are located in Turkey, Europe, UK, Brasil, Africa, Iran, Russia, Middle East and Azerbaijan. GREEN Chemicals exports to 35 different countries.

With a strong R&D unit supported by universities and international firms represented by the company as well as its local and foreign engineers trained at doctorate level; our expert teams closely follow up new technology. GREEN Chemicals reserves 6% of the revenue to R&D activities. Within this direction, our high quality environmentally-friendly products designed by our expert teams

are introduced to the industry through reliable and economic services by means of our engineers whose first priority is customer satisfaction.

GREEN Chemicals has;

- 12000 m<sup>2</sup> factory & office area
- 50000 ton/year production capacity
- 7000 pallet capacity

Our purposes are;

- To keep a close watch on newest technology and to use it in our processes,
- To decrease input cost of companies prioritizing / increasing the quality at the same time,
- To protect process life and provide long life,
- To maximize process efficiency, minimizing operating cost at the same time.

GREEN Chemicals has adopted a principle to provide the best services to the industry in the most economic manner by means of both its own expert team as well as national and international dealer chain composed of 300 people.

All our products are produced in our factory that has ISO 9001, ISO 14001, ISO 18001, TS 16949, QUALICOAT, Halal, Kosher, NSF certificates.

GREEN Chemicals is awarded as the most successful chemical company in 2015.



## Contact Information

## GREEN Chemicals A.Ş.

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+90 (262) 781 80 70



www.green-chemicals.com



green@green-chemicals.com



## HAKSAN OTOMOTİV MAMÜLLERİ SAN. VE TİC. A.Ş.



### OUR COMPANY

Haksan Otomotiv was founded at 1988 with the purpose of supplying rubber parts requirements of automotive sector. With it's self developing structure, quality perspective and technological investments, Haksan has become globally one of the most valuable automotive sub-parts manufacturer in it's area. In today, Haksan makes direct sales over 20 countries and realises it's turnover's close to 50% amount by export sales. Haksan has three production plants in Bursa classified according to their production types which are rubber injection molding, rubber formed hoses and rubber extrusion and also has another production plant in Manisa.

Since 2006 Haksan also continues production in it's Russia factory to serve this region. In 2013 Haksan removed Bursa headquarters plant to a new location to increase capacity. For extending product range Haksan has also started plastic injection production with a new machine park after this relocation. In 2014 to serve a better technical and commercial service to customers in Europe and to use as a warehouse, a new office is organized in Germany which is called Haksan GmbH. Haksan has a wide range of products which are mainly rubber anti-leakage and anti -vibration gaskets, engine air ducts, cable grommets and bellows, radiator and turbo hoses, car window seals, silent blocs and others. Raw material is prepared in Haksan's own compound production lines.



### Contact Information

**HAKSAN OTOMOTİV MAMÜLLERİ SAN. VE TİC. A.Ş.**  
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+90 (224) 411 11 34 +90 (224) 411 11 43 www.haksanotomotiv.com @ haksan@haksanotomotiv.com

## HEXAGON STUDIO



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Having succeeded in more than a hundred development projects in design and engineering since its foundation in 2006, Hexagon Studio takes justified pride of being a long-term solution partner for its industry stakeholders. We provide turnkey engineering solutions to the industry by utilizing unique technological approaches in response to challenging demands and requirements from its customers. Reserving "being one of the leading R&D centers in Europe in 2020" as its primary objective, Hexagon Studio positions itself as a trend setter in conceptual design and a solution developer in "Sustainable Mobility Solutions" for the welfare of the society. With this vision in mind, the company has completed the following major design and development projects.

- Karsan Concept V1 – "Taxi of Tomorrow" for NYC
- Bi-fuel light commercial vehicle
- Euro VI minibus/midi-bus for public transport
- Hybrid public bus
- Euro VI DSL/CNG solo and articulated public buses
- Full EV minibus with range extender

We take full advantage of our integrated infrastructure for prototype manufacturing and design validation/verification both at laboratory level and on-road vehicle testing in our product development process.



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linkedin.com/company/hexagon-studio

## Contact Information

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www.hexagonstudio.com.tr

İNÇİ GS YUASA AKÜ SAN. VE TİC. A.Ş.

# İNÇİ GS YUASA



## OUR COMPANY

Inci Akü A.Ş. was established by Cevdet Inci in 1984 in Manisa Organized Industrial Zone.

Inci Akü, the flagship of Inci Holding, started its first works with vehicle manufacturers in 1985.

In 2009, Inci Akü had the first R&D center in battery sector, the company was awarded with first TURQUALITY certificate in its sector in 2010.

It ranked 229th in study of Istanbul Chamber of Commerce regarding the largest 500 industrial companies of Turkey in 2015. Inci Akü is the most valuable brand of battery sector in "Turkey's Most Valuable Brands" top 100 list prepared by Brand Finance, a brand valuation company.

Inci Akü joins its strength in this field with Japanese giant

GS Yuasa's global experience and vast knowledge on new generation battery Technologies. This partnership turns the title of the company into Inci GS Yuasa Akü Sanayi ve Ticaret A.Ş.

Inci GS Yuasa has 2 production facilities in Manisa and Sales Office in Istanbul. Its second facility in Manisa has the feature of being the first BREEAM certificated production facility of Turkey.

Inci GS Yuasa is the "export leader" of its sector with exporting to over 80 countries in 4 continents and uses the brands Inci Akü, EAS, Hugel, Blizzaro in automotive, heavy-duty and marine vehicles industries. Moreover, it uses its Inci Battery brand in the industrial produce sector.



## Contact Information

### İNÇİ GS YUASA AKÜ SAN. VE TİC. A.Ş.

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info@incigsyuasa.com



**KALE BALATA OTOMOTİV SAN. VE TİC. A.Ş.****OUR COMPANY**

Kale Balata was established in 1976 in Istanbul, Turkey engaged in the manufacturing of friction materials like brake pads, brake linings and brake shoes for passenger cars as well as light, medium and heavy duty commercial vehicles.

Kale has steadily grown from its very beginning to a solid supplier of friction materials to the local and international markets .

The quality of Kale Balata products is based on long term investment in research and development in conjunction with automotive brake system manufacturers and the use of modern and advanced manufacturing equipments.

Mixtures of Kale balata are prepared free from human touch by automatic dosing lines according to valuable fine recipes developed by Kale Balata Laboratories and only Turkish & European Union

origin, ISO 9001 certified raw materials are used in the production.

Kale Balata products are tested and approved according to ECE-R 90 regulations at independent prestigious Laboratories of Europe to ensure that they perform +/- 15% similar to the Original Parts.

60% of Kale Balata Products are produced for OEM and OES markets, which are directly assembled on the vehicle or distributed as the replacement parts for vehicle manufacturer's authorized service stations.

**Contact Information****KALE BALATA OTOMOTİV SAN. VE TİC. A.Ş.**

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## NORM CİVATA SAN. VE TİC. A.Ş.



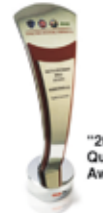
"2016 R&D  
Category  
Third Place Award"



"2014 FORD's  
Best Supplier"



"2011 FORD's  
Best Supplier"



"2012-2013 TOFAŞ's  
Quality & Performance  
Award"

### OUR COMPANY

NORM GROUP based in İzmir/Turkiye is the leading manufacturer and exporter of Fasteners, Steel Bolts and Nuts in Turkiye. Production capacity reaching up to 90.000 tons/year. A family owned private company with all in-house processes

like, cold forming, heat treatment, McDermid licensed zinc-zincek nickel, Doerken and Geomet licensed zinc flake platings, secondary operations, tooling design, tooling manufacturing and logistics services.

Research & Development Center has 62 engineers working on patented products, process development, product design. Already holds 3 registered patents as well as MATHread® MATpoint® M Point® products.

ISO TS 16949:2002 Quality System approved in 2003 by BUREAU VERITAS, ISO 14001 by TSE and Q1 by Ford Motor Co. in 2004, as well as OHSAS 18001.

Quality Department has a Laboratory Accreditation Certificate.

Trademark "NORM" has been registered in EUROPE as well as in the U.S & Canada.

EXPORTING SINCE 1994 to 35 countries around the world. Advance warehouses in France and Germany give service direct to OEMs.

### OEM REFERENCES

VW Group, FORD Motor Co., BMW, Fiat-Tofaş, DAIMLER Truck, Mercedes Benz Turk Truck and Buses, MAN Turkey, ISUZU, Karsan, Otokar, Valeo, BMC, Iveco, Ford-Otosan, Oyak Renault, VOLVO, SCANIA Trucks, as well as first Tiers like ZF, Wabco, Knorr-Bremse, Johnson Controls CRH.

### PRODUCT RANGE

Flange Bolts both Small & Heavy Series, Ball joints/studs, Wheel Bolts / studs, Hexagon and hexalobular internet and external drive bolts and screw, sems screws, weld Bolts & Nuts, Rivet Nuts, Hexagon Thin Nuts, Round and Square Weld Nuts, Hexagon Nuts with Flange, Special Bushes, spacer sleeves.



### Contact Information

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**Stock Systems**

- a. Standard Steel Pallet
- b. Special Steel Pallet





“Meet The Perfection Of Spring Manufacturing”



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#### COMPRESSION SPRINGS

Produced as cylindrical, conical, biconical, barrel and with or without grinded/turned ends according to customer's specific requirements and needs.



#### EXTENSION SPRINGS

Manufactured as with or without adjacent coils such as standard hooks and German & English or custom designed loops.



#### TORSION SPRINGS

Made according to customer's requirements as single or double torsion with simple or complex spring legs.



#### PISTON RING SPRINGS

Produced as ground or unground with single or double pitch, with latch pin for piston rings in motor engine.



#### SHAPED SPRINGS FROM WIRE

Manufactured parts by using round wire for different purposes and designed and produced such as simple and complex shapes. Used on manual apparatus for difficult parts. Applied for static and dynamic specifications.



#### SHAPED SPRINGS FROM FLAT WIRE & STRIP

Produced by using flat wire and strips in different size according to customer's demands on CAD. Such as components for fixing top art circlips on multislide m/c as Bihler, Wafios etc.



#### HOSE CLAMPS (NORMAL - SCREW TYPES)

Manufactured as two type of hose clamps classified as MKY (spring type) and MKV (screw type). MAKTEL "Hose Clamps" are zinc coated and totally Cr+6 free. Special type of clamps are made for customer needs.



Büyükbakkalköy Mahallesi Samandıra Caddesi No:40 34858 Maltepe/İSTANBUL  
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**AUTOMECHANIKA**  
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**13-17 SEPTEMBER, MESSE**  
**HALL 4.0 BOOTH A72**

# ENGAGE INNOVATION

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**ENGAGE.**

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opsan

Shapes the future

Quality is a lifestyle

O O R PRODUCTS

Opsan started industrial life more than 50 years ago and entered the automotive sector in 1976 by supplying chrome coated bumpers. Today, Opsan is a leading producer of body, seating and chassis parts for automotive customers in Turkey and abroad. Opsan operates on 30.000 square meter area with 450 employees. Opsan specializes in pressing, welding and assembly processes.

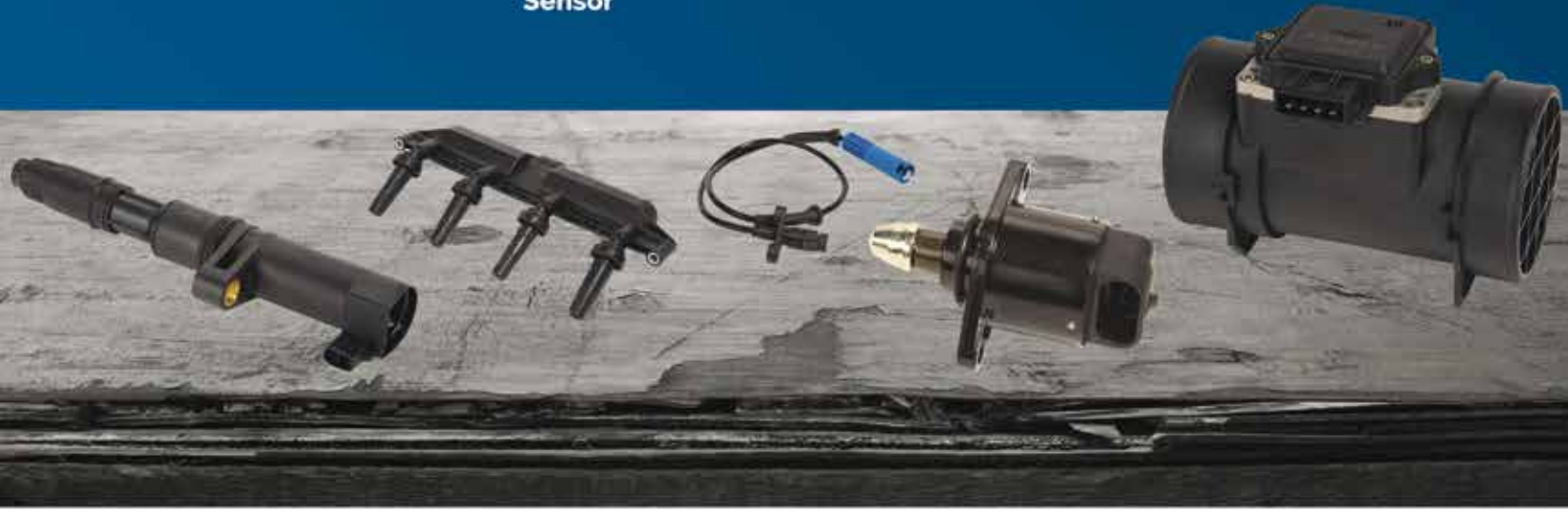


In year 2010, Opsan and Linde+Wiemann founded Linde Opsan, a joint venture company to produce high strength rollformed and welded products for chassis, seating, body and bumper applications.



**OPSAN Orijinal Sac Parça San. ve Tic. A.Ş.**  
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# THE ULTIMATE POWER OF **DODUCO** BRAND



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Intermotor  Lucas 

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## ÖZLER PLASTİK SAN. VE TİC. A.Ş.



### OUR COMPANY

In all Özler Plastik Plants that are constantly renewed and developed, various kinds of innovations of advanced technology, particularly automation, are applied. Beside Özler's core production methods of Suction Blow Molding and Conventional 2D Blow Molding Technology, Foam Duct applications are available and Injection Molding method is also applied in a wide range of products. Especially using these leading methods and thanks to its 65 years experience of a substantial range of plastics, Özler offers plastic products of high quality and advanced technology for the Automotive, Truck, Durable Goods & White House Appliances, Thermotechnic and Packaging Industries. Özler operates 4 Blow Molding Plants, 1 Injection Molding Plant and 1 Tool Construction Plant in

Turkey and has offices in Germany and Spain. Thanks to its Research and Development Center which has ties with Universities both in Turkey & USA plus Engineering Office partners and Resident Engineers in Germany and Spain and Prototype Production methods with Additive Manufacturing technology; Özler provides Full Service Supplier Design and Development Partnership for Powertrain and HVAC Zone Projects of different OEMs from all around the world. Özler's main product range covers Engine Zone ducts, Turbo Charger & Resonator ducts, HVAC ducts, Thermotechnic Pipes, Windscreen & Washer Bottle Systems, AD Blue Tanks and various type of other plastic products.



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# SOUNDPROOFING

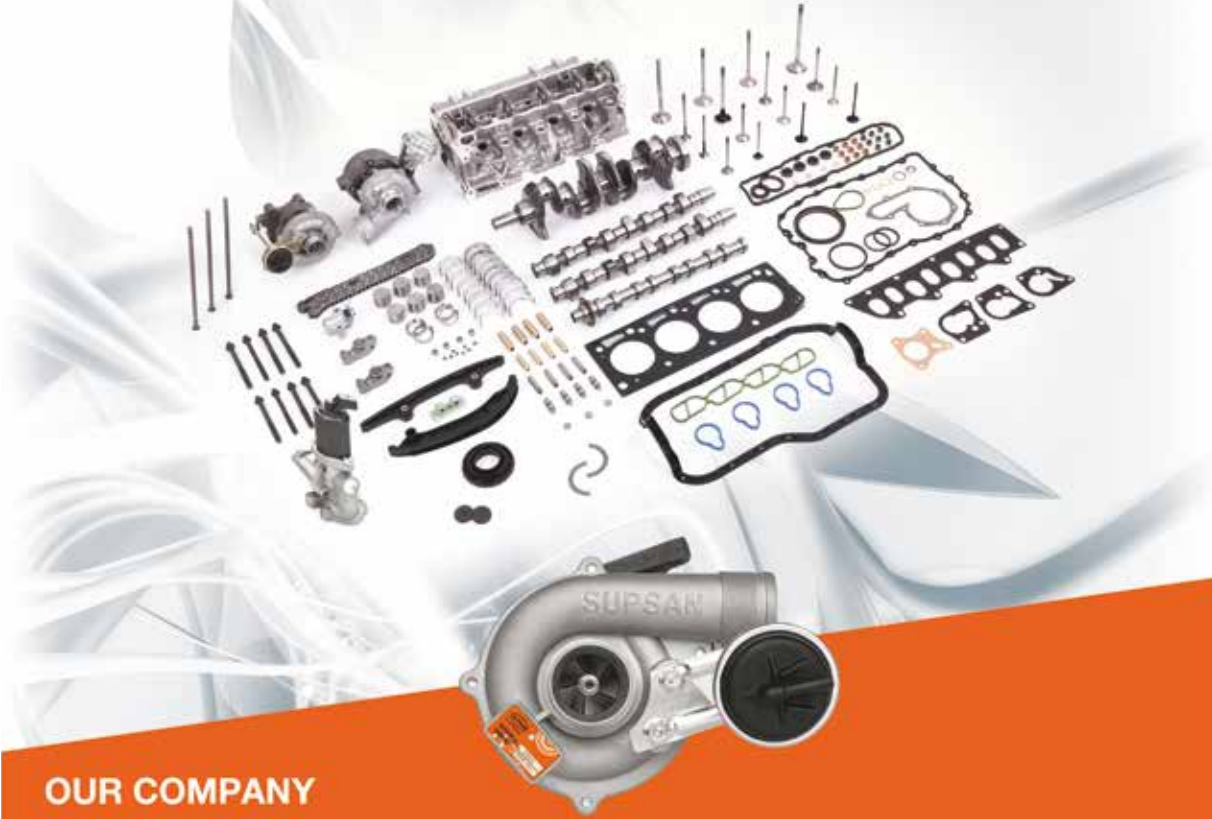
## SOUND ISOLATION PHASES

- 01 Sound Power Noise Measurement
- 02 Acoustic Analyze With Finite Element Method By Software
- 03 Acoustic and Mechanic Design
- 04 Manufacturing Soundproof System Based on Acoustic Analyze
- 05 Disassembly & Assembly Operations
- 06 Electrical & Automation Modifications
- 07 Soundproofing Approval - After Soundproofing Implementation



## SUPSAN MOTOR SUPAPLARI SAN. VE TİC. A.Ş.

**SUPSAN**  
Engine Parts



### OUR COMPANY

Supsan is a Borusan Holding company, started production on 3rd of September 1970 under the license of Eaton SRL. Supsan produces engine valves, pushrods, camshaft, turbocharger in the same facility. Supsan also distributes guides, valve cotters, valve inserts, gasket set, valve lifter, engine bearings, cylinder head, head bolt, shim, valve stem seal, timing chain set, EGR valve, valve spring, air flow meter through aftermarket channels. Supsan is certified by TÜV CERT which is an international certification institution, for its quality management system of ISO / TS 16949.

**BORUSAN**  
COMPANY

In its own business environment Supsan is a leading producer in Turkey. Valve requirements of Ford Otosan, Oyak Renault, Tofaş, Türk Traktör, Iveco, Anadolu Isuzu, Başak Traktör, Karsan, Otokar, Daf Tirsan, Yavuz Mühendislik, Temsa are supplied by Supsan. Among export customers Ferrari, Aston Martin, BMW, Mercedes Benz, Volkswagen, Fiat, Ford, Iveco, Daf, Volvo, Renault, Dacia, Nissan, Peugeot, Volvo Penta, Isotta Fraschini, VM Motori, Detroit Diesel, GM, Chrysler, John Deere, YaMZ may be listed.

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## YENMAK OTOMOTİV A.Ş.



Head Office & Logistics

Yenmak, as a small atelier was founded in Konya by Kahvecioğlu family in 1965. Over the years, Yenmak constantly renewing and improving itself regardless of engine parts supplier on domestic and abroad was one of the largest suppliers worldwide.

Yenmak today KIT, PISTONS, PISTON PIN, PISTON and CYLINDER ENGINE LINER production and with supply SEAL, VALVE, ENGINE BEARING; these products are exported to more than 91 different countries on 5 continents.

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www.yenmak.com.tr

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In addition, knowing that most important of all components of the human factor YENMAK gives considerable importance and value of customer relationships.

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