

TÜDÖKSAD TAŞIT KOMİTESİ TOPLANTISI

Toplantı Tarihi: 05.12.2023

Toplantı Yeri: Erkunt Sanayi A.Ş.



erkunt
SANAYİ A.Ş.
70-YIL
START WALK

European Foundry Industry Sentiment Indicator (FISI) and Business Climate Indicator Euro Area (BCI)

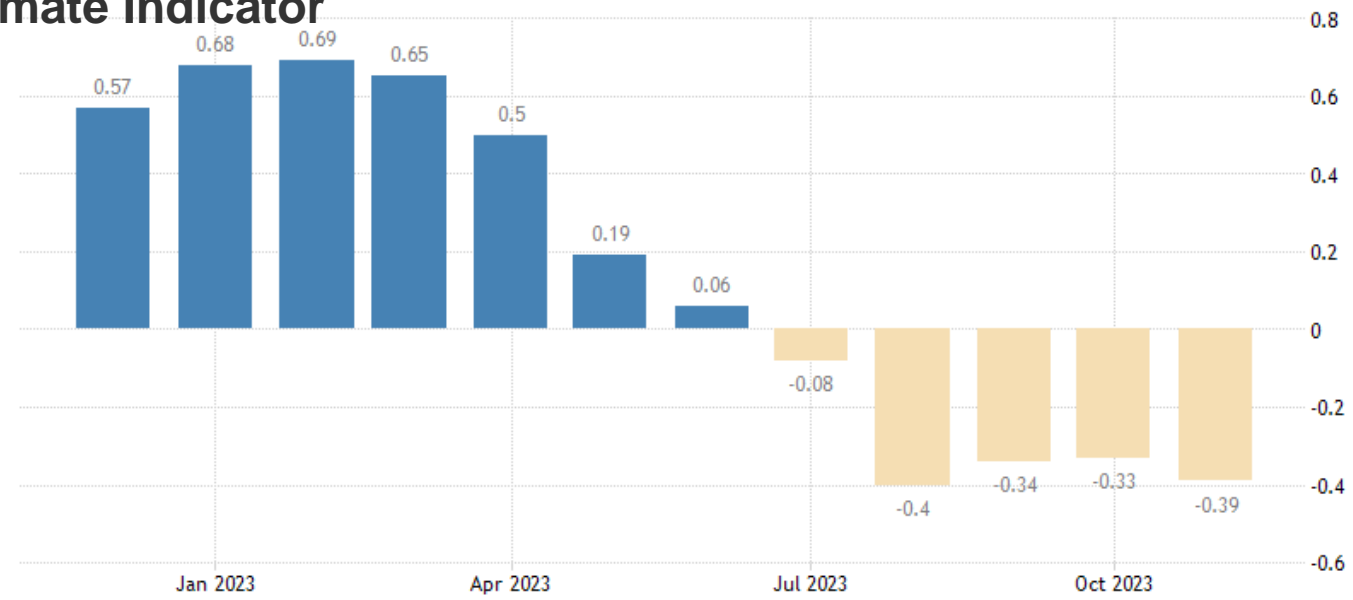
October 2023



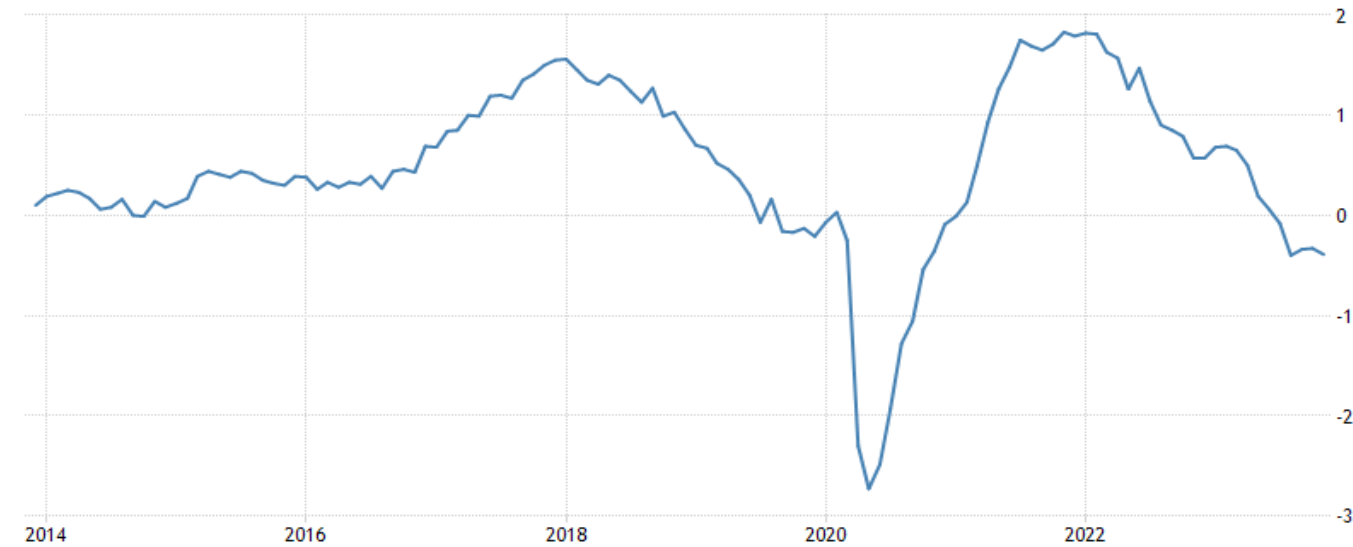
Source: FISI: CAEF, country weight based on production 2020
BCI: Eurostat, calculation CAEF

— FISI — BCI

Euro Area Business Climate Indicator

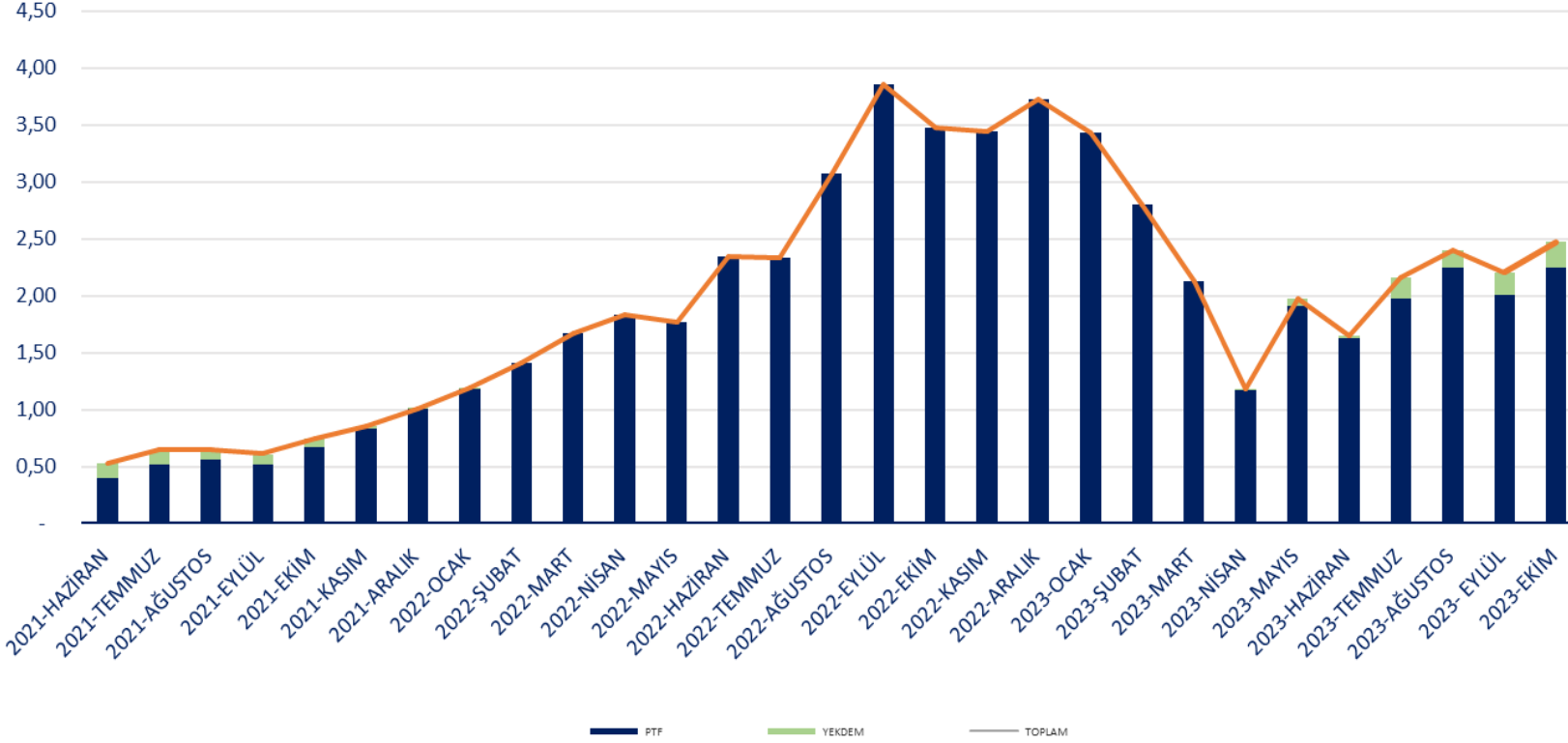


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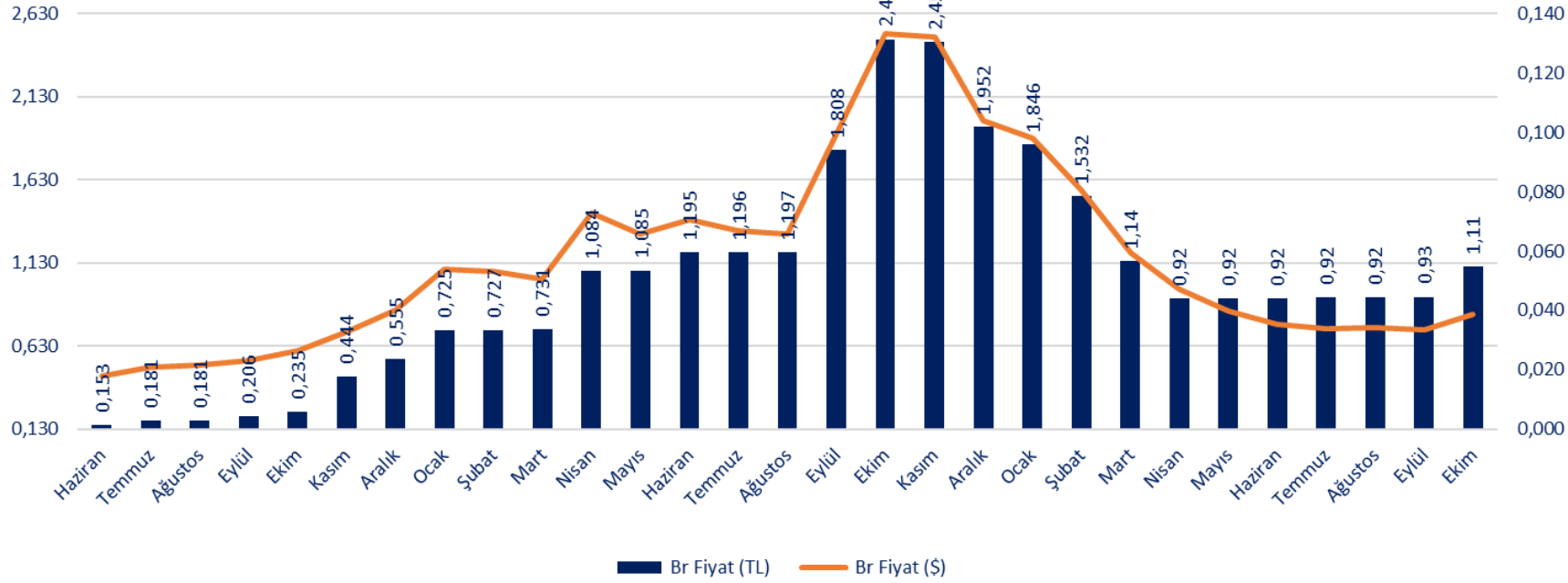
Unit Price TL/kwh



| DÖNEM | PTF | YEKDEM | TOPLAM |
|--------------|------|--------|--------|
| 2021-HAZİRAN | 0,40 | 0,13 | 0,53 |
| 2021-TEMMUZ | 0,52 | 0,13 | 0,65 |
| 2021-AĞUSTOS | 0,56 | 0,09 | 0,65 |
| 2021-EYLÜL | 0,52 | 0,09 | 0,61 |
| 2021-EKİM | 0,67 | 0,08 | 0,75 |
| 2021-KASIM | 0,83 | 0,02 | 0,85 |
| 2021-ARALIK | 1,01 | 0,00 | 1,01 |
| 2022-OCAK | 1,18 | 0,01 | 1,19 |
| 2022-ŞUBAT | 1,40 | - | 1,40 |
| 2022-MART | 1,67 | - | 1,67 |
| 2022-NİSAN | 1,83 | - | 1,83 |
| 2022-MAYIS | 1,76 | - | 1,76 |
| 2022-HAZİRAN | 2,34 | - | 2,34 |
| 2022-TEMMUZ | 2,33 | - | 2,33 |
| 2022-AĞUSTOS | 3,07 | - | 3,07 |
| 2022-EYLÜL | 3,85 | - | 3,85 |
| 2022-EKİM | 3,47 | - | 3,47 |
| 2022-KASIM | 3,44 | - | 3,44 |
| 2022-ARALIK | 3,72 | - | 3,72 |
| 2023-OCAK | 3,43 | - | 3,43 |
| 2023-ŞUBAT | 2,80 | - | 2,80 |
| 2023-MART | 2,13 | - | 2,13 |
| 2023-NİSAN | 1,17 | 0,01 | 1,18 |
| 2023-MAYIS | 1,91 | 0,07 | 1,98 |
| 2023-HAZİRAN | 1,62 | 0,03 | 1,65 |
| 2023-TEMMUZ | 1,98 | 0,19 | 2,16 |
| 2023-AĞUSTOS | 2,25 | 0,14 | 2,39 |
| 2023-EYLÜL | 2,01 | 0,20 | 2,20 |
| 2023-EKİM | 2,25 | 0,22 | 2,47 |

Elektrik Maliyetleri

Doğalgaz Birim Fiyat (TL/kWh; USD/kWh)



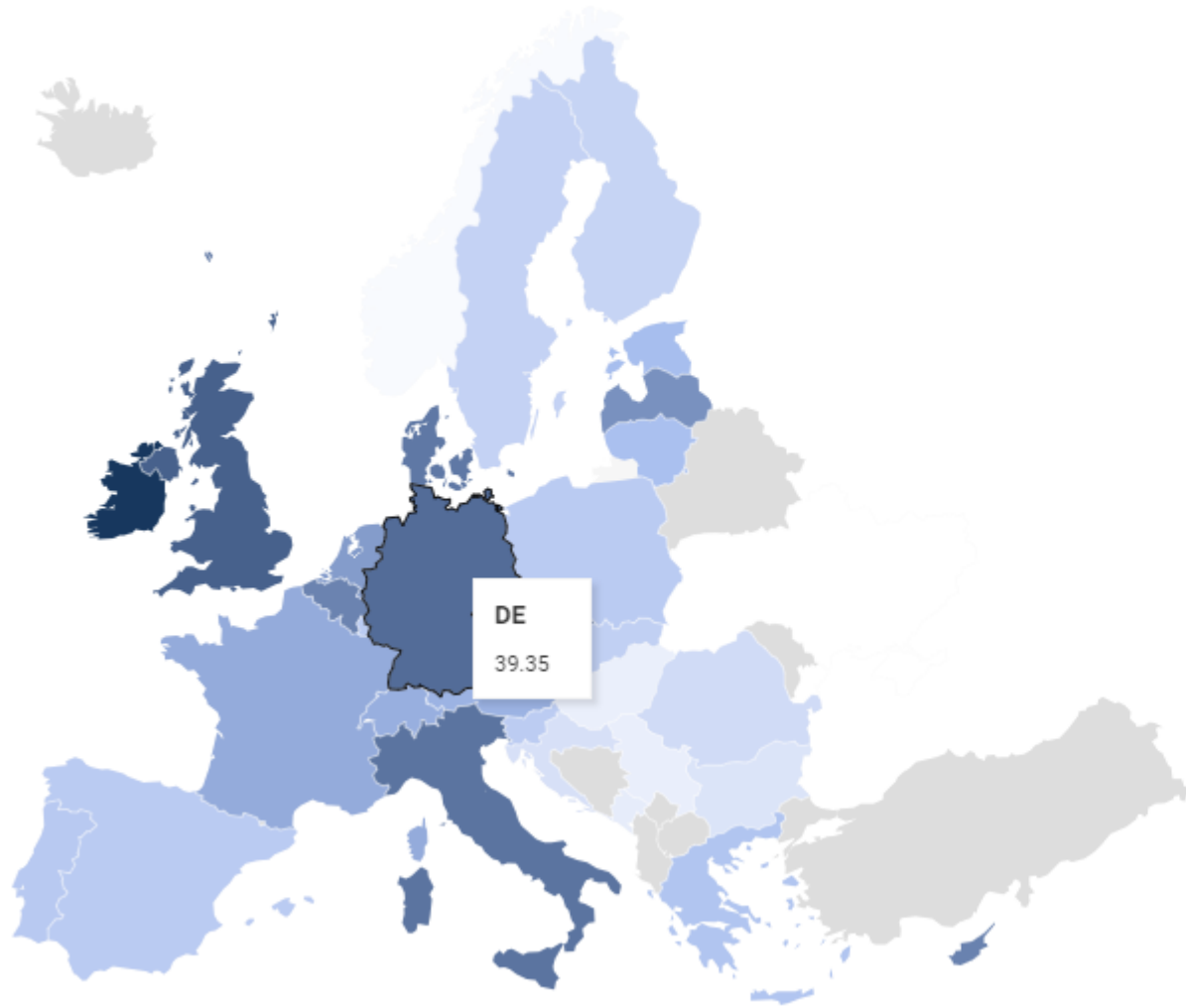
| Yıl | Ay | Br Fiyat (TL) | Br Fiyat (\$) | USD Kuru |
|------|---------|---------------|---------------|----------|
| 2021 | Haziran | 0,153 | 0,018 | 8,596 |
| 2021 | Temmuz | 0,181 | 0,021 | 8,588 |
| 2021 | Ağustos | 0,181 | 0,022 | 8,410 |
| 2021 | Eylül | 0,206 | 0,023 | 8,882 |
| 2021 | Ekim | 0,235 | 0,027 | 8,870 |
| 2021 | Kasım | 0,444 | 0,033 | 13,580 |
| 2021 | Aralık | 0,555 | 0,040 | 13,830 |
| 2022 | Ocak | 0,725 | 0,054 | 13,459 |
| 2022 | Şubat | 0,727 | 0,053 | 13,653 |
| 2022 | Mart | 0,731 | 0,050 | 14,500 |
| 2022 | Nisan | 1,084 | 0,073 | 14,898 |
| 2022 | Mayıs | 1,085 | 0,066 | 16,477 |
| 2022 | Haziran | 1,195 | 0,071 | 16,930 |
| 2022 | Temmuz | 1,196 | 0,067 | 17,930 |
| 2022 | Ağustos | 1,197 | 0,066 | 18,190 |
| 2022 | Eylül | 1,808 | 0,100 | 18,093 |
| 2022 | Ekim | 2,476 | 0,133 | 18,579 |
| 2022 | Kasım | 2,459 | 0,132 | 18,613 |
| 2022 | Aralık | 1,952 | 0,104 | 18,756 |
| 2023 | Ocak | 1,846 | 0,098 | 18,809 |
| 2023 | Şubat | 1,532 | 0,081 | 18,972 |
| 2023 | Mart | 1,14 | 0,059 | 19,216 |
| 2023 | Nisan | 0,92 | 0,047 | 19,451 |
| 2023 | Mayıs | 0,92 | 0,040 | 23,063 |
| 2023 | Haziran | 0,92 | 0,035 | 26,038 |
| 2023 | Temmuz | 0,92 | 0,034 | 27,068 |
| 2023 | Ağustos | 0,92 | 0,034 | 26,907 |
| 2023 | Eylül | 0,93 | 0,034 | 27,526 |
| 2023 | Ekim | 1,11 | 0,039 | 28,486 |

<https://www.baskentdogalgaz.com.tr/TR/Satis-Tarifeleri-ve-Fiyatlari/236>

*Altın, Alüminyum, Bakır, Bor, Çinko, Demir/Çelik, Gümüş, Krom, Kurşun ve Magnezyum üretimi ile Petrol Rafinerisi ve Petrokimya sektörlerinde faaliyet gösteren şirketler için belirlenen birim fiyat üzerinden faturalandırma yapılmıştır.

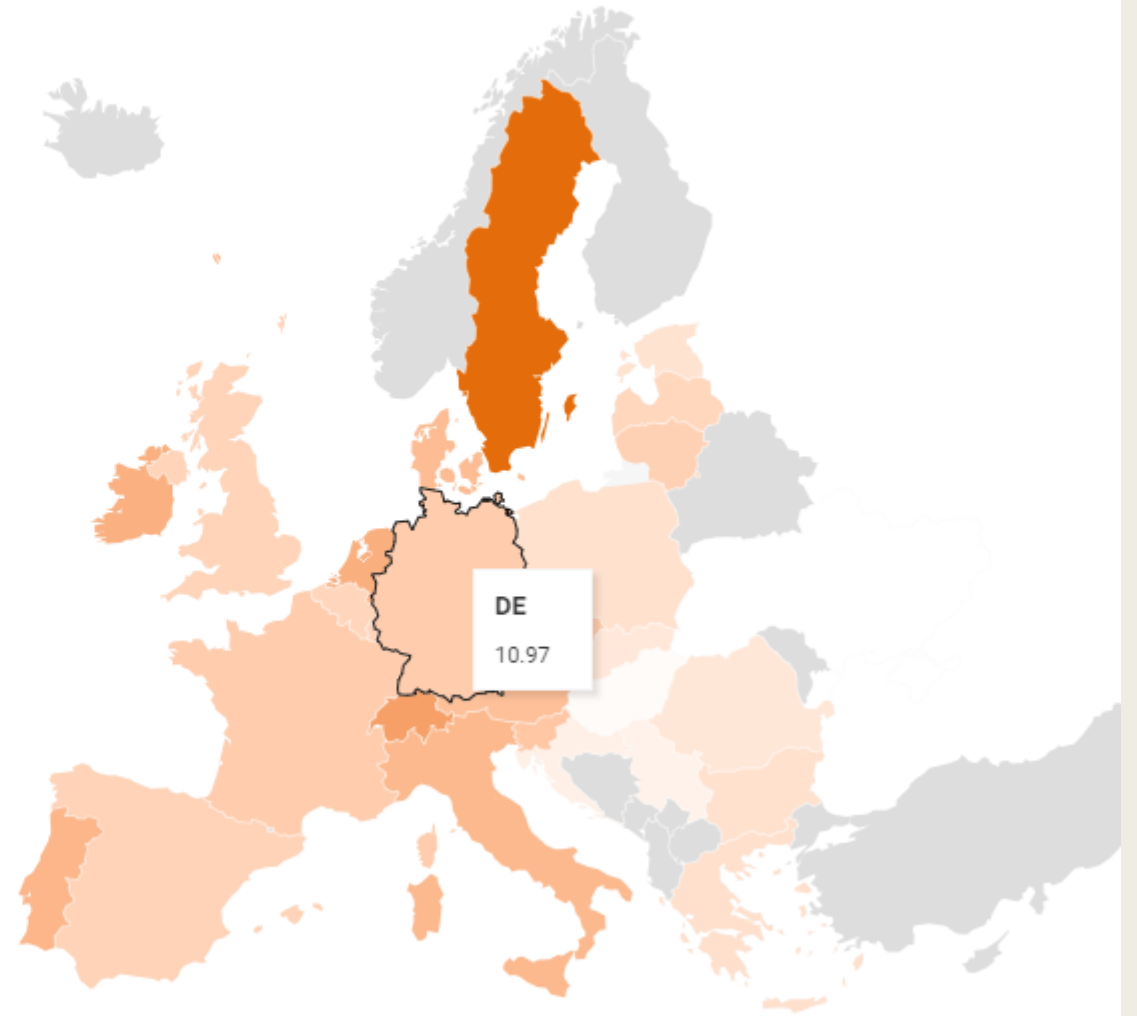
Electricity end-user prices (c€/kWh)

4.22 48.94



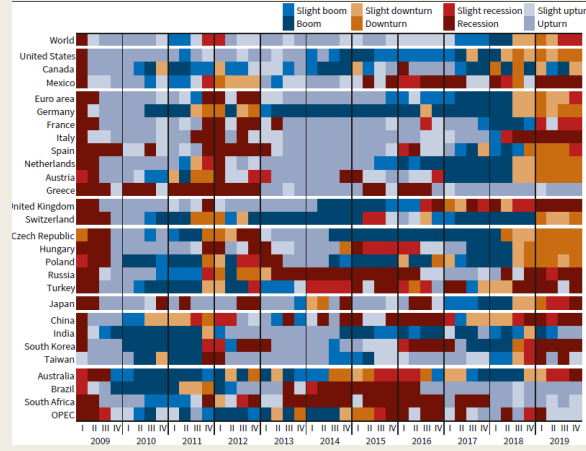
Natural gas end-user prices (c€/kWh)

1.97 28.43



Source: HEPI by Energie-Control Austria, MEKH and VaasaETT Ltd @VaasaETT 2023 • Created with [Datavrapper](#)

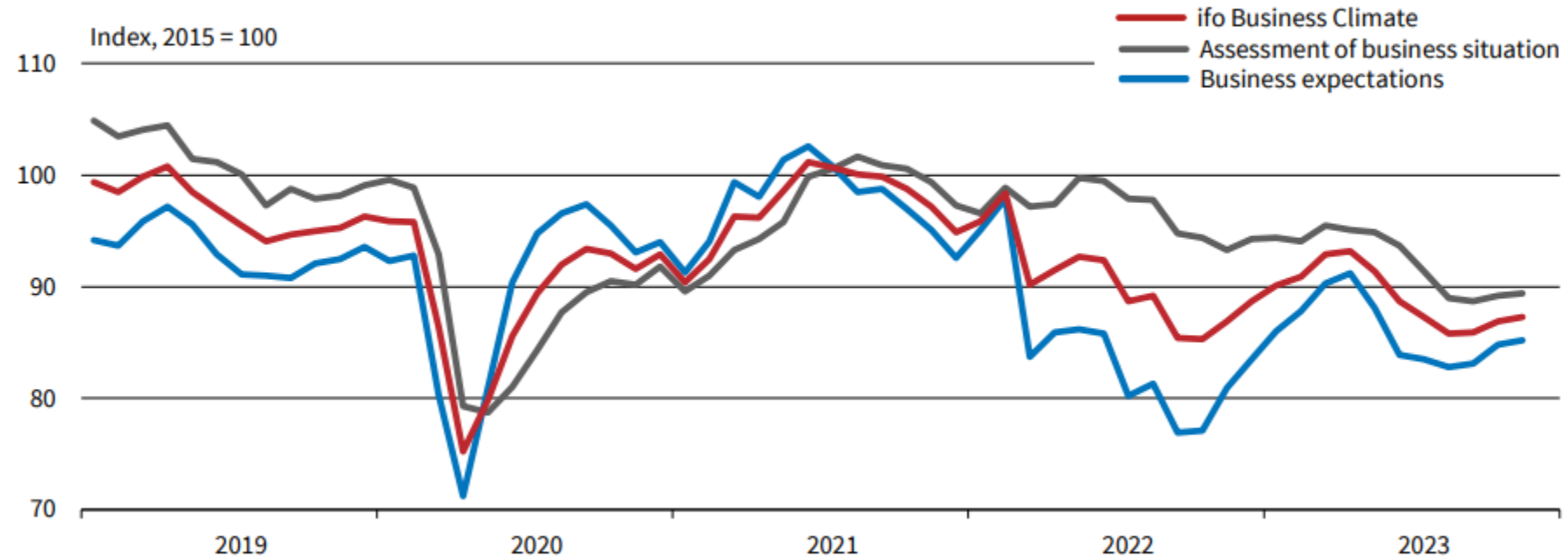
Source: HEPI by Energie Control Austria, MEKH and VaasaETT Ltd@VaasaETT 2023 • Created with [Datavrapper](#)



IFO EKONOMİ ÇALIŞMASI

ifo Almanya Ekonomisi Çalışması (Kasım 2023)

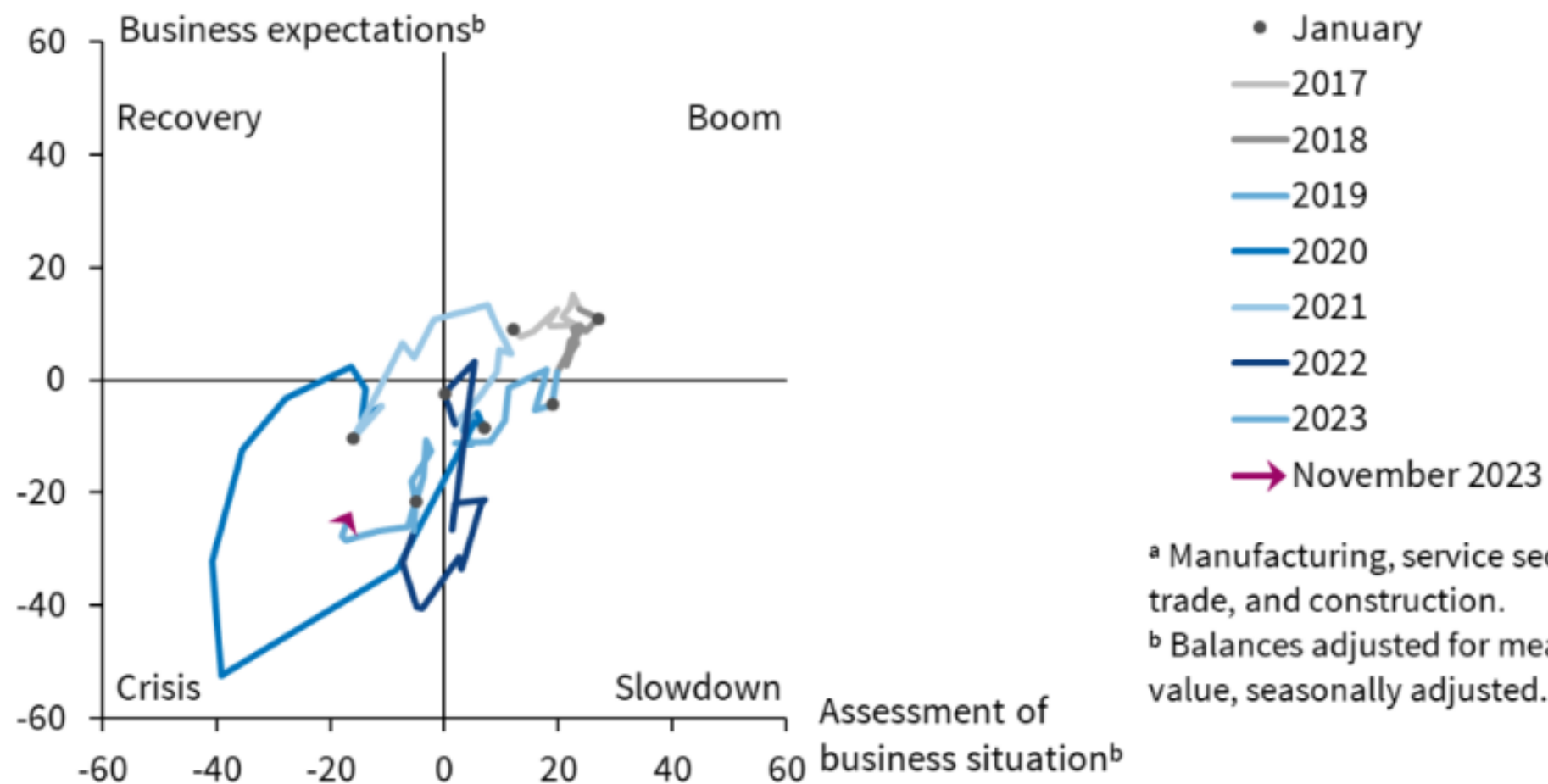
ifo Business Climate Germany^a
Seasonally adjusted



^a Manufacturing, service sector, trade, and construction.
Source: Ifo Business Survey, November 2023.

© Ifo Institute

ifo Business Cycle Clock Germany^a



Source: ifo Business Survey, November 2023.

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ifo Business Climate Germany and by Sector

(Balances, seasonally adjusted)

| | 11/22 | 12/22 | 01/23 | 02/23 | 03/23 | 04/23 | 05/23 | 06/23 | 07/23 | 08/23 | 09/23 | 10/23 | 11/23 |
|-----------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Germany | -10.1 | -6.0 | -3.0 | -1.4 | 3.0 | 3.6 | -0.2 | -6.2 | -9.1 | -12.4 | -12.3 | -10.0 | -9.3 |
| Manufacturing | -10.4 | -5.4 | -0.9 | 0.5 | 5.5 | 5.4 | -0.9 | -9.5 | -13.7 | -16.4 | -16.2 | -15.7 | -13.5 |
| Service Sector | -5.2 | -1.3 | 0.5 | 1.5 | 8.7 | 6.9 | 7.0 | 2.9 | 1.1 | -4.0 | -4.9 | -1.5 | -2.5 |
| Trade | -26.7 | -20.0 | -15.6 | -10.8 | -10.3 | -10.9 | -19.2 | -20.2 | -23.7 | -25.6 | -25.0 | -27.3 | -22.2 |
| Construction | -21.2 | -21.6 | -21.2 | -18.8 | -17.5 | -16.8 | -18.9 | -20.9 | -24.6 | -29.5 | -31.0 | -30.8 | -29.4 |

Source: ifo Business Survey.

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ACEA YENİ ARAÇ KAYITLARI

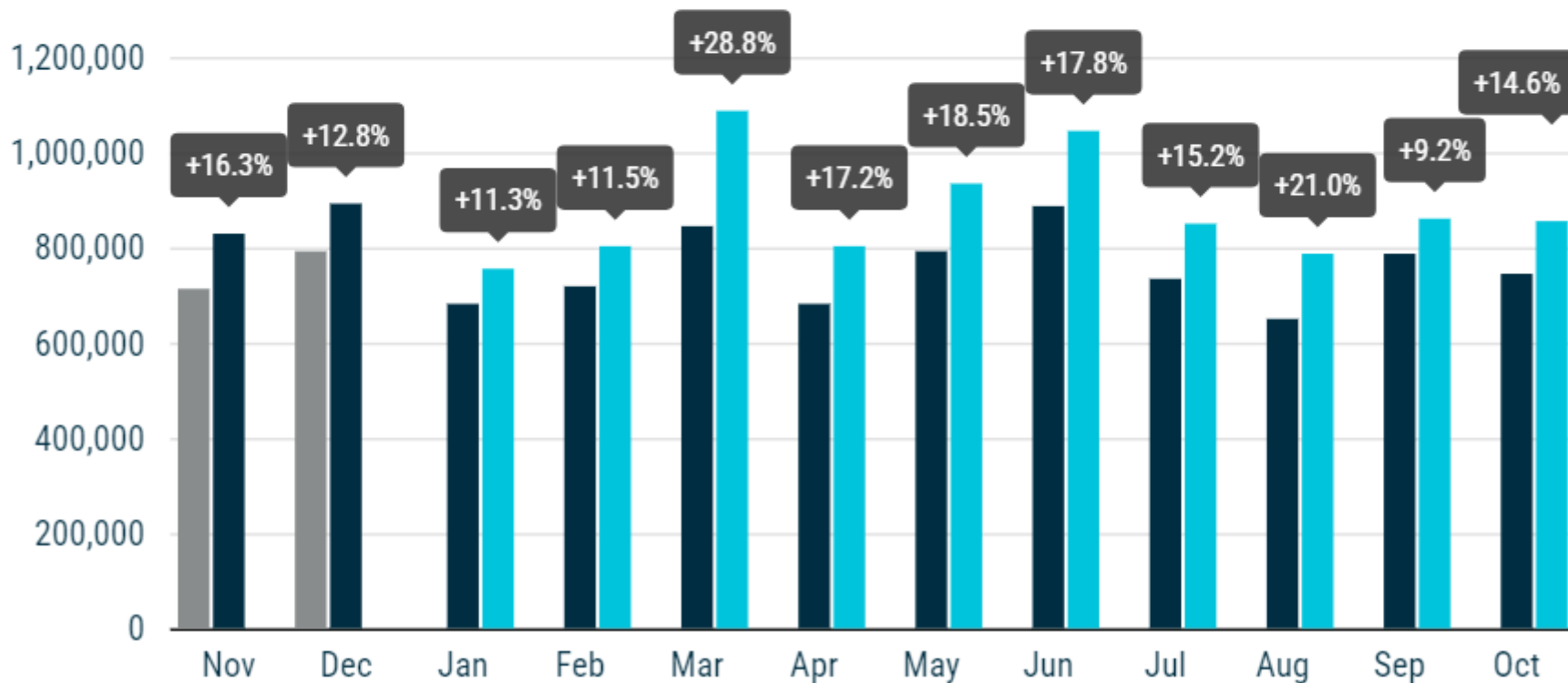
In October 2023, the EU car market expanded significantly, with new registrations surging by 14.6% to 855,484 units.

NEW EU CAR REGISTRATIONS

12-month trend

EUROPEAN UNION ▾

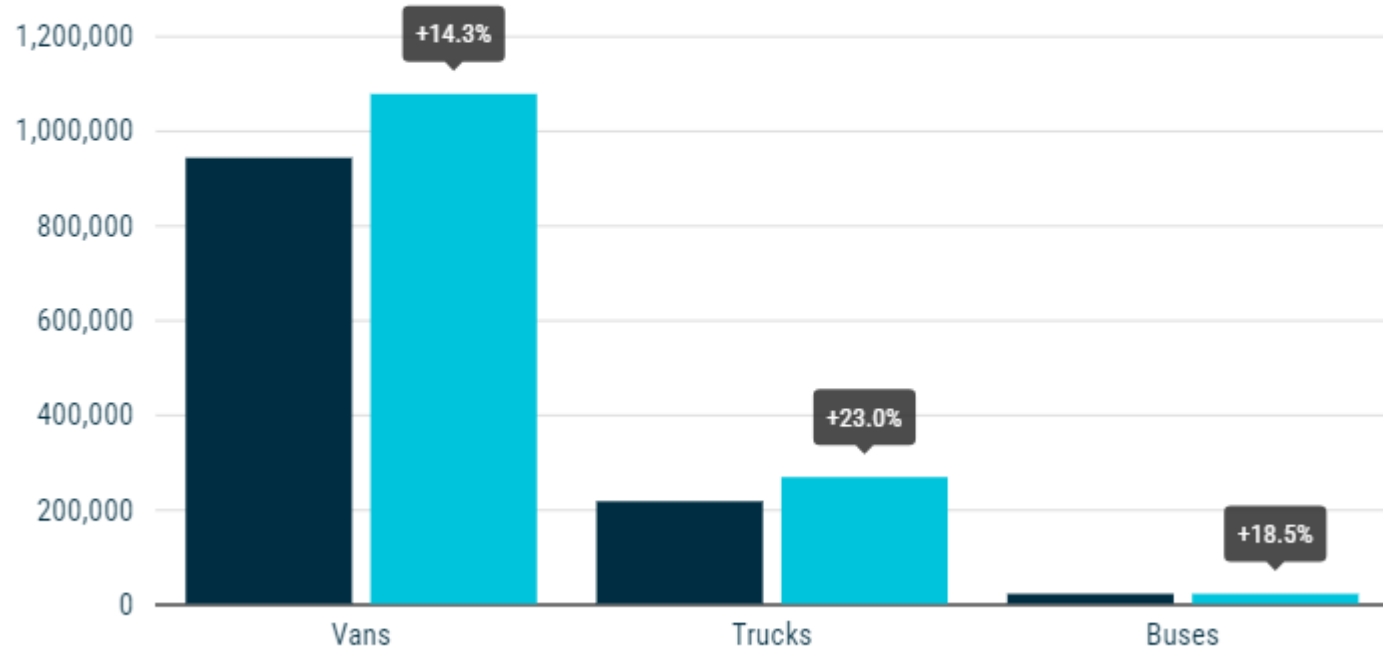
■ 2021 ■ 2022 ■ 2023



NEW EU COMMERCIAL VEHICLE REGISTRATIONS

EUROPEAN UNION ▼

■ Q1-Q3 2022 ■ Q1-Q3 2023



Created with LocalFocus

Source: ACEA

New commercial vehicles by power source

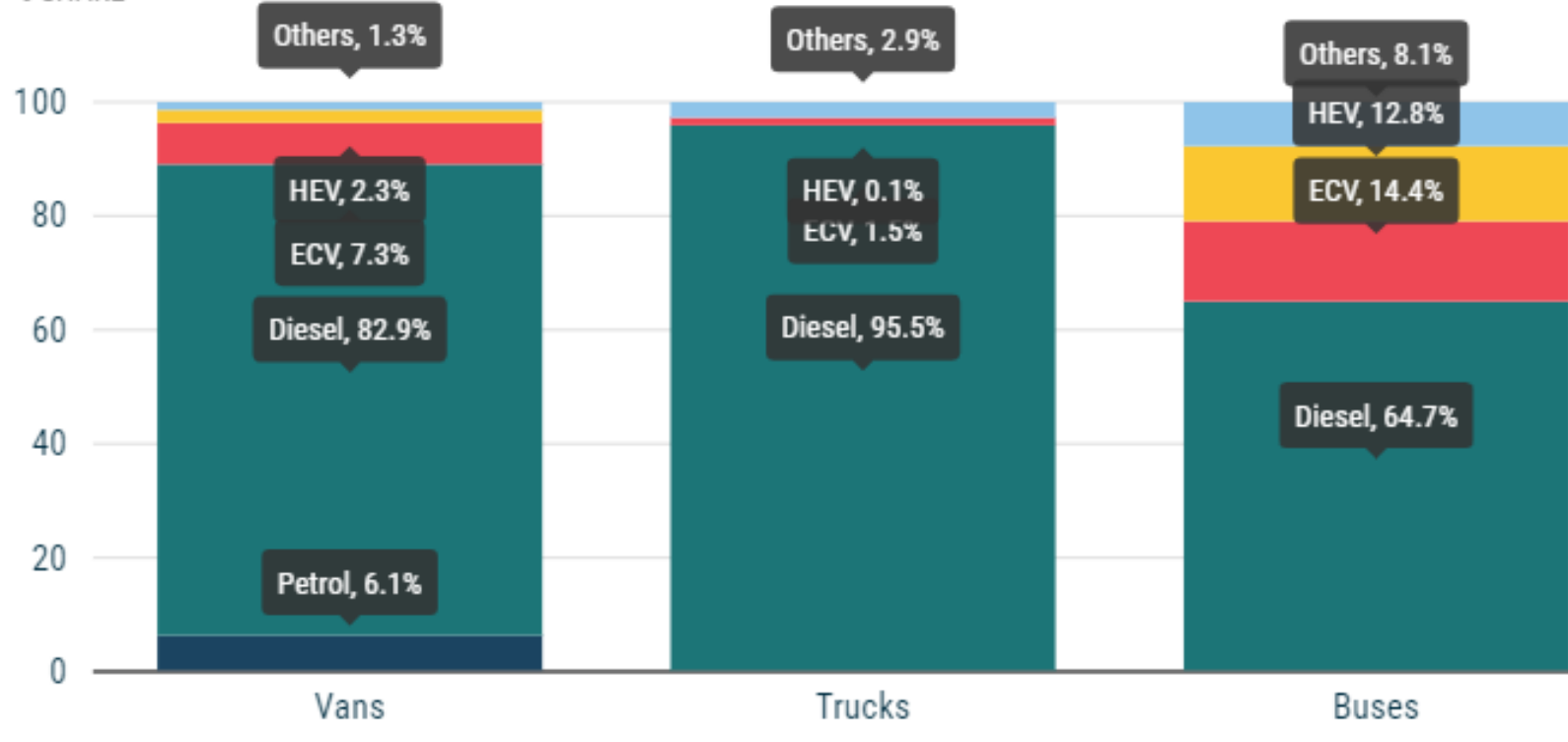
NEW COMMERCIAL VEHICLES BY POWER SOURCE

Q1-Q3 2023

EUROPEAN UNION

Petrol Diesel Electrically chargeable vehicle (ECV) Hybrid electric vehicle (HEV) Others

% SHARE



2022 Diesel

86,9%

96,3%

68,4%



OTOMOTİV SANAYİ DERNEĞİ
AUTOMOTIVE MANUFACTURERS ASSOCIATION

OTOMOTİV SANAYİ DERNEĞİ RAPORLARI

OTOMOTİV SANAYİ DERNEĞİ EYLÜL 2021 RAPORU



2023 EKİM Ayı Özeti 2023 October Summary

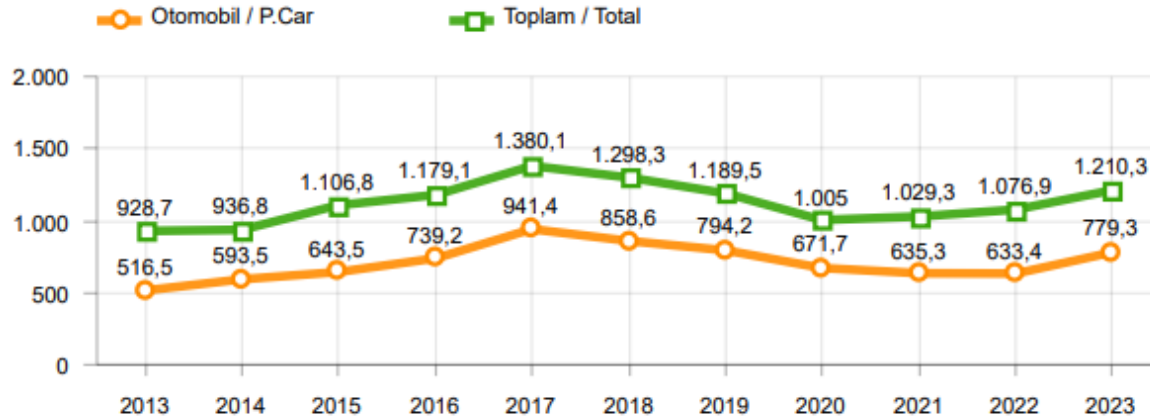
OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 10 / 2023
Automotive Industry Monthly Report 10 / 2023

| | 10 - 2022 | 10 - 2023 | % | 1 - 10 / 2022 | 1 - 10 / 2023 | % | 11/2021 - 10/2022 | 11/2022 - 10/2023 | % |
|---|------------------|------------------|------|----------------|----------------|------|-------------------|-------------------|------|
| Otomobil Üretimi/P.Cars Production | 62.363 | 91.511 | 46,7 | 633.369 | 779.328 | 23,0 | 780.913 | 956.848 | 22,5 |
| Toplam Üretim/Total Production | 114.835 | 136.177 | 18,6 | 1.076.865 | 1.210.342 | 12,4 | 1.323.726 | 1.486.125 | 12,3 |
| Otomobil Pazar/P.Cars Market | 47.440 | 82.611 | 74,1 | 446.664 | 749.501 | 67,8 | 533.205 | 895.497 | 68,0 |
| Toplam Pazar/Total Market | 69.072 | 105.145 | 52,2 | 618.702 | 999.858 | 61,6 | 749.422 | 1.208.319 | 61,2 |
| Otomobil İthalat/P.Cars Import | 29.697 | 52.482 | 76,7 | 275.012 | 504.510 | 83,5 | 325.326 | 591.153 | 81,7 |
| Toplam İthalat/Total Import | 37.798 | 65.119 | 72,3 | 341.884 | 633.018 | 85,2 | 409.062 | 745.293 | 82,2 |
| Otomobil İhracat/P.Cars Export | 50.771 | 66.456 | 30,9 | 447.373 | 540.304 | 20,8 | 557.079 | 664.149 | 19,2 |
| Toplam İhracat/Total Export | 91.352 | 98.126 | 7,4 | 779.316 | 832.080 | 6,8 | 957.648 | 1.022.888 | 6,8 |
| Otomobil İhracat(\$)/P.Cars Export (\$) | 737.314.396,68 | 992.896.753,47 | 34,7 | 7.140.703.708 | 8.904.537.906 | 24,7 | 8.873.120.415 | 10.833.380.134 | 22,1 |
| Toplam İhracat(\$)/Total Export (\$)* | 2.707.739.211,41 | 3.144.317.394,51 | 16,1 | 25.358.570.174 | 29.293.979.629 | 15,5 | 30.913.940.120 | 35.434.373.638 | 14,6 |

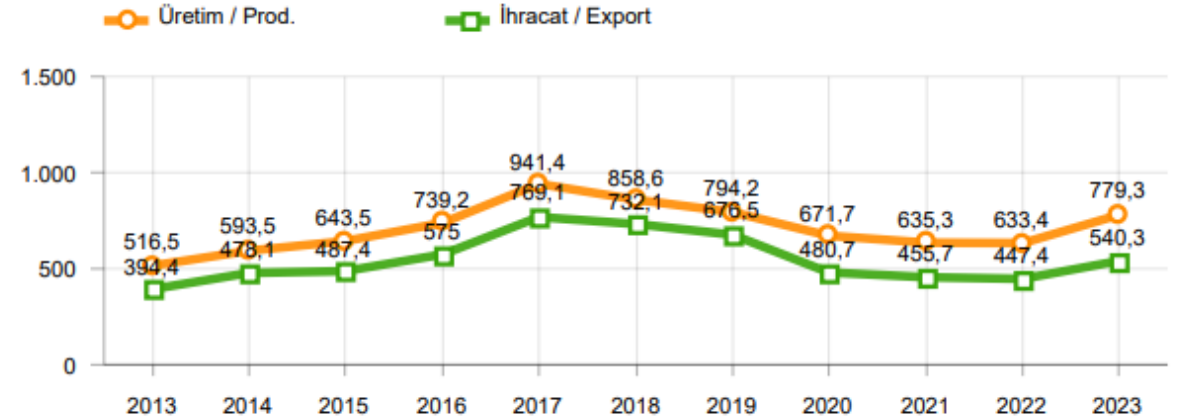
İlk 10 ayda toplam üretim geçen senenin aynı dönemine göre %12,4 artış gösterdi
Ekim 2023'de toplam üretim Ekim 2022'e göre %18,6 artış gösterdi

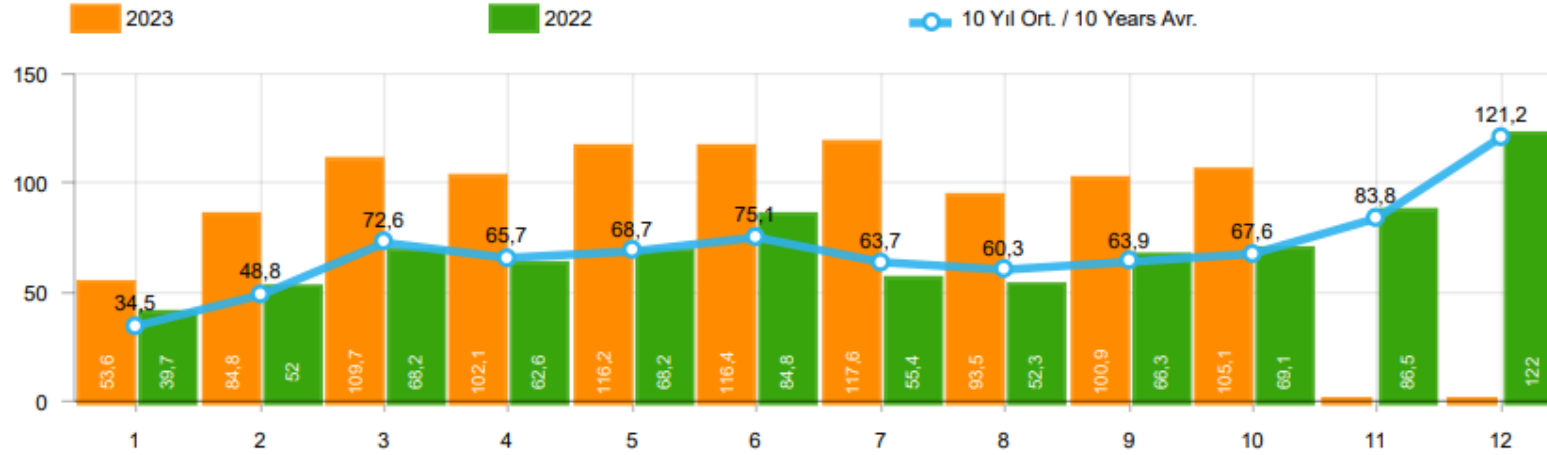
| Araç Tipleri / Types | 10 / 2022 | 10 / 2023 | 10 % Değişim | 1-10 / 2022 | 1-10 / 2023 | 1-10 % Değişim |
|--|----------------|----------------|--------------|------------------|------------------|----------------|
| OTOMOBİL / Pass.Car | 62.363 | 91.511 | 46,7 | 633.369 | 779.328 | 23,0 |
| OTOMOBİL Toplam / Pass.Car Total | 62.363 | 91.511 | 46,7 | 633.369 | 779.328 | 23,0 |
| B.KAMYON / H. Truck | 4.255 | 4.326 | 1,7 | 33.092 | 39.728 | 20,1 |
| K.KAMYON / L. Truck | 596 | 542 | -9,1 | 4.158 | 4.427 | 6,5 |
| KAMYONET / Pick Up | 43.256 | 35.151 | -18,7 | 357.786 | 329.636 | -7,9 |
| OTOBÜS / Bus | 784 | 1.107 | 41,2 | 6.248 | 8.652 | 38,5 |
| MINİBÜS / Minibus | 3.302 | 3.111 | -5,8 | 39.664 | 44.589 | 12,4 |
| MİDİBÜS / Midibus | 279 | 429 | 53,8 | 2.548 | 3.982 | 56,3 |
| TİCARİ ARAÇLAR Toplam / Commercial Vehicles Total | 52.472 | 44.666 | -14,9 | 443.496 | 431.014 | -2,8 |
| TASIT ARAÇLARI Toplam / Motor Vehicles Total | 114.835 | 136.177 | 18,6 | 1.076.865 | 1.210.342 | 12,4 |
| TRAKTÖR / F.Tractor | 4.810 | 4.944 | 2,8 | 39.718 | 48.409 | 21,9 |
| TRAKTOR Toplam / F.Tractor Total | 4.810 | 4.944 | 2,8 | 39.718 | 48.409 | 21,9 |
| GENEL TOPLAM / Grand Total | 119.645 | 141.121 | 17,9 | 1.116.583 | 1.258.751 | 12,7 |

Toplam Üretim ve Otomobil Üretimi (x1000)(OCAK - EKİM)
Total & P.Cars Production (x1000)(January - October)



Otomobil Üretimi ve İhracat (x1000)(OCAK - EKİM)
P.Cars Production & Exports (x1000)(January - October)





| Aylar / Months | 10 Yıl Ort / 10 Years Avr. | 2023 | % |
|----------------|----------------------------|---------|------|
| 1 | 34.512 | 53.578 | 55,2 |
| 2 | 48.807 | 84.781 | 73,7 |
| 3 | 72.622 | 109.658 | 51,0 |
| 4 | 65.666 | 102.076 | 55,4 |
| 5 | 68.722 | 116.227 | 69,1 |
| 6 | 75.146 | 116.352 | 54,8 |
| 7 | 63.695 | 117.647 | 84,7 |
| 8 | 60.309 | 93.483 | 55,0 |
| 9 | 63.920 | 100.911 | 57,9 |
| 10 | 67.649 | 105.145 | 55,4 |
| TOPLAM/TOTAL | 621.051 | 999.858 | 61,0 |

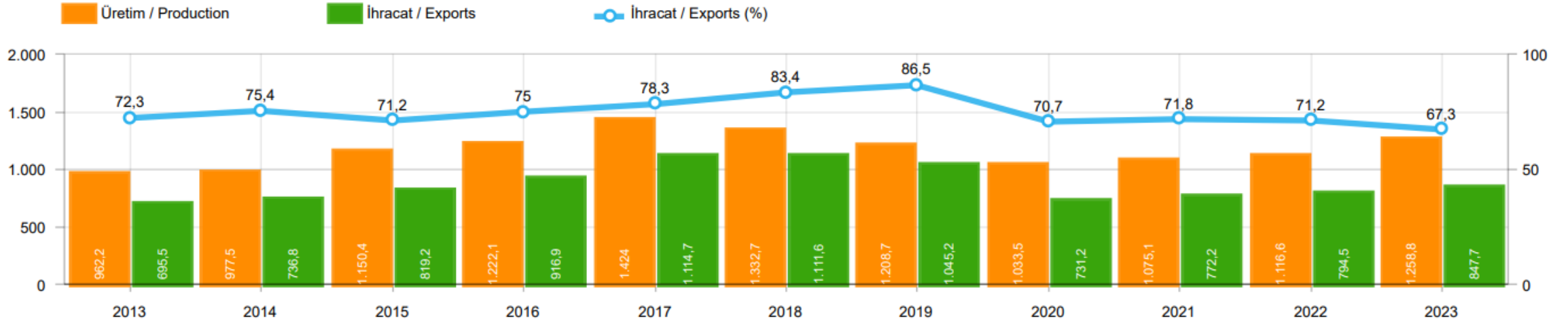
| Yıl / Year | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 1-10 Toplam / Total | Toplam / Total | 1-10 Yerli / Local | 1-10 İthal / Import | İthal Oran / Import % |
|------------|--------|--------|---------|---------|---------|---------|---------|--------|---------|---------|---------|---------|---------------------|----------------|--------------------|---------------------|-----------------------|
| 2013 | 37.563 | 51.133 | 72.943 | 77.265 | 85.835 | 78.043 | 75.152 | 67.662 | 71.388 | 60.690 | 83.470 | 136.048 | 677.674 | 897.192 | 211.066 | 466.608 | 68,9 |
| 2014 | 34.751 | 37.659 | 51.312 | 57.113 | 62.447 | 64.295 | 62.770 | 63.303 | 70.764 | 69.742 | 84.368 | 154.843 | 574.156 | 813.367 | 197.036 | 377.120 | 65,7 |
| 2015 | 37.256 | 59.221 | 89.765 | 96.182 | 85.804 | 91.071 | 87.358 | 85.244 | 67.181 | 67.086 | 88.431 | 164.464 | 766.168 | 1.019.063 | 264.108 | 502.060 | 65,5 |
| 2016 | 34.369 | 54.840 | 85.932 | 87.748 | 97.090 | 94.666 | 59.732 | 73.654 | 69.413 | 85.666 | 125.462 | 145.706 | 743.110 | 1.014.278 | 238.135 | 504.975 | 68,0 |
| 2017 | 36.640 | 48.585 | 76.178 | 78.231 | 88.066 | 85.820 | 84.727 | 74.818 | 74.046 | 94.439 | 103.772 | 141.507 | 741.550 | 986.829 | 268.817 | 472.733 | 63,7 |
| 2018 | 36.525 | 48.768 | 79.600 | 73.886 | 74.996 | 52.788 | 54.194 | 35.137 | 23.915 | 22.321 | 59.406 | 80.014 | 502.130 | 641.550 | 191.259 | 310.871 | 61,9 |
| 2019 | 14.847 | 25.569 | 50.651 | 31.944 | 33.947 | 43.899 | 18.442 | 26.832 | 43.068 | 50.288 | 59.575 | 92.885 | 339.487 | 491.947 | 147.998 | 191.489 | 56,4 |
| 2020 | 28.123 | 48.948 | 51.554 | 27.165 | 33.308 | 72.789 | 89.419 | 63.570 | 93.406 | 97.125 | 82.824 | 107.919 | 605.407 | 796.150 | 276.253 | 329.154 | 54,4 |
| 2021 | 45.308 | 61.325 | 100.046 | 64.551 | 57.510 | 83.304 | 49.732 | 60.573 | 59.717 | 60.064 | 64.087 | 66.633 | 642.130 | 772.850 | 283.575 | 358.555 | 55,8 |
| 2022 | 39.741 | 52.030 | 68.241 | 62.584 | 68.221 | 84.788 | 55.424 | 52.297 | 66.304 | 69.072 | 86.499 | 121.962 | 618.702 | 827.163 | 276.818 | 341.884 | 55,3 |
| 2023 | 53.578 | 84.781 | 109.658 | 102.076 | 116.227 | 116.352 | 117.647 | 93.483 | 100.911 | 105.145 | | | 999.858 | 999.858 | 366.840 | 633.018 | 63,3 |



OTOMOTİV SANAYİ DERNEĞİ
AUTOMOTIVE MANUFACTURERS ASSOCIATION

İhracat / Üretim(x1000) (2013 - 2023 / 1 - 10)(Traktör Dahil) Exports / Production(x1000) (2013 - 2023 / 1 - 10)(Including Tractors)

OTOMOTİV SEKTÖRÜ AYLIK DEĞERLENDİRME RAPORU 10 / 2023
Automotive Industry Monthly Report 10 / 2023



| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---------------------|---------|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| İhracat/Export | 695.511 | 736.829 | 819.187 | 916.873 | 1.114.658 | 1.111.645 | 1.045.201 | 731.168 | 772.220 | 794.488 | 847.728 |
| Üretim/Production | 962.173 | 977.511 | 1.150.359 | 1.222.078 | 1.424.042 | 1.332.726 | 1.208.668 | 1.033.487 | 1.075.099 | 1.116.583 | 1.258.751 |
| İhracat/Exports (%) | 72,3 | 75,4 | 71,2 | 75 | 78,3 | 83,4 | 86,5 | 70,7 | 71,8 | 71,2 | 67,3 |

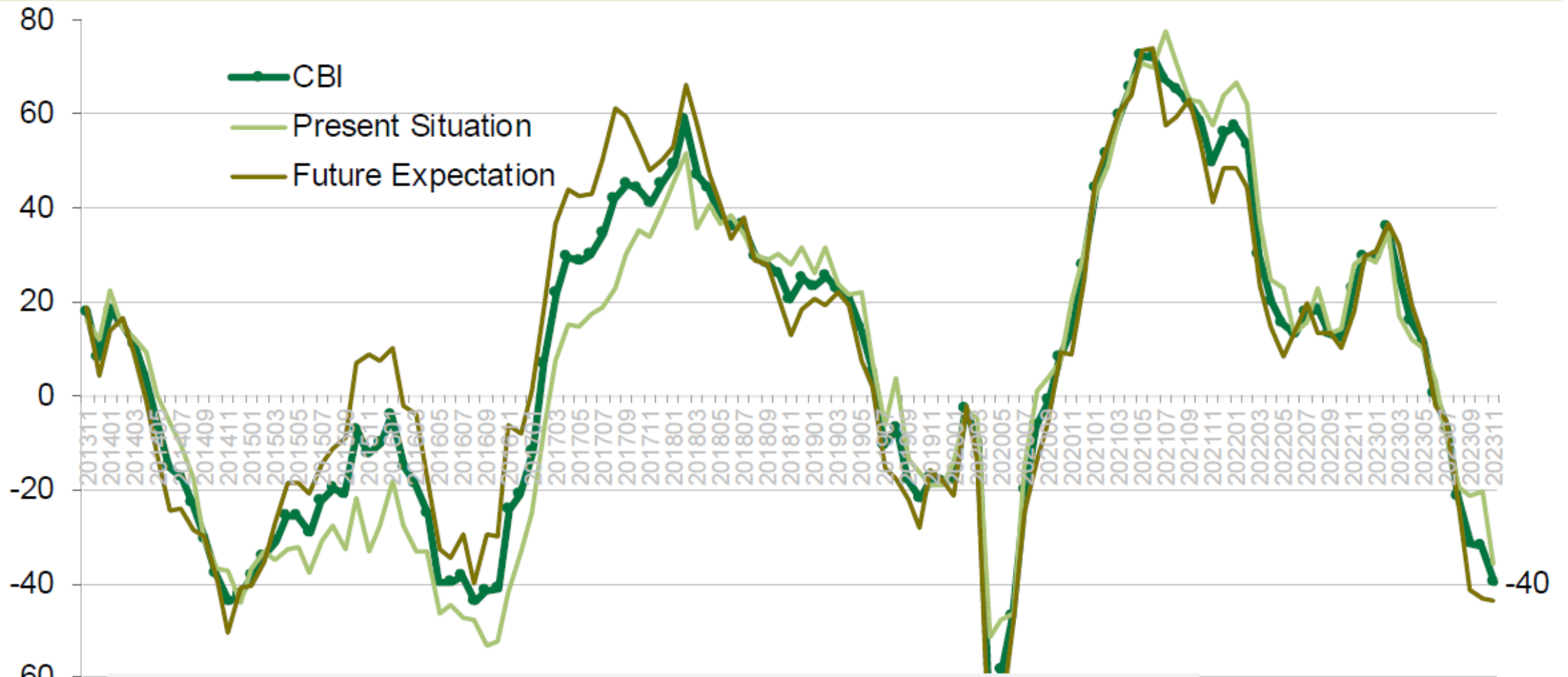


CEMA

European Agricultural
Machinery Association

CEMA AVRUPA TARIM MAKİNELERİ BİRLİĞİ RAPORLARI

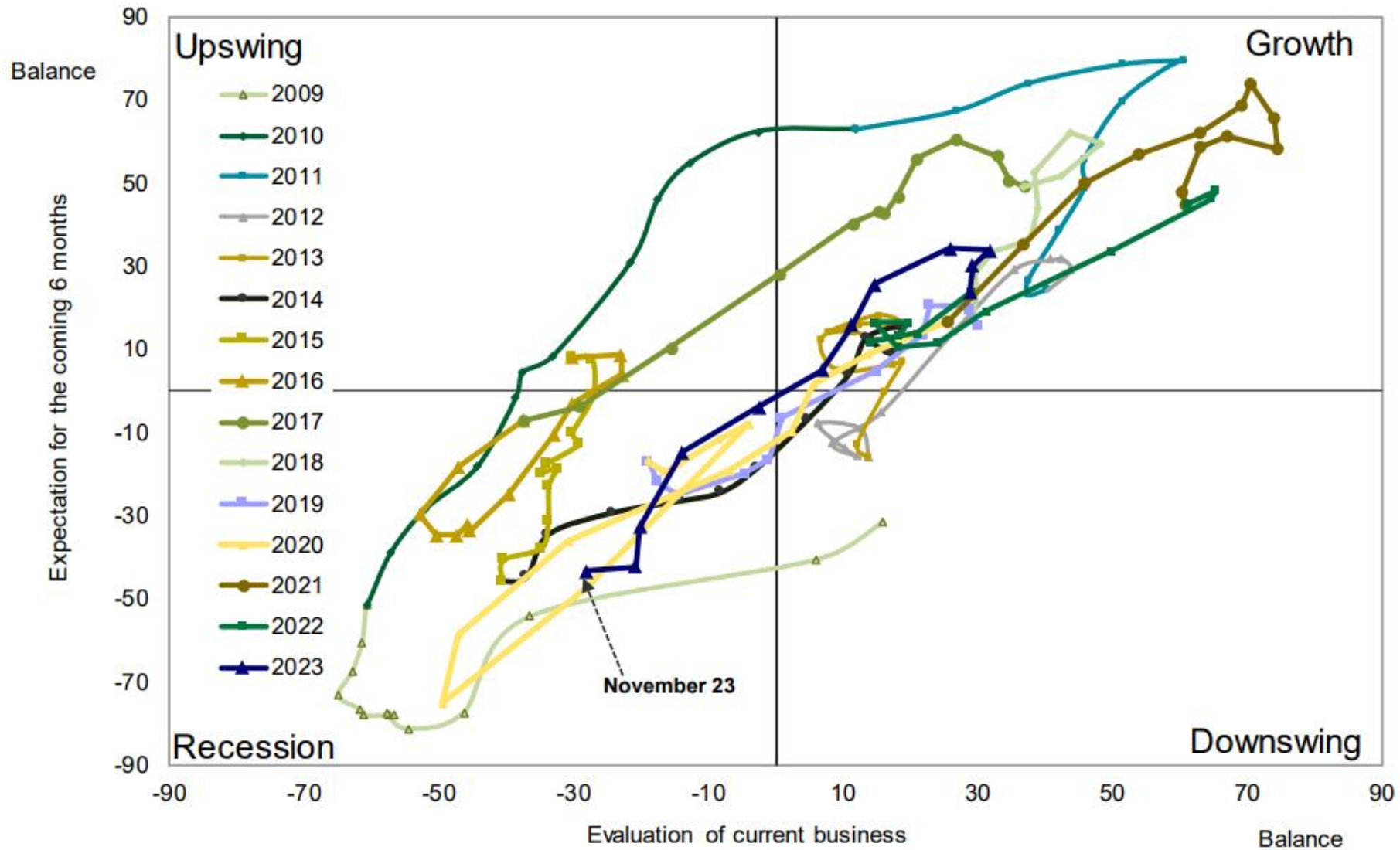
CEMA Business Climate Index (CBI) -Total



CBI = geometric mean of 1) evaluation of the current business situation and 2) turnover expectation;
Index scale from -100 to +100;
positive index for 1) = majority of respondents evaluates the current situation as favourable and vice versa;
positive index for 2) = majority of respondents expects for the next six months an increasing turnover and vice versa (respectively compared to the previous year's level)

Business Climate

Illustration of Business Cycle

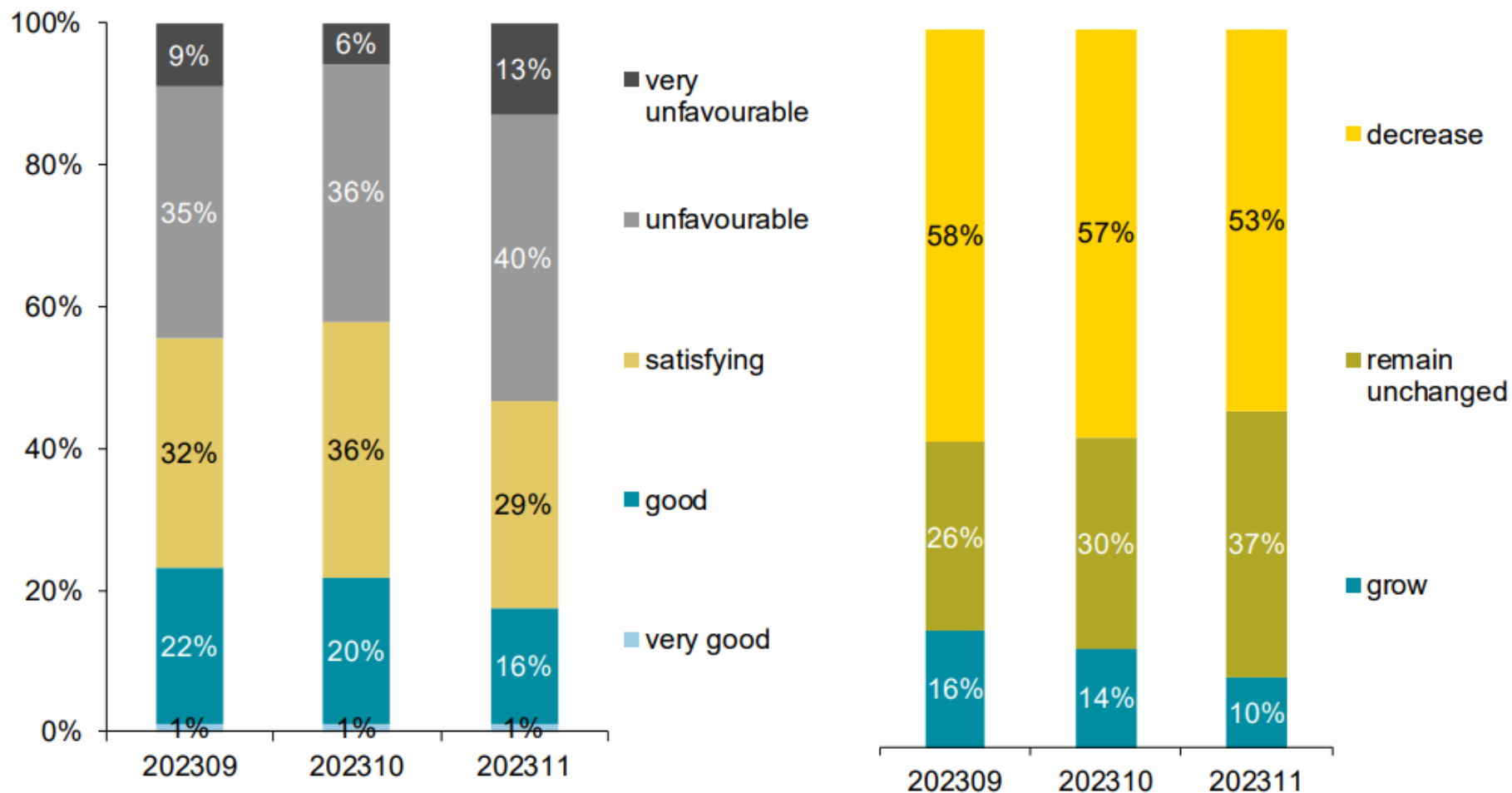


Business Climate

Current Evaluation and Expectations

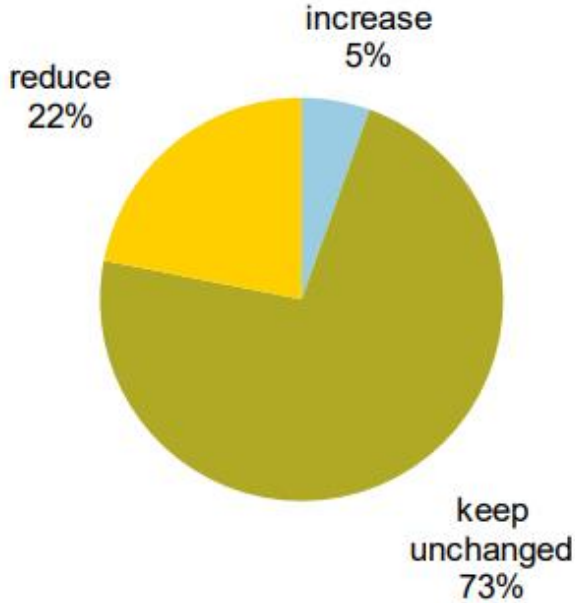
Question: We consider our current business to be
....

Question: We expect our overall turnover within the
next 6 months to....



Question: Our plans regarding the workforce

Regular employees



Temporary employees

