






















**GERMAN-TURKISH MACHINERY
SECTOR COOPERATION FORUM**
5 December 2019



WE ARE WELL ORGANIZED, PARTICIPATOR CONTRIBUTOR AND SELF-DISCIPLINED SECTOR



	AIMSAD Woodworking Machinery and Side Industries Association		EMOSAD Electric Engines Industrialists' Association		PAGDER Turkish Plastics Industrialists' Association
	AKDER Fluid Power Association		ENOSAD Industrial Automation Manufacturers' Association		POMSAD Turkish Pump and Valve Manufacturers' Association
	AMD Packaging Machinery Association		İMDER Turkish Construction Equipment Distributors' and Manufacturers' Association		SAHA Defense, Aerospace and Space Cluster
	ARÜSDER Vehicle and On-Vehicle Equipment and Work Machines Association		İSDER Turkish Materials Handling, Storage & Industrial Equipments Association		TARMAKBİR Turkish Agricultural Machinery and Equipment Manufacturers' Association
	AYSAD Elevator and Escalator Industrialists' Association		İSKİD Air Conditioning and Refrigeration Manufacturers' Association		TEMSAD Turkish Textile Machinery Industrialists' Association
	BESİAD Fasteners Industrialists' and Businessmen's Association		KBSB Vessel and Pressure Vessel Industrialists' Association		TEVİD Electric Crane Manufacturers' Association
	EFSİAD Industrial Heating Equipment Manufacturers and Businessmen Association		MİB Machinery Manufacturers' Association		ROBODER Robotics and High Technology Production System Entegrating Association
					OBSERVER

KEY FACTS TURKISH MACHINERY INDUSTRY

At Rank **6** in Europe



Turkey is Europe's
6th largest market
manufacturer

Industry 4.0 – Intelligent
Networking of production, product
development, logistics and
customers

Adaptation to developments
requires flexibility,
straightforwardness, capacity for
learning, qualification and
cooperativeness.

We, as Turkish machine-builders,
are eager to face the challenges.

Trade Volume
\$21
Billion



The trade volume
between USA
and Turkey is
21 billion USD.



13.000

Turkish Machinery represents
more than 13.000
exporting mechanical
engineering companies.

60%



About 60% of Turkey's
machinery export is
realized to the EU and
the USA.

200
Countries

The Turkish mechanical
engineering industry provides
its products to more than
200 countries worldwide.



The 5 most important product groups of
Turkish mechanical engineering are:

- Motors and components
- Air conditioners and cooling aggregates
- Washing and drying machines
- Construction and mining machines
- Pumps and compressors

MANUFACTURERS AND EXPORTERS IN TURKEY



NACE 28
~17.000

Euromonitor
~35.000

**Member Of
MAiB**
~14.000

**Member Of
MAKFED**
~2.500

HS
84-85-87-90
~30.000

**Exporters
Of HS 84**
~33.000

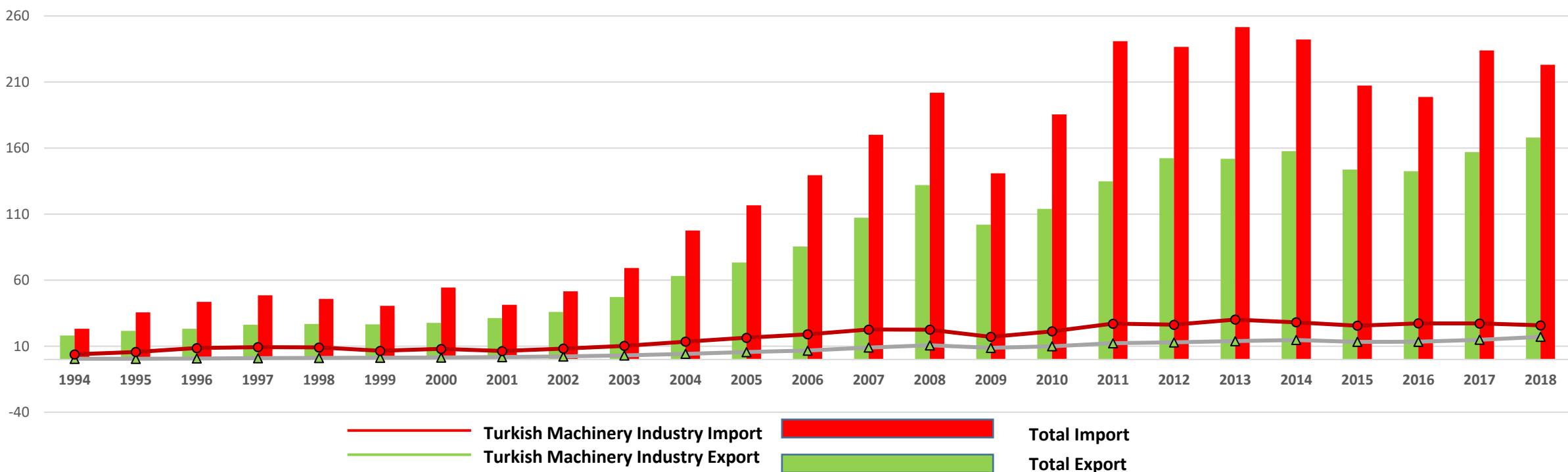
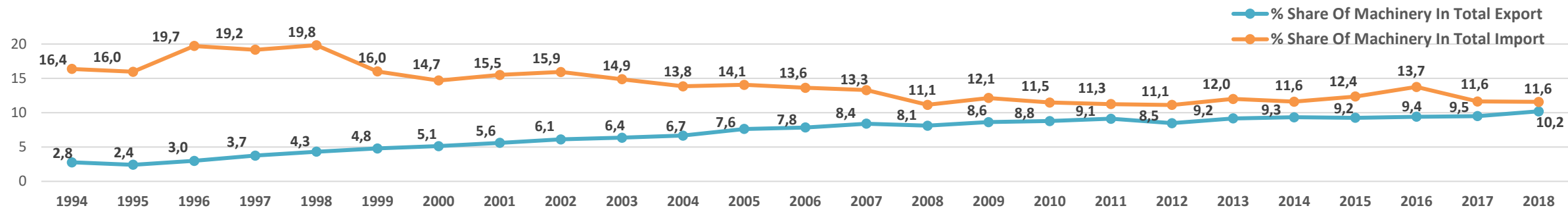
THE SCALE OF TURKISH MACHINERY INDUSTRY

Total number of companies: 17.050
% 4,3 share in Turkish manufacturing
industry

Number of Employees	Share of Companies (%)		Share of Employment (%)	
	2010	2017	2010	2017
1-9	77,2	76,3	18,5	15,1
10-49	19,4	19,2	35,1	28,8
50-249	3,0	3,9	25,6	27,2
250+	0,4	0,6	20,9	29,0

Flexible structure of SMEs is one of the strengths of Turkish machinery industry.

MACHINERY AND TOTAL IMPORT AND EXPORT OF TURKEY (BILLION \$)



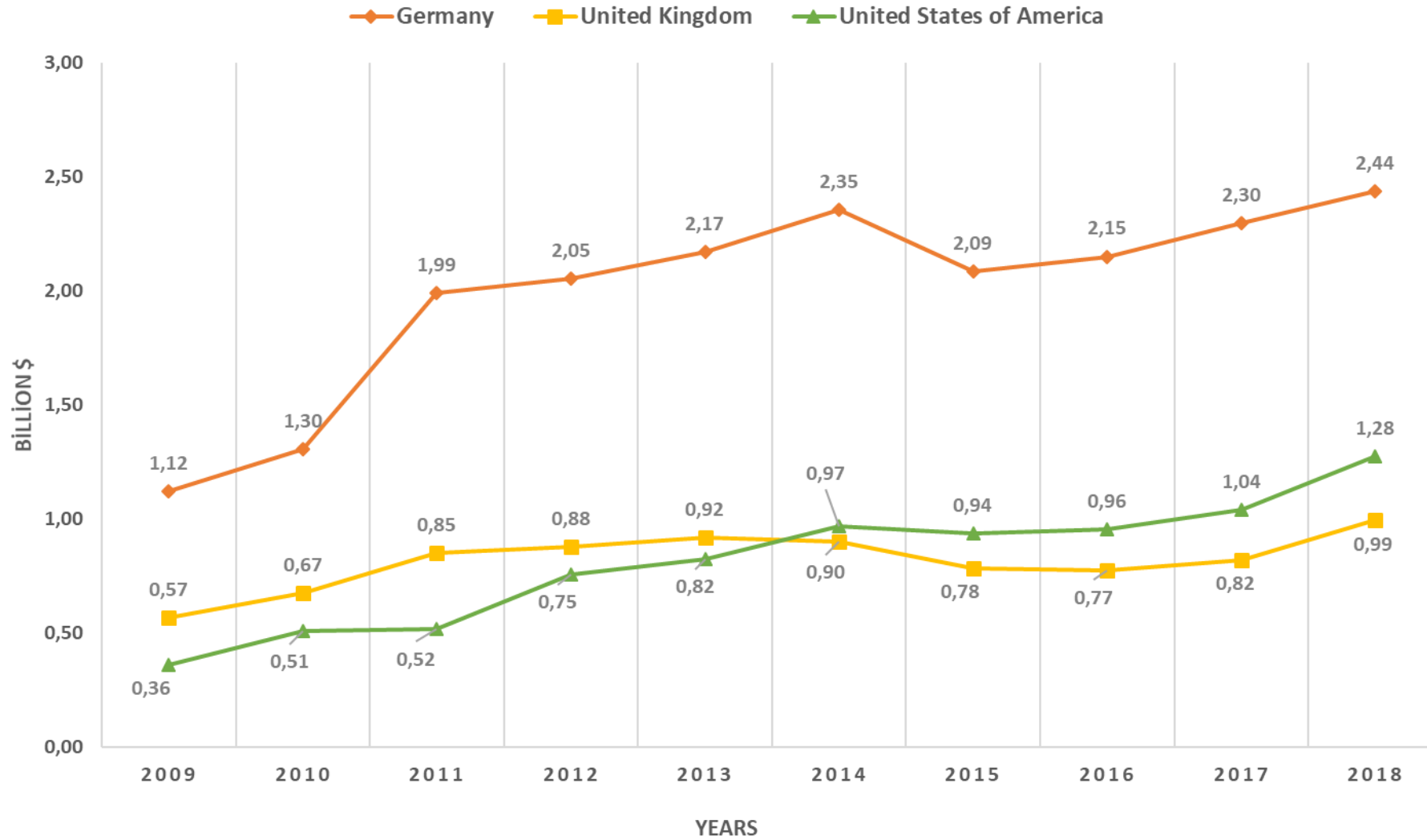
SHARE OF COMPANIES IN MACHINERY EXPORT



	SMALL AND MEDIUM SIZED ENTERPRISES (SMEs)				250+ Employees
	1-9 Employees	10-49 Employees	50-249 Employees	Share of the SMEs in Machinery Export %	
2010	17,0	23,7	19,6	60,3	39,7
2011	15,9	25,9	18,8	60,6	39,4
2012	18,2	23,2	19,7	61,1	38,9
2013	19,0	23,0	17,9	59,9	40,1
2014	19,2	21,1	17,9	58,2	41,8
2015	19,1	22,4	19,7	61,2	38,8
2016	19,0	22,5	19,9	61,4	38,6
2017	18,6	22,0	20,6	60,9	39,1
2018	17,9	21,1	20,3	59,3	40,7

SMEs play a particularly important role in the Turkish machinery export

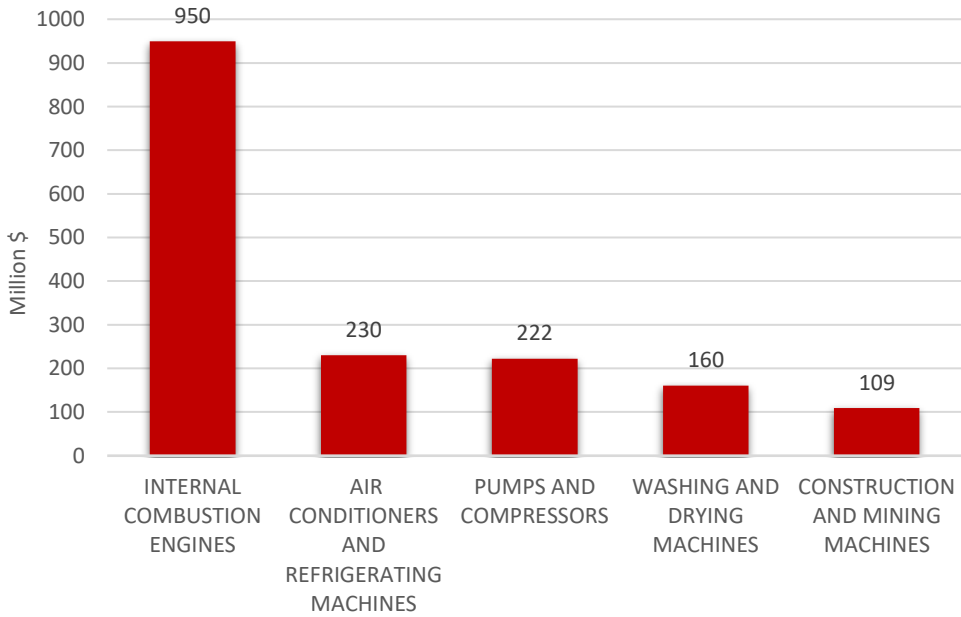
TOP 3 COUNTRIES IN TURKISH MACHINERY EXPORT



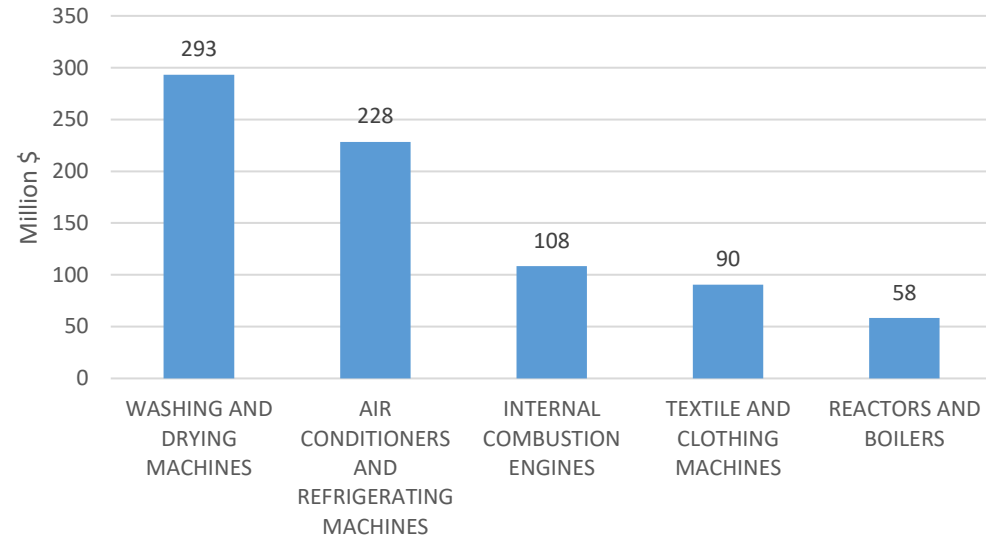
TOP 5 PRODUCT GROUPS EXPORTED TO THE TOP 3 COUNTRIES



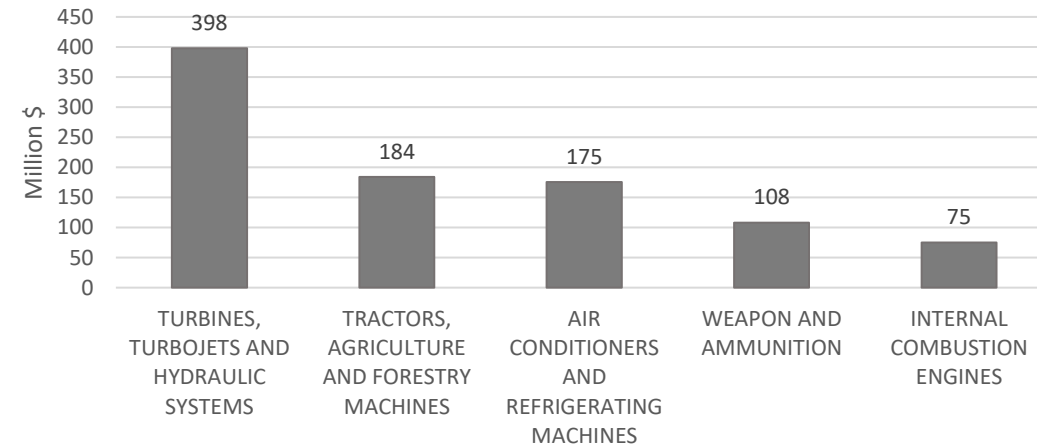
MACHINERY EXPORT TO GERMANY



MACHINERY EXPORT TO UNITED KINGDOM



MACHINERY EXPORT TO UNITED OF STATES



TARGET MARKETS OF TURKISH MACHINERY SECTOR

1. GERMANY: 2,4 Billion \$

8,6 kg/\$



Internal combustion engines: 947 million \$

Cooling machines and air conditioners: 230 million \$

Pumps and compressors: 218 million \$

Share of machinery export in Turkey's total export to Germany is **15,4%**.

2. USA: 1,3 Billion \$

14,2 kg/\$



Turbines, turbojets, hydraulic systems: 398 million \$

Tractors, agricultural machines: 184 million \$

Cooling machines and air conditioners: 175 million \$

Share of machinery export in Turkey's total export to USA is **15,5%**.

TARGET MARKET OF TURKISH MACHINERY SECTOR (2018)

3. CHINA: 200 Million \$

8,1 kg/\$



Reactors and boilers: 50 million \$

Cooling machines and air conditioners: 25 million \$

Internal combustion engines: 17 million \$

Share of machinery export in Turkey's total export to China is 6,8%.

4. INDIA: 273 Million \$

6,7 kg/\$



Turbines, turbojets, hydraulic systems: 72 million \$

Internal combustion engines: 39 million \$

Textile machines: 25 million \$

Share of machinery export in Turkey's total export to India is 23,1%.

5. RUSSIA: 412 Million \$

6,8 kg/\$



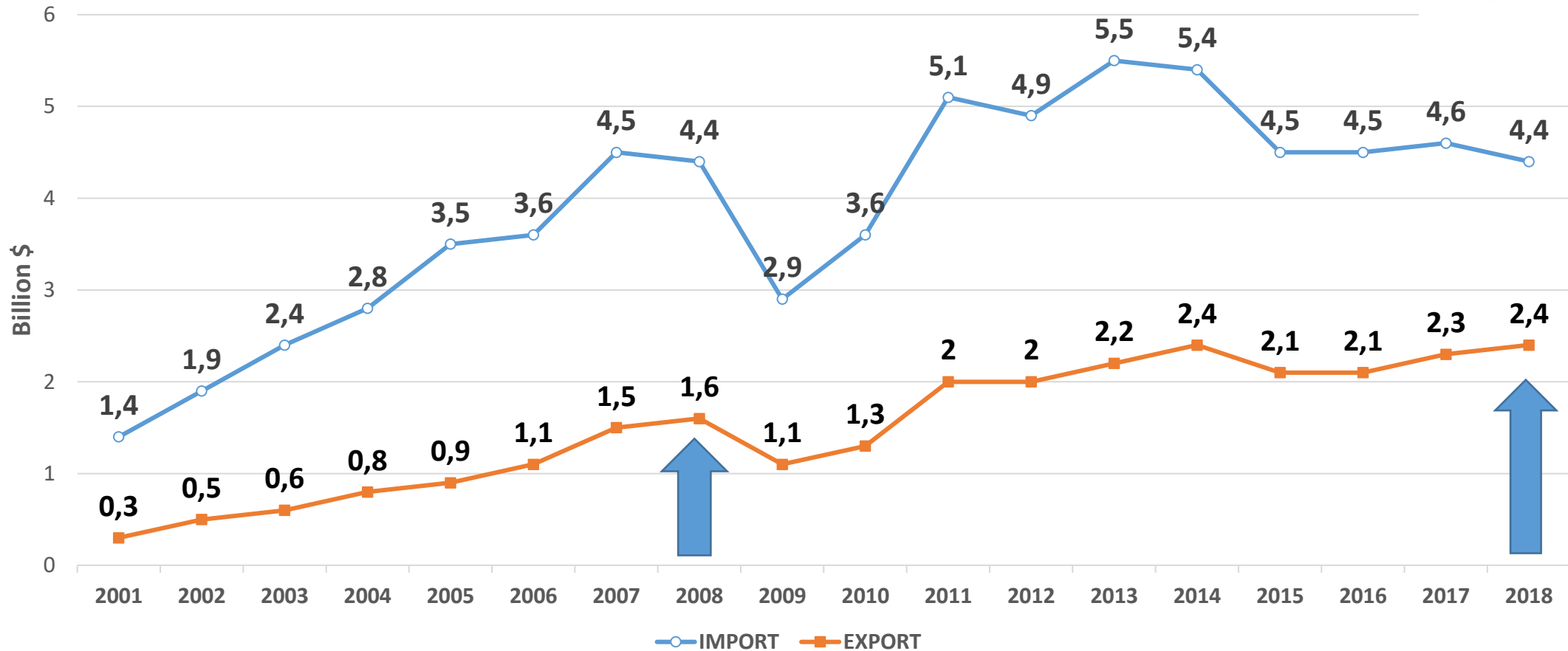
Machine tools: 48 million \$

Construction machines: 27 million \$

Pumps and compressors: 32 million \$

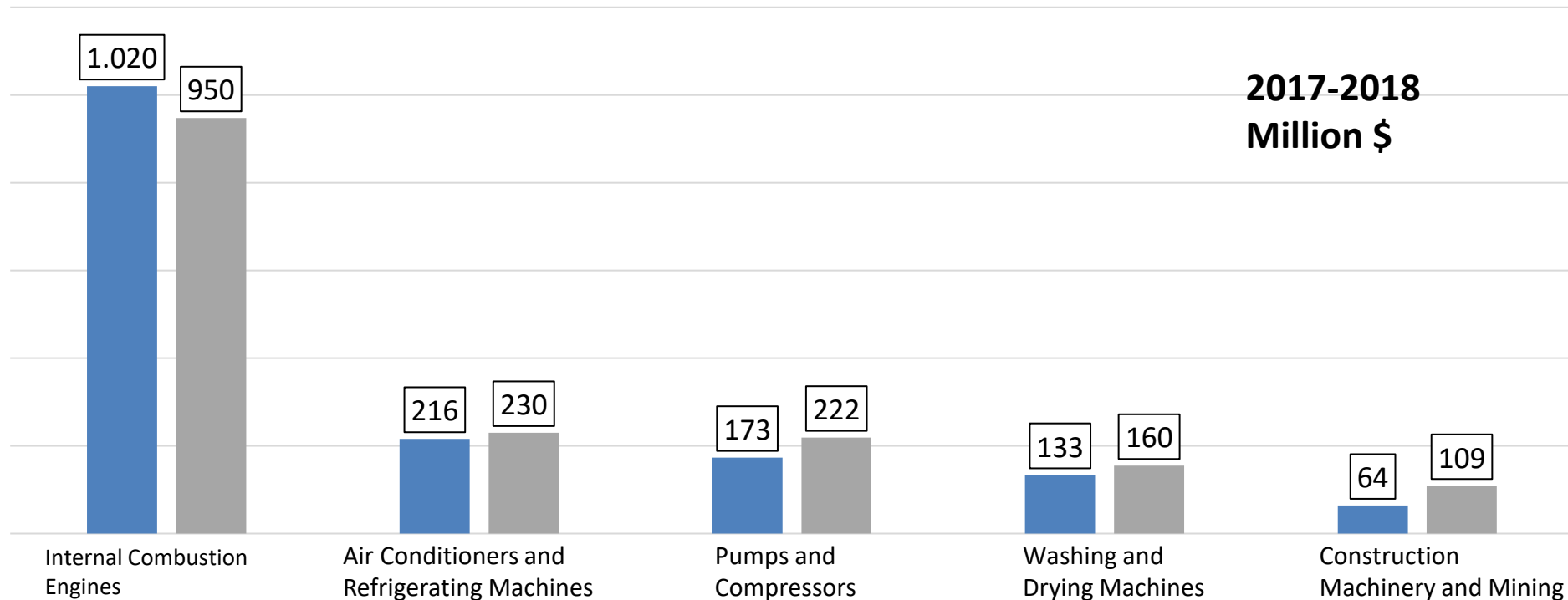
Share of machinery export in Turkey's total export to Russia is 12%.

MACHINERY FOREIGN TRADE BETWEEN TURKEY AND GERMANY (HS CODE:84)



Volume of machinery trade had a 16% share in total trade between two countries in 2018 and increased 4 fold between 2001 and 2018.

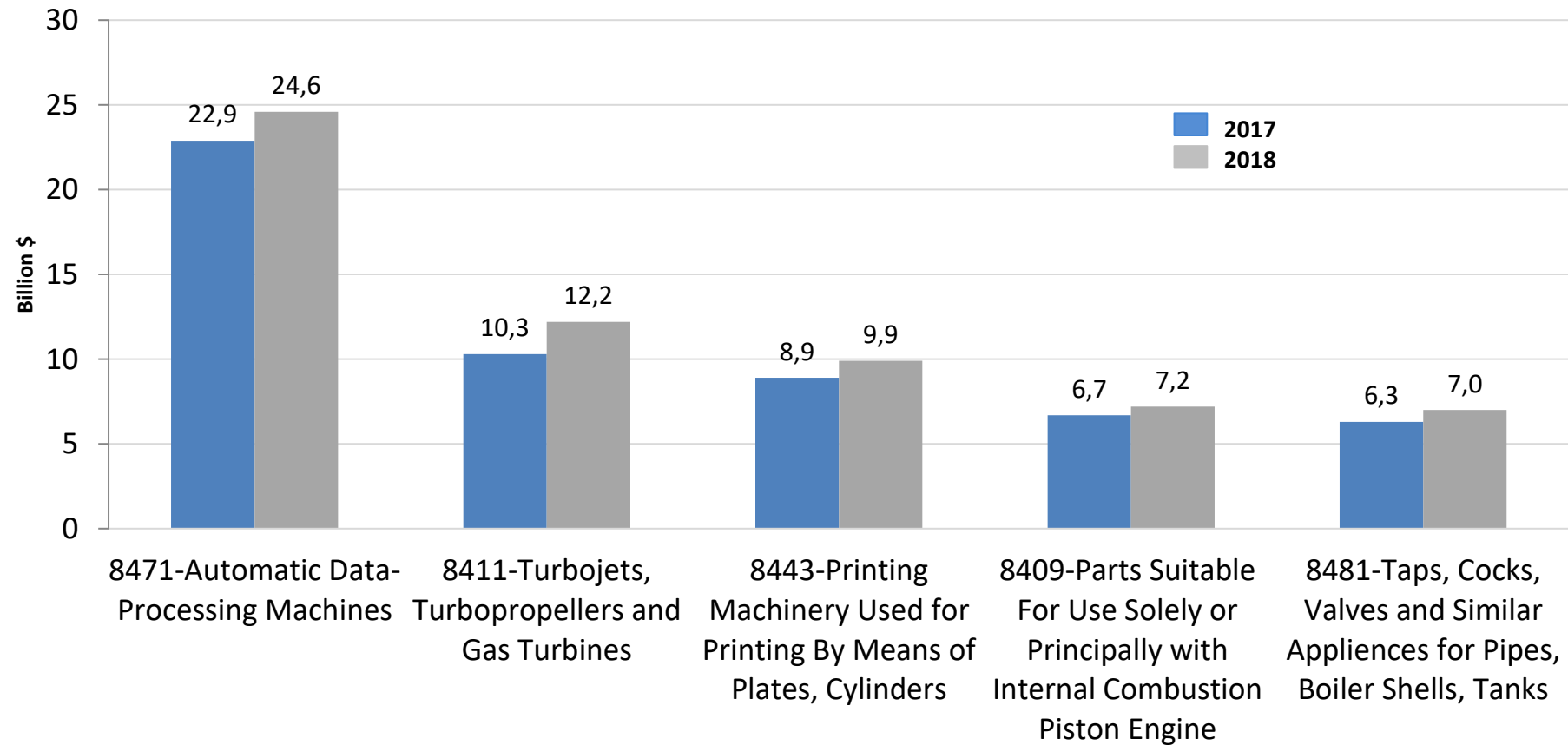
TOP 5 PRODUCT GROUPS IN TURKEY'S MACHINERY EXPORT TO GERMANY



In 2018, Turkey's export to Germany in following product groups increased remarkably;

- Leather Manufacturing Machinery (%127)
- Agricultural Machinery (%89)
- Material Handling, Lifting Machines (%81)
- Construction and Mining Machines (%71)
- Turbines Turbojets; Jet Propellers, Hydraulics (% 65)

TOP 5 PRODUCT GROUPS IN GERMANY MACHINERY IMPORT (HS CODE: 84)



STRENGTHS OF TURKISH MACHINERY INDUSTRY



Developed engineering skills and quick adaptation to new technologies, high level organization of the sector



Quality performance



Specialized, highly educated and skilled middle and senior managers



Delivery on the time



After sales services



Domestic supply of raw materials, lower manufacturing cost



Young workforce



Advanced sub-industry



Agility of adaptation to international manufacturing standards



Sufficient facilities (like industrial zones) and sufficient infrastructure



Flexible structure of SMEs (Most of the active companies in the Machine Manufacturing Industry in Turkey are SMEs)



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