



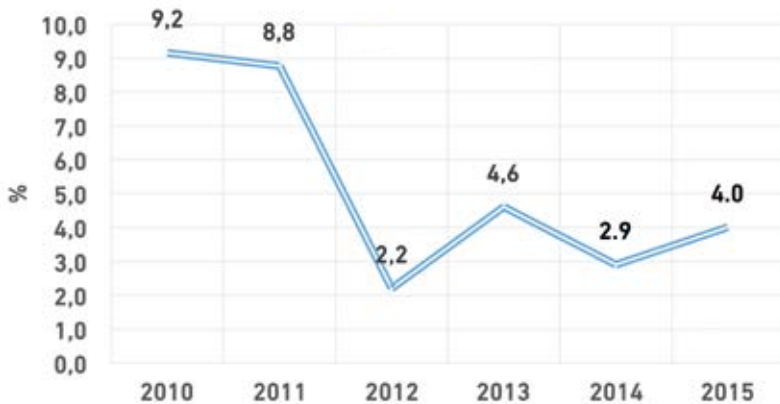
# TIAD

**MACHINE TOOLS INDUSTRIALISTS AND  
BUSINESSMEN ASSOCIATION OF TURKEY**

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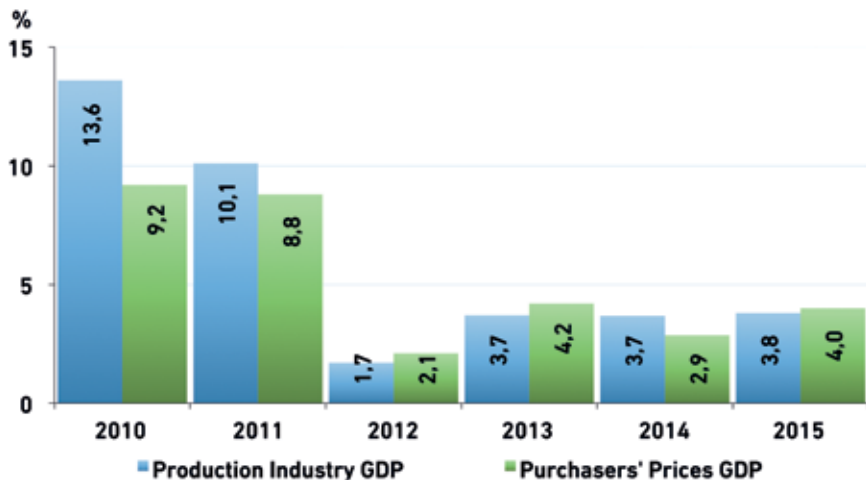
**STRONG UNITY REPRESENTING THE MACHINE TOOLS SECTOR**

## TURKEY'S GROWTH RATE 2010-2015



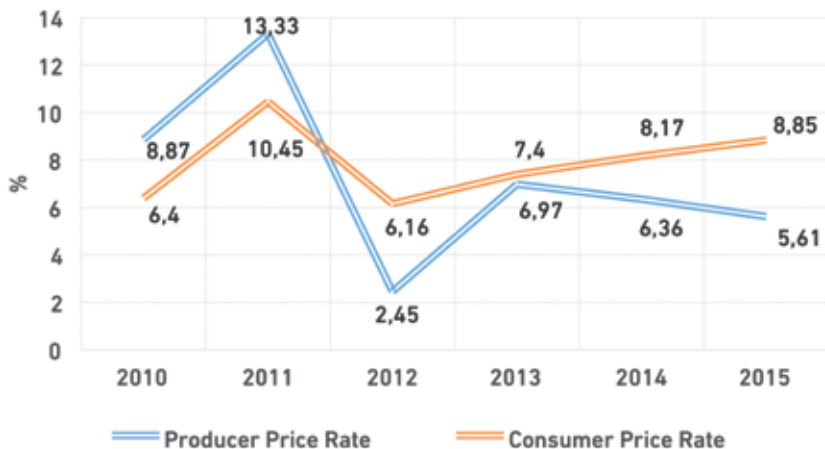
Source: Turkish Statistical Institute

## TURKEY'S RATE OF GDP 2010-2015



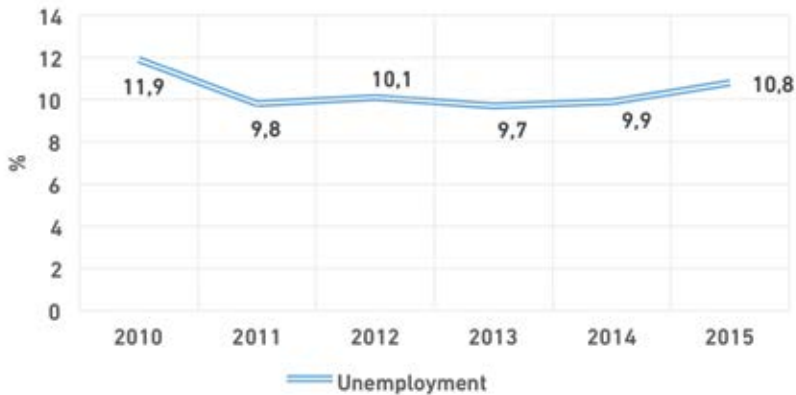
Source: Turkish Statistical Institute

## TURKEY'S RATE OF INFLATION 2010-2015



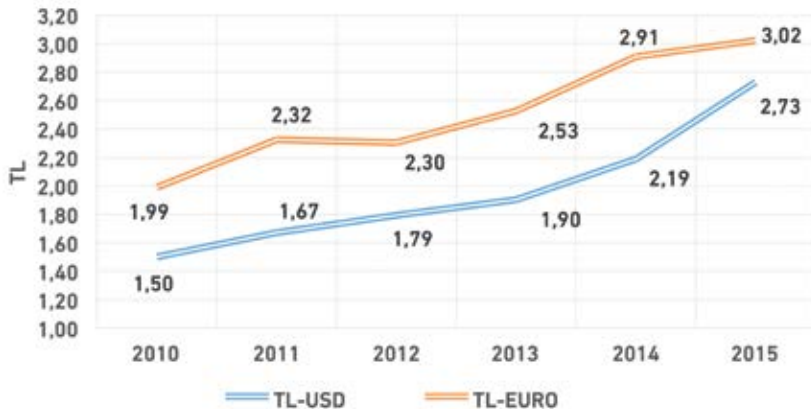
Source: Central Bank of The Republic Of Turkey

## TURKEY'S RATE OF UNEMPLOYMENT 2010-2015



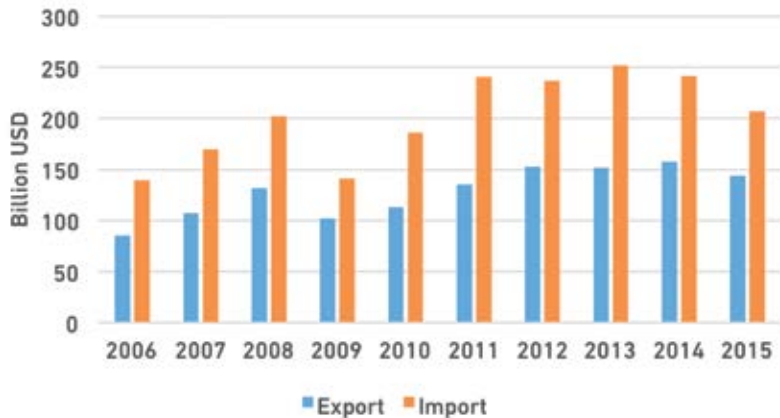
Source: Turkish Statistical Institute

## TL/USD & TL/EURO EXCHANGE RATES (AVERAGE)



Source: Central Bank of The Republic Of Turkey

## TURKEY'S FOREIGN TRADE



Source: Turkish Statistical Institute



**OVERVIEW OF TURKEY MACHINE TOOLS SECTOR**  
**MACHINE TOOL SECTOR DATA BY COUNTRY (IMPORT & EXPORT)**

IMPORT				EXPORT			
Country	2013 Million USD	2014 Million USD	2015 Million USD	Country	2013 Million USD	2014 Million USD	2015 Million USD
China	10.300,00	11.200,00	8.600,00	Germany	10.491,20	8.982,50	8.792,00
U.S.A	5.262,40	5.241,50	4.506,00	Japan	8.927,30	8.397,10	8.625,50
Germany	2.868,50	2.783,50	2.730,80	Italy	4.548,40	3.828,80	3.641,10
Mexico	2.002,20	1.655,30	2.187,70	China	2.810,00	3.300,00	3.200,00
Russia	1.618,10	1.869,10	1.756,00	Taiwan	3.548,00	3.753,00	3.186,00
Italy	916,30	1.021,00	1.470,90	Switzerland	2.697,50	2.613,30	2.586,50
S. Korea	1.386,00	1.496,00	1.407,00	S. Korea	2.216,00	2.236,00	2.342,00
Thailand	-	-	1.080,50	U.S.A	2.178,70	2.085,60	1.745,00
Turkey	1.162,00	989,00	1.031,00	Belgium	952,20	944,40	954,70
Vietnam	-	-	960,00	Spain	1.112,00	953,00	850,90
Japan	797,40	715,70	940,50	Hong Kong	-	-	750,00
Belgium	745,00	911,60	903,60	Austria	944,20	854,50	697,10
Canada	900,00	902,00	901,10	Czech Republic	704,20	699,30	693,80
India	822,00	811,10	897,20	U.K	829,10	737,80	660,50
France	923,00	876,40	890,30	France	609,60	598,00	575,00
U.K	891,70	893,10	785,70	Turkey	471,40	484,00	459,00

Source: Gardner Business Inc.

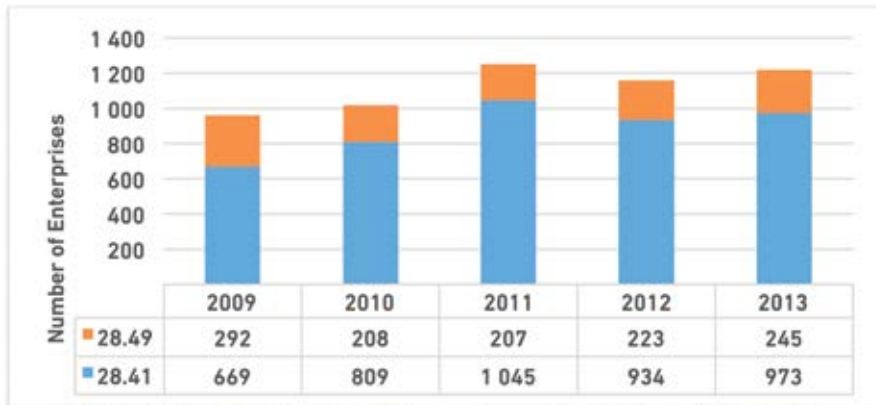


### MACHINE TOOL SECTOR DATA BY COUNTRY (PRODUCTION & CONSUMPTION)

PRODUCTION				CONSUMPTION			
Country	2013 Million USD	2014 Million USD	2015 Million USD	Country	2013 Million USD	2014 Million USD	2015 Million USD
China	24.980,00	23.800,00	22.100,00	China	32.470,00	31.700,00	27.500,00
Japan	12.326,40	12.831,60	13.489,50	U.S.A	8.039,80	8.056,30	7.361,00
Germany	14.687,70	12.957,20	12.422,00	Germany	7.065,00	6.758,20	6.360,80
Italy	5.710,40	5.074,70	5.306,30	Japan	4.196,50	5.150,20	5.804,50
S. Korea	5.306,00	5.631,00	4.758,00	S. Korea	4.476,00	4.891,00	3.823,00
U.S.A	4.956,10	4.900,40	4.600,00	Italy	2.078,30	2.266,90	3.136,10
Taiwan	4.537,00	4.700,00	4.030,00	Mexico	2.245,60	1.708,90	2.214,10
Switzerland	3.129,10	3.111,70	3.052,80	Russia	1.711,90	2.030,20	2.177,00
Spain	1.218,60	1.083,00	1.003,30	Taiwan	1.629,00	1.687,00	1.564,00
Austria	1.094,30	1.101,20	938,00	India	1.441,00	1.416,50	1.541,00
U.K	891,70	931,90	825,30	Turkey	1.399,70	1.227,00	1.278,00
Turkey	709,20	722,00	706,00	Canada	1.099,70	1.235,00	1.178,30
India	658,00	645,30	690,80	Thailand	-	1.843,6	1.173,8
France	686,60	698,90	645,00	Switzerland	1.079,00	1.081,80	1.038,00
Czech Republic	705,60	625,90	641,60	Vietnam	-	991,10	969,90
Canada	803,40	571,00	530,80	France	1.000,00	977,30	960,30

Source: Gardner Business Inc.

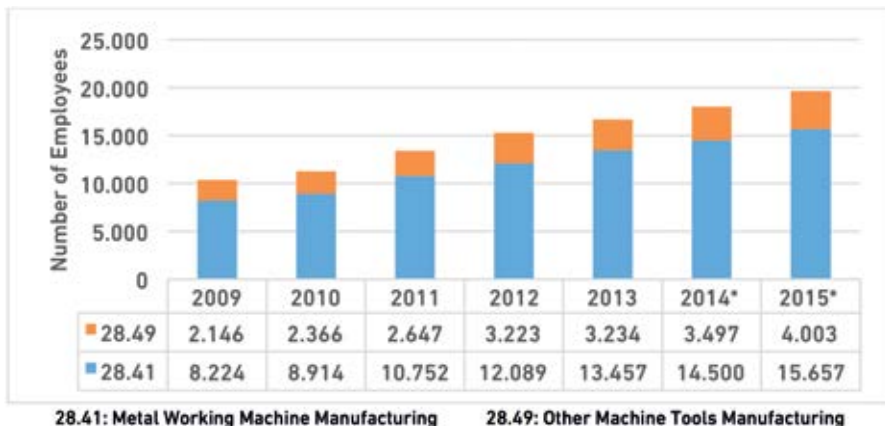
## NUMBER OF ENTERPRISES IN METAL WORKING MACHINE AND MACHINE TOOL MANUFACTURING



**28.41: Metal Working Machine Manufacturing**

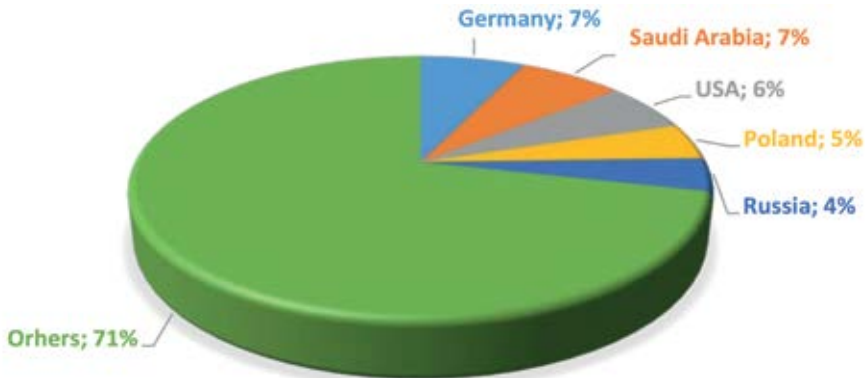
**28.49: Other Machine Tools Manufacturing**

## NUMBER OF EMPLOYEES IN METAL WORKING MACHINE AND MACHINE TOOL MANUFACTURING



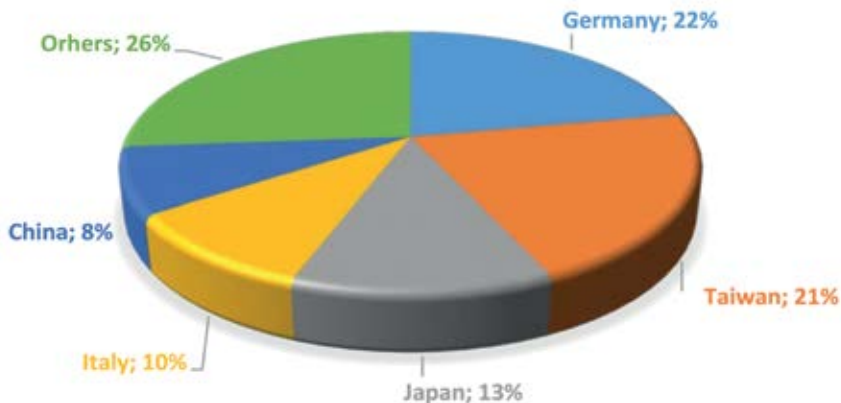
Source: TURKSTAT Business Statistics, \*Calculated using TURKSTAT 2014 and 2015 Employment Statistics for the sector.

## SHARE OF TOP 5 COUNTRIES IN TURKEY'S TOTAL METAL WORKING MACHINE EXPORTS - 2015



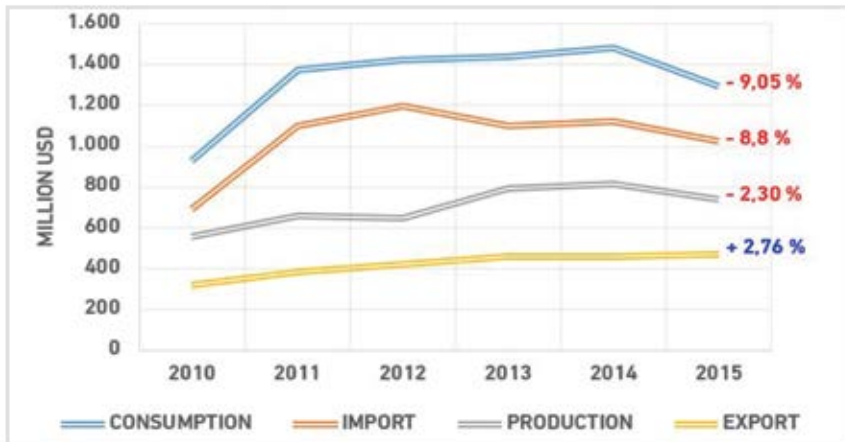
Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

## SHARE OF TOP 5 COUNTRIES IN TURKEY'S TOTAL METAL WORKING MACHINE IMPORTS – 2015



Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

## TURKISH MACHINE TOOLS INDUSTRY GENERAL OUTLOOK 2010 to 2015



Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

**TURKISH MACHINE TOOLS INDUSTRY, METAL WORKING MACHINE SECTOR DATA**

	<b>PRODUCTION</b>	<b>CHANGE</b>	<b>EXPORT</b>	<b>CHANGE</b>	<b>IMPORT</b>	<b>CHANGE</b>	<b>CONSUMPTION</b>	<b>CHANGE</b>
	<b>(Million USD)</b>	<b>RATIO</b>	<b>(Million USD)</b>	<b>RATIO</b>	<b>(Million USD)</b>	<b>RATIO</b>	<b>(Million USD)</b>	<b>RATIO</b>
<b>2010</b>	145,00	11,97%	76,47	14,10%	485,33	59,25%	553,86	50,82%
<b>2011</b>	158,26	9,14%	95,79	25,26%	770,74	58,81%	833,21	50,44%
<b>2012</b>	155,76	-1,58%	105,59	10,23%	841,57	9,19%	891,74	7,02%
<b>2013</b>	259,00	66,28%	135,09	27,94%	789,65	-6,17%	913,56	2,45%
<b>2014</b>	247,40	-4,48%	144,19	6,74%	830,22	5,14%	933,43	2,18%
<b>2015</b>	241,71	-2,30%	161,95	12,32%	763,18	-8,07%	842,94	-9,69%

Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

**TURKISH MACHINE TOOLS INDUSTRY, METAL CUTTING MACHINE SECTOR DATA**

	PRODUCTION (Million USD)	CHANGE RATIO	EXPORT (Million USD)	CHANGE RATIO	IMPORT (Million USD)	CHANGE RATIO	CONSUMPTION (Million USD)	CHANGE RATIO
2010	410,00	31,52%	241,71	7,04%	205,35	7,01%	373,64	34,48%
2011	501,14	22,23%	291,61	20,64%	331,05	61,21%	540,58	44,68%
2012	493,24	-1,58%	318,10	9,08%	357,59	8,02%	532,73	-1,45%
2013	533,00	8,06%	322,84	1,49%	312,81	-12,52%	522,97	-1,83%
2014	508,85	-4,53%	313,39	-2,93%	293,50	-6,17%	488,96	-6,50%
2015	497,14	-2,30%	308,23	-1,65%	261,72	-10,83%	450,63	-7,84%

Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)



**TOP TEN COUNTRIES SUPPLYING TURKEY'S MACHINE TOOLS IMPORT**

<b>Country</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Change Rate %</b>
<b>Germany</b>	229.774.419	227.807.535	225.672.391	-0,94%
<b>Taiwan</b>	211.223.976	245.351.304	217.766.661	-11,24%
<b>Japan</b>	109.119.833	111.394.684	126.643.814	13,69%
<b>Italy</b>	147.818.501	148.945.641	101.814.441	-31,64%
<b>China</b>	68.789.730	83.325.079	84.116.809	0,95%
<b>S. Korea</b>	68.917.328	69.048.360	62.713.728	-9,17%
<b>Switzerland</b>	50.029.554	55.106.109	61.906.829	12,34%
<b>USA</b>	24.332.853	26.435.601	25.941.895	-1,87%
<b>Spain</b>	22.599.250	27.975.626	19.842.559	-29,07%
<b>France</b>	28.981.460	14.639.161	13.760.069	-6,01%

Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

**TOP TEN COUNTRIES SUPPLYING TURKEY'S MACHINE TOOLS EXPORT**

<b>Country</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Change Rate %</b>
<b>Germany</b>	28.334.417	27.302.330	33.036.662	21,00%
<b>S. Arabia</b>	16.195.348	17.656.325	32.804.566	85,79%
<b>USA</b>	22.198.489	30.626.896	28.493.438	-6,97%
<b>Poland</b>	15.969.484	19.898.297	20.822.272	4,64%
<b>Russia</b>	49.608.074	33.195.535	19.224.530	-42,09%
<b>Iran</b>	8.009.681	13.261.217	14.543.079	9,67%
<b>Canada</b>	15.482.518	10.375.722	13.531.157	30,41%
<b>Algeria</b>	7.850.376	11.966.245	13.109.656	9,56%
<b>England</b>	7.791.552	8.871.571	12.132.157	36,75%
<b>Czech Republic</b>	6.562.959	9.089.971	13.011.586	43,14%

Source: TURKSTAT (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

TURKEY'S MEASURING SYSTEMS EXPORT & IMPORT

<b>MEASUREMENT SYSTEMS</b>				
	<b>2012</b> (MillionUSD)	<b>2013</b> (MillionUSD)	<b>2014</b> (MillionUSD)	<b>2015</b> (MillionUSD)
<b>EXPORT</b>	32	47,94	51,49	16,75
<b>CHANGE RATIO</b>	39,13%	49,81%	7,41%	-67,47%
<b>IMPORT</b>	344	338,94	369,75	180,18
<b>CHANGE RATIO</b>	16,22%	-1,47%	9,09%	-51,27%

Source: TURKSTAT (9031 HS Code has been included.)

**TURKEY'S CUTTING TOOLS EXPORT & IMPORT**

<b>CUTTING TOOLS</b>				
	<b>2012</b> (MillionUSD)	<b>2013</b> (MillionUSD)	<b>2014</b> (MillionUSD)	<b>2015</b> (MillionUSD)
<b>EXPORT</b>	20	24,47	28,41	23,14
<b>CHANGE RATIO</b>	-9,09%	22,35%	16,10%	-18,55%
<b>IMPORT</b>	98	99,11	110,24	96,71
<b>CHANGE RATIO</b>	2,08%	1,13%	11,23%	-12,27%

Source: TURKSTAT (820740109000, 820750700000, 820770100000, 820770310019, 820780190000, 820900800000, 820900200000 HS Codes have been included.)

TURKEY'S TOOL HOLDERS EXPORT & IMPORT

<b>TOOL HOLDERS</b>				
	<b>2012</b> (MillionUSD)	<b>2013</b> (MillionUSD)	<b>2014</b> (MillionUSD)	<b>2015</b> (MillionUSD)
<b>EXPORT</b>	18	18,7	20,14	9,51
<b>CHANGE RATIO</b>	-14,29%	3,89%	7,70%	-52,78%
<b>IMPORT</b>	23	23,01	21,93	19,62
<b>CHANGE RATIO</b>	9,52%	0,04%	-4,69%	-10,53%

Source: TURKSTAT (846610380000, 846620980000, 846620910019 HS Codes have been included.)



# TIAD

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**STRONG UNITY REPRESENTING THE MACHINE TOOLS SECTOR**

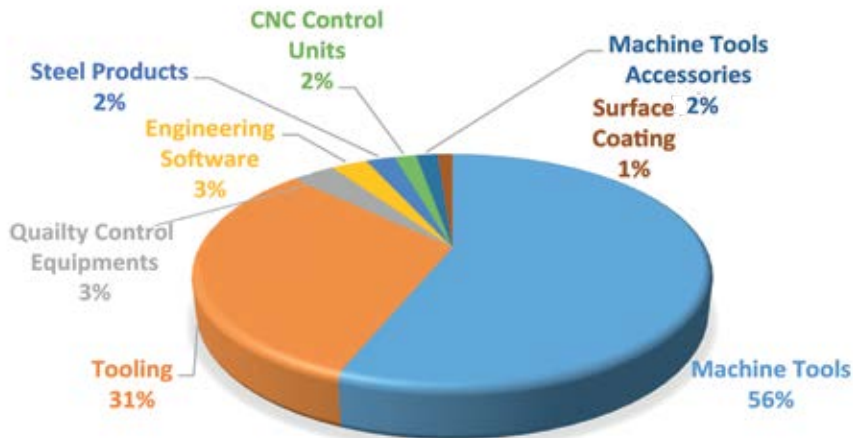


***MACHINE TOOLS INDUSTRIALISTS AND BUSINESSMEN ASSOCIATION OF TURKEY  
(TIAD)***

Machine Tools Industrialists and Businessmen Association (TIAD) of Turkey is a professional organization established in 1992 with the aim of gathering industrialists and businessmen dealing with imports, exports, manufacturing, wholesale and/or retail trade of machine tools, their complementary accessories and tooling equipment which are among the fundamental means of the manufacturing processes. The mission of the Association is to represent its members in the best way on all national and international platforms.

By May 2016, the number of TIAD members has reached 182 and more than 80% of the machine tools demand in Turkey is met by TIAD members.

## DISTRIBUTION OF TIAD MEMBERS







TIAD became a member of the European Trade Association for Machine Tools, Tooling and Technologies (CELIMO) as of 2000. Having presided over CELIMO in the 2006-2008 term, TIAD still holds Board Member status in this international association. CELIMO currently represents 1,200 machine tool distributor companies holding more than 10 billion Euro total capital, and it constitutes a fundamental market for Turkey's exporters.

TIAD performs activities both for the benefit of the country and its members. These activities are carried out through Committees and Working Groups constituted within its corporate structure.

In this framework, TIAD has Fair, Laws and Regulations, Media and Advertising, Membership Development and Coordination, Training, After Sales Services Committees, as well as "Working Groups" of Tooling, Metrology, CAD / CAM, Metal Forming Machine and Metal Cutting Machine.



## REPRESENTATION ACTIVITIES

*TIAD's major representation activities include the*

### **National Area;**

- *Union of Chambers and Commodity Exchanges of Turkey (TOBB) Machine and Equipment Manufacturing Sector Assembly,*
- *Machinery Technical Committee (MAKTEK) established and working under Turkish Ministry of Science, Industry and Technology,*
- *MAKTEK Machine Tools Sub-committee,*

### **International Area;**

- Board Member of CELIMO.



Republic of Turkey  
Ministry of Science, Industry and Technology



## REPRESENTATION ACTIVITIES

### OUR COOPERATING ASSOCIATIONS



*Spain*



*Italy*

ITALIAN TRADE AGENCY  
ICE - Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane



*South Korea*

Korea Trade-Investment  
Promotion Agency



*United Kingdom*



*Japan*

Japan External Trade Organization



*Taiwan*

TAITRA



*South Korea*



## **TIAD'S ENTERPRISE ACTIVITY**

### **TIAD ORGANISATIONAL SERVICES ENTERPRISE**

***TIAD leads organization of comprehensive machine tool fairs in Turkey.***

***Within the scope of this effort;***

- **MAKTEK EURASIA** - Machine Tools, Metal Processing Machines, Welding, Cutting, Drilling Technologies, Quality Control & Test Equipment Fair
- **BURSA METAL WORKING** – International Metal Processing Machines, Welding, Cutting, Drilling Technologies, Hand Tools, Pneumatic & Hydraulic Fair
- **KONYA METAL WORKING** - International Metal Processing Machines, Welding, Cutting, Drilling Technologies, Hand Tools, Pneumatic & Hydraulic Fair
- **QUALITY** - Control, Metrology, Testing Equipment and Industrial Software Fair

***Fairs are supported by our Association.***



## TIAD'S ENTERPRISE ACTIVITY

### *TIAD ORGANISATIONAL SERVICES ENTERPRISE*

#### ***International Fair Organizations***

*TIAD keeps tabs on international fairs concerning the sector and communicates all the machine tool fairs across the world as a list to its members through bulletins and its website. TIAD also arranges travelling and accommodation organizations to help its members visit important fairs with affordable conditions. Moreover, TIAD also participates international fairs individually as an association to promote its member companies and the sector.*





## **TIAD'S ENTERPRISE ACTIVITY**

### ***TIAD PRESS AND PUBLICITY SERVICES ENTERPRISE***

#### **TT MAGAZIN – MACHINE TOOLS AND MANUFACTURING TECHNOLOGIES MAGAZINE**

*Through the channel of its bimonthly TT Magazin, TIAD keeps its members and machine tool users up-to-date with the latest technical and technological developments in national and global markets.*

*Since 2004, TT Magazin held its readability at the highest level with its quality informative content, while offering a great opportunity to its advertiser companies to find their target audiences through accurate and affective distribution. Printed 4.000 hardcopies. TT Magazin is also communicated online to 7.000 e-mail addresses in Turkey.*





## TIAD'S ENTERPRISE ACTIVITY

### TIAD TRAINING AND CONSULTANCY SERVICES ENTERPRISE

*TIAD ACADEMY contributes to the progress and development of Turkey by providing the correct, efficient and effective use of "Machine Tools", described as "the main tools to produce manufacturing machinery" which are essential in various manufacturing industries, especially in aerospace, aircraft, defence, white goods, automotive, ship construction, machinery, casting, construction, textiles, food and furniture sectors. Within TIAD Academy, training programmes are developed and applied to realize the target of producing intermediate goods used in most manufacturing sectors with less cost and producing more value added products and exporting them to the whole world.*

#### OUR TRAININGS

- *Basics of Machining* • *CNC Lathe Operatorship ve Programming* • *Computer Aided Design (CAD)*
  - *CNC Machining Centre Operatorship ve Programming* • *Computer Aided Design (CAD)*
    - *Computer Aided Manufacturing (CAM)*





## **TIAD'S ENTERPRISE ACTIVITY**

### ***TIAD VOCATIONAL TEST CENTER ENTERPRISE***

*In March 2011, TIAD was granted by the European Union (EU), with the approval of and through the Turkish Central Finance and Contracts Unit under the "VOC-Test Center Grant Scheme". In the course of the "Developing and Operating Machine Tools VOC-Test Center" project,*

*TIAD established the occupational standards and vocational qualifications for*

- NC/CNC Machine Tools Mechanical Service Responsible,*
- NC/CNC Machine Tools Electric/Electronic Service Responsible*
- NC/CNC Machine Tools Application Responsible*

*in line with European Qualifications Framework (EQF). TIAD MTM, having ISO 9001 and ISO 17024 Standards, makes two theoretical and implementation tests to the candidates before issuing the certificates. These certificates will also be recognized by the EU Member States in the future.*





## **TIAD'S ENTERPRISE ACTIVITY**

### **TIAD VOCATIONAL TEST CENTER ENTERPRISE**

*In accordance with this standard and qualifications, the "Vocational Qualification Assessment and Examination System" is established and began to be implemented. TIAD Vocational Test Center (TIAD MTM) got accreditation from TURKAK (Turkish Accreditation Agency) in December 12th, 2013 and authorization from MYK (Vocational Qualification Authority) on July 1st, 2014.*

*TIAD has been granted with a fund by European Union (EU) for the qualification exams under the "National Vocational Qualification System Development and Implementation of Turkey Qualifications Framework EU Project" and signed a protocol.*


*Under the protocol, the exam fees will be covered by EU funding for over 600 people in 2 years (2015-2017).*



STRONG  
UNITY  
REPRESENTING  
THE MACHINE  
TOOLS SECTOR

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