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STRONG UNITY REPRESENTING THE MACHINE TOOLS SECTOR

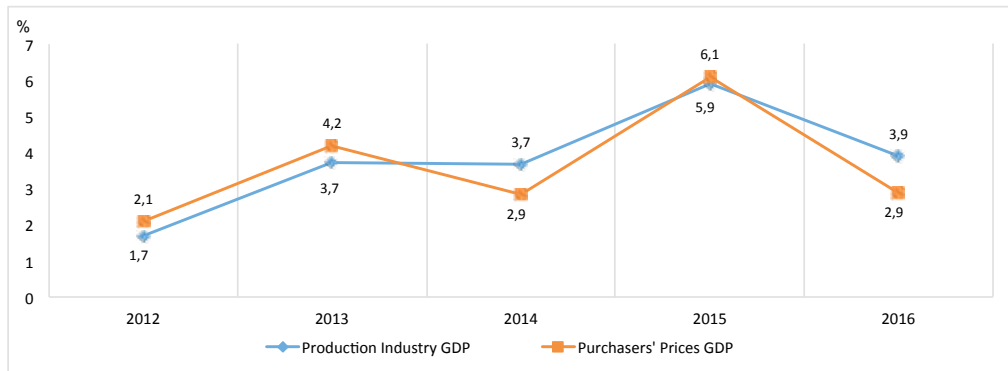
**TIAD**

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

**TURKEY** MACHINE TOOLS  
AND ACCESSORIES  
SECTOR REPORT

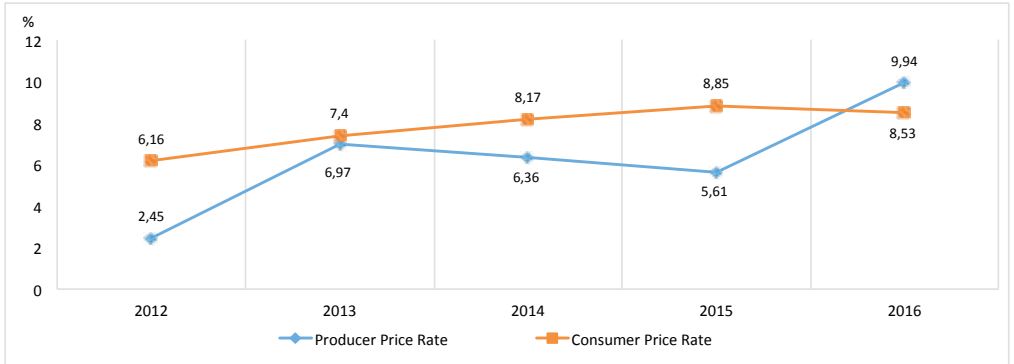
**2016**

## OVERVIEW OF TURKEY'S GENERAL ECONOMIC SITUATION TURKEY'S RATE OF GDP 2012-2016



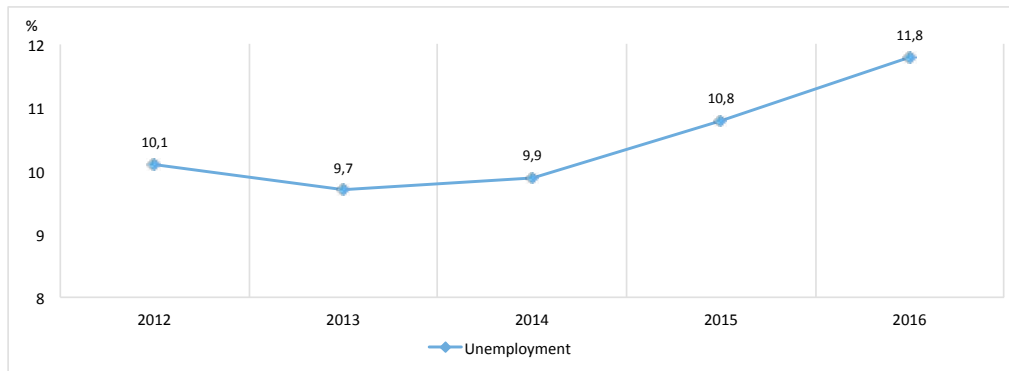
Source: Turkish Statistical Institute

## TURKEY'S RATE OF INFLATION 2012-2016



Source: Central Bank of The Republic Of Turkey

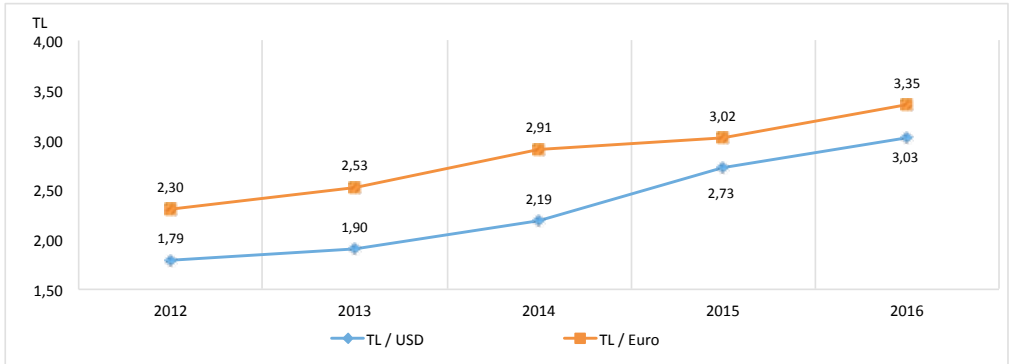
## TURKEY'S RATE OF UNEMPLOYMENT 2012-2016



Source: Turkish Statistical Institute

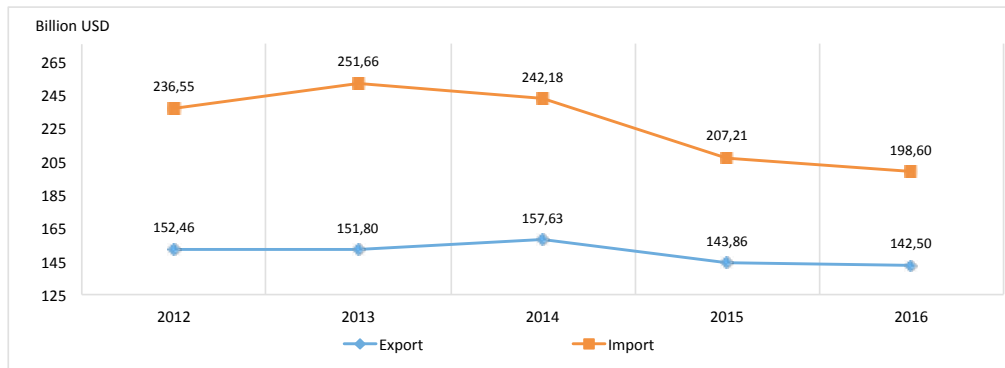


## TL/USD & TL/EURO EXCHANGE RATES (AVERAGE)



Source: Central Bank of The Republic Of Turkey

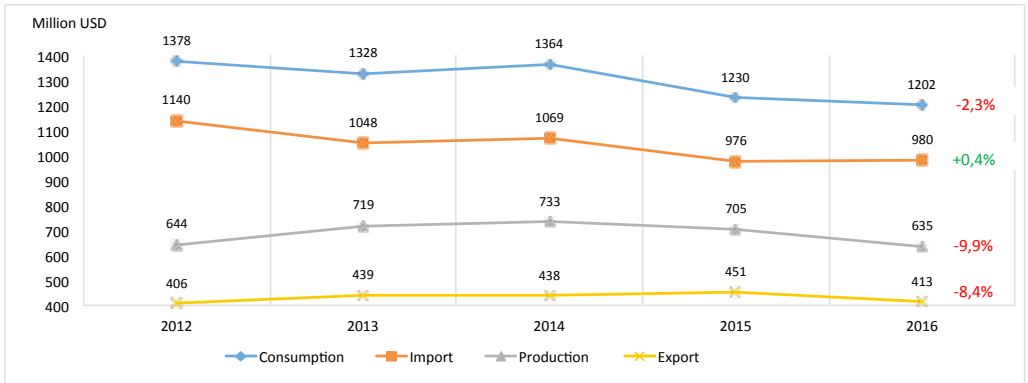
## TURKEY'S FOREIGN TRADE



Source: Turkish Statistical Institute

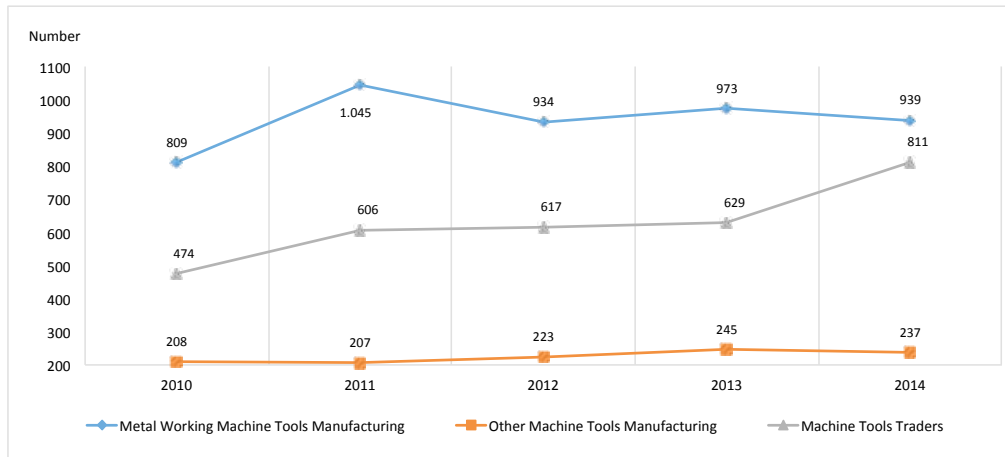
## OVERVIEW OF TURKEY MACHINE TOOLS SECTOR

### FOREIGN TRADE OF TURKEY'S MACHINE TOOLS SECTOR



Source: Turkish Statistical Institute

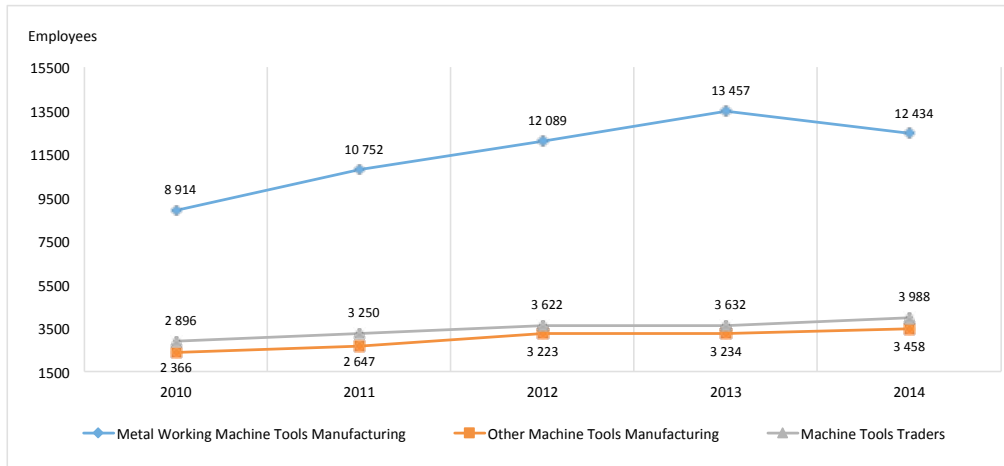
## NUMBER OF ENTERPRISES IN TURKEY'S MACHINE TOOLS SECTOR



Source: Turkish Statistical Institute

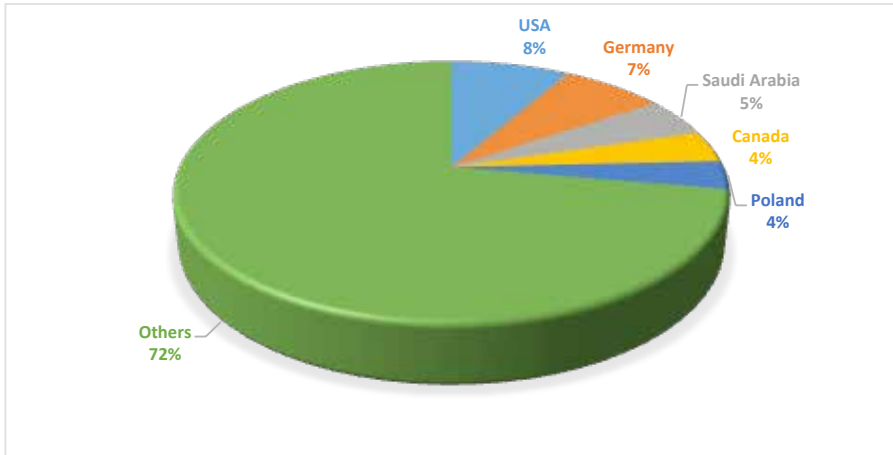


## NUMBER OF EMPLOYEES IN TURKEY'S MACHINE TOOLS SECTOR



Source: Turkish Statistical Institute

## SHARE OF TOP 5 COUNTRIES IN TURKEY'S TOTAL MACHINE TOOLS EXPORT - 2016



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



### TURKEY'S TOTAL MACHINE TOOLS EXPORT

	2015 (USD)	2016 (USD)	Change Rate (%)
USA	27.871.831	35.964.121	29,03%
Germany	32.123.738	30.850.232	-3,96%
Saudi Arabia	31.880.048	20.347.269	-36,18%
Canada	13.437.951	17.015.063	26,62%
Poland	18.751.531	13.310.711	-29,02%
Russia	18.538.800	12.970.689	-30,03%
Algeria	12.524.792	10.223.011	-18,38%
Iran	13.449.474	9.788.748	-27,22%
England	11.095.026	8.920.887	-19,60%
Free Zones	10.305.197	7.542.992	-26,80%
Czech Republic	12.974.633	5.500.709	-57,60%
Iraq	9.728.394	4.791.151	-50,75%
Other Countries	237.919.961	235.355.035	-1,08%
<b>Total</b>	<b>450.601.376</b>	<b>412.580.618</b>	<b>-8,44%</b>

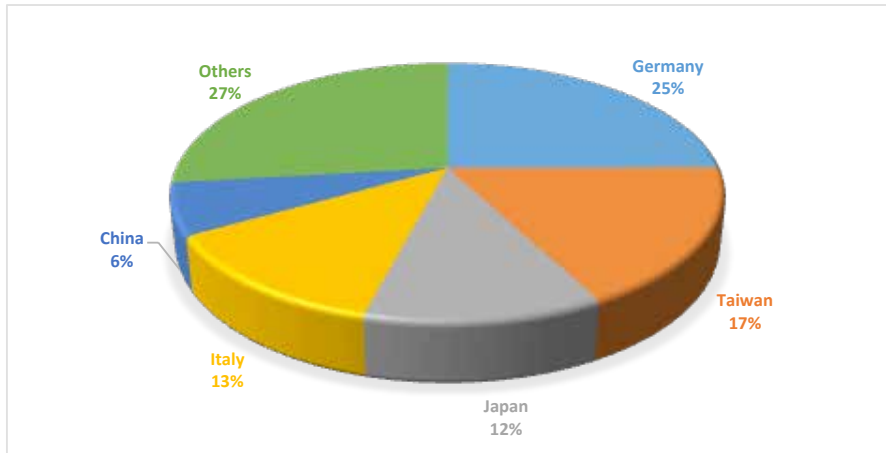
Source: Turkish Statistical Institute (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

### TURKEY'S MACHINE TOOLS EXPORT BY PRODUCT TYPE

	HS4 Code	2015 (USD)	2016 (USD)	Change Rate (%)
Electro Erosion, Laser, Water Jet	8456	86.470.513	88.029.950	1,80%
Machining Center, Transfer Machines	8457	11.319.794	8.593.476	-24,08%
Lathe	8458	6.356.128	6.714.611	5,64%
Milling, Drilling, Reaming, Threading and Tapping Machines	8459	11.230.632	10.093.365	-10,13%
Grinding, Tool Sharpening, Honing, Lapping Machines	8460	7.601.491	7.170.860	-5,67%
Shaper, Broach, Gear Cutting/Grinding, Sawing, Slitter Machines	8461	19.671.525	16.013.155	-18,60%
Hammering, Rounding/Straightening and Hydraulic Press, Guillotine, Punch, Press Brake	8462	282.786.894	254.965.187	-9,84%
Tube/Wire Drawing, Screw-Cutting, Wire Drawing Machines	8463	25.164.399	21.000.014	-16,55%
<b>TOTAL</b>		<b>450.601.376</b>	<b>412.580.618</b>	<b>-8,44%</b>

Source: Turkish Statistical Institute

## SHARE OF TOP 5 COUNTRIES IN TURKEY'S TOTAL MACHINE TOOLS IMPORT - 2016



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

### TURKEY'S TOTAL MACHINE TOOLS IMPORT

	2015 (USD)	2016 (USD)	Change Rate (%)
Germany	218.183.218	243.892.376	11,78%
Taiwan	207.506.351	174.817.023	-15,75%
Italy	98.258.630	126.008.150	28,24%
Japan	123.063.493	115.037.283	-6,52%
China	77.136.451	63.081.058	-18,22%
South Korea	55.110.419	51.870.171	-5,88%
Switzerland	56.375.217	36.290.888	-35,63%
USA	23.163.868	25.894.529	11,79%
Spain	18.656.110	24.171.980	29,57%
Free Zones	9.607.038	10.992.602	14,42%
France	13.922.778	8.636.289	-37,97%
Belgium	3.630.398	7.560.330	108,25%
Others	71.042.777	91.528.259	28,84%
<b>Total</b>	<b>975.656.748</b>	<b>979.780.938</b>	<b>0,42%</b>

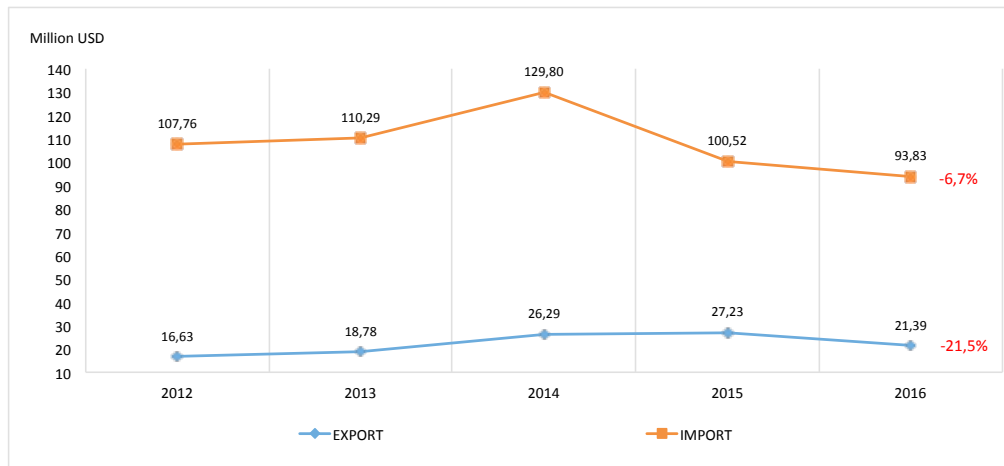
Source: Turkish Statistical Institute (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

### TURKEY'S MACHINE TOOLS IMPORT BY PRODUCT TYPE

	HS4 Code	2015 (USD)	2016 (USD)	Change Rate (%)
Electro Erosion, Laser, Water Jet	8456	87.649.678	90.646.106	3,42%
Machining Center, Transfer Machines	8457	267.832.704	265.424.605	-0,90%
Lathe	8458	185.066.817	172.157.194	-6,98%
Milling, Drilling, Reaming, Threading and Tapping Machines	8459	66.390.111	65.180.996	-1,82%
Grinding, Tool Sharpening, Honing, Lapping Machines	8460	72.941.465	72.433.703	-0,70%
Shaper, Broach, Gear Cutting/Grinding, Sawing, Slitter Machines	8461	34.053.568	44.383.119	30,33%
Hammering, Rounding/Straightening and Hydraulic Press, Guillotine, Punch, Press Brake	8462	208.959.844	204.643.289	-2,07%
Tube/Wire Drawing, Screw-Cutting, Wire Drawing Machines	8463	52.762.561	64.911.926	23,03%
<b>TOTAL</b>		<b>975.656.748</b>	<b>979.780.938</b>	<b>0,42%</b>

Source: Turkish Statistical Institute

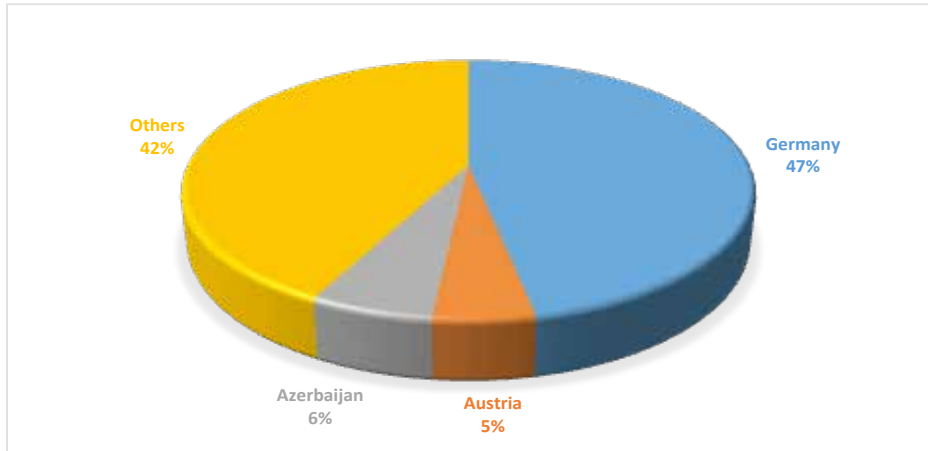
## FOREIGN TRADE OF TURKEY'S CUTTING TOOLS



Source: Turkish Statistical Institute

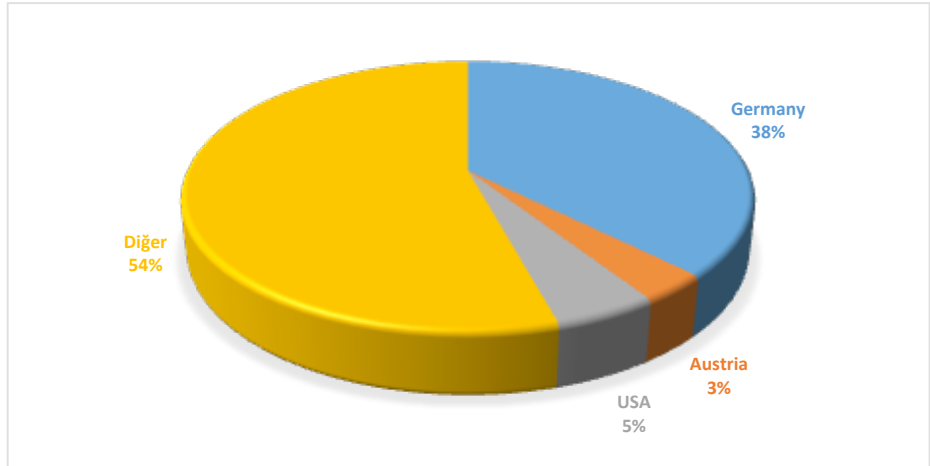


## CUTTING TOOLS EXPORT DISTRIBUTION OF TURKEY – 2016



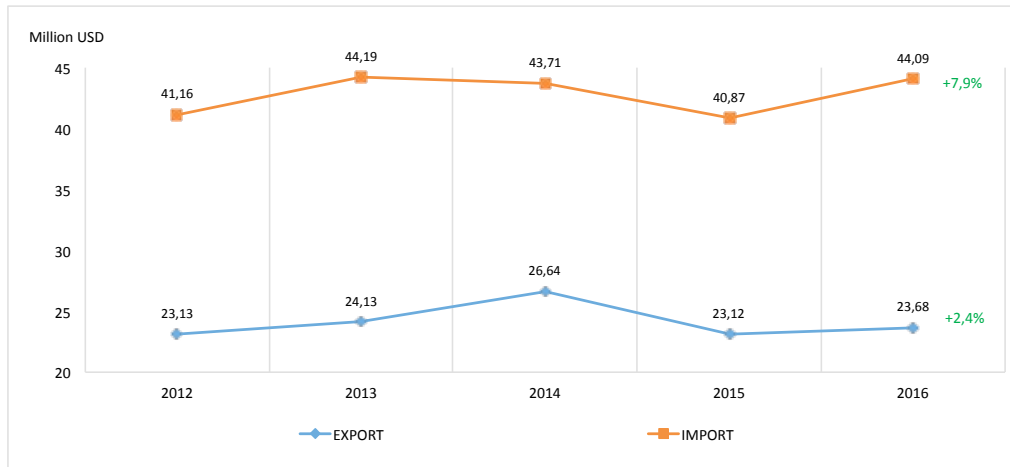
Source: Turkish Statistical Institute

## CUTTING TOOLS IMPORT DISTRIBUTION OF TURKEY – 2016



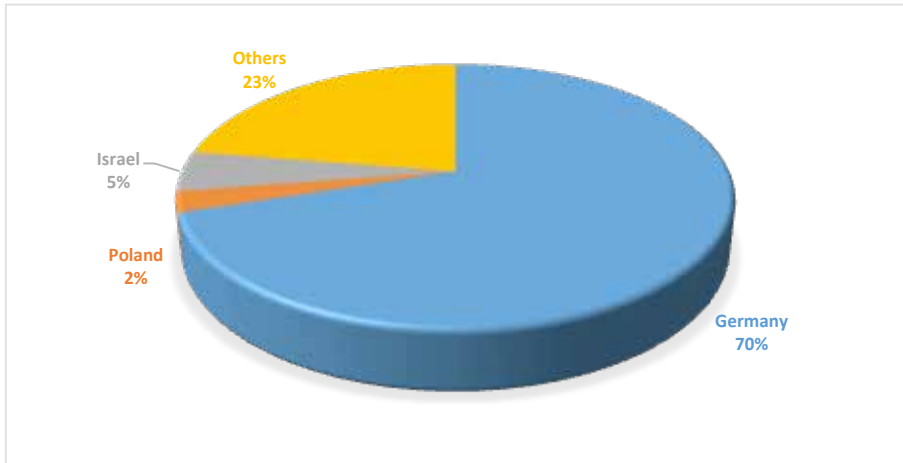
Source: Turkish Statistical Institute

## FOREIGN TRADE OF TURKEY'S HOLDING TOOLS



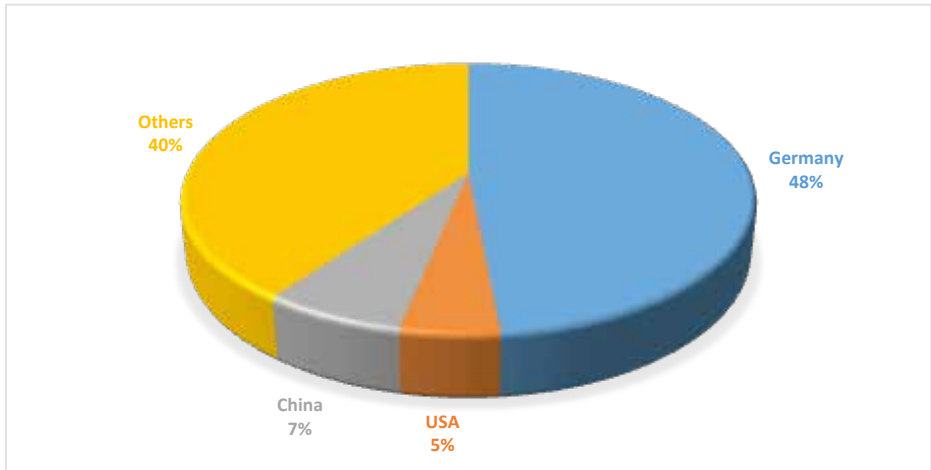
Source: Turkish Statistical Institute

## HOLDING TOOLS EXPORT DISTRIBUTION OF TURKEY – 2016



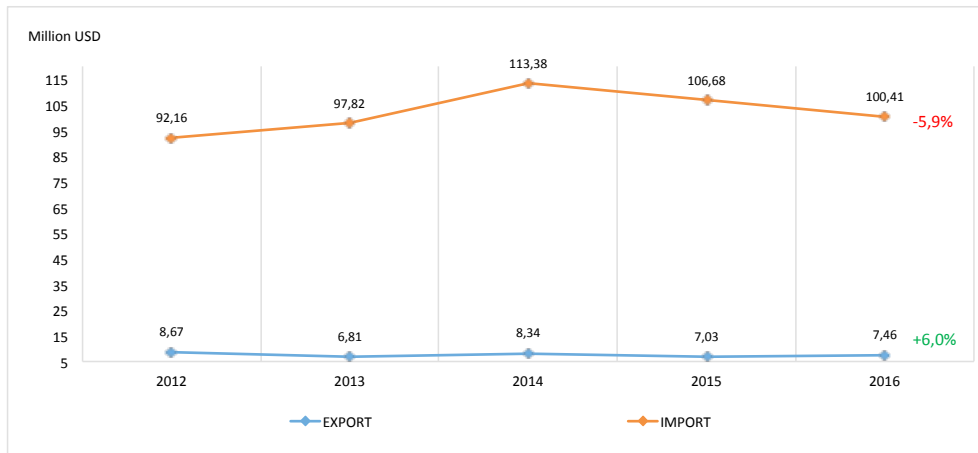
Source: Turkish Statistical Institute

## HOLDING TOOLS IMPORT DISTRIBUTION OF TURKEY – 2016



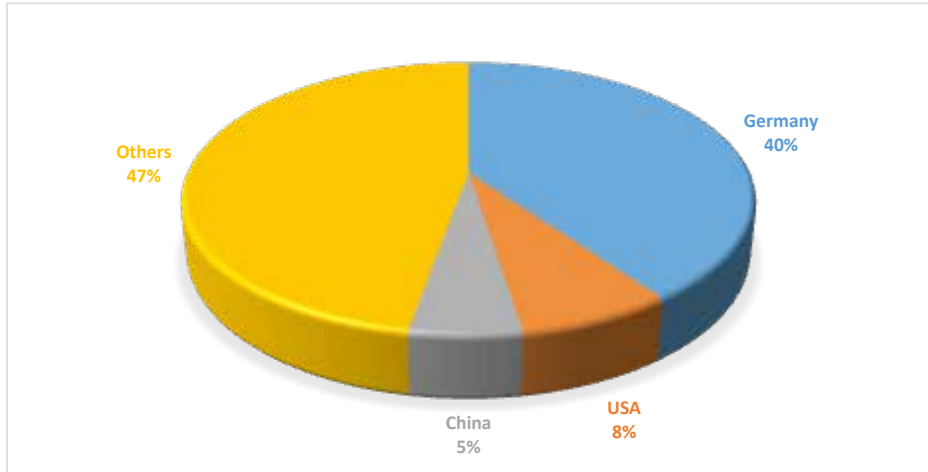
Source: Turkish Statistical Institute

## FOREIGN TRADE OF TURKEY'S MEASUREMENT EQUIPMENTS



Source: Turkish Statistical Institute

## MEASUREMENT EQUIPMENTS IMPORT DISTRIBUTION OF TURKEY – 2016



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STRONG UNITY REPRESENTING THE MACHINE TOOLS SECTOR

**TIAD**

**MACHINE TOOLS INDUSTRIALISTS AND  
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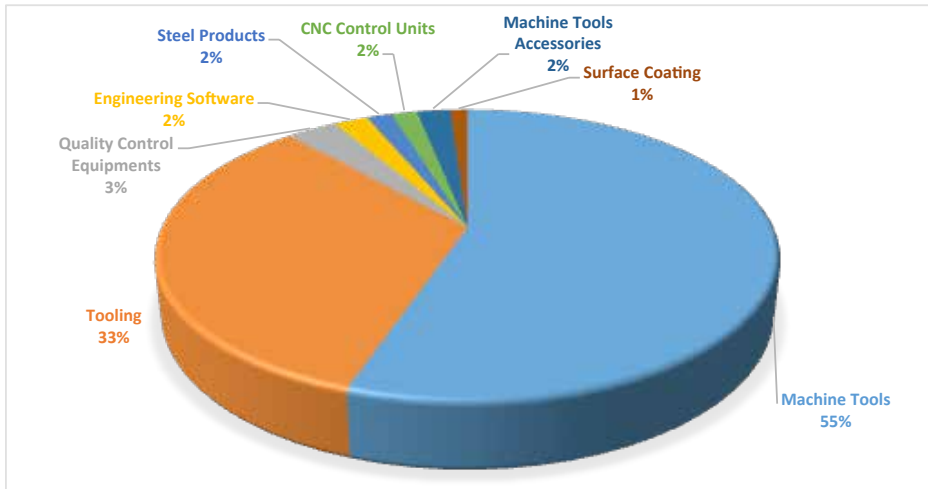


**MACHINE TOOLS INDUSTRIALISTS AND BUSINESSMEN ASSOCIATION (TIAD)  
OF TURKEY**

*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 at all national and international platforms.*

*By May 2017, the number of TIAD members has reached 190 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**



## OUR COOPERATING ASSOCIATIONS



*Spain*



*South Korea*



*Japan*



*South Korea*



*Italy*



*United Kingdom*



*Taiwan*



## 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 – Sheet Metal Processing Machines, Tool Holders – Cutting Tools, Quality Control – Measurement Systems, CAD/CAM, PLM Software and Manufacturing Technologies Fair*
  - **MAKTEK IZMIR** - *Machine Tools, Metal – Sheet Metal Processing Machines, Tool Holders – Cutting Tools, Quality Control – Measurement Systems, CAD/CAM, PLM Software and Manufacturing Technologies 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

### *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 MAGAZİN – 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.*







## 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
- 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.

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.



**MYK**  
MESLEKİ YETERLİLİK  
KURUMU








STRONG  
UNITY  
REPRESENTING  
THE MACHINE  
TOOLS SECTOR

[www.tiad.org](http://www.tiad.org) 

[info@tiad.org](mailto:info@tiad.org) 

+90 212 565 53 54 Fax: +90 212 501 77 31 

Ismetpasa Mah. Karadeniz Sok. No:1 Kat:2 34040 Bayrampasa - Istanbul / TURKEY 