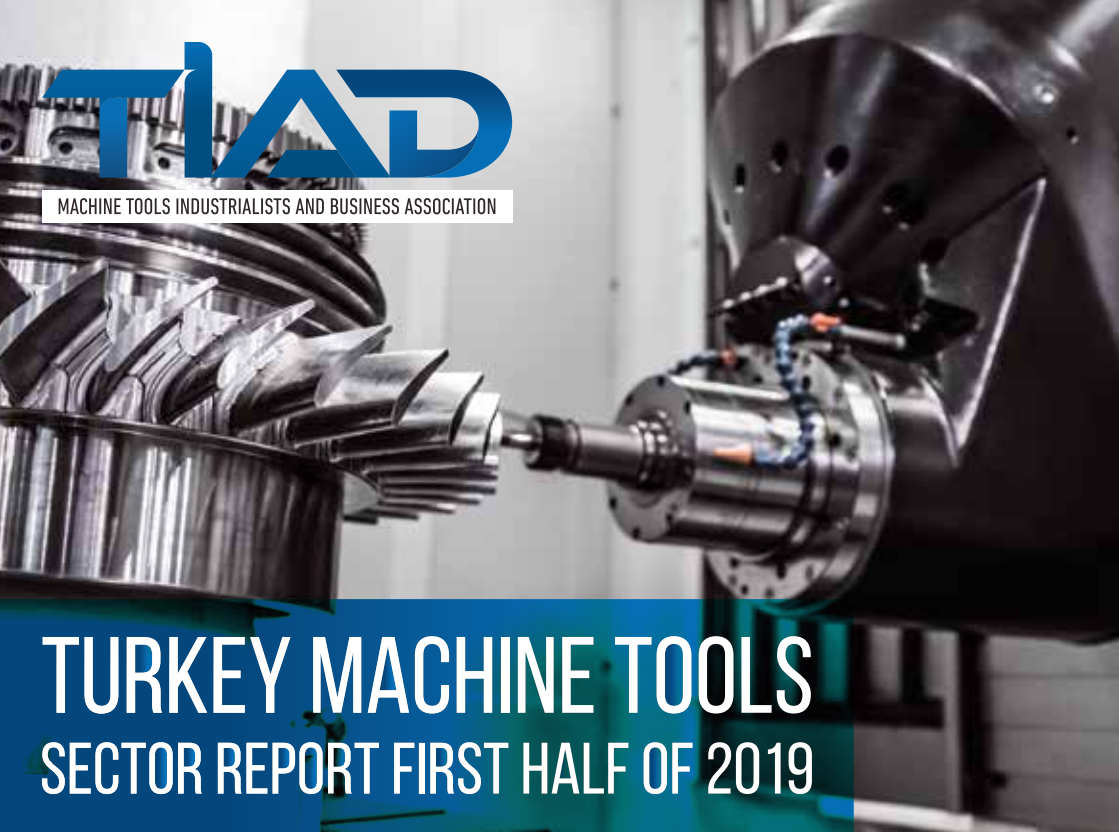




MACHINE TOOLS INDUSTRIALISTS AND BUSINESS ASSOCIATION

A close-up photograph of a precision industrial machine tool, likely a lathe or mill, with a complex metal part being machined. The scene is brightly lit, highlighting the metallic surfaces and the intricate details of the machinery.

TURKEY MACHINE TOOLS SECTOR REPORT FIRST HALF OF 2019



MACHINE TOOLS INDUSTRIALISTS AND BUSINESS ASSOCIATION (TIAD) OF TURKEY

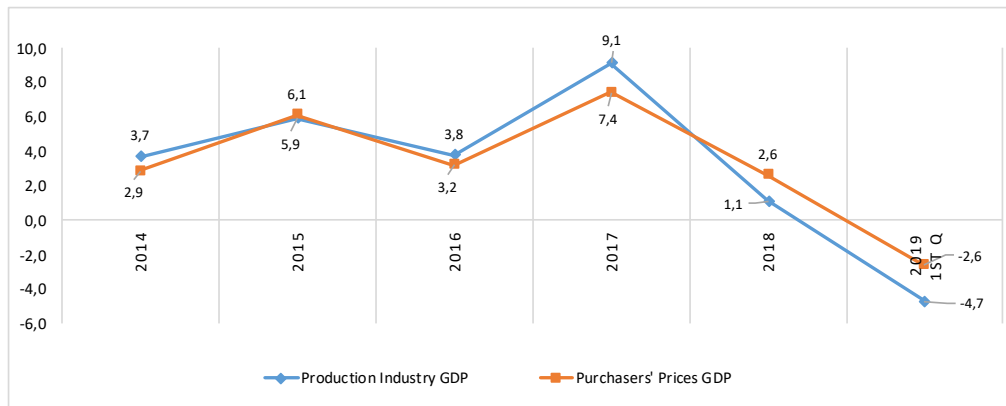
Machine Tools Industrialists and Business Association (TIAD) of Turkey is a professional organization established in 1992 with the aim of gathering industrialists and business people dealing with manufacturing, export, import, wholesale and/or retail trade of machine tools, tooling equipment, engineering software, quality control equipment, their complementary accessories and 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 August 2019, the number of TIAD members has reached **190** and more than 80% of the machine tools and related equipment demand in Turkey is met by TIAD members.*



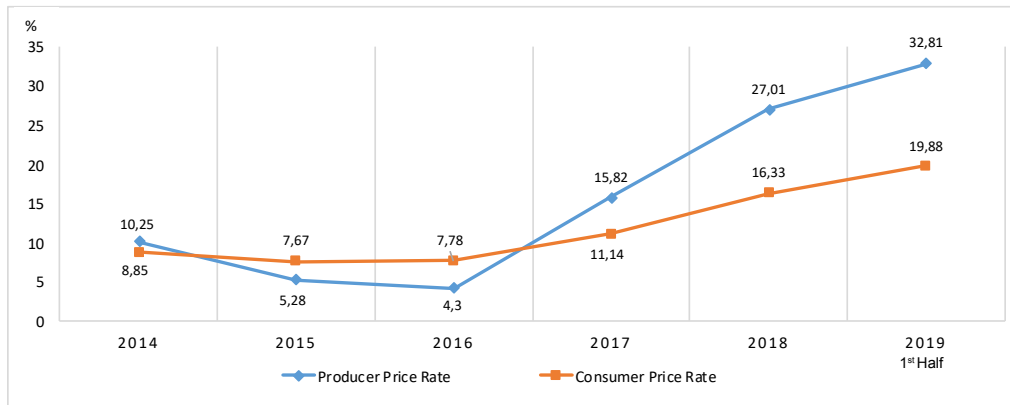
***OVERVIEW OF TURKEY'S GENERAL ECONOMIC SITUATION
&
TURKEY'S MACHINE TOOLS AND RELATED EQUIPMENT GENERAL OUTLOOK***

OVERVIEW OF TURKEY'S GENERAL ECONOMIC SITUATION
TURKEY'S RATE OF GDP (2014 to 2019 1ST QUARTER)



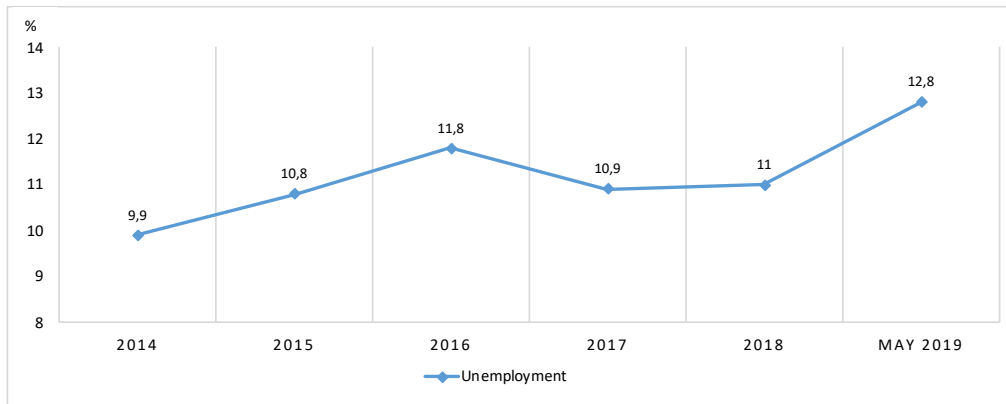
Source: Turkish Statistical Institute

**TURKEY'S RATE OF INFLATION (2014 to 2019 1ST HALF)
(12 MONTHS AVERAGE)**



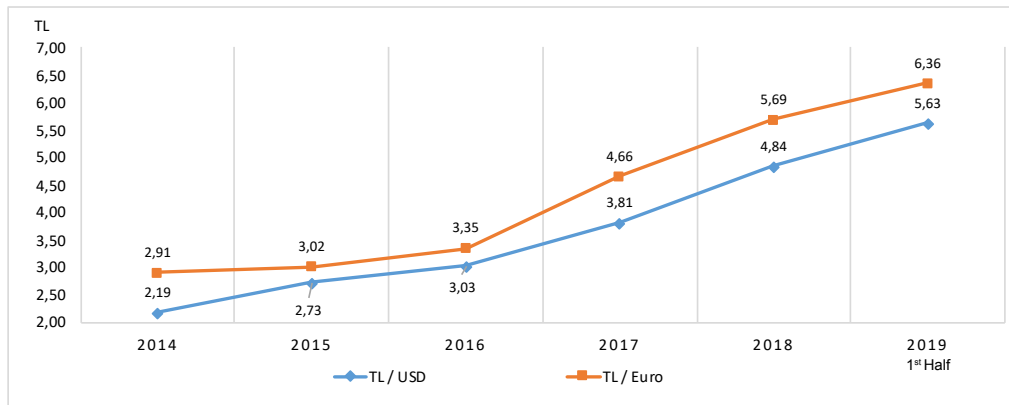
Source: Central Bank of The Republic Of Turkey

TURKEY'S RATE OF UNEMPLOYMENT (2014 to MAY 2019)



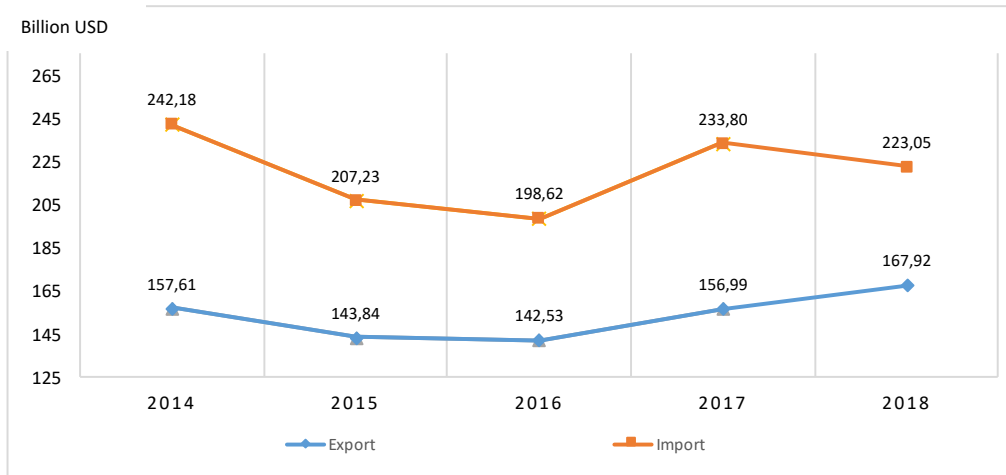
Source: Turkish Statistical Institute

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



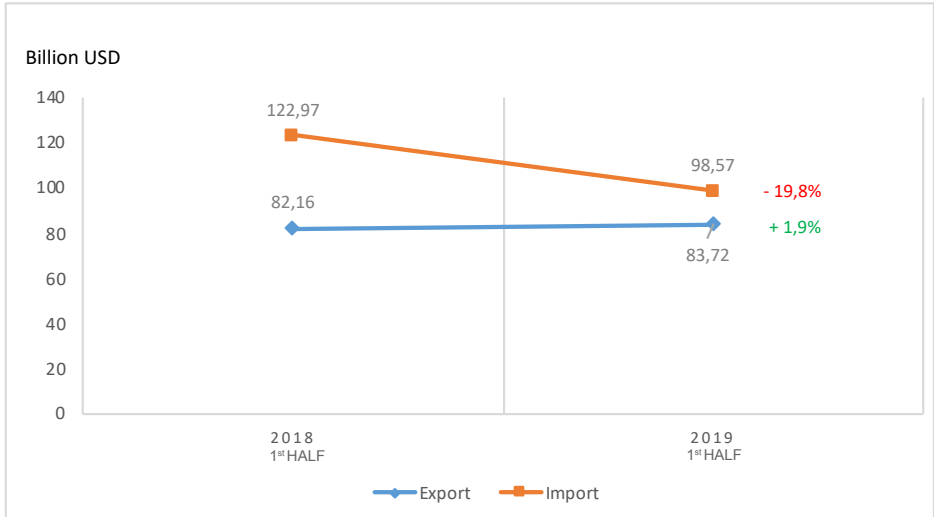
Source: Central Bank of The Republic Of Turkey

TURKEY'S FOREIGN TRADE (2014 to 2018)



Source: Turkish Statistical Institute

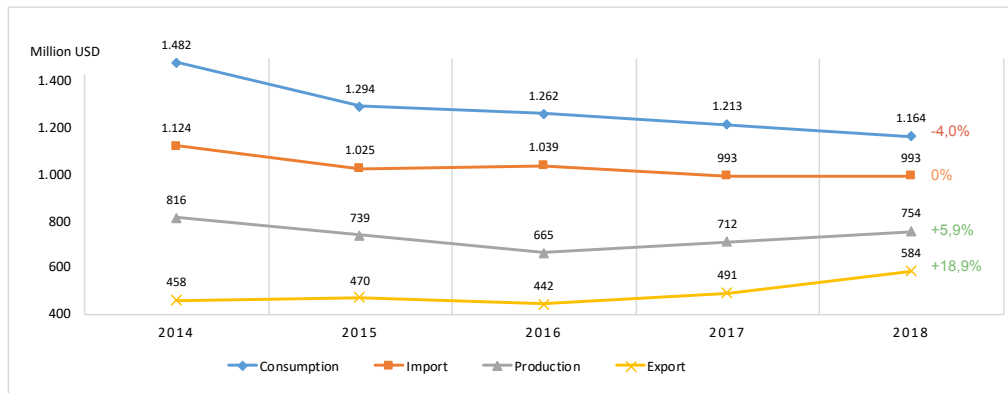
TURKEY'S FOREIGN TRADE (1ST HALF 2018 to 1ST HALF 2019)



Source: Turkish Statistical Institute

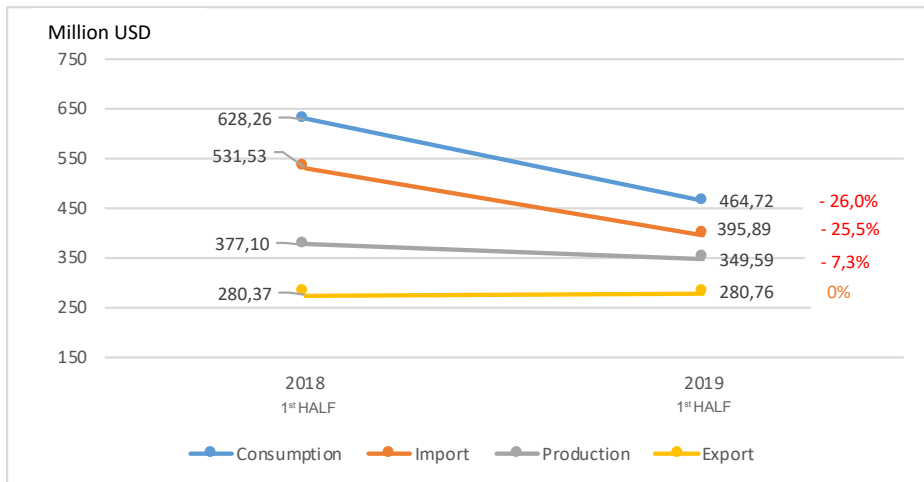
OVERVIEW OF TURKEY MACHINE TOOLS SECTOR

FOREIGN TRADE OF TURKEY'S MACHINE TOOLS SECTOR (2014 to 2018)



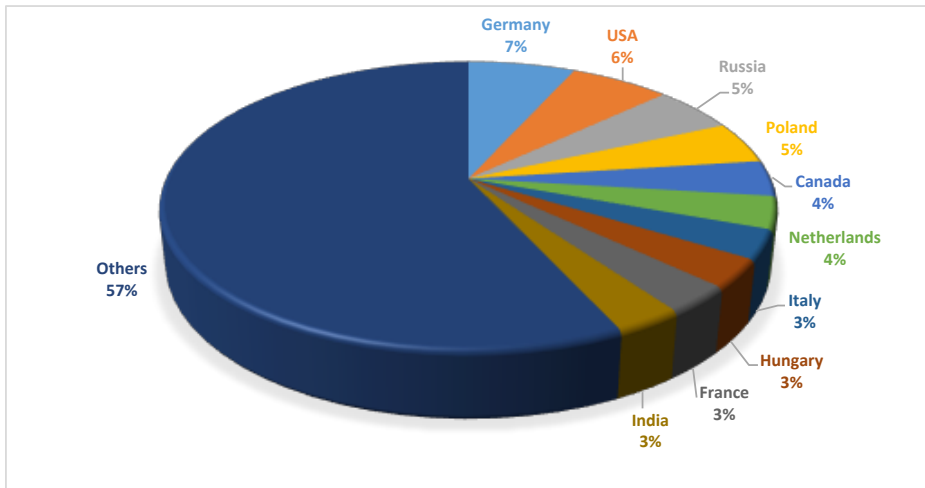
Source: Turkish Statistical Institute

FOREIGN TRADE OF TURKEY'S MACHINE TOOLS SECTOR
(1ST HALF 2018 to 1ST HALF 2019)



Source: Turkish Statistical Institute

**SHARE OF TOP 10 COUNTRIES IN TURKEY'S TOTAL MACHINE TOOLS EXPORT
(2019 1ST HALF)**



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



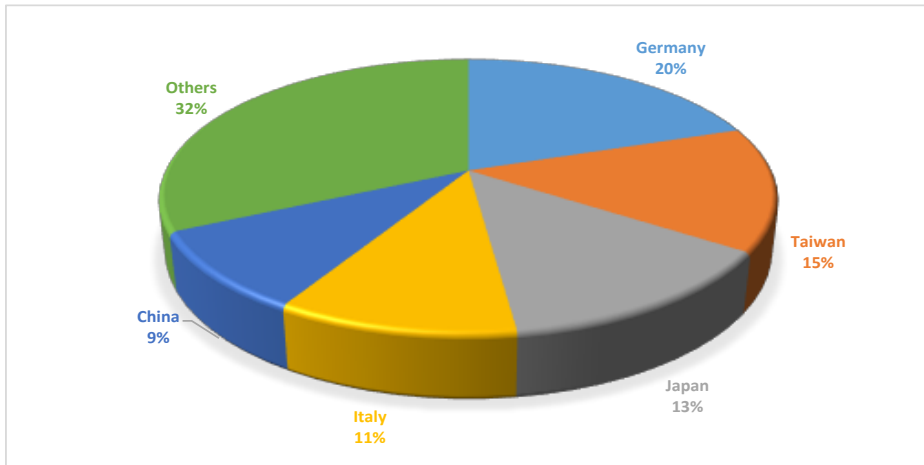
TURKEY'S TOTAL MACHINE TOOLS EXPORT

(1st HALF 2018 to 1st HALF 2019)

	2018 1 ST HALF (USD)	2019 1 ST HALF (USD)	Change Rate (%)
Germany	14.248.729	18.912.545	+ 32,7
USA	14.142.701	17.627.284	+ 24,6
Russia	20.044.604	14.614.993	- 27,1
Poland	14.635.382	13.250.699	- 9,5
Canada	8.362.467	11.277.697	+ 34,9
Netherlands	6.576.823	10.169.661	+ 54,6
Italy	8.013.607	9.089.887	+ 13,4
Hungary	5.337.992	8.860.088	+ 66,0
France	8.596.327	8.716.923	+ 1,4
India	4.859.857	8.490.851	+ 74,7
UK	6.712.332	8.433.295	+ 25,6
Others	168.843.432	151.313.759	- 10,4
Total	280.374.253	280.757.682	0

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

SHARE OF TOP 5 COUNTRIES IN TURKEY'S TOTAL MACHINE TOOLS IMPORT (2019 1ST HALF)



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

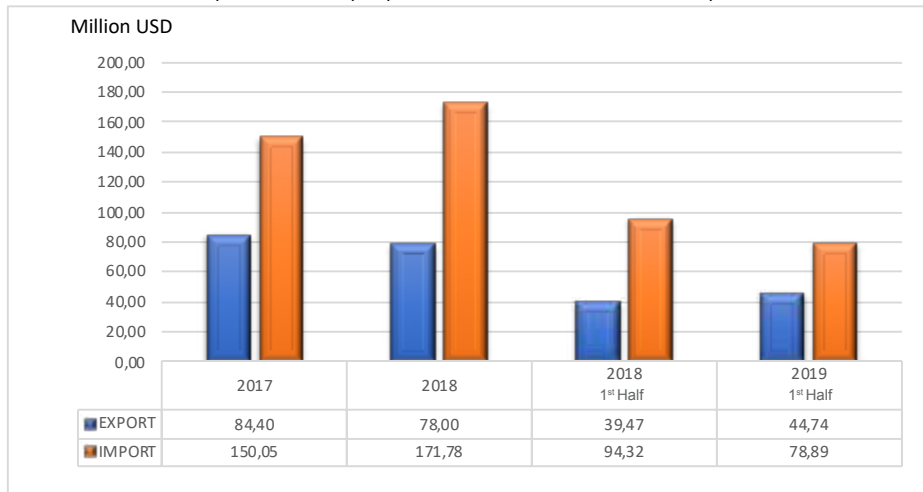


TURKEY'S TOTAL MACHINE TOOLS IMPORT - (1STHALF 2017 to 1ST HALF 2018)

	2018 1ST HALF (USD)	2019 1ST HALF (USD)	Change Rate (%)
Taiwan	105.201.395	58.028.372	- 44,8
Germany	81.610.225	78.157.580	- 4,2
Japan	78.516.547	53.433.747	- 31,9
Italy	74.362.810	42.323.942	- 43,1
S. Korea	52.478.544	27.706.102	- 47,2
China	48.398.699	37.102.603	- 23,3
Switzerland	23.276.199	11.537.682	- 50,4
USA	10.209.982	11.793.559	+ 15,5
Spain	9.427.734	17.444.960	+ 85,0
France	5.484.943	12.220.280	+ 122,8
Others	42.564.511	46.136.479	+ 8,4
Total	531.531.589	395.885.306	- 25,5

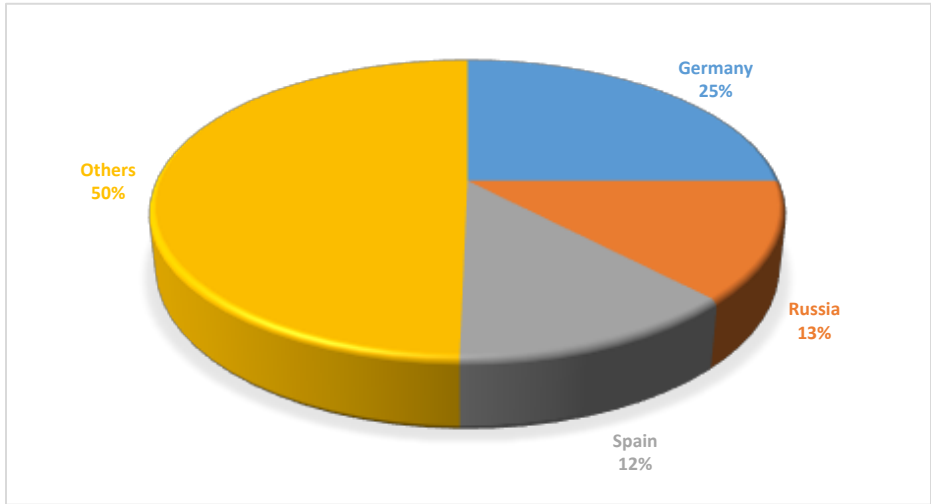
Source: Turkish Statistical Institute (8456, 8457, 8458, 8459, 8460, 8461, 8462, 8463 HS Codes have been included.)

**FOREIGN TRADE OF TURKEY'S CUTTING TOOLS
(2017 to 2018) & (1ST HALF 2018 to 1ST HALF 2019)**



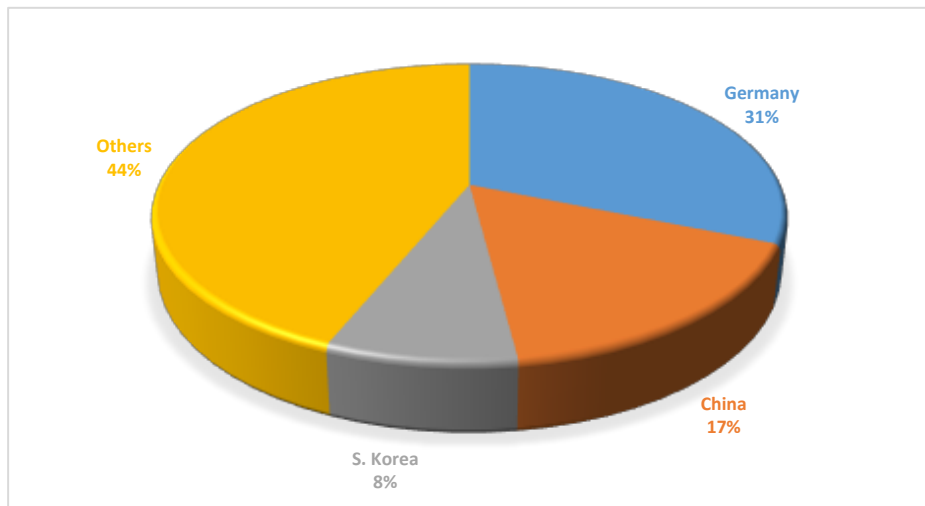
Source: Turkish Statistical Institute

CUTTING TOOLS EXPORT DISTRIBUTION OF TURKEY (2019 1ST HALF)



Source: Turkish Statistical Institute

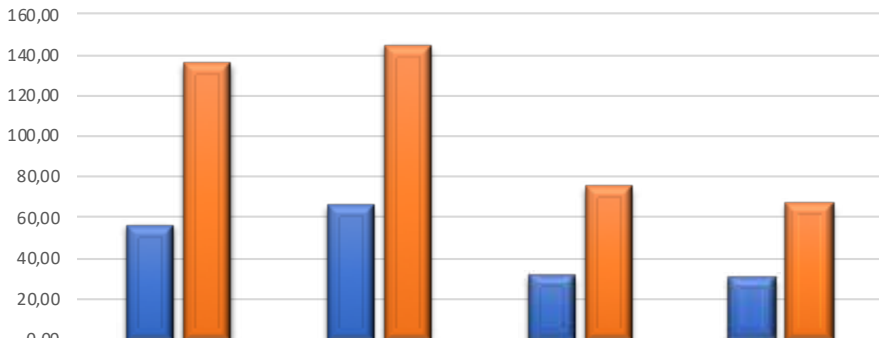
CUTTING TOOLS IMPORT DISTRIBUTION OF TURKEY (2019 1ST HALF)



Source: Turkish Statistical Institute

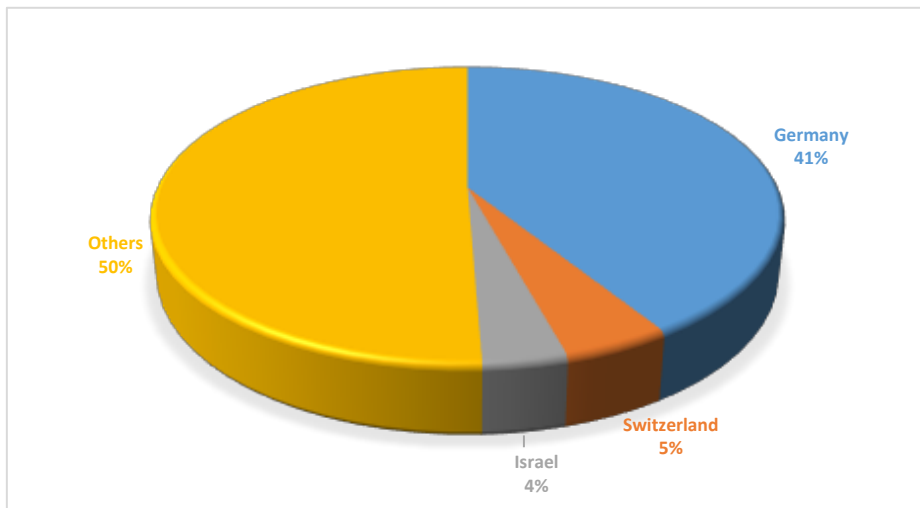
FOREIGN TRADE OF TURKEY'S TOOL HOLDERS
(2017 to 2018) & (1ST HALF 2018 to 1ST HALF 2019)

Million USD

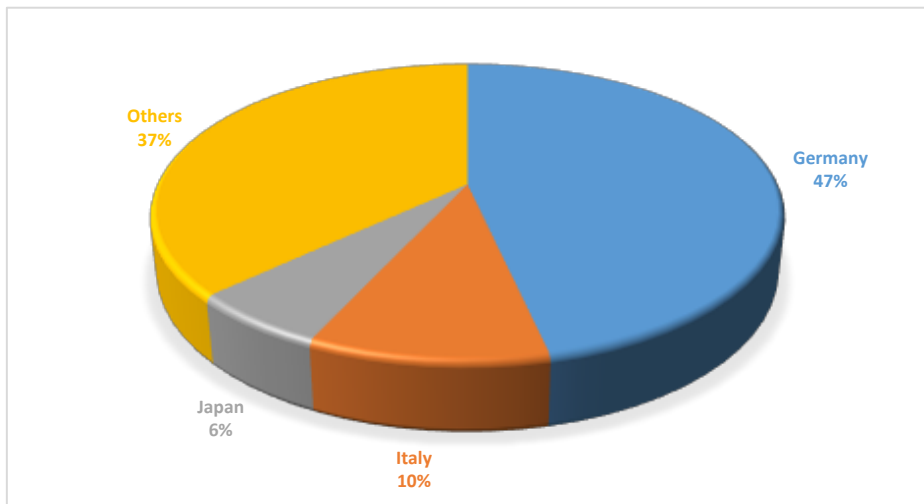


EXPORT	55,71	65,70	30,93	30,04
IMPORT	135,37	144,26	74,84	66,69

TOOL HOLDERS EXPORT DISTRIBUTION OF TURKEY (2019 1ST HALF)

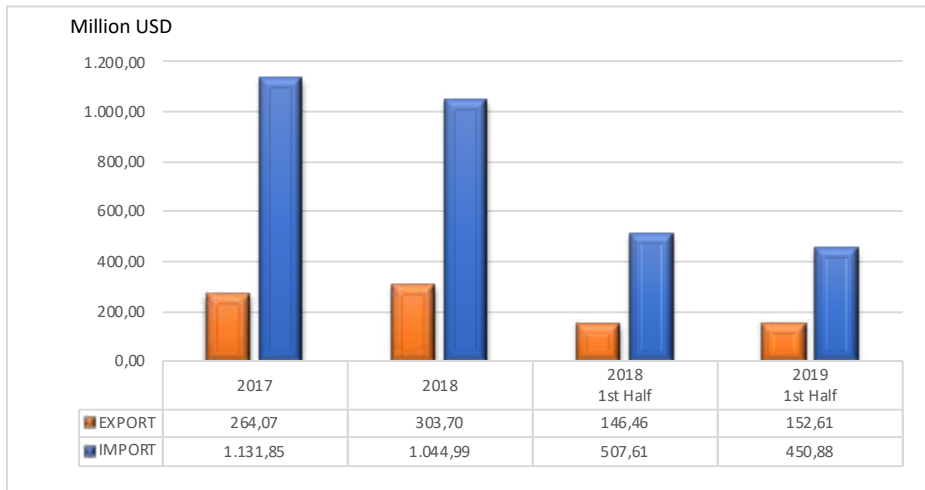


TOOL HOLDERS IMPORT DISTRIBUTION OF TURKEY (2019 1ST HALF)



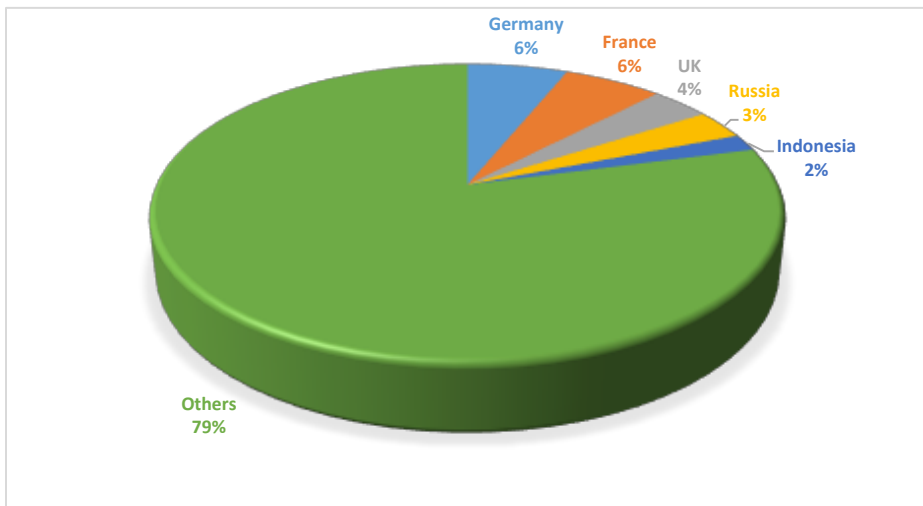
Source: Turkish Statistical Institute

**FOREIGN TRADE OF TURKEY'S MEASUREMENT EQUIPMENTS
(2017 to 2018) & (1ST HALF 2018 to 1ST HALF 2019)**



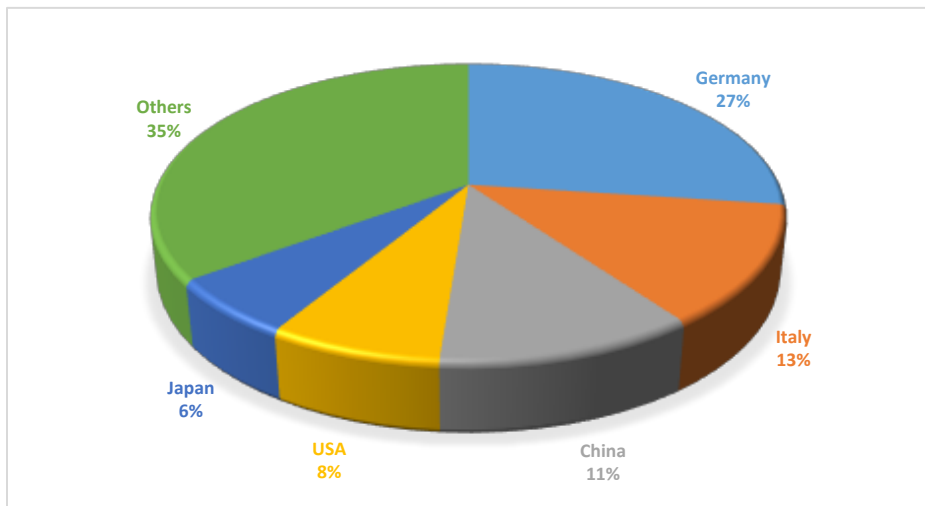
Source: Turkish Statistical Institute

MEASUREMENT EQUIPMENTS EXPORT DISTRIBUTION OF TURKEY (2019 1ST HALF)



Source: Turkish Statistical Institute

MEASUREMENT EQUIPMENTS IMPORT DISTRIBUTION OF TURKEY (2019 1ST HALF)

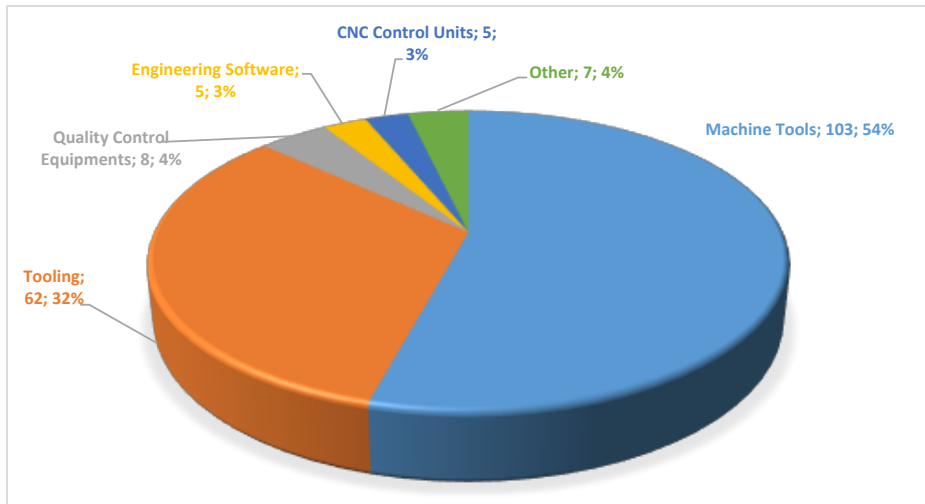


Source: Turkish Statistical Institute





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 Committees and Working Groups.

Committees

- *Fair*
- *Laws and Regulations*
- *Media and Advertising*
- *Training*
- *After Sales Services*

Working Groups

- *Tooling*
- *Metrology*
- *CAD / CAM*
- *Metal Forming Machine*



REPRESENTATION ACTIVITIES

TIAD's major representation activities include

National Area;

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

International Area;

- *Board Member of CELIMO.*



TIAD

REPRESENTATION ACTIVITIES

OUR COOPERATING NATIONAL ASSOCIATIONS





REPRESENTATION ACTIVITIES

OUR COOPERATING INTERNATIONAL ASSOCIATIONS





TIAD ORGANISATIONAL SERVICES ENTERPRISE

TIAD leads organization of comprehensive machine tool fairs in Turkey. Within the scope of this effort;



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Fairs are supported by TIAD.



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.



Germany - Italy



S. Korea



Taiwan



Germany



Germany



Russia



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.





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 Center Operatorship ve Programming
- Computer Aided Design (CAD) / Computer Aided Manufacturing (CAM)
- CNC Control Unit Using
- CNC Fault Detection and Maintenance
- Sales Engineer Certification Programme





TIAD'S ENTERPRISE ACTIVITY

TIAD VOCATIONAL TEST CENTER ENTERPRISE

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 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) and authorization from MYK (Vocational Qualification Authority).

TIAD established the occupational standards and vocational qualifications for

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

in line with European Qualifications Framework (EQF). TIAD MTM, having ISO 9001 and ISO 17024 Standards.



Notes:



MACHINE TOOLS INDUSTRIALISTS AND BUSINESS ASSOCIATION

TURKEY MACHINE TOOLS SECTOR REPORT FIRST HALF OF 2019