

AFTERMARKET

panorama



ALİ ÖZÇETE

A New Era in the Automotive Aftermarket:
Data, Representation, and Transformation

AYTUĞ SAKALLIOĞLU

From Yesterday to Today
OSS Association

EMİRHAN SİLAHTAROĞLU

Türkiye and FIGIEFA on the Agenda
"Made in EU"

Plus much more.....

31 YEARS
WE HAVE BEEN
STRONGER TOGETHER

A New Era in the Automotive Aftermarket: Data, Representation and Transformation

The automotive aftermarket is a strategic ecosystem that plays a vital role in Türkiye's economic sustainability, employment and international competitiveness. Its continued development depends on data-driven decision-making, strong industry representation and policies shaped through collective expertise.

Building on the foundations laid by previous administrations, OSS Association has spent the past three years strengthening its position as the leading voice of Türkiye's automotive aftermarket while expanding its presence and influence internationally.

One of the most significant achievements of our first two years in office was the launch of a landmark market study developed in partnership with Frost & Sullivan. For the first time, the study provides a comprehensive picture of Türkiye's automotive aftermarket, mapping its size, structure, strengths and future growth opportunities.

More than a one-time research initiative, this project has been designed as a long-term industry benchmark. It will continue to evolve through more granular market segmentation and deeper analytical insights, providing reliable data to monitor and understand the sector's ongoing transformation. The next phase, incorporating 2025 market data, will be completed in June 2026.

Increasing Türkiye's international visibility has been another key strategic priority over the past two years. In this context, OSS Association marked a major milestone by organising Türkiye's first-ever national participation at Equip Auto Paris. Looking ahead, we remain committed to expanding Türkiye's national participation at leading international trade fairs and strengthening the global presence of our industry.

Another defining achievement has been our growing engagement with FIGIEFA, the European federation representing the independent automotive aftermarket. Through the Made in EU initiative, we have helped bring Türkiye's perspective onto FIGIEFA's policy agenda, contributing to stronger dialogue and closer cooperation between Türkiye and the European aftermarket community. In this issue, our Secretary General and FIGIEFA Board Member, Mr. Emirhan Silahtaroglu, shares his perspectives on this important subject.

Our contribution to the sector extends well beyond international representation. Through our specialised working groups, we continue to develop practical initiatives aligned with our strategic priorities. The activities of our Balance at Work Working Group, which promotes greater participation of women in the automotive aftermarket, are presented by Ms. Beylem Leblebici Birsen. Meanwhile, Mr. Bumin Kaan Köktürk offers his assessment of the import regulations that entered into force in 2026 on behalf of our Legal Regulations Working Group.

Together, these initiatives reflect our belief that the future of the automotive aftermarket depends on advancing human capital, embracing data-driven decision-making, strengthening international integration and continuously improving the regulatory framework.

Today, the drivers of success in our industry have fundamentally changed. Competitive advantage is no longer determined solely by manufacturing capability or product availability. Increasingly, it is shaped by knowledge, data, innovation and strategic vision.

Our ambition as OSS Association is to help build an internationally recognised, data-driven, inclusive and forward-looking automotive aftermarket that enhances Türkiye's competitiveness on the global stage. I would like to express my sincere gratitude to all our members, stakeholders and working groups whose commitment and contributions continue to make this progress possible.

Respectfully,



Ali Özçete

Chairman of the Board OSS Association

CONTENTS



01

**ALİ
ÖZÇETE**

Chairman of the Board
OSS Association



06

**AYTUĞ
SAKALLIOĞLU**

OSS Former President



**EMİRHAN
SİLAHTAROĞLU**

FIGIEFA & OSS Board
Member



07

**BEYLEM
LEBLEBİCİ BİRSEN**

Member of the Boards
of Directors of OSS and
KAGİDER



09

**ERKİN
ŞAHİNÖZ**

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Founder of Erkin Şahinöz Academy,
Former Research Director at the U.S.
Federal Reserve (the Fed)



10

**BUMİN KAAAN
KÖKTÜRK**

Member of the OSS Legal
Regulations Working
Group & PwC Senior
Subject Matter Expert



12

**FİRUZAN
İŞCAN**

General Manager of
HDI Insurance



**ARDA
ARSLAN**

Bosch Mobility Aftermarket
Solutions Regional Director
Turkey & Middle East



37



39

ANDY HAMILTON

LKQ Europe President and CEO



41



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42



ONUR ÖZYAPICI

MANN+HUMMEL Vice President, Automotive Aftermarket (India, Middle East, Africa and Turkey)

43



EMRE ÖZPEYNİRCİ

Journalist and Industry Analyst

45



MICHAEL JOHANNES

Messe Frankfurt Vice President Mobility & Logistics and Brand Manager, Automechanika

47



ÖZARSLAN A. TANGÜN

CEO of Enterprise Turkey



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Özçete
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OSS Shapes the Industry Through Working Groups

Working groups aimed at strengthening a culture of shared knowledge and coordination in the automotive aftermarket are central to the association's activities. These bodies, created across different areas of expertise, play a critical role in implementing sustainable, value-adding projects that contribute to the sector's development.

The working groups operate around common goals such as building a strong organizational culture, acting in line with the association's mission and vision, developing projects that make an impact on national and international platforms, and raising awareness within the industry. Meeting at regular intervals, the groups also form an effective, continuous working platform that produces fast, collective responses to the sector's needs.

The Member Relations and Events Working Group, led by management representatives Fatih Odabaşlar and Müjdat Aras, works on a wide range of activities from recruiting new members to organizing events. In addition to efforts that strengthen the association's promotion, regular data collection from member companies contributes to industry analyses.

The Balance at Work Working Group, coordinated by management representatives Beylem Leblebici Birsen and Vecibe Kaplan Arslan, focuses on increasing women's employment in the sector, developing a qualified workforce, and improving training processes. University collaborations and publicly supported projects aim to strengthen human resources.

Under the leadership of Chairman Vahap Tan, the Digital Tachograph Working Group seeks to strengthen the sector's representation through regulatory monitoring in the digital tachograph field, public information activities, and contacts with public authorities.

The Brand Protection Working Group, with management representatives Cemal Çobanoğlu and Emirhan Silahtaroğlu, takes on an important mission in combating counterfeit products in the automotive spare parts sector. Within this scope, it carries out cooperation and awareness-raising activities among industry stakeholders.

The Legal Regulations Working Group, managed by Emirhan Silahtaroğlu and Beylem Leblebici Birsen, helps ensure the sector's needs are properly conveyed through monitoring and improving relevant legislation and through consultations with public authorities.

The Mobility, Technology and Sustainability Working Group, led by management representatives Mehmet Karakoç and Ufuk Çilek, works on adapting to changing automotive dynamics, sustainability-focused transformation, and integrating technological developments into the sector. Electric vehicles, innovation, and knowledge sharing are among this group's priority topics.

The Business Development Working Group, coordinated by management representative Vecibe Kaplan Arslan, focuses on developing strategies that will contribute to the sector's growth. Creating new business opportunities, increasing national and international partnerships, and promoting digitization-focused processes form the core of its work.

Together, these working groups create synergy under the association's umbrella and make a multifaceted contribution to the development of the automotive aftermarket. Led by their management representatives, this structure strengthens the sector today while shaping its future.

Aytuğ SAKALLIOĞLU
OSS Former President



From Yesterday to Today OSS Association

The journey of the OSS Association from its founding to the present has been shaped by sacrifice, institutional continuity, and a vision of creating value for the sector, standing out as an organization that draws strength from the past while guiding the future.

Leaders of our automotive industry's original equipment manufacturers, valued representatives of our aftermarket sector, dear friends,

I was truly honoured. I am that our General Coordinator Mr. Orçun contacted me the association will be publishing a magazine at regular intervals and that the board would like me to write a foreword for the first issue.

Our association, founded by dear friends in 1995, has been very close to my heart. From its early years I served on the board at various times and between 2000 and 2005 I had the privilege of serving as its president. I am both proud of the position the association holds today and deeply gratified to see that the patience and effort we, as its managers at the time, invested to keep it alive were not in vain.

As I write this, memories come to mind – attending FIGIEFA general assemblies without fail to represent our association alongside my dear friend Hayri Kaya, efforts to prevent our group from losing its very important FIGIEFA membership, and asking our friend Erol Arslan, with a playful nudge ("you'll convince Ms. Sylvia"), to travel to Belgium to secure a special reduction in the steep annual FIGIEFA dues that at the time felt like a heavy burden for our small association. Those moments bring a fond smile to my face.

Alongside that, I recall presentations we made on behalf of the association: with my respected elder and former president Lütfi Ensari at AAPEX 2000 in Las Vegas, and at SEMA/MEMA, delivering a talk titled "Automotive in Turkey – Potential and Opportunities." I also remember, with Lütfi Bey's contributions and the participation of then-FIGIEFA President Mr. Hartmut Röhl as our guest, the presentation we gave at Automechanika Istanbul 2003 about the then-unknown "Block Exemption Regulation," which led to continuing "Aftermarket" conferences that now attract hundreds of attendees and have become traditional events.

Dear friends, we who believed strongly in the importance of this association for our sector bore every financial and moral sacrifice required in those early days to bring the association to where it is today. We adopted a seldom-seen approach for an NGO: in order to preserve the association's culture and history, each former president would serve as vice president under the new president. Hayri Kaya and I carried this principle forward for many years. We worked toward a single goal: to protect the association's values, preserve its institutional structure, and, when the time came, hand over the association's leadership – gradually reducing the dominance of manufacturers and properly transferring responsibility to the actors of the aftermarket.

Finally, under the presidency of my dear colleague Mesut Urgancılar, and thanks to his and his team's determined efforts, we took steady steps toward that aim. As a result of these efforts, I am pleased that in recent terms the boards have been composed largely of representatives from leading aftermarket companies that have completed their institutionalization processes successfully. I am also proud and appreciative that our association can now provide a member to FIGIEFA's board. My advice to current and future boards is to never lose this influence.

At FIGIEFA meetings I attended in the past, I witnessed FIGIEFA presidents frequently engaging in lobbying with members of the European Parliament. In that context, I believe it is very important for our country's interests in processes such as EU and Customs Union relations that OSS carry out lobbying through FIGIEFA, and I urge our boards to keep this matter on their agendas.

In closing, I wish many more successful years to our association, which continues to grow and to illuminate our sector with its hundreds of members. I hope this magazine's first issue, for which I have had the honor of writing this foreword, will contribute positively to our unity and solidarity. I send my respect and affection to all the managers and friends whose efforts helped bring the association to where it is today – many of whom I could not name individually in this piece.



With a legacy of unity and vision, the OSS Association continues to grow.



Emirhan SİLAHTAROĞLU
FIGIEFA & OSS Board Member

Turkey and FIGIEFA on the Agenda “Made in EU”

The “Made in Europe” approach, which has been frequently discussed in the European Union recently, carries a meaning that goes beyond a technical regulation. This topic points to a comprehensive transformation with the potential to directly affect a wide ecosystem ranging from automotive original equipment manufacturers to the aftermarket.



The “Made in EU” approach, which has been frequently discussed in the European Union recently, signifies more than a technical regulation. It points to a comprehensive transformation with the potential to directly affect a wide ecosystem stretching from automotive OEMs to the aftermarket. The weakening of the competitiveness of the European automotive industry in recent years, the decline in suppliers’ profitability and the announcement that more than 100,000 jobs could be lost in 2024–2025 are among the main reasons these policies have emerged.

“Made in EU” refers to an industrial policy approach aimed at strengthening production within Europe’s borders in strategic sectors. Rather than being an official product label, it is a framework that envisages giving greater weight to production carried out in Europe through public procurement, incentive mechanisms and investment policies. The primary goals are to reduce dependence on external sources in critical areas, increase competitiveness and strengthen the long-term resilience of European industry.

In the automotive sector, priorities include reinforcing the electric vehicle ecosystem, expanding battery production and recycling capacity, securing supply of critical raw materials, and increasing semiconductor production in Europe. In addition, the gradual tightening of emissions standards, carbon regulations, establishing technical frameworks for connected and software-based vehicle technologies, and recycling rules focused on the circular economy form key components of the transformation. All these measures are shaped by the aim of making the European automotive ecosystem more sustainable, more technological and more resilient.

An Important Step for Turkey’s Integration

Although it has been known for some time that the EU was preparing such a regulation, after the first draft was published a period of concern naturally followed in many sectors closely linked with Europe, above all Turkey’s automotive supplier industry, due to the uncertainty it created.

During this period, OSS conducted intensive contacts and consultations both domestically and at the European level. In particular, in discussions we held in Ankara with the Republic of Turkey Ministry of Trade — chiefly the General Directorate of Exports and the General Directorate for International Agreements and the EU — and other relevant public institutions, we had the opportunity to assess the potential impacts of the new industrial policies developing in the European Union on our sector and to convey the aftermarket perspective directly. These contacts also provided a comprehensive basis for public bodies to evaluate Turkey’s automotive supplier and aftermarket sectors’ position in the European value chain, production capacity and international competitiveness.

In addition, through European industry platforms such as FIGIEFA, where we have long been active members and hold a seat on the board, and through our contacts at the European Public and Sectoral Organizations, we continued to present Turkey’s production infrastructure and our sector’s role in the European automotive ecosystem on international platforms. The developments connected to the “Made in EU” agenda began to be examined more visibly in terms of their potential effects on Turkey’s automotive aftermarket during this process. As OSS, guided entirely by the common interests of our sector, we have closely followed these developments with a proactive approach and continued to share our views and assessments with relevant stakeholders.



*The Contacts Conducted
Through FIGIEFA Make
the Position of the
Turkish Aftermarket
Industry in Europe Even
More Critical During the
“Made in EU” Process.*





The new industrial policy shaped by a “Made in EU” approach in the coming period, if evaluated correctly, presents significant opportunities for the Turkish automotive supplier industry.

At the end of the process, the Industrial Accelerator Act (IAA) proposal that the European Union presented on March 4, 2026 clarifies many open questions while also setting out the EU’s objective to strengthen strategic sectors—particularly energy-intensive industries, net-zero technologies and automotive manufacturing capacity—along with their competitiveness and supply-chain security. To summarize clearly what this draft law means for Turkey and for the Turkish automotive supplier/aftermarket sector: it represents both a very large opportunity and a requirement for substantial transformation.

One of the most critical provisions in the draft is the “Union origin” condition to be required in public procurement and public support programs. Under Articles 8 and 9 of the draft, content originating in third countries that have a customs union or free trade agreement with the EU may, under certain conditions, be treated as “Union origin.”

Because Turkey has a Customs Union with the European Union, products manufactured by the Turkish automotive supplier sector could be regarded as EU-origin content under this framework. This development could place Turkish manufacturers at a significant advantage compared with competitors in countries that do not have such an agreement with the EU.

Considering regulatory alignment, production infrastructure and trade volume, Turkey is already an important part of the European automotive ecosystem. Therefore, the possibility of treating production from Customs Union partners as Union-origin content is seen as an important step toward recognizing Turkey’s production capacity and its industrial integration with Europe in practice.

Transformation imperatives and risks facing the sector

However, the scope and implementation details of the regulation also include several important topics that need to be monitored closely from the sector’s perspective. For example, the European

Commission reserves the right to partially or fully withdraw a country’s — even a Customs Union partner’s — ability to be considered “EU origin” through delegated measures if developments arise that threaten supply security or if the third country does not treat EU products on its market in a fair or non-discriminatory manner.

Being exempt from quotas thanks to the Customs Union is an important advantage for the Turkish supplier industry, but the low-carbon requirements introduced by the regulation pose a serious test for the sector.

Use of low-carbon materials:

At least 25% of the total volume of steel used in the automotive sector must be low-carbon. Similarly, at least 25% of the aluminum used in automotive applications must be both low-carbon and of Union origin.

Declining share of traditional parts in value:

The draft law notes that the automotive value chain is transforming and that the value share of batteries, electric powertrains and electronic systems in vehicles is steadily increasing. This could bring a medium-term risk of market contraction for some suppliers focused solely on internal combustion engine technologies.

Certification obligations:

Suppliers will need to demonstrate compliance with “Made in EU” and low-carbon requirements through self-declarations or equivalent documentation. Calculating emissions data and having it verified by authorized bodies will become mandatory.

In short, this regulation is a strategic move to restructure Europe’s automotive supply chain and reduce dependence on certain external actors. Thanks to its Customs Union status, Turkey is not outside this new industrial architecture but part of it.



If the Turkish automotive supplier industry can adapt to technological transformation (electric vehicle components) and the green transition (low-carbon production), strengthening its position in the European market and substantially increasing exports is a realistic prospect.

Turkey integrated into a European industrial ecosystem

Turkey’s strong production infrastructure, high export capacity and flexible supply base are not merely an alternative for the European automotive ecosystem but a complementary strength. The production integration that has developed over years within the framework of the Customs Union has made Turkey a natural and strategic part of the European industrial value chain.

The new industrial policy shaped by the “Made in EU” approach offers significant opportunities for the Turkish automotive supplier industry if it is read correctly. But for those opportunities to turn into lasting competitive advantages will depend on swift and decisive steps toward the green transition, low-carbon production and new-generation automotive technologies.

As OSS, we will continue to follow this process closely through ongoing dialogue with our domestic stakeholders in Turkey. Our aim is to help shape a balanced approach that preserves Turkey’s strong position in the European automotive value chain, respects the realities of production, and strengthens reciprocal industrial integration.



Beylem LEBLEBİCİ BİRSEN
Member of the Boards of Directors of
OSS and KAGİDER

The Power of Women in the Automotive Industry: **Change at the Wheel**

For many years the automotive industry was seen as a male-dominated field, but today that picture is changing fast. I am proud to be one of the pioneers of that change. Since 2004 I have been actively involved in the automotive parts supply sector and I am the third-generation manager of our family company, Lepar Automotive. I also serve on the boards of Turkish Automotive Aftermarket Association and the Women Entrepreneurs Association, where I lead projects to help women play a stronger role in working life, and particularly in the automotive aftermarket.

Today we no longer talk about the auto industry only in terms of engine power, production capacity or export figures. We also talk about leadership, corporate culture and diversity. One of the most striking global examples is General Motors CEO Mary Barra. Her leadership is more than a title; it proves that cultural transformation is possible in a long-established industry like automotive. Her example has always made me think: this sector does not resist change — it can transform when the time is right.

A similar transformation is under way in Turkey. At strong brands like Ford Otosan and Peugeot, women leaders no longer hold merely symbolic roles; they take part in strategic decision-making and help steer the industry. Of course there is still work to be done. The share of women in production and technical roles is not yet where we want it to be. But I can say clearly that the influence of women professionals is growing every day across many areas — from engineering and R&D to quality management and aftermarket operations.

Diversity in the Aftermarket

The automotive aftermarket is an end-to-end organization that spans production to procurement, warehouse management to supplier performance, returns and warranty processes to complaint handling. Every link in this chain requires coordination, discipline and great attention to detail.

Research shows that more diverse management teams improve company per-

formance. Different perspectives enhance problem-solving capacity, accelerate innovation, and provide a major advantage in the aftermarket, where quick decisions are often needed. Frankly, I have often witnessed higher process quality in more diverse teams. In areas where women are strong — tracking, detailed management and coordination — small issues are spotted earlier. That reduces repetitive work and operational losses and, as a result, increases customer satisfaction. As the number of women rises, it's not just a matter of numbers; the standard of the work rises too.

Women Taking the Wheel:

İŞ'TE BALANS

The aftermarket begins long after a vehicle is purchased. Spare parts involve a large, dynamic ecosystem made up of manufacturers, distributors and service networks. Although this area has long been known for a workforce dominated by men, the situation is changing.

One important step in this change is the "İŞ'TE BALANS" project launched by Turkish Automotive Aftermarket Association. Balans means the balance of a vehicle. With this project we aim to strengthen that balance. Our goals are to increase women's employment in the automotive aftermarket, to help young women get to know the sector more closely, and to show that there are strong and sustainable career opportunities in this field.

As part of this we launched:

A mentorship program that pairs young women who want a career in the sector with experienced professionals. These pairings gave young women the chance to learn about the industry and career opportunities directly from experts' experiences.

Trainings, webinars and university events. Young women met industry professionals on various platforms and had the opportunity to get to know the sector more closely.

Visibility for role models at fairs and panels, which increased women leaders' presence on stage. As visibility rose, the perception that these careers are attainable grew stronger.



"Balance means the vehicle's stability. With this project, our goal is to strengthen that very balance."

When a young woman sees a manager or engineer like herself as a role model and says "I can do this too," that moment turns a dream into a goal, and a goal into a strong career path.

Thanks to the One Day in the Future program, participants experienced every stage of the job on site — from the office to the production line, from distribution to management. By turning theory into practice, they took concrete steps toward becoming the professionals of tomorrow.

The Aftermarket Ecosystem of the Future

The spread of electric vehicles, digital service infrastructures, data-driven customer management and mobility solutions are redefining the aftermarket. In this transformation, female professionals who are tech-savvy and think analytically will shape the industry's future.

The measures taken under the leadership of Turkish Automotive Aftermarket Association and with contributions from the İŞ'TE BALANS Working Group are not a temporary awareness campaign; they are creating a lasting cultural change in the sector.

The wheel is now being held more steadily. The vehicle's balance is improving. The future of the automotive aftermarket will move forward even stronger with women's knowledge, experience and leadership.



Bumin Kaan KÖKTÜRK

Member of the OSS Legal Regulations Working Group & PWC Senior Subject Matter Expert

Product Safety Inspections and Exemptions in Automotive Parts Imports

UGD Notices are prepared not by product or sector but by "technical regulation," and the scope clause of each Notice specifies which regulation will be used to inspect the products whose Customs Tariff Statistical Position (CTSP) codes are listed in the Notice's annex. Products to be inspected according to Turkish Standards are subject to the Import Compliance with Standards Notice № UGD 2026/1; products to be inspected according to United Nations Economic Commission for Europe (UN/ECE) regulations are subject to the Import Inspection of Vehicle Parts Notice № UGD 2026/25; and products to be inspected under the LVD and EMC Directives are subject to the Import Inspection of Certain Products Requiring a CE Mark Notice № UGD 2026/9.

Multilayer Quality Management and Audit Structure in Vehicle Components

Tires, windows, lighting components, horns, child seats, brake pads and seat belts fall under Notification 2026/25 on the Import Inspection of Vehicle Parts with respect to conformity to UN/ECE Regulations. Although vehicle parts are largely covered by Notification 2026/25, because of the large number of inputs and products in the sector other technical inspection notifications — primarily Notification 2026/1 — also include vehicle parts or inputs used in the automotive industry. For example, although wheels, shock absorbers and traction chains are vehicle parts, they are inspected under Notification 2026/1 according to standards because there are no UN/ECE Regulations for those products. Widely used automotive items such as piston rings, bearings and bolts are also subject to inspection under Notification 2026/1.





The conveniences and exemptions provided to the automotive sector, and especially to major manufacturers, in foreign trade legislation are not limited to this. Since 1985, when TSE began carrying out standards inspections on imports, facilitations have been granted for import inspections of automotive main manufacturers.

Exemptions Granted to the Automotive Main Industry under Market Surveillance and Product Safety (ÜGD) Regulations and Their Historical Development

The facilitations and exemptions granted to the automotive sector, particularly to original equipment manufacturers (OEMs), within the framework of Market Surveillance and Product Safety (ÜGD) regulations are not limited to those currently in force. Since the Turkish Standards Institution (TSE) began conducting standards conformity inspections on imports in 1985, various procedural facilitations have been provided to the automotive main industry during import inspections.

These exemptions became more widespread starting in 1995, when import conformity inspections began to be coordinated by the former Undersecretariat for Foreign Trade. Initially implemented through administrative instructions and later incorporated into legislation, these exemptions have evolved into a permanent component of the regulatory framework.

The exemption of manufacturers holding a Type Approval Certificate, their suppliers, and manufacturers holding an AQAP Certificate from import conformity inspections was introduced in the mid-1990s. The rationale behind this policy included factors such as the automotive industry's established quality control systems, the prevalence of just-in-time production practices,

and the risk that delays arising from customs-stage inspections could disrupt manufacturing operations.

These exemptions continue to be applied today under the scope of the Communiqué on Import Inspections for Compliance with Standards (№ 2026/1).

Furthermore, considering that products imported by manufacturers as production inputs are not always final products and that such components are subsequently assessed within the conformity evaluation process of the finished product, a Production Input Exemption has been introduced for products covered by the Market Surveillance and Product Safety Communiqués № 2026/9, № 2026/25, and № 2026/32, which regulate TSE inspections of products subject to CE or E marking requirements.

Applications for the Production Input Exemption are submitted electronically on an annual basis to the Ministry of Industry and Technology.



The exemption of manufacturers holding a Type Approval Certificate, their suppliers, and manufacturers holding an AQAP Certificate from conformity inspections was introduced in the mid-1990s. This policy was based on several considerations, including the automotive main industry's established and sector-specific quality control systems, the widespread adoption of just-in-time production practices, and the potential for delays arising from customs-stage inspections to disrupt manufacturing operations.



The Global Economy: 2025 Performance and 2026 Outlook (Perception vs. Reality)

Erkin ŞAHİNÖZ
Strategic Management Consultant, Founder of Erkin Şahinöz Academy, Former Research Director at the U.S. Federal Reserve (the Fed)



One of the leading figures in the American advertising industry, Fred Barnard, published an advertisement in the magazine Printer's Ink in 1921 and used the phrase "One look is worth a thousand words" to emphasize the importance of visual communication. The phrase subsequently became widespread. Today, we commonly say, "A picture is worth a thousand words."

When we want to describe the year 2025 with a single image, we use the one below. Take a look at the Global Uncertainty Index, which covers a period of approximately 40 years. The spikes you see in previous years (before 2020) would once have been called crises. As can be seen in the chart, the first major disruption in the global economy occurred in 2020 with the COVID-19 pandemic, while the second took place in 2025 with the beginning of the second Trump administration, during which the United States started to alter policies that had

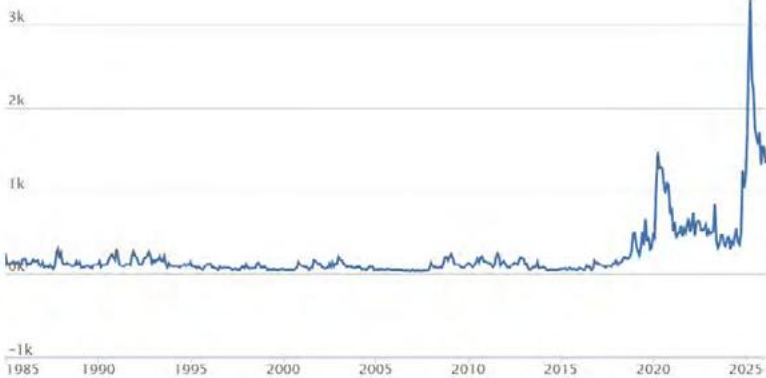
been in place for nearly 80 years. Although the level of uncertainty has eased somewhat recently, it remains near the highest levels in modern history.

It is worth noting that the chart we are examining is an "uncertainty" index, not a "risk" index. Risk and uncertainty are different concepts. Risk refers to "known unknowns." Therefore, risks can be modeled, insured against, and even incorporated into the selling price of a product as a cost item through the calculation of insurance premiums. Uncertainty, on the other hand, corresponds to the "unknown unknowns" discussed by Nassim Nicholas Taleb in his book The Black Swan. The probabilities of uncertainties are extremely difficult to calculate. Uncertainty can make people ill, devastate companies, and place countries in difficult situations. While uncertainty negatively affects many areas, it tends to support a few investment instruments, primarily precious metals such as gold and silver.

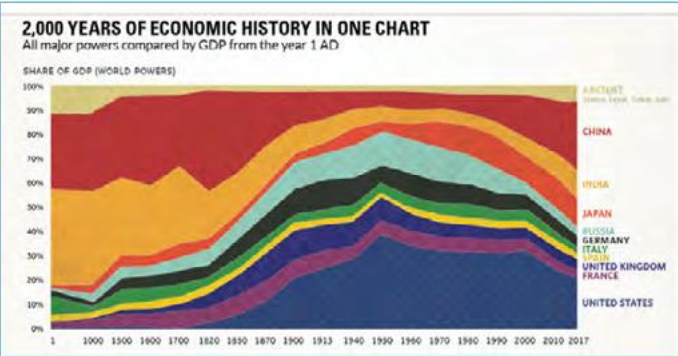
As a result, 2025 became the year of precious metals. During 2025, silver gained 136%, platinum 147%, palladium 76%, and gold 64%. Given that uncertainty remains historically high, it can be argued that the primary trend in precious metals will continue to be upward in 2026 as well, albeit with significant interim corrections.

We need to understand very clearly the main source of this uncertainty. In the accompanying chart, you can see 2,000 years of economic history. I would like you to focus on the change in China's share of the global economy and its recent acceleration. In the early 2000s, China was known as the world's workshop. Today, however, it has caught up closely with the United States in artificial intelligence, AI-driven industrial production (Industry 5.0), technological growth, and the competition for talent. The electricity consumption associated with artificial intelligence is increasing at an extraordinary pace, and economies seeking dominance in this field—particularly China and the United States—must build substantial power-generation capacity. China has also achieved very rapid growth in this area and continues to widen the gap between itself and the United States.

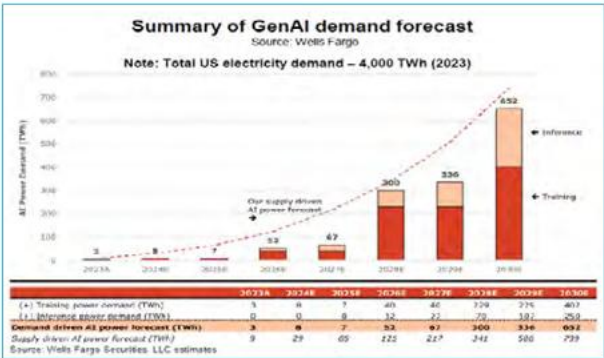
WORLD UNCERTAINTY INDEX



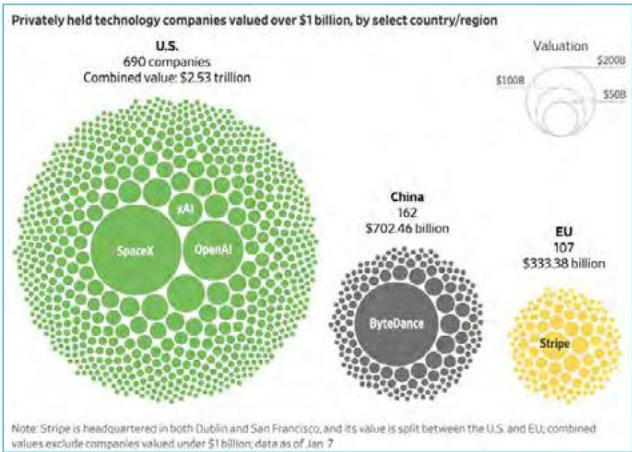
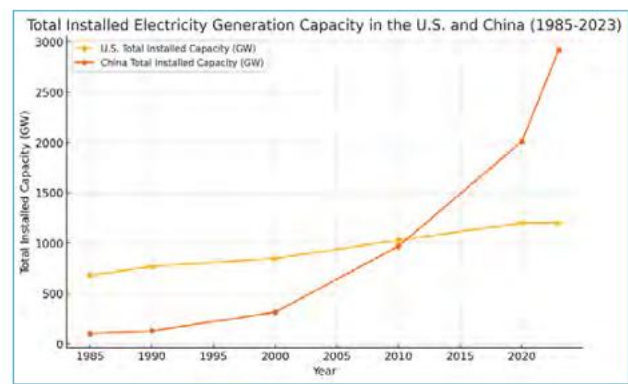
2,000 YEARS OF ECONOMIC HISTORY – THE SHARE OF DOMINANT NATIONS IN THE GLOBAL ECONOMY



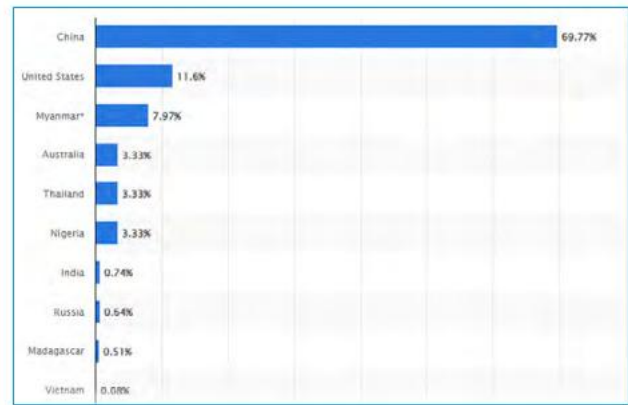
AI-DRIVEN ELECTRICITY DEMAND



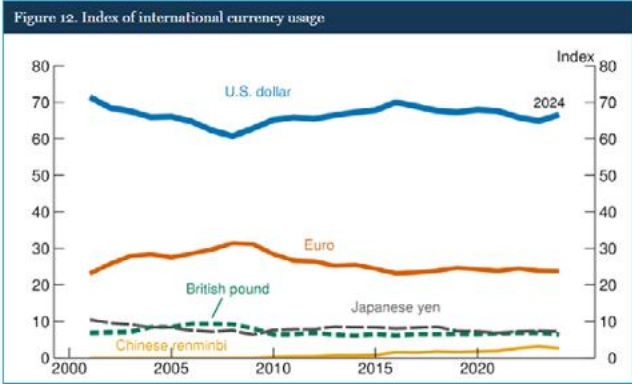
ELECTRICITY GENERATION CAPACITY (CHINA AND THE UNITED STATES)



COUNTRIES' SHARE IN THE PRODUCTION AND PROCESSING OF RARE EARTH ELEMENTS (%)



THE DOLLAR'S SHARE IN THE GLOBAL ECONOMY



“As global uncertainty deepens amid the strategic rivalry between China and the United States, accommodative financial conditions continue to support growth. At the same time, precious metals are maintaining their upward momentum, and expectations for a broad-based global economic expansion in 2026 are strengthening.”

We continue to focus on the reasons why uncertainty is so high and likely to remain elevated. China also holds a dominant position in the production and processing of rare earth elements, which are critical for advanced technological manufacturing. What matters is not who owns the reserves, but who has the production and processing capabilities—and China clearly leads in this area.

In summary, the United States can no longer stop China's rise. Its only option is to try to slow it down, and the costs of this rivalry will continue to be felt across the global economy. The U.S. move toward Venezuela, which holds some of the world's largest oil, natural gas, and gold reserves, is just one part of this struggle for global influence. Tensions over Greenland are also likely to increase, while China is expected to take a stronger stance on Taiwan. This hegemonic competition remains the main

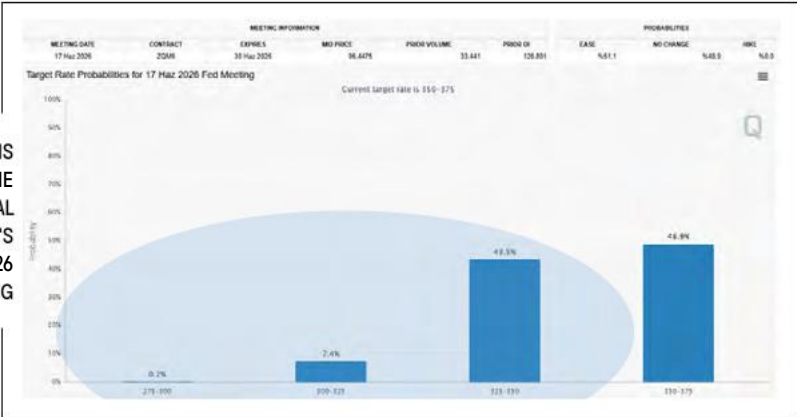
source of global uncertainty. As a result, the upward trend in precious metals is expected to continue, with silver potentially targeting the \$102 level again.

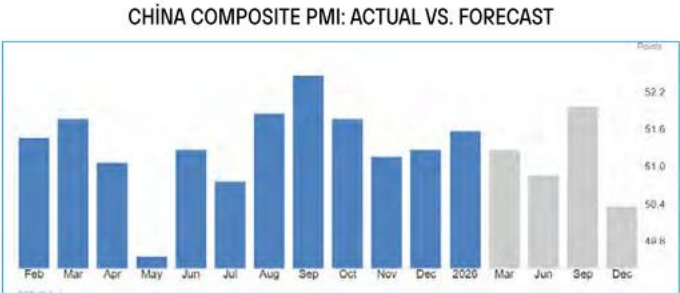
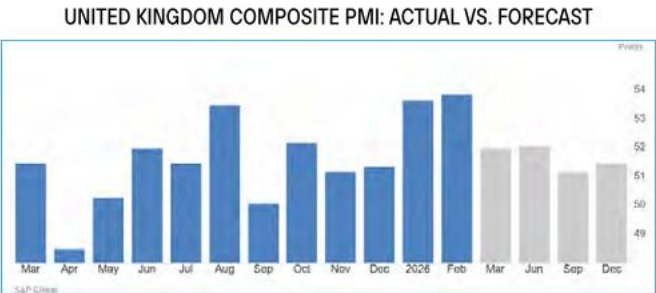
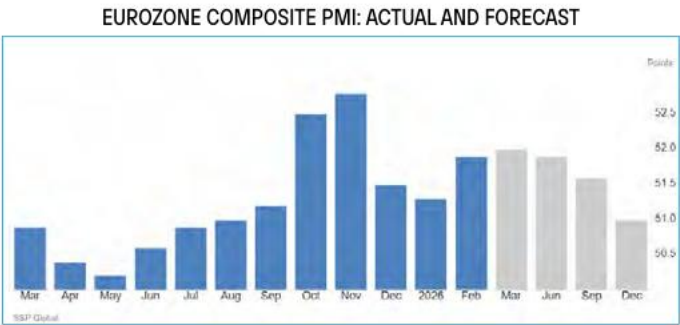
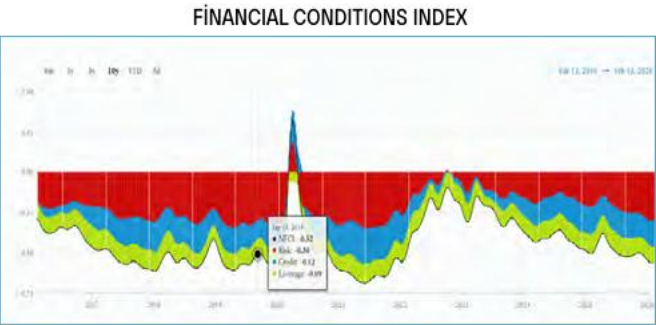
However, one important point should not be overlooked. Despite China's technological and military strength, it still struggles to shape international politics

to the same extent as the United States. The reason lies in a simple principle: “He who holds the seal holds the power.”

Today, that seal remains in the hands of the United States. The “seal” is the dominance of the U.S. dollar as the world's reserve currency and its central role in the global financial system. While the euro has gained ground, the yuan's share is still growing relatively slowly. As the yuan's role in the financial system expands—which we expect to happen rapidly—China's influence in international politics will become much stronger.

EXPECTATIONS FOR THE FEDERAL RESERVE'S JUNE 2026 MEETING





Global growth is expected to maintain its momentum in 2026, led by the United States, supported by interest rate cuts and accommodative financial conditions.

The Federal Reserve’s rate-cutting cycle is continuing. However, the Fed is more likely to leave rates unchanged at its January, March, and April meetings. The next rate cut (25 basis points) is most likely to come at the June meeting. Since the overall policy direction remains toward easing, we do not expect markets to react negatively to the longer interval before the next cut.

The Chicago Fed Financial Conditions Index is an indicator that should always be monitored closely (negative readings are generally positive). Looser financial conditions mean greater liquidity, lower

borrowing costs, improved demand conditions, and more favorable access to financing. Financial conditions are currently at their most accommodative levels since the post-COVID period. We believe these conditions will continue to support real-sector activity and, consequently, global economic growth. We have consistently stated for months that we do not expect a global recession, and we continue to maintain this view with confidence. We expect 2026 to be another year of continued global economic expansion.

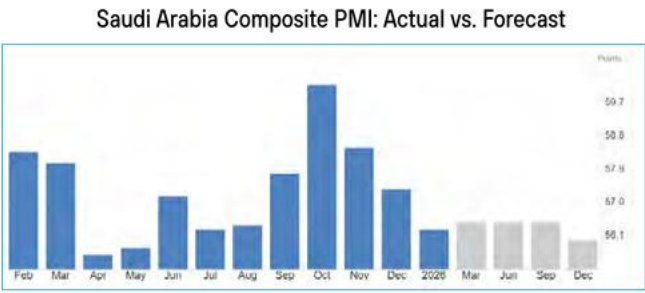
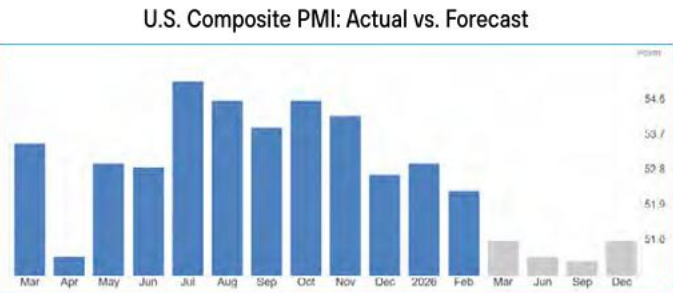
Economic activity in the United States (in real volume terms rather than nominal value terms) continued to expand in January. A PMI reading above 50.0 indicates real growth, and the pace of expansion remained solid. This is noteworthy given that throughout 2025, discussions of a global recession dominated television broadcasts and social media. Similar concerns are being voiced for 2026. However, forecasts based on new orders suggest that the U.S. economy will continue to grow in 2026, albeit at a somewhat slower pace. Our expectation, however, is that Fed rate cuts will contribute to both a recovery in the labor market and an acceleration in economic growth. It should also be remembered that the United States will hold midterm elections in

November 2026. President Trump, who continues to take an active approach in both domestic and foreign policy, will need a strong electoral outcome, and that will require a growing U.S. economy.

The recovery trend in Europe also continued. We observed that the ECB’s rate cuts have provided some support to economic activity. The Eurozone Composite PMI indicated that economic activity in the region continued to expand in January. Leading indicators suggest that growth will continue throughout 2026. Economic activity in the United Kingdom also remains in expansion territory.

Higher tariffs have not significantly disrupted China’s economy, as its competitive pricing power has enabled it to expand rapidly into alternative markets. China’s economy recorded growth in January for the eighth consecutive month. We expect China to remain a positive contributor to global growth in 2026 as well.

Meanwhile, the ongoing transformation in the Middle East continues to support non-oil economic activity across the region. We expect strong economic momentum to persist in the coming months, particularly in Qatar, Saudi Arabia, and the United Arab Emirates.



As the upward trend in global markets continues, growth in Türkiye may accelerate, supported by interest rate cuts and improving corporate balance sheets, while both the stock market and housing sector could benefit from these developments.

Our outlook for the S&P 500 Index was positive last year, and the index continued to reach record highs throughout the year. As noted in our broader assessments, the rally in the S&P 500 was not limited to a handful of large, popular companies; rather, it was broad-based, as confirmed by the performance of the Equal-Weighted S&P 500 Index. We believe the upward trend in the S&P 500 may continue during the first half of the year, with the 7,400 level emerging as a potential target.

However, as illustrated in the accompanying chart, valuations have entered relatively expensive territory. Nevertheless, we expect concerns regarding a potential asset bubble to become more relevant in 2027 rather than in the current year. In the meantime, strengthening economic activity could provide additional support to the banking sector. We also see a strong possibility that the Russell 2000 Index, which represents mid-sized companies, may outperform other major indices this year.

Within the technology sector, companies focused on artificial intelligence hardware are likely to outperform AI software companies. Given the growing strategic importance of rare earth elements, producers operating in this field may also warrant close attention.

Meanwhile, developments in the VIX Index and its futures markets indicate that investor risk appetite remains elevated. We expect the EUR/USD exchange rate to remain within the 1.1500–1.2000 range for some time.

VIX Futures

Symbol	Expiration	Last Price	Change	High	Low	Settlement	Volume
VIX	-	18.89	-1.33	21.21	21.21	-	-
VX08/Q6	02/25/2026	-	-	-	-	20.7531	-
VX09/H6	03/03/2026	-	-	-	-	20.7531	-
VX10/H6	03/11/2026	20.3	-0.45	20.3	20.3	20.7531	2
VX/H6	03/18/2026	20.1	-0.65	21.25	19.98	20.7531	73469
VX12/H6	03/25/2026	-	-	-	-	20.7531	-
VX13/J6	04/01/2026	-	-	-	-	20.7531	-
VX/J6	04/15/2026	20.7	-0.54	21.5	20.6	21.242	39114
VX/K6	05/19/2026	20.95	-0.40	21.55	20.87	21.35	10353
VX/M6	06/17/2026	21.15	-0.34	21.65	21.1	21.4928	5307
VX/N6	07/22/2026	21.7	-0.30	22.1	21.65	21.9999	2302
VX/Q6	08/19/2026	21.88	-0.29	22.25	21.85	22.1485	1231
VX/U6	09/16/2026	22.2	-0.27	22.57	22.2	22.4681	395
VX/V6	10/21/2026	22.5	-0.13	22.7	22.5	22.6312	2

S&P 500 INDEX



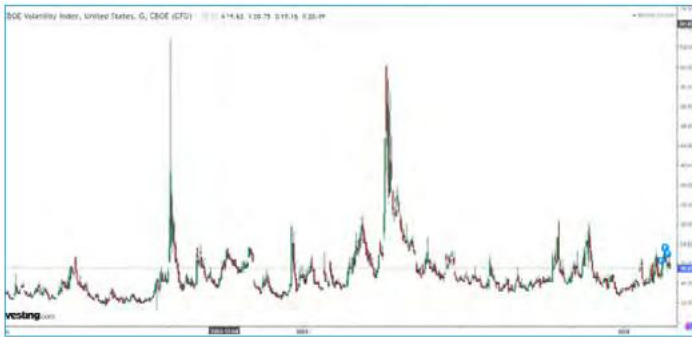
S&P 500 INDEX MARKET CAPITALIZATION / NET INCOME



EQUAL-WEIGHTED S&P 500 INDEX



VIX FEAR INDEX



EURO/USD EXCHANGE RATE



Expectations for the Turkish economy and domestic markets

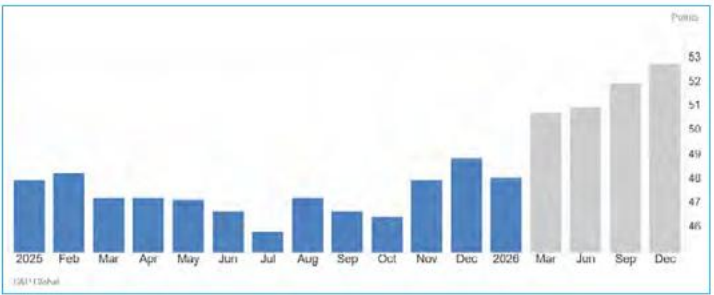
Despite global growth in 2025, Turkey’s economy contracted over the year according to PMI data, weighed down by high interest rates, weak demand and tight net working capital in the market. However, we saw some signs of life in November, December and January. The central bank’s rate cuts have begun to pass through, slowly, to market lending rates (still high, however). Despite high rates, housing and car sales remain quite strong. The attached chart shows that investor purchases in the housing market continue (credit-financed sales are weak because rates are high). We expect the strong trend in home sales to continue into 2026.

Wealth holders are not chasing foreign currency as they did in previous years; they prefer to stay in lira. After benefiting for a period from high lira rates, they now seem to be trying to profit from house price increases, which we expect to outpace inflation. A strong housing sector and continued rate cuts (we expect roughly a 10 percentage-point reduction in 2026) should bring the Turkish economy back into growth starting in the first quarter. We expect company balance sheets to improve in 2026 compared with 2025. Rate cuts and some balance-sheet repair will also support the BIST this year.

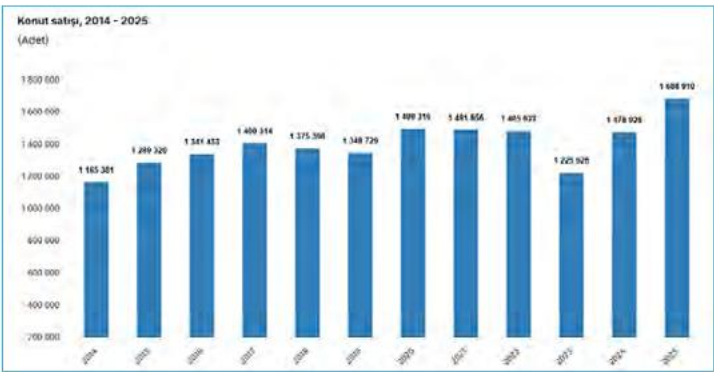
The claim that the lira will lose its appeal as rates fall requires scrutiny. That statement is meaningless unless supported by the math. As long as the central bank maintains the inequality I note in parentheses – policy rate > inflation + risk premium – a process of real appreciation in the lira will continue (i.e., the exchange rate will rise by less than the gap between lira and dollar interest rates). If we take inflation at 30.8% and the risk premium at 2.1, the current policy rate still satisfies that inequality. Foreign investors’ perception of Turkey’s risk (CDS) remains below the critical 300 level despite political turbulence at home and has recently fallen to the low 220s. That also strengthens the central bank’s control over the exchange rate.

Our year-end 2026 forecast for the dollar is about 51.50. We expect the lira’s real appreciation to continue in 2026, and we anticipate a positive performance from the stock market this year.

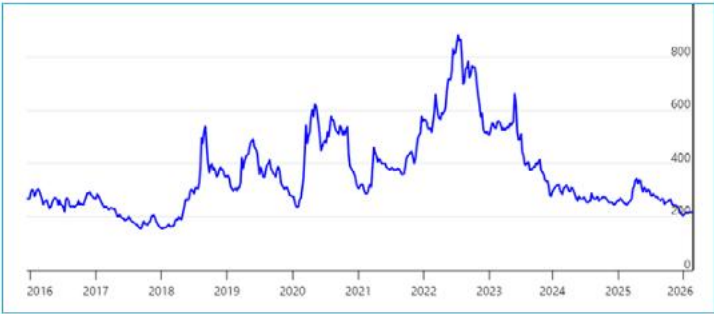
TURKEY MANUFACTURING PMI INDEX



HOME SALES



TURKEY CDS INDICATOR



FOREIGN CURRENCY DEPOSITS OF DOMESTIC RESIDENTS



TCMB POLICY RATE

22.09.2023	-	30.00
27.10.2023	-	35.00
24.11.2023	-	40.00
22.12.2023	-	42.50
26.01.2024	-	45.00
22.03.2024	-	50.00
27.12.2024	-	47.50
24.01.2025	-	45.00
07.03.2025	-	42.50
18.04.2025	-	46.00
25.07.2025	-	43.00
12.09.2025	-	40.50
24.10.2025	-	39.50
12.12.2025	-	38.00
23.01.2026	-	37.00

BIST100 INDEX



OSS Association Met with Trade Minister Ömer Bolat at the Automotive Advisory Meeting!

At the consultation meeting led by the OSS Association, industry representatives raised key issues directly with the Ministry to address export targets, strengthen domestic production, and ensure sustainable growth of the automotive aftermarket market.



Ömer Bolat:

This year will be a very positive year for domestic automotive industry exports.

Turkish Automotive Aftermarket Association (OSS) continues to support the industry with initiatives focused on the future of the automotive sector. Actively participating in the programs it organizes, the OSS Association works to ensure sustained growth in the aftermarket by communicating the industry's issues to the relevant institutions and organizations.

A consultative meeting bringing together representatives of the automotive sector at the YEDPA Trade Center — attended by the OSS board of directors and many others — was attended by Turkey's Minister of Commerce Ömer Bolat, deputy ministers and relevant department heads. Before the meeting, on July 25, 2025, OSS Chairman Ali Özçete and YEDPA Trade Center Board Chairman Salih Sami Atılğan paid a courtesy visit to Minister of Commerce Prof. Dr. Ömer Bolat at his office. During the meeting the current state of the automotive aftermarket was assessed and topics such as steps to foster sector development, increasing export potential and supporting domestic pro-

duction were discussed. It was decided to hold a large, wide-ranging event where OSS members' common problems could be heard. Following that contact, the consultative meeting with industry representatives was held on August 18, 2025.

Domestic production is the backbone of the automotive industry

Speaking at the consultation meeting addressing current issues in the automotive automotive aftermarket sector, Trade Minister Ömer Bolat said that the main backbone of the automotive industry is domestic, adding, "When I say the backbone of the automotive sector in Turkey is domestic, I mean that companies producing in Turkey—Ford Otosan, Toyota, Hyundai Assan, Oyak Renault, Tofaş and our electric vehicle Togg—provide employment for 400,000 people." When you include suppliers, subcontractors, spare-parts makers, service providers and repair shops, the number of people working in the auto industry truly exceeds a million.



Ömer Bolat:

Domestic production capacity is turning Turkey's automotive sector into a strategic hub in terms of employment, capacity and global competitiveness..



Ali Özçete:

The spare parts sector is not only the foundation of exports, but also of safety and sustainable growth.

Turkey's automotive journey began in 1971 with assembly and gradually increased its local content. Today, with 1.468 million – roughly 1.5 million – vehicles produced, we have the world's 13th largest automotive industry. We are currently fourth in Europe. This Turkish-made product, the Turkish car, the Turkish supplier industry in Europe has become a symbol of technology and quality. Over the last 20 years we have carried out such a revolution in industry, the economy and manufacturing that everywhere we go Turkey is regarded as a respected, prestigious country with a strong economy, high-quality production and very advanced technology. We are very pleased to see that. This year we will say "41 times mashallah" about exports!

Emphasizing that the automotive sector has been the export leader for the past 15 years, Ömer Bolat continued: "Last year the sector reached \$37.2 billion in exports. In the first seven months of this year our automotive exports rose by 14 percent; if we can keep up that pace it means we'll comfortably reach an average of \$41 billion. Of last year's \$37 billion, \$16 billion came from the supplier industry. If you add the share of Turkish component suppliers that go into the vehicles sold by the manufacturers, that brings the supplier industry's contribution to \$24 billion – that is your handiwork. So roughly two-thirds of the \$37 billion, about \$24 billion, comes from suppliers. This year we will exceed \$40 billion and, God willing, we will say \$41. We will be saying '41, mashallah' in automotive exports. In the first seven months of this year our automotive exports grew by 14 percent; if we can maintain that momentum we'll comfortably reach an average of \$41 billion."

Commerce Minister Ömer Bolat, describing a major global transformation in the automotive sector, said that 11.7 million electric cars were sold worldwide last year and that electric vehicle sales in Turkey are also rising very quickly. He added that whenever a decision is made concerning the automotive industry it inevitably draws attention around the world. "Every country wants to preserve the automotive industry as a fundamental backbone – metals, engineering, automotive are very critical sectors. Here we are fighting actively to first protect what we have achieved and then to advance further. In the last two and a half years very important decisions have been taken in foreign trade for the automotive industry. Protection measures have been implemented for our national local manufacturers against unfair competition. Additional product duties were introduced," he said.

Our sector is one of the most critical driving forces of the automotive industry!

Commenting on the meeting, OSS Association President Ali Özçete said, "Although the automotive spare parts sector is often seen as a consumer goods industry, it is actually a critical safety sector directly tied to the protection of life and property. For this reason, the sustainable development of our sector is important not only economically but also for pub-

lic safety. As of 2024, the automotive industry leads Turkey's exports with \$37.2 billion. While it is usually associated with new vehicle exports, spare parts exports hold the largest share of total exports, clearly showing that the true champion is the spare parts sector. This fact proves that our sector is one of the most critical driving forces of the automotive industry.

At our meeting we had the opportunity to convey our members' problems, expectations and proposed solutions directly to the Minister, the Deputy Ministers and the relevant department heads. Many topics were discussed in detail: the serious dangers posed by counterfeit spare parts on the market; the need for global brands to include more domestic manufacturers in their supply chains; the need for predictability in the investment environment; and the measures that should be taken in response to incentive policies in countries such as Egypt. It was extremely valuable for us that the Minister and his team listened carefully to the sector and gave assurances that the necessary steps will be taken. As OSS Association, we believe the demands we have put forward as the common voice of our members will become concrete policies that contribute to our country's economic development, export strength and public safety."

OSS Association Reviewed 2025!



The biggest problem in the aftermarket in 2025 was the excessive rise in costs!

“
2025 was a year in which resilience was tested more than growth for the aftermarket; production was maintained, but cautious balance led to a decline in sales in the final quarter.
”

The stagnant trend seen in the automotive aftermarket in 2024 continued into 2025. In the final quarter of 2025 the sector maintained a flat course in sales, exports and employment, and it remains cautious about 2026. According to the 2025 Year-End Sector Assessment Survey conducted by Turkish Automotive Aftermarket Association (OSS), domestic sales in the fourth quarter of 2025 fell by an average of 3.94% in dollar terms compared with the same period in 2024. In the previous survey, 33.3% of manufacturer members were planning investments; in the new survey that figure dropped to 25.6%. The most commonly observed problem in 2025 was “excessive increases in costs.” The survey also lists “cash flow problems” and “loss of business and turnover” among the major issues for members.

Ali Özçete, Chairman of the Board of the OSS Association, said 2025 was a year in which the impact of global and local economic conditions was felt in the automotive aftermarket. “However, the sector stood out as a year in which production, employment and operational continuity were preserved. Despite a limited tightening of financial conditions in the early part of the year, the aftermarket delivered a balanced performance over the year and closed strongly. The preservation of production capacity, stable employment levels and ongoing demand demonstrated the sector’s financial resilience. In this respect, 2025 served as a ‘test of financial confidence and resilience’ for the aftermarket, and the sector successfully navigated the period,” he said.

Turkish Automotive Aftermarket Association (OSS) assessed the 2025 year-end for the automotive aftermarket through a survey of its members. According to OSS’s 2025 Year-End Sector Assessment Survey, the automotive aftermarket experienced a decline in sales in the fourth quarter of 2025. The survey indicates that domestic sales in the fourth quarter of 2025 fell by an average of 3.94% in dollar terms compared with the fourth quarter of 2024. In that period, distributor members saw dollar-denominated sales rise by 1.71%, while manufacturer members experienced a 9.87% decline.

The downturn in collection processes has slowed.

The survey also asked about expectations for the first quarter of 2026. According to responses, the sector expects domestic sales to rise by 0.5% in dollar terms in the first quarter of 2026. OSS Association members reported that collection processes fell from 45.1% in 2024 to 43.5% in 2025; 13.8% of members said the collection process improved, while 42.5% said it worsened.

One in three companies increased employment in 2025.

Thirty-one point three percent of respondents increased their workforce in 2025 compared with the previous year, and 37.5% kept employment stable. The share of members saying their workforce decreased was also 31.3%. Employment rose among manufacturing members, while among distributor members the share reporting a decline remained at 29.3%.

The biggest problem in 2025 was steeply rising costs.

Problems in the sector made up one of the survey’s most striking sections. The top issue observed by members in 2025 was “sharp increases in costs,” cited by 81.3%, followed by “cash-flow problems” at 66.3%. Some 52.5% of members identified “loss of business and turnover” as the sector’s third biggest difficulty. Forty-three point eight percent pointed to “shipping costs and delivery problems,” 23.8% to “problems at customs,” and 21.3% to “employment problems.” In addition, 15% of participants listed regulatory changes among the important issues.



As rising costs squeeze the sector, cash flow problems and lost revenue emerge as the main risks threatening operational sustainability.

While investment plans in the sector weakened, negative expectations declined significantly.

Producer members' appetite for investment has shut down.

The survey also put the sector's investment plans under the microscope. According to the poll, 23.7% of members said they plan to make new investments in the next three months. In the previous survey, 33.3% of producer members were planning investments; in the new survey that share fell to 25.6%. Among distributor members, the figure rose from 10.3% to 22%. Compared with the previous survey, the share of distributor members who expect the sector to follow a more negative course over the next three months fell from 41% to 24.4%, while the share of producers fell from 42.9% to 25.6%.

Production rose, exports fell.

The average capacity utilization rate reported by producers for 2025 was 72.56%. That rate had been 78.15% in 2024. In the last quarter of 2025 members' production increased by 2.56% compared with the same quarter of 2024. Exports in the last quarter of 2025 fell by 4.23% in dollar terms compared with the last quarter of 2024.

Despite temporary financial difficulties, the aftermarket protected production and employment.

Commenting on the survey results and offering an outlook for 2026, OSS Association Chairman Ali Özçete said: "2025 stood out as a year in which global and local economic conditions were felt in the automotive aftermarket, but the sector managed to preserve production, employment and operational continuity. Despite some tightening of financial conditions in the early part of the year, the aftermarket delivered a balanced performance across the year and closed strongly. The preservation of production capacity, the steady course of employment levels and the continuity on the demand side demonstrated the sector's financial resilience. In that sense, 2025 served as a 'financial confidence and resilience test' for the aftermarket, and the sector came through it successfully."



The record domestic sales market is securing the future of the aftermarket!

Ali Özçete, noting that the dynamics of the automotive aftermarket have changed significantly, continued: "Relative stabilization of the exchange rate over the past two years kept spare part price increases below the inflation rate, but during the same period labor costs—driven by wages, rent and operating expenses—rose well above inflation. For the first time in the sector we're seeing labor costs overtake spare part costs. This creates a direct cost pressure on both service providers and end consumers. On the other hand, the average age of Turkey's vehicle fleet is high, which keeps demand for maintenance and spare parts lively; that provides a strong and sustained demand base for the aftermarket in the long term. At the same time, record new-car sales broken three years in a row and the increase in vehicles per capita show that car ownership has become more widespread, meaning the aftermarket will serve a broader customer base going forward. In addition, most of the roughly 1.2 million cars sold in 2024 will come out of warranty by 2026, which points to continued growth in demand for maintenance, repairs and spare parts in the aftermarket."



The aftermarket sector, accounting for 38% of Turkey's automotive exports, forms its backbone and remains the strongest driver of sustainable growth thanks to demand from the EU.

The aftermarket sector is the backbone of Turkey's automotive exports.

Emphasizing that the aftermarket export market also showed a strong performance in 2025, Ali Özçete said, "Supply industry exports rose by 6% in 2025 compared with the previous year, reaching 15.77 billion dollars and accounting for 38% of total automotive exports. This large share shows that the aftermarket sector continues to be the backbone of Turkey's automotive exports. The steady increase in demand in EU markets—especially Germany and France—confirms that the sector's competitiveness has been maintained. This picture stands out as one of the key pillars supporting the aftermarket's sustainable growth in 2026."

OSS Association Carried the Turkish Automotive Aftermarket to the Global Stage in Paris

Turkish Automotive Aftermarket Association participated for the first time as an official Turkish national delegation at the Equip Auto Paris fair, one of the most important international meeting points for the automotive aftermarket sector.

Organized by ALZ International in cooperation with the OSS Association, and with Turkey's national participation, the Equip Auto Paris 2025 fair — held in Paris from October 14–18, 2025 — brought together international stakeholders from the automotive aftermarket. Celebrating its 50th anniversary this year, the show hosted 1,400 exhibitors and 100,000 professional visitors. Sixteen Turkish companies took part, and the OSS Association brought together officials from the Turkish pavilion with purchasing delegations and representatives of the domestic supplier industry from around the world.

Commenting on the fair's significance, OSS Association President Ali Özçete said, "Equip Auto Paris is especially important to us because it's the first event where we organized a national participation. Being side by side with the world's largest brands, global manufacturers and distributors has had a very positive effect. It's gratifying to have received assurances that at the next fair in 2027 we will again share the same space with major global manufacturers and distributors."

While continuing its work on the future of automotive, Turkish Automotive Aftermarket Association (OSS) also continues to represent the sector at leading industry events. In this context, the association took on national participation for the first time at Equip Auto Paris, one of the most important international gatherings for the automotive aftermarket. Celebrating its 50th anniversary, the fair hosted 1,400 exhibitors and 100,000 professional visitors.

At Equip Auto Paris 2025, OSS successfully represented Turkey's automotive aftermarket on the international stage with its own stand and through its members. The Turkey Pavilion, organized by ALZ International and coordinated with OSS, occupied a prime position in the main hall with support from the Ministry of Trade. OSS members benefited from government support; 16 Turkish firms participated in the pavilion.

A grand opening gala held at Palais Brongniart on the evening of the fair's first day brought together leading industry figures. Visitors were received at the OSS stand throughout the event, and association leaders also visited members' booths to meet important industry representatives. At a breakfast event, OSS members, officials from the Turkish pavilion and purchasing delegations from around the world came together.



At the fair held from October 14–18, 2025, the Turkey Pavilion, supported by the Ministry of Trade, was located in the first hall. Sixteen Turkish companies participated in the fair, and OSS members also benefited from government support.





Ali Özçete:

Equip Auto Paris became a strategic showcase that positioned Turkey's aftermarket strength on a global scale.

Republic of Turkey Ambassador to France Yunus Demirer Visited the OSS Booth

On the second day of the fair, Yunus Demirer, the Republic of Turkey's Ambassador to the French Republic, visited the OSS booth and the booths of Turkish companies at Equip Auto Paris 2025. The OSS delegation hosted Ambassador Demirer at the OSS stand and briefed him on developments in Turkey's automotive aftermarket sector, international collaborations, and the sector's position in Europe. Turkey's Commercial Counsellor Murat Gören and Trade Counsellor Gonca Köksal Ensari also visited the association's and member companies' booths.

"As OSS, We Are Increasing Turkey's Representation Internationally"

Ali Özçete, Chairman of the OSS Association Board, commented after the fair: "Equip Auto Paris is very valuable to us because it was the first fair where we participated with a national pavilion. Being alongside the world's largest international brands, global manufacturers and distributors had a very positive effect. It is gratifying to have a commitment to participate in the same area with such large global manufacturers and distributors again at the next fair in 2027. As OSS, we are increasing Turkey's representation on the international stage. We will continue to do everything we can to ensure Turkey, OSS members and aftermarket players are represented on international platforms."

Equip Auto Paris offers important cooperation and deal-making opportunities for France as well as for Turkey. France sources 36% of its total imports from automotive products, making it an important market for Turkey. Turkey's automotive supplier exports to France amounted to \$983,362,000 in 2024, an increase of 15.5% compared to the previous year. France's geographic position provides significant advantages for access to alternative markets such as Morocco, Tunisia and Algeria.

One of Europe's most important commercial events

Equip Auto Paris, an international trade fair for automotive professionals, stands out as a highly regarded trade event for France's automotive industry, the aftermarket and service sectors. Putting innovation, expertise, commerce and camaraderie at its center, the fair aims to bring together every name and body of knowledge in the automotive value chain to reinvent mobility services. Equip Auto Paris celebrates half a century of innovation, encounters and progress in the automotive, aftermarket and connected mobility services sectors. Founded in 1975, the fair is one of France's leading B2B events for the automotive industry. This anniversary, a milestone for the automotive sector, brought together diverse players across the entire value chain (passenger cars, light commercial vehicles, heavy vehicles, two- and three-wheeled motor vehicles and unregistered vehicles (VSP)) in Paris. The event offered sector professionals, exhibitors, visitors and French and international journalists an opportunity to share their visions for the future.



The automotive aftermarket is experiencing a new climate change!

Turkish Automotive Aftermarket Association (OSS) held its final meeting of 2025 with the participation of its members and industry representatives.

Turkish Automotive Aftermarket Association (OSS) held its final meeting of 2025 with the participation of its members and industry representatives. OSS Association Chairman Ali Özçete, speaking at the meeting about the new phase the sector is entering and the years ahead, said: "2023 was an extraordinary year for the sector. As we emerged from the pandemic, pent-up demand kicked in quickly; maintenance was done, vehicles were renewed, and business volumes rose far above what would be normal. But the real mistake was treating 2023 as if it were normal." Özçete went on to say that 2024 and 2025 are not bad years, but that a new normal is now in place, and continued: "The picture we see today is the new normal, whether we like it or not. We are facing higher labor costs, tougher competition, lower margins and a more selective customer profile. We cannot manage this new period with old habits. This is not a failure; it is plainly a climate change."

Continuing, Özçete said: "Contractions in European markets have driven global targets toward relatively active markets like Turkey. That has led stakeholders operating in Turkey to face higher growth expectations. Remember that zero-kilometer vehicle sales in Turkey have hit record

levels over the past three to four years. Most of the roughly 1.2 million cars sold in 2024 will fall out of warranty in 2026. That means maintenance, repair, service and spare parts. In other words, the work for this sector is not ending — it's really just beginning now. We leave 2023 behind, we are reading 2024–2025 correctly, and we are building 2026 with intelligence, balance and togetherness."

Turkish Automotive Aftermarket Association (OSS) held its year's final member meeting with wide participation. The event, which brought together OSS Association members as well as industry representatives, opened with remarks from OSS Association Secretary General Emirhan Silahtaroglu. Afterwards, the Association's Chairman Ali Özçete reviewed 2025 and shared his outlook for 2026.

**2023 was an exception;
the sector is now adapting
to a new reality of high
costs, low margins, and
fresh competition.**

**We Must
Leave 2023
Behind**

Ali Özçete



Stressing that they had gathered to take an honest picture of the sector, Ali Özçete said, "We are here so we can lay out a sensible roadmap. 2023 was an extraordinary year for the sector. As we emerged from the pandemic, pent-up demand kicked in quickly; maintenance was done, vehicles were renewed, and business volumes rose far above what would be normal. But the real mistake was treating 2023 as if it were normal." Özçete reiterated that 2024 and 2025 are not bad years but that new normals are now in effect and added: "The picture we see today is the new normal, whether we like it or not. We are facing higher labor costs, tougher competition, lower margins and a more selective customer profile. We cannot manage this new period with old habits. This is not a failure; it is plainly a climate change."



“Contraction targets in Europe have been redirected toward Turkey”

Stating that the downturn in European markets has affected global balances, Özçete said, “The contraction in European markets has led global targets to be redirected toward relatively more active markets like Turkey. This has resulted in sector stakeholders operating in Turkey facing higher growth expectations.”

Noting that 2025 was a difficult year for the sector, Özçete added, “If 2025 was the year wounds were opened, 2026 must be the year we heal them. We can only do that with intelligence, balance, and realistic expectations.”

“Labor costs have crossed a critical threshold”

Pointing to a significant structural change in the industry, Özçete emphasized that in many repairs today labor costs have overtaken the cost of parts, and said: “This risks increasing the ‘Do It Yourself’ trend. We need to take this threshold seriously in terms of safety, informality, and the sector’s image.”

“No master mechanic, no industry”

Ali Özçete said there is a serious problem finding qualified technicians and independent service providers: “Authorized services are perceived as expensive, while independent workshops struggle to gain sufficient trust in the eyes of consumers. Despite high wages, young people are not choosing this profession. This is not just about pay; it’s an issue of prestige and prospects. If there are no master technicians, the sector doesn’t exist. This is exactly where we need to hold up a mirror to ourselves.”

He also noted that manufacturers and distributors often focus only on selling the product: “While we try to manage targets at the top, we leave the future of technicians, service providers, and young

people below to fend for themselves. This is exactly why OSS exists: to position this sector properly for the future.”

“The real work starts now”

Recalling that new car sales in Turkey have reached record levels over the past three to four years, Özçete said, “A large portion of the roughly 1.2 million cars sold in 2024 will come out of warranty in 2026. That means maintenance, repair, service, and spare parts. In other words, the sector’s work is far from over—the real work is starting now. We’ve left 2023 behind, we’re correctly reading 2024–2025, and we are building 2026 with intelligence, balance, and togetherness.”

“We have a strong, institutional partnership with FIGIEFA”

Speaking about cooperation with the International Federation of Automotive Aftermarket Distributors (FIGIEFA), Ali Özçete said, “As OSS Association, we have a strong, institutional partnership with FIGIEFA, where we hold a seat on the board and that represents 19 national associations from 18 countries and 5 purchasing groups. Addressing critical topics that directly affect our industry and

Thanks to its strong cooperation with FIGIEFA, the OSS Association aims to ensure effective representation of Turkey’s automotive aftermarket sector in Europe and to secure its strategic positioning.



Turkey’s spare-parts exports—such as ‘Made in EU’—at the European level, and accurately communicating and making Turkey’s position visible, gives us an important and concrete opportunity to engage with European institutions and the European Parliament through FIGIEFA.”

Current economic assessments were shared.

Later in the program, Hakan Hacızade, founder of event sponsor BS Customs Brokerage, presented the solutions they offer for customs clearance and logistics processes. On behalf of TEB Factoring, Export Sales Director Müge Keçeli and Domestic Sales Director Hakan Seçkin provided information on 360-degree factoring solutions for businesses.

In the final part of the event, Erkin Şahinöz — former research director at the Fed, founder of Şahinöz Academy, and consultant in strategic management and business intelligence — shared his latest economic assessments with attendees.

Plaques of appreciation were presented to the event’s sponsors BS Customs Brokerage, TEB Factoring, Barış Packaging, and to speaker Erkin Şahinöz.



OSS Redefines the Roadmap for Turkey's Automotive Aftermarket



A new report prepared under the leadership of the OSS Association aims to provide the industry with a roadmap by using data to reveal the size, potential and transformation of Turkey's automotive aftermarket.

Turkish Automotive Aftermarket Association (OSS) has relaunched an important study to reveal the current state and future potential of Turkey's automotive aftermarket. Work officially began on the second edition of the Strategic Analysis of the Turkish Automotive Aftermarket Automotive aftermarket, first prepared for the OSS Association by Frost & Sullivan in 2024.

Founded in the 1950s, Turkey's automotive sector has undergone a remarkable transformation and growth over the years. Turkey's location at the crossroads of a wide region—especially Europe—has helped the domestic automotive industry gain rapid momentum. Supported by skilled labor and strong production capacity, the OEM industry quickly made Turkey one of the world's leading automotive manufacturing hubs. In parallel with this development, the aftermarket sector, which is the most important complement to the OEM industry, also registered robust growth.

Despite having the capacity to produce first-rate components for the world's leading automotive brands, the aftermarket sector struggles to fully demonstrate its true scale due to a lack of sectoral data and comprehensive analysis. To fill this important gap and provide the industry with a sound roadmap, the OSS Association is commissioning a comprehensive market study of the refurbishment aftermarket for the second time.

Prepared specifically at the OSS Association's request by Frost & Sullivan—one of the world's most respected organizations in market research and analysis—the Strategic Analysis of the Turkish Automotive Aftermarket Auto-

motive aftermarket will examine the sector in all its aspects with a focus on passenger cars and light commercial vehicles. The report will thoroughly address the current size of the Turkish automotive aftermarket as shaped by global trends and challenges, growth forecasts, market dynamics, key trends and the mega-trends transforming the sector.

Led by the OSS Association, this study aims to increase the visibility of the aftermarket sector, support strategic decision-making processes with accurate data, and shed light on the sector's sustainable growth.



Work has officially begun on the second edition of the Strategic Analysis of Turkey's Automotive Aftermarket Automotive aftermarket report, first prepared for the OSS Association by Frost & Sullivan in 2024.



The OSS Association Has Elected Its New Board of Directors!

Ali Özçete
Re-elected as Chair
of the OSS Board of
Directors!

At its 2025 Ordinary Elective Administrative and Financial General Assembly meeting, the OSS Association elected its new Board of Directors and Board of Auditors members.



At the General Assembly, the newly elected Board of Directors, chosen unanimously, re-elected Ali Özçete—who first assumed the association's chairmanship in 2023—as president at its first meeting. Ali Özçete, re-elected president of Turkish Automotive Aftermarket Association (OSS), said, "In the new term we will continue to contribute to the development of our sector together with our members. As OSS, we are determined to carry the vision we created through shared wisdom and cooperation even further."



Ali Özçete:

We are determined to further advance the vision we created for OSS through shared insight and collaboration.

The OSS held its 2025 Ordinary Elective Administrative and Financial General Assembly. At the General Assembly meeting, held at the Elite World Grand Istanbul Hotel with strong participation from OSS members, the following were chosen to represent their companies as members of the new Board of Directors for the coming term: Ali Özçete, Ufuk Çilek, Emirhan Silahtaroglu, Fatih Odabaşlar, Cemal Çobanoğlu, Emre Şahin, Halit Başbuğ, Beylem Leblebici Birsen, Mehmet Karakoç,

Mustafa Tülümen, Müjdat Aras, Selim Aydınlioğlu, Selim Marangoz and Vebibe Kaplan Arslan. The Audit Committee members elected to serve for the two-year term on the new OSS Board are Aziz Kahya, Hayati Kaya, Hüseyin Muratoğlu, Erdoğan Kesmen, Özden Doğan and Şenay Bayram.





At the General Assembly meeting held at the Elite World Grand Istanbul Hotel with strong participation from OSS Association members,

Ali Özçete,
Ufuk Çilek,
Emirhan Silahtaroğlu,
Fatih Odabaşlar,
Cemal Çobanoğlu,
Hıdır Emre Şahin,
Halit Başbuğ,
Beylem Leblebici Birsen,
Mehmet Karakoç,
Mustafa Tülümen,
Müjdat Aras,
Selim Aydınlioğlu,
Selim Marangoz
and Vecibe Kaplan Arslan

were appointed as the new term Board of Directors members, representing their companies.



Ali Özçete:

In the new term, together with our members we will continue contributing to the development of our industry.

Ali Özçete will serve another term as president of the OSS Association!

After the General Assembly, the new Board of Directors held its first meeting. At the meeting, Ali Özçete, who has served as Chairman of the Board of the OSS Association since 2023, was re-elected. Other positions were also assigned: Ufuk Çilek was appointed Vice President, Emirhan Silahtaroğlu as General Secretary, and Fatih Odabaşlar as

Treasurer. OSS Association President Ali Özçete said, "I wish our Board members success in the new term. As OSS, over the past two years we have built a foundation based on equality, transparency and inclusivity, and we will continue to work with all our might to strengthen it. In the new term we will continue to contribute to the development of our sector together with our members. As OSS, we are determined to further advance the vision we have created through collective wisdom and cooperation."



OSS Association Met with the Industry at Automechanika Istanbul 2025

OSS Association, a strong presence at Automechanika Istanbul 2025 – one of the aftermarket automotive industry’s most important meeting points – brought industry professionals together through the International OSS Conference and members-only networking areas, providing an important platform for collaboration, knowledge sharing, and strategic dialogue.

Automechanika Istanbul 2025, the world’s leading trade fair brand in the automotive aftermarket and the region’s largest international event for the sector covering Eastern Europe, the Balkans, the Middle East and North Africa, once again brought the industry together this year. Organized by Turkish Automotive Aftermarket Association (OSS) – the umbrella organization for Turkey’s automotive aftermarket – in cooperation with Messe Frankfurt Istanbul and Hannover Fairs Turkey, the event was held at the TÜYAP Fair and Congress Center in Istanbul from June 12–15, 2025.

On the first day of Automechanika Istanbul 2025, leading figures from the industry gathered for the 10th International OSS Conference. Held under the theme “Trends in the Aftermarket,” the conference featured Juan Thomaz, Vice President Aftermarket, Europe, Middle East and Africa (EMEA) at PHINIA, as a guest speaker.

After the conference concluded with an awards ceremony, OSS members met and socialized at a cocktail reception in the OSS Lounge, where association members had the opportunity to network and chat.



automechanika
ISTANBUL



On the first day of Automechanika Istanbul 2025, leading figures in the industry came together at the International OSS Conference, held for the 10th time this year. The conference, held under the theme “Trends in the Aftermarket,” featured Juan Thomaz, Vice President of Aftermarket for PHINIA Europe, Middle East and Africa (EMEA), as a guest speaker.



automechanika ISTANBUL

Panels Shaping the Future at Automechanika Istanbul Academy

As part of Automechanika Istanbul Academy, many panels this year shed light on the future of the automotive aftermarket. The strong interest in the academy program showed that the events responded well to the sector's current needs and expectations.

The series began with the panel "A Woman's Mark in the Aftermarket: Messages for the Future," organized by the OSS Association's Work-Life Balance Working Group. Women professionals and executives from the industry shared their forecasts for the future and discussed the importance of female employment in the sector. Those inspiring presentations offered valuable perspectives to both young professionals and other stakeholders.

Later in the day, the OSS Association's Education and Organization Working Group held the panel "The Road to the Automotive Industry of the Future: Transformation Through Education." That session addressed rapidly changing technologies in the automotive field, the growing importance of a skilled workforce, and the critical role of education in driving change. Expert speakers offered important insights into the new-generation competencies the industry needs.

Also among the day's highlights was the "Equality 4 Business" panel, organized within Automechanika Academy with the support of the OSS Association's Work-Life Balance Working Group and TAYSAD. The presentations raised awareness about women's employment, inclusivity, and equal opportunity. Speakers emphasized that a sustainable work culture is possible only through approaches based on diversity and equality.

This year's panel program at Automechanika Istanbul Academy drew great interest for the way it comprehensively addressed the industry's transformation agenda and presented a vision for an inclusive future.





AFM'25 Summit Organized by the OSS Association Brought the Industry Together!

At the OSS AFM'25 Summit, assessments emphasized that the automotive aftermarket has become a strategic component of global trade. Industry representatives warned that, in the face of rising geopolitical risks and economic fragmentation, the focus should be on sustainable growth, a predictable investment climate and international cooperation rather than short-term reflexes.

Turkish Automotive Aftermarket Association (OSS) held the second Aftermarket Summit in Istanbul in 2023, after staging the first one the previous year. The widely attended summit addressed the industry's problems and future trends across eight sessions and with 20 distinguished speakers. OSS Association Board Chairman Ali Özçete said the spare parts sector is the export champion, noting, "This isn't talked about enough, but last year the automotive sector was the top exporter with \$40 billion. Unfortunately, when people think of automotive they only picture new vehicles and assume that because cars are manufactured in our country we have a \$40 billion export potential. That's not the case. The truth is that the largest share of that \$40 billion in

automotive exports is the spare parts sector, with \$14 billion. So we are the locomotive gear of the country – the spare parts industry is Turkey's export champion." Highlighting how shifts in the geopolitical landscape are profoundly affecting the industry, Özçete added, "Wars are increasingly taking the form of economic warfare rather than military conflict, and that has a very serious impact on us as a sector. As OSS, we strongly reject this direction. We are not an industry that should be an instrument of war. We don't want to be steered by commercial conflicts at home or abroad. We want to make long-term plans and define long-term strategies, adjust our business cycles accordingly, and plan our investments on that basis."

Otomotiv satış sonrası kanalındaki

Ali Özçete:

The truth is that the largest share of the \$40 billion automotive exports—\$14 billion—comes from the spare parts sector.





Turkish Automotive Aftermarket Association (OSS), made up of leading national and international suppliers in the automotive aftermarket channel, international trading groups and wholesale companies, held the Aftermarket Summit for the second time at DasDas in Istanbul. The summit, which drew strong interest and broad participation from every part of the industry, examined how the profound transformation in the automotive sector is affecting the automotive aftermarket market and discussed proposed solutions to the problems the industry faces. In sessions throughout the event, a number of prominent speakers gave detailed presentations on the sector's future and how to adapt to change in automotive.

"We are the strongest link in the independent replacement parts market!"

Sponsored by Maysan Mando Shock Absorbers, Automechanika, Spazio Smart Warehouse Solutions, Mann+Hummel, Schaeffler and ERD, the summit featured 20 notable speakers. Opening the event, OSS Association

Chairman Ali Özçete noted that the summit also marked the association's 30th anniversary. Saying the industry has come a long way in 30 years, Özçete said, "Thirty years ago there were people carrying spare parts on their backs between wooden shelves, salespeople waiting by fax machines for orders to come in, and repair shops trying to provide workshop services. Today our sector is integrated with the world, spread across Turkey, and has implemented the necessary technological investments and infrastructure. Our industry is developing not only in Turkey but globally, and we are integrated with the global developments. We are the strongest link of the independent replacement market, and we are the only association in Turkey that is a member of the FIGIEFA federation. In this context, in all our activities we act with approaches that support the independent replacement market and especially the end consumer's interest, and at the same time we all observe that our industry is undergoing a very large transformation."

Boundaries Are Disappearing in the Aftermarket: The Industry Is Being Reshaped by Integration, Competition, and Long-Term Strategy

Özçete went on to say that authorized dealers who serve the captive (manufacturer-dependent) replacement market have begun providing authorized service for other car brands as well. "Also, private workshops holding the TS12047 certificate can now service vehicles that are still under warranty. On the other hand, vehicle manufacturers have become important players in the aftermarket with the private-label parts they produce. Distributors, as part of these companies, are now offering both aftermarket spare parts and OES-branded parts together to the end consumer. This demonstrates how the structure is rapidly changing alongside the changing world and industry. In the future we may no longer speak of independent and captive replacement markets separately; the new slogan might simply be 'the replacement market.' As an association, we are focused not on today but on tomorrow."



Spare Parts Sector Is the Locomotive of Exports: Focusing on Long-Term Strategy Rather Than Short-Term Trade Wars.

We are not a tool of war!

Reminding everyone that the spare-parts sector is the export champion, OSS Association Chairman Ali Özçete said, "This isn't talked about enough, but last year the automotive sector was the top exporter with \$40 billion. Unfortunately, when people think of automotive they only picture new cars and assume that vehicle production alone explains that \$40 billion export figure. That is not the case. The truth is that the largest share of that \$40 billion in automotive exports belongs to the spare-parts sector, at \$14 billion. So we are one of the engine gears of the country — the spare-parts sector is Turkey's export champion. Sadly, while we focus on our work, development and innovation amid such positive progress, geopolitical changes and the fact that wars are increasingly economic rather than military are seriously affecting our sector. As OSS, we firmly reject this trend. We are not a sector to be used as an instrument of war. We do not want to be affected by intercontinental commercial conflicts. We do not want to navigate our country or the world according to commercial wars. We want to make long-term plans, set long-term strategies, adjust our business cycles accordingly, and plan our investments based on those strategies."

Industry challenges and the roadmap discussed

After OSS President Ali Özçete, Vecibe Kaplan Arslan, Sales and Business Development Manager at Maysan Mando; Michael Johannes, Vice President Mobility and Logistics at Messe Frankfurt; Uğur Yilmazer, Domestic Sales Manager at Spazio Smart Warehouse Solutions; Cemal Çobanoğlu, Aftermarket Sales Director at Mann+Hummel Turkey; and

H. Ömer İren, Sales Manager for Schaeffler Vehicles Lifetime Solutions Turkey & Azerbaijan, shared opening remarks with participants. Then Hakan Doğu, Founder and President of the Sustainable Mobility Initiative, delivered a presentation titled "The Present and Future of Automotive." The summit continued with a panel called "Women in Automotive." Moderated by OSS Association Board Member Beylem Leblebici Birsen, the panel featured Gupse Kaplan, General Manager of PEUGEOT Turkey; Nadine Perahya, Chairman of the Board at Intermobil; and Yeşim Keser, General Manager and Board Member at MA-PA.

European agenda put on the table

The afternoon session of the Second Aftermarket Summit began with a panel titled "What Is Happening in the Global and Turkish Economies." Veteran journalists Hakan GÜldağ and Vahap Muhyar assessed the topic. Next, Mubarak Moosa, Head of the Automotive Group at Frost & Sullivan, gave a presentation titled "Future Trends and Opportunities Affecting the Aftermarket in Automotive." One of the summit's notable sessions was "Turkey's Impact in the AEMEA Region." Moderated by Mesut Urgancılar, Groupauto Regional Director for the Middle East, Africa and India, the panel included speakers H. Burak Akin, Vice President of Service for Valeo Americas, Middle East and Africa; Murat İnce, Sales Manager (EMEA) for MAHLE Aftermarket GmbH; and Tufan Baysal, Aftermarket Director for Niterra in the Middle East, Africa and Eurasia, who all shared their views. The final part of the Second Aftermarket Summit concluded with a special session by historian, academic and author Prof. Dr. İlber Ortaylı.





Drift Day Held in Collaboration Between OSS Association and Gladsos!

The OSS Association came together with its members on Saturday, October 11 for Drift Day, an event held in collaboration with Gladsos as part of World Drift Day.

The event, held at Gebze Fahim Motorsport Arena, brought together representatives from the automotive aftermarket industry and created an atmosphere that was both adrenaline-filled and enjoyable. Professional drivers' performances, impressive drift demonstrations and activities throughout the day provided unforgettable moments. During the event, guests in the VIP Lounge reserved exclusively for OSS members had the opportunity to watch the shows from a prime spot while enjoying refreshments.



Turkish Market: Strong Volume, Fast Turnover

NEV Growth and the New Reality of the Aftermarket in 2025: What Global and Local Sales Figures Are Telling Us

The year 2025 went down as a year in which transformation accelerated in the automotive sector, both globally and specifically in Turkey. While total sales volumes showed the market’s resilience, the strong rise in the NEV (New Energy Vehicle) segment, made up of hybrid and electric vehicles, clearly indicated the industry’s direction.

Turkey Market: Strong Volume, Rapid Transformation

A total of 1,368,400 passenger cars and light commercial vehicles were sold in 2025. Of these, 1,084,496 were passenger cars, and 487,338 fell into the NEV (Hybrid + Electric) category.

These figures show that nearly half of Turkey’s car sales have shifted to new energy technologies. Even more striking is the growth in the NEV segment: year-end NEV sales for 2025 rose by 68% compared with 2024 (Source: S&P Global Mobility). This increase reflects the simultaneous impact of many dynamics – shifting consumer preferences, tax and regulatory policies, improvements in charging infrastructure, and changes in manufacturers’ product lineups. The Turkish market is being shaped not only by growth in total sales but also by a pronounced change in the technological composition of the vehicle fleet. As electrification’s share grows, the structure of the market is undergoing a lasting transformation.



**MOBILITY, TECHNOLOGY
and SUSTAINABILITY**
Working Group

Global Outlook: A Giant Market of 89.6 Million

Global sales of passenger cars and light commercial vehicles reached 89.6 million units in 2025.

The regional break- down is as follows:

Europe – 15.0 million units
USA – 16.2 million units
China – 26.6 million units

This table clearly shows that China continues to hold global weight in both production and consumption.

The center of electrification: China

In 2025, global sales of fully electric passenger cars and light commercial vehicles reached 14.7 million units. Total sales of hybrids plus electric vehicles (NEVs) amounted to 22 million units. (Source: S&P Global Mobility / Reuters)

Regional EV distribution:

Europe – 3.7 million units;
US – 1.5 million units;
China – 14.7 million units.





As electrification accelerates, the winners in the aftermarket will be those who adapt to the transformation most quickly.

As electrification accelerates, the direction of competition in the aftermarket is changing; players who quickly adapt to the technical transition, develop new capabilities, and move forward using data will come out ahead.



In the coming period the question won't be "Will electric vehicles become widespread?" but rather "Who will adapt to this transformation most quickly and correctly?"



China reaching 14.7 million sales on its own clearly shows that the center of the electric mobility transformation is in Asia. While Europe is steering the transition with regulations, China dominates the market through state incentives, economies of scale, and local-brand strategies. The US is more cautious but shows steady growth.

Where does Turkey fit in this picture?

Although Turkey is a medium-sized market by global volume, its NEV growth rate shows a very dynamic profile. An annual increase of 68% indicates that the market has passed the early adoption stage; electric vehicles are no longer a niche segment, and hybrid technology is firmly positioned as a transitional solution. This situation points to electrification in Turkey becoming a permanent and accelerating process.

The rise in NEV sales is not just a "product change"; it brings a comprehensive structural shift in the automotive aftermarket sector. This process makes increased training needs, investment in

technical equipment, greater prominence for software and electronics expertise, and new supply-chain dynamics inevitable. The lower mechanical parts intensity of electric vehicles could shrink traditional maintenance revenues. Conversely, areas such as software updates, battery management, and power electronics systems will create increasing value and open up new revenue models in the automotive aftermarket ecosystem.

In the coming period the question will no longer be "will electric vehicles become widespread?" but "who will adapt to this transformation fastest and most effectively?"

For the automotive aftermarket sector, the 2025 figures are not a warning so much as a signal of opportunity. Those who read the transformation early, develop their technical capacity, and adapt to new business models will be the winners of this new era.





Arda ARSLAN

Bosch Mobility Aftermarket Solutions
Regional Director Turkey & Middle East

Automotive Automotive aftermarket Conversion is **Accelerating**



Turkey's automotive aftermarket has gone through a significant transformation in recent years, developing in parallel with the main industry. The automotive sector crossed a new threshold in 2025 with \$41.5 billion in exports. One of the most important drivers of this growth is the level the supplier industry has reached, together with the aftermarket. For example, today the supplier industry accounts for around 40 percent of automotive exports on average.

You operate in different geographies. In what ways does Turkey's aftermarket stand out compared with global markets?

Turkey's automotive aftermarket has some strong dynamics that clearly differentiate it from global markets. First, the market's vibrancy is striking. The macro balance between new-car sales and the used market keeps demand for aftermarket services steady. By the end of 2025, used-car transactions in Turkey exceeded 7 million, while new-car sales are above the 1 million mark. Second, the composition of the vehicle fleet. The higher average vehicle age of 14 compared with Europe increases maintenance and repair volume, while at the same time the rapid penetration of electric and hybrid vehicles forces the service ecosystem to manage two different trends concurrently. Turkey currently ranks fourth in Europe for electric vehicle sales; in short, it is one of the markets that has quickly internalized the electrification transition. The third difference is the agility of consumer behavior. Demand can change rapidly depending on conditions, which requires aftermarket players to be flexible and quick to act.



The Turkish automotive aftermarket market has some strong dynamics that clearly set it apart from global markets. First, the market's vitality is striking. The macro balance between new-car sales and the used-car market keeps demand for automotive aftermarket services

Arda ARSLAN
BOSCH

How do you evaluate the development of Turkey's automotive aftermarket in recent years? What do you see as the most critical opportunities and risks going forward?

We cannot ignore that the mobility sector worldwide is undergoing a major transformation. While this change affects many factors, it also contains opportunities. At Bosch, we develop and provide the technologies and services that drive this transformation. In recent years, the shift related to electric vehicles has been at the forefront. The electric vehicle market is growing rapidly; in the first 11 months of 2025 the market expanded by roughly 20 percent, reaching about 170,000 vehicles. Our country has become the fourth-largest market in Europe for electric vehicle sales. That creates a need for the service ecosystem to transition to an entirely new technology. On the other hand, the aging vehicle fleet is a natural indicator of ongoing demand for maintenance and repair services. Indeed, when we consider motorcycles, passenger cars and light commercial vehicles, our 33.6 million-vehicle fleet has an average age of 14.



Bosch sustainably increases its partners' efficiency through digitalization and a human-centered development approach.

This dynamic structure is what makes Turkey a strategic hub in the automotive aftermarket. At Bosch, we don't ignore that potential; we continue to add value to Turkey's mobility ecosystem with comprehensive solutions ranging from spare parts and service equipment to training and digital services.

Bosch Car Service Turkey is one of the sector's most competent chains, with a service network certified to TS 12047. Within the framework of the block exemption, what are the biggest advantages this structure provides to consumers and the industry?

The block exemption regulation truly gives consumers freedom of choice. Vehicle owners can now have maintenance done at competent independent workshops even while their warranties remain valid. That's exactly where Bosch Car Service steps in.

The biggest advantage we offer consumers is being able to provide Bosch quality and assurance at prices well below those of authorized dealers, at an accessible level. As of today, we operate in 385 locations across all 81 provinces of Turkey. Thanks to this widespread network, wherever consumers are they can access Bosch Car Service's professional, transparent and affordable services.

The benefit we bring to the industry is raising standards: the TS 12047 certificate verifies that a service meets certain standards—from technical equipment and staff competence to customer satisfaction and environmental management. Through our Bosch Car Service network we are spreading these standards and institutionalizing practices that often go beyond the standard.

Efficiency is critical for sustainable growth in the aftermarket. As Bosch, what approach do you take to inventory management, workforce efficiency and process optimization?

Efficiency is a fundamental determinant of competitiveness today. At Bosch we base our approach on two pillars. First, process optimization supported by digital tools. With our advanced service software and integrated ordering systems tied to wholesaler B2B platforms, we make our partners' operational processes faster, more efficient and less burdensome. Second, investment in people. Through the Bosch Automotive Training Center we provide professionals and future professionals with comprehensive training in both technical and non-technical areas. This enables us to continuously improve both technology adoption and service quality.

How do you evaluate the current state of networked chain services in Turkey? Do you think the sector has reached sufficient maturity, or is there still a long way to go?

We've come a long way, but we are aware there's still work to be done. Serving all 81 provinces with 385 locations is an important threshold in terms of coverage and accessibility. But the real challenge is continuously advancing the quality standards and trust we've established alongside that reach. Chain service networks bring great advantages in terms of standardization and trust. When consumers see a brand, they know what to expect.

How does the Bosch Car Service model position itself between dependent (authorized) and independent service models?

Bosch Car Service offers a hybrid positioning that combines the advantages of both models. We are independent, meaning we can service any make of vehicle and our prices remain accessible. At the same time we operate with the standards, technology and assurance of a global brand like Bosch. Moreover, Bosch Car Service benefits from over a century of experience. This deep heritage provides

accumulated know-how and resources that enable strong standardization.

In short, we bring together the flexibility of independent workshops and the standardization of authorized dealers. That offers consumers a "reliable alternative."

Even though workshops certified to TS 12047 are technically equivalent to authorized services, perception issues sometimes persist in the market. What should industry stakeholders do to change that perception permanently?

You've raised a very important point. Changing perception is everyone's responsibility.

First, consumer education is essential. People need to understand what the block exemption means, what TS 12047 signifies, and which standards a workshop must meet for owners to safely entrust their cars outside authorized dealers. Industry associations, the media and manufacturers have a major role to play in this. Second, as service networks we must increase our transparency. We need to give consumers assurance about the authenticity of parts used, the correctness of performed work, and fairness in pricing. Bosch Car Service already operates on that basis.

Digitalization and artificial intelligence are advancing rapidly in the automotive sector. How does Bosch assess this transformation in terms of integration into field operations and workshops, and its potential impact on the workforce?

We evaluate this transformation in the field along three dimensions. First, diagnostics. AI-supported diagnostic systems will speed up fault detection and increase its accuracy. Second, predictive maintenance. By analyzing vehicle data we will be able to predict when a part is likely to fail, allowing us to notify customers in advance and enable planned maintenance. Third, customer experience. By making our digital platforms—like "My Service is Bosch Car Service"—smarter, we will offer customers more personalized services.



Firuzan İŞCAN
General Manager of HDI
Insurance

Cooperation Required in Damage Repair

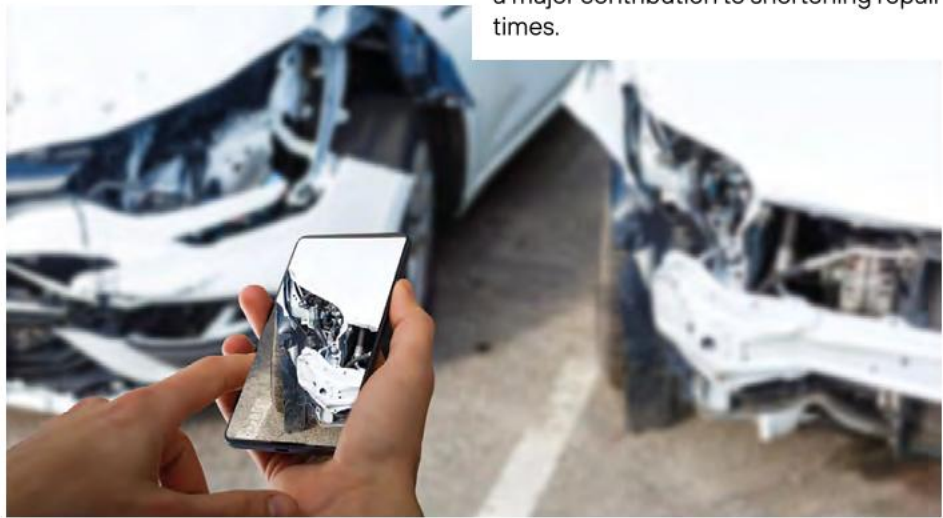
Spare parts account for roughly 60–70% of the cost in damage files. This share is directly tied to exchange rates and global costs. Rising part prices are pushing the aftermarket toward repair-focused solutions and using alternative parts.

How would you assess access to spare parts in Turkey's damage-repair processes? Does the current aftermarket ecosystem meet needs in terms of part availability, delivery times and quality?

Access to spare parts in Turkey's repair processes has been put to a significant test in recent years, particularly because of global supply-chain disruptions and exchange-rate volatility. The existing ecosystem broadly meets needs; however, there is still room for improvement in delivery times and logistics costs. I believe these processes will run more smoothly as logistics networks are managed more efficiently and digitally.

How critical is cooperation between the insurance sector and the spare-parts and service side for the healthy operation of claims processes? In which areas do you see opportunities for strengthening that cooperation?

Claims handling is a multi-stakeholder operational chain involving the insurer, the spare-parts supplier, authorized/independent repair shops and the adjuster. A disruption in any link of this chain can affect the whole process. Alignment between insurers, spare-part suppliers and service providers is one of the most critical elements of claims management. The stronger this cooperation, the higher customer satisfaction will be. In particular, improving data sharing and system-to-system integration would make a major contribution to shortening repair times.



Locally produced parts have significant potential in terms of cost advantages, shorter procurement times, and reduced dependence on foreign sources.

When insurers source spare parts, could they prioritize domestically produced parts where availability allows? How do you evaluate the effects of this approach on cost, quality and service times?

Domestic parts have significant potential in terms of cost advantage, shorter procurement times and reduced foreign dependency. Of course, the main criterion must be maintaining quality standards. As long as the necessary standards are met, prioritizing domestic production would have positive outcomes for both cost balance and the national economy.

What is your perspective on equivalent spare parts? How would you define the role of these parts in the aftermarket in terms of insured satisfaction, repair quality and cost balance?

An equivalent part is an important element in the industry that provides a balance between cost and quality. The definition of an equivalent part is given in the Communiqué on Block Exemption for Vertical Agreements in the Motor Vehicles Sector as follows: "a part produced to replace the original parts used in the assembly of a motor vehicle; the part whose suitability in terms of criteria such as mass, dimensions, material and functionality has been determined by comparing it with the original part according to test and inspection methods specified within the relevant legislation, and whose conformity has been certified by an accredited body." According to this definition, the concept of equivalent refers to an economic balance achieved without compromising quality and safety. When used to the right standards, it establishes a healthy balance between insured satisfaction and repair quality and helps keep premiums affordable.

What steps do you think are necessary on trust, quality and transparency for the wider adoption of equivalent parts?

Wider adoption of equivalent parts is possible primarily by ensuring production to the standards specified in the relevant communiqué, followed by correct information and trust-building. We need to communicate to our policyholders that this approach is not merely a cost choice; it also plays an important role for the sustainability of the system. Clearly defining quality standards for these parts and explicitly securing warranty conditions will help strengthen trust. Otherwise, cost increases tied to foreign exchange can put pressure on the insurance system.

Can you outline the general share of spare part costs within claims files in Turkey? How do changes in these ratios affect the aftermarket?

Approximately 60–70% of the cost in claims files consists of spare parts. This ratio is directly related to the exchange rate and global costs. Increases in part costs drive the aftermarket toward repair-focused solutions and the use of alternative parts.

How does the distribution of claims files between comprehensive (kasko) and third-party (traffic) policies reflect on part preferences? How important is this distribution for the aftermarket?

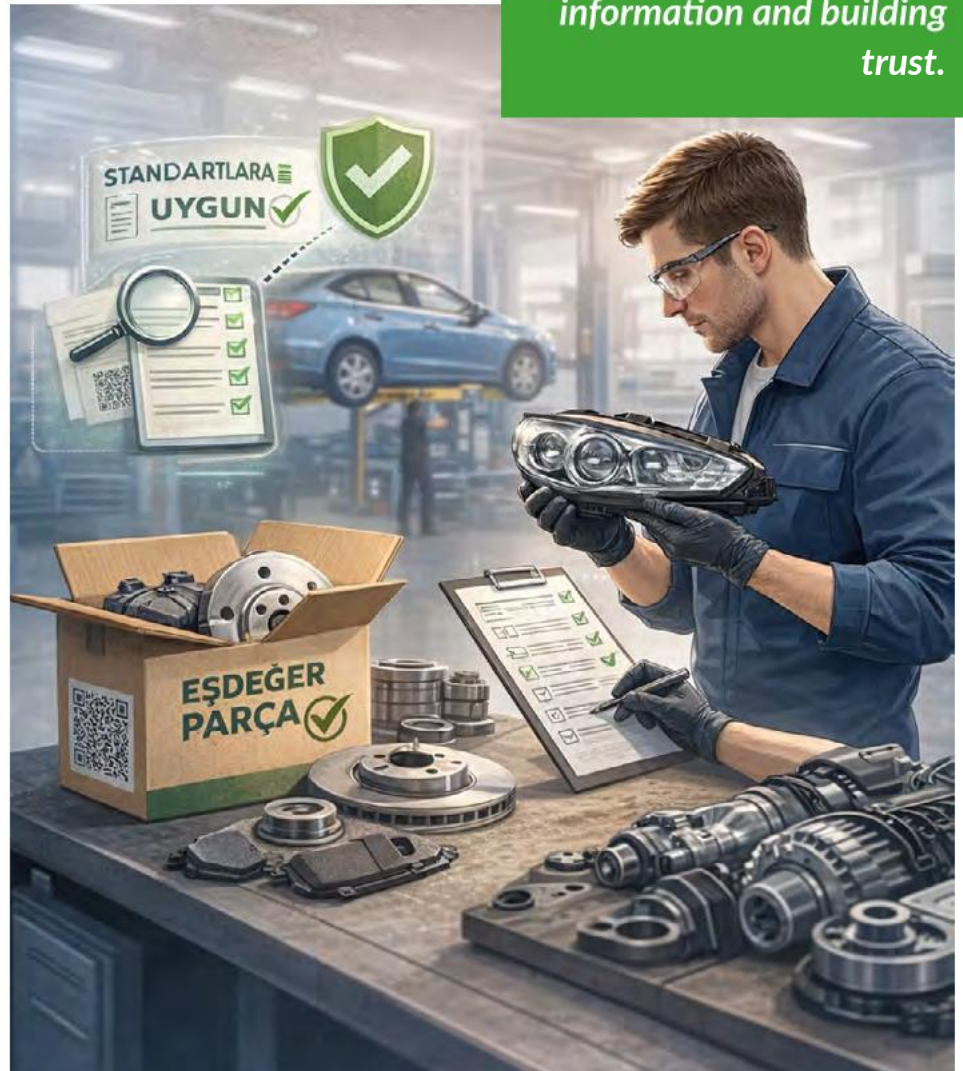
Because of customer preferences and the structure of coverages in comprehensive policies, there is a higher tendency to use original parts. In traffic insurance, the use of equivalent parts is more common within the limits of regulations. This distribution plays a decisive role for the aftermarket in terms of stock planning and operations management.

Searching parts by chassis number (VIN) is crucial to getting the right part; however, in Turkey accessing this information and matching parts can sometimes be difficult in practice. In many European countries these processes can be handled via the license plate. Do you think a similar infrastructure could be established in Turkey? How would such a system contribute to the aftermarket and claims processes?

Matching the right part to the right vehicle is one of the most critical steps in claims management. At HDI Sigorta we work with a Europe-based solution partner in this area and have achieved a high accuracy rate in the passenger car/light commercial vehicle group. Although the process is different for heavy vehicles, this experience on the car side shows that a similar infrastructure is feasible in Turkey. Such a system could reduce incorrect part orders, increase operational efficiency and shorten repair times.



The widespread use of equivalent parts is possible first by ensuring production to the standards specified in the relevant regulation, and then by providing accurate information and building trust.



Andy HAMILTON
LKQ Europe President
and Chief Executive
Officer

EV Conversion Redefines the Aftermarket



EV growth is accelerating – how is electrification transforming the independent aftermarket?

Electrification is reshaping mobility, but it is not happening at the same pace everywhere. EV adoption varies significantly across European markets, and workshops will continue servicing a mixed vehicle parc for many years to come.

At the same time, the overall car parc in many markets is ageing, with vehicles being kept on the road longer. That combination means independent workshops need broader capabilities than ever before – spanning conventional repair, new electrified systems, and increasingly connected and software-defined vehicles.

For independent workshops, technological change brings real opportunity, but also new complexity, new investment requirements, and new potential points of control for vehicle manufacturers.

At LKQ Europe, our mission is to protect and strengthen the independent aftermarket so it can continue to thrive in this evolving landscape. We build capability and competitiveness through training, workshop concepts, an unmatched (and growing) range of original equipment, aftermarket, approved remanufactured and quality-checked recycled parts, and business solutions that help customers adapt as technology advances.

And we are committed to defending the right of independent operators to compete fairly and deliver the affordable, high-quality local service motorists rely on.

How is LKQ Europe innovating across the value chain to support electrification, sustainability and affordability?

As the market shifts, new technical challenges are emerging – especially around EV batteries and high-voltage components. In late 2025, we partnered with the UK's leading EV repair specialists to launch LKQ Electriq, offering independent garages and bodyshops a repair-first solution for EV batteries and high-voltage components, backed by specialist expertise and cost-effective outsourced support.

The model is designed to help independent repairers retain customers and say "yes" to complex EV work without prohibitive upfront investment – and to extend EV service lives in the process. The rollout begins in the UK, with ambitions to expand across Europe.

Alongside this, LKQ is expanding circular repair choices through LKQ SYNETIQ, a strategic joint venture combining LKQ's distribution reach and logistics network with SYNETIQ's dismantling, reuse and remanufacturing expertise in the UK. This strengthens access to high-quality recycled parts and supports greater affordability and circularity as the vehicle parc evolves. This initiative is also rolling out in the UK initially, with wider European expansion planned.

What regulatory changes are needed to ensure the independent aftermarket can compete fairly?

Capability and innovation must be matched by fair rules. That is why LKQ Europe engages directly with European institutions – bringing data, evidence and market insight into policy discussions to ensure safety, security and sustainability objectives do not become unintended barriers that restrict independent repair.

Independent operators need workable, non-discriminatory access to vehicles, systems and replacement parts to compete – and consumers need the choice and affordability that competition delivers.

We have campaigned tirelessly on multiple topics including Motor Vehicle Block Exemption – on which the European public consultation closed last summer. Our submission focussed on fairness as we called for the enforcement of equal access to technical and vehicle-generated data, transparent and enforceable warranty rights and freedom to trade in all spare parts. We are hopeful that the Commission will take this into account when policy-making in 2026.

Onur ÖZYAPICI

MANN+HUMMEL Deputy Head of
Automotive Aftermarket (India,
Middle East, Africa and Turkey)



I am Onur Özyapıcı. I have been working in the automotive aftermarket for nearly 20 years. I began my career in Turkey, and my professional journey has taken me to China, India, the Middle East and Africa. Today I serve as Vice President at MANN+HUMMEL, the global leader in filtration, responsible for a broad region covering India, the Middle East and Africa. This experience taught me one thing: titles don't endure—value created in difficult markets does.

In 2020, while managing operations remotely from Shanghai during the pandemic, I realized an important truth: crises are temporary, transformation is permanent. The automotive industry is undergoing a deep shift driven by electrification, digitalization and changing customer expectations. The aftermarket can no longer compete on product availability alone; it must deliver speed, data, accessibility and reliability. Leadership is becoming the ability to build trust amid uncertainty and to prepare organizations for the future.

Each country presented a different test of leadership. Changing conditions demanded different reflexes. In India, price competition required millimeter-precise margin management. The market was growing, but price expectations were falling faster. The lesson I learned there was clear: it's not enough to make sales—you must make profitable sales. In Africa, every sale carried collection and cash-flow risk. Revenue growth alone was not success; collected revenue was. Sustainable growth is impossible without risk management.

In the Middle East, geopolitical fluctuations forced constant plan updates. Courage to revise strategy is part of leadership as much as the ability to make one. In that region, stability means being adaptive, not static.

The common thread in these experiences was this: leadership in tough markets comes not from comfort zones but from navigating uncertainty.

Viewed from abroad, Turkey is seen as a fast, flexible and entrepreneurial market. Turkish managers have a strong reflex for decision-making under uncertainty. But as we approach 2030, speed alone will not be enough. The world now demands more systematic, data-driven and integrated business models. Turkey's manufacturing strength and commercial savvy are a huge advantage, but they need to be supported by robust data infrastructure, analytical discipline and corporate systems.

The next five years will define the new rules of the aftermarket game. The rise of electric vehicles is changing part composition. In industrial segments, total cost of ownership (TCO) is overtaking purchase price as the key consideration. Digital platforms are increasing price transparency. E-commerce and online catalog integrations are becoming standard. Data and analytics will become the most powerful competitive advantage.

Success in the aftermarket after 2030 will require planning with less guesswork and more data, less reactive management and more foresight. It will no longer be only the breadth of a product portfolio that matters, but data quality, integration speed and operational excellence that create differentiation. Winners will compete with systems, not just with price.

Learning and Creating Value Beyond Borders

"Global Perspective on the Turkish
Automotive Replacement Market Heading
into 2030."



*Viewed from abroad,
Turkey is seen as
a fast, flexible and
entrepreneurial
market.*

My message to Turkish managers and companies is clear: strengthen digital discipline while maintaining financial discipline. Complement local strengths with global standards. Support your fast decision-making reflex with data. Aim for sustainable profitability, not just volume. Make your biggest investment in people.

One morning in Shanghai I thought, "The world is shrinking, but responsibility is growing." Now, working in Dubai at the crossroads of different cultures and markets, I believe that even more strongly: it is vision, not geography, that will determine the future.

With its manufacturing capacity, entrepreneurial spirit and human capital, Turkey's automotive aftermarket does not have to remain merely a regional player; with the right strategy, the right data infrastructure and the right leadership it can be a global reference hub. Heading into 2030, the real issue is not crossing borders but being on the side that shapes change.

And our industry is ready for that.



Emre ÖZPEYNİRCİ
Journalist and industry analyst

Scrap incentives are environmentally sound but make the budget balance difficult.

When you think of the independent aftermarket, what picture forms in your mind? How do you assess the current strength of this sector in Turkey and its future potential?

From my perspective there are three main factors when it comes to the independent aftermarket: the age of the vehicle fleet, cost pressures, and supply resilience. Turkey now has a vehicle fleet of more than 30 million and an average vehicle age of roughly 14–15 years. That naturally keeps demand for maintenance, repairs and spare parts consistently strong. High new-car prices and limited access to credit also encourage people to keep their existing cars longer. Structurally, that strengthens the independent aftermarket. Looking ahead, the transformation will move on two axes. First, as electric vehicles become more common, parts composition will change — a shift from mechanical components toward electronic and software-focused parts will accelerate. Second, digitization and e-commerce will make independent distribution channels more transparent and competitive. In short, the independent aftermarket in Turkey will remain strong in the short and medium term. Over the long term, the winners will be the players who invest in technology and strengthen their data and logistics infrastructure.

Looking back over the last 25 years, what do you consider the most critical turning points for Turkey's automotive sector? How should we read where we are today?

There have been three major turning points in Turkish automotive over the past 25 years. The first and most important, in my view, was the post-2001 restructuring. The sector shifted from being dependent on the domestic market to becoming an export-oriented production base. The second was after 2010 — post-global financial crisis — when

European integration deepened and the supply industry became strongly linked into global value chains. The third is the electrification and technology transformation of the last five years. Today the issue is not just producing vehicles but positioning the right technology for the right market. Where we stand now is that Turkey remains a strong manufacturing base, but competition in the new era will not be won by capacity alone; it will be won by technology, flexibility and cost advantage.

How did Turkey's automotive industry transform after the Customs Union Agreement? From today's standpoint, how do you weigh its advantages and disadvantages?

The Customs Union triggered a fundamental transformation in Turkey's automotive industry. It evolved from a structure focused on producing for the domestic market into an integrated, high-quality, regulation-compliant export hub for Europe. Production volumes, model variety and the capabilities of the supply industry all increased markedly. On the plus side, there is duty-free access to the European market, alignment with technical regulations, and a reputation as a reliable production base for global brands. This helped Turkey become one of Europe's important production and export centers. On the downside, Turkey remains outside the decision-making mechanism: it cannot automatically join the EU's free trade agreements, has limited influence over trade policy, and faces uncertainty when Europe launches new industry initiatives like "Made in Europe." That is a structural risk. Today the Customs Union remains a cornerstone of Turkey's automotive industry, but the new challenge is not just integration — it is securing a stronger position at the table. Clearly, updating the Customs Union is necessary.



Turkey has duty-free access to the European market, harmonized technical regulations, and a reputation as a reliable manufacturing base for global brands. As a result, Turkey has become one of Europe's important production and export centers.

Vehicle sales in Turkey have reached record levels over the past three years. Do you think this rise will continue into 2026, or do you see signs of a slowdown?

Yes, vehicle sales saw an extraordinary surge over the past three years. That was driven by pent-up demand, a tendency to protect wealth against inflation, and wider credit availability. But that pace is not permanent. Growth will likely continue in 2026, but with a slowdown. Financing conditions, price levels and the pace of economic growth will be decisive. If credit access remains constrained, the market could settle at a more balanced level. Still, underlying demand for cars in Turkey is structurally strong. As long as a young population, urbanization and mobility needs persist, the vehicle fleet will keep growing — it's just the growth rate that will normalize.

iHow do you assess the number of vehicles per capita in Turkey? Compared with Europe, are we still a market with growth potential, or are we approaching saturation?

The number of vehicles per capita in Turkey is still well below the European average. While Western Europe talks about 550–600 cars per 1,000 people, Turkey is far behind that level. Theoretically, that still implies significant growth potential. But the issue isn't just penetration rates — purchasing power, access to financing and the tax structure are decisive. As long as income growth lags behind vehicle price increases, potential demand will struggle to turn into real demand. So Turkey is not at the saturation point, but the speed of growth depends on economic conditions. The structural potential exists; for sustainable growth you need affordable prices and financing conditions.

Is the long-discussed scrappage incentive really necessary? Given the age of Turkey's vehicle fleet, would such a step be an economically and environmentally sound solution?

A scrappage incentive can be a technically meaningful tool, because Turkey's vehicle fleet is old and older cars tend to have low emissions and safety standards. From an environmental and road-safety perspective, a renewal incentive looks rational. But it's not only about the environment — there's the budget balance to consider. Special consumption tax (ÖTV) and VAT from the automotive sector are critical revenue items for public finances. A broad scrappage incentive could cause serious erosion in tax revenues in the short term. So it's understandable that the Treasury would be cautious. My view is this: instead of a blanket, unlimited scrappage scheme, a targeted and phased model would be better. For example, focusing on high-emission vehicles above a certain age, steering buyers toward electric or low-emission cars, and designing it to be budget-neutral if possible. Otherwise, the incentive may create a temporary surge in demand rather than lasting environmental gains.

If a scrappage law were passed, should the main focus be on removing vehicles from the system or on tightening inspection and enforcement mechanisms? Which approach do you find more rational?

Automatically removing vehicles just because they are old is not always the most rational solution. The key is not

age per se but emissions level, safety condition and technical fitness. If a vehicle is regularly maintained and meets standards, consigning it to scrap solely because of its age may not be economically efficient. Therefore, I find it more rational to tighten inspection and testing mechanisms. Vehicles that genuinely have high emissions or pose safety risks should be taken off the road; others should be allowed to remain in use. Such a model would serve environmental goals without placing a sudden burden on the budget.

There has been a significant rise in the market share of imported cars recently. How do you interpret this? What policies should be followed to protect domestic production and maintain balance?

In my view, adding taxes to increase protectionism is not the solution; instead, strengthen domestic production in the right segments. What's needed is a predictable, long-term industrial policy that encourages production of electric, hybrid and high value-added models in Turkey. Increasing the attractiveness of producing here is more sustainable than restricting competition.

Turkey is integrated with Europe in the automotive sector but also feels the rise of China closely. In light of geopolitical and trade realities, what strategic balance should Turkey seek?

Strategically, it's more rational for Turkey to play a balancing and complementary role rather than take a one-sided position. It should maintain its position as a reliable, regulation-compliant and cost-competitive production base for Europe. At the same time, it could be a hub for Chinese manufacturers seeking access to Europe, offering local production and partnership opportunities. The critical point is that Turkey should not be only an assembly base. It must attract investment in higher value areas like batteries, software, power electronics and supply chain capabilities. Pursuing an industrial policy that preserves geopolitical balance while strengthening technological independence is the best long-term approach.

What do you forecast for the used-car market in 2026? How will this activity affect the spare parts and service sectors?

I don't expect a dramatic contraction in volumes; however, price increases may normalize and demand could become more selective. Affordable, low-mileage

and economical segment vehicles will still turn over quickly. This will have a positive effect on the spare parts and service sectors. As the vehicle fleet ages, maintenance and repair needs grow. As long as the used-car market remains active in 2026, demand in independent service shops and the aftermarket will stay strong. In short, the more active the used-car market, the livelier the service and parts industry will be.



Players that use data, offer fast delivery, and provide transparent pricing will stand out in the market.

If you had to give three concrete pieces of advice to the automotive and aftermarket industry, what would they be?

- 1) Invest in electrification starting today. The number of electric vehicles may still be limited, but the direction is clear. Service providers and suppliers that don't develop technical expertise in batteries, power electronics, software and high-voltage safety will lose their competitiveness within a few years. It's hard to make up for falling behind.
- 2) Put digitalization at the center of your operations. Inventory management, pricing, customer tracking and e-commerce integration are no longer optional but mandatory. Players who work with data and offer fast delivery and transparent pricing will stand out in the market.
- 3) Focus on efficiency instead of margins. Competition is increasing and price pressure will persist. Protecting profitability isn't about raising prices; it's about optimizing logistics, the supply chain and operational costs.

In short: invest in technology, build digital infrastructure and maintain operational discipline. The winners in the new era will be those who are strong in these three areas.



Michael JOHANNES

Deputy Head of Mobility and Logistics at Messe Frankfurt and Brand Manager for Automechanika

automechanika

What Is the Secret of the Automechanika Brand's SUCCESS?

With global standards, a strong network structure, and a market-focused strategy, Automechanika stands out as the benchmark for sustainable success in the automotive aftermarket.



In addition to direct dialogue, we listen closely to our customers through participant and visitor surveys.

The Automechanika brand, which hosts 16 fairs worldwide, currently attracts a total of 23,000 exhibitors and 690,000 trade visitors. What is the secret of Automechanika's success as a fair brand?

Automechanika's success rests on a few key factors. First, we apply the same high standards and consistent quality across all our events worldwide. The concept is developed in Frankfurt and then carefully adapted to each region to ensure a clear product structure and strong brand management everywhere.

Second, our early and strategic international expansion has been very important for us. Since we took Automechanika abroad in 1997, the brand has reached 16 locations across four continents. Over the years we have also built a strong global network of representatives, partners and associations in 140 countries, which has given us deep insight into regional markets and their specific needs.

Finally, alongside direct dialogue, we listen closely to our customers through exhibitor and visitor surveys. This market-focused approach has led to directly addressing customer demands in these regions and to adding new fairs such as Automechanika Baku in March 2027 and Automechanika Jakarta this September.

How do you see the Aftermarket industry positioning itself in the face of global changes such as electrification, digitalization and sustainability?

The automotive aftermarket is undergoing a profound global transformation, although the pace varies by region. Overall it is becoming an innovative, sustainable and digitally connected service sector. With the rise of electromobility, the focus is shifting from traditional mechanical repairs to high-voltage expertise, prompting workshops and suppliers to invest in training, equipment and electric vehicle components. At the same time, digital technologies such as telematics, AI-based diagnostics and online platforms increase efficiency and enable more customer-focused services. New business models are emerging around connected vehicles and data-driven maintenance. Sustainability is also gaining importance, with growing emphasis on remanufactured parts, circular economy concepts and greener workshop operations. Ultimately the aftermarket is positioning itself as a forward-looking mobility service provider that combines technology, sustainability and customer centricity.

How is Automechanika evolving to stay relevant with new mobility ecosystems and business models?

To stay relevant, Automechanika has developed a strategy based on five pillars.

The first pillar is innovation. We provide a dedicated platform for new technologies through formats such as the Innovation Awards, HighTech4Mobility and Innovation4Mobility forums, and dedicated areas for start-ups. The second pillar is sustainability, with a strong focus on the circular economy and remanufacturing, including cooperation with international partners like APRA. Sustainability is reflected both in the fair itself and in the conference program. The third pillar addresses transformation topics such as software-defined vehicles, e-mobility, connectivity, autonomous driving, digitalization, artificial intelligence and e-commerce. As a leading industry platform, we create space for discussion, expert exchange and hands-on experiences related to new technologies. The fourth pillar focuses on education, training and recruitment.



messe frankfurt

Automechanika Academy supports continuous professional development and offers career opportunities for young talents through conferences and training formats. The fifth pillar is networking. Our events — from CEO breakfasts and B2B matchmaking to a variety of networking activities — provide countless opportunities for global industry interaction.

Automechanika Istanbul is proudly celebrating its 25th year this year. From a global perspective, how do you see the strategic importance of the Turkish market and the Istanbul fair within the worldwide Automechanika network?

The 25th anniversary of Automechanika Istanbul underlines the strategic importance of both the Turkish market and the Istanbul fair within the global Automechanika network. Turkey is an important automotive production and export hub with a strong supplier base and close ties to Europe, which naturally creates considerable momentum in the aftermarket. Istanbul plays a unique role as an intercontinental trade platform, acting as a bridge between Europe, the Middle East, North Africa and Central Asia. This makes the fair much more than

a national event; it serves as a regional gateway where international manufacturers, distributors and buyers come together to form partnerships and develop new business across multiple markets simultaneously. Within the Automechanika portfolio, Istanbul stands out as a high-impact sourcing and networking center. It connects global supply chains, supports diversification strategies, and reflects the real-world complexity of rapidly evolving aftermarket dynamics — from traditional drivetrains to electrification and digital workshop solutions. In this respect, Automechanika Istanbul is not only a strong regional event but also a strategic pillar of the global network that strengthens access, resilience and relevance across interconnected growth regions.

Looking ahead to the next ten years, what is your ultimate global vision for the Automechanika brand?

Looking ahead to the next ten years, our vision is to further strengthen Automechanika as the leading global platform for the automotive aftermarket and the broader mobility ecosystem. It needs to be more than a portfolio of trade fairs

for us. We are working to make it a year-round global network that connects markets, drives innovation and supports sustainable growth. Our focus is on staying relevant in a rapidly changing mobility landscape shaped by electrification, digitalization, connectivity and new business models. Automechanika will continue to be the place where established industry leaders, new technology players and startups come together and where these developments take tangible form. At the same time, we aim to combine strong local market focus with the power of a global brand network by facilitating international trade and the exchange of knowledge. Together with roughly 350 colleagues worldwide, we work every day to ensure Automechanika remains the most trusted and forward-looking business platform for the global automotive aftermarket.

The graphic features a dark blue background with several car silhouettes. A central, vibrant, multi-colored energy stream (red, orange, yellow, green, blue) flows vertically, surrounded by glowing blue and white sparks. In the top left, there is a small logo consisting of four colored squares (red, blue, green, yellow) arranged in a larger square. Below it, the text 'auto mechanika' is written in white on a blue rectangular background. In the top right, 'messe frankfurt' is written in white. A large white box on the left contains the text 'Connecting ideas and experts worldwide' in bold, followed by 'All dates and locations: automechanika.com'. A QR code is located in the bottom right corner of the graphic.

auto mechanika

messe frankfurt

Connecting ideas and experts worldwide

All dates and locations: [automechanika.com](https://www.automechanika.com)



Özarslan A. TANGÜN
CEO of Enterprise Türkiye

High Growth Potential in Fleet Leasing

Only about 10% of vehicles used for business purposes in Turkey are financed through operational leasing. In Europe, that figure is around 50–60%.



How do you assess the current size of the fleet-leasing market in Turkey? What are your forecasts for the next five years?

As of the end of 2025, Turkey's operational leasing fleet is roughly 234,000 vehicles and the short-term rental sector is about 138,000 vehicles. The comparison with Europe is striking: only about 10% of business-use vehicles in Turkey are financed through operational leasing, compared with roughly 50–60% in Europe. In short-term rentals, per-capita rental levels are about one-fifth of those in eastern European countries with similar profiles. Also, as one of the world's leading tourism destinations with rising visitor numbers, Turkey has the potential to exceed 100 million tourists, which would significantly support growth in short-term car rental. This gap really highlights how much potential the sector holds. Over the next five years, I expect fleet leasing to regain healthy growth momentum as economic stability strengthens, financing conditions become more predictable, and companies place greater emphasis on capital efficiency.

How are you managing the electrification process? What strategy do you follow for electric and hybrid vehicles?

Electrification is an unavoidable transformation for our industry. But it must be treated not just as an investment in vehicles, but as an end-to-end operational transformation. Electric and hybrid vehicles bring many implications: maintenance and repairs, technical capabilities, spare parts supply and used-vehicle value management, among others. Our strategy is therefore based on working with manufacturer-approved service centers, continuously training our teams, and maintaining a balanced vehicle mix in the fleet. Given current infrastructure conditions, we view hybrids as the most rational interim solution on the road to full electrification.

What is your approach to using equivalent (non-original) parts in fleet operations?

Cost management is essential to our business, but that does not mean compromising safety or quality. We limit the use of equivalent parts to certified, traceable products that meet manufacturer standards. Safety-critical components

and warranty-covered work are always handled in accordance with manufacturer procedures. The balance we strike with insurers and our service network comes into play here. Our goal is to optimize costs while preserving operational uptime and residual values.

Where does sustainability sit in Enterprise's strategy?

Sustainability is not a side issue for us; it's an integral part of our business. Vehicle rental and shared mobility already use resources more efficiently than individual car ownership. We are increasing the share of low-emission vehicles in our fleets, measuring our carbon footprint and taking steps to reduce it. Employee development, occupational health and safety, and ethical governance are also core components of our ESG approach. I see sustainability not only as an environmental responsibility but as a strategic necessity for long-term operational resilience and value creation.



OSS Members Attended the SourcingTaiwan 2025 Taipei Event

OSS members attended Sourcing Taiwan 2025 – Taipei on April 23, 2025, supported by the Taipei Trade Center Istanbul Office. The event offered one-on-one B2B meetings across many areas – including auto parts, automotive electronics, accessories, and electric vehicle charging equipment – giving members the opportunity to communicate directly with Taiwan’s leading manufacturers and explore new business opportunities.



Members who attended the Taipei Ampa Fair held on April 23-26, 2025 had the chance to see the latest industry innovations firsthand.





Satış sonrası temkinli bir sürece girdi

[illegible]

En büyük sorun nakit baskısı

ÜSS Derneğ Başkanı Ali Özçete, "2024 yılında bayırların durumunluk, ne yazık ki 2025'in ilk yarısında da etkisini sürdürdü. Yılın ilk



“pazarın yeniden toparlanacağına yönelik beklentiler güçleniyor” diye konuştu.

Malîyetlerle ilgili ikinci sırada
Ankete katılan öğrencilerin yüzde 26'sı 2025 yılında ilk çeyreğinde göre lise tahdâttan artardı. Öğrenciler yüzde 45,2'si şu konularda domine lise tahdâttan korudu. Bu konularda öğrenciler, lise tahdâttan azaldığı belirtilen üye oranı yüzde 23,8 seviyesinde kaldı. Öğrenciler, 2025'in ikinci çeyreğinde öğrencilerin problemlerinden başlıca yüzde 76,7 ile "Nakit alıcılara sorunlar" olarak belirtildi. "Nakit alıcılara sorunlar" yüzde 68,9 ile ikinci sırada yer aldı. Öğrenciler yüzde 47,9'u ise "İç ve dış kayıplar"ı sektör için en büyük yükü için en altıncı olarak belirttiler. Ancak göre özetimizde de görüldüğü üzere yatırım yapmanın dışında, öğrencilerin düşünce ve fikirlerinin dönemin en büyük seviyesine geçildi. Bir önceki ankette üretici öğrencilerin yüzde 35,7'si yatırım planları, yani ankete bu oran yüzde 15,2'ye düştü.



OSS, Aftermarket Zirvesi'ni ikinci kez düzenliyor

[illegible]

Otomotiv ihracatı 41 milyar dolara koşuyor

O TOMOTIV Satış Soruşturması Ürün ve Hizmetleri Derneği, (OSS) Ticaret Bakanlığı Ömer Bolat'ın da katılımıyla bir istişare toplantısı düzenledi. Toplantıda konuşan Bakan Bolat, "Sektör, geçen yıl 37,2 milyar doların ihracata ulaştı. Geçen yıl 37 milyar doların içindeki 16 milyar dolar yan sanayi'di. Sanayinin sağlığı otomotiv bulunsun Türkiye'deki ya sanayi tedarikçilerin payını da eklediğimizde 24 milyar dolarlık tedarik sanayi, stizlerin eserlerinde. Yani 37'nin 24'ü ağız yukarı 13'e 2'ye geliyor. Bu yıl 40 milyar dolar aşacağız ve inşallah 41'li söylemek nasip olacak. Otomotiv ihracatında 41



Özçete ise 2024 itibarıyla 37,2 milyar dolarlık ihracatla Türkiye'nin ihracat şampiyonu olan otomotiv sektöründeki yedek parça üretiminin payına dikkat çekti. Özçete, şöyle konuştu:

"Genellikle ihracat sıfır araç ihracatıyla özdeşleştirilse de, toplam ihracattaki en büyük paydaşa sahip olan yedek parça ihracatı, asıl şampiyonun bu alan olduğunu açıkça gösteriyor. Bu gerçek, sektörümüzün otomotiv sanayisinin en kritik ve lokomotif unsuru olduğunu kanıtı."

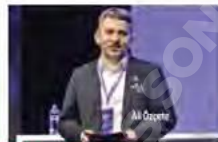


Tedarikçilerin yatırım yapma isteği güçlendi

Ötomotiv Satış
Sonrası Ürün ve
Hizmetleri Derneği'nin
(OSS) 2025 Yılı 3. Çeyrek
Sektörel Değerlendirimi
Anketi'ni açıkladı. Anketle
göre; 2025'in üçüncü
çeyreğinde, 2024'ün aynı
dönemine göre yurt içi
satışlarda dolar bazında
ortalama yüzde 15,1'lik
artış yaşandı. Bir önceki
ankette üretici fiyatların
yüzde 15,2'yi arttığını
planlarıken, yeni ankette
bu oran yüzde 33,7'ye
yükseldi. OSS Derneği
Yönetim Kurulu Başkanı
Ali Özgüte, "Üyelerimizin
yatırım planlarını artırması
sektörünizin yakın vadede
üretim kapasitesini
güçlendire ve rekabet
gücünü artırma isteğini
açıkça ortaya koyuyor"
açıklamasında bulundu.



OSS YK Üyesi Mehmet KARAKOÇ'un konuk olduğu 14.06.2025 Tarihli Bloomberg HT Kanalı E - Rota Programı



Ekonomik savaş planları etkiledi

■ Otomotiv Sığ Sonrası Ürün ve Hizmetleri Derneği (OSS). Aftermarket Zirvesi'nde sektörde bir araya gelindi. Organizasyonda konuşma yapan Y.K. Başkan Ali Özgöte "Güçümüzün bir sonucu olarak karşımıza çıkan ekonomik savaşa sektör olarak bu da etkiyi altına aldık. Artık cari saraşlara geçme yönünde adım atarak, plan yapmak istemiyoruz. Bir uzun vadeli planlar, stratejiler belirleyip yatırımlarımıza buna göre şekillendiği gerçekleri içindekinin kullandık."



OSS Başkanı Ali ÖZÇETE 27.05.2025 tarihli HT Spor'da "Ötospor" programına konuk oldu.

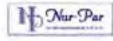
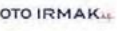
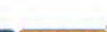
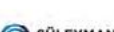


OSS Başkanı Ali ÖZÇETE 03.11.2025 tarihli EKOTÜRK - Sektörel Bakış programına konuk oldu.



MEMBERS

 55 Otomotiv İmalat San. Ve Tic. A.Ş.	 A.B.A. Otomotiv - Ahmet Bulut	 A.Şen Otomotiv Yed. Par. San. Ve Tic. Ltd. Şti.	 Acv Süspansiyon Sistemleri A.Ş.	 Ada Group - Dinamik Otomotiv Gıda Tekstil San. ve Tic. Ltd. Şti.	 Adım Plastik Ve Metal Ürünleri İmt. Ve İhr. Tic. Ltd. Şti.	 Adig Otomotiv İletişim Ve Bilgişim Hüm. San. Ve Tic. Ltd. Şti.	 Affix Otomotiv Organizasyon Sanayi Ticaret Ltd. Şti.	 Ak Bilya Rulman Otom. San. Ve Tic. A.Ş.	 Ak Tuna Otomotiv San. Ve Tic. Ltd. Şti.
 Akkaya Otomotiv Sanayi Ve Ticaret A.Ş.	 Akylol Otomotiv San. Ve Tic. A.Ş.	 Ali Akın Otomotiv Sanayi Ve Ticaret Ltd. Şti.	 Altay Taçit Ve Otomotiv Yed. Par. San. Tic. A.Ş.	 Anis Buji Otom. San. Tic. Ltd. Şti.	 Ardaç Otomotiv San. Ve Tic. A.Ş.	 Arl Otomotiv Elektrik İnşaat San. Ve Tic. Ltd. Şti.	 Arzu Otomotiv Tic. Ltd. Şti.	 Asg Otomotiv San. Ve Tic. A.Ş.	 Asist Otomotiv San. Ve Tic. Ltd. Şti.
 Asometal Otomotiv San. Ve Tic. A.Ş.	 Atak Taçit Yedekleri San. Ve Tic. A.Ş.	 Atılğan Otomotiv Sanayi Servis Hizmetleri İç. Ve Dış. Ticaret A.Ş.	 Avortex Conta Otomotiv San. Tic. Ltd. Şti.	 Aydiyar Yedek Parça San. Ve Tic. A.Ş.	 Ayf Otomotiv Mamulleri San. Tic. Ltd. Şti.	 Ayfar Otomotiv San. Tic. A.Ş.	 Aypar Yedek Parça Ve Otomotiv San. Tic. Ltd. Şti.	 Ayz Yedek Parça Pazarlama Ltd. Şti.	 Artex Metal Otomotiv Tic. Ltd. Şti.
 Bagen Yedek Parça Otomotiv Mak. San. Ve Tic. A.Ş.	 Bakırca Otomotiv San. Ve Tic. A.Ş.	 Bakireir Şahin Otomotiv San. ve Tic. Ltd. Şti.	 Baran Otomotiv San. Tic. Ltd. Şti.	 Başarı Yedek Parça Ve Otomotiv San. Tic. Ltd. Şti.	 Başbuğ Oto Yedek Parça San.İhr. İhr. Ve Tic. A.Ş.	 Batfren Batı Fran Sistemleri Otomotiv Tic. Ve San. A.Ş.	 Beşer Balatacılık San. Ve Tic. A.Ş.	 Betto Japça Arac. Ve Ekipman Yedek Parçaları San. Tic. Ltd. Şti.	 Bf Engino Parts Motor Parçaları Dış. Tic. Ve Paz. San. Ve Tic. Ltd. Şti.
 Btg Otomotiv Su Ve Ziraat Motorlar San. Ve Tic. Ltd.	 Bilen Otomotiv Tic. Ltd. Şti.	 Birlis Garage Otomotiv Ltd. Şti.	 Bosch San. Ve Tic. A.Ş.	 Brio Enerji Ve Otomotiv Sanayi Ve Ticaret A.Ş.	 Cansun Otomotiv San. Ve Dış. Tic. Ltd. Şti.	 Castrol Madeni Yağlar Tic. A.Ş.	 Cehase Hidrolik San. A.Ş.	 Ceylan Motorlu Araçlar Tic. Ve San. A.Ş.	 Cng Dış. Ticaret Ltd. Şti.
 Contitech Lastik San. Ve Tic. A.Ş.	 Çakmak Otomotiv Tic. Ve San. Ltd. Şti.	 Davet Otomotiv Ticaret Sanayi Ltd. Şti.	 De-Ga Otomotiv San. Ve Tic. A.Ş.	 Delta Oto Aksam San. Ve Tic. A.Ş.	 Denge Ticaret Ve Pazarlama Otomotiv A.Ş.	 Ditaş Doğan Yedek Parça İmalat Ve Teknik A.Ş.	 Dinc Oto Yedek Parça Paz. Tic. Ve San. A.Ş.	 Doğan Filtre Otomotiv San. Ve Tic. Ltd. Şti.	 Dönmez Motorlu Araçlar San. Tic. A.Ş.
 Ege Fren San. Ve Tic. A.Ş.	 Ekol Otomotiv San. Ve Tic. A.Ş.	 Ebir Oto Yedek Parça İmalat. Tic. Ltd. Şti.	 Eli Equilibrium Lift System Amortisör A.Ş.	 Emre Kargılı Otomotiv Yedek Parça San. Tic. A.Ş.	 Ertürk Motorlu Araçlar İhr. Ve Tic. Ltd. Şti.	 Esan Akümülatör Ve Malzemeleri San. Tic. A.Ş.	 Eternity Enerji San. Tic. A.Ş.	 Euro Kalıp Otomotiv San. Ve Dış. Tic. Ltd. Şti.	 Eurobump Otomotiv San. Ve Tic. A.Ş.
 Euromaster Lastik Ve Servis Ltd. Şti.	 Exq Otomotiv San. ve Tic. Ltd. Şti.	 Ferdinand Bilstein Tr. Otomotiv Yedek Parça Sanayi Ve Tic. Ltd. Şti.	 Fezdi Arçak Metalurji Makina Otomotiv San. Tic. Ltd. Şti.	 Filter Filtre İnşaat Taahhüt İhr. İhr. San. Tic. Ltd. Şti.	 Forka Otomotiv San. Tic. A.Ş.	 Forpar Otomotiv İthalat İhracat Ve Müşavirlik Ltd. Şti.	 Fortis Dış. Tic. Ltd. Şti.	 Freudenberg Sealing Technologies San. Ve Tic. A.Ş.	 Fuat Oto Yedek Parça San. Ve Tic. Ltd. Şti.
 Gates Güç Aktarım Sistemleri Dağıtım San. Ve Tic. Ltd. Şti.	 Gaysan Otomotiv Tic. San. Ltd. Şti.	 Gaysan Süpaz Gaydan Ve Motor Parçaları San. Tic. Ltd. Şti.	 Genckaya Otomotiv San. Tic. A.Ş.	 Genel Oto Ticaret Ve Sanayi A.Ş.	 Göral Otomotiv Tic. Ve San. A.Ş.	 Grup Oto San. Ve Tic. A.Ş.	 Gt Otomotiv Dış. Tic. A.Ş.	 Güneydin Otomobilcilik San. Tic. Ltd. Şti.	 Güneş Motor Suppları Tic. Ve San. A.Ş.
 Güneyboğazlar Oto Yedek Parça İmt. Paz. San. Ve Tic. A.Ş.	 Gürmak Amortisör Otomotiv San. Ve Tic. A.Ş.	 Hamle Otomotiv San. Ve Tic. A.Ş.	 Hascar Yedek Parça Otomotiv San. Tic. A.Ş.	 Hd Kauçuk Sanayi Ve Ticaret A.Ş.	 Hidirusta Otomotiv A.Ş.	 Himpeks Otomotiv Sanayi Ve Tic. A.Ş.	 Hl Aftermarket Otomotiv Parçaları San. Tic. A.Ş.	 Hoblex Otomotiv A.Ş.	 Işksan Otomotiv Tekn. İng. San. Tic. Ltd. Şti.
 İbraş Kauçuk Otomotiv Yan. San. Ve Tic. A.Ş.	 İkiler Otomotiv Filtre İthalat İhracat San. Ve Tic. A.Ş.	 İncegül Otomotiv Tur. İng. İhr. İhr. San. Tic. Ltd. Şti.	 Intermobil Otomotiv Müşavirlik Ve Ticaret A.Ş.	 İriz Otomotiv San. Tic. Ltd. Şti.	 Kale Balata Otomotiv San. Ve Tic. A.Ş.	 Kale Oto Radyatör San. Ve Tic. A.Ş.	 Kama Motorlu Araçlar Otomotiv San. Ve Tic. A.Ş.	 Kameks Eksantrik Mileri Ve Mak. Par. San. Ve Tic. Ltd. Şti.	 Kaplanlar Dişli Otomotiv San. Tic. Ltd. Şti.
 Karoto Yedek Parça Tic. Ltd. Şti.	 Kaya Otomotiv Ve Yedek Parça San. Tic. A.Ş.	 Kayatel Yaylar İmalat. San. Ve Tic. Ltd. Şti.	 Kaymazlar Motor San. Tic. A.Ş.	 Kcs Dış. Ticaret Müşavirlik San. Tic. Ltd. Şti.	 Kentpar Otomotiv Yedek Parça A.Ş.	 Kırpart Otomotiv Parçaları San. Ve Tic. A.Ş.	 Kitamak Otomotiv Yedek Parça San. Ve Tic. A.Ş.	 King Motor Yatakları San. Ve Tic. Ltd. Şti.	 Klf Otomotiv Mak. San. Ve Tic. Ltd. Şti.
 Khorr-Bremse Ticari Araç Fren Sistemleri Ltd. Şti.	 Kolaş Motor A.Ş.	 Kolayparça Otomotiv A.Ş.	 Kyb Europe	 Lepar Otomotiv San. Ve Tic. Ltd. Şti.	 Lubrica Petrol Kimya A.Ş.	 Lucas Elektrik San. Ve Tic. A.Ş.	 Mahle Motor Parçaları San. Ve Tic. A.Ş.	 Mann-Hummel Filtre San. Ltd. Şti.	 Ma-Pa Makina Parçaları Endüstri A.Ş.
 Marelli Aftermarket Italy S.p.A.	 Martaş Otomotiv Yedek Parça Ticaret Ve Sanayi A.Ş.	 Maspar Ticaret - Süleyman İkinci	 Mavikent Otomotiv San. Ve Taçit Mak. Ltd. Şti.	 Maysan Mando Otomotiv Parçaları San. Tic. A.Ş.	 Mega-Tek Otomotiv Ltd. Şti.	 Meha Automotive	 Mehmet Eren Otomotiv Tekstil San. Ve Tic. Ltd. Şti.	 Mercanlar Otomotiv Tic. A.Ş.	 Merkez Otomotiv Ticaret A.Ş.
 Mesay Otomotiv San. Ve Tic. A.Ş.	 Mest Otomotiv İhr. İhr. Ve Paz. Ltd. Şti.	 Meydan Group Otomotiv San. A.Ş.	 Miba Grup Otomotiv A.Ş.	 Mita Kalıp Ve Döküm Sanayi A.Ş.	 Morel Ekspert Otomotiv A.Ş.	 Motor Aşın Otomotiv Bilgisayar San. Tic. A.Ş.	 Mrk Otomotiv San. Tic. Ltd. Şti.	 Mob Automotive Yedek Parça San. Ve Tic. A.Ş.	 Murat Otomotiv Tic. Ltd. Şti.

 MYM Endüstri San. Tic. A.Ş.	 Neko Otomotiv Ltd. Şti.	 Nitterra Emek Ombi Merkezi Almanya İstanbul Merkez Subesi	 Nomad Otomotiv Yedek Parça Dağıtım Tic. Ltd. Şti.	 Norm Elektronik Sanayi Ve Ticaret A.Ş.	 Nortek İç Mek. Yed. Par. San. Ve Tic. Ltd. Şti.	 Nrf Turkey Otomotiv Tic. A.Ş.	 Ntn Europe	 Nur-Par Oto Yedek Parça Paz. San. Ve Tic. Ltd. Şti.	 Obis Dağıtım A.Ş.
 Ofaş Tekstil Metal Makina San. Tic. Ltd. Şti.	 Okutgen Otomotiv San. Tic. Ltd. Şti.	 Om Otomotiv Pet. İnc. San. Tic. Ltd. Şti.	 Onper Otomotiv San. Tic. Ltd. Şti.	 Optibelt Güç Aktarma Ekipmanları San. Ve Tic. A.Ş.	 Optimal İstanbul Yedek Parça Otomotiv San. Tic. Ltd. Şti.	 Orbis Otomotiv Dağıtım Tic. Ltd. Şti.	 Organo Otomotiv San. Tic. A.Ş.	 Orjin Otomotiv San. Ve Tic. A.Ş.	 Oskim Otomotiv San. Ve Tic. A.Ş.
 Osram Teknolojileri Tic. A.Ş.	 Oto Bilya Otomotiv İnşaat Tekstil Oda Ve Hizmet San. Tic. Ltd. Şti.	 Oto Consta San. Ve Tic. Ltd. Şti.	 Oto Doğu Tic. Ve San. A.Ş.	 Oto İrmak Motorlu Araçlar Tic. Ve San. A.Ş.	 Oto İsmail Otomotiv San. Ve Tic. Ltd. Şti.	 Oto Rulman Tic. Ve San. A.Ş.	 Oto Sesli Yed. Par. Ser. Bek. Hiz. San. Ve Tic. Ltd. Şti.	 Otodevi Otomotiv Perakende Hizmetleri Ltd. Şti.	 Otokam Otomotiv Dağıtım Tic. Ltd. Şti.
 Otokoç Otomotiv Tic. Ve San. A.Ş.	 Otomarmara Otomotiv İnc. Oda Tekst. San. Tic. Ltd. Şti.	 Oysan Otomotiv Keçe Pazarlama San. Ve Tic. Ltd. Şti.	 Oytaş Okutgen Yedek Parçacılık Tic. Ve San. A.Ş.	 Örükçülüğü Motorlu Araçlar Ltd. Şti.	 Özas Otomotiv San. Ve Tic. Ltd. Şti.	 Özçete Otomotiv A.Ş.	 Öznur Oto Otomotiv San. Ve Tic. Ltd. Şti.	 Parbulu Otomotiv Parça Sanayi Ve Ticaret A.Ş.	 Phinia Delphi Turkey Otomotiv Sistemleri San. Tic. A.Ş.
 Plastech Otomotiv San. Ve Tic. Ltd. Şti.	 Remar Otomotiv Tic. İth. İhr. A.Ş.	 Ren-Par Otomotiv San. Ve Tic. Ltd. Şti.	 Resco Otomobil Parçaları Ve Kauçuk End. Üretim Ve Tic. Ltd. Şti.	 Roko Otomotiv Yapı San. Ve Tic. Ltd. Şti.	 Rotaş Oto Tic. A.Ş.	 Rotweiss Otomotiv İth. İhr. San. Ve Tic. A.Ş.	 Rulman Tic. İnc. San. Ltd. Şti.	 Sandık Yedek Parça A.Ş.	 Sardec Otomotiv San. İth. İhr. Ve Tic. A.Ş.
 Schaeffler Turkey Endüstri Ve Otomotiv Tic. Ltd. Şti.	 Seda Makina Otomotiv San. Ve Tic. Şti.	 Sel Dağıtım Ve Kimya San. A.Ş.	 Seyidoğlu Otomotiv Tamir Bakım Ve Park İş. Müş. Hizmetleri A.Ş.	 Sio Automotive Taahhüt Yedek Parça Sanayi Ve Ticaret A.Ş.	 Sirkar Endüstriyel Güç Aktarm Ve Otomotiv A.Ş.	 Sincanlı Oto Ve Traktör Gereçleri Tic. San. A.Ş.	 Sismak Otomotiv Sanayi Ve Ticaret A.Ş.	 Sistemparts Otomotiv İth. İhr. San. Ve Tic. Ltd. Şti.	 SKF Türk Sanayi Ve Ticaret Ltd. Şti.
 SKT Yedek Parça Ve Makina San. Ve Tic. A.Ş.	 Sodisan Standart Oto Ölçme San. Tic. A.Ş.	 Srp Saldırı Otomotiv A.Ş.	 Srt Dijital San. A.Ş.	 Sty Otomotiv Ürünleri San. Ve Tic. A.Ş.	 Supar Süpürge Ve Parça Sanayi Ticaret A.Ş.	 Supsan Motor Süpürge San. Ve Tic. A.Ş.	 Süleyman Otomotiv Ticaret Ve Sanayi Limited Şirketi	 Şah Hortum İçik İnşaat Mobilya San. Tic. A.Ş.	 Şahin Motor Yatakları San. Ve Tic. A.Ş.
 Şampiyon Filtre Pazarlama Tic. Ve San. A.Ş.	 Şener Oto Yedek Parça San. Ve Tic. A.Ş.	 Şükrişli Filtre Oto. Pet. Ür. İnc. San. Tic. Ltd. Şti.	 Tag Grup Otomotiv San. Dağıtım Tic. Ltd. Şti.	 Taksim Grup Dağıtım Ve Otomotiv San. A.Ş.	 Tatcom Otomotiv Sanayi Ve Ticaret A.Ş.	 Tekno Telematik Otomotiv Otomasyon Ltd. Şti.	 Teknorot Otomotiv Ürünleri San. Tic. A.Ş.	 Tirsan Kardan San. Ve Tic. A.Ş.	 Tok Otomotiv San. Ve Tic. A.Ş.
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 Yavuzsan Otomotiv San. Ve Tic. A.Ş.	 Yenimak Otomotiv Sanayi İç. Ve Dağıtım Ticaret A.Ş.	 Yükseloğlu Filtre Otomotiv Pazarlama San. Tic. Ltd. Şti.	 ZF Services Türk Sanayi Ve Ticaret A.Ş.						

Participating Members

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