



AFTERMARKET

panorama

FROST & SULLIVAN

INDUSTRY RESEARCH REPORT 2025

THE CURRENT STATE,
TRENDS AND FUTURE OF
TÜRKİYE'S AUTOMOTIVE
AFTERMARKET

2025 MARKET SIZE
USD 10.2 BILLION

31 YEARS
**WE HAVE BEEN
STRONGER TOGETHER**



THE OSS
ASSOCIATION HELD
ITS 2026 ORDINARY
ADMINISTRATIVE AND
FINANCIAL GENERAL
ASSEMBLY

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THE TURKISH
AUTOMOTIVE SUPPLY
INDUSTRY AT THE
HEART OF GLOBAL
TRANSFORMATION

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Chairman of the Board of
the Automotive Industry
Exporters' Association (OİB)

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THE INDEPENDENT
AFTERMARKET
DEPENDS ON
PRESERVING
COMPETITION

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Building the Future of the Automotive Aftermarket Together

Dear Industry Stakeholders,

As OSS Association, we are delighted to reconnect with you through the second issue of our magazine. In this edition, we assess not only the latest developments in our industry but also the transformations that will shape its future.

This year, we took great pride in presenting the second edition of our Sector Research Report, one of the most significant initiatives undertaken on behalf of our industry, to the public. Our Sector Research is not merely a study that captures the current state of the industry; it is also a strategic roadmap outlining its future vision. According to the findings of the research, Türkiye's automotive aftermarket, valued at USD 8.8 billion in 2023, reached USD 10.2 billion by the end of 2025. Over the next five years, the market is expected to expand to USD 14.4 billion by 2030. This outlook clearly demonstrates that our industry is one of the most important investment areas not only today but also for the future.

At a time when global economic growth is slowing and high inflation, limited access to financing and geopolitical risks are challenging economies worldwide, the automotive aftermarket has once again demonstrated its resilience. According to data from the Uludağ Automotive Industry Exporters' Association (OİB), Türkiye's automotive industry exports increased by 4.3% in the first six months of 2026, reaching USD 20.8 billion, while automotive supply industry exports alone rose to USD 8.1 billion. In June, supply industry exports increased by 18% year on year to USD 1.39 billion. Despite fluctuations in the automotive manufacturing industry, these figures clearly highlight the aftermarket's production capacity, export capabilities and strategic contribution to the national economy.

Meanwhile, the transition to electric vehicles is no longer a matter for the future; it has become a reality of today. With the number of electric vehicles on Türkiye's roads approaching half a million, a new era is also beginning for the independent aftermarket. Although we anticipate that significant investment momentum will emerge once the electric vehicle parc reaches approximately one million units, the preparations undertaken today will determine tomorrow's competitive advantage in sustainability. We firmly believe that our industry must begin investing in this transformation now.

Another notable development in aftermarket services is the rise of service chains. We observe that service chains are accounting for an increasingly larger share of maintenance operations for vehicles under warranty. Furthermore, I believe that independent service providers operating within a corporate structure, delivering services in line with manufacturer standards and complying with the TS 12047 standard—the organisations referred to in our industry as "service chains"—will become a key driver of growth in the coming period. Supporting and strengthening this segment will take our industry to a considerably more advanced level.

For our distribution sector, fuel expenditure—one of its most significant cost items—is once again coming under pressure due to geopolitical developments. Events surrounding the Strait of Hormuz, in particular, pose a substantial risk of increasing logistics costs. However, the other side of the coin presents an important opportunity. Due to the uncertainties in the Middle East, we are observing that the region's production and supply requirements are increasingly being directed towards Türkiye. I believe this development will create new market opportunities for our exporters.

Today, more than ever, we need unity, collective wisdom and a visionary perspective. As OSS Association, we will continue with determination to lead every project that contributes to the advancement of our industry, represent the voice of our members and work towards the sustainable growth of the automotive aftermarket ecosystem.

I would like to take this opportunity to express my sincere gratitude to our columnists, who contributed their valuable insights and analyses to the preparation of this magazine; to our solution partners, whose support helped bring this publication to life; to our association team, who worked with great dedication throughout the editorial process; and to everyone who contributed.

As OSS Association, we will continue with determination to develop projects that guide the progress of our industry, create value for our members and serve as the collective voice of the automotive aftermarket.

Yours sincerely,



Ali Özçete

Chairman of the Board OSS Association

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member of FIGIEFA (International Federation of Automotive
Aftermarket Distributors).

Orçun İSTANBULLUOĞLU
OSS General Coordinator



Reading the Future, Understanding Change



Following the publication of the first issue of our magazine, the feedback we received from our members, industry representatives and stakeholders demonstrated that our magazine has gained significant recognition as a reliable information-sharing platform for the industry.



Dear Readers,

The automotive aftermarket is undergoing one of the most comprehensive transformations in its history. Electrification, connected vehicle technologies, artificial intelligence applications, data management and sustainability goals are redefining not only products and services but also the way the industry operates. In such a rapidly changing environment, it is more important than ever not merely to follow developments, but to analyse them accurately and anticipate the future from today's perspective.

This was precisely our starting point when preparing the second issue of Aftermarket Panorama. Following our inaugural issue, the feedback we received from our members, industry representatives and stakeholders demonstrated that the magazine had gained meaningful recognition as a reliable information-sharing platform for the industry. This interest also highlighted our sector's need for high-quality content, collective insight and the exchange of experience.

In this issue, we have focused not only on current developments but also on the key topics that will shape our industry in the years ahead. The electric vehicle ecosystem, connected vehicle technologies, digitalisation, data-driven solutions, sustainability and new mobility approaches were among the subjects we prioritised while developing our content.

Through a broad range of content—from international interviews and industry analyses to technical assessments and special reports—we aimed to offer our readers different perspectives on current developments and provide insights that add value to the industry's agenda.

The work we undertake as OSS Association continues to be shaped by this approach. We remain committed to supporting the development of our industry through sector research centred on the shared needs of our members, national and international collaborations, committee activities, training programmes, contributions to regulatory processes and the regular exchange of information. At the same time, by representing our industry on international platforms, particularly across Europe, we closely monitor global developments and continue working without interruption to ensure that our members are prepared for changing conditions.

With this perspective, we position Aftermarket Panorama not merely as a publication reporting current developments, but as a lasting reference source that contributes to the industry's knowledge base, brings together diverse viewpoints and sheds light on the future. In every issue, we will continue to deliver value to our readers through analyses based on reliable data, the experience of industry professionals and insights into international developments.

I would like to thank all our contributing writers, interview guests, members, industry stakeholders, the companies that supported us through their advertisements and my colleagues whose efforts made this issue possible. I now invite you to discover the second issue of our magazine.

Enjoy reading.

OSS Association: From Past to Present

First and foremost, I would like to express how proud I am to have been among the founding members of OSS Association and to have served as Chairman of the Board for two separate terms, from 1997 to 1999 and from 2009 to 2011. Having personally witnessed our Association's continuous growth, institutional development and contributions to the industry over the past thirty years, I am greatly pleased to see the position it has reached today.

During the Association's first decade, our primary objective was to establish a strong institutional structure and expand our membership base. At that time, our membership profile consisted predominantly of OEM suppliers. We therefore worked intensively to broaden this structure by encouraging distributor companies to join the Association. The contributions made to OSS's development by our esteemed former Chairman H. Lütfi Ensari, followed by our dear Aytağ Sakallıoğlu, were exceptionally valuable. I would once again like to thank them on behalf of our industry.

One of OSS's most significant steps towards international engagement was becoming a member of FIGIEFA—the International Federation of Automotive Aftermarket Distributors—in 2000. Following this membership, we successfully hosted FIGIEFA's first congress in Türkiye in Istanbul in May 2009. This event represented a major milestone for our Association and enhanced its standing on the international stage.

With the support and coordination of Hartmut Röhl, President of FIGIEFA at the time, we strengthened the institutional relationship between FIGIEFA and OSS. This enabled us to closely monitor developments affecting the automotive aftermarket during Türkiye's European Union harmonisation process and to share the knowledge and experience gained with manufacturers, distributors, service providers, repair workshops and consumers. These efforts made a significant contribution to raising awareness throughout our industry.

Another major achievement during our term was the implementation of projects supported by European Union funds. In this context, we developed projects in 2009 to raise awareness of the Block Exemption Regulation within the spare parts market. Through the meetings and seminars we organised, we explained the opportunities offered by a competitive market environment to manufacturers, distributors and other industry stakeholders, helping both our manufacturers and distributors prepare for this transformation.

In another important initiative for our industry, we launched the Aftermarket Conference through a partnership between TAYSAD and OSS. This platform brought together parts manufacturers seeking to enter or expand their presence in the aftermarket with representatives of the distribution sector, contributing to the creation of new partnerships and commercial opportunities.

In subsequent years, as distributor companies assumed a more prominent role within the Association, OSS significantly expanded both the scope of its activities and its membership profile. This process began under the chairmanship of our dear Mesut Urgancılar and continued during the term of our dear Ziya Özalp. As a result, our Association evolved into a much stronger and more effective organisation encompassing all stakeholders across the industry.

I would like to extend my sincere gratitude to all our former chairpersons, members of the Board and everyone who contributed to this achievement, and congratulate them on their outstanding accomplishments. By raising the bar for OSS with each successive term, they laid the foundations of the strong institutional structure we have today.

I wholeheartedly believe that our new Chairman of the Board, dear Ali Özçete, and his colleagues will carry OSS to even greater heights with the same dedication, solidarity and vision.

I am fully confident that our Association will continue to be one of the leading organisations guiding the development of the industry, just as it has been until today.

Hayri KAYA
OSS Former President



I firmly believe that our Association will continue to be one of the leading organisations shaping the development of the industry, just as it has been to date.

It is a particular source of pride for me that our Association, founded in 1995 through tremendous effort and sacrifice, first achieved strong representation at the national level, subsequently gained an international identity through its FIGIEFA membership and is now represented on the FIGIEFA Board of Directors. Indeed, taking part in such an important platform—one that contributes to economic and sectoral integration with the European Union—will generate significant benefits not only for OSS, but also for our country and the automotive aftermarket.

This thirty-year success story is the product of collective wisdom, volunteerism, solidarity and a shared passion for the industry. I would like to thank everyone who has contributed to this great family, and I sincerely believe that OSS will continue to achieve new successes in the years ahead with the same determination and vision.

With warm regards and respect,



Through the collaboration between TAYSAD and OSS, we launched the Aftermarket Conference. This platform brought together parts manufacturers seeking to enter or expand their presence in the aftermarket with representatives of the distribution sector, helping to foster new partnerships and business opportunities.

Emirhan SİLAHTAROĞLU
FIGIEFA & OSS Board Member



The EU Data Act and a New Era for the Automotive Aftermarket

As of 12 September 2025, the EU Data Act entered into application. At first glance, it may appear to be a technical regulation. However, from the perspective of the automotive aftermarket, this development carries considerable strategic significance. This is because the issue is no longer limited to parts, servicing or distribution—it now concerns data itself.



The fundamental principle we advocate is clear: data generated by a vehicle should not be controlled solely by manufacturers. The data belongs to the vehicle owner, who should be able to share it with a service provider of their choice. The Data Act establishes a legal framework for precisely this approach.

Data Belongs to the Vehicle Owner

Connected vehicles now generate vast amounts of data, ranging from fault records and driving habits to maintenance requirements and performance information. The fundamental principle that industry representatives and FIGIEFA—the umbrella organisation representing the European automotive aftermarket in Brussels—have long advocated is clear: data generated by a vehicle should not be controlled solely by vehicle manufacturers. The data belongs to the vehicle owner, who should be able to share it with a service provider of their choice. The Data Act establishes a legal framework for precisely this approach.

Under the proposed regulatory framework, vehicle owners will have the right to access data generated by their vehicles directly. They will also be able to share this data with independent repairers and third-party service providers. Data access will be governed by defined standards, creating a more transparent and non-discriminatory framework. This represents a highly significant change for the industry. We are currently witnessing the rapid expansion of connected and software-defined vehicles. Data

has become a fundamental element of competition in areas such as technical diagnostics, remote maintenance, predictive servicing solutions and fleet management. Without access to data, the ability to develop new services remains limited. The regulation is therefore particularly vital for independent repairers.

Consumers Will Benefit from More Competitive Prices and Higher-Quality Services

One of the most significant benefits of the Data Act is that it establishes a more balanced framework by addressing vehicle manufacturers' de facto control over data. Easier access to vehicle data for independent repairers will strengthen competition in the aftermarket, support the development of alternative service models in areas such as insurance and fleet management, and enable innovative digital applications to be introduced more rapidly. The natural outcome for consumers will be greater choice, more competitive prices and higher-quality services.

From Türkiye's perspective, it would not be inaccurate to say that this process will directly affect us due to our strong commerci-

al and regulatory ties with Europe. Every step taken within the European Union sets a precedent for our industry in the medium term. It is therefore essential to monitor these developments closely.

As OSS Association, we are carefully following the process on behalf of our members and continuing our efforts to safeguard the competitive structure of our industry by playing an active role within FIGIEFA.

Data is now described as the new fuel of the automotive industry. Unless fair and equal access to this resource is ensured, it will not be possible to establish a genuinely free and sustainable competitive environment. From this perspective, the Data Act represents an important starting point. However, the implementation process and the way secondary legislation is shaped will be just as decisive as the Act itself.

We regard this development not merely as a regulatory change, but as a strategic achievement for the future of the independent automotive aftermarket ecosystem in the age of digitalisation.

Halit BAŞBUĞ
OSS Board Member



A New Industry-Leading Reference from OSS Association: Strategic Analysis of the Turkish Automotive Aftermarket

The comprehensive study conducted by our Industry Research Commission in collaboration with Frost & Sullivan reveals the scale, transformation and future of the USD 10.2 billion market.



Electric vehicles, ADAS technologies, digitalisation and e-commerce are rapidly reshaping the automotive aftermarket.

As the Turkish Automotive Aftermarket Association (OSS), we have completed our report entitled “Strategic Analysis of the Turkish Automotive Aftermarket 2025,” prepared through the extensive efforts of our Industry Research Commission and with contributions from Frost & Sullivan. Covering the passenger car, light commercial vehicle and medium- and heavy-duty commercial vehicle segments, the study reveals that the Turkish automotive aftermarket reached USD 10.2 billion in 2025 and is expected to grow to USD 14.4 billion by 2030.

As OSS Association, which has represented Türkiye’s automotive aftermarket since 1995, we consider presenting the size, dynamics and future of our industry through reliable data to be one of our highest priorities. By updating the industry research study we first conducted two years ago, we have demonstrated that the market is not only growing but also undergoing a structural transformation. Electric vehicles, ADAS technologies, digitalisation and e-commerce are rapidly reshaping the automotive aftermarket. Without presenting this transformation through current and comprehensive data, it is impossible for our industry to make sound strategic decisions. In response to this need, we established an Industry Research Commission within our Board of Directors and launched this comprehensive strategic analysis.

There are several reasons why we attach such importance to this study. First, it provides a reliable foundation that enables industry participants—from distributors and service providers to parts manufacturers and fleet operators—to develop data-driven business plans. Second, research of this scope, prepared in accordance with international standards, enhances the international visibility of both OSS Association and the industry we represent. It

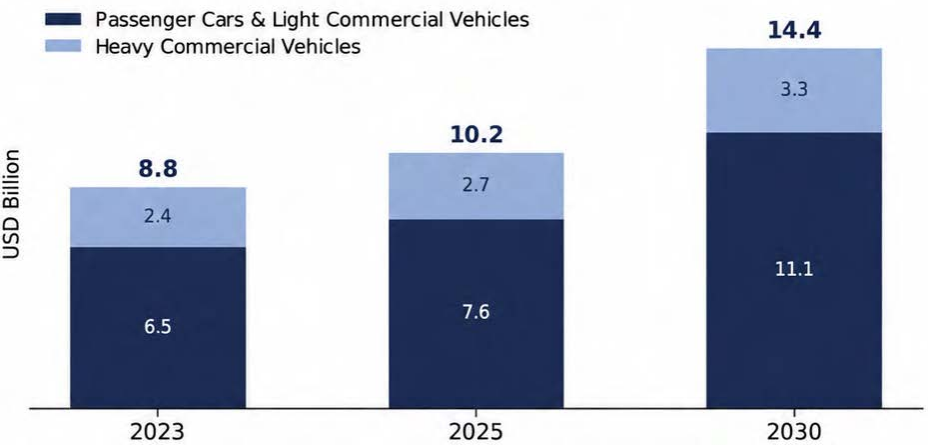


also serves as a reliable reference source for foreign investors and international business partners seeking to assess the Turkish market. Indeed, since its publication, our report has received extensive coverage across numerous national media outlets—an encouraging development in terms of our industry’s visibility. Third, and perhaps most importantly, the research provides an official and measurable data foundation for presenting our industry to external stakeholders and public authorities. It strengthens our position in regulatory processes, in our relations with public institutions and in communicating the industry’s true contribution to the economy.

These findings were achieved through the extensive work of our six-member Industry Research Commission and the methodological contribution of Frost & Sullivan. The Commission structured the study around two main segments: passenger cars and light commercial vehicles, and medium- and heavy-duty commercial vehicles above 3.5 tonnes, including buses, trucks, tractor units and trailers. The research employed a methodology based on vehicle parc size, replacement rates and end-user prices. It combined official data obtained from sources including TurkStat, TAID, TREDER, OYDER, TSB and the IMF with direct interviews conducted with industry participants. We retrospectively analysed the 2022–2024 period, designated 2025 as the base year and developed a five-year projection covering 2026–2030. At this point, we would like to express our sincere gratitude to all Association stakeholders who contributed their knowledge and insights to the completion of the research and devoted their time to one-to-one interviews. This study was shaped to a great extent by their field experience and collaboration.

According to the report, the Turkish automotive aftermarket reached USD 10.2 billion in 2025. Passenger cars and light commercial vehicles accounted for USD 7.6 billion of this total, while heavy-duty commercial vehicles represented USD 2.7 billion. As shown in the accompanying chart, the market is projected to reach USD 14.4 billion by 2030, with the passenger car and light commercial vehicle segment once again expected to account for the majority of this growth.

Türkiye Automotive Aftermarket Size (USD Billion)



Source: Frost & Sullivan, strategic analysis prepared for the OSS Association, 2026.

The “What Has Changed Since the Previous Report?” section of the Passenger Car and Light Commercial Vehicle Report summarises the changes between 2023 and 2025 across all key indicators, bringing together vehicle parc size, electric vehicle penetration, average mileage, the number of accidents and aftermarket revenue in a single table.

The research shows that both segments are growing in the same direction, albeit for different reasons. In the passenger car and light commercial vehicle segment, the share of electric vehicles in total sales increased from 8.5% in 2023 to 28.8% in 2025, while ADAS systems and e-commerce are emerging as new areas of market growth. In the heavy-duty commercial vehicle segment, the impact of electrification remains limited, with electric vehicles accounting for just 0.02% of the vehicle parc. Instead, growth is primarily being driven by an ageing fleet and increasingly complex repairs. The “Total Vehicles in Operation by Age” sections of the reports also visually confirm this distinction:

In both segments, aftermarket revenue increased significantly faster than the vehicle parc, indicating that market growth is being driven more by technological advancement and rising value than by the number of vehicles. This large pool of out-of-warranty vehicles represents strong and sustained demand potential, particularly for independent repairers and the spare parts distribution channel.

Nevertheless, both reports highlight several common structural risks: cost pressures resulting from inflation and the depreciation of the Turkish lira, difficulties in accessing working capital and a shortage of qualified technicians. Experienced technical personnel are moving to higher-paying sectors such as e-commerce and logistics, directly threatening service quality and capacity.

The focus of competition is also shifting. Ensuring uninterrupted vehicle operation is now becoming more important than product availability alone. As a result, OEMs, distributors and service providers are rapidly expanding their logistics networks, mobile service capabilities and extended warranty programmes.



In the coming period, we also plan to conduct more detailed research by product group, enabling us to share the unique dynamics of each category with our industry—from tyres and batteries to lighting and braking systems.

WHAT'S CHANGED COMPARED TO PREVIOUS REPORT

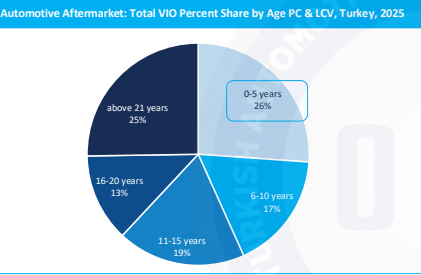
AFTERMARKET REVENUE IS GROWING FASTER THAN PARC GROWTH AS REPAIR EVENTS INCREASINGLY INVOLVE HIGHER-VALUE COMPONENTS.

Key Figures	2023	2025	CAGR 2023-2025
Vehicles in Parc	20,211,006	22,826,024	6.3%
Vehicle Sales	1,232,635	1,368,400	5.4%
Total EV Sales	104,606	393,579	94.0%
Total EV Ratio in Sales	8.5%	28.8%	-
Total EV Parc	303,200	1,070,658	87.9%
Total EV Ratio in Parc	1.5%	4.7%	-
BEV Sales	65,604	189,968	70.2%
BEV Ratio in Sales	5.3%	13.9%	-
BEV Parc	80,636	373,389	115.2%
BEV Ratio in Parc	0.4%	1.6%	-
Average Km's Driven	14,072	14,590	1.8%
Average Age	14.0	14.3	1.1%
Accidents with Vehicle Damage	1,232,957	1,444,026	8.2%
Number of Vehicle Dealers	1,510	1,470	-1.3%
Aftermarket Revenue	\$6,466.0 million	\$7,567.0 million	8.2%

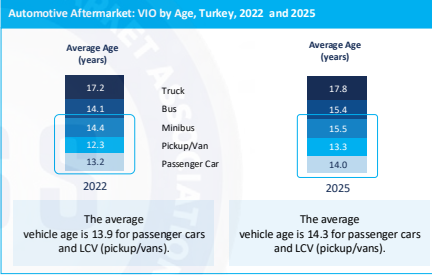
- 1. Vehicle Parc Evolution**
Larger and increasingly electrified vehicle parc
• Total light vehicle parc (6.3% CAGR). Average vehicle age increased from 14.0 to 14.3 years, supporting maintenance demand.
• Average annual mileage increased from 14,072 km to 14,590 km, accelerating wear on key replacement parts.
• BEV parc remains relatively small but is growing significantly faster than the overall vehicle parc.
• BEV adoption is beginning to reshape aftermarket demand:
 • Positive impact: batteries, cooling systems, steering & suspension, wheel bearings, tires.
 • Negative impact: engine components, oil & fluids, starters & alternators, ICE-specific filters.
- 2. Replacement Rate Assumptions**
Replacement cycles increasingly influenced by vehicle technology
• Tire replacement rates increased modestly due to heavier EV vehicles and higher torque output.
• Brake wear growth moderated as regenerative braking reduces friction brake usage in EVs.
• Cooling system replacement demand increased as battery thermal management and heat pump systems become more common.
• Steering & suspension and wheel bearing demand benefited from increasing vehicle weight.
• Collision-related replacement demand accelerated due to an 8.2% CAGR increase in vehicle-damage accidents, significantly outpacing parc growth.
• Traditional ICE categories (oil, filters, engine parts, starters & alternators) continue to grow, but only in line with the ICE parc, resulting in lower long-term growth than full-parc categories.
- 3. Pricing & Value Pool Evolution**
Technology content increasingly drives aftermarket value growth
• USD inflation remained moderate at:
 • 2023: 4.1%
 • 2024: 3.0%
 • 2025: 2.7%
• Revenue growth is increasingly driven by product complexity rather than inflation alone.
Categories experiencing technology-driven ASP growth:
• Collision & Body: ADAS sensors, radar modules, camera integration and calibration requirements.
• Lighting: LED, adaptive LED and matrix lighting systems.
• Batteries: AGM/EFB batteries and increasing EV battery-related components.
• Cooling Systems: battery cooling loops, heat pumps and integrated thermal management systems.
• Steering & Suspension: electronic steering, adaptive damping and sensor-equipped components.
• Brake Parts: electronic parking brake and brake-by-wire technologies.

TOTAL VEHICLES IN OPERATION (PARC) BY AGE 2025

TURKEY'S AGING VEHICLE PARC—DRIVEN BY A HIGH SHARE OF VEHICLES OVER 5 YEARS OLD AND LIMITED NEAR-TERM IMPACT FROM SCRAPPAGE INCENTIVES WILL CONTINUE TO SUSTAIN STRONG AND GROWING DEMAND FOR AFTERMARKET PARTS AND SERVICES.



Note: In this chart, only passenger cars and pickup/vans are included.



Note: Special purpose vehicles and tractors are excluded from this chart.

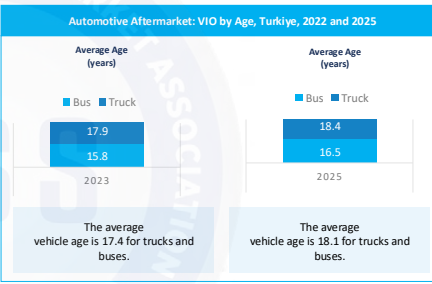
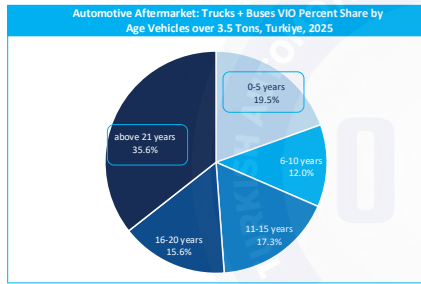
- The vehicle parc is getting older in Turkey and reached 14.3 years on average in 2025 compared to 13.9 in 2022 for light vehicles.
- 74% of the vehicles are above 5 years old, highlighting a potential demand for aftermarket services.
- Minibuses have the oldest (15.5 years on average) parc segment within light vehicles, followed by passenger cars (14.0 years on average) and light commercial vehicles (13.3 on average).
- A scrappage incentive is expected to be introduced in the coming years, targeting vehicles over 21 years old, which currently make up around 25% of the parc. This could reduce the share of these older vehicles by approximately 2–3 percentage points.

Note: *Scrap age scheme is the encouragement of Turkish citizens to purchase a new car or van and scrap an old one.

Source: TÜİK (Turkish Statistical Institute), Frost & Sullivan Analysis

TOTAL VEHICLES IN OPERATION (PARC) BY AGE 2025

TURKEY'S MHCV PARC IS BOTH POLARIZED AND AGING, STRENGTHENING A DUAL-SPEED AFTERMARKET SPLIT BETWEEN OE SERVICING FOR NEWER VEHICLES AND INDEPENDENT SERVICES FOR OLDER ONES.



- As of 2025, vehicles aged 0–5 years and those over 21 years together account for slightly more than 50% of the MHCV parc in Türkiye. This split creates a distinct aftermarket dynamic, where newer vehicles are more likely to rely on OE servicing, vehicles is handled by independent service providers are considerably older.
- Both trucks and buses average age increased in 2025 compared with 2022: buses from 15.4 to 16.5, trucks from 17.8 to 18.4 due to increase in vehicle prices. Hence the overall MHCV average age is also increased from 17.4 to 18.1.

Note: *Scrap age scheme is the encouragement of Turkish citizens to purchase a new car or van and scrap an old one.

Source: TÜİK (Turkish Statistical Institute), Frost & Sullivan Analysis

As OSS Association, we regard this study as a starting point. Our Industry Research Commission aims to update this analysis every two years, making it possible to monitor the industry's size and transformation consistently over time. We also plan to conduct more detailed research by product group in the coming period. This will enable us to share the specific dynamics of each category with our industry, from tyres and batteries to lighting and braking systems.

Our objective is to contribute to the development of a competitive and sustainable automotive aftermarket in which data, education and an appropriate regulatory framework come together. On this occasion, we would once again like to thank our valued colleagues on the Industry Research Commission, as well as all Association stakeholders who contributed their knowledge and experience to the research.

Mads ENGBERG
President of FIGIEFA



The Future of the Independent Aftermarket Depends on Safeguarding Competition

FIGIEFA President Mads Engberg discussed the critical issues shaping the industry's future, from the future of the Motor Vehicle Block Exemption Regulation (MVBER) and access to vehicle data to the impact of electric vehicles on the aftermarket and Türkiye's competitiveness in Europe.



How do you see the future of the Block Exemption Regulation (MVBER) in Europe?

The Block Exemption Regulation is one of the backbones of the independent aftermarket, and it's hard to imagine a functioning market without it. The message I hear from all sides is that the MVBER will be extended beyond 2028, so in my view the most important task is to get it updated to reflect the technological development of the cars.

The MVBER covers among other things the right for OE parts manufacturers to produce to the aftermarket and to brand the parts with their own logo. This is key for the spare parts manufacturers to stay profitable as well as for the independent aftermarket in being able to provide OES parts to the costumers.

Furthermore, the Supplementary Guidelines to the MVBER provides additional examples and explains how for instance the warranty provisions can't be misused by the vehicles manufacturer to keep the independent aftermarket out. In fact the vehicle manufacturer can't make the warranty of the car conditinal on the repair and maintenance of a vehicle within their network or on the use of their own branded spare parts. It's also in the Supplementary Guidelines we find the important passage about technical information which states that vehicle manufacturers may not withhold technical information, which has to be provided to the as to their authorized repairers.

The reason the MVBER is particularly important is that the competition area is the crown jewel of the EU. It is much easier to enforce than most other legislation from the Union and the consequences of breaching competition regulation is severe. For this reason most vehicle manufacturers and importers try to avoid crossing the line which makes the MVBER a very powerful tool.

However, since the MVBER mainly deals with physical spare parts, there is a need to update it to also cover digital spare parts, coding and activation of parts.

In your view, what should be Türkiye's priority actions in this area?

As a candidate member I believe it would be in Türkiye's best interest to follow the lead of the EU and adopt a competition regime which is close to or identical to the MVBER.

What are your views on the use of matching quality spare parts for vehicles that are still under the manufacturer's warranty?

There is no doubt the matching quality spare parts are essential to the independent aftermarket. From the MVBER it is a clear right to use matching quality parts and retain the warranty.

Access to vehicle data has long been at the heart of FIGIEFA's lobbying efforts and can be considered one of its core missions. Could you elaborate on FIGIEFA's current position on this issue and outline the key achievements and milestones it has secured to date?

This is a really big topic and one of the other main priorities of FIGIEFA, but I'll try to make it brief. It is indeed a core mission with ties to the Data Act, the Type Approval Regulation, and the MVBER. The position of FIGIEFA is unchanged. We want the European Commission to present a sector specific legislation (SSL) complementing the Data Act. The Data Act has many of the right provisions but covers all internet connected products from the smart lawnmower and coffee machine to cars. Evidently, there is a huge difference between consumer goods and a vehicle with a lifetime of 15-20 years which undergoes constant repair and maintenance requiring access to the vehicle's technical information and data.

In 2023 we were one step away from getting a legislative proposal on the table, but since it was just 5 months before the European Parliamentary elections, the Commission decided to hold it back. In the meantime, we have secured many of the important parts of the SSL into the recent update to the Type Approval Regulation. In short this came as a resolution to the issue of secure gateways and gives the independent aftermarket the possibility to activate installation codes on spare parts with multi-brand testers and gives full access to OBD information. In exchange the vehicle manufacturers can require a SERMI-light procedure for traceability.



I believe the MVBER should be updated to cover digital spare parts, parts coding procedures and parts activation processes.



Not only electric vehicles but also next-generation connected vehicles are fundamentally transforming the automotive aftermarket. To remain competitive, workshops will need to make substantial investments in new equipment, diagnostic tools and technical infrastructure.



How can access to in-vehicle data and vehicle-generated data be safeguarded for independent operators and workshops?

The next important battle in this regards will be the renewal of the MVBÉR. It will likely lead to some sort of SERMI-like login procedure to avoid unauthorized access to the vehicles and to avoid hacking of the cars.

How do you assess the impact of electric vehicles on the automotive aftermarket?

As Chinese vehicle manufacturers continue to expand across Europe, what impact do you expect this trend to have on the independent automotive aftermarket? How should the sector prepare for this shift?

Chinese vehicles are gaining market shares in Europe because they have exceptional features compared to the price. In my country, Denmark, we have a very high EV share and more than 20 Chinese brands. We have also seen several brands enter the market and leave again, leaving the vehicle owners without a network to solve issues covered by the warranty. We also see the Chinese manufacturers being more focused on selling new cars than securing spare parts for repair and maintenance. This short term focus may be attractive to some but really hurts the resale value of vehicles.

However, the general impact of EV's shouldn't be underestimated. There are significantly fewer moving parts and less maintenance needed. Figures from Norway suggest that the value for the aftermarket is around 70 % of the value of an internal combustion engine vehicle. We also see that ma-

intenance in the first years of the EV-vehicle life is less than for ICE-vehicles, but when repairs are needed, they are more expensive. The main repairs are wheel bearings as the cars with the battery is much heavier and tires must be changed more frequently due to a combination of the weight and the torque of the cars.

In broader terms the introduction of modern connected vehicles has a huge impact on the aftermarket. Workshops need to invest heavily in tools and equipment to stay relevant and able to service the new cars. This is regardless of the powertrain but even more pronounced with EV's which are all equipped with ADAS features.

What are your views on the "Made in EU" regulations?

The "Made in EU" regulations are inherently anti-liberal, but is a reflection of the attempt to save the automotive industry in Europe. An industry which is seen as strategic and essential. From a pure aftermarket perspective, I think the biggest risk of the "Made in EU" regulations is if it spill into the repair market. Meaning that a part "Made in EU", can only be replaced by a spare part made in EU. This would seriously hamper the flexibility and competitiveness of the aftermarket.



One of the key advantages of the Turkish automotive aftermarket is its ability to offer a highly skilled workforce with strong technical expertise at relatively competitive costs.

From FIGIEFA's perspective, how is the Turkish automotive aftermarket perceived within Europe? What would you identify as its main strengths, and which areas should the sector focus on to further enhance its competitiveness and integration with the European aftermarket?

As part of the EU Customs Union, the Turkish automotive aftermarket plays an important role in supplying quality parts at competitive prices. The main strengths are the relatively lower labour cost for highly skilled and technologically advanced workers.

I believe the Turkish automotive sector should play on these strengths by following the trends in vehicle sales in Europe. If the transition towards EVs continues, Türkiye should be able to continue providing high quality spare parts for these vehicles as well.

OSS Association Holds Its 2026 Ordinary Administrative and Financial General Assembly

OSS members gathered for the 2026 Ordinary Administrative and Financial General Assembly. During the meeting, the Association's activities in 2025 were reviewed and its objectives for 2026 were presented. The second Turkish Automotive Aftermarket Industry Research Report, prepared in collaboration with Frost & Sullivan, was also launched.



The Turkish Automotive Aftermarket Association (OSS) held its 2026 Ordinary Administrative and Financial General Assembly on 15 June 2026 at the Wyndham Grand İstanbul Kalamış Marina Hotel, with the participation of its members.

The General Assembly began with an opening address by OSS General Coordinator Orçun İstanbulluoğlu. During the meeting, OSS Secretary General Emirhan Silahtaroglu presented the Association's activities for 2025, while Aziz Kahya, Chairman of the Audit Committee, delivered the audit report.

OSS Chairman of the Board Ali Özçete then outlined the Association's objectives and action plans for 2026, followed by a budget presentation from Treasurer Fatih Odabaşlar.

Following the General Assembly, FixCloud, OSS's new Participating Member, delivered a presentation. As part of the programme, Dr Salih Sami Atılğan, Member of the Board of Directors of the İstanbul Chamber of Commerce, and Halit Başbuğ, Member of the OSS Board of Directors, also addressed the participants and shared their assessments of the industry agenda.



One of the event's highlights was the launch of the second Turkish Automotive Aftermarket Industry Research Report, prepared in collaboration with Frost & Sullivan. Frost & Sullivan Associate Director Mubarak Moosa and Senior Analyst Melek Öztürk presented the study's key findings, offering comprehensive insights into the current state of the Turkish automotive aftermarket and expectations for the coming period ahead.

The OSS 2026 General Assembly concluded with a dinner, during which industry representatives exchanged views and discussed the future of the sector.

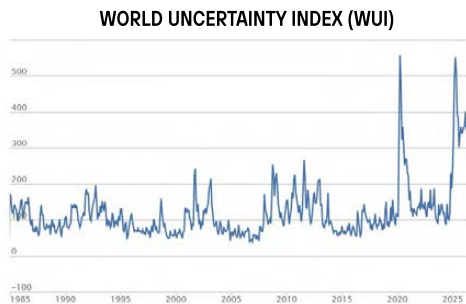


Erkin ŞAHİNÖZ

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

Economic Outlook for Türkiye and the World in the Second Half of 2026

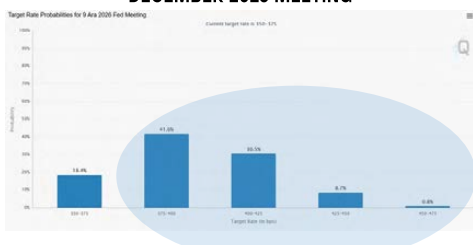
As always, we begin our article with the World Uncertainty Index. The index declined to some extent following the end of the most intense phase of the war and the reopening of the Strait of Hormuz. This development, together with the deterioration in the outlook for the Fed's interest-rate policy—as expectations of rate cuts gave way to expectations of rate increases—triggered a sharp correction in precious-metal prices, particularly gold and silver, within the broader upward trend.



We will begin with the Fed, as the US dollar accounts for approximately 65–70% of the global economy. The appreciation or depreciation of a currency with such substantial influence has major implications for the world economy.

Statements from the new Fed Chair offered no significant indication regarding the direction of monetary policy. Market data suggest a higher probability that the Fed will end the year one or two increments—each equivalent to 0.25 percentage points—above its current rate range of 3.50–3.75%.

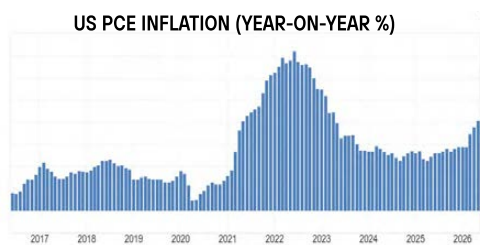
**EXPECTATIONS FOR THE FED'S
DECEMBER 2026 MEETING**



Artificial intelligence investments will exert upward pressure on inflation in the short term. However, in the long term, we will see a significant deflationary trend.

The factor that worsened the interest-rate outlook was the rise in oil prices caused by the war. Alongside higher energy costs, PCE inflation—the Federal Reserve's preferred inflation measure—rose to 4% in the United States. With the US inflation target standing at 2.0–2.5%, the 4.1% inflation rate caused some concern at the Fed and led to a more hawkish tone. However, tougher rhetoric does not necessarily mean that policy actions will also become more aggressive. The Fed operates according to the principle that “90% of central banking is communication and 10% is action,” and frequently manages expectations through its messaging without taking concrete action.

Contrary to market expectations, we anticipate a 0.25-percentage-point interest-rate increase from the Fed during the remainder of the year.



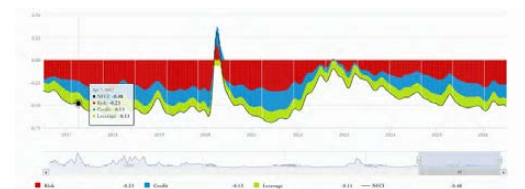
We will discuss the relationship between artificial intelligence and inflation in greater detail in future articles. In the short term, investment in artificial intelligence will exert upward pressure on inflation. Over the long term, however, we expect to see a significant deflationary process.

Having discussed interest-rate expectations for the US dollar, the world's primary reserve currency, let us now focus on global economic activity. We should first assess whether the economic environment and financial conditions are supportive of growth. To do so, it is essential to closely monitor the Chicago Fed's Financial Conditions Index, where a negative reading is considered favourable.

Loose financial conditions mean greater availability of money, lower borrowing costs, an improving demand environment and more favourable liquidity conditions. We can see that financial conditions are currently at their loosest levels since the COVID-19 pandemic. We expect these conditions to continue supporting activity in the real economy and, consequently, sustaining global economic growth.

For months, we have stated that we do not expect a global recession, and we continue to maintain this outlook with strong conviction. The global economy will continue to grow in 2026.

FINANCIAL CONDITIONS INDEX

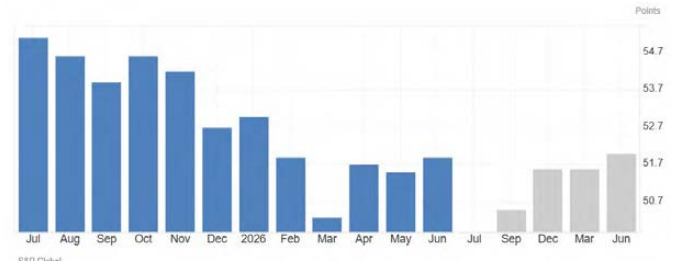




We expect the US labour market to recover and economic growth to accelerate, supported in part by the Fed's interest rate cuts.

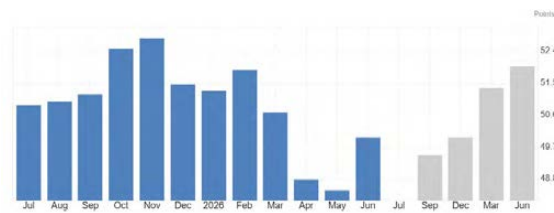
Economic activity in the United States continued to expand in June in real rather than nominal terms—a PMI reading above 50.0 indicates growth in real output volumes. Forecasts based on new orders suggest that the US economy will continue to grow in 2026, albeit at a somewhat slower pace. However, we expect both the labour market to recover and economic growth to accelerate, supported in part by the Fed's interest rate cuts.

US COMPOSITE PMI: ACTUAL AND FORECAST

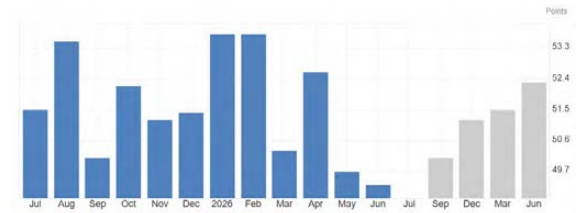


Europe remains vulnerable. The indirect effects of the war have caused economic activity in Europe to contract over the past two months, and we do not expect growth before the final quarter. We are observing a similar outlook in the United Kingdom.

AB COMPOSITE PMI: ACTUAL AND FORECAST

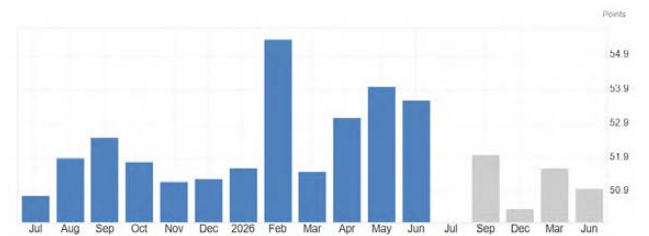


UK COMPOSITE PMI: ACTUAL AND FORECAST

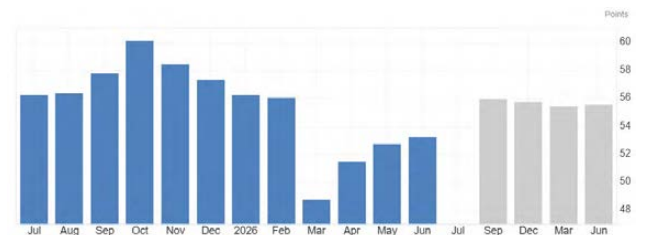


Despite all the obstacles, China has managed to sustain growth in economic activity. Within the next few years, we will see countries seeking to follow China's lead rather than that of the United States. It is no longer possible to halt China's expanding capacity for high-value manufacturing or its progress in AI-driven industrial production. That train has long since left the station; tariffs can delay this trajectory by only a few years. For China to exert greater influence in global politics, however, the yuan's share of international trade must increase, particularly given the US dollar's current share of approximately 65–70%. We expect continued progress in this area with each passing year. Growth in the Chinese economy has accelerated over the past five months, and we expect China to continue contributing to global growth in 2026. The winds of change continue to sweep across the Middle East. The region is accelerating investment in non-oil sectors and rapidly progressing towards becoming one of the world's leading commercial hubs. We expect economic activity across the Middle East—particularly in Qatar, Saudi Arabia and the United Arab Emirates—to accelerate in the coming months. An easing of the conflict will support this momentum.

CHINA COMPOSITE PMI: ACTUAL AND FORECAST



SAUDI ARABIA COMPOSITE PMI: ACTUAL AND FORECAST



It is no longer possible to halt the expansion of China's high-value manufacturing capacity or its progress in AI-driven industrial production.



We expect the S&P 500 Index to continue testing new highs.

Our outlook for the S&P 500 Index has been positive for some time. The S&P 500 tested and surpassed the 7,400 target. As noted in our broader assessments, the rally was not limited to a handful of popular large-cap companies; gains were broad-based, as confirmed by the Equal Weight S&P 500 Index.

We expect the S&P 500 to continue testing new highs, even though its constituent companies have become very expensive. The accompanying market capitalisation-to-net income chart indicates that valuations have become inflated.



The overall trend in the VIX Index and its futures indicates that risk appetite remains strong across the markets. We can identify a target range of 1.16–1.18 for the euro–dollar exchange rate.



VIX FUTURES

Symbol	Expiration	Last Price
VIX	-	15.84
VX28/N6	07/15/2026	-
VX/N6	07/22/2026	17.55
VX30/N6	07/29/2026	-
VX31/Q6	08/05/2026	-
VX32/Q6	08/12/2026	-
VX/Q6	08/19/2026	18.68
VX34/Q6	08/26/2026	-
VX/U6	09/16/2026	19.65
VX/V6	10/21/2026	20.35
VX/X6	11/18/2026	20.65
VX/Z6	12/16/2026	20.85
VX/JF7	01/20/2027	21.55
VX/Q7	02/17/2027	21.86
VX/H7	03/17/2027	22.03



Gold underwent a sharp correction within its broader uptrend and subsequently rebounded from the USD 3,850 support level. It is highly likely to target USD 4,500 in the coming months.

OUTLOOK FOR THE TURKISH ECONOMY AND DOMESTIC MARKETS

Despite global economic growth, the contraction in the Turkish economy continues. The data for June were also quite weak.

The Central Bank was forced to suspend its interest rate cuts due to the rise in oil prices caused by the war. As long as the Central Bank continues reducing rates while maintaining the following inequality, interest rates can be lowered without triggering volatility in the exchange rate:

Policy rate (37.0%) > CPI inflation (32.1%) + CDS risk premium (2.2%)

The slowdown in the rate of decline in inflation—the variable on the right-hand side of this inequality—has adversely affected the rate-cutting cycle. We expect year-end CPI inflation to be around 29%. Accordingly, we forecast that the Central Bank may deliver a cumulative four-percentage-point reduction over the remainder of the year.



Looking at the overall domestic trend, investors' search for returns continues.

Türkiye's credit default swap (CDS) spreads, which reflect foreign investors' perception of the country's risk, remain below the critical threshold of 300 basis points despite domestic political developments. This strengthens the Central Bank's control over the exchange rate. Those moving away from FX-protected deposits and foreign-currency deposits initially favoured Turkish lira deposits due to their high interest rates. The shift towards the housing sector, which began several months ago amid expectations of lower interest rates, continues. The housing market ended 2025 with record sales, and data for 2026 indicate that

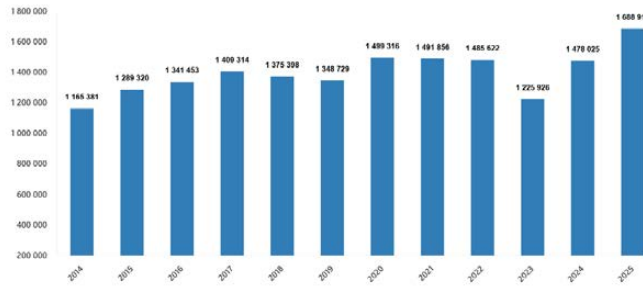
new records are being set. As the housing market stimulates activity in other sectors, analysis of the Purchasing Managers' Index (PMI) suggests that the Turkish economy will begin to recover in the second half of 2026. We also expect a recovery in new export orders in the coming months. Our year-end 2026 forecast for the US dollar/Turkish lira exchange rate is 51.30. We expect the Turkish lira's real appreciation trend to continue throughout 2026. The stock market, meanwhile, is likely to maintain its subdued, sideways trajectory for some time due to uncertainty surrounding the domestic MSCI index.

CBRT POLICY RATE

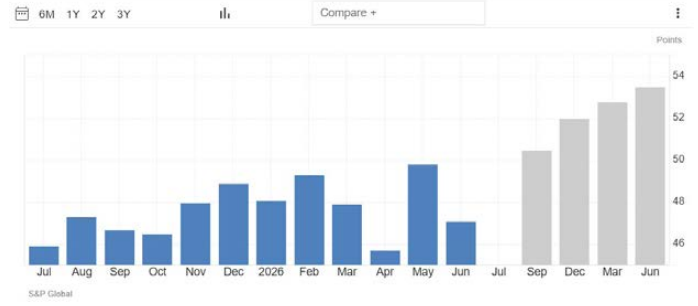
24.11.2023	-	40.00
22.12.2023	-	42.50
26.01.2024	-	45.00
22.03.2024	-	50.00
27.12.2024	-	47.50
24.01.2025	-	45.00
07.03.2025	-	42.50
18.04.2025	-	46.00
25.07.2025	-	43.00
12.09.2025	-	40.50
24.10.2025	-	39.50
12.12.2025	-	38.00
23.01.2026	-	37.00

HOME SALES (2014-2025)

Konut satışı, 2014 - 2025
(Adet)



TÜRKİYE MANUFACTURING PMI

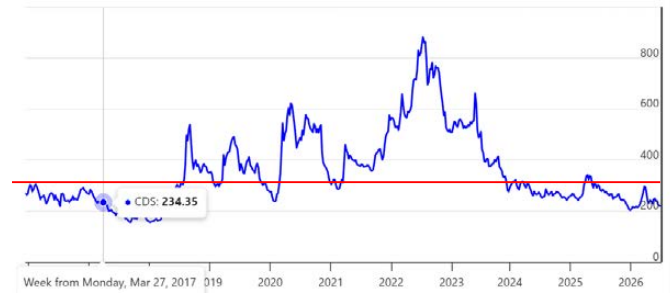


HOME SALES (2024-2025-COMPARATIVE ANALYSIS)

Konut satış sayısı, Mayıs 2026

	Mayıs			Ocak-Mayıs		
	2026	2025	Değişim (%)	2026	2025	Değişim (%)
Satış durumuna göre toplam satış	93 333	135 664	-31,2	569 537	609 632	-6,6
İlk el satış	30 196	41 860	-27,9	178 081	184 394	-3,4
İkinci el satış	63 137	93 804	-32,7	391 456	425 238	-7,9
Satış şekline göre toplam satış	93 333	135 664	-31,2	569 537	609 632	-6,6
İpotekli satış	19 754	20 325	-2,8	116 801	92 883	25,8
Diğer satış	73 579	115 339	-36,2	452 736	516 749	-12,4

TÜRKİYE CDS INDICATOR

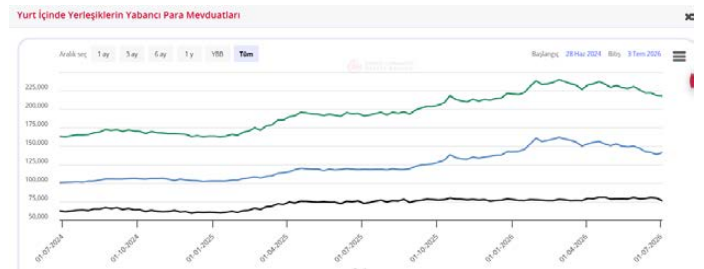


BIST 100 INDEX

BIST 100, Türkiye, G, İstanbul - A14253.05 Y14275.09 D1453.48 K14105.44



FOREIGN CURRENCY DEPOSITS OF DOMESTIC RESIDENTS



Kemal YAZICI
Chairman of the Board of the Automotive
Industry Exporters' Association (OİB)



The Turkish Automotive Supply Industry at the Heart of Global Transformation

Kemal Yazıcı, Chairman of the Board of the Automotive Industry Exporters' Association (OİB), discussed the Turkish automotive supply industry's growing prominence in exports, its green transformation, new target markets and the technological developments that will shape the sector over the next decade.



How do you assess the current position of the Turkish automotive supply industry in terms of exports?

Today, the Turkish automotive supply industry has become an important part not only of Türkiye's economy but also of the global automotive ecosystem. With its quality, engineering expertise, flexible production structure and competitive cost advantages, our industry is now one of the preferred supply hubs for the world's leading vehicle manufacturers. Turkish companies rank among the Tier 1 and Tier 2 suppliers of global manufacturers across numerous markets, particularly in Europe.

With exports totalling approximately USD 41.5 billion, Türkiye's automotive industry continues to lead the country's exports. In the first seven months of the year, exports increased by 2.6% to USD 24.4 billion. Our supply industry accounts for 38% of total automotive exports and consequently plays a major role in Türkiye's export performance. Moreover, the Turkish automotive supply industry has evolved far beyond a structure focused solely on parts manufacturing. Today, our companies also play an active role in design, product development and R&D processes. Investments in areas such as electrification, lightweight materials, electronic systems, connected vehicle technologies and next-generation mobility solutions are accelerating the industry's transformation.

The fact that European Union countries account for approximately 75% of our automotive exports is also a significant indicator of the level attained by the Turkish supply industry in terms of international quality standards and manufacturing capabilities. We believe that our supply industry will further increase its added value in the coming period through electric vehicles, software-based systems and sustainable manufacturing technologies.

What projects are you undertaking to increase exports?

As OİB, we undertake multidimensional initiatives to ensure the sustainable growth of exports. Through traditional trade missions, participation in international exhibitions, buyer delegations and industry promotion activities, we help our companies reach new customers and markets. Recently, we have placed particular emphasis on initiatives designed to help our exporters diversify their markets.

We also invest in projects that will shape the future of our industry. Through the OİB Venture Mobility Innovation Fund, we support the growth of start-ups operating in the field of mobility technologies. We aim to support projects developed in areas such as artificial intelligence, connected vehicle technologies, cybersecurity, automation, battery technologies and software solutions.

In addition, through the Future of Automotive Design Competition, which we organised for the 15th time this year, we help bring young entrepreneurs and innovative ideas into the industry. Our long-term objective is to increase not only the volume of our exports but also their technological sophistication and added value.

What contributions does the Turquality programme make to the industry?

In today's global competitive environment, producing high-quality products alone is not enough to achieve success. Strong brand management, institutional capacity, sustainable growth and visibility in international markets are equally important. This is precisely where the Turquality Programme provides significant advantages to our companies.



The fact that European Union countries account for approximately 75% of our automotive exports is a significant indicator of the level the Turkish automotive supply industry has achieved in terms of international quality standards and manufacturing capabilities.

Through the programme, companies have the opportunity to strengthen their capabilities in branding, institutionalisation, digital transformation and marketing. Many companies operating in the automotive industry have secured stronger positions in global markets with the support of Turquality. The programme makes a particularly valuable contribution to increasing high-value-added exports and enhancing the global recognition of Turkish brands. We believe that our industry must increase the number of internationally recognised brands in the coming period.

How do you assess the contribution of buyer delegations to exports?

Buyer delegations stand out as a highly effective means of helping our exporters reach new customers. At a time of intensifying global competition, it is crucial for companies to establish direct contact with decision-makers. These events provide Turkish companies with opportunities to hold one-to-one meetings with purchasing representatives from around the world.



As OİB, while maintaining our strong position in Europe, we are placing greater emphasis on alternative markets such as the United States, the Gulf countries, North Africa, Central Asia and Latin America. We see significant opportunities, particularly in countries where investment in vehicle manufacturing is accelerating and the automotive aftermarket is expanding.

One of the key advantages of these events is that they enable Türkiye to showcase its manufacturing capacity and technological capabilities first-hand. Face-to-face meetings help establish trust while laying the foundations for long-term business partnerships. Buyer delegations have made a significant contribution to many of our companies adding new customers to their export portfolios. As OİB, we plan to expand and continue these activities in the coming period.

Which new target markets do you plan to focus on in the coming period?

The European Union remains the largest export market for Türkiye's automotive industry and will continue to retain its importance in the coming period. However, changes in global trade and geopolitical developments have made market diversification more important than ever.

Therefore, while maintaining our strong position in Europe, OİB is placing greater emphasis on alternative markets such as the United States, the Gulf countries, North Africa, Central Asia and Latin America. We see significant opportunities, particularly in countries where investment in vehicle manufacturing is accelerating and the automotive aftermarket is expanding. Our objective is to facilitate exporters' access to new markets and help our industry achieve a more balanced export structure globally.

How will the European Green Deal and carbon regulations affect the Turkish automotive supply industry?

The European Green Deal is driving a fundamental transformation across the automotive industry. Reducing carbon emissions, adopting sustainable manufacturing practices and implementing circular economy principles are becoming key elements of competitiveness. For the Turkish automotive supply industry, which maintains strong trade relations with Europe, adapting to this transformation is a strategic imperative.

Although the transition may involve certain investment and compliance costs in the short term, we believe it will offer significant opportunities for our industry over the longer term. Investments in energy efficiency, the use of renewable energy, reducing carbon footprints and implementing sustainable manufacturing practices will strengthen the competitiveness of our companies. The green transition should be regarded not as a burden, but as a key to securing a stronger position in global markets.

In which areas does the Turkish automotive supply industry stand out in global competition?

One of the Turkish automotive supply industry's key advantages is its ability to combine a strong engineering infrastructure with manufacturing flexibility. Our companies successfully compete with their international counterparts in terms of quality standards, rapid delivery capabilities and cost management.

We manufacture to world-class standards across numerous fields, including casting, forging, metal forming, plastic injection moulding, rubber products, electronic systems, engines and powertrain components. In addition, increasing investment in R&D and design in recent years has strengthened our product development capabilities. Our proximity to Europe and advanced logistics infrastructure are also among the industry's major competitive advantages.

What do you consider the greatest opportunity for the Turkish automotive industry over the next decade?

As you are all closely aware, the automotive industry is currently undergoing a major transformation. Although there are many reasons for this change, I consider two issues particularly important and believe they will shape the next decade.

The first driver of this transformation is global warming. As the concentration of CO₂ in the atmosphere continues to increase, reducing emissions has become a priority in the automotive industry, as it has in every other sector. Many countries, led by the European Union, have begun lowering their CO₂ emission li-



One of the Turkish automotive supply industry's key advantages is its ability to combine strong engineering expertise with manufacturing flexibility. Our companies successfully compete with their international counterparts in terms of quality standards, rapid delivery capabilities and cost management.

mits. From 2035 onwards, only zero-emission vehicles will be permitted for sale in EU countries.

To address this challenge, technologies such as electric vehicles, hydrogen-powered vehicles and fuel cells are emerging as alternatives to internal combustion engines. This transition has introduced new areas such as lithium-ion battery cells, anode and cathode materials, battery management systems and cooling systems.

The second driver is the rise in people's expectations of vehicles as a result of increasing economic prosperity and technological advances, alongside an ageing population. This transformation has brought topics such as autonomous driving, artificial intelligence, connected mobility, driver assistance systems, in-vehicle entertainment and comfort to the forefront of our agenda.

I believe these transformations will represent the greatest opportunities of the coming period. If Türkiye can complement its strong, high-quality manufacturing infrastructure with advanced technology development capabilities, it will be well positioned to secure significant gains from this transformation.

Tomasz BIALACH
INTER CARS Commercial Director



The European Automotive Aftermarket at a New Turning Point in Its Transformation



INTER CARS Commercial Director Tomasz Białach shared his insights into the transformation of the European automotive aftermarket, evolving distributor expectations, the impact of artificial intelligence on the industry and the Turkish market.

How do you foresee the European automotive aftermarket market evolving over the next five years?

The European automotive aftermarket is expected to continue growing, driven primarily by an aging vehicle parc, increasing vehicle complexity, and inflationary pressure on maintenance costs. However, growth is likely to remain in the range of 3% to 5% annually.

At the same time, we will see stronger consolidation among distributors and suppliers, greater digitalization, and increasing demand for data-driven services. While electrification will gradually reshape product demand, the internal combustion engine vehicle fleet will remain dominant for many years, ensuring continued demand for traditional aftermarket products.

What do you consider to be the most significant transformation currently taking place in the industry?

The most significant transformation is the transition from a product-oriented business model, which is highly capital-intensive, to a data- and service-oriented ecosystem, which can help optimize inventory levels and improve operational efficiency.

Success is no longer determined solely by product availability but also by digital capabilities, customer experience, technical support, and access to vehicle data.

What kinds of changes are you observing in purchasing behavior?

Customers are becoming more informed and more price-sensitive. They increasingly compare prices online, as pricing has become more transparent and readily available. They expect immediate product availability and fast, transparent information regarding product quality, availability, and origin.

At the same time, professional workshops increasingly value reliability and service support alongside competitive pricing. The lowest price alone is no longer the key purchasing criterion.

How are distributors' product preferences changing?

Distributors are increasingly balancing premium brands with value-oriented alternatives, including private-label products. The focus is shifting toward broader portfolio coverage, supply reliability, and profitability.

In addition, demand for EV-related products, electronics, ADAS components, and diagnostic solutions is expected to grow steadily in the coming years.



Success is no longer determined solely by product availability; digital capabilities, customer experience, technical support and access to vehicle data are now equally decisive.



Türkiye is increasingly regarded as a strategic manufacturing hub. European distributors value Turkish suppliers for their flexible production capabilities, strong industrial infrastructure, competitive pricing and continuously improving quality standards.



Türkiye's geographical proximity to Europe also provides a significant advantage for companies seeking to reduce supply chain risks.

How has the supply chain been reshaped in the post-pandemic period?

The pandemic highlighted the importance of supply chain resilience. Since then, distributors have diversified sourcing, increased inventory levels across key product categories, and placed greater emphasis on supplier reliability rather than purely cost-based decisions.

In the years immediately following the pandemic lockdowns, we experienced a significant decline in service levels among many automotive suppliers. These service levels have not yet fully recovered, although the situation has improved substantially compared with the peak disruption period.

How do you assess the impact of Chinese manufacturers on the European aftermarket?

Chinese manufacturers are becoming increasingly important players in the European aftermarket. Their product quality has improved significantly, while their price competitiveness remains very strong. As a result, they are increasing competition across numerous product categories.

However, long-term success in Europe will depend on consistent quality, local support, spare-parts availability, warranty management, and brand trust.

Since the Chinese vehicle parc in Europe is still relatively young, it is too early to draw definitive conclusions regarding these areas. At present, spare-parts databases remain limited and parts availability is often insufficient compared with established vehicle manufacturers.

How will electrification affect distribution structures?

Electrification will gradually shift demand away from traditional maintenance parts toward electronics, software-related components, thermal management systems, and high-voltage vehicle parts.

Distributors will need to invest in technical expertise, employee training, and new logistics capabilities. However, the transition will be evolutionary rather than disruptive due to the long replacement cycle of Europe's vehicle fleet.

We already know that EVs will not enter the market as rapidly as many expected five years ago. They will certainly not become the only vehicle category. Instead, they will be one of several powertrain alternatives available to consumers. As a result, the complexity of aftermarket product portfolios will continue to increase.

How is the Turkish aftermarket market perceived from a European perspective?

Turkey is increasingly viewed as a strategic manufacturing hub. European distributors recognize Turkish suppliers for their flexibility, strong manufacturing base, competitive pricing, and continuously improving quality standards.

The country's geographical proximity to Europe also makes it an attractive sourcing location for companies seeking to reduce supply chain risks.

The Turkish aftermarket distribution sector appears to be highly competitive and relatively traditional in its business model. However, this creates opportunities for companies willing to invest and deliver additional value through technical support, access to vehicle data, workshop management systems, and digital solutions.

In your opinion, what is the most significant threat to the future of independent distribution channels?

The greatest threat is the growing competitive influence of vehicle manufacturers, particularly regarding access to vehicle data and diagnostics.

If independent market participants lose equal access to connected vehicle information, OEMs could gain a significant competitive advantage. Maintaining open, fair, and secure access to technical information and vehicle-generated data is therefore critical for preserving a healthy and competitive aftermarket ecosystem.

How will artificial intelligence and digitalization transform aftermarket distribution?

AI and digitalization will improve demand forecasting, inventory management, pricing strategies, customer support, and technical diagnostics.

Distribution companies will increasingly rely on predictive analytics and automation to improve efficiency, optimize stock levels, and enhance service quality. Organizations that successfully combine technological capabilities with strong customer relationships will achieve the greatest competitive advantage.

The process of implementing AI-driven solutions and digital transformation has already begun and is expected to accelerate significantly in the coming years.

OSS Association Assesses the Second Quarter of 2026!



The stagnation experienced in the automotive aftermarket throughout 2025 continued into the second quarter of 2026. Sales, exports and employment remained broadly flat during the quarter, while the industry expects a modest recovery in the third quarter of the year.



According to the Turkish Automotive Aftermarket Association (OSS) Sectoral Evaluation Survey for the second quarter of 2026, domestic sales declined by 1.25% in US dollar terms compared with the same period of 2025. While 28.6% of manufacturer members were planning investments over the next three months, “excessive cost increases” once again ranked as the leading challenge in the second quarter of 2026. The survey also identified “cash-flow problems” and “loss of business and revenue” among the major challenges facing members.

Turkish Automotive Aftermarket Association (OSS) assessed the performance of the automotive aftermarket in the second quarter of 2026 through a survey of its members.

According to OSS's Sectoral Evaluation Survey for the Second Quarter of 2026, the automotive aftermarket ended the period with a cautious outlook. Domestic sales declined by an average of 1.25% in US dollar terms compared with the same quarter of 2025. During this period, distributor members recorded a 2.78% decrease in sales in US dollar terms, while manufacturer members achieved a 0.71% increase.

Payment Collection Challenges Persist

According to the survey, members' inventories decreased by an average of 2.81% in the second quarter compared with the previous quarter. Inventories declined by 1.25% among distributor members and by 4.82% among manufacturer members.

The survey also covered expectations for the third quarter of 2026. The industry anticipates a 1.33% increase in domestic sales in US dollar terms compared with the same period of the previous year.

The negative trend in payment collections continued. The combined proportion of members describing collections as worse or significantly worse than in the previous quarter reached 43.8%, while only 7.8% reported an improvement. Although approximately half of the members indicated no change, the clear predominance of negative assessments over positive ones suggests that collection performance continues to weaken.

23 Out of Every 100 Companies Reduced Their Workforce

Among the members participating in the survey, 18.8% increased their workforce compared with the first quarter of 2026, while 57.8% maintained their existing employment levels. The proportion reporting a decline in employment reached 23.4%.

Among distributor members, the proportion reducing their workforce stood at 30.6%, considerably higher than the 14.3% recorded among manufacturer members. Employment remained largely stable among manufacturers, while distributors exhibited a more pronounced downward trend.

Excessive Cost Increases Remain the Biggest Problem

The section addressing industry challenges was one of the survey's most noteworthy areas. “Excessive cost increases” ranked first among the problems reported by members in the second quarter of 2026, cited by 78.1% of respondents. “Cash flow problems” followed in second place at 73.4%.

“Loss of business and turnover” ranked third, cited by 46.9% of members. Meanwhile, 35.9% of respondents pointed to “rising shipping costs and delivery delays,” and 32.8% cited “customs-related problems.” “Supply problems” and “regulatory changes” were each cited by 17.2% of respondents.

Expectations for the Next Three Months Improved

The survey also examined the industry's investment plans. According to the findings, 20.3% of members are considering making new investments over the next three months, a proportion similar to that recorded in the previous survey. While 23.7% of manufacturer members reported investment plans in the previous survey, this figure increased to 28.6% in the latest survey. Among distributor members, however, the proportion declined from 17.6% to 13.9%.

Compared with the previous survey, the proportion of distributor members expecting industry conditions to deteriorate over the next three months fell from 55.9% to 36.1%. Among manufacturer members, the corresponding proportion decreased from 52.6% to 35.7%.



Capacity Utilisation Increased in the Second Quarter

The average capacity utilisation rate among manufacturers reached 73.93% in the second quarter of 2026, up from 68.16% in the first quarter. Manufacturer members' production increased by 1.79% compared with the same quarter of 2025, while their exports rose by 2.68% in US dollar terms over the same period.



Commenting on the survey results, Ali Özçete, Chairman of the Board of OSS Association, said:

"The results for the second quarter of 2026 clearly demonstrate that the automotive aftermarket is striving to maintain its operations under challenging economic conditions. The contraction in sales and decline in employment among our distributor members, together with the fact that most companies identify rising costs and cash flow difficulties as their primary concerns, indicate that the pressure on our industry persists. While businesses are attempting to manage increasing financing costs and operating expenses, they must also make far more cautious decisions regarding inventory, pricing and investment to remain competitive.

Nevertheless, the survey results reveal not only the risks facing our industry but also its resilience. Growth in production and exports,

higher capacity utilisation and the increase in investment plans among our manufacturer members demonstrate that companies retain confidence in their long-term growth potential. Improved sales expectations for the coming period also suggest that the industry may be entering a gradual and controlled recovery.

The automotive aftermarket is a strategic sector that makes a significant contribution to Türkiye's economy through production, exports and employment. Sustaining this potential requires greater economic predictability, easier access to financing, measures to alleviate cost pressures and the determined continuation of policies supporting production and exports."



The survey results reveal not only the risks facing our industry but also its resilience.

A Vision for a Strong and Enduring Türkiye in Digital Trade

E-exports offer the automotive aftermarket opportunities for sustainable growth, new customer acquisition and strong brand development in global markets.



By closely monitoring developments in global e-commerce, we regularly update our target-country strategy. We have added nine countries to the existing list of 26, bringing the total number of target countries for e-exports to 35. We provide companies with more advantageous conditions by offering an additional 20% support rate for activities targeting these markets.

Driven by technological advances, global trade is undergoing a fundamental transformation across every area, from sales channels and logistics processes to marketing methods and customer relations. In this new era, e-exports enable companies to transcend geographical boundaries, reach buyers directly in different markets, monitor market dynamics closely and build brand value on a global scale.

This transformation also presents significant opportunities for growth and market access for Türkiye's automotive aftermarket, which possesses extensive export experience and the capability to offer products across diverse markets. Digital marketplaces and online sales channels complement traditional export methods, enabling our companies that manufacture or sell spare parts, accessories, equipment and maintenance products to reach a broader customer base.

We regard e-exports not merely as a new channel for increasing sales volumes, but as a strategic growth area that strengthens our companies' competitiveness and brand-building capabilities.

In line with this approach, as the Ministry of Trade, we formulate our e-export policies around a comprehensive framework designed to facilitate companies' entry into digital commerce and enhance their global competitiveness. We combine financial support with digital consultancy services and training programmes.

A Support Model Spanning Market Entry to Order Delivery

Through Presidential Decision № 5986 on E-Export Support, we aim to reduce the costs incurred by our companies during their e-export operations and contribute to their sustainable growth in international markets.

Within this framework, we support the cost of sector-, country- and e-export-focused reports required by companies when preparing action

Hasan ÖNAL
Head of the Department of E-Export, Digital Marketing, Behavioural Public Policy and Next-Generation Technologies



plans for overseas markets; digital advertising and promotional activities aimed at increasing the visibility of Turkish products; and order fulfilment services—including warehousing and returns—that enable rapid delivery. Our support also covers the cost of opening online stores in target markets, services obtained from local e-commerce partners offering end-to-end solutions and commissions paid to online marketplaces.

Through our E-Export Consortium model, we aim to provide end-to-end solutions in areas such as marketing, logistics, payments and customer service to companies and entrepreneurs that may find it difficult to establish comprehensive e-export operations using their own resources. By granting beneficiary status to retail e-commerce websites and online marketplaces, we also support stakeholders that play an important role in the e-export ecosystem.

We regularly update our target-country approach by closely monitoring developments in global e-commerce. By adding nine countries to the existing list of 26, we have increased the number of target countries for e-exports to 35. Through the additional 20% support rate applied to activities targeting these countries, we provide our companies with more advantageous conditions. Detailed information on our e-export support programmes is also available through the Easy Support Platform developed by our Ministry.

Access to Accurate and Reliable Information

Market conditions, consumer preferences, advertising models and customs regulations can change rapidly within the e-commerce ecosystem. Consequently, timely access to current, reliable and actionable information has become just as decisive for companies' success as access to financial resources.

To address this need, the Ministry launched the Easy Export Platform (KİP) in 2020. Through KİP, we provide companies with country, sector, market, competitor and complementary product information in a single digital environment, supporting data-driven decision-making when selecting target markets.

Thanks to the platform's AI-powered technological infrastructure, companies can compare the countries in which similar products are prominent, demand conditions in the relevant markets, price ranges and the competitive environment. This makes it easier for them to focus on markets offering greater potential for their products.

Building on the experience gained through KİP and combining it with the specific requirements of e-exports, we developed the Easy E-Export Platform (E-KİP). We designed E-KİP as a digital consultancy centre serving a range of user profiles, from entrepreneurs taking their first steps into e-exporting to experienced exporters seeking to expand their existing operations.

Comprising 12 modules, the platform offers guidance across numerous areas, particularly target market selection, marketplace assessment, operational readiness, digital marketing, logistics and payment systems.

The Marketplace Module brings together indicators relating to demographics, consumer habits and digital behaviour across 24 countries, helping companies assess markets more accurately. The Step-by-Step E-Export Module breaks down the e-export journey into distinct stages and provides companies with a practical roadmap outlining which actions to take at each stage. It also enhances their capabilities in areas such as product listing, digital marketing, logistics and after-sales processes.

Developed in accordance with the Ministry's legislation, guidelines and guidance documents, the AI-powered Expert Intelligence chatbot answers e-export-related questions around the clock, enabling users to access the information they need quickly and directly. KİP and E-KİP are available free of charge through the e-Government Gateway.

The New Direction of Trade in the Age of Artificial Intelligence

We anticipate that, in the coming period, e-commerce will no longer remain a system in which users simply search for products and place orders through online platforms. This emerging model, in which AI-powered digital assistants research products, compare alternatives and participate in purchasing processes on behalf of users, is known as "agentic commerce."



This transformation is expected to introduce new operating models across many areas of e-exporting, from preparing product information and conducting digital marketing to pricing and customer service. In this process, it will become increasingly important for our companies to adapt to AI-powered search, comparison and purchasing systems.

As the Ministry, while enhancing the technological capabilities of our existing platforms, we are also continuing our efforts to help companies use artificial intelligence applications more effectively. Our key priority for the coming period is to establish an e-export ecosystem in which companies operate on the basis of reliable data, adapt rapidly to evolving technologies and possess the capacity to generate high added value.

Events and Global Engagements Strengthening E-Exports

We complement our financial support and digital consultancy services with events that enable companies to establish direct contact with different stakeholders across the e-commerce ecosystem.

We organise the Ankara E-Export Summit to raise companies' awareness of e-exports and provide information about the support offered by our Ministry. The inaugural Summit was held on 8-10 November 2023, followed by the second edition on 6-8 November 2025. Through panels, sessions and workshops featuring contributions from public- and private-sector representatives, we enabled companies to follow the latest developments and establish new business connections.

At the international level, we organised the Istanbul Global E-Export Summit (IGEXX) in line with our vision of positioning Türkiye as a regional and global hub for e-exports. Held in September 2024, IGEXX brought together global and regional marketplaces, technology and logistics companies, payment service providers, public-sector representati-

ves and e-exporting companies in Istanbul. Representatives from 33 global and regional marketplaces attended the Summit, alongside more than 3,000 participants.

The presentations, panel discussions and B2B meetings held as part of the programme provided a platform for companies to connect directly with global stakeholders and explore new opportunities for collaboration.

We regard IGEXX not merely as an event addressing the latest developments in digital commerce, but as a strategic initiative that facilitates companies' access to new markets, fosters international partnerships and strengthens Türkiye's position in cross-border digital trade.

In line with this objective, we will hold the second edition of the Summit in Istanbul on 3-5 September 2026 under the theme "Beyond Borders." Through IGEXX 2026, we aim to enable companies to establish new connections with global marketplaces and international buyers, gain first-hand insight into evolving business models and innovative technologies, and follow the developments shaping the future of e-exports.



Our goal is not merely to enable more companies to begin e-exporting, but to help Turkish companies become trusted international brands that grow in global markets and use innovative technologies effectively.

OSS Association Visits the Republic of Türkiye Ministry of Trade

On 25 February 2026, OSS Association held a series of meetings with officials from the Republic of Türkiye Ministry of Trade to discuss the industry's priorities and international developments.

As part of the meetings, the delegation visited Director General of Exports Mehmet Ali Kılıçkaya; Director General for Product Safety and Inspection Hakkı Karabörklü and Deputy Director General Umut Can Gök; Director General of Imports Mehmet Azgın; Head of the Department of E-Export, Digital Marketing, Behavioural Public Policy and Next-Generation Technologies Hasan Önal; and Deputy Director General for International Agreements and the EU Canan Nilüfer Dora at their respective offices. The discussions addressed current developments in the automotive aftermarket and potential areas of cooperation.



The meetings addressed current developments in the automotive aftermarket and potential areas of cooperation.

During the visits, information was shared about OSS Association's activities and international initiatives, while assessments were presented regarding the industry's current position, export potential and the "Made in Europe" initiative. The participants also exchanged views on incentives and practices covering the automotive aftermarket, e-export processes and practices falling outside the scope of existing support mechanisms.

The OSS delegation comprised Board Member and Secretary General Emirhan Silahtaroglu, Board Member Beylem Leblebici Birsen, Board Member Müjdat Aras, General Coordinator Orçun İstanbulluoglu and Legal Regulations Working Group Member Bumin Kaan Köktürk.



The Industry's Hub for Collective Insight and Synergy: Member Relations and Organisation Working Group



At a time when the automotive and industrial sectors are undergoing profound global change and transformation, strengthening industry-wide collaboration beyond individual achievements has become essential. As one of the most dynamic and operational structures supporting this vision, the Member Relations and Organisation Working Group serves both as the public face of our Association and as one of the strongest bonds uniting the industry. Together with our Board and Working Group members, and supported by the strength of the industry's leading companies, we work side by side through an inclusive and visionary approach.

A Growing Family and Strategic Objectives

The purpose of our Working Group is to continuously strengthen our Association's influence within the industry and enhance its representative capacity. In line with this objective, our primary goal is to attract new members by communicating accurate information about our Association, the high-quality activities we undertake and the significant benefits of membership through the appropriate channels. We manage the application processes of prospective member companies professionally and ensure that all necessary information and documentation are collected meticulously.

However, our mission extends beyond welcoming new members into our organisation. We organise high-profile national and international events that strengthen our visibility in the global market. Through these events, we bring stakeholders together and maximise commercial and social synergy.



"In a world where global competition is evolving rapidly, moving beyond individual achievements to build collective intelligence is no longer a choice—it is the only way to shape the future."

A New Era of Interactive Engagement: Guest Member Meetings

This year, we introduced an important initiative to transform internal communication within our Association from a one-way structure into a fully participatory ecosystem. We now open our monthly Working Group meetings to representatives of all OSS member companies. By welcoming an average of five to eight members as guests at each meeting, we foster broader and more inclusive collaboration.

During these meetings, we provide updates on the Association's current projects and activities while giving the floor primarily to our guests. In this interactive environment, members can freely share their industry insights, ask questions directly and assess the sector from their own perspectives. Our principal objective is not only to highlight the valuable benefits members can gain from the Association, but also to explore how their knowledge and experience can create additional value for both our organisation and the wider industry. These interactive meetings have become the most tangible reflection of our pursuit of collective insight.

Four Key Areas of Focus and Activity

To manage this comprehensive structure efficiently, we have divided our activities into four principal areas:

Member Relations: The process of welcoming new members into our community, which lies at the heart of our Association's growth strategy.

Participating Member Relations: A bridge that strengthens existing members' connections within the Association, sense of belonging and active involvement in committees.

Member Data Collection: An information-gathering mechanism that supports our industry knowledge base and future projections.

Event Organisation: Prestigious gatherings that energise the entire ecosystem and integrate our members into global business networks.

Shaping the Future Through the Power of Data

In today's business world, accurate and actionable information is undoubtedly the most valuable asset. Guided by this principle, we collect data from our member companies at regular intervals to make a strategic contribution both to our Association and to the industry as a whole. One such initiative is the industry assessment survey we conduct with our members every quarter.

This data enables us to monitor the pulse of the industry in real time, identify areas for improvement and develop roadmaps for the future. The information collected not only serves as a beacon for our members in their decision-making processes but also reinforces our industry's institutional standing among the public and policymakers by providing academically grounded evidence.

We extend our sincere gratitude to our members, whose contributions enable us to obtain concrete data on the direction of our industry.

Stronger Together

At a time of such intense and demanding global competition, no company can build a complete ecosystem on its own. Joining forces, sharing expertise and speaking with a collective voice are the keys to carrying us confidently into the future.

As the Member Relations and Organisation Working Group, we invite all industry stakeholders to become part of this extensive network. Together, we aspire to build our synergy, strengthen our collective capabilities and shape our shared future.

The Future of the Lubricants Industry Is Being Reshaped by Electrification

Nilay TATLISÖZ

General Manager of Castrol Türkiye,
Ukraine and Central Asia



In our interview with Nilay Tatlısöz, General Manager of Castrol Türkiye, Ukraine and Central Asia, we discussed the future of Türkiye's lubricants market, the impact of electric and hybrid vehicles on the industry, sustainability investments, the transformation of distribution structures, and Castrol's strategy of positioning Türkiye as a regional production and export hub.



How do you see the future of Türkiye's lubricants market?

Türkiye's lubricants industry continues to grow, supported by the country's strong automotive ecosystem, advances in industrial production and the transformation taking place in mobility. Record-breaking automotive sales over the past three years and the steady expansion of the vehicle parc have directly contributed to the growth of the lubricants sector. In 2026, we expect a more balanced yet sustainable growth trajectory.

The continued expansion of the vehicle parc and annual vehicle sales remaining at high levels are among the key factors supporting demand for lubricants. In addition, fleet renewal across the heavy-duty and commercial vehicle segments, together with growth in the industrial and manufacturing sectors, will continue to contribute to the industry's development.

Electrification will be one of the most important trends shaping the industry in the coming years. As electric vehicles become more widespread, demand is shifting away from conventional engine oils towards high-technology fluids for battery thermal management, cooling systems and powertrains. Nevertheless, we anticipate that internal combustion engine and hybrid vehicles will continue to account for a significant share of Türkiye's vehicle parc for many years. We therefore view the industry's future not as a transition driven by a single technology, but as a multilayered transformation in which different powertrain technologies evolve side by side.

What impact will electric vehicles have on the industry? How is their growing adoption affecting the lubricants market, and how is Castrol preparing for this transformation?

The rapid adoption of electric vehicles is driving a major transformation across the automotive industry. Compared with internal

combustion engine vehicles, EVs have different cooling and efficiency requirements. At Castrol, we aim not merely to participate in this transformation, but to help shape it.

Castrol's strategy is built around supporting this transition in mobility, delivering next-generation fluids for both electric and hybrid vehicles, and developing sustainability-focused solutions. We see this transformation as a significant opportunity.

At the heart of our strategy are the development of next-generation products compatible with electrified powertrains, stronger collaboration with OEMs, and the delivery of sustainable solutions. We regard electrification as an opportunity for growth.

As electric vehicle technologies advance, lubrication requirements are also evolving. Instead of conventional engine oils, specialised fluids that enhance EV efficiency are becoming increasingly important. Through the Castrol ON range of e-Fluids, we provide battery thermal management, transmission fluid and cooling solutions designed to maximise electric vehicle performance.

The e-Fluids offered under the Castrol ON brand are designed to improve the performance, durability and efficiency of electric vehicles. Castrol ON products help reduce charging times, extend battery life and increase driving range.

Today, Castrol ON e-Fluids are used as the factory fill in two out of every three electric vehicles produced globally. This demonstrates Castrol's engineering expertise in electrification and its leading position in OEM partnerships.

Is the distribution landscape undergoing a transformation?

As in almost every industry, distribution structures are also undergoing a transformation. Success is no longer measured solely by the strength of a logistics network. Next-generation vehicle technologies, electrification, evolving OEM specifications and digitalisation have made the technical capabilities of distributors and service centres more important than ever.

Distribution is no longer simply a sales model focused on bringing products to market; it is evolving into a more strategic structure in which technical expertise, data utilisation, digital capabilities and customer experience are managed together. Next-generation vehicle technologies, electrification and changing OEM specifications make it increasingly critical for distributors and service centres to match the right product with the right application.

At Castrol, we regard our distributors as key business partners at the heart of this transformation. Through our strong nationwide distribution infrastructure and a network reaching more than 30,000 service points across Türkiye, we serve a broad ecosystem encompassing OEMs, authorised and independent service centres, fleet customers and e-commerce channels.

However, the value we provide extends well beyond product supply. Through technical training, product and application expertise, field support and engineering capabilities, we help our business partners strengthen their competencies and adapt more rapidly to evolving vehicle technologies and customer expectations. In doing so, we not only ensure that our products are used correctly but also enable service centres to deliver more reliable, efficient and higher-value services to their customers.



We view sustainability not only as an environmental responsibility but also as a key area of innovation shaping the future of the industry.

How is the growing adoption of hybrid vehicles shaping the lubricants market?

Hybrid vehicles serve as an important bridge in the transition to fully electric mobility and are significantly transforming the lubricants market. This transformation is reflected not only in the number of vehicles on the road but also in the changing technologies required of lubricants.

Hybrid engines have different operating characteristics from conventional internal combustion engines due to frequent start-stop cycles, intermittent engine operation and exposure to varying thermal cycles. As a result, engine oils must provide faster protection, offer greater resistance to contaminants and maintain their performance under diverse operating conditions. The growing adoption of hybrid vehicles is therefore increasing demand for more advanced, high-performance lubricant solutions.

At Castrol, we have been closely monitoring this transformation for many years and developing technologies that help shape it. HYSPEC (Hybrid Specification), which we developed by analysing the unique operating characteristics of hybrid engines and real-world driving conditions, is one of the strongest examples of our engineering approach to hybrid technologies.

HYSPEC is not a product but a new performance standard based on the real-world operating conditions of hybrid engines. Engine oils meeting the HYSPEC standard deliver up to 25% better performance than current industry standards in three areas critical to hybrid vehicles: engine cleanliness, rapid adaptation to intermittent engine operation and thermal efficiency. As electrification advances, we expect hybrid vehicles to remain an important part of the mobility ecosystem for many years. The future of the lubricants industry should therefore be evaluated not only in terms of conventional engine oils or electric vehicle fluids, but also alongside innovative solutions developed specifically for hybrid technologies. At Castrol, we will continue to develop technologies that address users' evolving needs throughout every stage of this transformation.

How are sustainability targets affecting the lubricants industry?

Sustainability is no longer merely an environmental objective for the lubricants industry; it has become a strategic transformation area reshaping the way business is conducted. Today, the industry is focused on developing longer-lasting products, improving resource efficiency, reducing carbon footprints and ex-

panding circular economy practices. Sustainability therefore affects the entire value chain, from product development and manufacturing to packaging and waste management.

At Castrol, we support this transformation through both our products and our operations. Castrol ON e-Fluids, developed for electric vehicles, help improve vehicle efficiency while contributing to longer driving ranges, faster charging and extended battery life. On the manufacturing side, packaging improvements at our Gemlik facility have reduced plastic use by approximately 20%, delivering significant gains in resource efficiency.

One of the most prominent examples of our sustainability vision is the Castrol More Circular business model, which we launched in Türkiye. Under this programme, used oil collected from businesses is re-refined into base oil using advanced technology and re-introduced into production processes. This gives a resource previously regarded as waste a new economic life, generating both environmental and financial benefits. We operate this model in partnership with TAYRAŞ, drawing on its expertise in this field, while supporting participating business partners with Castrol products in proportion to the amount of used oil they recover.

We view sustainability not only as an environmental responsibility but also as an important area of innovation shaping the industry's future. Through our products, operations and business models, we will continue to promote the circular economy and lead the industry's transformation. At Castrol, our goal is not merely to address today's needs but to begin developing the technologies, business models and partnerships that will shape the mobility ecosystem of tomorrow. We believe sustainability is not simply an approach to reducing environmental impact; it is also a strategic transformation area that supports the industry's competitiveness and long-term growth.

Can Türkiye become a regional production or export hub for Castrol?

Kesinlikle. Aslında Türkiye, Castrol açısından Absolutely. Türkiye is not only an important market for Castrol but also one of the countries at the heart of our production, export and regional growth strategy. One of the clearest indicators of this is Türkiye's position—alongside the United States, China and India—as one of Castrol's four strategic priority markets globally. This is one of the most tangible demonstrations of our confidence in Türkiye and our long-term investment approach. In line with this strategy, we have made sig-

nificant investments in our Gemlik manufacturing facility in recent years. With an investment of approximately USD 20 million over the past three years, we increased its production capacity from 95 million litres to 135 million litres. Our goal is to raise this capacity to 160 million litres by 2030. As one of Castrol's eight manufacturing facilities in Europe, the Gemlik plant serves as a strategic production and export hub for Türkiye and the wider META region. These investments are intended not only to meet the needs of the Turkish market but also to support our regional growth.

Today, the Gemlik manufacturing facility is the largest production centre in the TUCA region and continues to play a key role as an export hub. We export approximately 20% of the products manufactured at the facility, creating value from Türkiye across a broad geographical area. Türkiye's strong industrial infrastructure, skilled workforce, strategic geographical location and advanced logistics network make the country an important regional production and export centre. At Castrol, we believe in Türkiye's potential and will continue to create value for both the country and the wider region by expanding our investments and manufacturing capabilities.

How do you see the future of independent workshops?

Independent workshops will continue to be one of the key pillars of Türkiye's automotive aftermarket. The expanding vehicle parc indicates that independent workshops will retain strong growth potential in the years ahead.

However, this growth is also bringing significant transformation. The increasing adoption of electric and hybrid vehicles, next-generation engine technologies and digitalisation require workshops to continuously enhance their technical knowledge and equipment. The workshops that will stand out in the future will be those that do more than provide maintenance and repair services: they will possess expertise in evolving vehicle technologies, advise customers on selecting the right products and distinguish themselves through high-quality service.

At Castrol, we regard independent workshops not merely as a sales channel but as some of our most important business partners. In addition to supplying products, we help our workshops adapt to evolving technologies through technical training, field support and specialist expertise. We know that successfully navigating the industry's transformation requires more than offering the right product; it also depends on bringing the right knowledge and correct application practices into the field.

In its 25th year, Automechanika Istanbul became the global meeting point for the automotive aftermarket industry.

Held under the motto “25 Years of Leadership in the Automotive Aftermarket,” Automechanika Istanbul 2026 brought together approximately 1,400 exhibiting companies from 41 countries and 51,127 visitors from 130 countries in Istanbul during its 25th anniversary edition. Highlighting key trends shaping the industry’s transformation—from electric vehicle technologies to digital service solutions—Automechanika Istanbul continues to serve as one of the most important platforms strengthening the international visibility of Türkiye’s automotive aftermarket industry for a quarter of a century.



As throughout its quarter-century history, Automechanika Istanbul 2026 went beyond being a trade fair where products and services were showcased, bringing together the key topics shaping the industry’s future agenda. Organised in cooperation with Messe Frankfurt Istanbul and Hannover Fairs Turkey, the four-day event at the TÜYAP Fair and Congress Center in Istanbul placed a wide range of subjects at the forefront for industry professionals—from electric vehicle technologies and digital service solutions to sustainable mobility applications and next-generation manufacturing technologies. The meetings held and new business connections established throughout the fair demonstrated that the transformation of the automotive aftermarket industry is continuing to gain momentum.

Electric Vehicles and Digitalisation Took Centre Stage

Electric vehicle technologies, next-generation maintenance and repair solutions, sustainable mobility applications, additive manufacturing technologies and digitalisation-focused service models attracted considerable attention at the fair. At the Innovation4Mobility area, sponsored by Bakırcı, visitors explored numerous innovative applications covering service operations, vehicle inspection systems, body repair technologies and electric vehicle service solutions. During the Automechanika Academy sessions, industry representatives gained insights into supply chain transformation, sustainability and the future of the automotive aftermarket.

New Partnerships and Export-Focused Meetings Came to the Fore

Automechanika Istanbul’s strong international visitor profile provided exhibitors with valuable opportunities to strengthen existing business relationships and access new markets. Discussions held throughout the fair focused particularly on business development opportunities in Europe, the Middle East, Africa and Central Asia. New distribution agreements, export connections and strategic partnerships were among the key factors enhancing the fair’s commercial impact.

Spare parts and service equipment for electric and hybrid vehicles, software-supported solutions and next-generation maintenance technologies were also among the product categories that attracted the greatest interest from visitors.

A Quarter-Century Success Story

Held for the 25th time this year, Automechanika Istanbul once again demonstrated the international significance of Türkiye’s automotive aftermarket ecosystem through its high level of international participation and extensive business network. While the business meetings and new connections established during the fair supported the industry’s growth ambitions in global markets, they also indicated that the transformation driven by electric vehicles, digitalisation and sustainability will continue to shape the sector’s agenda in the years ahead.

Having accompanied the industry’s development for a quarter of a century, the fair will continue to connect Türkiye’s automotive aftermarket expertise, manufacturing capabilities and export potential with the world through the international scale it has achieved today.

Automechanika Istanbul will return to the TÜYAP Fair and Congress Center in Istanbul from 24 to 27 March 2027..



Held for the 25th time this year, Automechanika Istanbul once again demonstrated the international significance of Türkiye’s automotive aftermarket ecosystem through its high level of international participation and extensive business network.

Automechanika Istanbul Celebrated Its 25th Anniversary with Leading Industry Figures

Leading representatives of the automotive aftermarket gathered at a special event held at Divan Kuruçeşme on 17 February 2026 to celebrate the 25th anniversary of Automechanika Istanbul. The event attracted strong interest from industry stakeholders and was also attended by the Chairman and members of the Board of Directors of the Turkish Automotive Aftermarket Association (OSS).

Moderated by journalist Hande Berktaş, the panel entitled "A Quarter-Century Journey: The Story of Transformation with Automechanika Istanbul" explored the industry's transformation from a range of perspectives. The speakers included Selim Aydınlioğlu, General Manager of ZF Aftermarket Türkiye & Azerbaijan; Aytuğ Sakallıoğlu, Chairman of the Board of Lucas Elektrik; and rally driver Volkan Işık. The participants comprehensively assessed the structural changes, technological transformation and future vision of the automotive aftermarket.

The event also featured a briefing on Automechanika Frankfurt 2026, which will be held from 8 to 12 September 2026. Michael Johannes, Vice President of Mobility & Logistics at Messe Frankfurt and Automechanika Brand Manager, shared the brand's global vision and strategic objectives with the participants.

The 25th anniversary of Automechanika Istanbul, which has helped shape the automotive aftermarket for a quarter of a century, once again brought the industry's transformation and future objectives into focus. The event also highlighted the importance of collaboration among stakeholders and a forward-looking vision.



The Automotive Aftermarket Industry Came Together at Automechanika Istanbul 2026

Turkish Automotive Aftermarket Association(OSS) came together with industry stakeholders at Automechanika Istanbul 2026, where it was one of the main supporting organisations.



The opening gala was held at Mandarin Oriental Bosphorus on Monday, 18 June, with strong attendance. On the first day of Automechanika Istanbul 2026, the 11th International OSS Conference, organised by the OSS Association, took place as part of the Automechanika Academy. Held under the theme "Shaping the Future of Mobility," the conference addressed the industry's transformation, developments within the mobility ecosystem and the future of the automotive aftermarket.

The keynote speaker was André Scholle, Vice President of ZF Aftermarket and Head of the IMEA Region. In his presentation, Scholle shared insights into the changing dynamics of the automotive aftermarket, sustainability, digitalisation and the mobility solutions of the future.

The well-attended conference concluded with a plaque presentation ceremony. Following the conference, OSS members and industry representatives gathered at the 19 May Reception held in the OSS Lounge, where they had the opportunity to network and exchange views.

OSS Association Addressed the Mobility and Business Development Agenda at Automechanika Academy

As part of the Automechanika Academy, Turkish Automotive Aftermarket Association (OSS) once again organised panels offering insights into the future of the industry. Industry representatives came together at sessions focusing on mobility, sustainability, technology and business development.

On Wednesday, 20 May, the industry's transformation was discussed during the panel entitled "The Future of the Aftermarket: Sustainable Transformation in the Age of Mobility and Technology," organised by the OSS Mobility, Technology and Sustainability Working Group. Moderated by Ufuk Çilek, General Manager of Valeo Service Türkiye and the Middle East, the panel featured Duygu Güngör Ünalır, General Manager of Türkiye Aftermarket at Mahle Motor Parçaları San. ve Tic. A.Ş., and Saim Aşçı, Deputy Chairman and CEO of MOTOR AŞIN A.Ş. The panellists shared their views on changes within the mobility ecosystem, sustainability-driven transformation and the future of the aftermarket industry.

On Thursday, 21 May, the OSS Business Development Working Group organised a panel entitled "Business Development Trends in the Aftermarket." Moderated by Şenay Bayram, Marketing Manager for Southeast Europe at Schaeffler Vehicle Lifetime Solutions, the panel featured Berkay Nebioğlu, Digital Marketing and Communications Manager at Euromaster Lastik ve Servis Ltd. Şti., and Can Berki, Project and Mobility Director at Messe Frankfurt. The discussion focused on business development trends, digitalisation and future opportunities within the automotive aftermarket.





The Future of the Aftermarket Will Belong to Those Who Can Manage Technological Diversity

Duygu Güngör Ünalır, General Manager of Türkiye Aftermarket at MAHLE Motor Parçaları, discussed the strong potential of Türkiye's automotive aftermarket, MAHLE's 2030+ strategy and the transformation extending from electrification to digital service solutions.

MAHLE

What role does Türkiye play in MAHLE's global aftermarket strategy?

Türkiye is one of MAHLE's strategically important markets. This is primarily due to its young and dynamic vehicle parc, strong independent aftermarket structure, and position as a major logistics hub between Europe, the Middle East and Central Asia.

Türkiye also has a market structure in which different powertrain technologies coexist. While internal combustion engine vehicles still account for a large share of the market, the proportion of hybrid and electric vehicles is steadily increasing. This aligns closely with MAHLE's technology-neutral approach.

In line with this approach, MAHLE is pursuing its MAHLE 2030+ strategy. Under this strategy, electrification and thermal management are among the key pillars of future mobility. At the same time, components for clean and efficient internal combustion engines will continue to play an important role. MAHLE is also investing in other sustainable fuel solutions, including hydrogen, synthetic fuels and bio-fuels, because achieving climate targets will require the utilisation of all available technological solutions.

This broad technology portfolio is particularly important for Türkiye, where different power-

train technologies coexist and market requirements continue to evolve. We therefore regard Türkiye not merely as a sales market but also as an important growth platform where new technologies and service concepts can be introduced and successfully implemented.

How do you assess the Turkish automotive aftermarket?

Türkiye's automotive aftermarket is one of the most dynamic and resilient markets in Europe.

High vehicle ownership costs and the increasing average age of the vehicle parc are supporting demand for maintenance and repair services. Türkiye also has a highly developed independent workshop network with a continuously improving level of technical expertise. In addition, electrification is expanding rapidly alongside the changing vehicle parc, creating further business potential for the Turkish automotive aftermarket.

Looking ahead, we see significant growth potential, particularly in thermal management, advanced diagnostic solutions, emissions systems and electrification-related services.

Türkiye's automotive aftermarket therefore offers considerable opportunities in terms of both market volume and technological transformation.

What changes have you observed in the expectations of distributors and workshops in recent years?

In the past, distributors' expectations focused primarily on product availability, supply reliability and competitive pricing. For workshops, access to technical knowledge and the right equipment was equally important.

Duygu GÜNGÖR ÜNALIR
General Manager of MAHLE Engine
Components Türkiye Aftermarket



Today, distributors and workshops expect not only products but also technical support, training, diagnostic solutions and business development assistance.

Access to technical expertise has become particularly critical due to electric vehicles, high-voltage systems and advanced electronic architectures.

At MAHLE Lifecycle and Mobility, we position ourselves far beyond the role of a conventional spare parts supplier. Alongside our comprehensive product portfolio, ranging from engine components and filtration solutions to thermal management systems, we provide market-oriented services, technical support, training programmes and digital solutions. Our objective is to support workshops at every stage of their daily operations and to serve as both a technology and knowledge partner.

How is electrification affecting MAHLE's aftermarket operations?

MAHLE recognised this transformation at a very early stage and positioned itself accordingly, with a vision to help shape the future of mobility. This approach is reflected in both our R&D activities and the products and solutions we bring to market. Our investments in thermal management technologies and the expansion of our workshop equipment portfolio to meet electrification-related service requirements clearly demonstrate this commitment.

For us, electrification does not mean replacing existing business models; it means complementing and expanding them.



Türkiye's automotive aftermarket offers significant opportunities in terms of both market volume and technological transformation.



High vehicle ownership costs and the increasing average age of the vehicle parc are driving demand for maintenance and repair services. Türkiye also has a highly developed independent workshop network with a continuously improving level of technical expertise. In addition, electrification is advancing rapidly alongside the changing vehicle parc, creating further business opportunities for Türkiye's automotive aftermarket.

Since 2025, our aftermarket portfolio has also included critical power electronics components sourced directly from MAHLE's original equipment operations, such as onboard chargers (OBCs) and input filters. Additional power electronics and high-voltage components are planned to further expand the portfolio. Today, we offer more than 1,000 products specifically designed for battery-electric vehicles.

Electric and hybrid vehicles are creating entirely new service opportunities, particularly in battery diagnostics, high-voltage safety, advanced diagnostic solutions and thermal management. We actively support this transformation through solutions such as BatteryPRO, TechPRO® 2, E-HEALTH Charge and E-Scan, as well as comprehensive training programmes tailored to different competency levels.

Throughout this transformation of the aftermarket, our objective is to help our business partners turn electrification into a new source of revenue and a long-term growth opportunity.

Why are thermal management systems becoming increasingly critical?

We now know that thermal management is no longer merely a matter of comfort. It has become a critical system with a direct impact on efficiency, emissions, safety and driving range. Moreover, this applies not only to electric vehicles but to all powertrain systems.

Regardless of how advanced vehicle technologies become, inadequate heat management can reduce system performance, shorten component life and create safety risks.

Demand for thermal management services in the aftermarket is therefore growing rapidly. At MAHLE, we provide a strong portfolio of both products and service solutions in this field.

For example:

- Our portfolio naturally includes thermal management module solutions that reflect our original equipment expertise, and we remain one of the world's most preferred brands in this field.
- Our ArcticPRO® air-conditioning service units support both R134a and R1234yf refrigerants, enabling workshops to service a wide range of vehicles.
- Our E-CARE Fluid solution enables cooling circuit maintenance and servicing to be carried out easily and effectively across all powertrain systems.
- We also offer complete system solutions comprising heat exchangers, pumps, sensors and valves.

How will artificial intelligence and digitalisation transform the automotive aftermarket?

Artificial intelligence and digitalisation will be among the most important areas of transformation in the automotive aftermarket.

Analysing vehicle-generated data will enable predictive maintenance practices to become increasingly widespread. Faults will be identified before they occur, allowing service planning to be carried out more efficiently.

AI-supported diagnostic systems such as MAHLE TechPRO® 2 will also help technicians make faster and more accurate decisions.

As a result, workshop processes will become more efficient, faster and increasingly customer-focused.

What will be the biggest change in the automotive aftermarket over the next five years?

In my view, the biggest change will be managing technological diversity.

Internal combustion engine, hybrid and electric vehicles will continue to coexist for many years. Aftermarket companies will therefore need to service multiple technologies simultaneously.

Highlighting the broader transformation driven by digitalisation and connected vehicle technologies, Felix Matthias Walter, Director

of Service Solutions at MAHLE Lifecycle and Mobility, stated in a previous interview: "The workshop of the future will evolve from a business focused solely on repairs into a digitalised and customer-centric service centre. Digitalisation and connectivity are fundamentally changing workshop processes."

Against this backdrop, success in the aftermarket will depend not only on mastering different powertrain technologies but also on adapting to new digital service requirements. Successful companies will not be those that focus on a single technology, but those that develop expertise, equipment and service capabilities across all powertrain systems while embracing digital and customer-centric business models.

What do you consider the greatest advantage of Türkiye's independent aftermarket?

The entrepreneurial spirit and high adaptability of Türkiye's independent aftermarket are among its greatest advantages.

Independent workshops can adapt rapidly to new technologies and changing customer expectations. The strong distributor network, extensive service infrastructure and high level of technical expertise are also among the industry's key strengths.

This flexible structure places Türkiye's automotive aftermarket in a more advantageous position than many other markets during periods of transformation.

Why do you consider the automotive aftermarket an attractive career field for young professionals?

The automotive aftermarket is currently one of the fastest-changing areas of the automotive industry.

Developments such as electrification, artificial intelligence, digitalisation, sustainability, data analytics and new mobility solutions are directly influencing the aftermarket.

Young professionals working in this industry have opportunities to develop themselves not only in technical disciplines but also across sales, marketing, digital technologies, business development and customer management.

In short, the automotive aftermarket is no longer simply about spare parts; it is an ecosystem at the intersection of technology, service and innovation. This makes it an exceptionally exciting and promising career field for young talent.

Mehmet KARAKOÇ
OSS Board Member



Mobility and Training

Training the Workshops of the Future Today

The world of mobility is undergoing a major transformation. However, this transformation is not limited to changes in vehicles. The real change is taking place among the people who design, manufacture and maintain those vehicles and provide services to customers.

Today, the automotive industry is discussing electric vehicles, connected vehicles, advanced driver assistance systems (ADAS), AI-powered diagnostic solutions and next-generation software. Yet when we consider how all these technologies are implemented in the field, one common theme emerges: training.

No matter how advanced technology becomes, sustainable transformation is impossible without a workforce capable of implementing it correctly.

Vehicles Are Changing—and Workshops Must Change Too

For many years, automotive aftermarket services centred on mechanical maintenance and repairs. Today, however, vehicles are no longer composed solely of mechanical systems.

Alongside electric and hybrid powertrains, they now incorporate radars, cameras, sensors, software updates and connected systems.

Servicing a vehicle is no longer simply about replacing parts. Technicians must be able to diagnose faults accurately, calibrate systems, understand software and carry out repairs in accordance with manufacturer standards.

The workshops of the future must therefore become not only repair centres but also technology centres.

People Are at the Heart of the Transformation

We often discuss technology in our industry. In my view, however, the most important issue in the coming years will not be technology but human resources.

Today, many workshops can invest in equipment and gain access to new technologies. Yet finding qualified technicians capable of using these technologies is becoming increasingly difficult.

The declining interest of young people in technical professions is one of the most important issues our industry must address. The automotive aftermarket is no longer an industry composed solely of mechanics working with spanners and toolboxes.

Today's technicians must be versatile professionals with expertise in electrical systems, electronics, software, data analysis and vehicle technologies.

Training Is No Longer Optional

Training has therefore become far more than a corporate social responsibility initiative for our industry.

We must establish a system that begins in vocational high schools, continues through manufacturer-led training and embraces lifelong learning. Technology no longer changes every few years; it changes every few months. Knowledge acquired today may become outdated within only a few years. Training must therefore evolve from a periodic activity into a continuous development journey.

A Major Opportunity for Türkiye

I believe Türkiye has a significant advantage amid this transformation. Thanks to our strong service culture, young population, technical education infrastructure and experience in the automotive industry, we have the potential to become a regional hub for automotive aftermarket services.

However, to realise this potential, we must continue investing in human resources. In the future, competitive advantage will depend not only on possessing the right technology but also on training people who can use it effectively.



Conclusion

The transformation of mobility continues without slowing down.

Vehicles are changing, technologies are advancing and customer expectations are evolving. Yet one fact remains unchanged: we must prepare the workshops of the future before the vehicles of the future arrive.

The future of mobility will not be shaped solely by new technologies, larger batteries or more advanced software. The real difference will be made by people who understand, apply and continuously improve these technologies.

Training is therefore not an option for our industry; it is a strategic necessity. An approach that begins in vocational high schools, continues through manufacturer-led training and is built on lifelong learning will determine the future of our industry.

In the mobility landscape of tomorrow, competitive advantage will depend not only on possessing technology but also on developing people who recognise the limits of their knowledge and continue to learn.

The OSS Mobile App Is Now Available

The has launched the OSS Mobile App, developed to make communication with its members faster, more effective and more accessible.



Available on both Android (Google Play) and iOS (App Store), the app enables members to access information about the association's activities, events and announcements, as well as the latest industry updates, through a single platform.

Launched in line with the association's digitalisation objectives, the OSS Mobile App aims to strengthen members' engagement with the association and facilitate more effective information sharing.

The OSS Mobile App can be downloaded free of charge on mobile devices running Android or iOS.

OSS DERNEĞİ mobil uygulamamız kullanıma hazır

Üyelerimize daha hızlı, etkin ve kolay bir iletişim deneyimi sunmak amacıyla geliştirdiğimiz mobil uygulamamız kullanıma açılmıştır.

Mobil uygulamamıza aşağıdaki platformlardan erişim sağlayabilirsiniz.



Google Play Store ve App Store'da.



Lale ERAY
Director at PwC Türkiye / Former Head of Department
at the Ministry of Industry and Technology



The New Competitive Landscape in Automotive Investment: Evolving Incentive Policies and Türkiye's Position



Today, the automotive industry is one of the strategic sectors most heavily supported by government incentives and subsidies worldwide. This is due not only to the industry's substantial capital requirements but also to the high added value it generates, its contribution to technology transfer, its export capacity and its extensive impact across the supply chain.



Türkiye has historically maintained a robust incentive framework for attracting automotive investment. VAT and customs duty exemptions, tax reductions, social security premium support and land allocations offered under the investment incentive scheme have long served as key support mechanisms for investments entering the country.

The economic multiplier effect of an automotive investment extends far beyond the boundaries of the manufacturing facility itself. When the supplier industry, logistics, engineering, software and service ecosystem built around vehicle manufacturers is taken into account, such investments become one of the most powerful levers in national industrial policy. Countries therefore offer a broad range of incentives to attract new automotive investments, from tax exemptions and cash grants to land allocations and R&D support.

A Transforming Industry and Changing Investor Expectations

The fundamental transformation of the global automotive industry in recent years has made it necessary to redefine traditional incentive paradigms. The transition to electric vehicles (EVs), the growing geopolitical and strategic importance of battery technologies, carbon-neutral manufacturing targets and the regionalisation of global supply chains through nearshoring have radically changed investor priorities.

When making investment decisions, global manufacturers no longer consider only tax incentives and financial support. A country's technological development capabilities, access to the battery ecosystem, pool of skilled labour, green energy infrastructure and level of digital manufacturing maturity now play a role that is at least as decisive as cost advantages.

Investment Incentives in Türkiye and the HIT-30 Programme

Türkiye has historically maintained a strong incentive framework for attracting automotive investment. VAT and customs duty exemptions, tax reductions, social security premium support and land allocations offered under the investment incentive scheme have long served as key support mechanisms for investments entering the country.

However, the Türkiye Century Development Initiative, introduced in 2025 to strengthen global competitiveness, and the HIT-30 Programme under the project-based incentive system are among the clearest indicators of the transformation taking place in Türkiye's incentive framework. The substantial and consistent support provided to the automotive industry under the Initiative Programmes, together with targeted calls for electric vehicle, battery cell and advanced engineering investments—particularly under HIT-30—aim to elevate the ecosystem by providing more advantageous tax incentives and cash support.

The Digital and Green Transformation Programmes supporting this mechanism also stand out as critical instruments for financing the automotive industry's twin transition.



The “Made in EU” approach can be defined not merely as a protectionist measure, but as an initiative aimed at establishing a comprehensive value-added partnership.



Global Competition: “Made in EU” and Regional Dynamics

One of the clearest manifestations of the policy shift in the automotive industry can be seen in the new industrial policies of the European Union (EU), Türkiye’s largest market. Post-pandemic supply chain disruptions, China’s rise in electric vehicles and batteries, and the substantial subsidies provided by the United States under the Inflation Reduction Act (IRA) have prompted the EU to adopt a more active protectionist stance. The Automotive Action Plan announced by the European Commission and the “Made in EU” approach form the foundation of this strategy.

The “Made in EU” approach can be defined not merely as a protectionist measure but as an initiative aimed at establishing a comprehensive value-added partnership. The EU seeks to ensure that high-value-added technologies—from battery cells and power electronics to semiconductors and vehicle software—are developed and manufactured within Europe. In this new ecosystem, Türkiye’s competitive landscape is also being reshaped:

- **The Eastern European bloc:** Poland, Hungary, Slovakia, the Czech Republic and Romania are attracting major automotive investments by leveraging the advantages of direct access to EU funding, the absence of customs and regulatory barriers, and full integration into the European value chain.
- **The North African axis:** With investments from Renault and Stellantis, Morocco has become one of Europe’s most important nearshore supply hubs. Egypt is gaining prominence through new electric vehicle strategies that encourage local content, while Tunisia is increasing its share of automotive electronics and component manufacturing.

Türkiye must therefore compete not only with established manufacturers in continental Europe but also with a new generation of rapidly emerging automotive hubs along the southern and eastern axes.

Conclusion

With approximately USD 37 billion in exports, a well-established automotive manufacturing industry, a flexible supplier base and advanced engineering capabilities, Türkiye has a strong manufacturing heritage in the global automotive industry.

However, carrying this strength in conventional automotive technologies into the future will require the country’s manufacturing infrastructure to evolve in step with new vehicle technologies. In this dynamic environment, investment incentives must be designed not merely as financial and tax support mechanisms but as part of a comprehensive ecosystem architecture.

Incentive policies should attract global vehicle manufacturers (OEMs) to Türkiye while simultaneously accelerating the integration of the domestic supplier industry into the electric vehicle value chain. Accordingly, incentive mechanisms must prioritise projects that drive the technological and software-oriented transformation of vehicle manufacturers and suppliers, establish a digital and green manufacturing infrastructure, and place high-value-added R&D activities at their core.

Through these policies, Türkiye will further advance its position in the global automotive value chain and strengthen its role as a critical technology and manufacturing hub for the future.

The Future of the Automotive Aftermarket Begins at Automechanika Frankfurt



In terms of content, Automechanika Frankfurt 2026 will focus on the key trends shaping the future. Alongside the new “HighTech4Mobility” forum, which will address software-defined vehicles, autonomous driving and digital services, the event will also place particular emphasis on innovation, transformation, sustainability, training, professional development and recruitment.

The automotive industry is undergoing a period of fundamental change. Artificial intelligence, electromobility, digitalisation, new mobility concepts and software-defined vehicles are transforming not only vehicle technologies but also business models within the automotive aftermarket. It is therefore becoming increasingly important for companies in manufacturing, workshop services and retail to assess technological developments at an early stage and identify new market opportunities.

Against this backdrop, Automechanika Frankfurt, taking place from 8 to 12 September 2026, will host approximately 4,500 exhibitors from more than 80 countries showcasing innovations for the entire automotive aftermarket. As an international industry gathering, the fair will bring together decision-makers, experts, key industry players and mobility pioneers from around the world, providing a unique platform for professional knowledge exchange, new business contacts and collaboration.

In terms of content, Automechanika Frankfurt 2026 will focus on the key trends shaping the future. Alongside the new “HighTech4Mobility” forum, which will address software-defined vehicles, autonomous driving and digital services, the event will also place particular emphasis on innovation, transformation, sustainability, training, professional development and recruitment.

The Future Mobility Park will demonstrate what tomorrow’s mobility could look like in practice, offering visitors the opportunity to experience and test new solutions. This programme will be complemented by the new Experience Park, which will host a range of exciting activities, including monster trucks, a Unimog obstacle course and a rollover simulator.

Another major new attraction will be the first Automechanika Pitlane. Approximately 200 metres long and located beneath the arches of Hall 4, the pit area will become a new meeting point for motorsport enthusiasts. Visitors can look forward to live action featuring leading motorsport personalities and racing vehicles, powerful engine sounds, thrilling challenges and exclusive behind-the-scenes insights.

The programme focusing on classic cars is also being expanded. The newly established “Classic Alliance” will create a platform connecting experts from different fields while highlighting the economic potential that the classic car segment offers workshops and retailers. The programme will include live restoration work on a unique vehicle, expert discussions on the stage in the Classic Car Area and numerous opportunities for direct exchange.

In addition, the Automechanika Academy will offer a rich and diverse programme. Across five stages, experts will discuss the latest industry trends and developments. Automotive professionals will also be able to enhance their vocational skills directly at Automechanika through free, hands-on workshops organised by renowned companies. The workshop programme will cover a broad range of topics, including damage assessment and cost estimation, measurement and specialised repair techniques, surface preparation and painting, ADAS diagnostics and alternative powertrains.

Young talent will be another key focus. Through the AMBITION programme, the fair will provide school pupils, apprentices and university students with engaging insights into career paths and future technologies within the industry. The programme will feature interactive formats such as workshops, live talks, games and entertainment.

For more information:
www.automechanika-frankfurt.com



The OSS Association Met with Its Members in Konya

The OSS Association met with its members at the Selçuklu Congress Center in Konya on Thursday, 26 February. The event, attended by members operating in Konya and the surrounding provinces, focused on the industry's current agenda and the association's activities.

As part of the programme, members of the Board of Directors visited association members. Following these visits, the February Board Meeting was held at the Selçuklu Congress Center. During the meeting, the association's ongoing activities and the latest developments in the automotive aftermarket were discussed.

The event began with an opening address by Ali Özçete, Chairman of the OSS Board of Directors, followed by a panel moderated by

Secretary General Emirhan Silahtaroglu. The panel featured Working Group Board Representatives Cermal Çobanoğlu, Ufuk Çilek, Halit Başbuğ, Vecibe Kaplan Arslan and Müjdat Aras. Discussions focused on the current state of the industry and the activities of the working groups. The interactive session concluded with contributions and assessments from the participants.

The programme concluded with an iftar dinner that brought members together.



Koray ÖZCAN 
General Manager of TÜVTÜRK

Vehicle Inspection Is One of the Most Critical Elements of Road Safety

We interviewed TÜVTÜRK General Manager Koray Özcan about the vehicle inspection system and its transformation.



How are defect assessment criteria determined? What criteria are used to classify minor and major defects?

The legal framework for vehicle inspections is established by Highway Traffic Law № 2918, the relevant regulations, EU legislation and the TS EN ISO/IEC 17020 standard.

At TÜVTÜRK, we conduct vehicle inspections in accordance with the legislation and defect classification table established by the Ministry of Transport and Infrastructure. Our inspections are performed to the same standards for all vehicles, within the framework of the mandatory inspection criteria set out in the regulations.

Defects are also classified according to criteria established by the Ministry. Assessments take into account their impact on road safety, the accuracy of the vehicle's identification information, their environmental impact and the risks they pose to other road users. Accordingly, defects are classified as minor, major or dangerous.

How is the ageing of Türkiye's vehicle parc affecting inspection results? What does the average vehicle age mean for road safety?

As the average age of the vehicle parc increases, wear caused by use and shortcomings in maintenance become more evident. This may result in a higher number of defects and deficiencies being identified during inspections.

Naturally, we observe that defect rates increase as vehicles grow older. However, most vehicles return for reinspection after the identified deficiencies have been rectified and can then safely re-enter traffic. Periodic vehicle inspections therefore make a significant contribution to road safety. I would particularly emphasise that the primary risk is not the age of the vehicle itself, but vehicles that never undergo their mandatory periodic inspections.

Will new criteria be introduced for electric vehicle inspections? How will electric and connected vehicles transform inspection systems?

Vehicle inspection processes are continuously evolving in parallel with the transformation of automotive technologies. As electric vehicles become more widespread, new inspection methods and assessment procedures are being developed in accordance with their technical specifications and the relevant legislation. Because periodic vehicle inspections focus primarily on road safety, there are no major differences in the fundamental inspection requirements for electric vehicles, apart from areas such as electrical systems and high-voltage circuits.

In the future, electronic systems and data-driven assessments will become increasingly important alongside mechanical inspections. As already practised in some countries, we will see inspections conducted via onboard diagnostics (OBD). Work is continuing to develop the technological infrastructure and inspection methods required for next-generation vehicles.

To what extent do you encounter counterfeit or low-quality spare parts during inspections?

Vehicle inspections assess whether parts meet the applicable safety and technical requirements. Although counterfeit or low-quality parts may not be identified directly, they are recorded as defects if they fail to meet performance and safety requirements or do not comply with type-approval standards.

Are any changes to the periodic vehicle inspection system planned for the near future?

The relevant legislation and regulations are continuously updated in line with technological developments in the automotive industry. Vehicle inspection processes are also revised in parallel with these developments and continue to evolve in response to emerging requirements. In particular, centralised database-based and OBD-connected inspection processes will become much more prominent in future discussions.

How would you assess Türkiye's position compared with vehicle inspection practices in Europe?

Türkiye's vehicle inspection system is aligned with European legislation and practices. The system is continuously updated in parallel with advances in automotive technologies and emerging requirements.

Work is ongoing to integrate next-generation applications, such as advanced driver assistance systems and connected vehicle technologies, into inspection processes. These efforts aim to strengthen Türkiye's alignment with Europe even further.



During vehicle inspections, parts are assessed to determine whether they meet the applicable safety and technical requirements. Although counterfeit or low-quality parts may not be identified directly, they are recorded as defects if they compromise performance or safety, or fail to comply with type-approval requirements.

Philippe BAUDIN
Chairman of EQUIP AUTO Paris



EQUIP AUTO Paris's Vision for the Future



Following the successful 50th-anniversary edition of EQUIP AUTO Paris, Chairman Philippe Baudin discussed the exhibition's future objectives, the industry's transformation and the business opportunities it offers Turkish automotive companies in an exclusive interview with our magazine.



Our primary objective is to further strengthen our position as a leading international trade fair. We aim to host 1,500 exhibiting companies and brands across more than 100,000 square metres of exhibition space. Through our international sales network, which operates in more than 20 countries, we intend to further increase global participation.

Did EQUIP AUTO Paris 2025 meet your objectives and expectations in this special edition celebrating its 50th anniversary? To what extent?

EQUIP AUTO Paris 2025 represented an extremely important and meaningful milestone for our organisation. Celebrating the exhibition's 50th anniversary was not merely symbolic; it also provided an important opportunity to demonstrate once again that EQUIP AUTO stands at the heart of the automotive industry's transformation.

The results fully met our expectations. We welcomed 91,500 industry professionals and 1,400 exhibiting companies and brands. EQUIP AUTO thereby further strengthened its position as France's leading international event for the automotive, aftermarket and workshop sectors.

We also achieved significant success in terms of international participation. International companies from 35 countries accounted for 55% of exhibitors, while international professionals from 118 countries represented 18% of visitors.

However, it would not be appropriate to assess this successful event solely through figures. One of the most remarkable aspects of this year's exhibition was the quality of the business meetings and professional interactions that took place throughout the event. Our exhibitors expressed considerable satisfaction with both the quality of the visitor profile—which included decision-makers, purchasing executives and professionals responsible for investment projects—and the business opportunities generated during the exhibition.

The 50th-anniversary edition also demonstrated how EQUIP AUTO has accompanied the automotive industry through its major transformations. The newly created Themed Villages, Tech Academy, Arena, European Forum on the Future of Automotive Distribution and After-Sales Services, Hackathon and "(R)EVOLUTION" exhibition addressed the key issues shaping the industry's future while providing professionals with practical, directly applicable content.

The return of many major brands after a long absence also sent a very strong message. It demonstrated the industry's renewed confidence in EQUIP AUTO and confirmed that the event is not merely an exhibition space but also a meeting point for business development, innovation and international collaboration.

Our international partners also made a major contribution to this success. I would particularly like to thank OSS and our representative in Türkiye, Promosalons Türkiye, for our successful collaboration. Both organisations have been increasing awareness of EQUIP AUTO among Turkish automotive professionals for many years and making a significant contribution to strengthening commercial relations between the two ecosystems.

What are your main objectives and priorities for EQUIP AUTO Paris 2027?

The principal objective of EQUIP AUTO Paris 2027 is to bring together all stakeholders from the automotive and mobility sectors around the major transformations reshaping our industry, while providing companies with a stronger business development platform than ever before.

Our first priority is to further strengthen our position as a leading international exhibition. We aim to host 1,500 exhibiting companies and brands across more than 100,000 square metres of exhibition space. Through our international sales network, which operates in more than 20 countries, we intend to further increase global participation.

Our second priority is to guide the industry through its fundamental transformation. Electric vehicles, new energy technologies, workshop digitalisation, connected solutions, vehicle software, the circular economy and new approaches to mobility are permanently transforming the automotive industry.

Accordingly, we have redesigned the exhibition around 19 areas of activity covering the entire automotive value chain and created new themed villages offering substantial added value.

These will include:

- The Light Commercial and Heavy-Duty Vehicle Repair & Maintenance Village
- The Two- and Three-Wheeled Motor Vehicles and Licence-Free Vehicles Village
- The Energy and Fleet Management Village

Through these areas, we aim to address the emerging needs of rapidly expanding market segments and industry professionals.

We also have a strong sustainability vision. Our objective is to make EQUIP AUTO a benchmark automotive event in terms of environmental and social responsibility. We therefore support our exhibitors in their sustainable transformation and integrate this approach throughout the organisation of the exhibition.

Continuing our international growth is another key priority. Türkiye has become one of Europe's most important automotive manufacturing centres. We believe Turkish manufacturers and suppliers will find EQUIP AUTO Paris 2027 an ideal environment in which to develop international business partnerships.

How is the transformation of the automotive aftermarket affecting the organisation, positioning and content of EQUIP AUTO Paris?

The automotive industry is experiencing one of the greatest transformations in its history. Electrification, connected vehicle technologies, embedded software, artificial intelligence, workshop digitalisation, new environmental regulations, the circular economy and changing user habits are reshaping the industry's entire value chain. Our responsibility is to lead this transformation and guide industry professionals through it.

EQUIP AUTO therefore continuously updates its content. Our objective is not only to showcase the latest technologies but also to help industry professionals analyse and understand the changes taking place.

In line with this approach, we organise:

- New themed villages
- High-level conferences
- Live technical demonstrations
- Dedicated events covering new energy technologies
- Retrofit solutions
- Fleet management
- Digital solutions
- Remanufacturing

Our mission is not merely to showcase innovation. Our primary objective is to help industry professionals prepare for the future and develop their businesses sustainably.



Our collaboration with OSS is of great importance. Over the years, we have built a strong partnership founded on mutual trust. Through OSS and our representative in Türkiye, Promosalons Türkiye, we remain in close contact with Turkish automotive professionals, enabling us to better understand their expectations and strengthen their presence at the exhibition. I would like to take this opportunity to express my sincere gratitude to OSS for its valuable contributions. This collaboration is one of the finest examples of the strong ties within the European automotive aftermarket.

What are the main advantages that make EQUIP AUTO Paris particularly attractive to Turkish companies?

Türkiye is now one of the leading players in the European automotive industry.

Thanks to their high manufacturing quality, innovation capabilities and competitiveness, Turkish manufacturers, equipment producers and suppliers occupy a strategic position within international supply chains.

Within just a few days, EQUIP AUTO Paris offers Turkish companies the opportunity to meet professionals from Europe, Africa, the Middle East and other regions of the world, including:

- Distributors
- Workshop networks
- Importers
- Repair professionals
- Purchasing executives
- Decision-makers

The exhibition is therefore not only an important platform for accelerating commercial growth but also a unique opportunity to follow industry trends, discover new technologies and establish long-term business partnerships.

Our collaboration with OSS plays a crucial role in this process. Over many years, we have developed a strong partnership founded on mutual trust. Through OSS and our representative in Türkiye, Promosalons Türkiye, we maintain continuous communication with Turkish automotive professionals, gain a better understanding of their expectations and strengthen their presence at the exhibition.

I would like to take this opportunity to express my sincere gratitude to OSS for its valuable contributions. This collaboration is one of the finest examples of the strong ties within the European automotive aftermarket.

How has the visitor profile of EQUIP AUTO Paris changed in recent years?

Our priority is not simply to attract more visitors but to bring the right visitors to the exhibition. In recent years, we have observed a clear improvement in the quality of our visitor profile. Today, a significantly higher proportion of our visitors consists of company executives, purchasing managers, technical managers and senior decision-makers capable of making investment decisions within a short timeframe.

The number of international visitors also continues to increase. Today, our exhibition welcomes professionals from more than 100 countries.

We are also seeing a continuous improvement in the quality of visitors from strategic markets such as Türkiye. Through our close collaboration with OSS, we are successfully attracting high-potential executives, purchasing professionals and decision-makers to the exhibition.

This development is extremely important to our exhibitors because companies primarily want to establish high-quality business connections, acquire new business partners and access genuine commercial opportunities.

How are the passenger car, commercial vehicle and heavy-duty vehicle segments currently represented at EQUIP AUTO Paris?

Passenger cars have historically formed the foundation of EQUIP AUTO Paris and will continue to account for a substantial share of the exhibition in 2027.

At the same time, we are observing very strong growth in the light commercial vehicle (LCV) and heavy goods vehicle (HGV) markets.

Fleet transformation, new powertrain systems, electrification, workshop digitalisation and predictive maintenance technologies are creating new requirements in these segments.



The initial results of the sales process for the 2027 exhibition are also highly encouraging. Despite there being more than 17 months until the event opens, approximately 240 companies have already confirmed their participation. This means that 50% of the targeted total stand space has already been secured. More importantly, 92% of the registered companies are loyal exhibitors that have participated regularly in previous editions.

To address these developments, we have created the Light Commercial and Heavy-Duty Vehicle Repair & Maintenance Village (VUL/PL Repair & Maintenance Village), dedicated entirely to these markets.

This specialised area will bring together:

- Spare parts manufacturers
- Automotive equipment manufacturers
- Distributors
- Tyre industry representatives
- Workshop networks
- Digital solution developers
- Light commercial and heavy-duty vehicle maintenance specialists

Our objective goes beyond creating an exhibition area. We also aim to establish a genuine practical application and experience centre.

To achieve this, we are collaborating with GARAC, one of France's leading educational institutions specialising in automotive and mobility professions.

At the interactive workshop created in partnership with GARAC, visitors will be able to observe technical demonstrations in a real working environment covering areas such as:

- Advanced diagnostic systems
- Next-generation engine technologies
- Electric vehicles
- Manufacturer technologies
- Augmented reality applications

Our goal is not only to showcase technologies but also to highlight the professions, areas of expertise and training processes that the industry will require in the future.

How do you assess the return of major brands that rejoined the most recent edition after many years?

This is an extremely positive development and sends a powerful message. The fact that many major brands have chosen EQUIP AUTO once again demonstrates that the industry has repositioned the exhibition as an indispensable platform for business development.

The participation of these brands represents an important gain not only for their own success but also for the entire exhibition ecosystem.

The presence of major brands:

- Enhances the exhibition's appeal
- Attracts more high-quality visitors
- Creates new partnerships and commercial opportunities for all exhibitors

We aim to build further on this positive momentum at the 2027 edition.

Do you believe EQUIP AUTO Paris 2027 will be stronger and more successful? What are the reasons for your confidence?

Yes, I firmly believe so. There are several tangible indicators supporting our confidence.

First, the 2025 edition clearly demonstrated that EQUIP AUTO has the right strategic positioning. The feedback we received from exhibitors and visitors was extremely positive. In particular, the quality of the business meetings and the commercial opportunities generated created a high level of satisfaction.

The initial results of the sales process for the 2027 exhibition are also highly encouraging. Despite there being more than 17 months until the event opens, approximately 240 companies have already confirmed their participation. This means that 50% of the targeted total stand space has already been secured.

More importantly, 92% of the registered companies are loyal exhibitors that have participated regularly in previous editions.

This is one of the strongest indicators of the confidence companies place in EQUIP AUTO and the commercial value they derive from the exhibition. The contribution of our international partners also plays an important role in this success.

In Türkiye, for example, the initiatives we undertake with OSS and the Promosalons network are generating very strong interest. This demonstrates that EQUIP AUTO continues to retain its appeal among international companies.

With the new exhibition format, themed villages, expanded content encompassing the full range of mobility solutions, our vision for innovation and sustainability, and our international growth strategy, we are preparing for the 2027 edition with great confidence and enthusiasm.

Our objective is not simply to organise a larger exhibition. Our primary goal is to deliver an event that is more useful, more inspiring and generates greater added value for the international automotive industry.

As the European exhibition industry evolves rapidly, how do you assess the future of physical trade fairs and EQUIP AUTO Paris's role within this ecosystem?

Digital tools have become indispensable. However, no digital platform can completely replace face-to-face business meetings.

Strategic decisions, long-term partnerships and commercial relationships are founded above all on trust. Trust is built by meeting people in person, exchanging ideas and experiencing market developments first-hand.

Physical exhibitions will therefore continue to retain their importance. To do so, however, they must provide participants with genuine added value.

This added value must take the form of:

- High-quality content
- Technical demonstrations
- Conferences
- Networking areas
- New business development opportunities

This is precisely the vision of EQUIP AUTO.

We want to remain the first-choice platform for professionals seeking to:

- Understand the transformation taking place within their industries
- Expand their business networks
- Discover new technologies
- Establish the business partnerships of the future

As the world becomes increasingly digital, the value of human relationships continues to grow. Strong partners such as OSS make a substantial contribution to strengthening this international vision. Together, we bring professionals across the European automotive aftermarket closer to one another, foster cooperation between countries and contribute to our industry's transformation.

I firmly believe that Turkish companies will play an important role in this transformation. I am fully confident that EQUIP AUTO Paris 2027 will open a strong new chapter in cooperation between Türkiye and Europe.

The “Family Constitution Seminar” Was Held in Collaboration with OSS and Sistem Global

The OSS Association held the “Family Constitution Seminar” in collaboration with Sistem Global on Wednesday, 11 February 2026, with the participation of its members.

The event began with opening remarks by Mehmet Muştalı, Director at Sistem Global, and Beylem Leblebici Birsen, Member of the OSS Board of Directors. It continued with a comprehensive presentation by Başak Özkan Bulut, Attorney-at-Law and Director at Sistem Global.

The seminar addressed strengthening governance structures in family businesses, clearly defining family members' rights and responsibilities, and the critical role of a Family Constitution in ensuring companies' long-term sustainability. Participants gained valuable insights into balancing family relationships with corporate management and the key steps required throughout the institutionalisation process.



OSS Participated in the “Sustainability and Environmentally Responsible Approaches in the Automotive Industry” Seminar Held at the Istanbul Chamber of Commerce

The OSS Association participated in the seminar entitled “Sustainability and Environmentally Responsible Approaches in the Automotive Industry,” hosted by the Istanbul Chamber of Commerce (ITO) on Thursday, 15 January.

Chaired by Saim Aşçı, Chairman of the 52nd Professional Committee of the Istanbul Chamber of Commerce, the panel began with an opening address by Dr Salih Sami Atılğan, Member of the Istanbul Chamber of Commerce Board of Directors. Ali Özçete, Chairman of the OSS Board of Directors, participated as a speaker and shared his assessments of the automotive aftermarket and his views on sustainability with the attendees.

Prof. Dr Halit Keskin of Yıldız Technical University; Arda Arslan, Director of Bosch Automotive Aftermarket for Türkiye, Iran and the Middle East; and Hasan Erdoğan, Director of Mobility Solutions at TOFAŞ Türk Otomobil Fabrikası A.Ş., also contributed their knowledge and experience to the seminar.

The seminar addressed numerous key topics shaping the future of the automotive industry, including the impact of European Union and Chinese automotive policies on the sector, the green transition, carbon footprints, mobility solutions and environmentally responsible investments.



The Growing Pains of the Automotive Transformation

As electrification accelerates, geopolitical challenges are also emerging. Europe, the birthplace of the automobile, is coming under increasing pressure, while the entire ecosystem experiences the growing pains of transformation.

How have automotive aftermarket services evolved over time?

As the 140th anniversary of the first petrol-powered automobile is celebrated, every aspect of the automotive industry is being reshaped. Steam-powered and electric vehicles had already begun appearing on the roads before petrol-powered cars, but their numbers were very limited, and most people still relied on horses. It is also worth remembering that only the very wealthy could afford an automobile.

While the automobile—born in Europe—was initially a means of transport for a privileged minority, a man on the other side of the Atlantic took a major step towards democratising a vehicle that would later acquire far greater significance: Henry Ford. Through mass-production techniques, Ford claimed that even his workers would be able to own automobiles. As other manufacturers followed his example, production volumes, previously measured in thousands, reached millions.

However, there was no workshop and spare parts network as we know it today. In the early years, many manufacturers used common components, such as engines. Although this appeared to offer some advantages in terms of parts availability and repair, access to skilled technicians and replacement parts remained difficult under the conditions of the time.

Furthermore, many manufacturers delivered vehicles consisting only of a chassis and running gear, requiring customers to approach carriage and coachbuilders for the bodywork. In other words, the industry had not yet settled into an established structure. Electric vehicles, which held a 40% market share in the United States in 1900, even appeared to have an advantage in this respect. Their range was limited, but charging stations had been installed in some US cities.

Steam-powered vehicles had already lost their prospects, and the introduction of Cadillac's electric starter motor in 1912 effectively ended the initial era of electric vehicles as well. Petrol was inexpensive, and drivers no longer had to insert a crank into the front of the engine and turn it manually to start the vehicle.

Automobiles subsequently became a common sight on US roads, while the European industry began recovering from the devastating effects of the First World War. In 1925, Ford's 15 millionth Model T rolled off the production line, yet satisfactory progress had still not been made in workshop services and warranty practices.

In Europe, André Citroën adopted mass-production techniques and introduced workshop services offered at standardised prices across all locations. He thus became the first European manufacturer to implement a system resembling the one used today. Citroën's initiative influenced other brands, and customer satisfaction ceased to depend solely on vehicle performance, comfort and durability. After-sales services also became an area of competition.

Practices such as mechanical warranties, anti-corrosion warranties and extended warranties have since become commonplace. Throughout this process, independent repair workshops continued to operate, while suppliers of original and equivalent-quality spare parts steadily expanded their market presence.

How would you assess the current state of Türkiye's independent aftermarket?

There is one clear reality: parts and labour charges at authorised workshops are generally higher than those in the independent aftermarket and at independent workshops. Consumers therefore tend to use authorised workshops throughout the warranty period and switch to more affordable alternatives once the warranty expires.

This long-standing pattern is one of the principal factors enabling the independent aftermarket to maintain its strength. In addition to original parts, the availability of similarly high-quality but more affordable alternatives also provides consumers with financial relief.

Independent workshop chains operating according to defined standards position themselves between traditional repair shops and authorised workshops, offering advantages in service quality and corporate professionalism. As a result, solutions are available for virtually every budget.

Türkiye is a highly developed country in terms of its automotive supply industry. A wide variety of components are manufactured for numerous brands, both as original equipment and as equivalent aftermarket parts. Global brands also import products into Türkiye and manufacture locally. This gives consumers easy access to products across different price and quality categories.

The average age of Türkiye's vehicle parc is relatively high, which means demand for spare parts is also substantial. Moreover, parts supply for vehicles that could be considered very old will evidently need to continue for many more years.

Halit BOLKAN
Automotive Journalist



Türkiye has a highly developed automotive supply industry. A wide range of components is manufactured for numerous brands, both as original equipment and as equivalent aftermarket parts. Global brands also import products into Türkiye and manufacture locally. This gives consumers easy access to products across different price and quality segments.

Where is the current transformation taking the automotive industry?

It is often said that the automobile was born in Europe and grew up in the United States. Could it now be maturing in China?

Automotive measures to limit emissions in response to environmental concerns can be traced back to the final month of the 1950s, although global warming was not yet a major subject of discussion at the time. In December 1959, California introduced the first initiative to regulate exhaust emissions in response to air pollution in Los Angeles. The 1966 model year was established as the starting point for these emission restrictions. The Clean Air Act, which would apply across the United States, followed in 1963.

Europe introduced Euro emission standards in 1992, prompting European manufacturers to equip their new models with catalytic converters. As exhaust emission requirements became progressively stricter, the Chinese government began supporting the development of electric and hybrid vehicles in the early 2000s to address air pollution in major cities such as Beijing and Shanghai.

While intensive development of new energy vehicles (NEVs) was under way in the East, there was little substantial progress in the West apart from Tesla. European manufacturers were enjoying strong sales in China and other markets while concentrating on meeting increasingly stringent exhaust emission standards. Among Japanese manufacturers, Toyota was relatively comfortable with its full-hybrid technology. Tesla's remarkable growth and the technological level achieved by Chinese electric vehicle manufacturers profoundly affected the industry. When European tax incentives for electric and plug-in hybrid vehicles (PHEVs) were added to this equation, established European, American and Japanese manufacturers began to feel the pressure.

Many European brands in particular are now searching for ways to remain competitive in the new technology race, introducing measures ranging from laying off thousands of employees to closing factories. The general consensus is that the industry is currently experiencing the growing pains of the transition to electric vehicles.

This transformation will naturally take time and will not progress at the same rate in every part of the world. China remains the market undergoing this transition most rapidly—excluding Norway, which can be considered an exception due to its comparatively small market size. The collaboration between Toyota and BMW on hydrogen fuel-cell technology is noteworthy, although major questions remain regarding hydrogen refuelling infrastructure. The transition through full-hybrid, PHEV and electric vehicle technologies will continue for some time, but it appears that electric vehicles

will ultimately dominate. However, if the carbon-neutral synthetic fuel being developed by the Volkswagen Group proves successful, the transition could slow down, at least in Europe.

What are the geopolitical implications of this transformation?

One of the greatest advantages held by Chinese companies, which lead the global battery technology market, is not only their technological capability but also their access to lithium and the rare-earth elements used in battery and electric motor production.

Chinese companies are also involved in lithium mining across several countries, giving them a considerable advantage in terms of both access and pricing. European manufacturers are therefore developing electric motors that do not require rare-earth elements and exploring alternative battery technologies.

It is also important to emphasise that South Korean companies are very well positioned in this transformation. While Hyundai and Kia manufacture advanced electric vehicles, LG, SK On and Samsung have strong capabilities in battery chemistry development and production.

Until only a few years ago, China—with its rapid transition to NEVs—was an exceptionally profitable market for European manufacturers in particular. Today, it has become a market in which those same companies are struggling to maintain their positions.

In addition to its enormous domestic market, China is expanding aggressively into global markets through its vast manufacturing capacity. Its export activities and overseas manufacturing initiatives, sometimes described as an invasion rather than ordinary competition for market share, are setting off alarm bells in automotive manufacturing countries, particularly Germany. The resulting deterioration in the balance of trade between countries adds another dimension to the issue.

While the United States protects its domestic market through stricter measures, the European Union is attempting to create a mutually beneficial model through initiatives such as "Made in Europe." Türkiye has also pursued policies aimed at attracting investment. However, Chinese companies have shown a stronger preference for acquiring manufacturing facilities within EU member states or forming partnerships such as the Stellantis–Leapmotor collaboration.

How will these developments affect the independent aftermarket? What changes do you expect in the future?

In Türkiye, internal combustion engine vehicles currently on the road can be expected to remain in use for at least another 20 to 30 years—unless a substantial scrappage incentive accelerates the transition to electric vehicles. The number of vehicles with conventional powertrains will undoubtedly decline, but demand for servicing and spare parts will continue in the short and medium term. Nevertheless, all stakeholders in the independent aftermarket must begin preparing their transformation plans immediately and put them into action without delay. Electric vehicles contain far fewer components than internal combustion engine vehicles. This means the industry must pursue investment and development opportunities in areas such as software, battery recycling, applications, electric motors, sensors, radar systems and charging equipment. On the workshop side, investment in both equipment and personnel for electric vehicles is essential. During the transition period, conventional methods should also be replaced with AI-supported systems to reduce costs and improve sustainability.

By identifying future needs today and diversifying their products and services accordingly, companies can navigate this transition without suffering significant disruption.



The number of conventional vehicles will decline, but demand for servicing and spare parts will continue in the short to medium term. Nevertheless, all stakeholders in the independent aftermarket must begin preparing their transformation plans now and implement them without delay.

AKSAM

SATIŞ SONRASİ SINIRLI BÜYÜME BEKLİYOR

OSS ilk çeyrek anketine göre satış sonrasında durgunluk devam ederken sınırlı büyüme bekleniyor. Üreticilerin yüzde 23,7'si bu yıl yeni yatırım yapmayı planlıyor.



Maliyet baskısı yüksek

OSS Yönetim Kurulu Başkanı Ali Özçete, 2025 yılının ilk çeyreğine ilişkin değerlendirmesinde, sektörün temkinli bir görünüm sergilediğini, "Petrol ve petrokimya kaynaklı girdilerde yaşanan maliyet artışları, başta plastik ham maddeler olmak üzere birçok kaleme ciddi bir baskı oluşturmuyor" dedi.

OTOMOTİV satış sonrası pazarında yaşanan 2025 yılındaki durağan seyrin, 2026'nın ilk çeyreğinde de yansısı. Yılın ilk çeyreğinde satış, ihracat ve ithalatın da yatay seyrini sürdüren sektör, yılın ikinci çeyreğinde de küçük miktarda büyüme bekliyor. Otomotiv Satış Sonrası Ürün ve Hizmetleri Derneği'nin (OSS) 2026 Yılı

Birinci Çeyrek Sektörel Değerlendirme Anketi'ne göre, yılın ilk çeyreğinde, 2025'in aynı dönemine göre yurt içi satışlarda dolar bazında ortalama yüzde 0,35'lik artış yaşandı. Üretici üyelerin sadece yüzde 23,7'si önümüzdeki üç ayda yatırım planlarken, gözlemlenen problemlerin başında 'maliyetlerdeki aşırı artış' geliyor.

Bloomberg



MOBİLİTE GÜNDEMİ OSS DERNEĞİ/ALİ ÖZÇETE: SEKTÖR OLARAK EN BÜYÜK İHRACATIMIZI AVRUPA'YA GERÇEKLEŞTİRİYORUZ

BAŞLIKLAR

- Bessent: Her zaman güçlü dolar politikasını destekliyorum
- Trump: (Warsh hakkında) sınırlı o zaten faizleri indirmek istiyor
- ABD Başkanı Trump: İran lideri şimdi çok endişeli olmalı
- ABD-İran görüşmeleri 6 Şubat'ta Umman'da yapılacak

Bloomberg	ICBCT	ICUGS	IDGYO
5 Şub 12:07	14,33 % 0,42	2,68 % 0,74	4
@BloombergHT	BIST 100 15.039,42 % 0,46	DOLAR / TL 43,5392 % 0,08	FAİZ 10Y % 29,99 0,22
	BITCOIN 71.321,56 % 1,80	USD/AUD 1,4350 % 0,42	NAS FUT 24.995,50 % 0,01

OSS Başkanı Ali ÖZÇETE'nin 05.02.2026 tarihli Bloomberg HT Kanalı Mobilité Gündemi Programı

DÜNYA

Otoda satış sonrası pazar 10.2 milyar dolara ulaştı

Otomotiv Satış Sonrası Ürün ve Hizmetleri Derneği (OSS), "2025 Yılı Türkiye Otomotiv Satış Sonrası Pazarının Stratejik Analizi" raporunu yayımladı. Rapora göre, Türkiye'de binek otomobil ve hafif ticari araçlardan oluşan toplam hafif araç parkı 2025 itibarıyla 22 milyon 826 bin 24 adede ulaştı. Aynı dönemde satış sonrası pazarının hafif araçlar kapsamındaki geliri ise 7 milyar 567 milyon dolar olarak gerçekleşti. Orta ve ağır ticari araçlar da eklendiğinde bu rakam 10.2 milyar dolara ulaştı. Böylece satış sonrası gelir, 2023-2025 döneminde araç parkındaki büyümeden daha hızlı artış gösterdi. 2023 yılında 6 milyar 466 milyon dolar seviyesinde olan satış sonrası gelir, 2025 yılında 7 milyar 567 milyon dolara yükselirken, aynı dönemde satış sonrası gelirde yıllık bileşik büyüme oranı yüzde 8,2 oldu. Araç parkı ise aynı dönemde yüzde 6,3 yıllık bileşik büyüme ile 20 milyon 211 bin 6 adetten 22 milyon 826 bin 24 adede ulaştı.

OTOMOTİV SATIŞ SONRASİ PAZARI

BAŞLIKLAR

- Bessent: Her zaman güçlü dolar politikasını destekliyorum
- Trump: (Warsh hakkında) sınırlı o zaten faizleri indirmek istiyor
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Ali ÖZÇETE - Araba Sevdası Programı Canlı Yayını 19.02.2026 (A Para Kanalı)

SÖZCÜ

Yedek parçada ZAM YOLA ÇIKTI

Otomotiv Satış Sonrası Ürün ve Hizmetleri Derneği'nin (OSS) 2026 Yılı Birinci Çeyrek Sektörel Değerlendirme Anketi'ne göre, yılın ilk çeyreğinde, 2025'in aynı dönemine göre yurt içi satışlarda dolar bazında ortalama yüzde 0,35'lik artış yaşandı. 2026'nın ilk çeyreğinde gözlemlenen problemlerin başında 'maliyetlerdeki aşırı artış' geldi. Ankette göre, 'nakit akışında yaşanan problemler' ile 'iş ve ciro kaybı' üyeler için önemli sorunlar arasında yer alıyor. OSS Yönetim Kurulu Başkanı Ali Özçete, "Maliyetlerde artış yaşanmasına rağmen bu artışlar henüz fiyatlara tam olarak yansımış değil. Özellikle mobilite artışı döneme giren bu durum, araç bakımını yaptırmak isteyen son kullanıcılar için önemli bir fırsat sunuyor" dedi.

EKOTÜRK

OTOMOTİV SATIŞ SONRASİ SEKTÖRÜNE BAKIŞ

BAŞLIKLAR

- Bessent: Her zaman güçlü dolar politikasını destekliyorum
- Trump: (Warsh hakkında) sınırlı o zaten faizleri indirmek istiyor
- ABD Başkanı Trump: İran lideri şimdi çok endişeli olmalı
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OSS Başkanı Ali ÖZÇETE 05.01.2026 tarihli EKOTÜRK - Sektörel Bakış programına konuk oldu.

Yeni Şafak

Artan maliyet bakımı erteletiyor

Türk otomotiv parça üreticileri stokların artışı ve artan maliyetlerin bakımın erteleştirildiğini belirtti. OSS Başkanı Ali Özçete, "Stok verilerine baktığımızda, yeni araç parkuna yönelik ürünlerde hareketlilik devam ederken, özellikle 20 yaş üstü araçlarda ait yedek parçalarda belirgin bir yavaşlama gözlemleniyor" açıklamasını yaptı.

Otomotiv Satış Sonrası Ürün ve Hizmetleri Derneği (OSS), "2025 Yılı Birinci Çeyrek Sektörel Değerlendirme Anketi"ne göre, yılın ilk çeyreğinde, 2025'in aynı dönemine göre yurt içi satışlarda dolar bazında ortalama yüzde 0,35'lik artış yaşandı. 2026'nın ilk çeyreğinde gözlemlenen problemlerin başında 'maliyetlerdeki aşırı artış' geldi. Ankette göre, 'nakit akışında yaşanan problemler' ile 'iş ve ciro kaybı' üyeler için önemli sorunlar arasında yer alıyor. OSS Yönetim Kurulu Başkanı Ali Özçete, "Maliyetlerde artış yaşanmasına rağmen bu artışlar henüz fiyatlara tam olarak yansımış değil. Özellikle mobilite artışı döneme giren bu durum, araç bakımını yaptırmak isteyen son kullanıcılar için önemli bir fırsat sunuyor" dedi.

OTOMOTİV SATIŞ SONRASİ SEKTÖRÜNE BAKIŞ

BAŞLIKLAR

- Bessent: Her zaman güçlü dolar politikasını destekliyorum
- Trump: (Warsh hakkında) sınırlı o zaten faizleri indirmek istiyor
- ABD Başkanı Trump: İran lideri şimdi çok endişeli olmalı
- ABD-İran görüşmeleri 6 Şubat'ta Umman'da yapılacak

Bloomberg	ICBCT	ICUGS	IDGYO
5 Şub 12:07	14,33 % 0,42	2,68 % 0,74	4
@BloombergHT	BIST 100 15.039,42 % 0,46	DOLAR / TL 43,5392 % 0,08	FAİZ 10Y % 29,99 0,22
	BITCOIN 71.321,56 % 1,80	USD/AUD 1,4350 % 0,42	NAS FUT 24.995,50 % 0,01

TRT RADYO - Ali ÖZÇETE 12.02.2026

İŞTE BUNU KONUŞALIM

BAŞLIKLAR

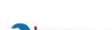
- Bessent: Her zaman güçlü dolar politikasını destekliyorum
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ST Endüstri Radyo - İşte Bunu Konuşalım Programı 21.04.2026

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