



PRESIDENCY OF  
THE REPUBLIC OF TÜRKİYE  
**INVESTMENT  
OFFICE**

# **WHITE GOODS** **HVAC, HOME** **APPLIANCES INDUSTRY** **OVERVIEW**

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**INVEST.GOV.TR**

November 2022

# AGENDA



## **1** WHITE GOODS PRODUCTION



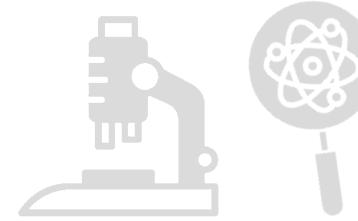
## **2** SMALL HOME APPLIANCE PRODUCTIONS



## **3** HVAC PRODUCTION



## **4** PATENTS IN DURABLE CONSUMER GOODS AND HVAC



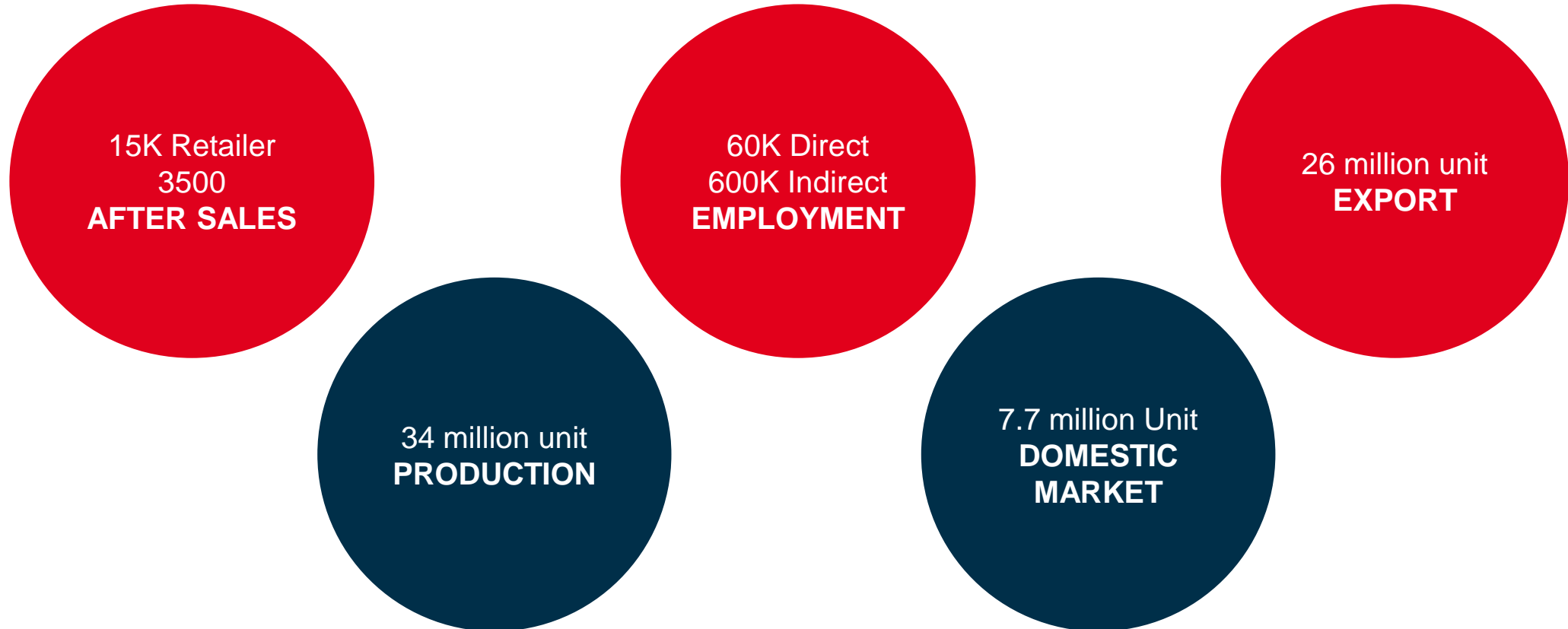
## **5** R&D CENTERS IN DURABLE CONSUMER GOODS AND HVAC

# WHITE GOODS PRODUCTION IN TÜRKİYE

TÜRKİYE IS THE 2th LARGEST PRODUCTION BASE IN THE WORLD  
WITH %7 OF WORLD WHITE GOODS PRODUCTION



## KEY TAKEAWAYS



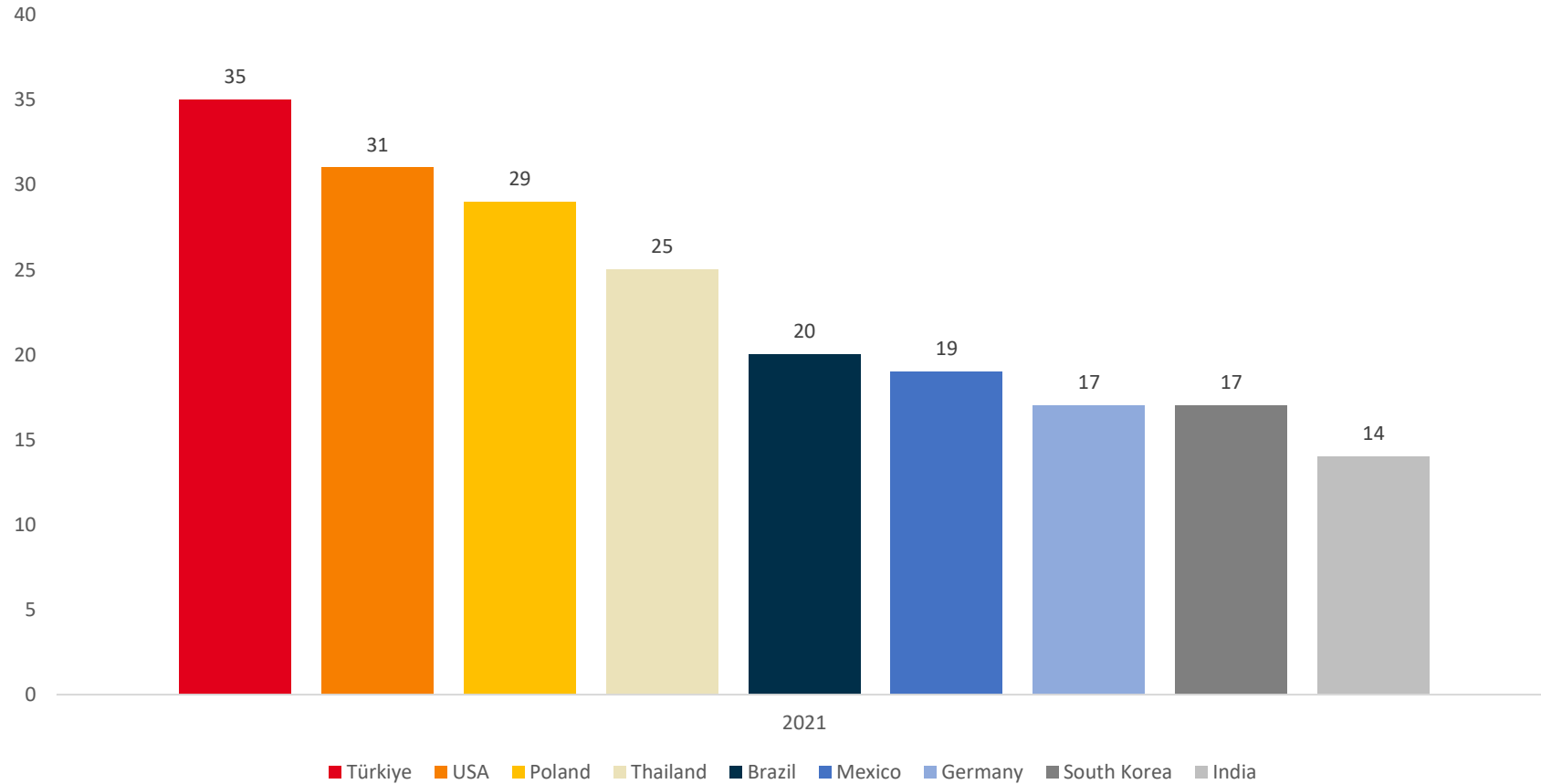
# WHITE GOODS PRODUCTION IN TÜRKİYE

TÜRKİYE IS THE SECOND LARGEST PRODUCER IN THE SECTOR



## MAJOR DOMESTIC APPLIANCES GLOBAL PRODUCTION (MILLION UNITS)

\*China Excluded (275 Million Units)



# WHITE GOODS PRODUCTION IN TÜRKİYE

TURKEY IS THE LARGEST WHITE GOODS PRODUCER IN EUROPE AND 2<sup>nd</sup> LARGEST IN THE WORLD WITH A TOTAL OF ALMOST 60,000 EMPLOYEES....



There are nine significant white good companies that have production facilities in Turkey:



Turkish white goods industry exports 75% of its production, mostly to European countries.



- Arçelik offers a wide product range with 12 brands (Arçelik, Beko, Grundig etc.). Arçelik A.Ş. is active in more than 100 countries including China and the United States through its 13 international subsidiaries and over 4,500 branches in Turkey. The company operates 15 production plants in the world.



- Vestel Group of Companies is comprised of a total of 24 companies, 16 of which are located overseas. With 20,000 employees including 1,800 R&D staff, we are engaged in efforts that shape our industry. We are bringing our technology to 158 countries of the world.



- The Group, one of the largest white goods manufacturers in Europe, moved its factory in China to Turkey with an investment of 70 million euros. Candy Haier Qingdao Haier as officially completed the acquisition of the Candy Hoover Group in 2019.



- Kumtel has been among Turkey's top 500 industrial firms since 2005. In 2016, the company expanded its production and opened a home appliances factory in Ethiopia.



- Simfer is one of the leading Turkish manufacturer of home appliances with exporting to more than 150 countries and is placed in top 500 industrial corporations in Turkey with a 6 million unit annual production capacity.



- BSH Group's largest manufacturing center is located in Çerkezköy, just 80 miles from Istanbul. They serve with main brands (Bosch, Siemens), special brands (Gaggenau) and local brand (Profilo).



- Whirlpool manufacturing mainly refrigerator and washing machine with Hotpoint, Whirlpool and Indesit brands. Arcelik signed an agreement to acquire Whirlpool's enterprise in Manisa.(May 2021)



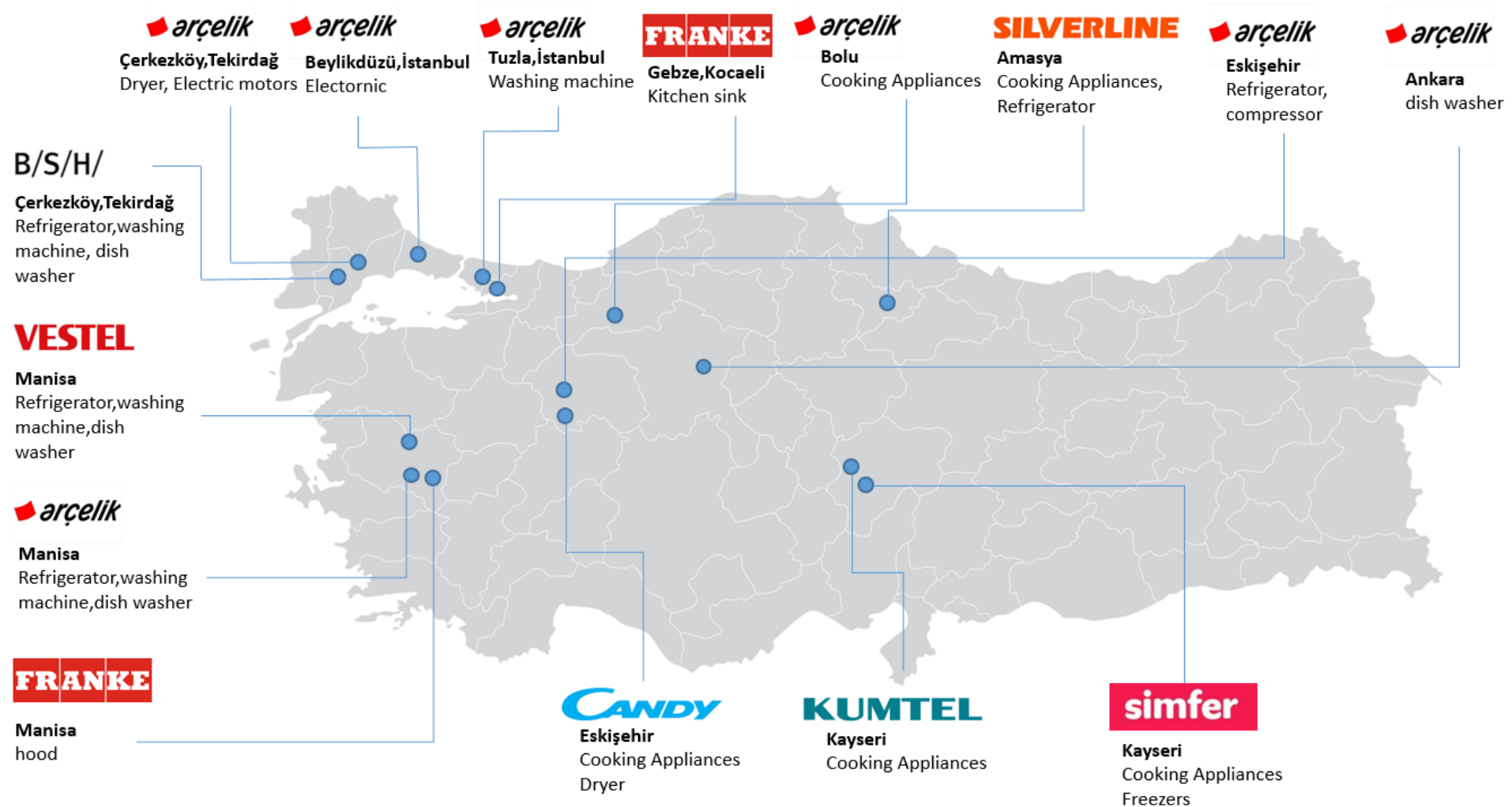
- Franke completed the acquisition of the Faber Group in 2004. Franke opened its factory in Manisa with 1.5 million product capacity that is 5<sup>th</sup> biggest production in the world.



- Silverline exports to more than 70 countries. The company is one of the top five hood manufacturers in Europe and one of the top ten in the world and has an annual production volume of 2.3 million.

# WHITE GOODS PRODUCTION IN TÜRKİYE

BELOW MAP SHOWS LOCATION AND PRODUCT LINES OF THE FACILITIES. ISTANBUL, TEKIRDAG, MANISA, ANKARA, ESKİSEHIR — AND KAYSERİ HAVE EVOLVED TO BE CLUSTERS FOR WHITE GOODS PRODUCTION.



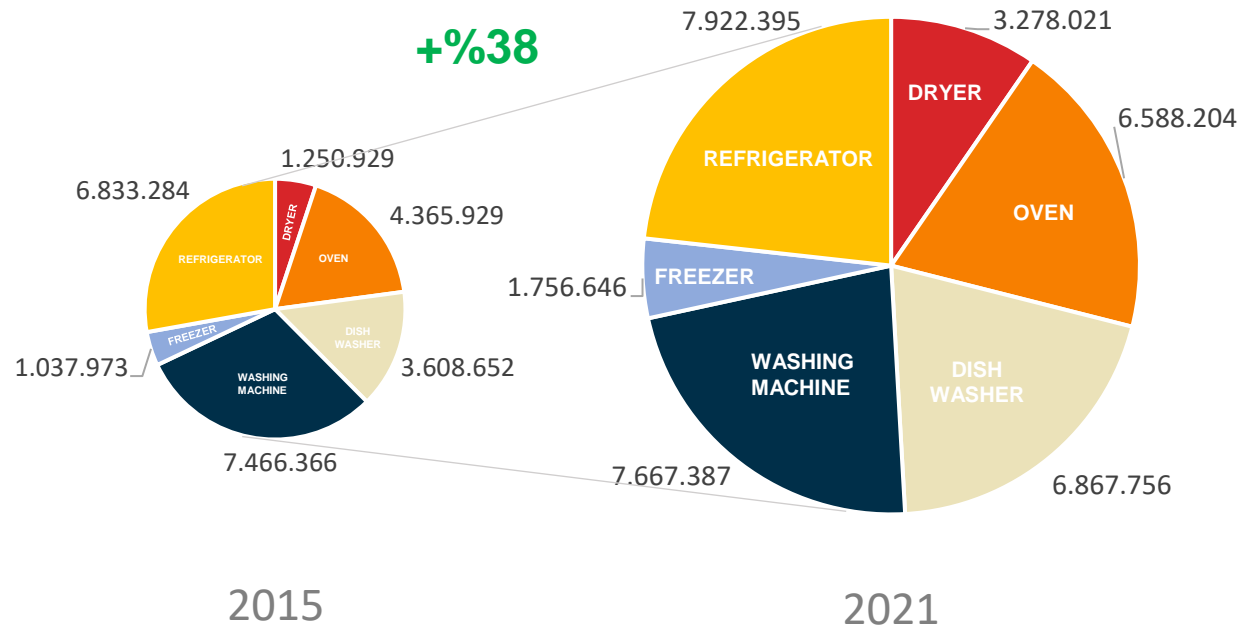
# WHITE GOODS IN THE LAST 5 YEARS

## PRODUCTION, EXPORT AND DOMESTIC SALES OF 6 MAIN PRODUCTS

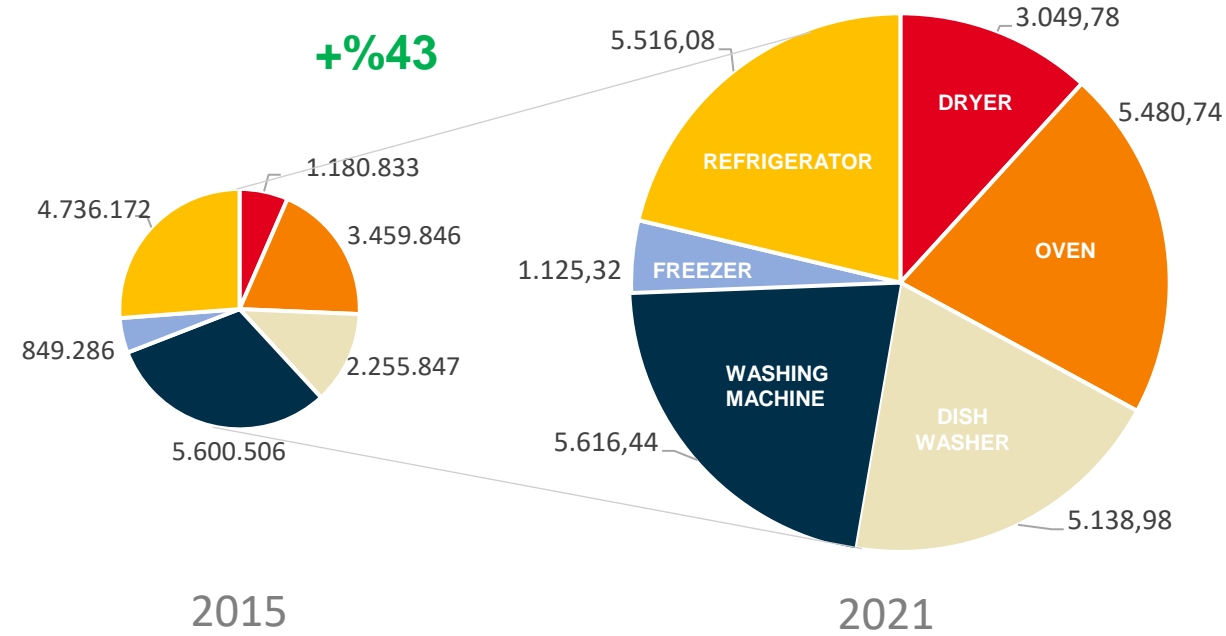


### PRODUCTION AND EXPORT CAPACITY INCREASED IN 5 YEARS (UNIT)

#### PRODUCTION (UNIT)



#### EXPORT (UNIT)

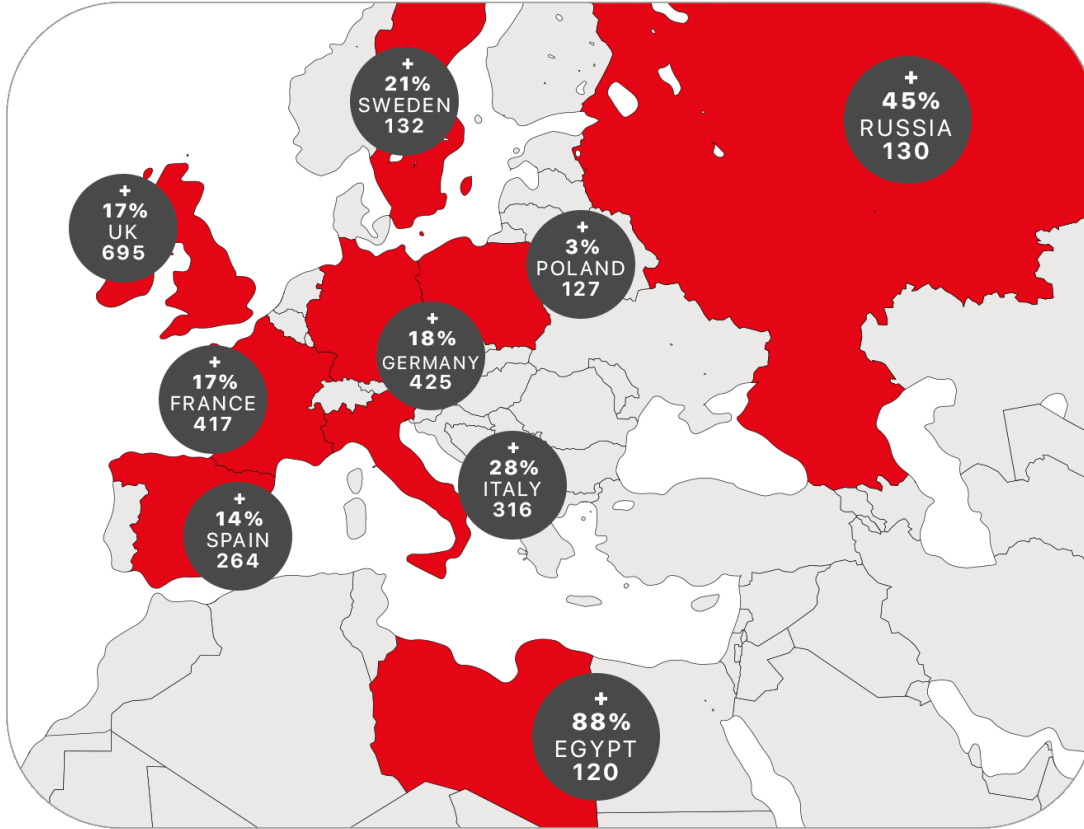


# WHITE GOODS IN THE LAST 5 YEARS

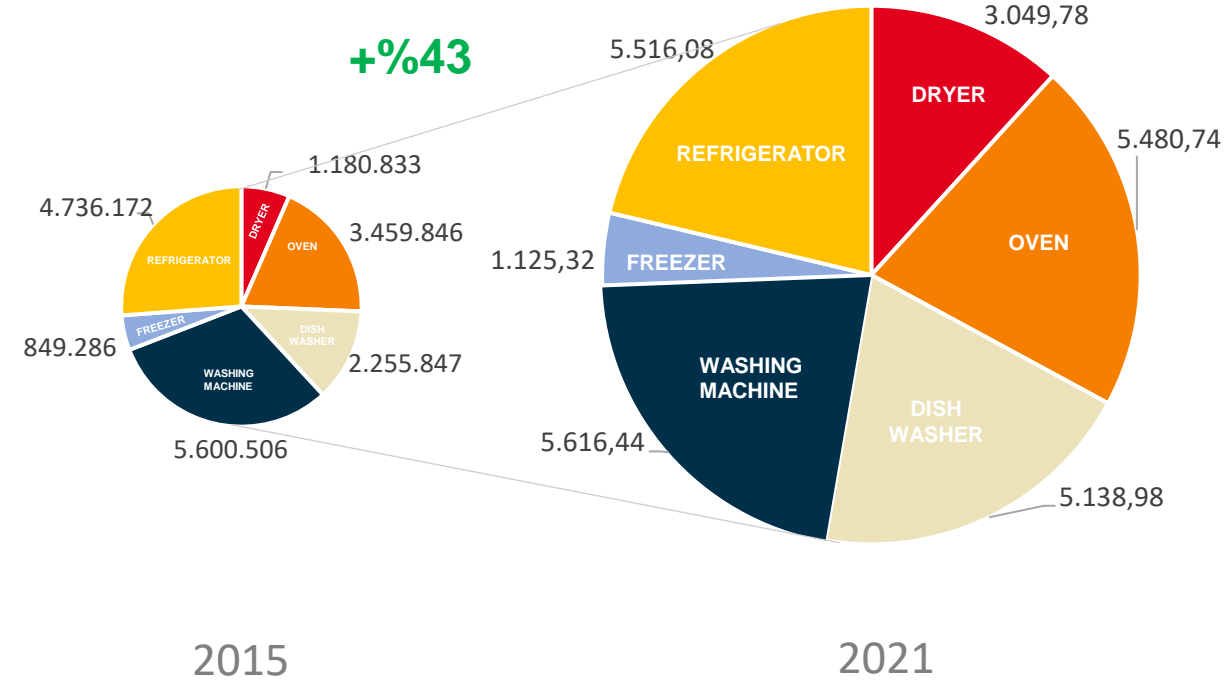
## EXPORT OF 6 MAIN PRODUCTS



### TÜRKİYE WHITE GOODS EXPORT



### EXPORT (UNIT)





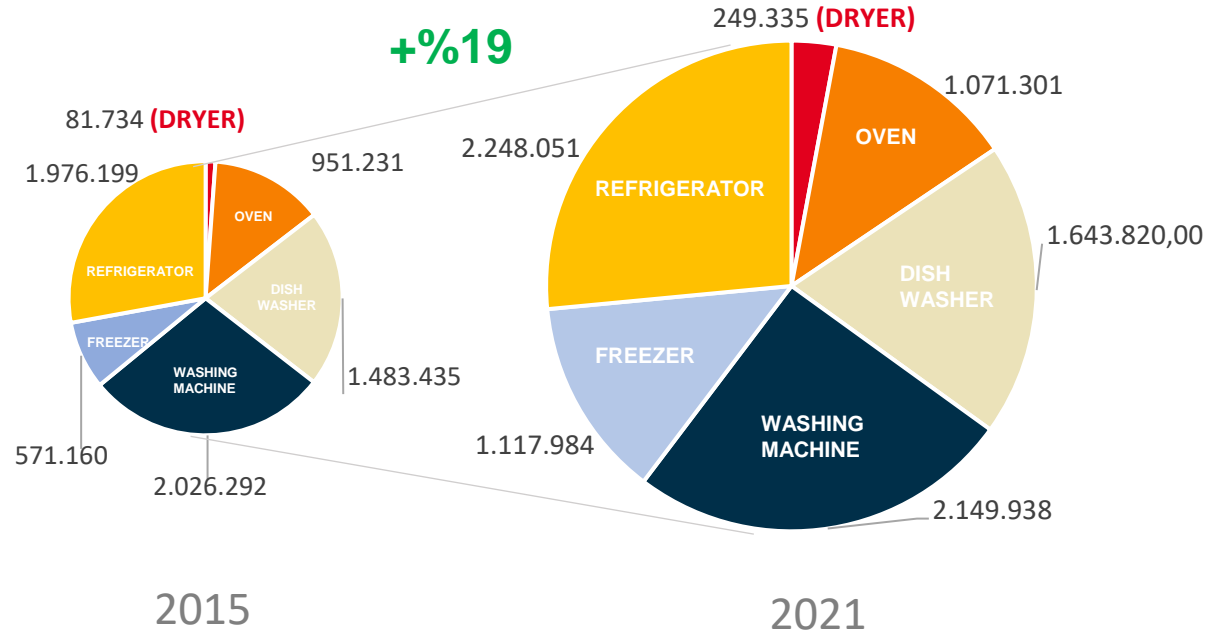
# WHITE GOODS IN THE LAST 5 YEARS

## PRODUCTION, EXPORT AND DOMESTIC SALES OF 6 MAIN PRODUCTS



### DOMESTIC SALES INCREASED IN 5 YEARS

#### DOMESTIC SALES (UNIT)



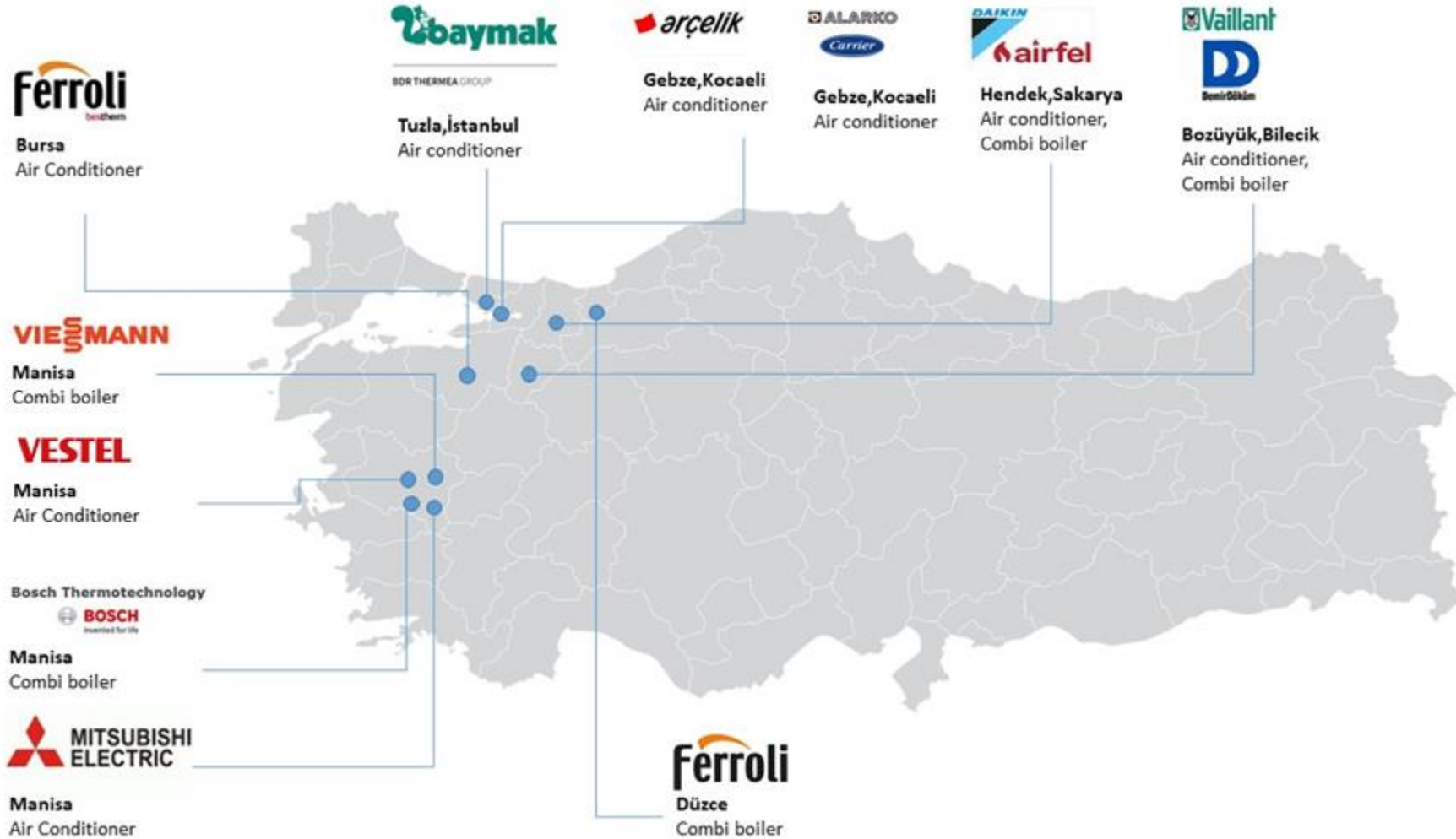
With its production capacity of **25 million units**, Turkish white goods industry has become a significant focus of production in the last 10 years and Türkiye has become **the 1st country in Europe** in the white goods sector.

The Turkish market used to sell 6.5 million units in domestic sales in the 2011; however, in the last 10 years, achieved a record by rising up to 24 million units by the end of 2021.

The white goods companies operating in Türkiye are making significant investments in the R&D area. As a result of developments, improvements in the energy efficiency of the products have reached up to 65% in the last 10 years.

# HVAC PRODUCTION IN TÜRKİYE

TÜRKİYE HAS A STRONG INDUSTRIAL BASE WITH A TOTAL PRODUCTION VALUE OF USD 3.2 BILLION...



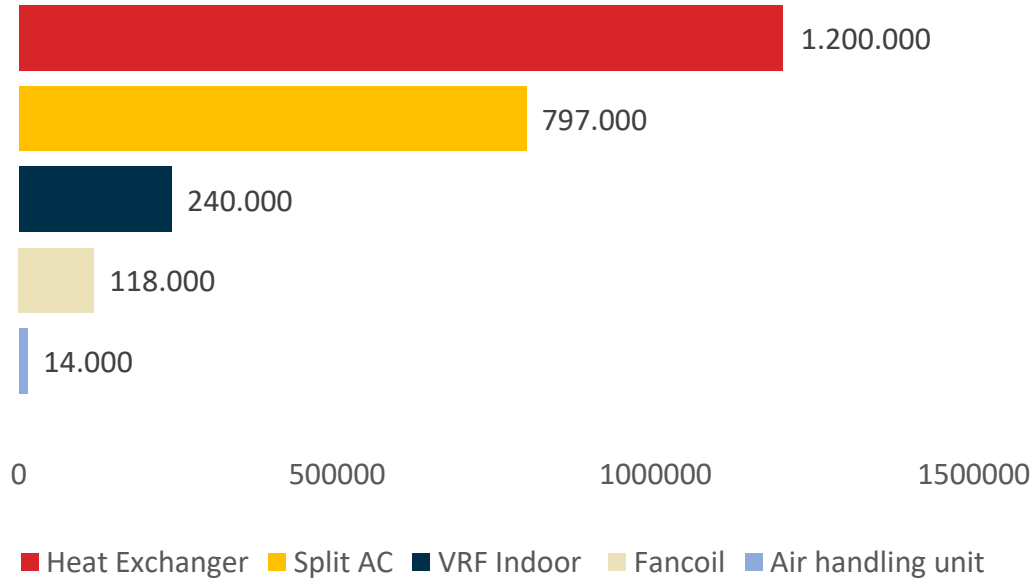
- Türkiye is Europe's manufacturing base for panel radiator, boiler and AHU's.
- The sector in the last ten years to reach USD 1.9 Billion.
- Europe has over 40% share.

# HVAC PRODUCTION IN TÜRKİYE

TÜRKİYE HAS A STRONG INDUSTRIAL BASE WITH A TOTAL PRODUCTION VALUE OF USD 3.2 BILLION...



## PRODUCTION CAPACITIES FOR SOME PRODUCTS (UNIT)



In addition to the major manufacturers there are some companies which are focusing to manufacture **commercial refrigerators** as well as deep-freezers in Türkiye.



# SMALL HOME APPLIANCES PRODUCTION IN TÜRKİYE

TÜRKİYE HAS A STRONG INDUSTRIAL  
BASE WITH A TOTAL PRODUCTION VALUE  
OF 4.5 TL BILLION...

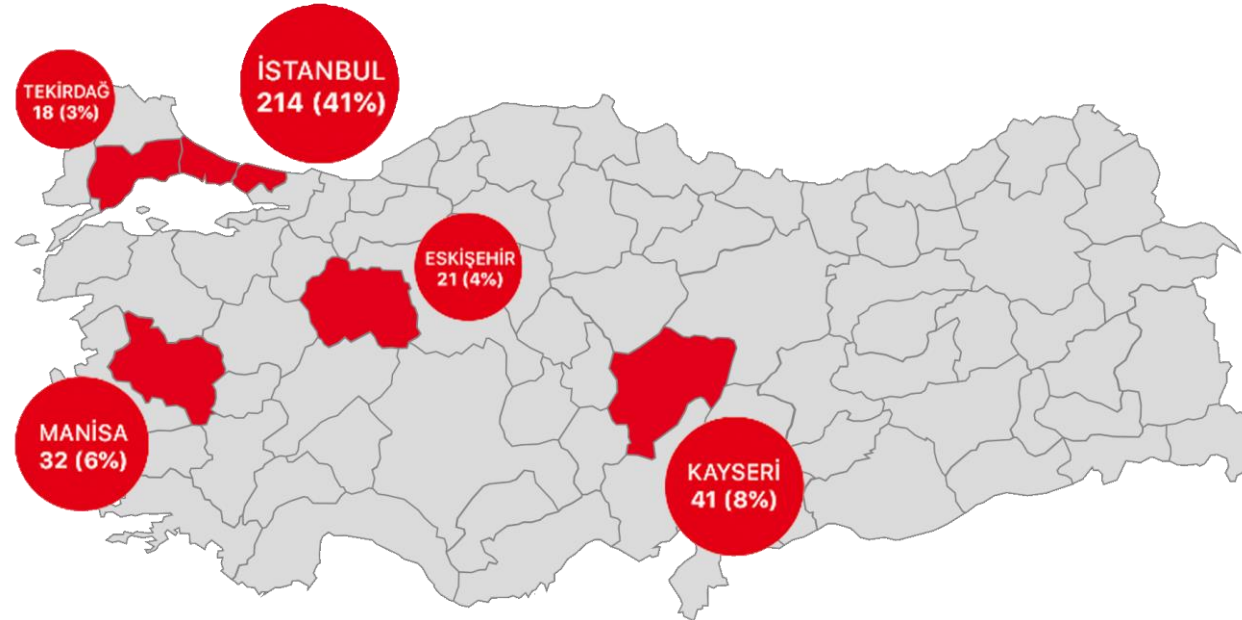


## KEY FACTS

- ➔ 4.5 billion TL total market size
- ➔ 80% capacity utilization rates
- ➔ 60% local market share in total sales
- ➔ 20K total employment

## MANUFACTURERS ARE MOST DENSELY LOCATED IN FIVE CITIES

Supply products for the production are mainly **flat steel, plastics, copper and aluminum**. Istanbul, Bursa, Tekirdag, Manisa, Ankara, Eskisehir, Konya and Kayseri are the clusters for the supply products.



40% of Türkiye's turnover is realized in the **Marmara Region** where SHA sector has grown more than **doubled between 2013-2018** from 2 billion TL to 4.5 billion TL.

# SMALL HOME APPLIANCES PRODUCTION IN TÜRKİYE

ISTANBUL, MANISA,ESKİSEHIR,TEKIRDAG  
AND KAYSERİ ARE THE CLUSTERS FOR  
THE PRODUCTION.

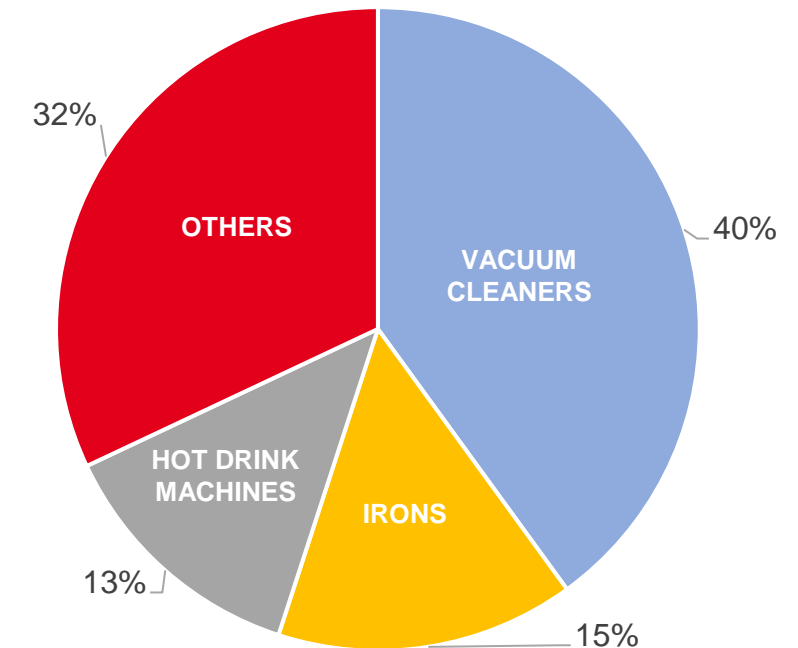


World exports of the small household appliances industry reached **USD 53 billion**. Türkiye's market size is **4.5 billion TL**. In 2018, 15.2 Mio small household appliances were sold.

## NUMBERS OF EMPLOYERS

City	Manufacturer	Engineer	Technician	Expert	Worker	Admin. Staff	Total
Istanbul	214	519	756	603	10.341	1.341	13.774
Manisa	32	300	203	141	9.650	594	10.920
Eskişehir	21	384	196	86	6.797	232	7.716
Tekirdağ	18	330	170	581	5.947	276	7.322
Kayseri	41	138	59	188	3.716	420	4.562
Türkiye	525	2.563	2.109	2.325	49.469	4.341	64.272

## MARKET SHARE (%)

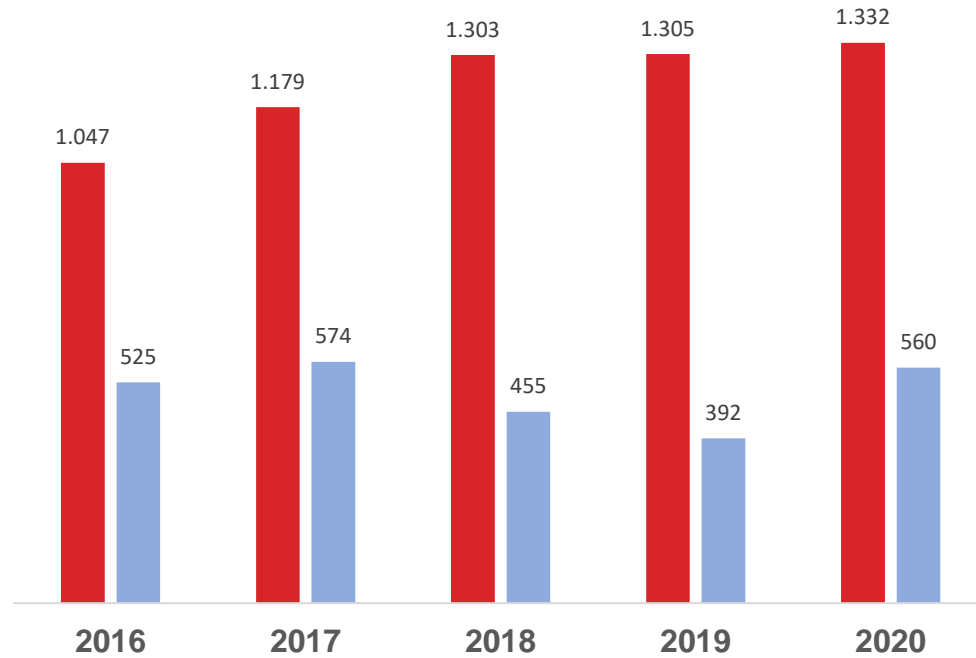


# SMALL HOME APPLIANCES PRODUCTION IN TÜRKİYE

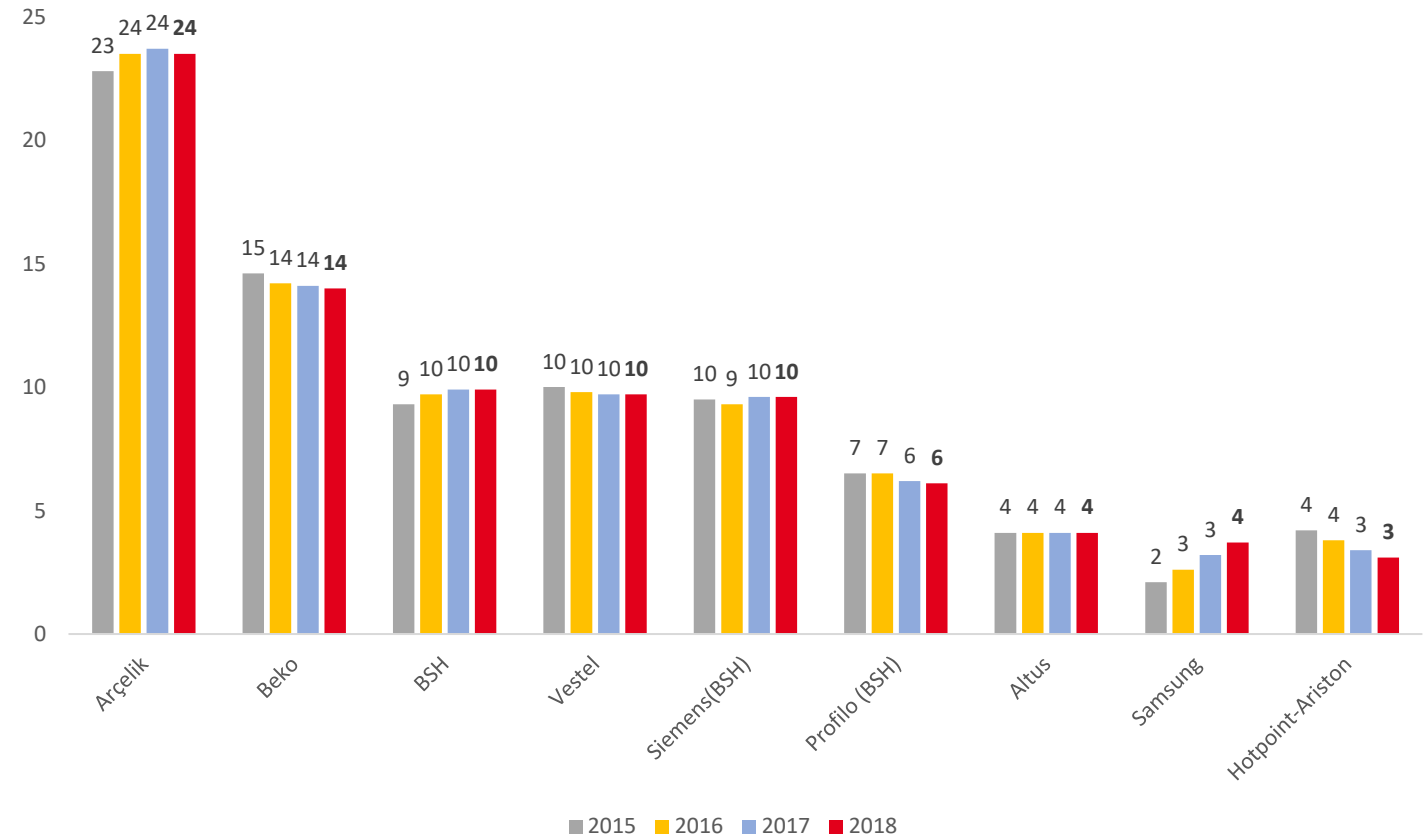
EXPORT OF SMALL HOME APPLIANCES  
INCREASED %15 IN THE LAST FOUR  
YEARS



## EXPORT & IMPORT



## MARKET VOLUME

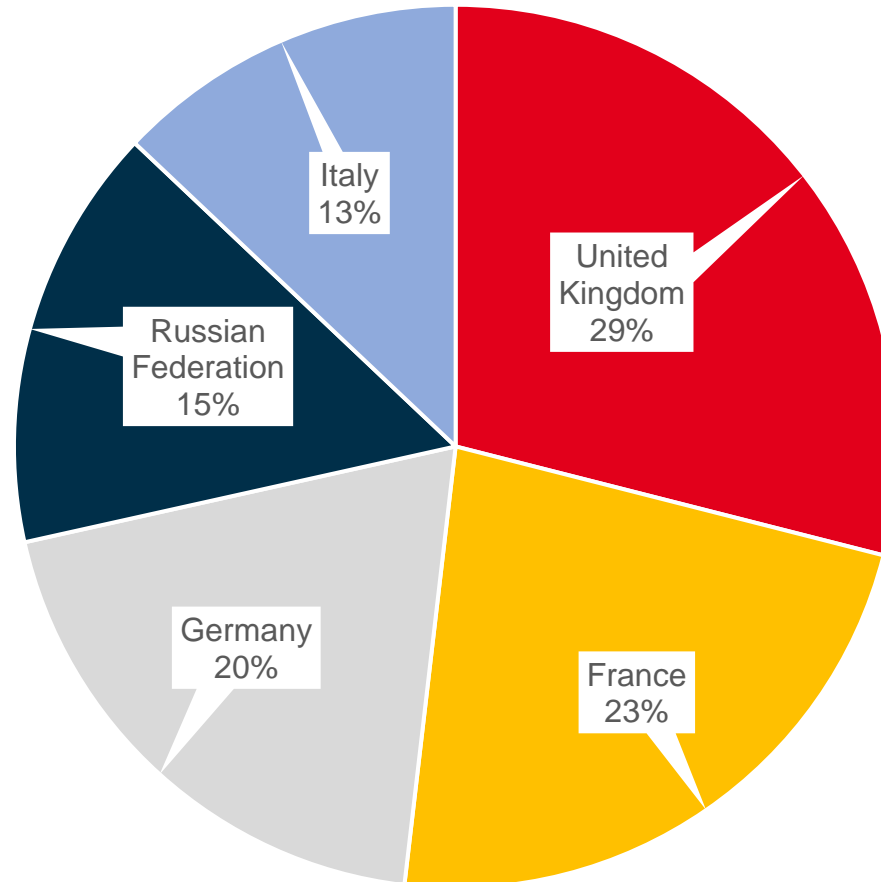


# SMALL HOME APPLIANCES PRODUCTION IN TÜRKİYE

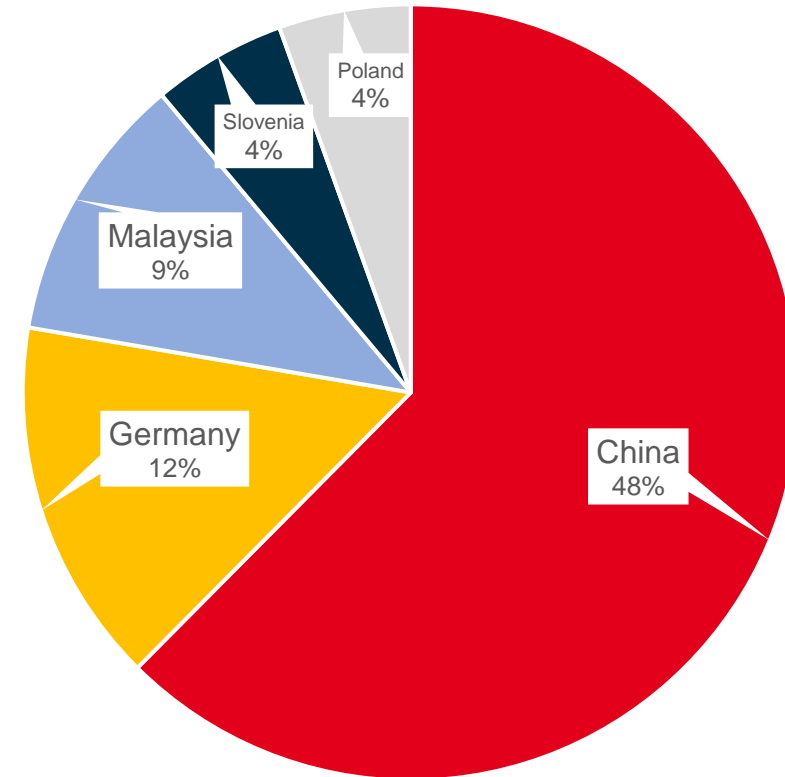
267 MILLION OUT OF \$ 560 MILLION IMPORTS WERE MADE FROM CHINA. CHINA'S SHARE IN TÜRKİYE'S IMPORTS IN 2020 IS 48%.



## EXPORT BY COUNTRIES(%)



## IMPORT BY COUNTRIES(%)





## RECENT INVESTMENTS IN WHITE GOODS AND HVAC PRODUCTION IN TÜRKİYE

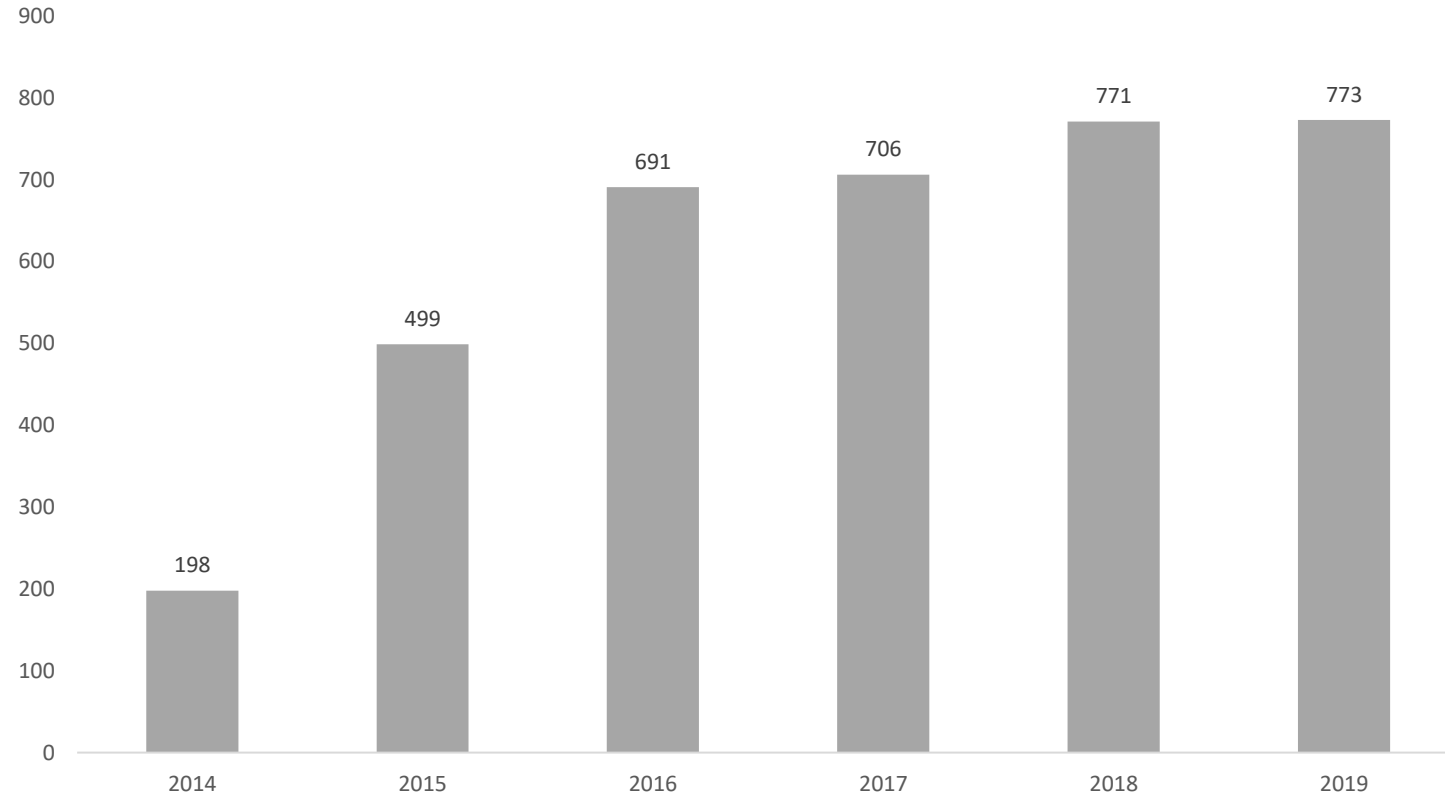
### MAJOR INVESTMENTS DONE IN THE RECENT YEARS FOR WHITE GOODS AND HVAC PRODUCTION IN TÜRKİYE:

2021: Arçelik – acquisition of Whirlpool Manisa production facility for <b>EUR 78.3 Million</b>	2019: Haier – acquisition of Candy Hoover Eskişehir production facility and expansion with <b>TRY 850 Million</b> investment	2018: Vestel - drying machine investment in Manisa production facility – <b>750K units</b>
2020: Whirlpool - modernization in Manisa production facility with <b>TRY 97 Million</b>	2019 and 2014: Franke – modernization in Manisa facility around <b>TRY 75 Million</b>	2018: Mitsubishi – USD 100 Million greenfield investment in Manisa for AC production
Investment 2019: Bestherm - Ferrol partnership in boiler production at Bursa facility at <b>EUR 5 Million</b>	2018 and 2013: BSH – modernization in Tekirdag production facility at almost <b>TRY 2 Billion</b>	2017 and 2014: Demirdöküm – modernization in Bozüyük production facility at TRY 52 Million





## PUBLISHED DOMESTIC PATENT APPLICATIONS BETWEEN 2010-2019 (UNIT)



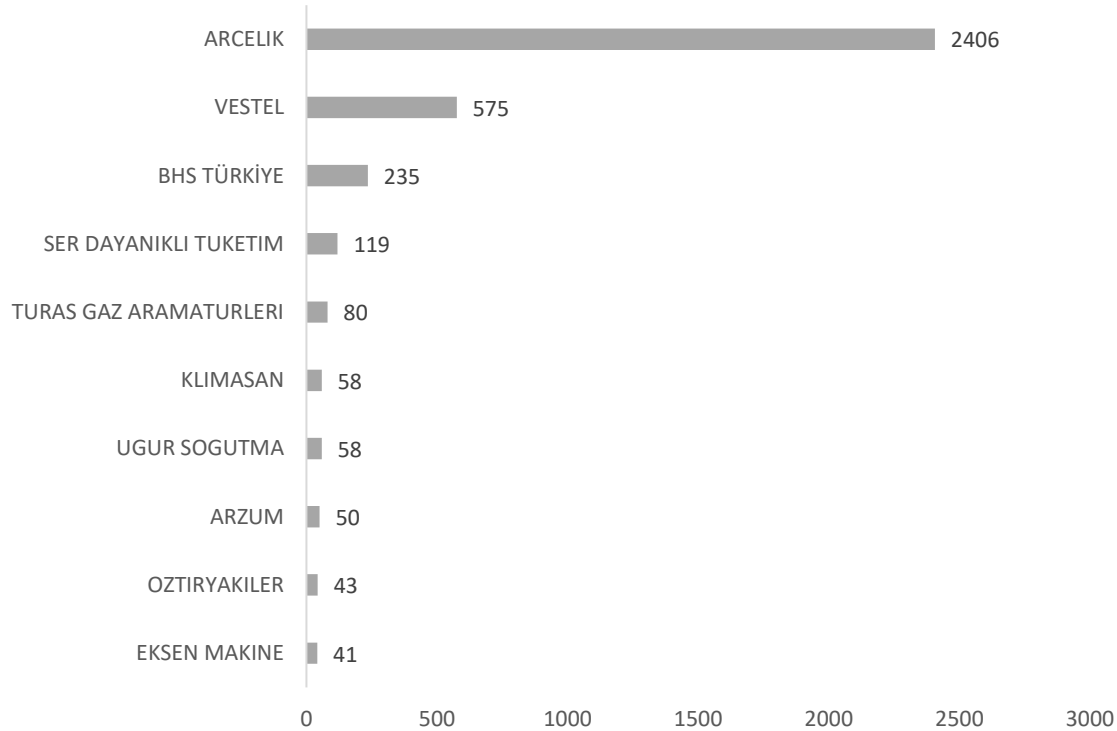
In the number of  
patents Arçelik  
ranks the first,  
Vestel is the  
second and BSH is third.

## PATENTS IN DURABLE CONSUMER GOODS AND HVAC PRODUCTION IN TÜRKİYE

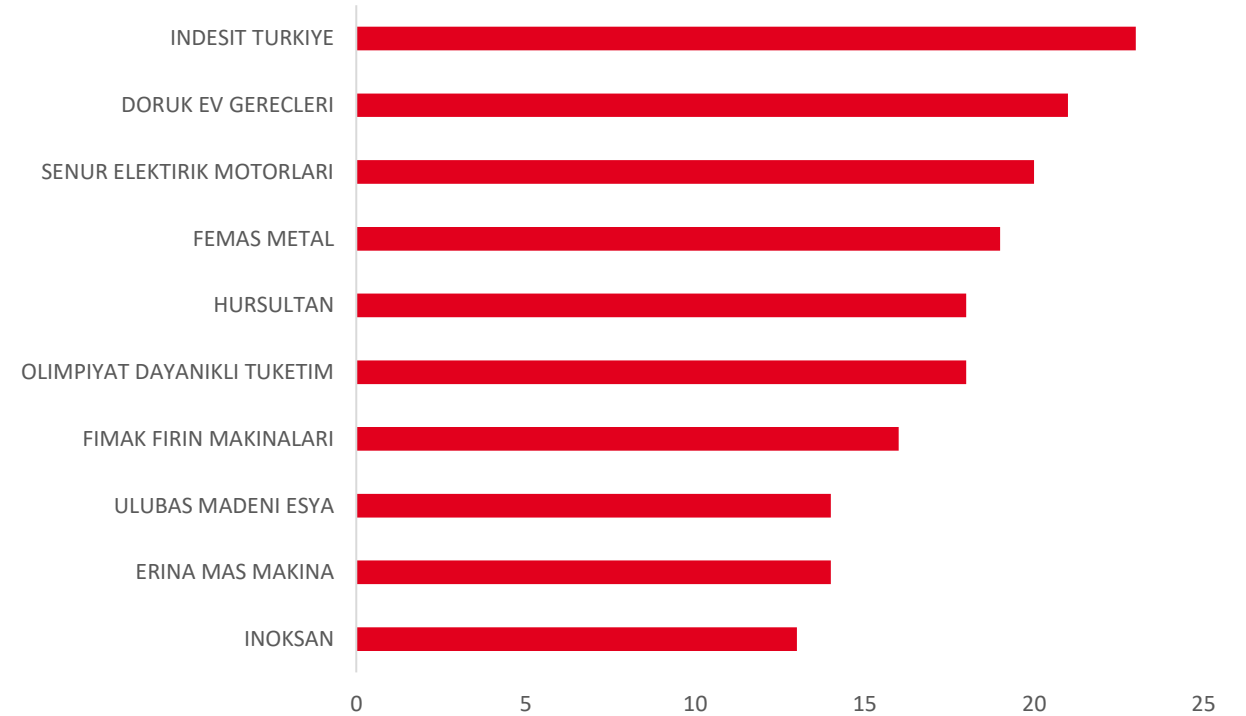
FROM 2010 TO 2019, THE NUMBER OF DOMESTIC PATENT APPLICATIONS IN THE FIELD OF WHITE GOODS AND HOUSEHOLD ELECTRICAL APPLIANCES INDUSTRY IN TÜRKİYE AMOUNTED TO 5,217



### TOP TEN DOMESTIC COMPANIES THAT PUBLISHED PATENT APPLICATIONS IN TÜRKİYE (UNIT)



### TOP TWENTY PATENT FILING COMPANIES IN DURABLE CONSUMER GOODS AND HOUSEHOLD ELECTRICAL APPLIANCES INDUSTRY (UNIT)



## R&D CENTERS IN DURABLE CONSUMER GOODS AND HVAC PRODUCTION IN TÜRKİYE

AS OF JUNE 2021, 21 OPERATIONAL R&D CENTER IN DURABLE CONSUMER GOODS INDUSTRY AND 18 OPERATIONAL R&D CENTER IN HVAC INDUSTRY...



### R&D CENTERS IN DURABLE CONSUMER GOODS



## R&D CENTERS IN DURABLE CONSUMER GOODS AND HVAC PRODUCTION IN TÜRKİYE

AS OF JUNE 2021, 21 OPERATIONAL R&D CENTER IN DURABLE CONSUMER GOODS INDUSTRY AND 18 OPERATIONAL R&D CENTER IN HVAC INDUSTRY...



### R&D CENTERS IN HVAC INDUSTRY





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**INVESTMENT  
OFFICE**

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