

2025
YEAR-END

**SECTORAL EVALUATION
SURVEY**





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This presentation was prepared by Bupar Research to present the findings of the research conducted with **OSS Association** members regarding the last quarter and the overall performance of 2025.

Purpose



The survey was conducted to scientifically determine the current sectoral conditions of OSS Association members and their attitudes and behaviors regarding current economic and social developments.



Members' opinions are collected via surveys, converted into statistical data, and shared quarterly.



The main objective is to objectively reflect the sector's trends and members' attitudes and behaviors based on the collected data, enabling OSS members to make more informed decisions in their areas of operation.

Method and Sample

This study was conducted using a standardized questionnaire. The questionnaire was digitized through software and sent to members via a link to be completed. Most of the questions were standardized, and additional questions related to current developments of the period were included.

In this context, the questionnaire was sent to a total of 284 members of the association. Of these, 142 are distributors and 142 are manufacturers.

Timing



Creation of the Questionnaire

01

December 24–26, 2025

December 29, 2025 – January 9, 2026

02

Fieldwork Process

Document Coding

03

January 12–13, 2026

January 14–15, 2026

04

Creation of Analysis Tables

PRESENTATION

05

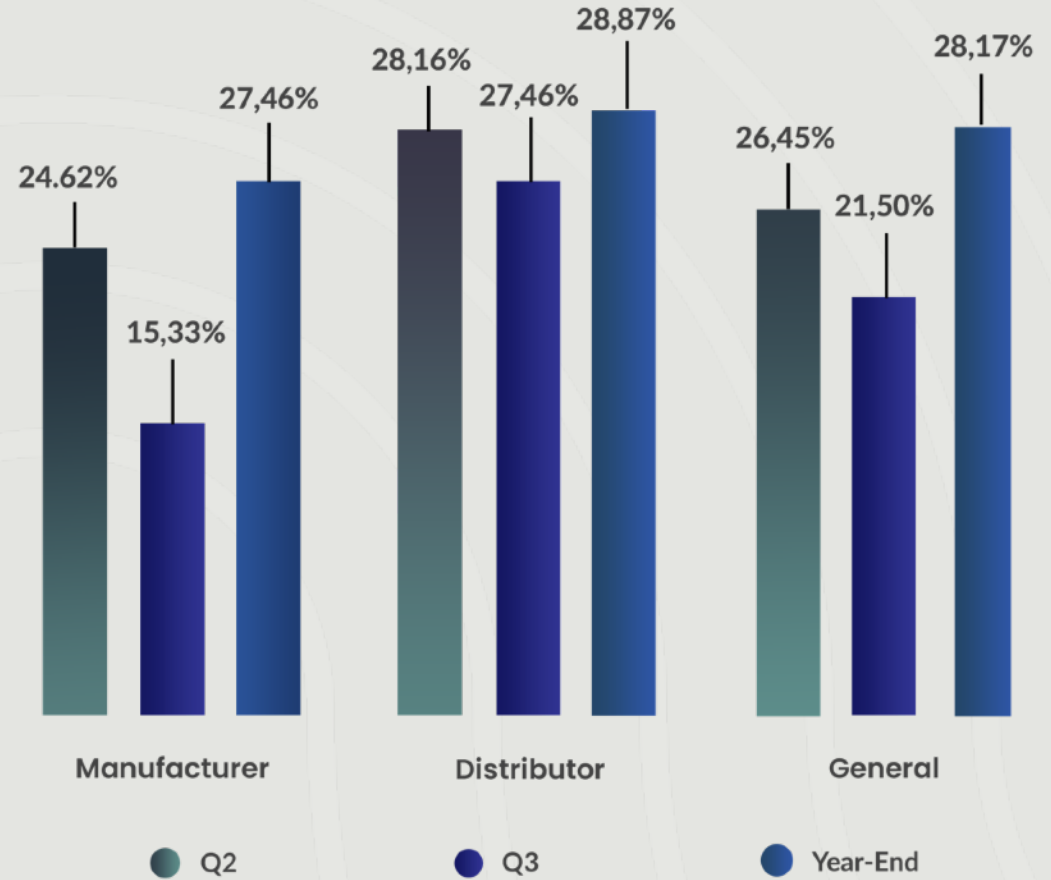
January 16, 2026

Findings

Survey Participation



Out of 284 OSS Association members, a **total of 80 members** participated in the survey, including 41 distributors and 39 manufacturers.



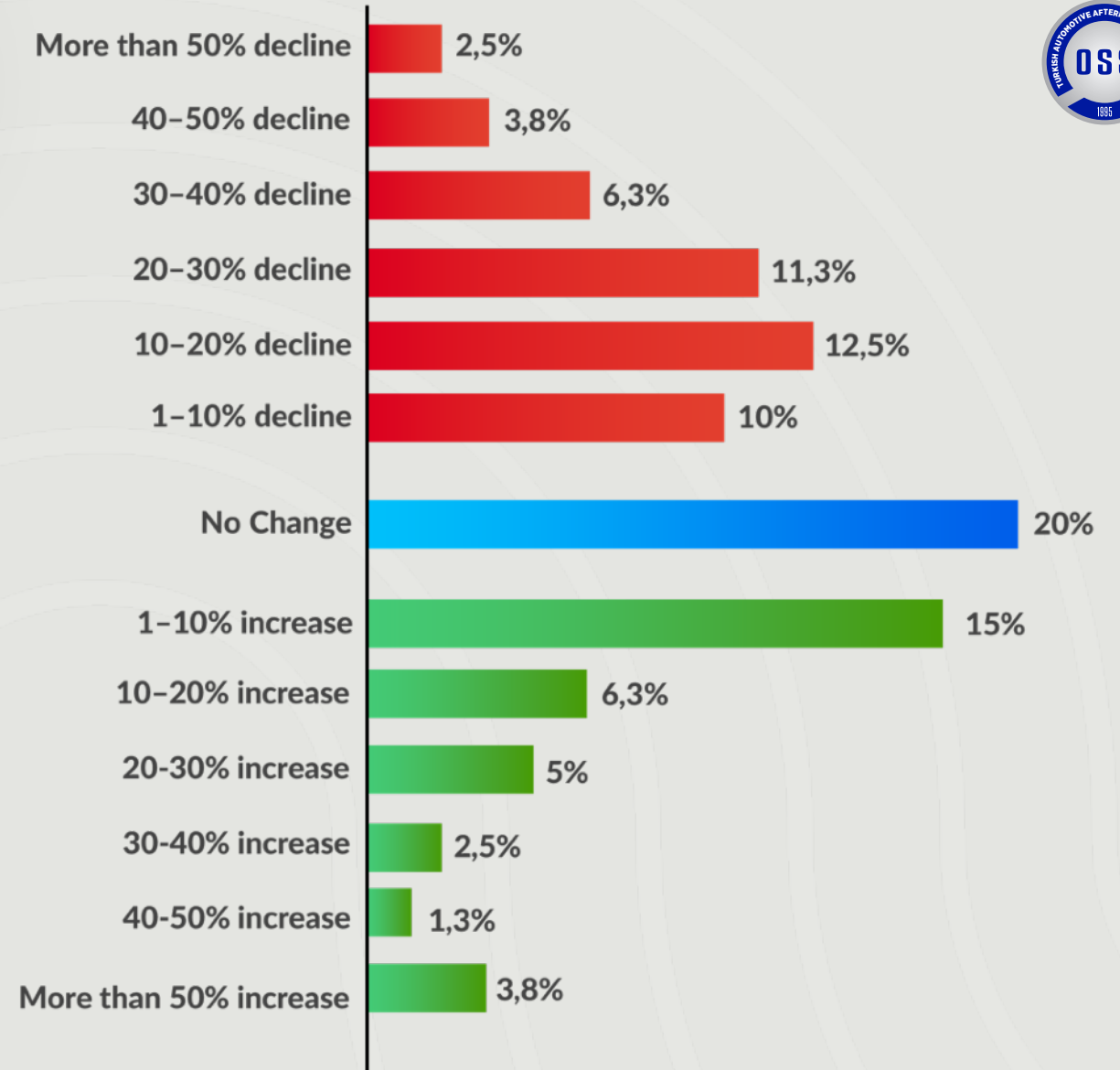
Domestic Sales Q4 2025 vs Q4 2024

In the last quarter of the year, members' domestic sales in USD terms decreased by an average of **3.94%** compared to the same quarter of the previous year.

Distributors' sales increased by **1.71%**, while manufacturers' sales decreased by **9.87%**.



Average: (-) 3.94%
Expectation: (-) 1.58%



Domestic Sales Q4 2025 vs Q4 2024



Average:

Distributor (+): 1.71%

Manufacturer (-): 9.87%

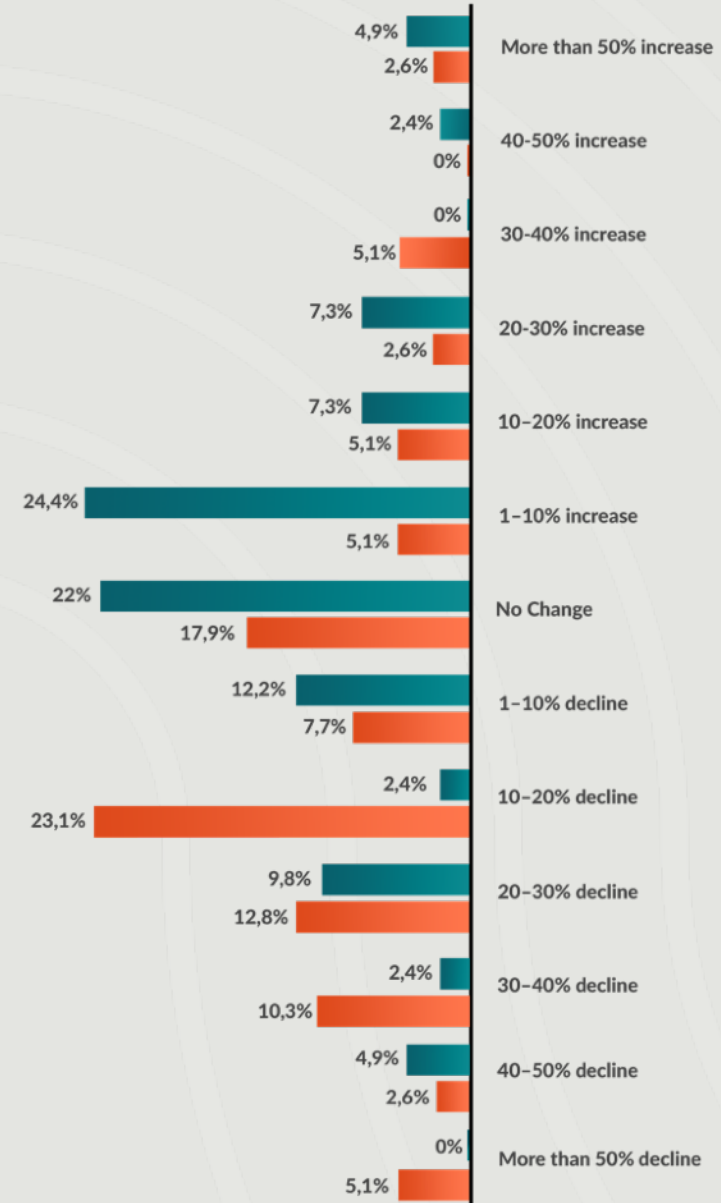


Expectation:

Distributor (+): 0.38%

Manufacturer (-): 5.24%

Distributor Manufacturer



Domestic Sales 2025 vs 2024

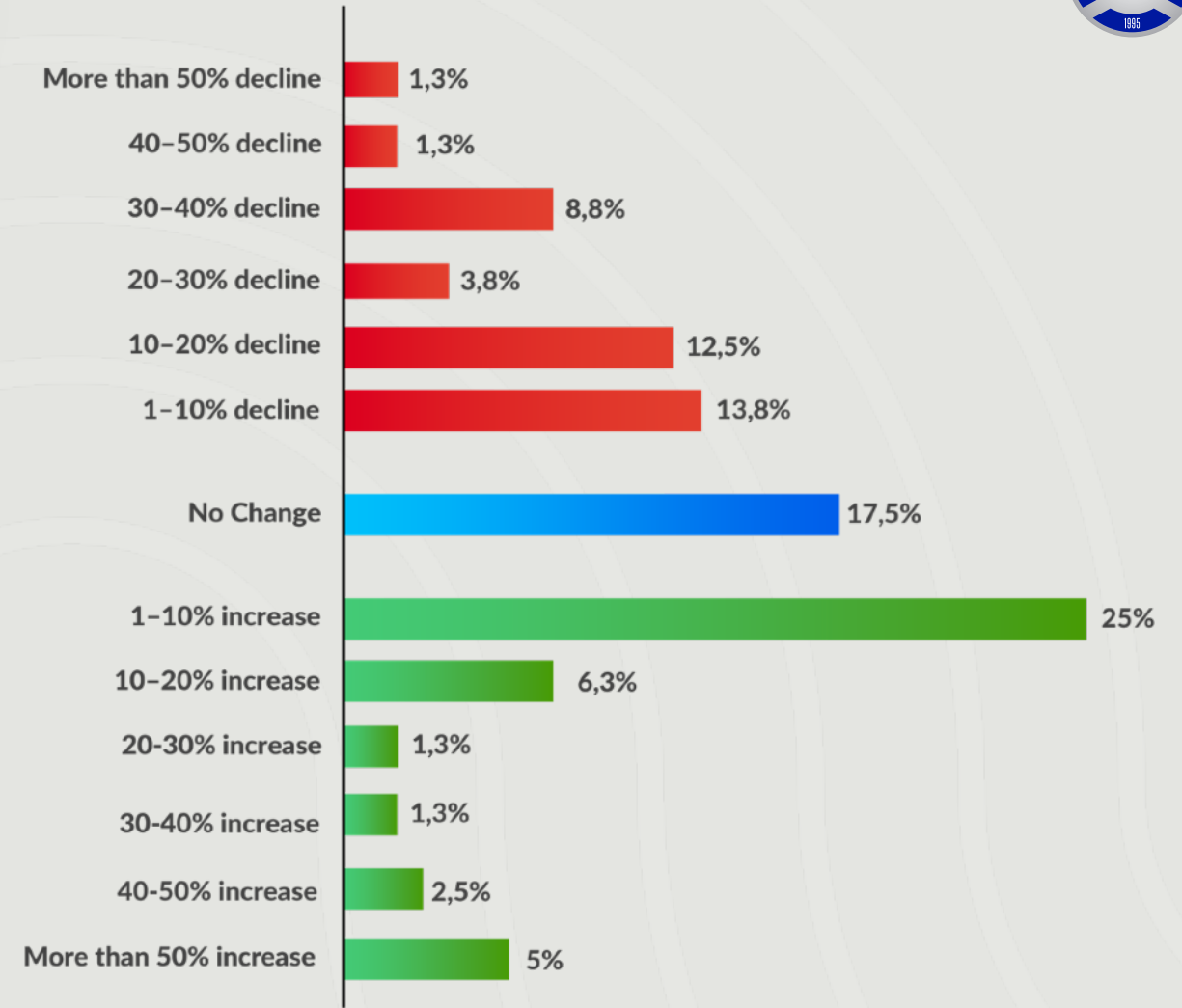


Overall in 2025, members' domestic sales in USD terms decreased by an average of **0.81%** compared to the previous year.

Distributors' sales increased by **2.93%**, while manufacturers' sales decreased by **4.74%**.



Average: (-) 0.81%
Expectation: (+) 9.67%



Domestic Sales 2025 vs 2024



Average:

Distributor (+): 2.93%

Manufacturer (-): 4.74%

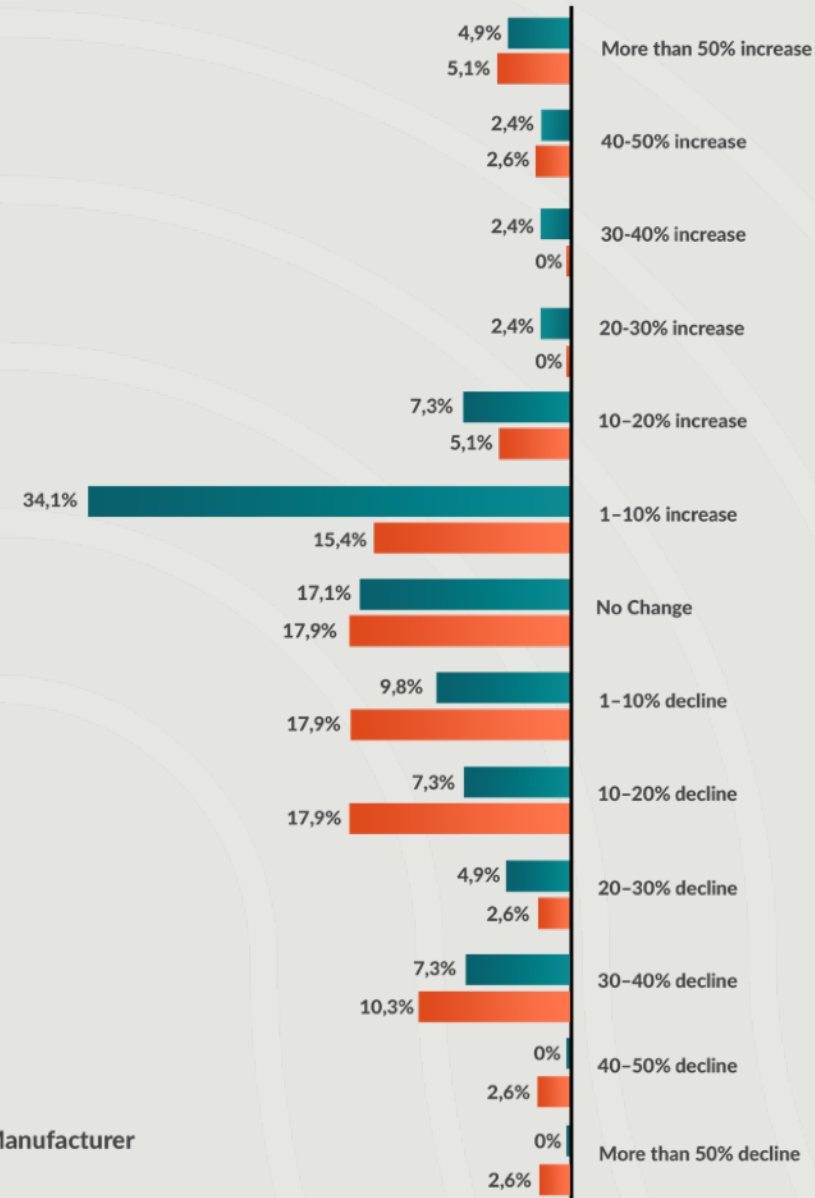


Expectation:

Distributor (+): 10.88%

Manufacturer (+): 8.15%

Distributor Manufacturer



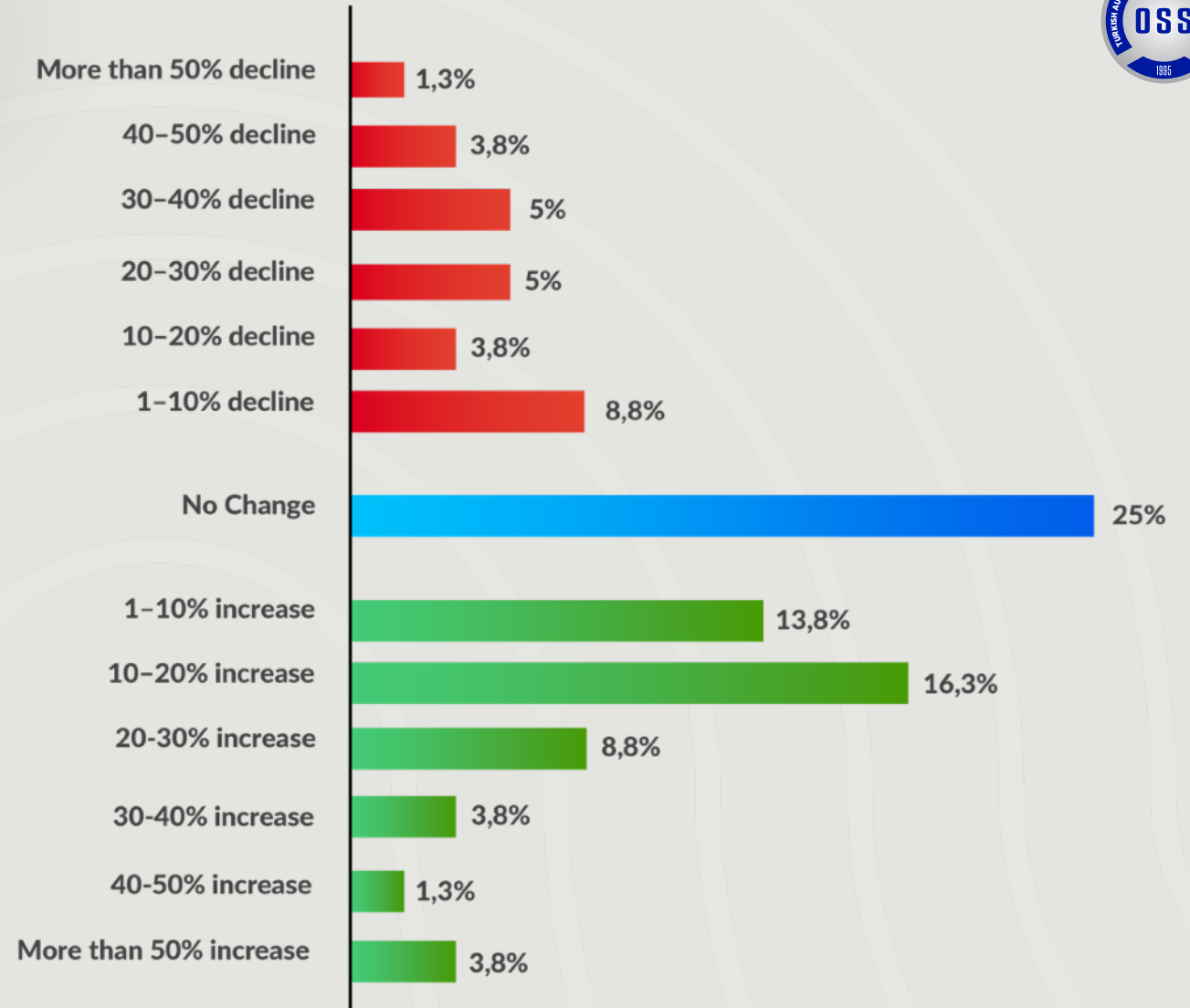
Inventory Change 2025 vs 2024

Overall in 2025, members' inventory levels **increased by an average of 3%** compared to the previous year.

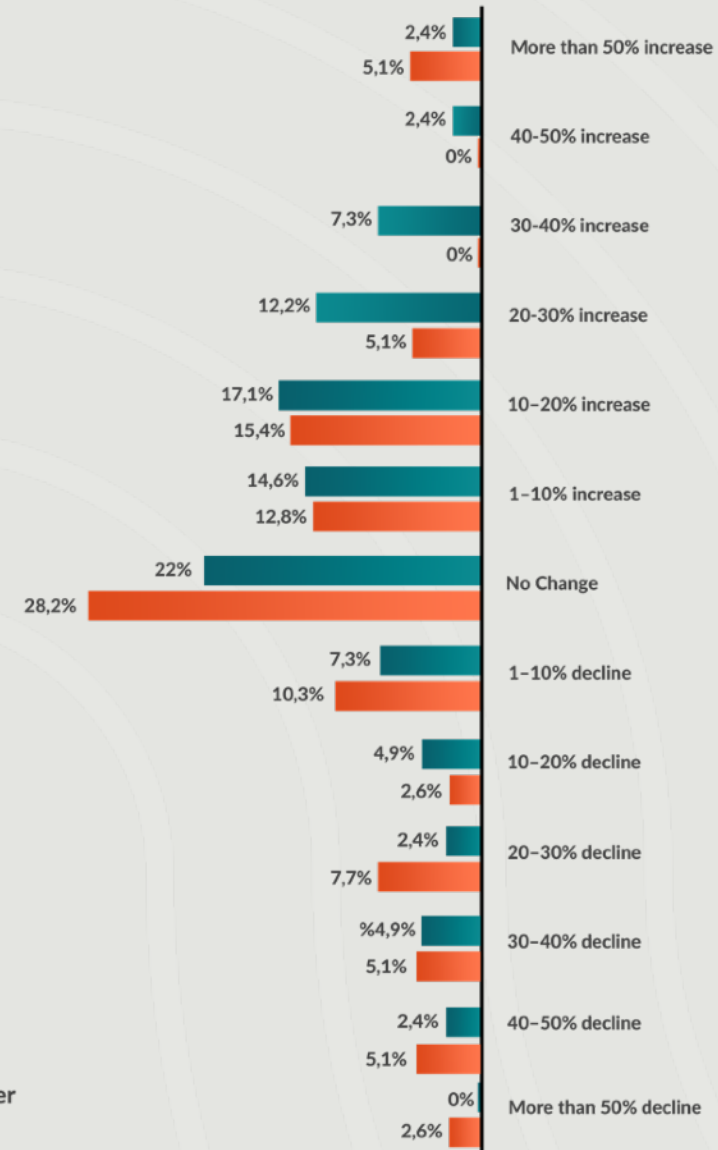
Distributors' inventories **increased by 6.95%**, while manufacturers' inventories **decreased by 1.15%**.



Average: (+) 3,0 %



Inventory Change 2025 vs 2024



■ Distributor ■ Manufacturer

Average:

Distributor (+): 6,95 %

Manufacturer (-): 1,15 %

Expected Change in Domestic Sales in USD Terms in the First Quarter of 2026 Compared to the First Quarter of 2025

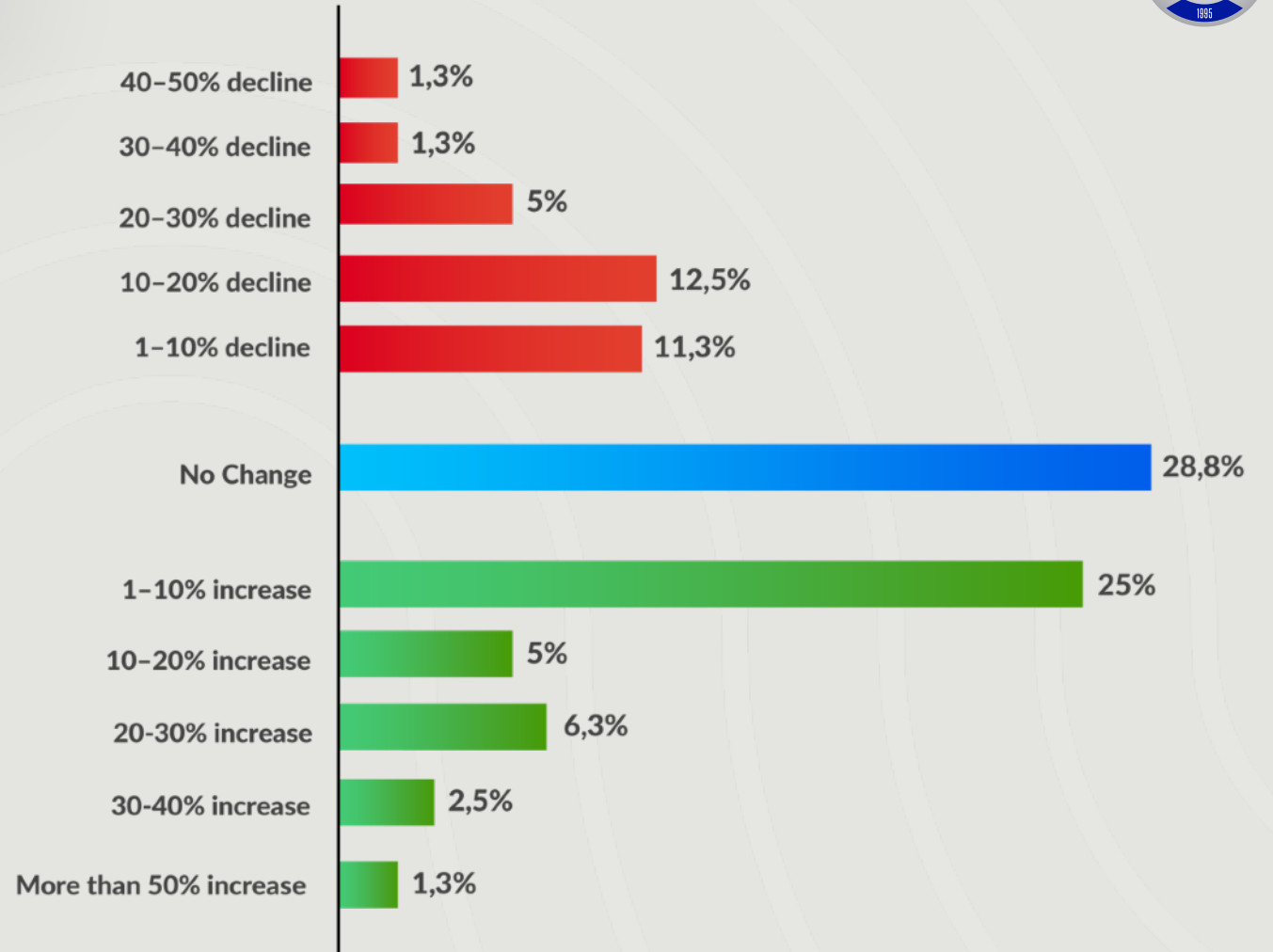


Members expect an average **increase of 0.5%** in domestic sales in USD terms in Q1 2026 compared to Q1 2025.

Distributors expect a **2.93% increase** in sales, while manufacturers expect a **2.05% decrease**.



Average: (+) 0,5 %



Expected Change in Domestic Sales in USD Terms in the First Quarter of 2026 Compared to the First Quarter of 2025

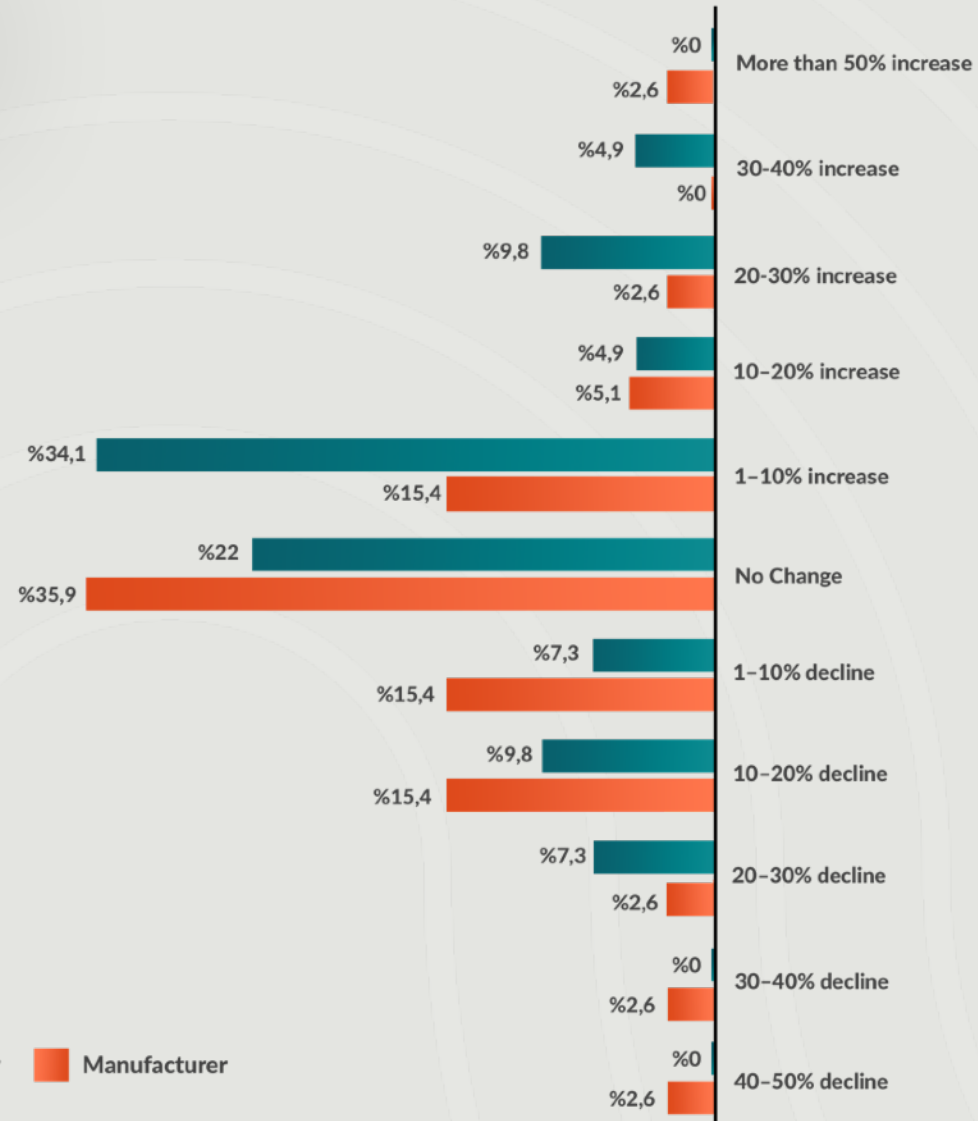


Average:

Distributor (+): 2,93%

Manufacturer (-): 2,05%

■ Distributor ■ Manufacturer



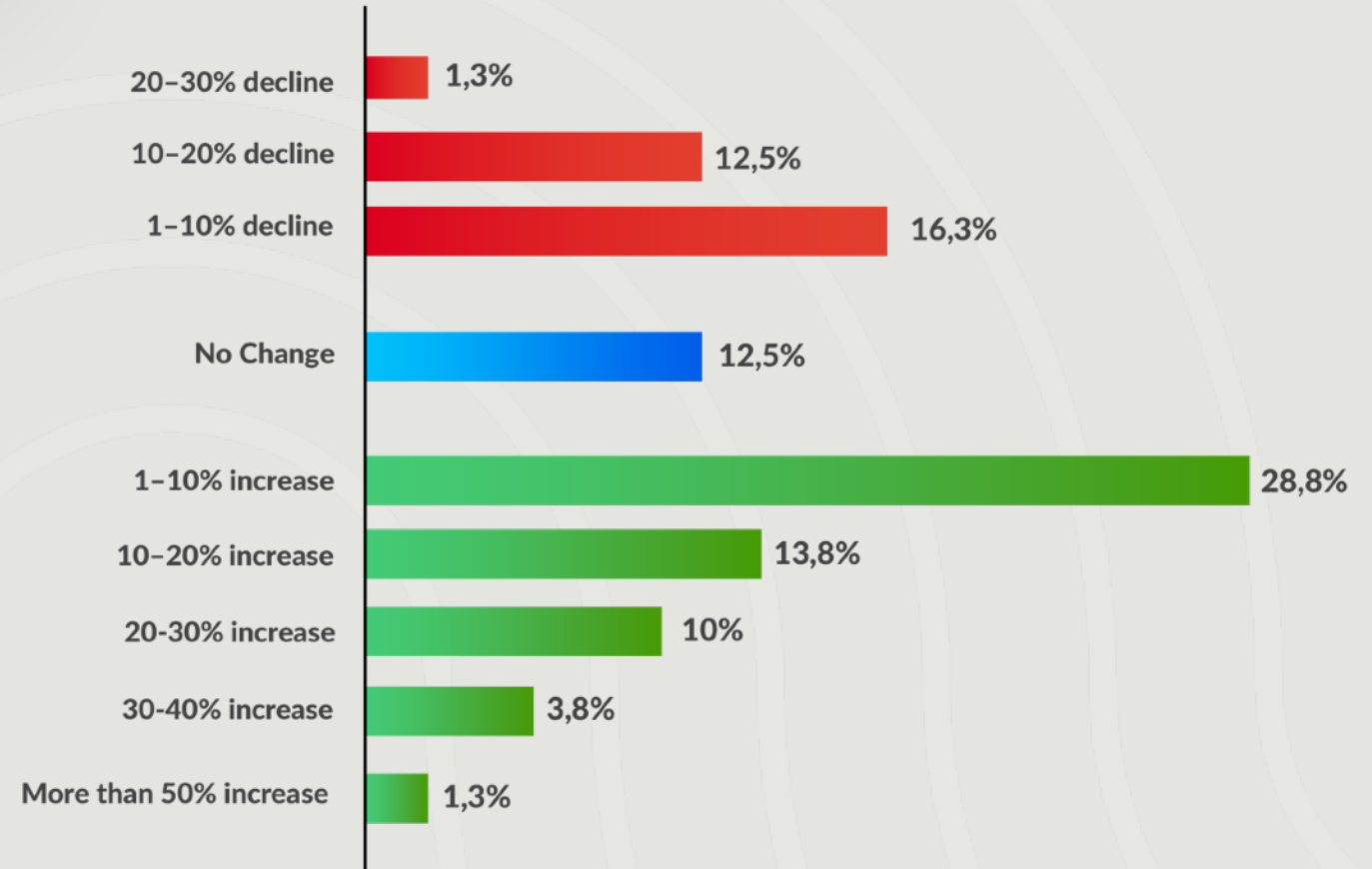
Expected Change in Domestic Sales in USD Terms in 2026 Compared to 2025

Members expect an average **increase of 5.6%** in domestic sales in USD terms in 2026 compared to 2025.

Distributors expect a **7.8% increase**, while manufacturers expect a **2.18% increase**.



Average: (+) 5,06 %



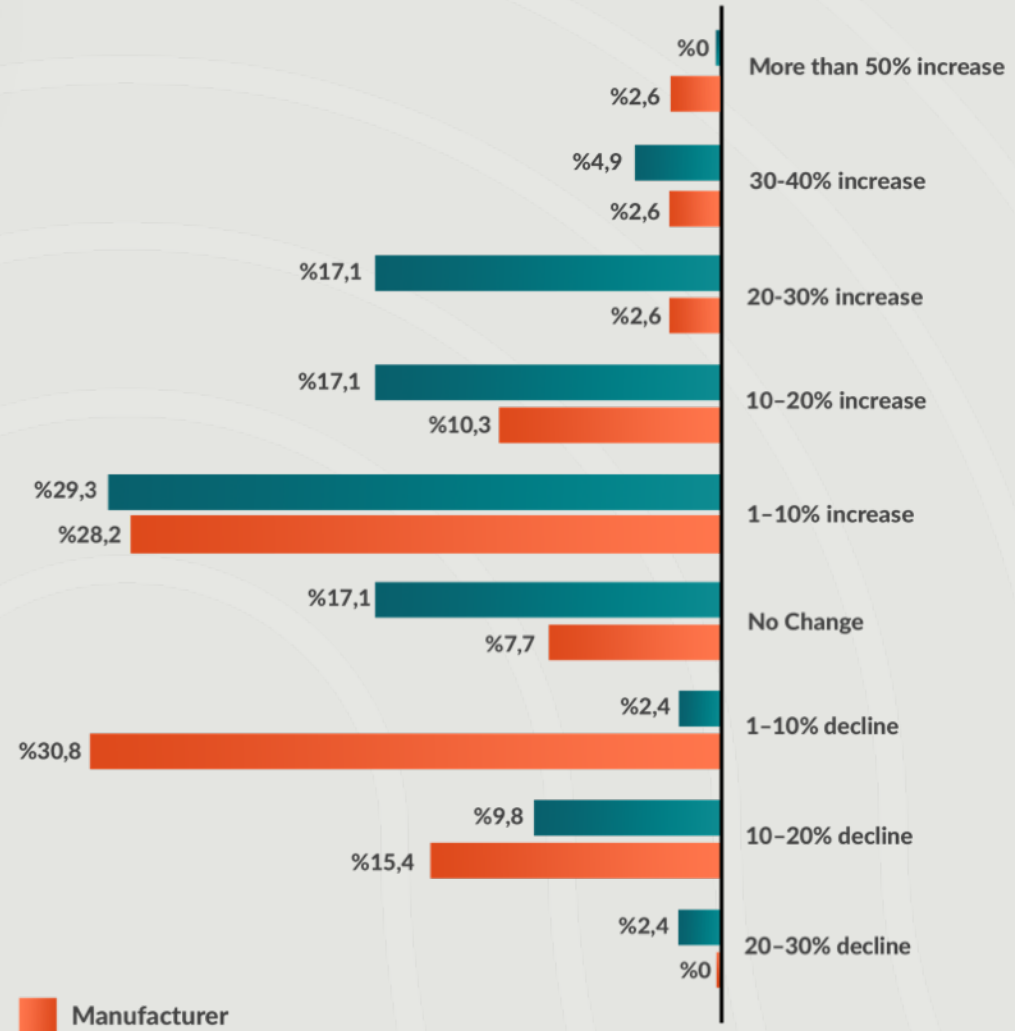
Expected Change in Domestic Sales in USD Terms in 2026 Compared to 2025



Average:

Distributor (+): 7,80%

Manufacturer (+): 2,18%



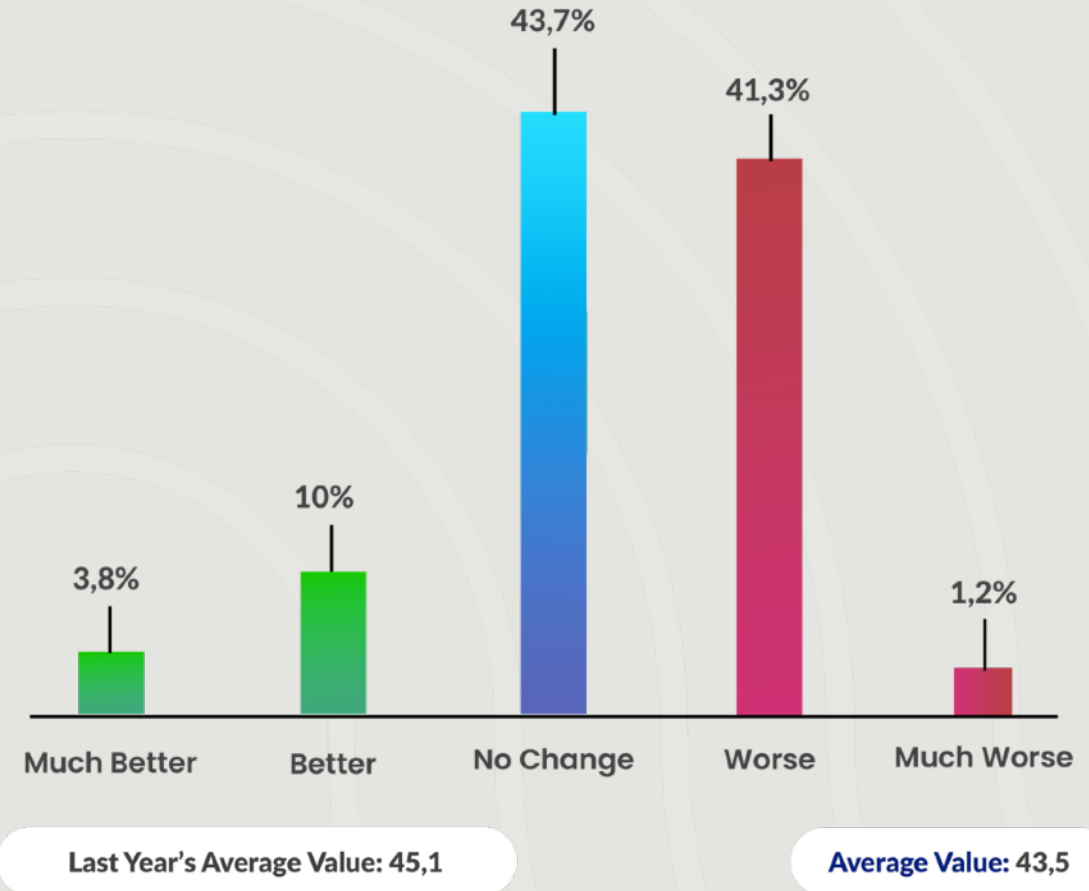
Collection Process Assessment 2025 vs 2024



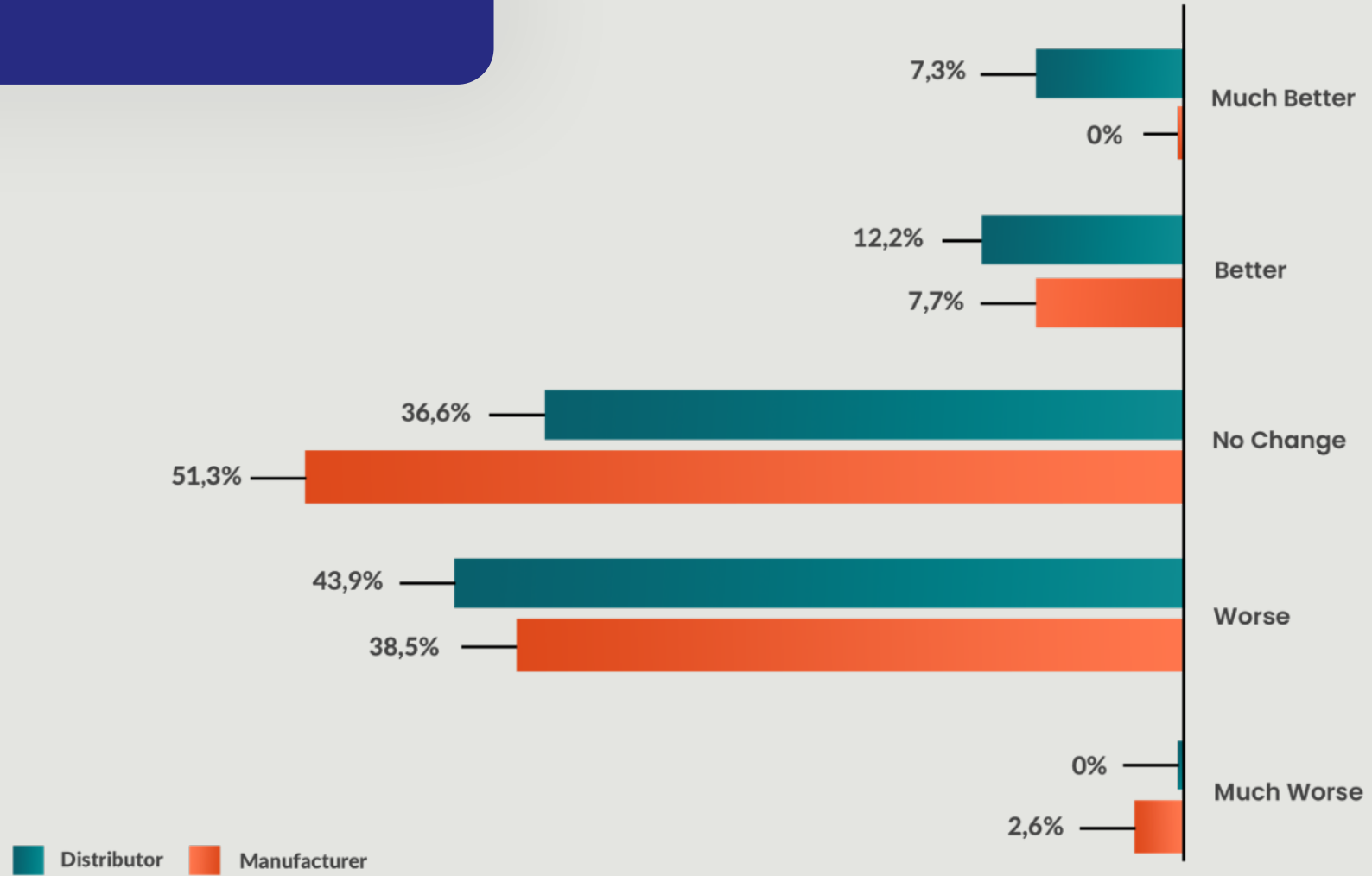
Nearly half of the participating members stated that there was no change in their collection processes in 2025 compared to 2024.

The proportion of members expressing a negative assessment increased compared to the previous year. The deterioration in the collection process continues.

In calculating the average, “Very Good” is accepted as 100 and “Very Bad” as 1, and calculations are made in 25-point intervals. Therefore, values closer to 100 are considered better.



Collection Process Assessment 2025 vs 2024

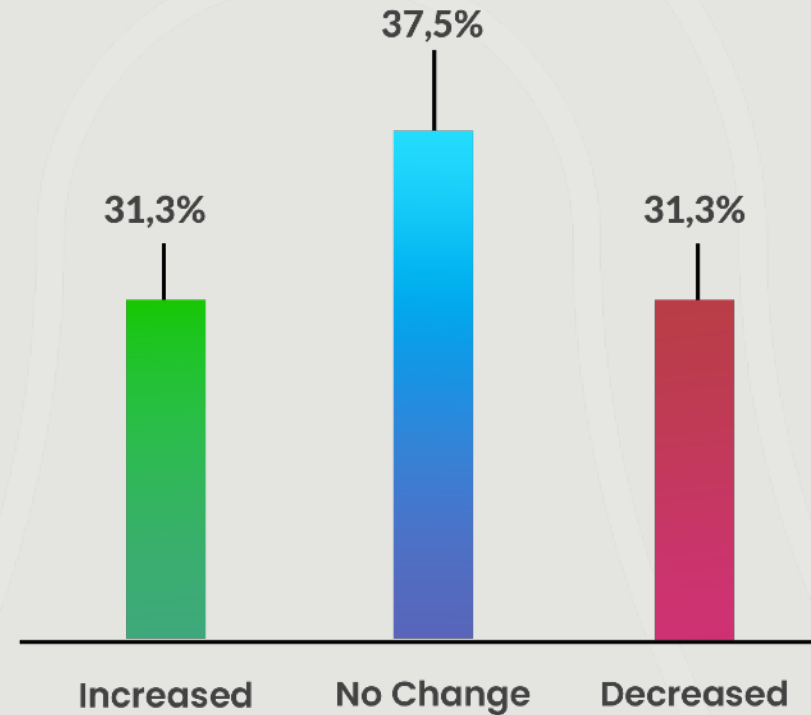


Employment Status 2025 vs 2024

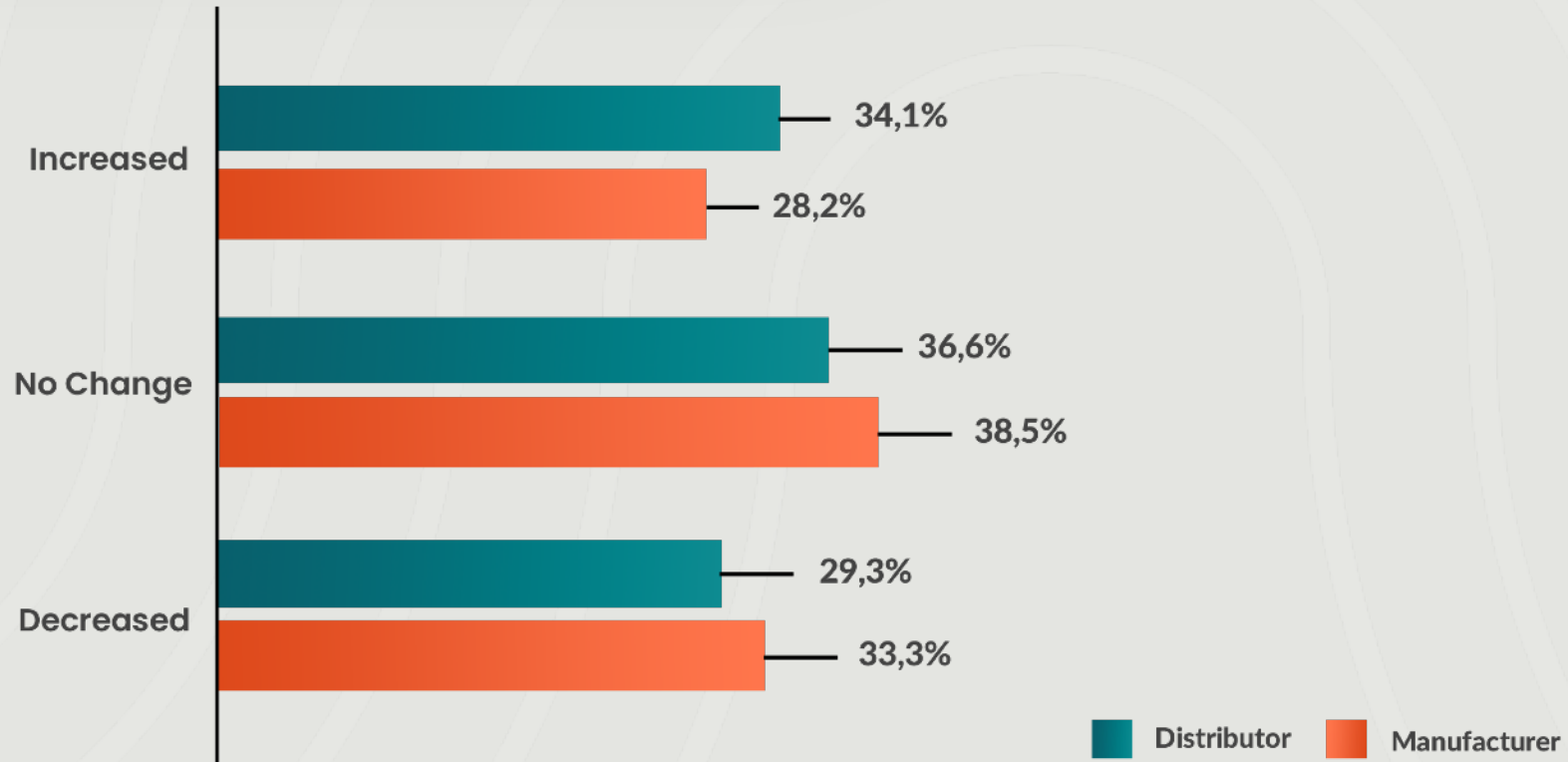


In 2025, total employment among members did not change proportionally compared to 2024.

However, the proportion of members reporting an increase in employment decreased from **42.6% to 31.3%**, while the proportion reporting a decrease increased from **21.3% to 31.3%**.



Employment Status 2025 vs 2024

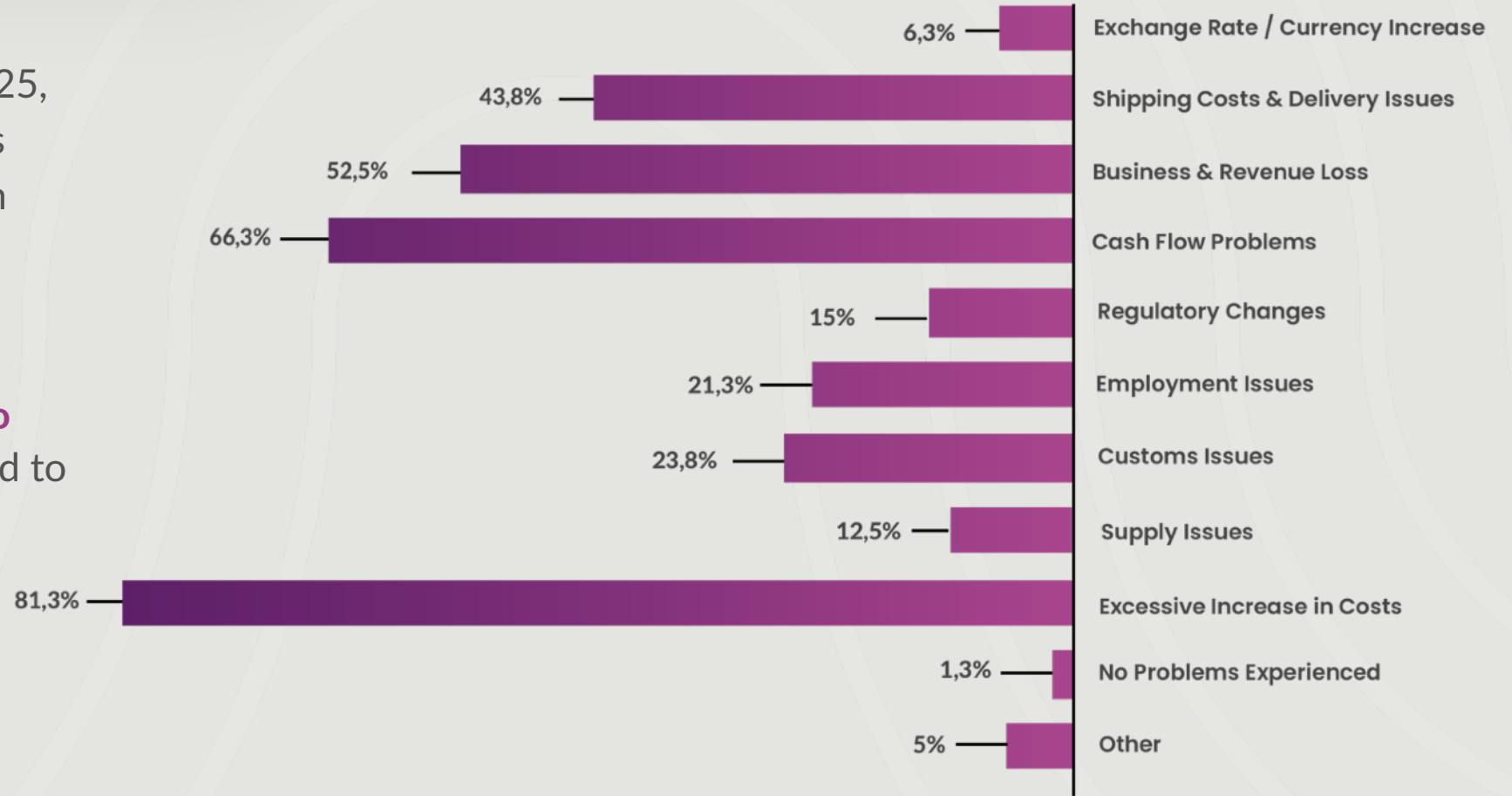


Problems Observed in 2025

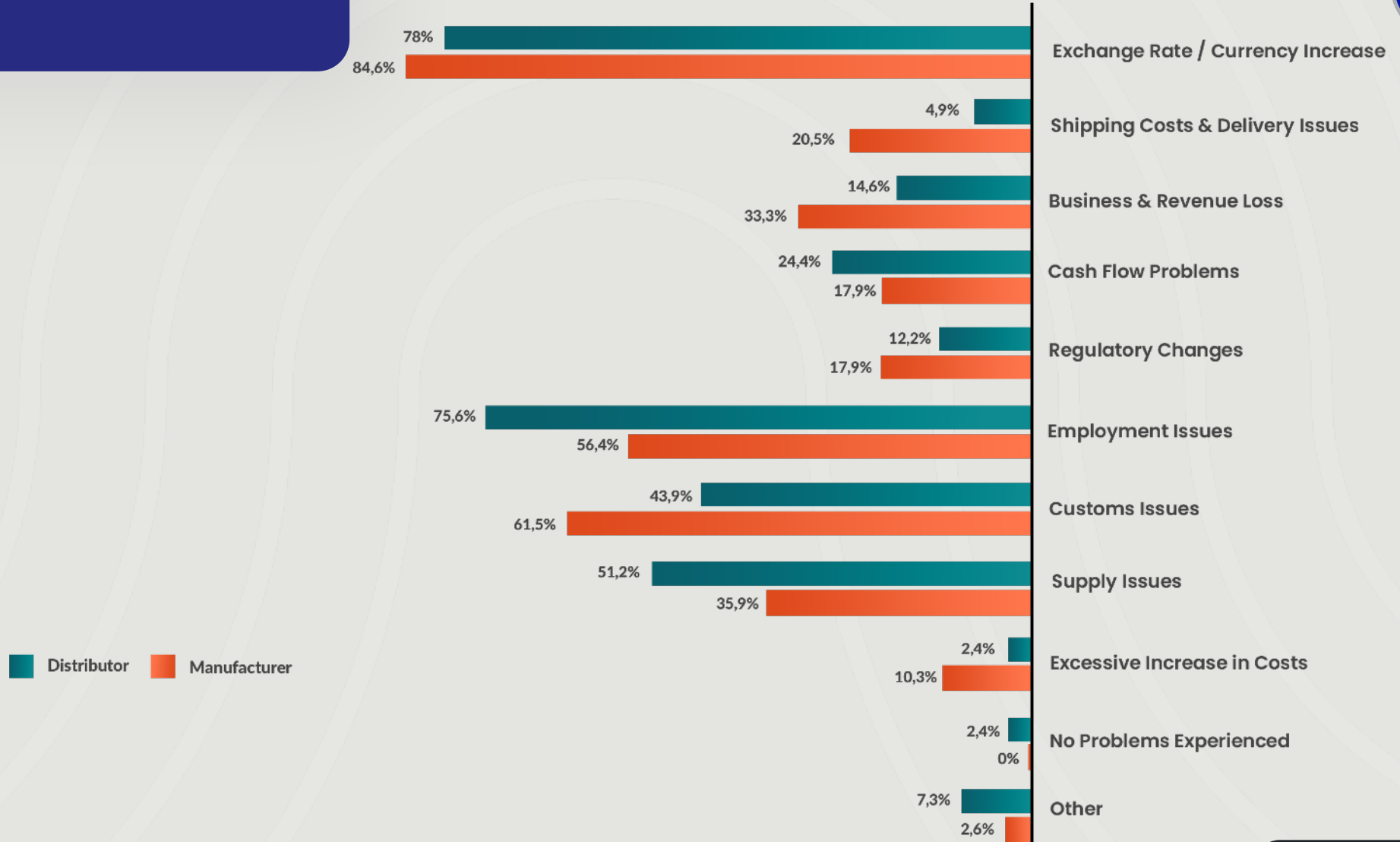


The most commonly observed problem in 2025, as in previous years, was the excessive increase in costs.

Cash flow problems increased from 50.8% to 66.3%, and issues related to business and revenue loss rose from 41% to 52.5%.



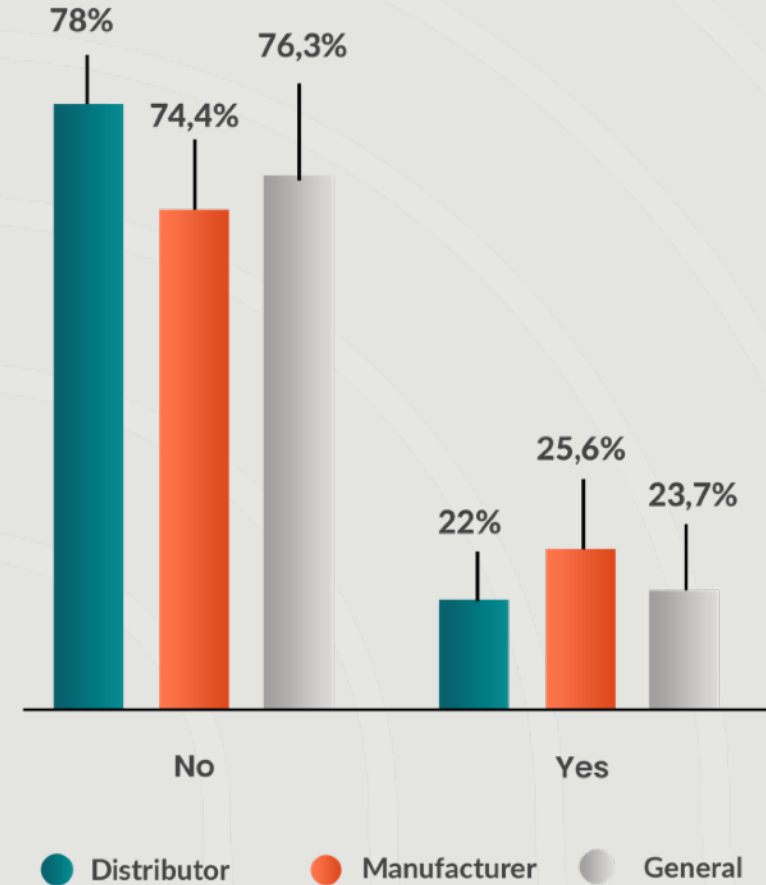
Problems Observed in 2025



Investment Plans (Next 3 Months)

In the first quarter of 2025, three-quarters of members did not have any investment plans.

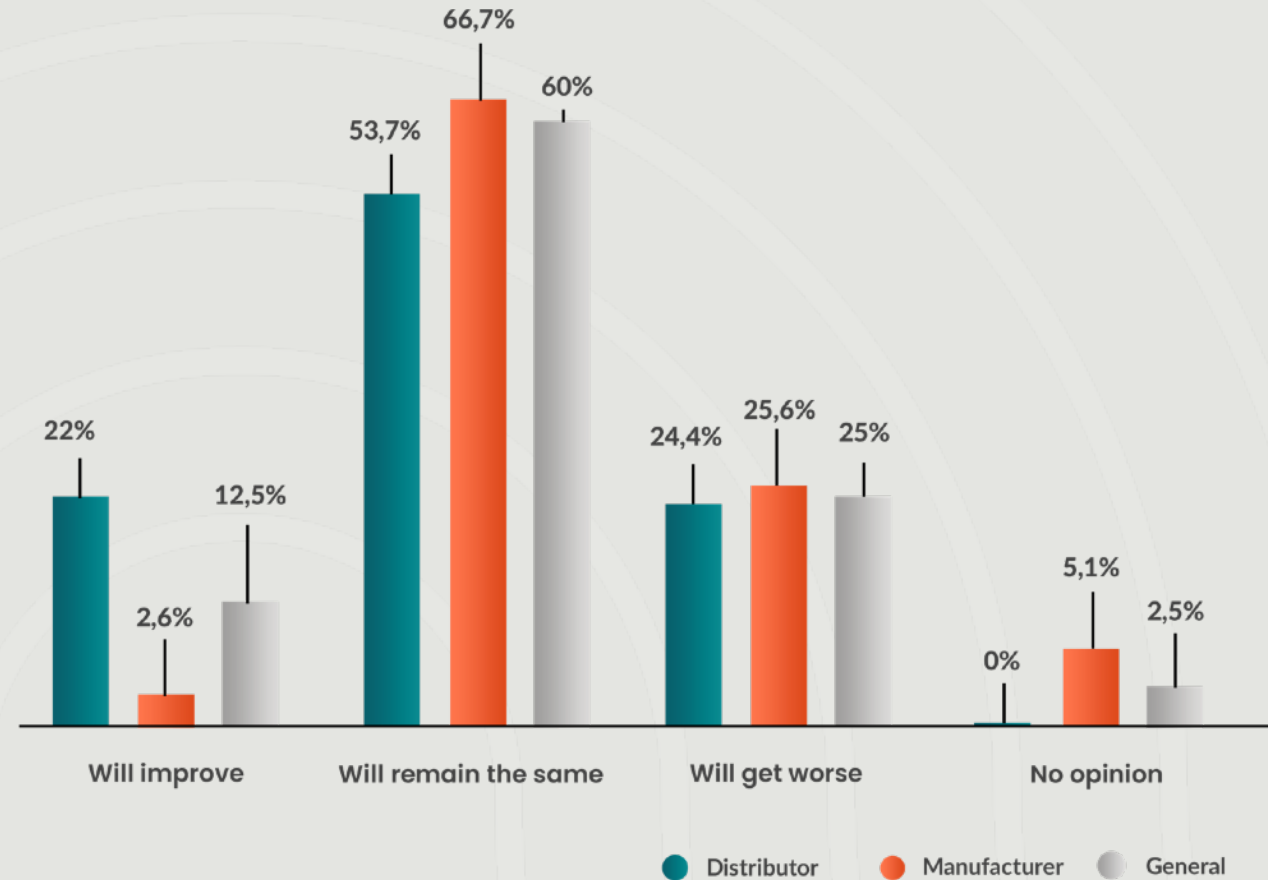
In the previous survey, **33.3%** of manufacturer members planned to invest; in the new survey, this ratio **decreased to 25.6%**. Among distributors, the ratio **increased from 10.3% to 22%**.



Aftermarket Outlook (Next 3 Months)



More than half of the participating members do not expect a positive or negative differentiation in the sector over the next three months. In the previous survey, the proportion of distributor members who expected a more **negative outlook** was 41%; in this survey, it decreased to 24.4%. Among manufacturers, the same ratio decreased from 42.9% to 25.6%.

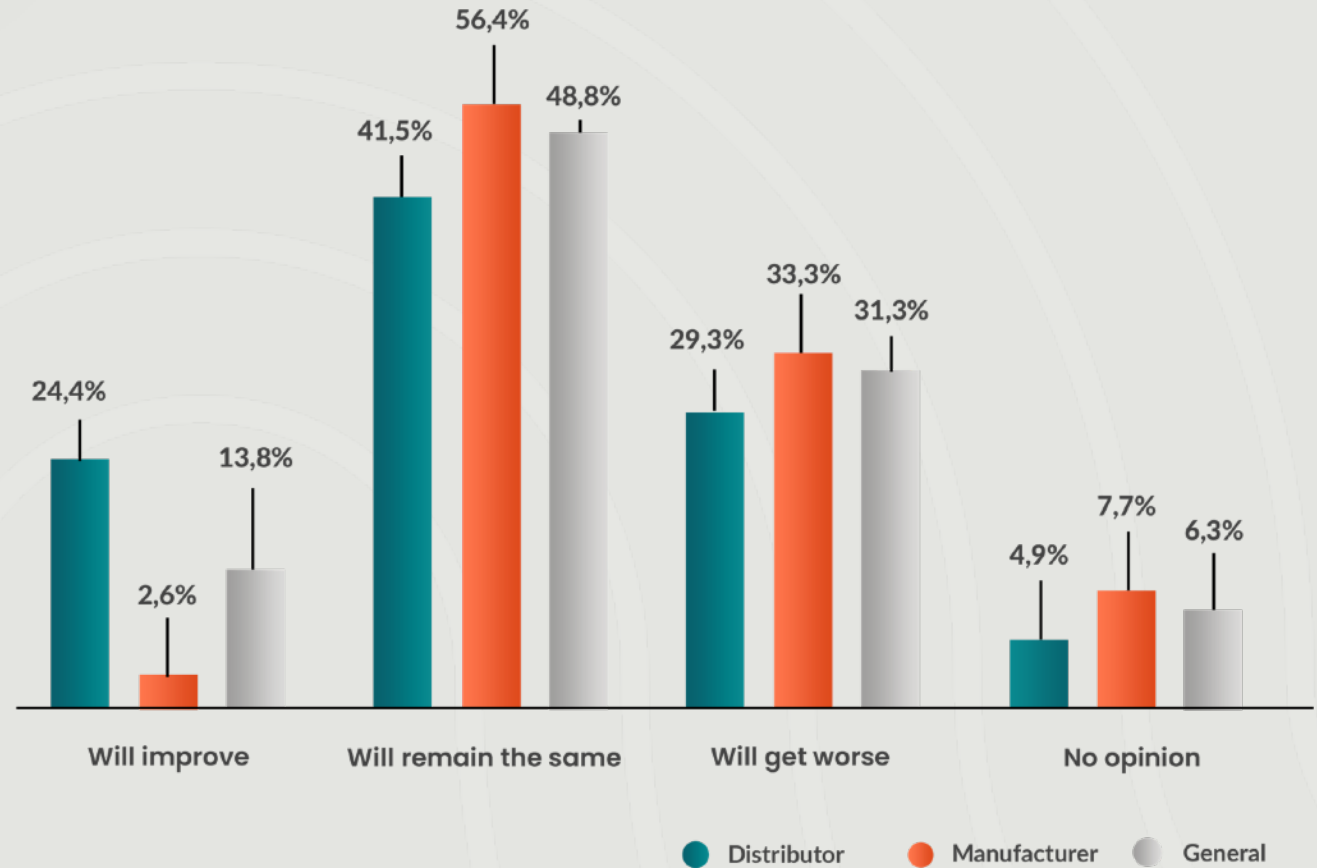


Economic Outlook (Next 3 Months)



Nearly half of the members predict no change in the economic structure over the next three months.

In the previous survey, **53.8%** of distributor members expected a deterioration, while this ratio **decreased to 29.3%**. Among manufacturers, the same ratio **decreased from 47.6% to 31.3%**.



Members' USD Exchange Rate Forecast
End of Q1 2026



Average: 46.53 TRY

Year-End Expectation: 44.96 TRY



Average:
Distributor: 46,73 TRY
Manufacturer: 46,32 TRY



Year-End Expectation Average:
Distributor: 44,58 TRY
Manufacturer: 45,74 TRY

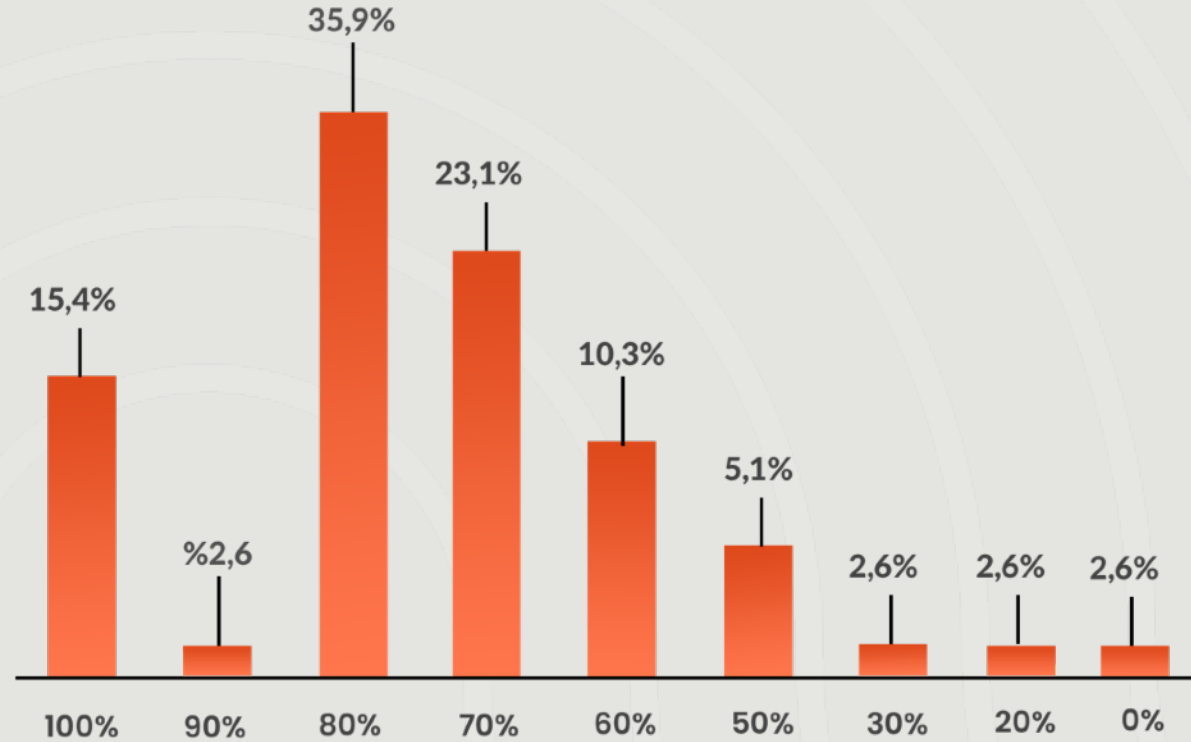
Manufacturer Section

Capacity Utilization Rate of Manufacturing Members in 2025



The average capacity utilization rate of manufacturer members in 2025 was **72.56%**.

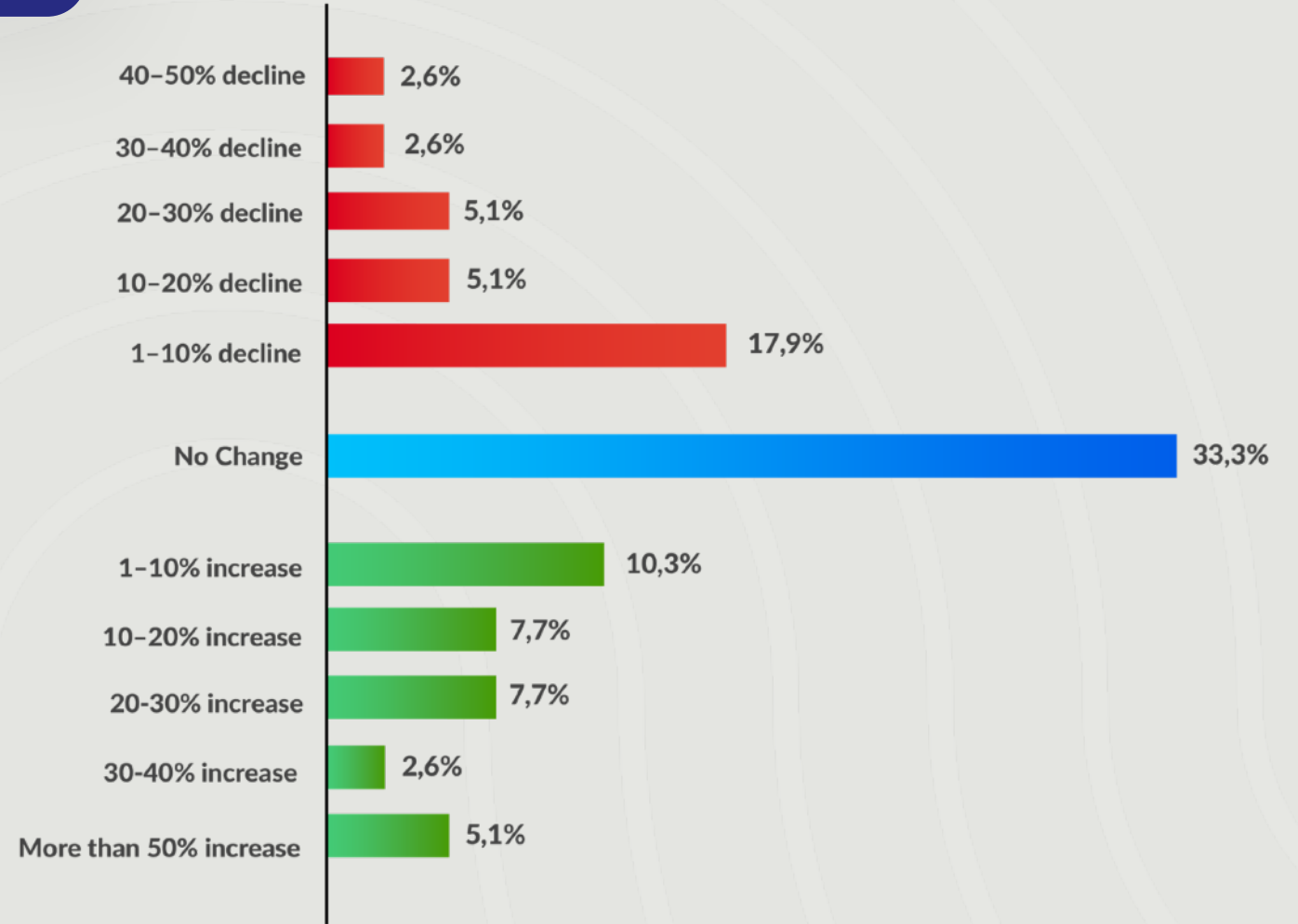
In 2024, the capacity utilization rate was **78.15%**.



Production Change Q4 2025 vs Q4 2024



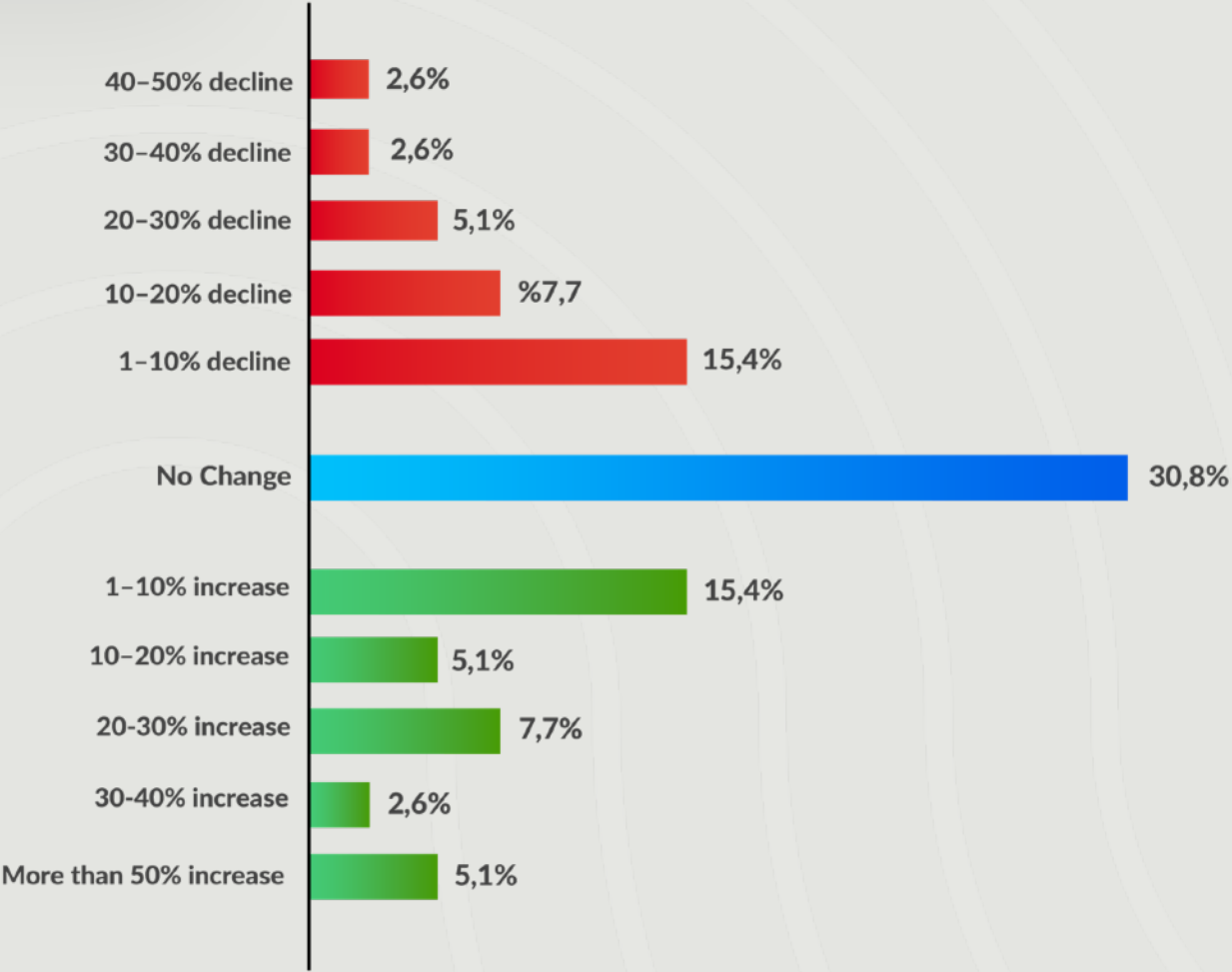
In the last quarter of the year, members' production increased by an average of **2.56%** compared to the last quarter of 2024.



Production Change – 2025 vs 2024



In 2025, members' production increased by an average of **2.18%** compared to 2024.

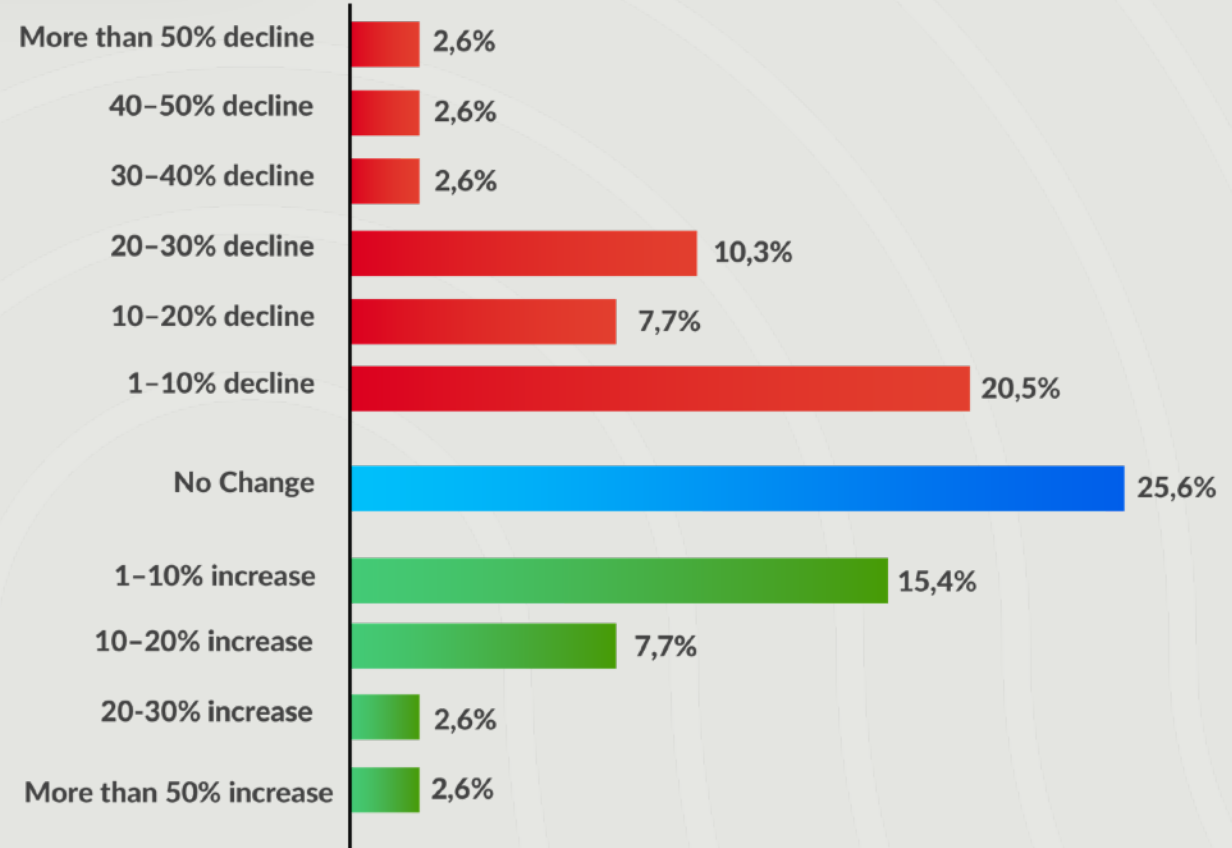


Export Change

Q4 2025 vs Q4 2024



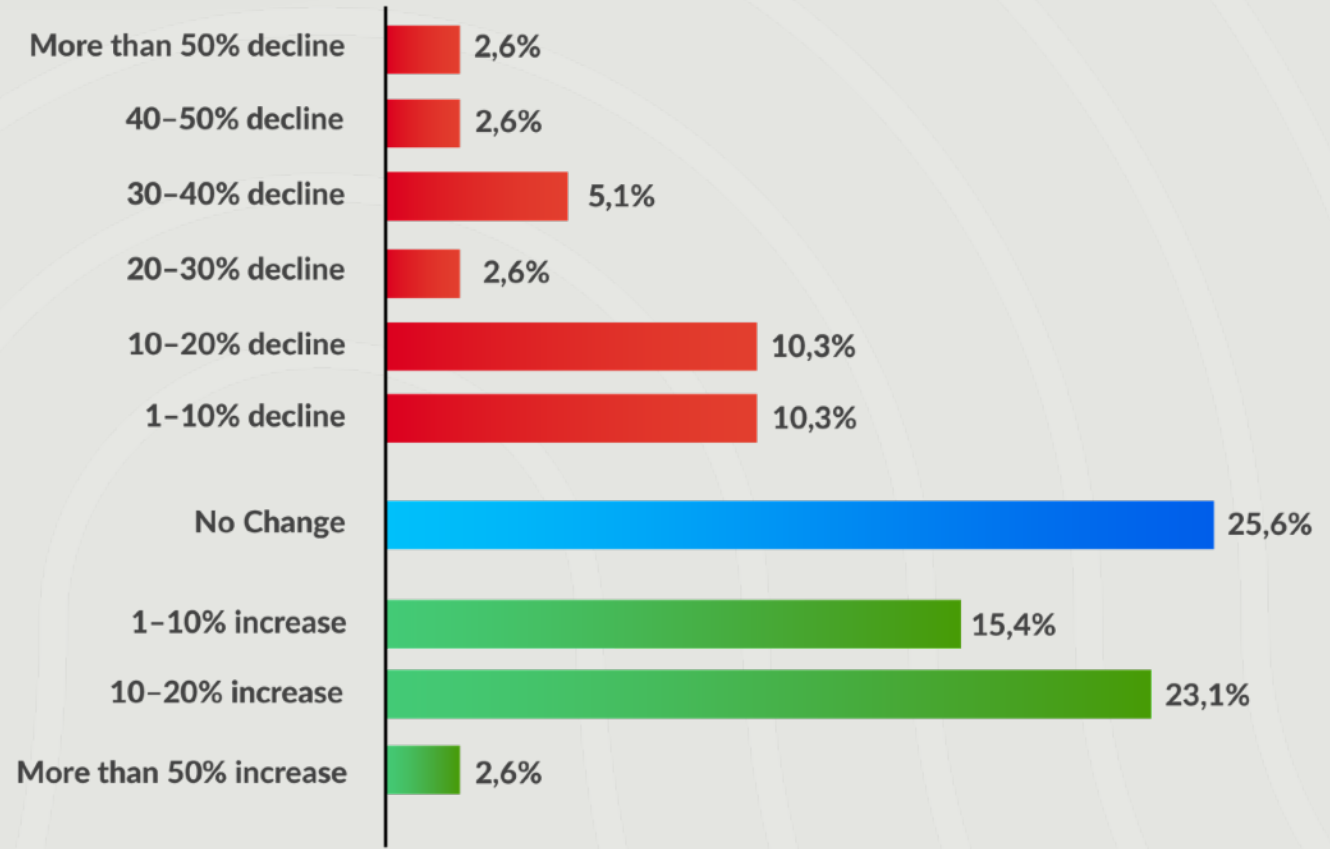
In the last quarter of the year, members' exports in USD terms **decreased by 4.23%** compared to the last quarter of 2024.



Export Change – 2025 vs 2024



In 2025, members' exports in USD terms **decreased by an average of 1.41%** compared to 2024.





Thank You.