

# ANADOLU ISUZU

## CORPORATE OVERVIEW

# COMPANY PROFILE

- **Company Name:** Anadolu Isuzu Otomotiv Sanayi ve Ticaret A.Ş.
- **Chairman:** M. Kamil Eser
- **General Manager:** Y. Tuğrul Arıkan
- **Foundation:** 1965
- **TAA with Isuzu:** 1983
- **SOP:** July 1984
- **Production Capacity:** 13,550 units / single shift
- **Shareholders:**

Anadolu Group	53,57%
Isuzu Motors Limited	16,99%
Itochu Corporation	12,75%
Public Shareholders	16,32%
Others	0,37%

<b>Employee:</b>	<b>White Collar</b>	<b>287</b>
	<b>Blue Collar</b>	<b>622</b>
	<b>Total</b>	<b>909</b>

<b>Turnover (2015):</b>	<b>935 mio TL</b>
<b>Export (2014):</b>	<b>30 mio Euro</b>

# COMPANY HIGHLIGHTS

- Isuzu Motors celebrates 100th anniversary in 2016
- Anadolu Isuzu produced 110.000 trucks, 40.000 buses and 3.000 pick-ups since 1984 (32 years of production experience)
- The company exported 15.000 buses to more than 60 countries since 1994 (22 years of export experience)
- Midibus export market leader for 11 consecutive years (2004-2014)
- 26 dealers and 130 after sales centers in Turkey
- Distributorship and after sales network covering 26 countries

# AIOS PRODUCTION FACILITIES



Total Area: 300.000 m<sup>2</sup> (83.000 m<sup>2</sup> covered )

Production Capacity: 13.550 units p.a. (Single shift)

ISO 9001 Quality and ISO 14001 Environmental Management Certification

# PRODUCT RANGE





# BUS & COACH



**CLASSIC**



**VISIGO / INTERURBAN (9,5m)**



**CITIPOST (12m)**



**ECOBUS**



**TURQUOISE (7,7m)**



**CITIBUS (9,5m)**



**OASIS**



**NOVO / NOVO ULTRA (7,3m)**



**NOVOCITI (7,5m)**

# TRUCK & LIGHT TRUCK



**N-WIDE**



**N-WIDE LONG**



**NLR**



**NLR LONG**



**NPR 8**



**NPR 8 LONG**



**NPR 10**



**NPR 10 LONG**



**NPR 10 XLONG**



**NPR 3D**



**TORA**



**TORA LONG**

# PICKUP

4X2



**DMAX SC**



**DMAX TR**



**DMAX LIMITED**

4X4



**DMAX TR**



**DMAX LIMITED**



**DMAX V-CROSS**



# MARKET PERFORMANCE



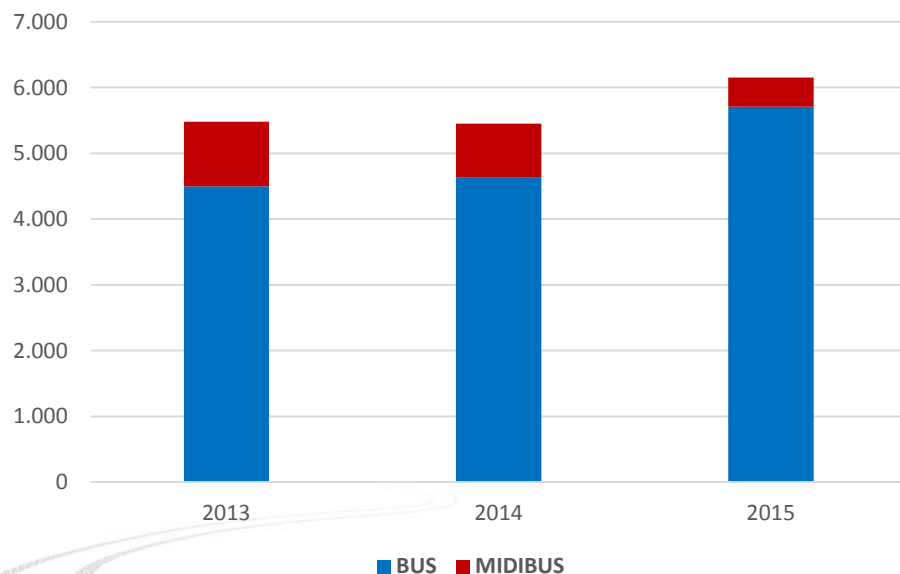
# ISUZU SALES PERFORMANCE (2008-2015)

	2008	2009	2010	2011	2012	2013	2014	2015
<b>PRODUCTION</b>	10,008	1,817	3,292	4,324	4,673	4,907	8,449	11,162
<b>TOTAL SALES</b>	11,170	4,986	6,213	7,026	7,024	8,139	8,912	9,945
<b>DOMESTIC SALES</b>	10,138	4,420	5,719	6,597	6,081	7,260	8,164	9,653
<b>EXPORT SALES</b>	1,032	566	494	429	943	879	748	292

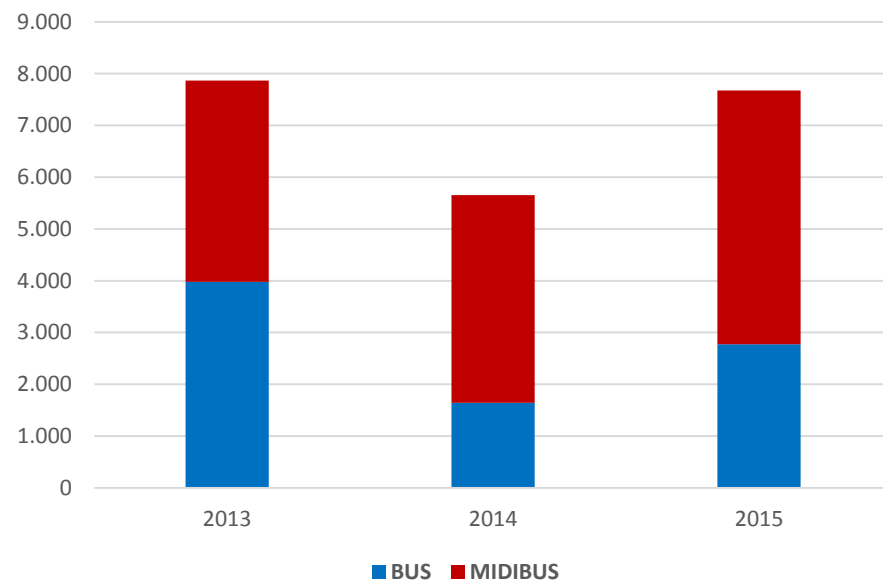
# TURKISH BUS & MIDIBUS SALES

	DOMESTIC SALES			EXPORT SALES		
	2013	2014	2015	2013	2014	2015
<b>BUS</b>	3.977	1.641	2.776	4.498	4.629	5.708
<b>MIDIBUS</b>	3.892	4.012	4.897	985	824	447
<b>TOTAL</b>	<b>7.869</b>	<b>5.653</b>	<b>7.673</b>	<b>5.483</b>	<b>5.453</b>	<b>6.155</b>

EXPORT SALES



DOMESTIC SALES



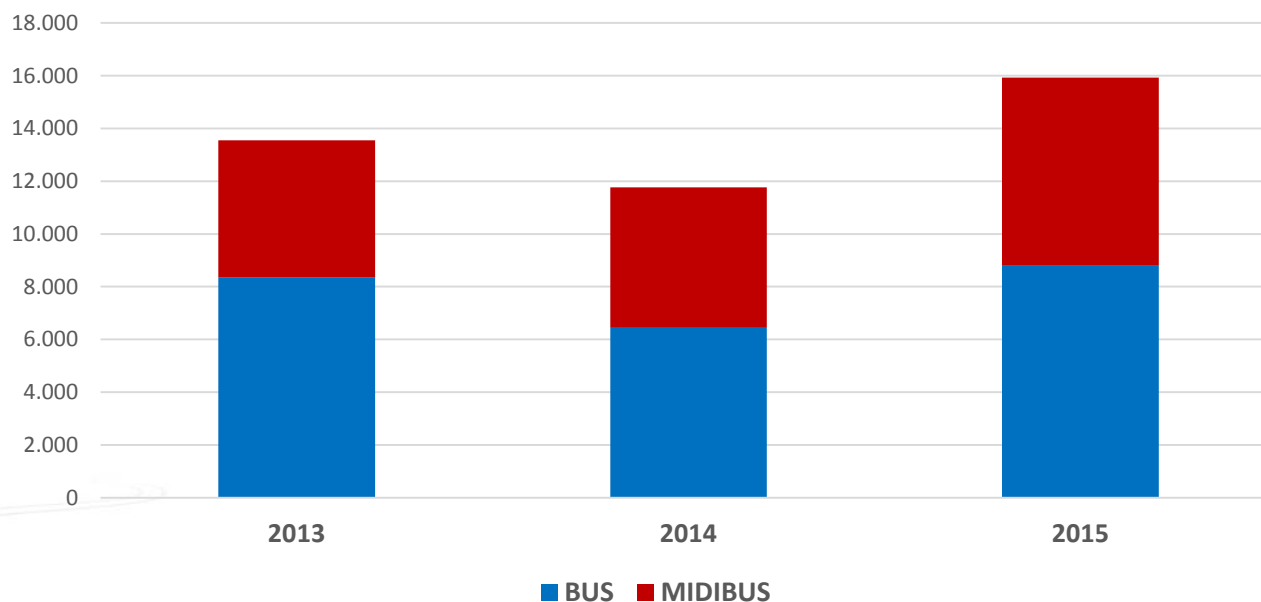
Source: TÜİK and OSD

# TURKISH BUS & MIDIBUS PRODUCTION

	PRODUCTION		
	2013	2014	2015
BUS	8.345	6.442	8.789
MIDIBUS	5.197	5.324	7.131
TOTAL	<b>13.542</b>	<b>11.766</b>	<b>15.920</b>

**BUS & COACH  
MANUFACTURING  
CENTER OF EUROPE**

PRODUCTION

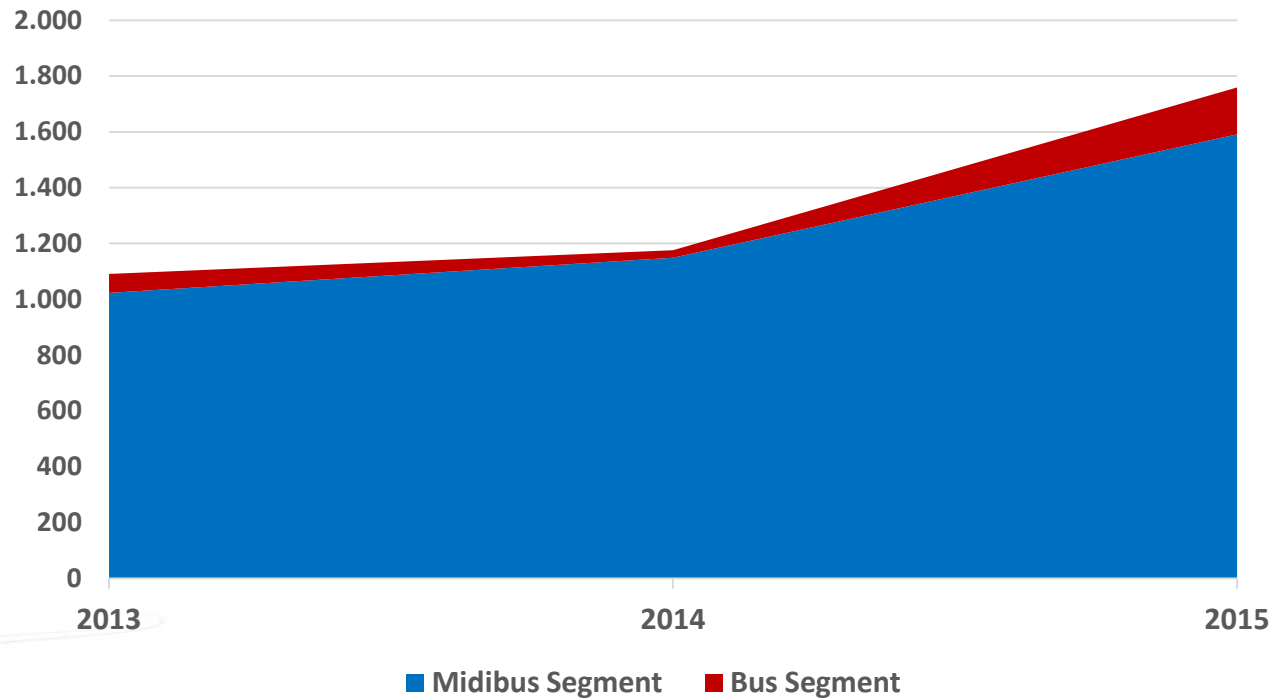


Source: OSD



# ISUZU BUS SALES IN TURKISH MARKET

SEGMENTS	2013	2014	2015
Midibus Segment	1.023	1.149	1.591
Bus Segment	68	27	168



# FACTORS TO AFFECT TURKISH BUS MARKET POTENTIAL

## **POPULATION WILL REACH 90 MILLION IN 2030**

More buses will be needed in a more crowded country

## **AVERAGE AGE OF TURKISH BUS FLEET IS 11 YEARS**

Older fleets constitute higher potential for new sales

## **TURKEY WILL BE AMONG TOP 15 ECONOMIES BY 2030**

Purchasing power will be higher in Turkey

## **HIGHER EMISSION AND SAFETY REGULATIONS ARE ON THE WAY**

New requirements will spur new vehicles sales

## **TURKEY IS AMONG TOP 5 IN WORLD TOURISM RANKING**

The higher a country has tourism activity, the higher the potential will be for coach sales

## **TURKEY IS AN IDEAL REGIONAL HUB FOR BUS MANUFACTURING**

A high export potential in MENA, Sub-saharan Africa and CIS

# TRENDS THAT WILL SHAPE FUTURE OF BUSES

## FUTURE TRENDS

Larger municipalities, More crowded cities

Digitalized and demotorized youth

Increasing number of elders and handicapped people in social life

Scarcity of resources

Stricter regulations to protection the environment

Stricter rules for safety on road

Stronger local authorities and smarter cities

## WILL LEAD TO

Higher demand for public transportation

More digitalized and comfortable journeys

Vehicles with higher accessibility

More efficient engines powered by greener energy resources

Improved safety requirements & technology

Autonomous driving

Connected and well-monitored vehicles

# R&D CAPABILITIES





# R&D CAPABILITIES



- More than 100 engineers
- 94 projects since 1987
- 50 patent applications and more than 90 design registration
- New R&D Center
- Increased test and validation capabilities with new center

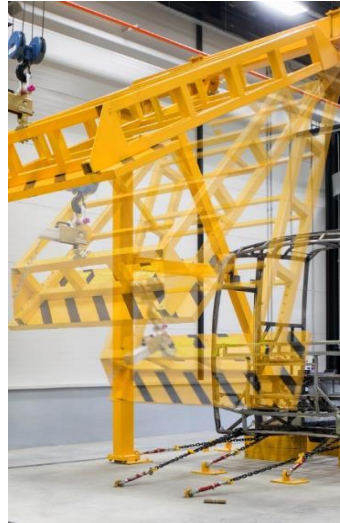
# NEW R&D FACILITIES



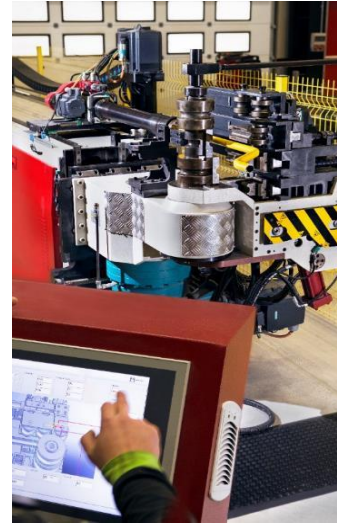
**Design Office**



**R&D Office**



**Test Center**



**Prototype Workshop**



**Special Projects  
Workshop**



# CITIPOINT: THE MOST COMFORTABLE & ERGONOMIC BUS OF EUROPE

ANADOLU ISUZU OTOMOTIV  
SANAYI VE TICARET A.S.

Isuzu Citiport



A grayscale map of Europe serves as the background. It features numerous bus icons scattered across the continent. Three prominent, thick, curved arrows originate from the left side of the map and point towards the right, suggesting travel routes or a journey across the continent. The text is centered over the map.

**Thank you**  
**Teşekkür ederiz**  
**ありがとうございました**