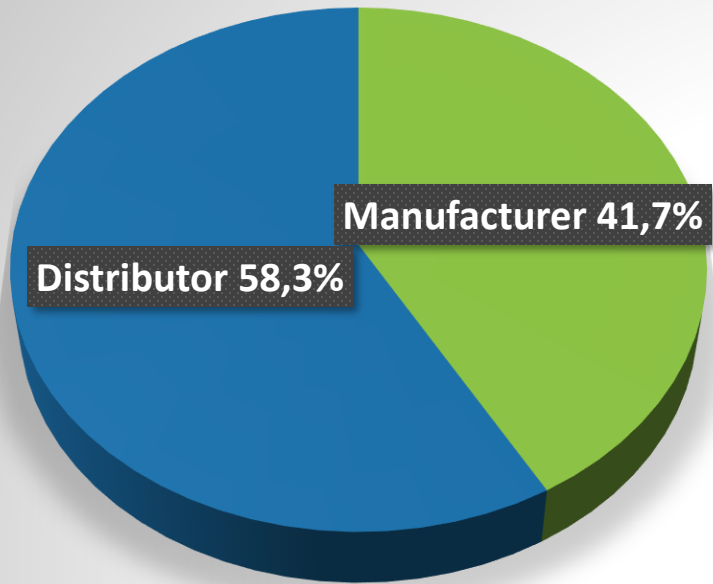




2nd Survey results on the 'Effects of the Coronavirus Crisis on the Automotive Aftermarket'

Survey results are based on the responses, dated 13-15 April, 2020

2. Distribution of the survey participating members

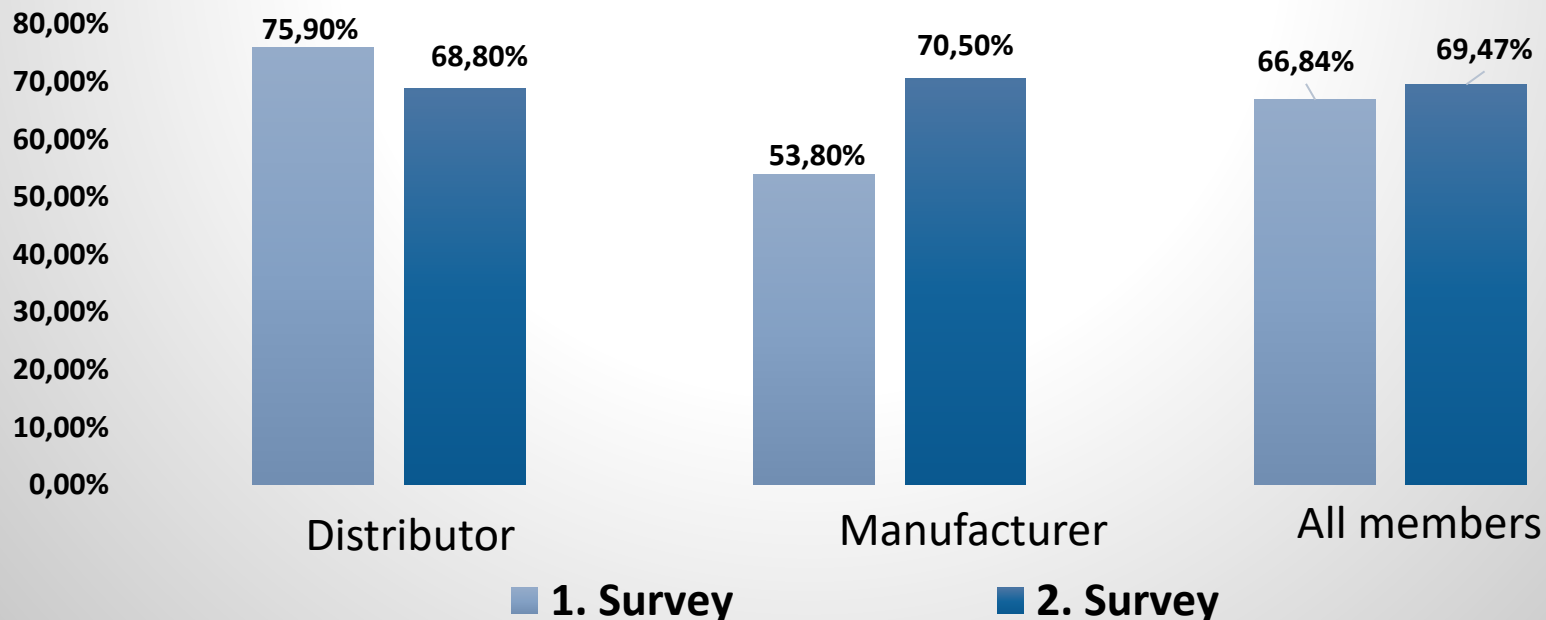


A total of **132** members, **77** of whom were distributors and **55** were manufacturers, participated in our second survey, which was conducted between 13-15 April.

The participation rate of our member manufacturers is **70.5 %**
 The participation rate of our distributor members is **68.8 %**.

1. **Survey** : Week of 30 March (week 14)
2. **Anket** : Week of 13 April (week 16)

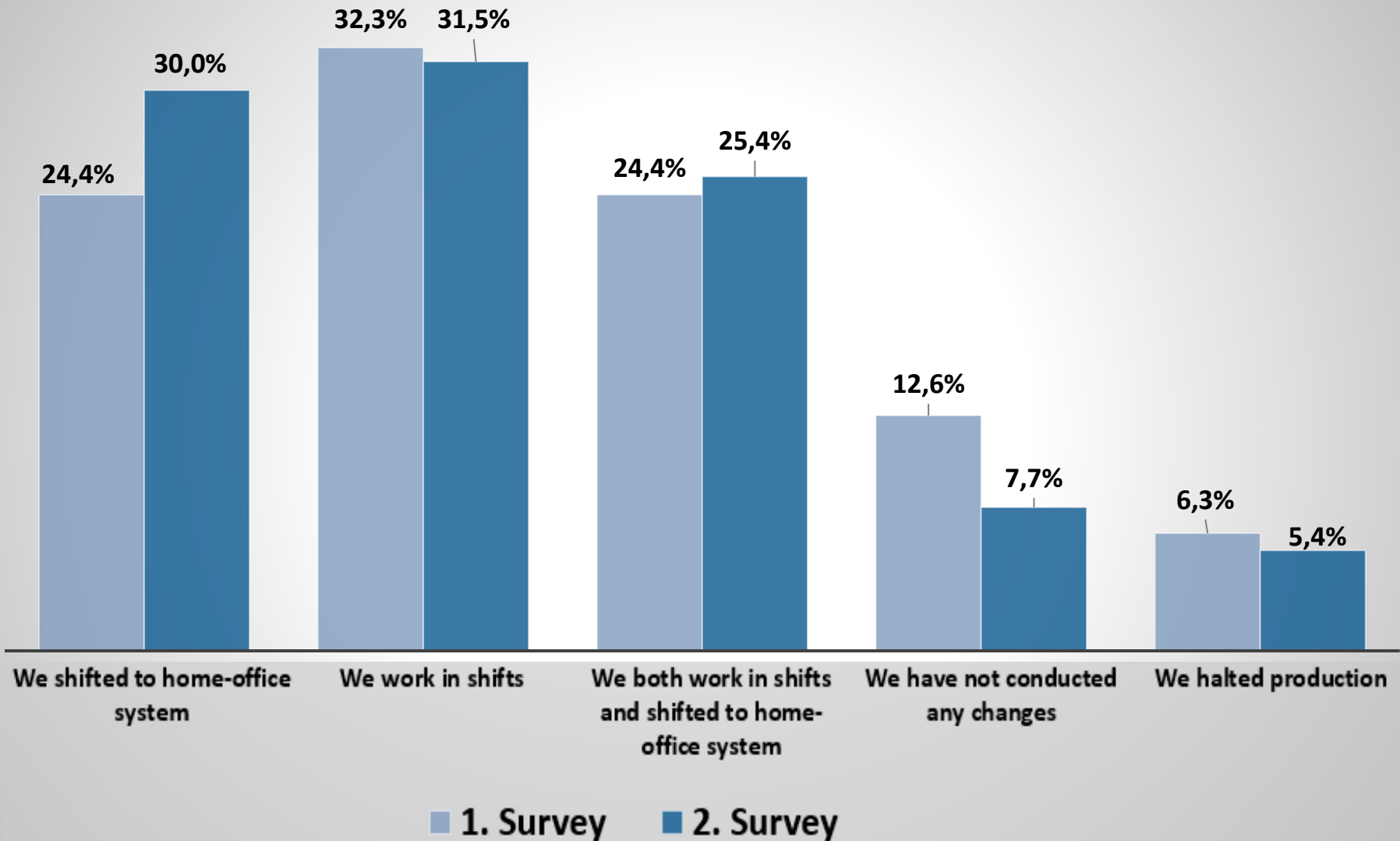
Participation rate in the surveys



Changes in the OSS Members' working conditions



ALL MEMBERS

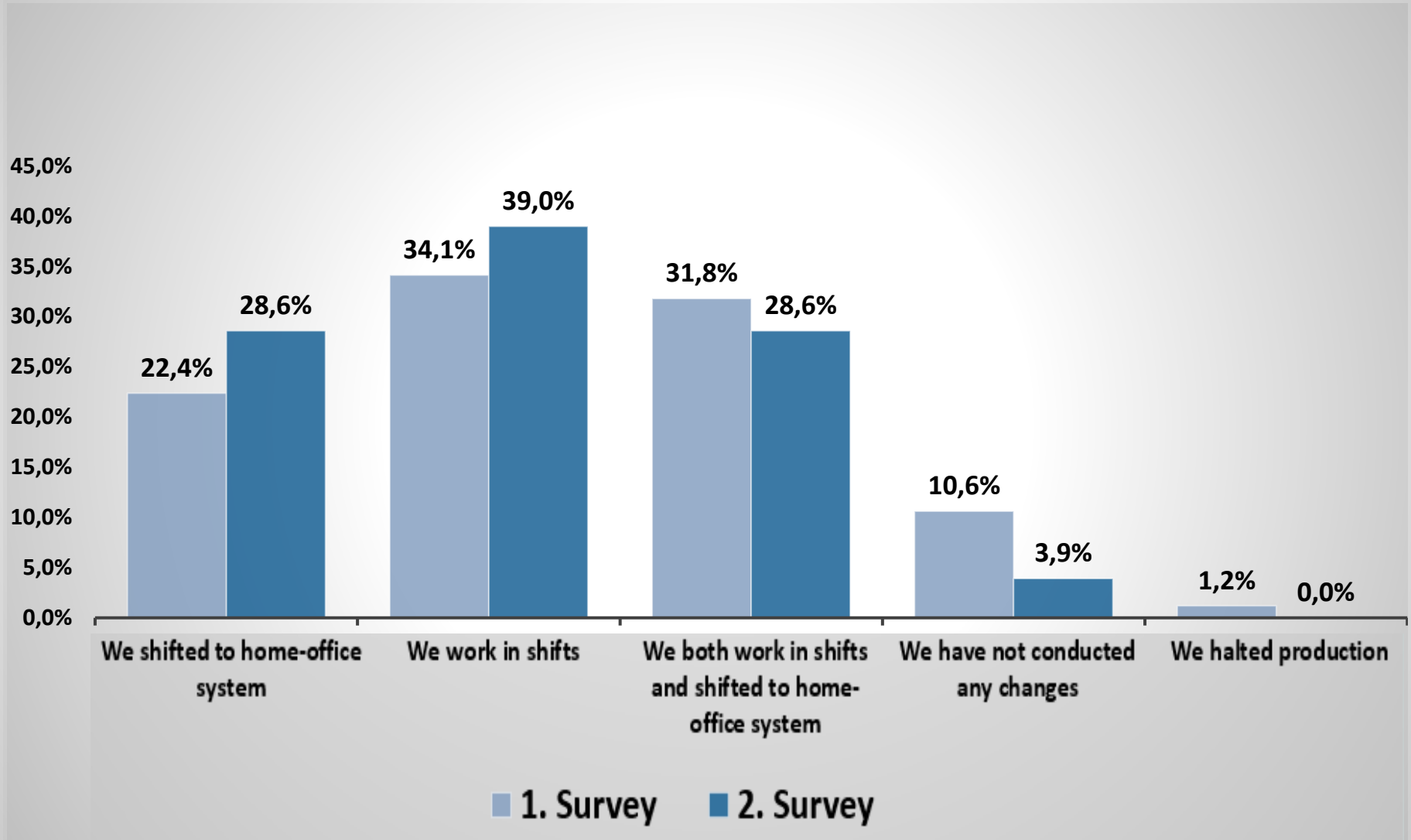


1. Survey : Week of 30 March(week 14)
2. Survey : Week of 13 April (week 16)

Changes in the OSS Members' working conditions



DISTRIBUTOR



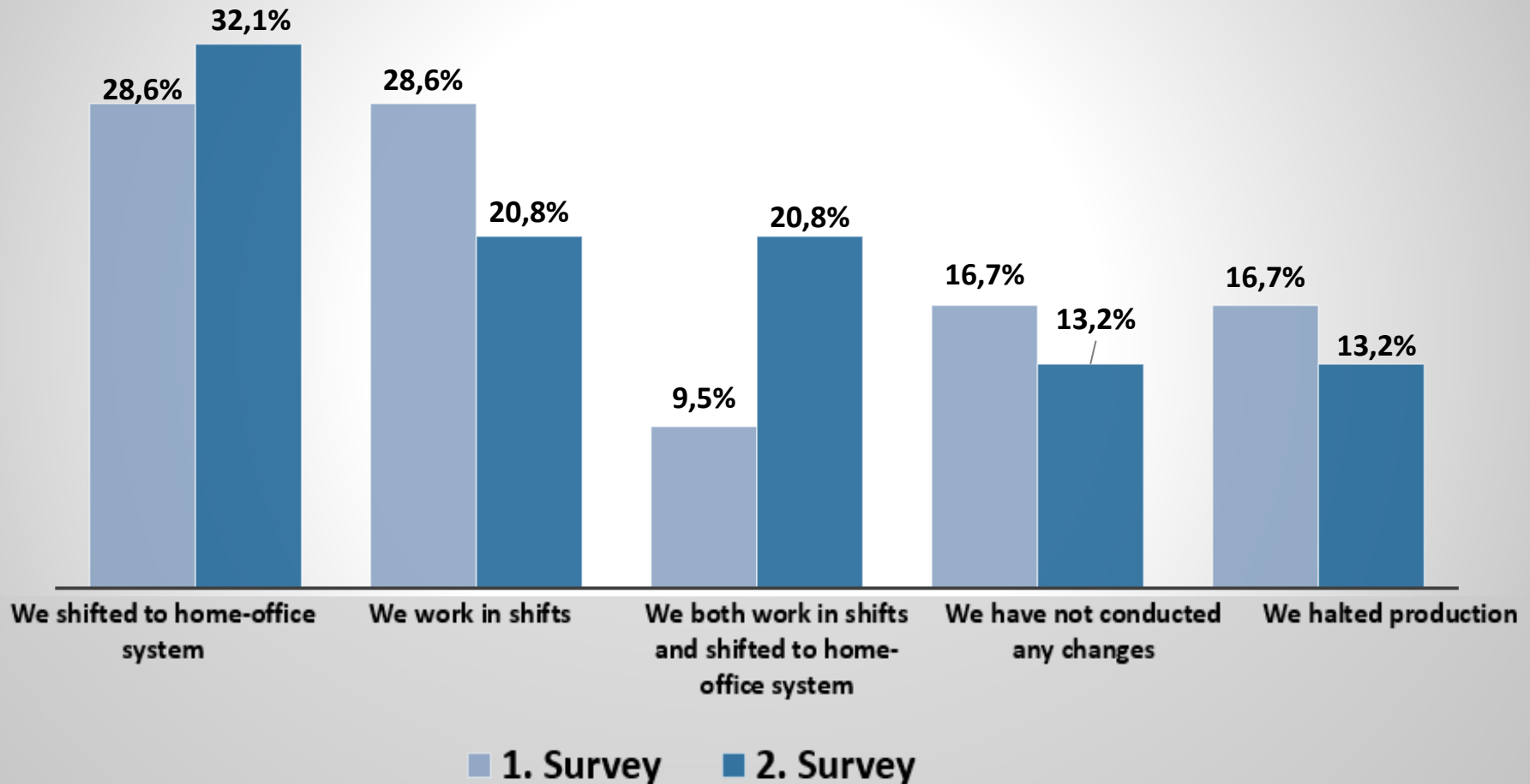
1. Survey : Week of 30 March (week 14)

2. Survey : Week of 13 April (week 16)

Changes in the OSS Members' working conditions



MANUFACTURER



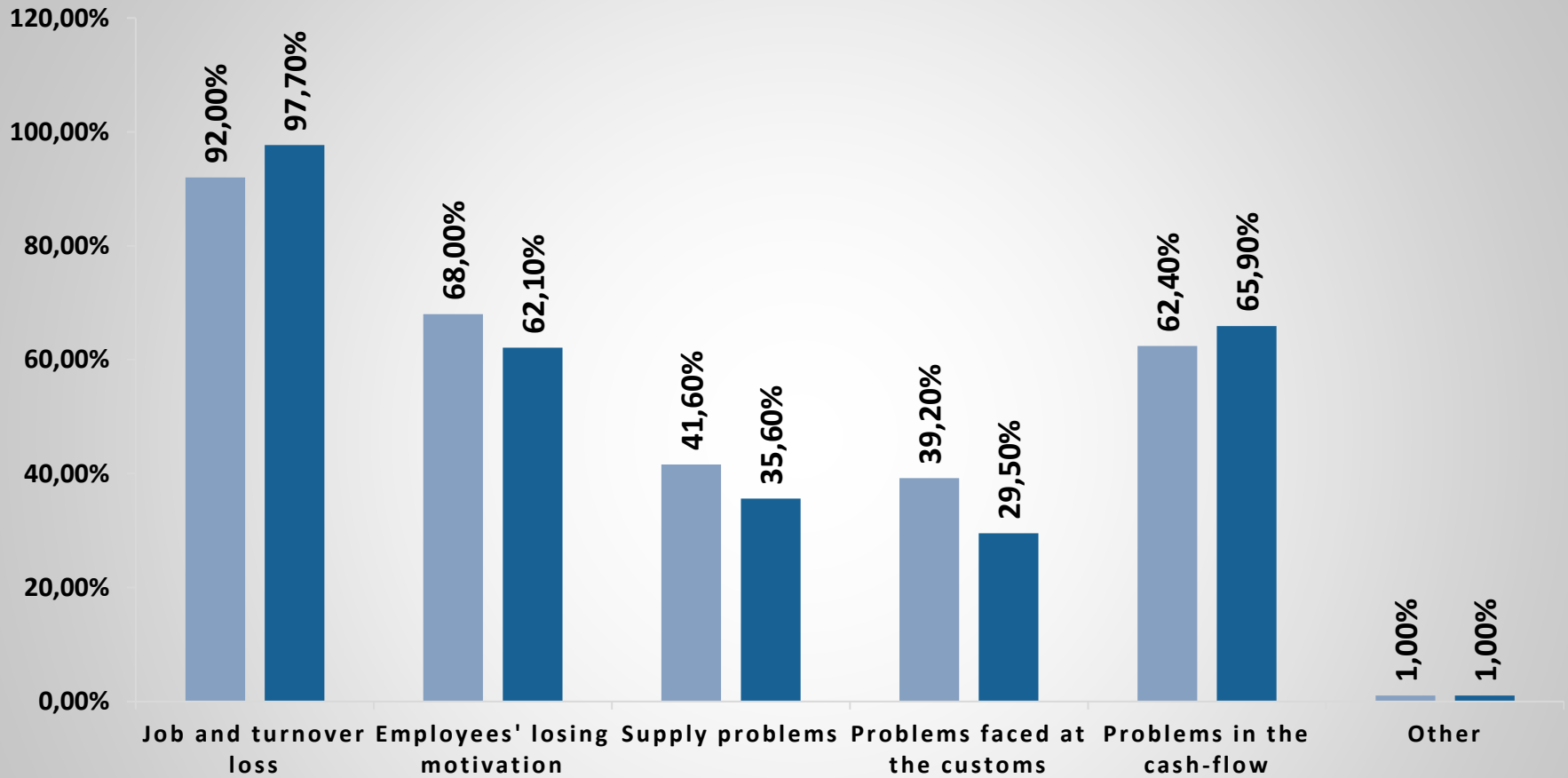
1. Survey : Week of 30 March (Week 14)

2. Survey : Week of 13 April (Week 16)

Problems monitored, during the current crisis period



ALL MEMBERS



■ 1. Survey ■ 2. Survey

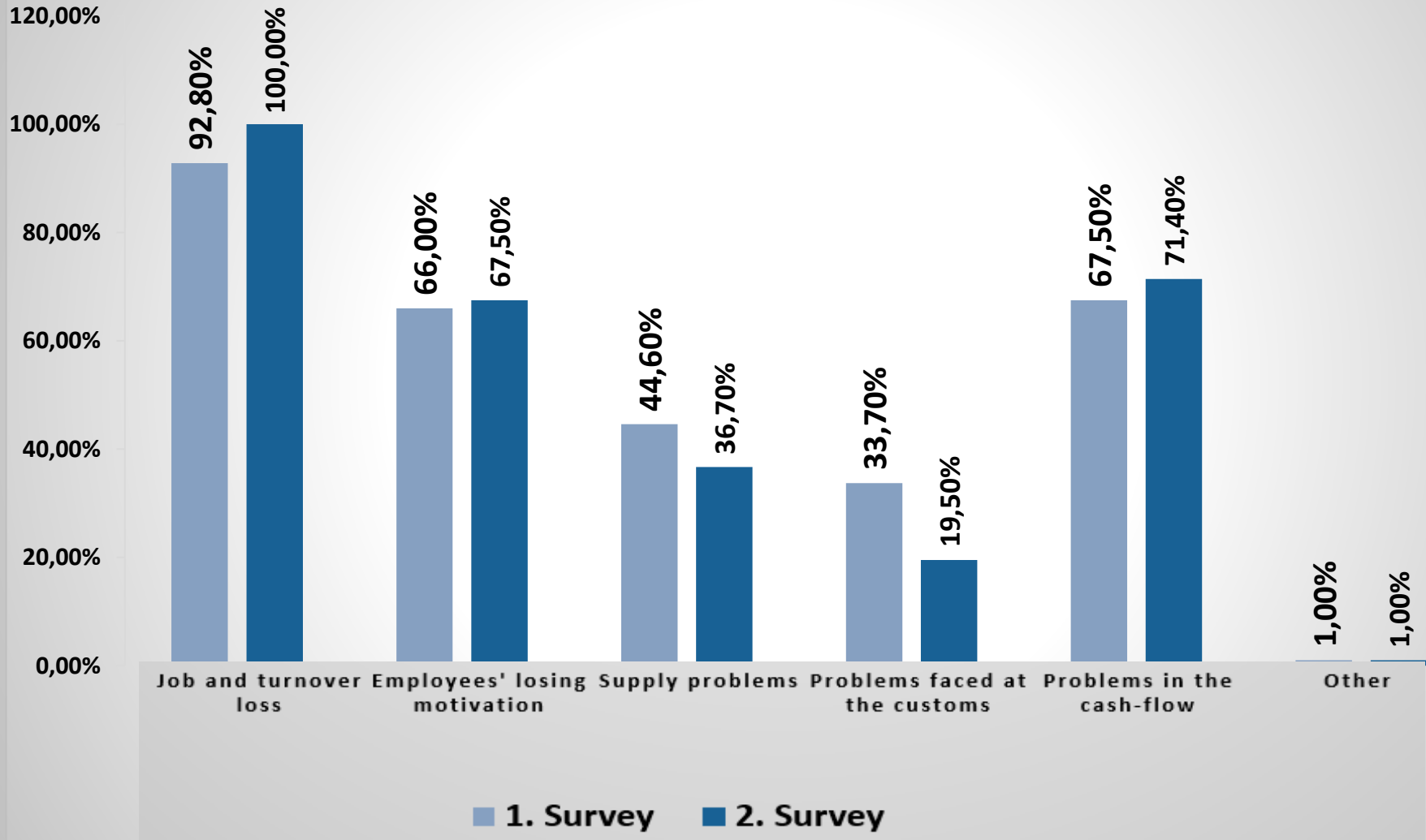
1. Survey : Week of 30 March (week 14)

2. Survey : Week of 13 April (week 16)

Problems monitored, during the current crisis period



DISTRIBUTOR

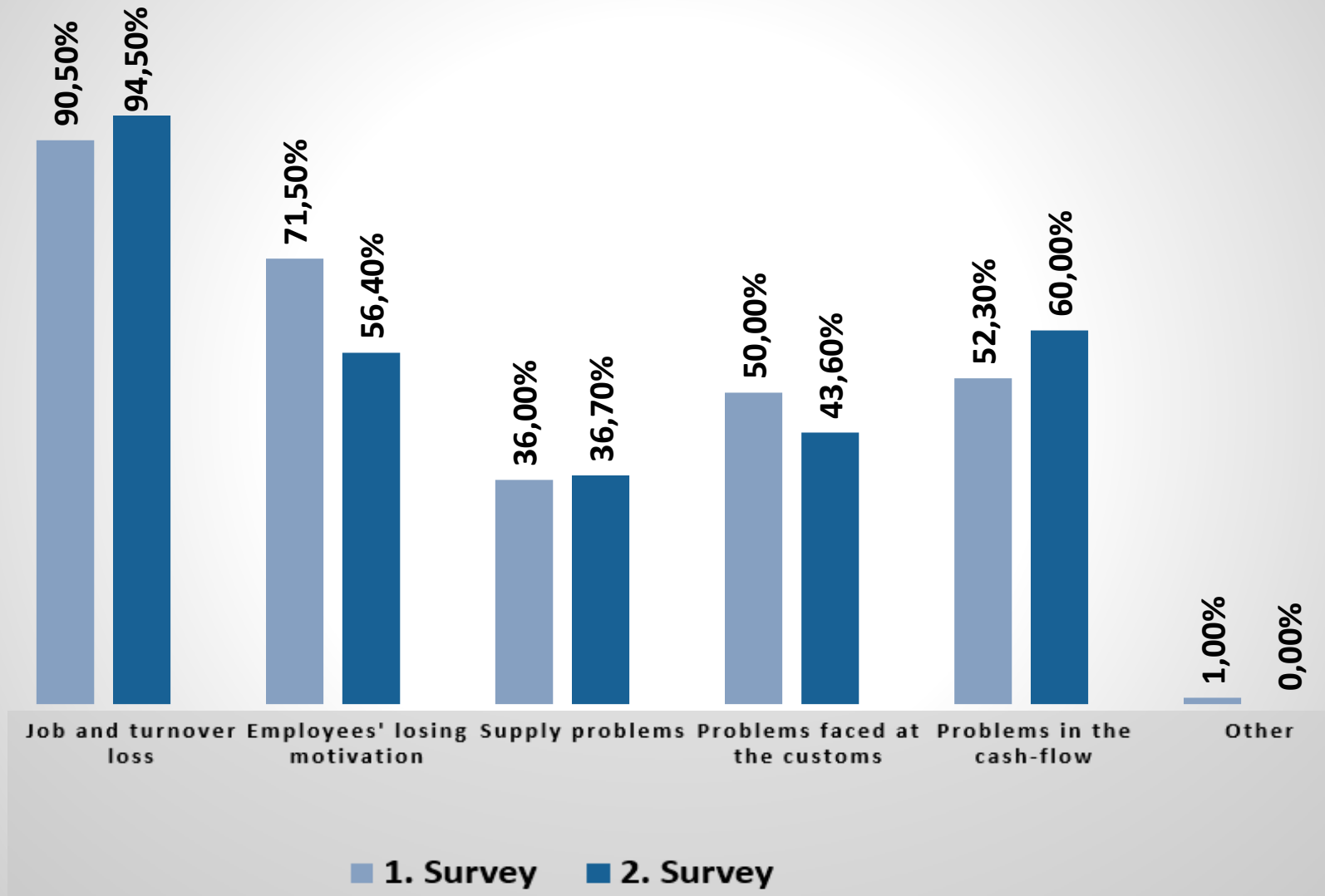


1. Anket : Week of 30 March (week 14)
2. Anket : Week of 13 April (week 16)

Problems monitored, during the current crisis period



MANUFACTURER



■ 1. Survey ■ 2. Survey

- 1. Survey : Week of 30 March (week 14)
- 2. Survey : Week of 13 April (week 16)

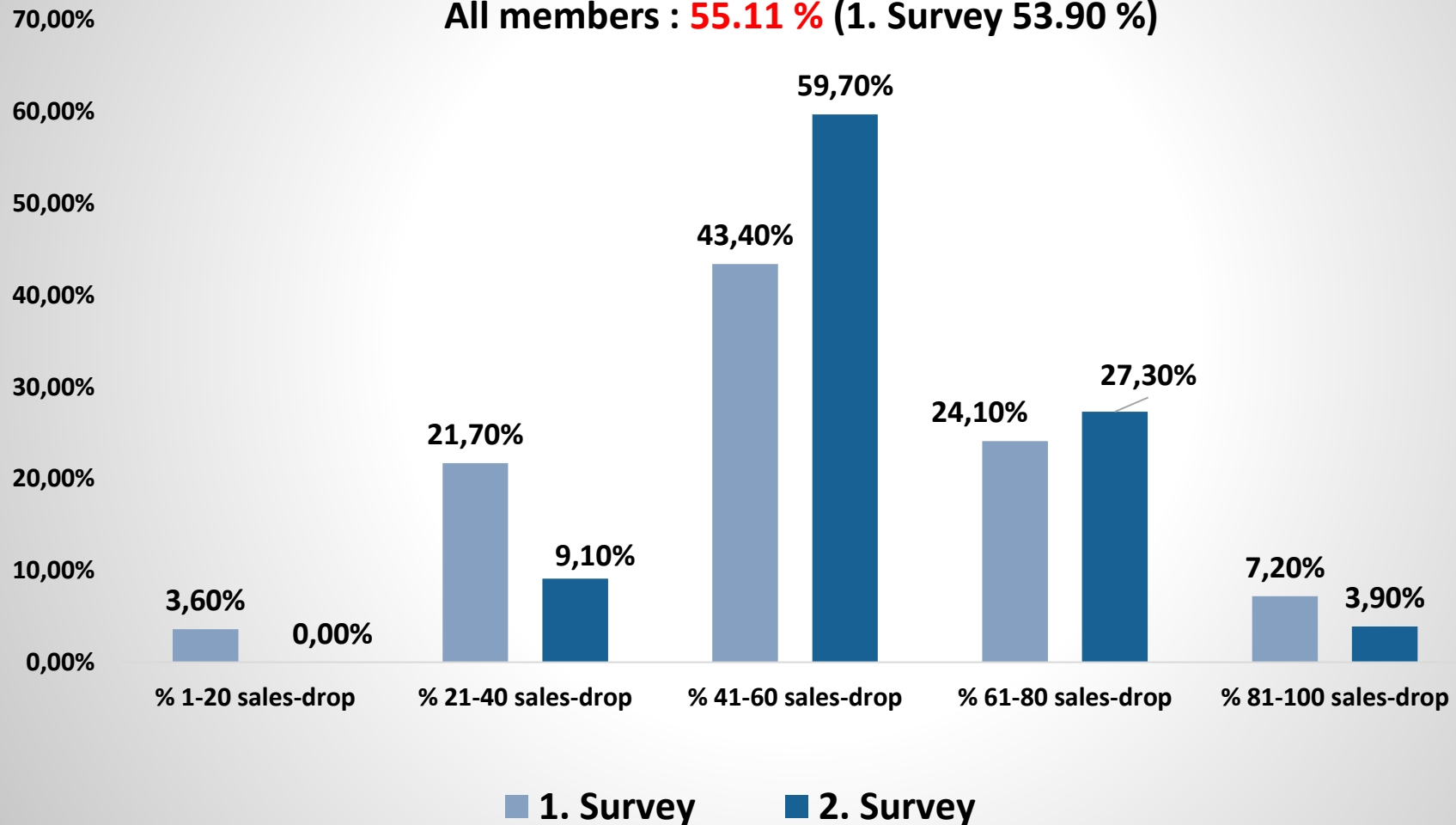
Rates of OSS members' sales drop in April



DISTRIBUTOR

Distributor : **59 %** (1. Survey 55.20 %)

All members : **55.11 %** (1. Survey 53.90 %)



1. Anket : Week of 30 March (week 14)

2. Anket : Week of 13 April (week 16)

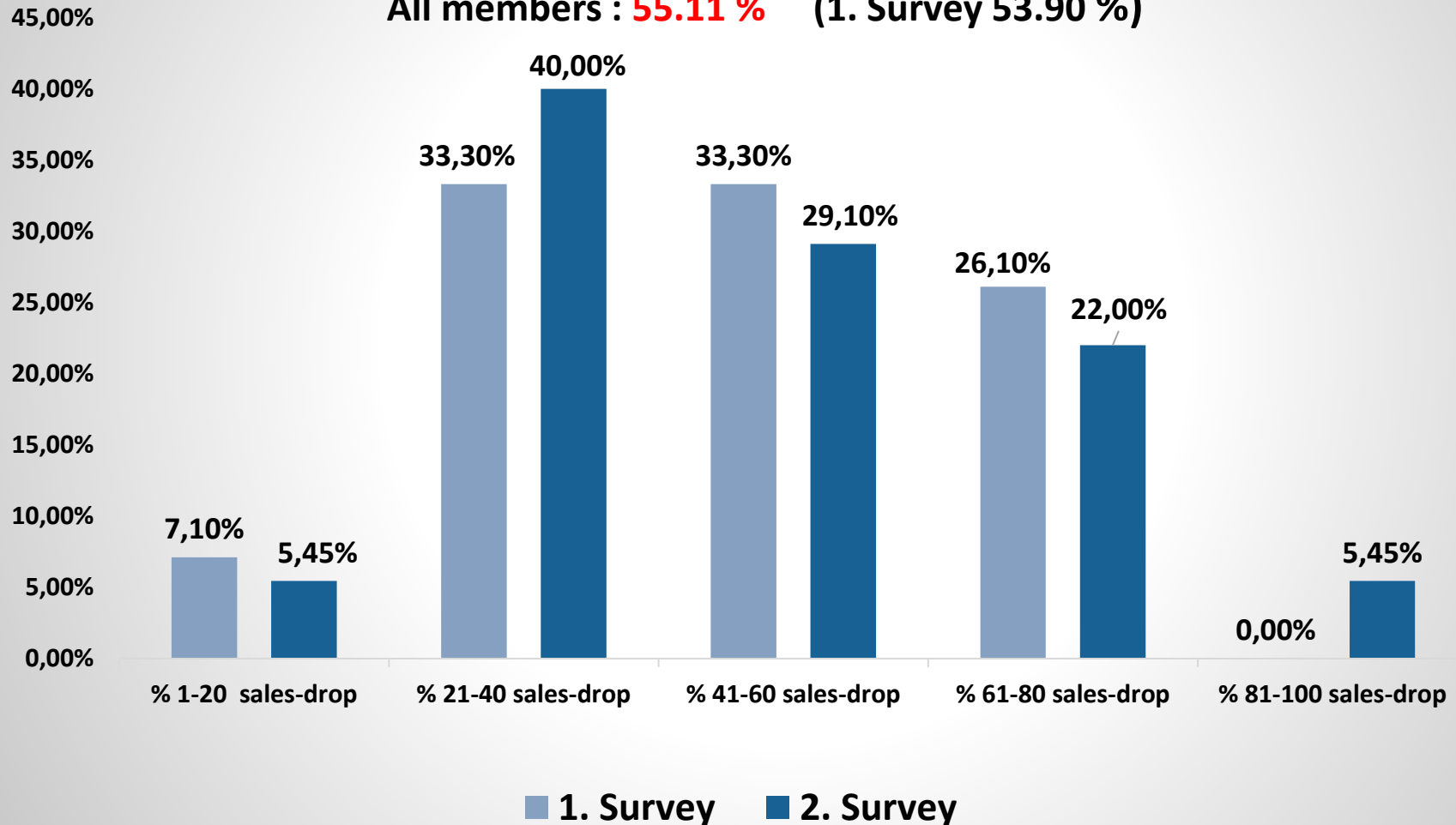
Rates of OSS members' sales drop in April



MANUFACTURER

Manufacturer : **49,70 %** (1. Survey 51.40 %)

All members : **55.11 %** (1. Survey 53.90 %)



1. Survey : Week of 30 March (week 14)

2. Survey : Week of 13 April (week 16)

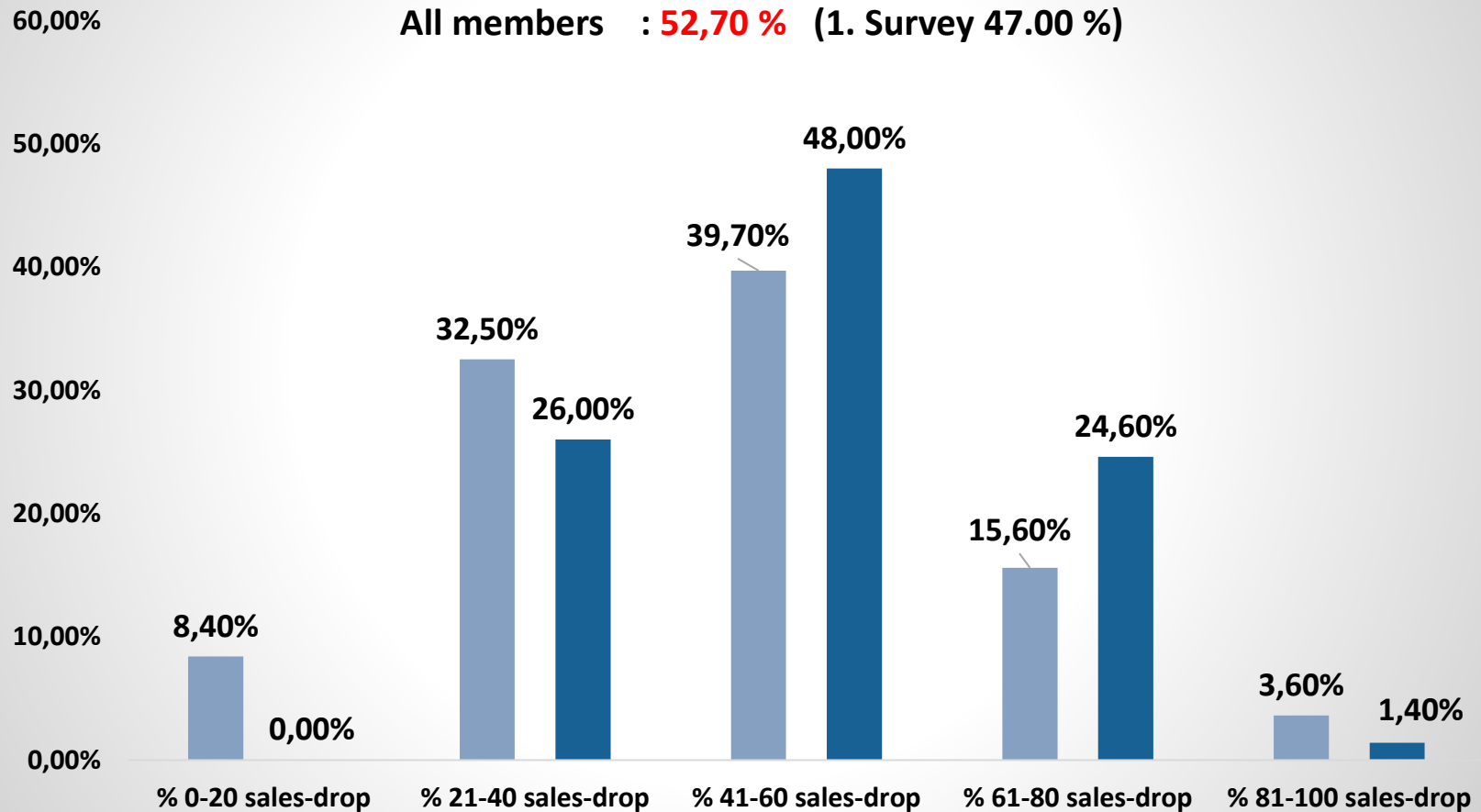
Rates of OSS members' sales drop in May



DISTRIBUTOR

Distributor : **54,70 %** (1. Survey 47.70 %)

All members : **52,70 %** (1. Survey 47.00 %)



■ 1. Survey

■ 2. Survey

1. Survey : Week of 30 March (week 14)

2. Survey : Week of 13 April (week 16)

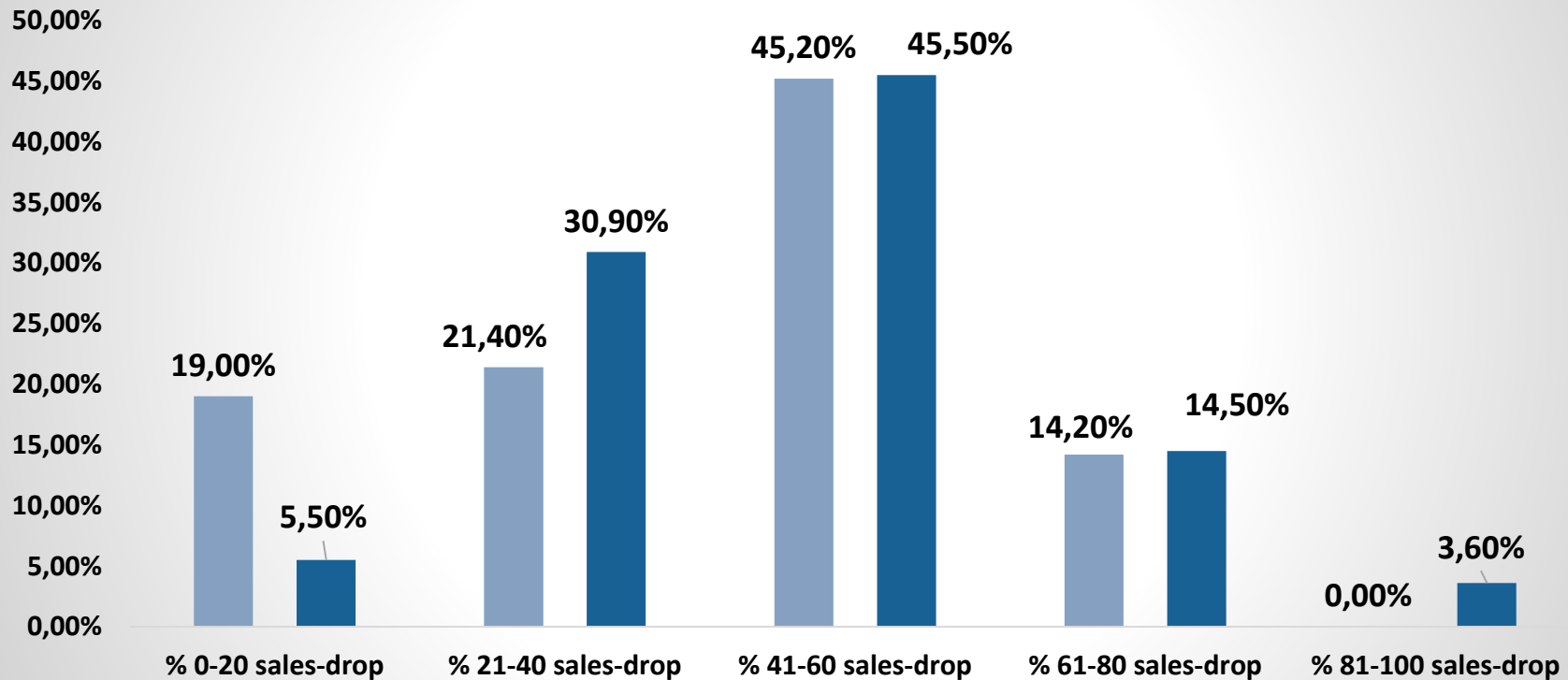
Rates of OSS members' sales drop in May



MANUFACTURER

Manufacturer : **49,94 %** (1. Survey 45.70 %)

All members : **52.70 %** (1. Survey 47.00 %)



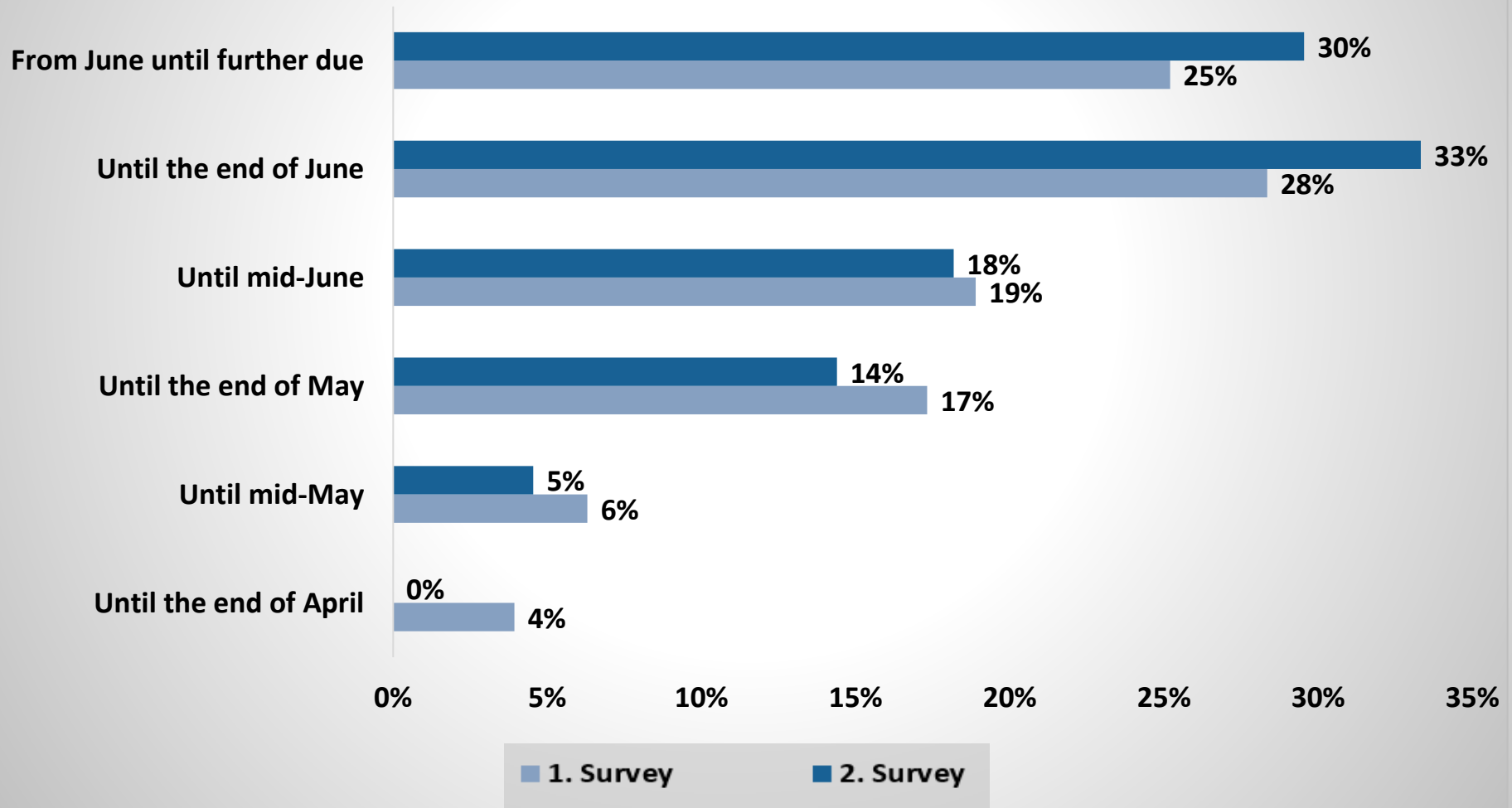
■ 1. Survey

■ 2. Survey

1. Survey : Week of 30 March (week 14)

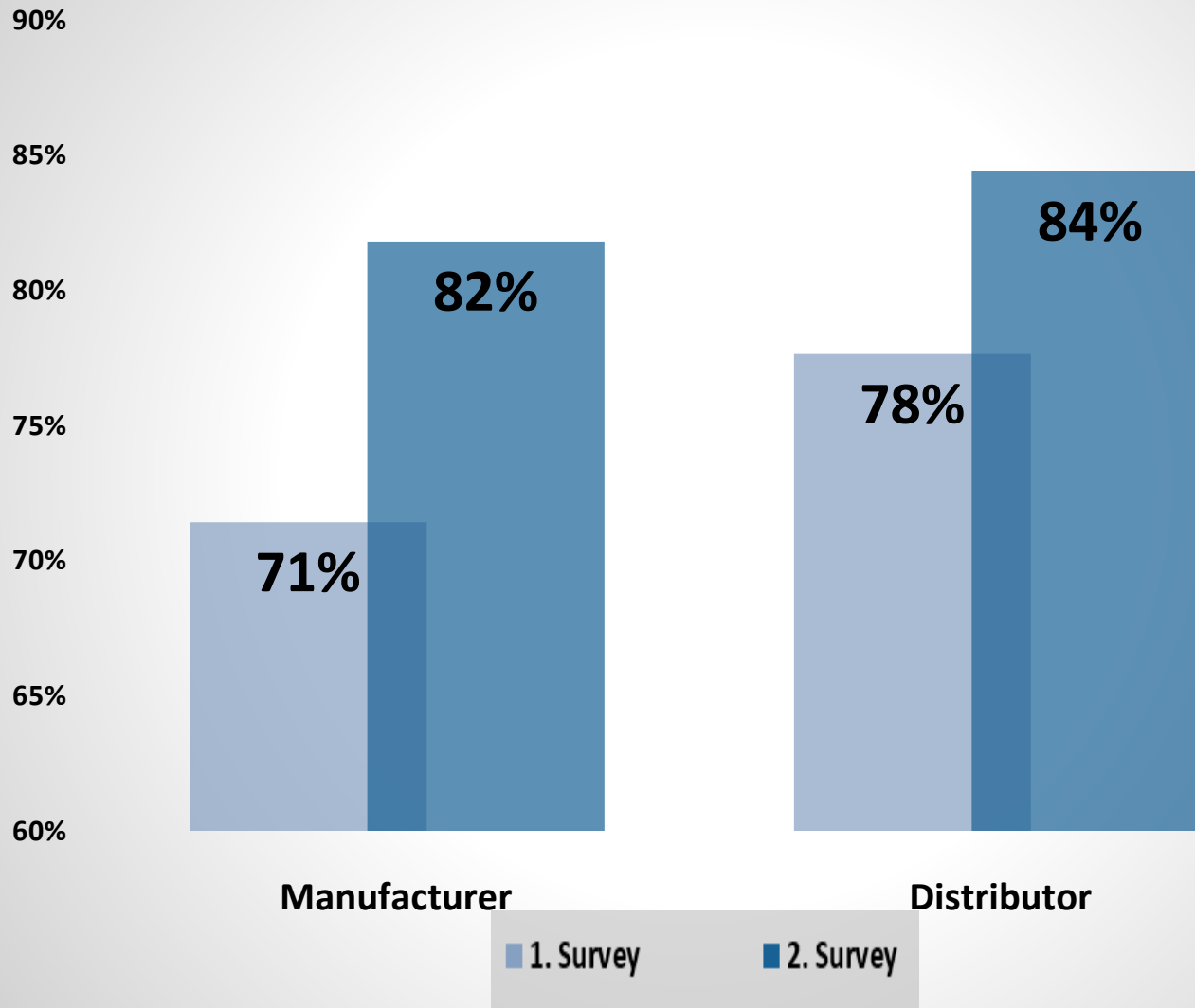
2. Survey : Week of 13 April (week 16)

Our members' predictions on the duration of the crisis and its effects



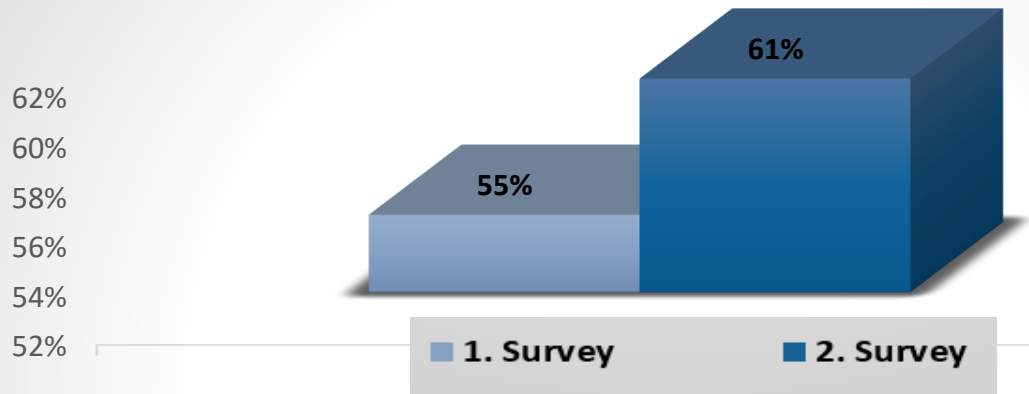
- 1. Survey : Week of 30 March (week 14)
- 2. Survey : Week of 13 April (week 16)

The rate of our members taking additional measures against a possible cash flow risk



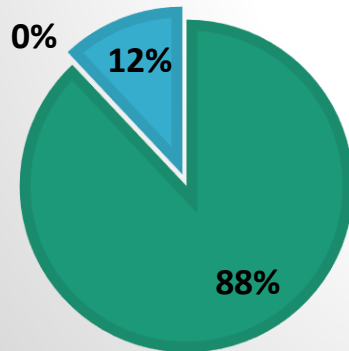
1. Survey : Week of 30 March (week 14)
2. Survey : Week of 13 April (week 16)

Proportion of members who applied to Turkish Employment Agency for Short-Term Working Allowance

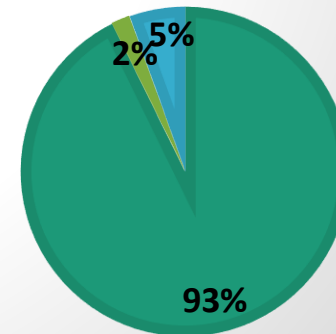


Application results

MANUFACTURER



DISTRIBUTOR



- We have applied and are waiting for the response
- We have applied and received a negative response
- We have applied and received an affirmative response

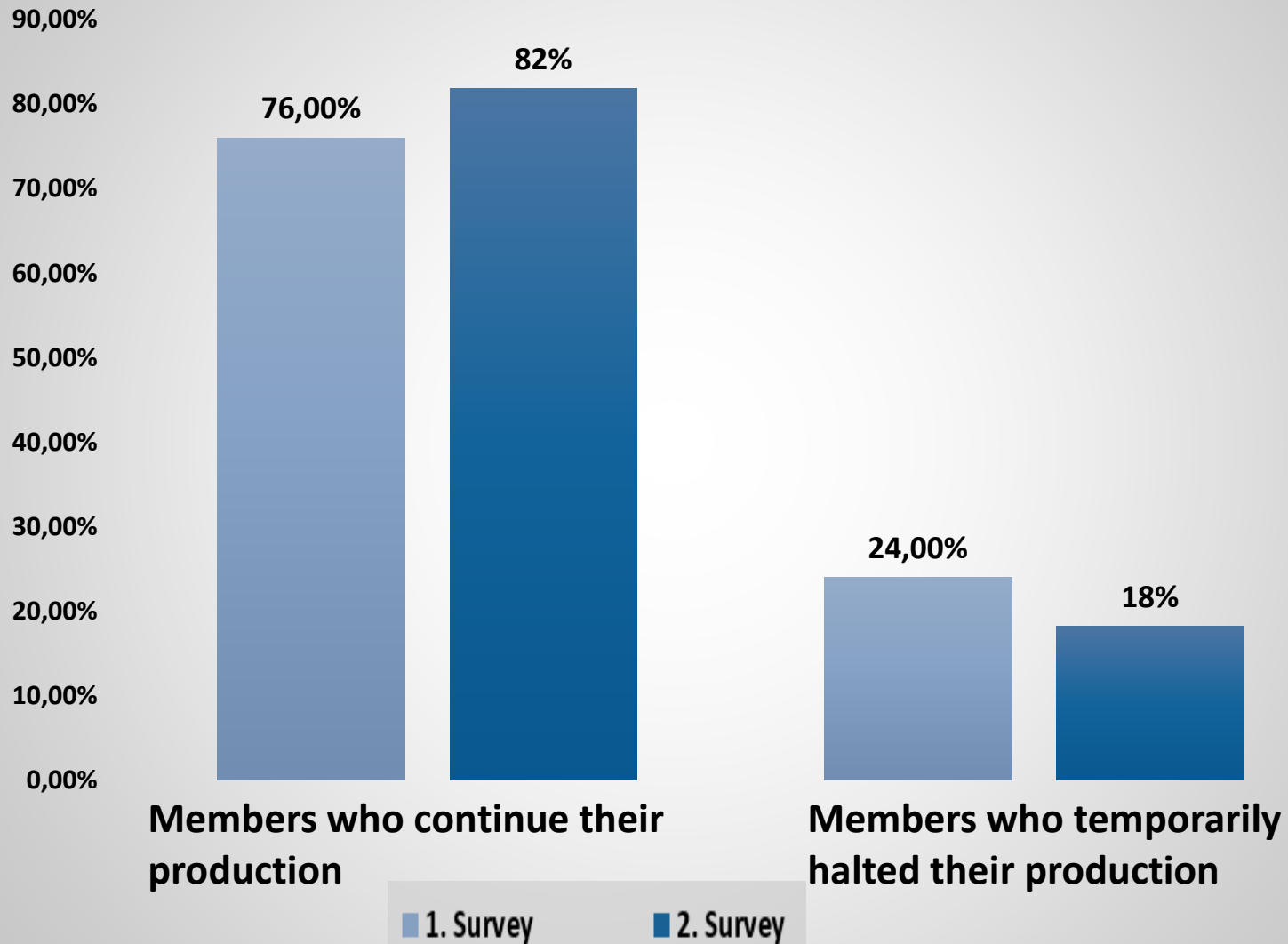
1. Survey : Week of 30 March (week 14)
2. Survey : Week of 13 April (week 16)



Manufacturers' Section



The rate of OSS member manufacturers who will continue their production

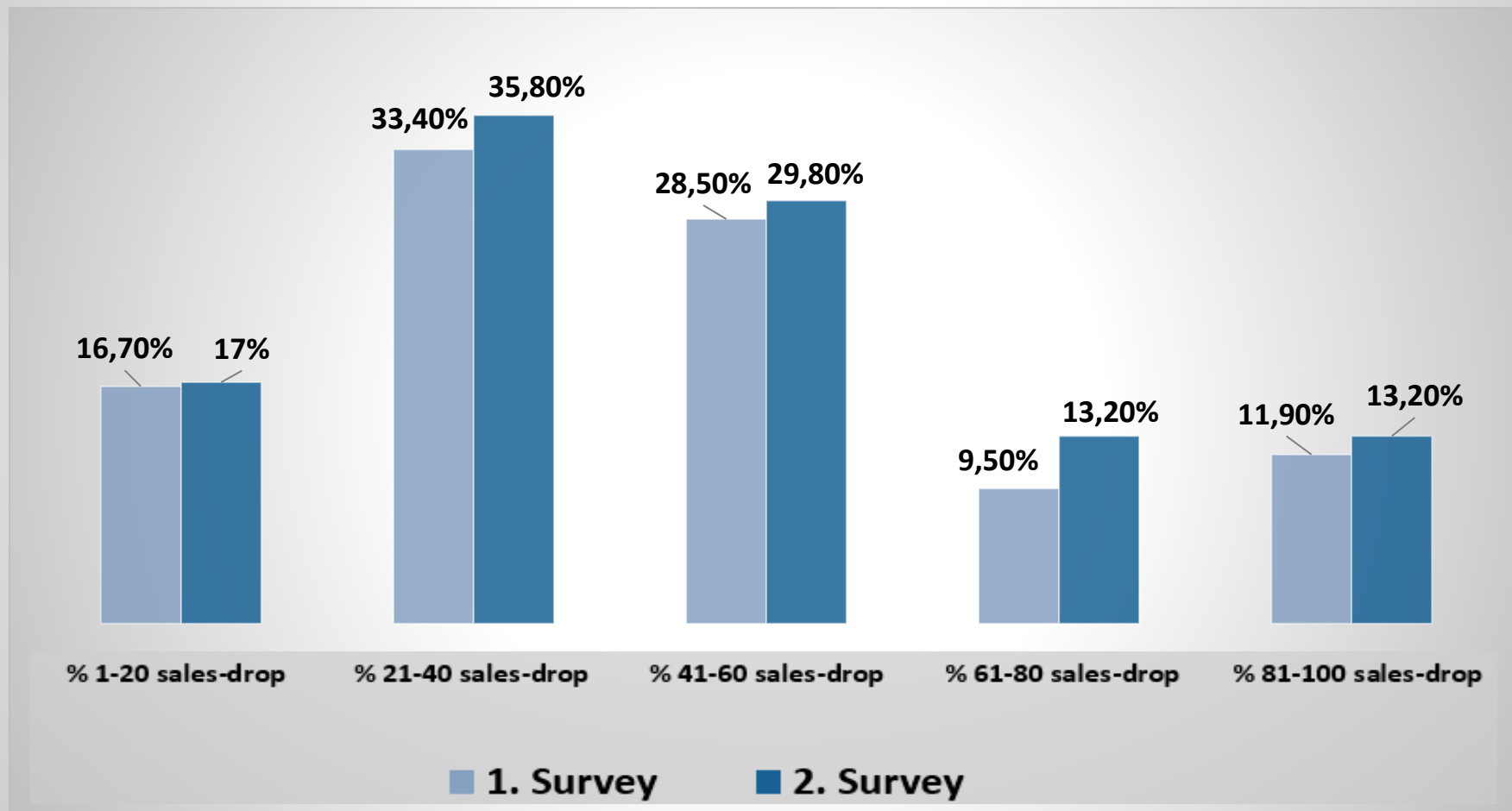


1. Survey : Week of 30 March (week 14)
2. Survey : Week of 13 April (week 16)

Production drop rate of the OSS members Manufacturers in April



Average : **48,05 %** (1. Survey : **46,9 %**)

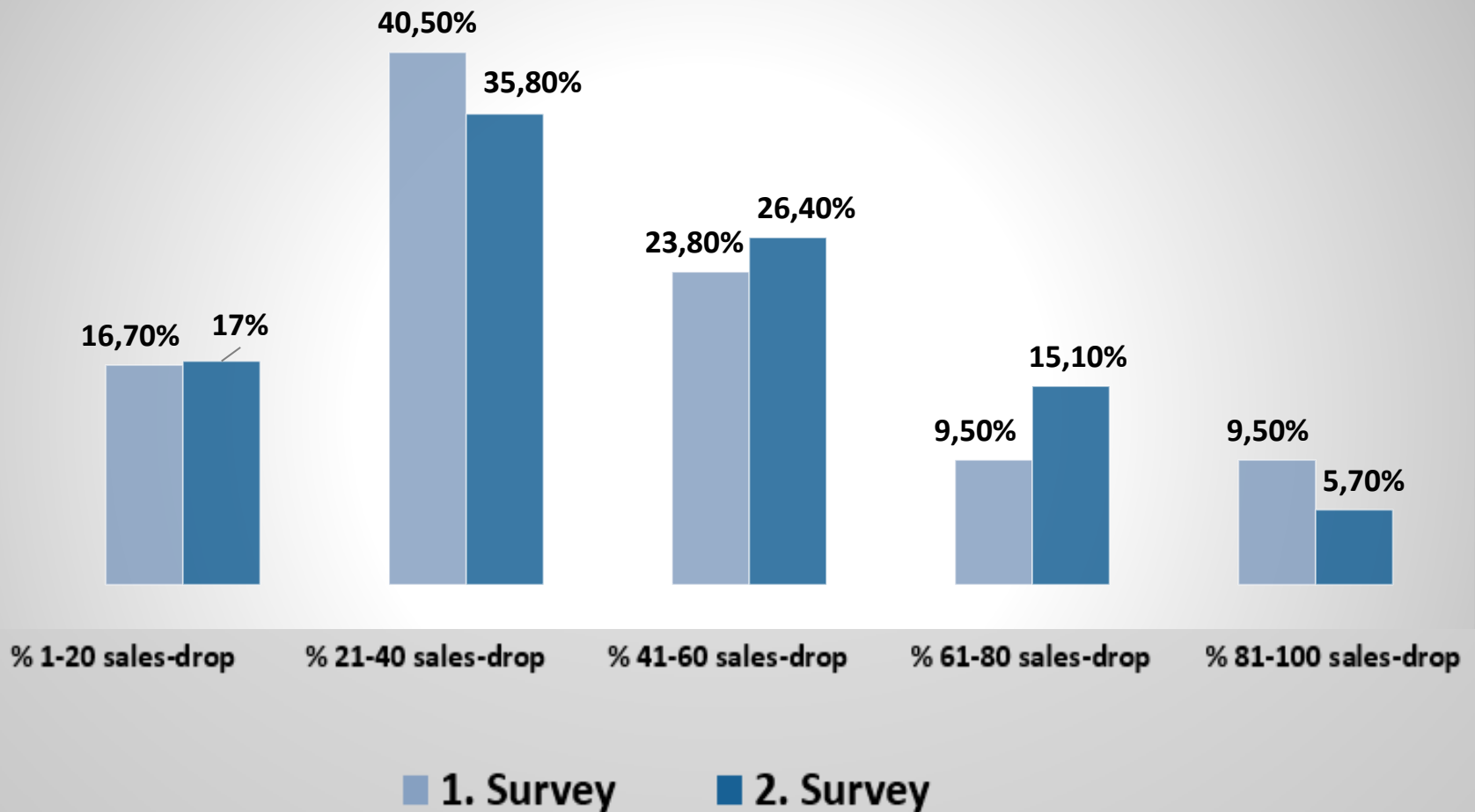


- 1. Survey : Week of 30 March (week 14)
- 2. Survey : Week of 13 April (week 16)

Forecast for the member manufacturers' production drop rate in May



Average: **44,00 %** (1. Survey : **46,9 %**)



- 1. Survey : Week of 30 March (week 14)
- 2. Survey : Week of 13 April (week 16)



Thank you...