

ECONOMY AND STRATEGY CONSULTANCY SERVICES



**ESDH**

EKONOMİ VE STRATEJİ DANIŞMANLIK HİZMETLERİ

# DÜNYA VE TÜRKİYE EKONOMİ VE HAZIR GİYİM SEKTÖRÜ 2021 YILI GELİŞMELERİ VE BEKLENTİLERİ



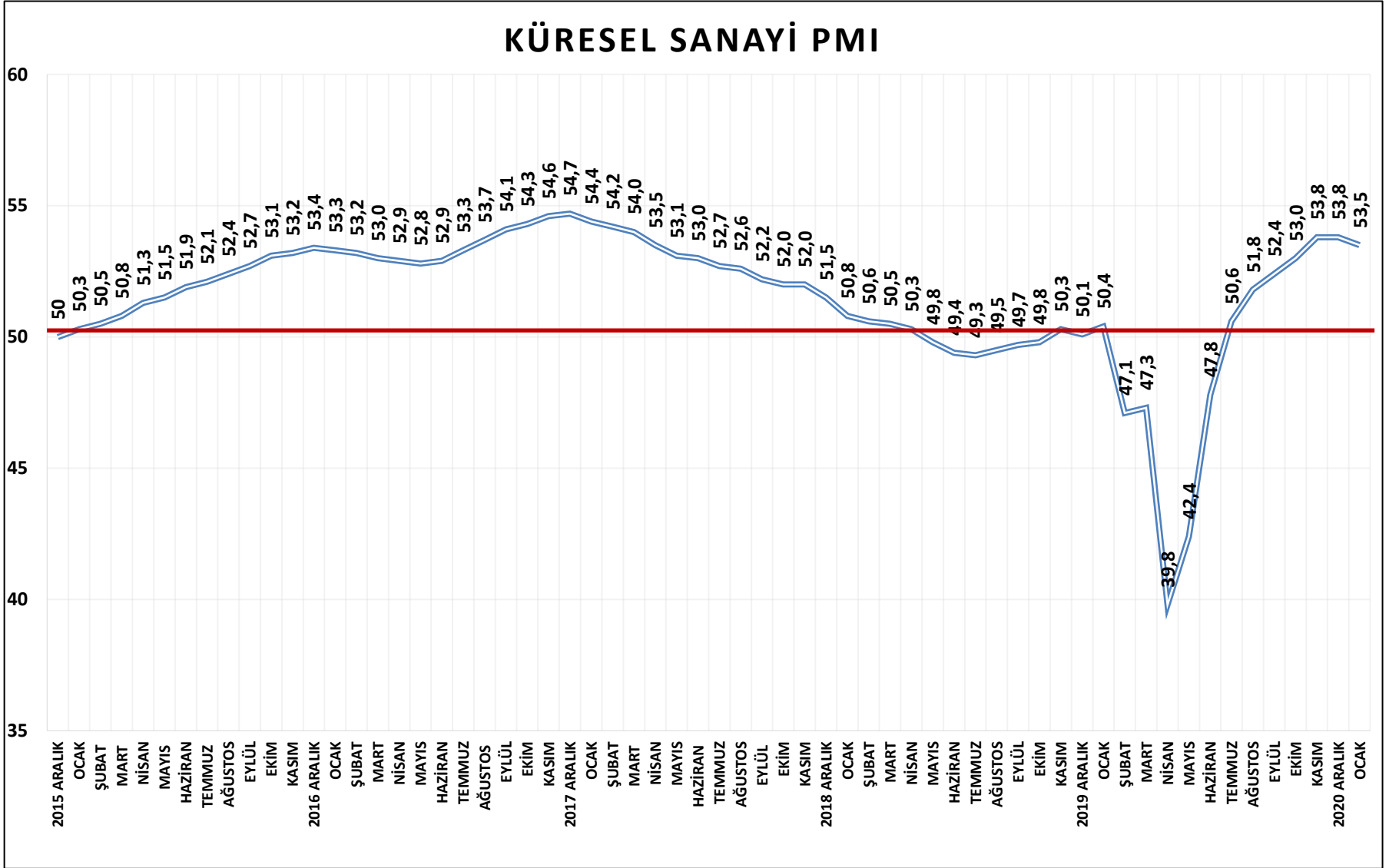
EKONOMİ VE STRATEJİ DANIŞMANLIK HİZMETLERİ

8 ŞUBAT 2021

# DÜNYA EKONOMİSİ 2021 YILI BAŞLANGICI İLK VERİLER NELER ANLATIYOR?

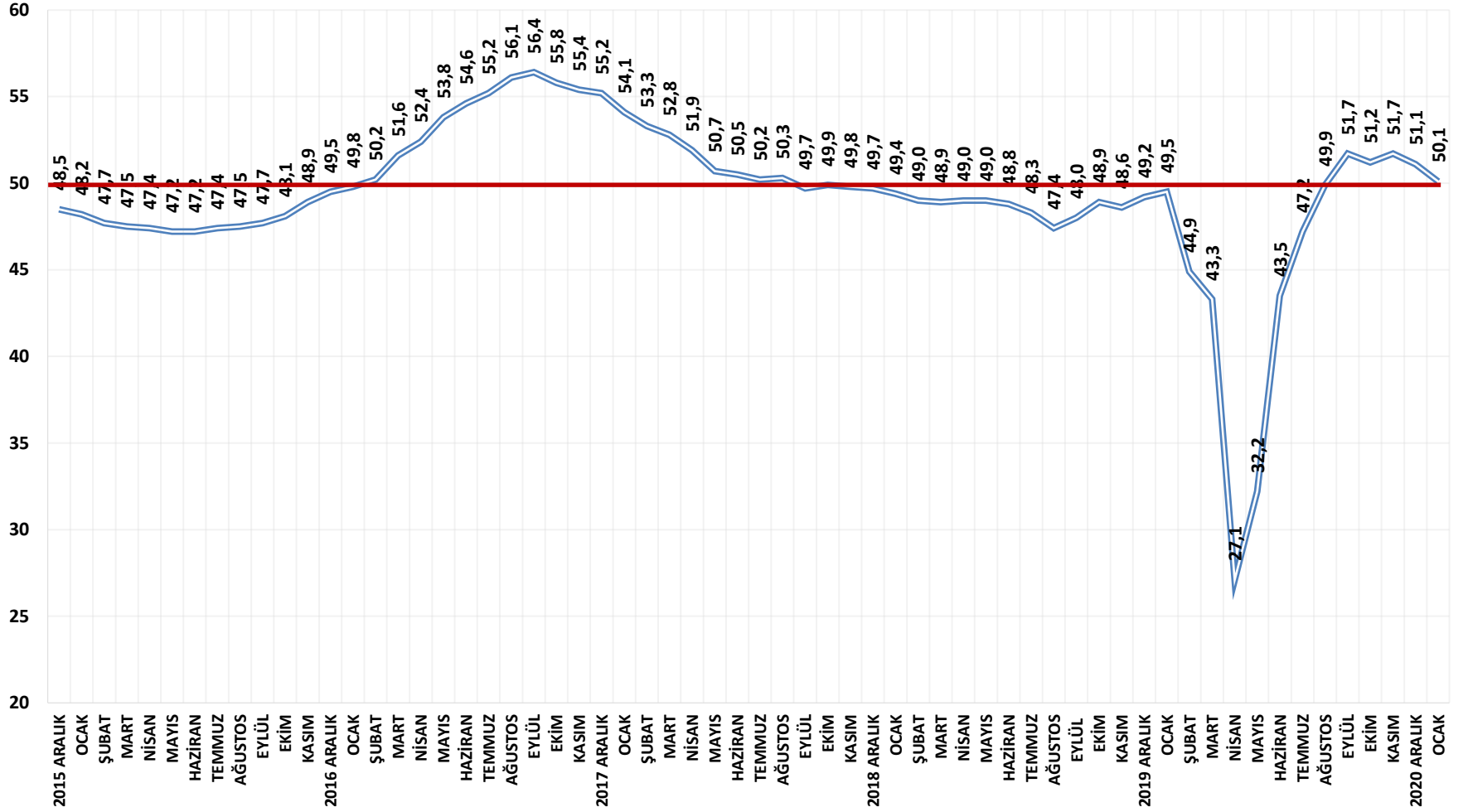


## KÜRESEL SANAYİ ÜRETİMİNDE BÜYÜME YENİ YILDA DA SÜRÜYOR



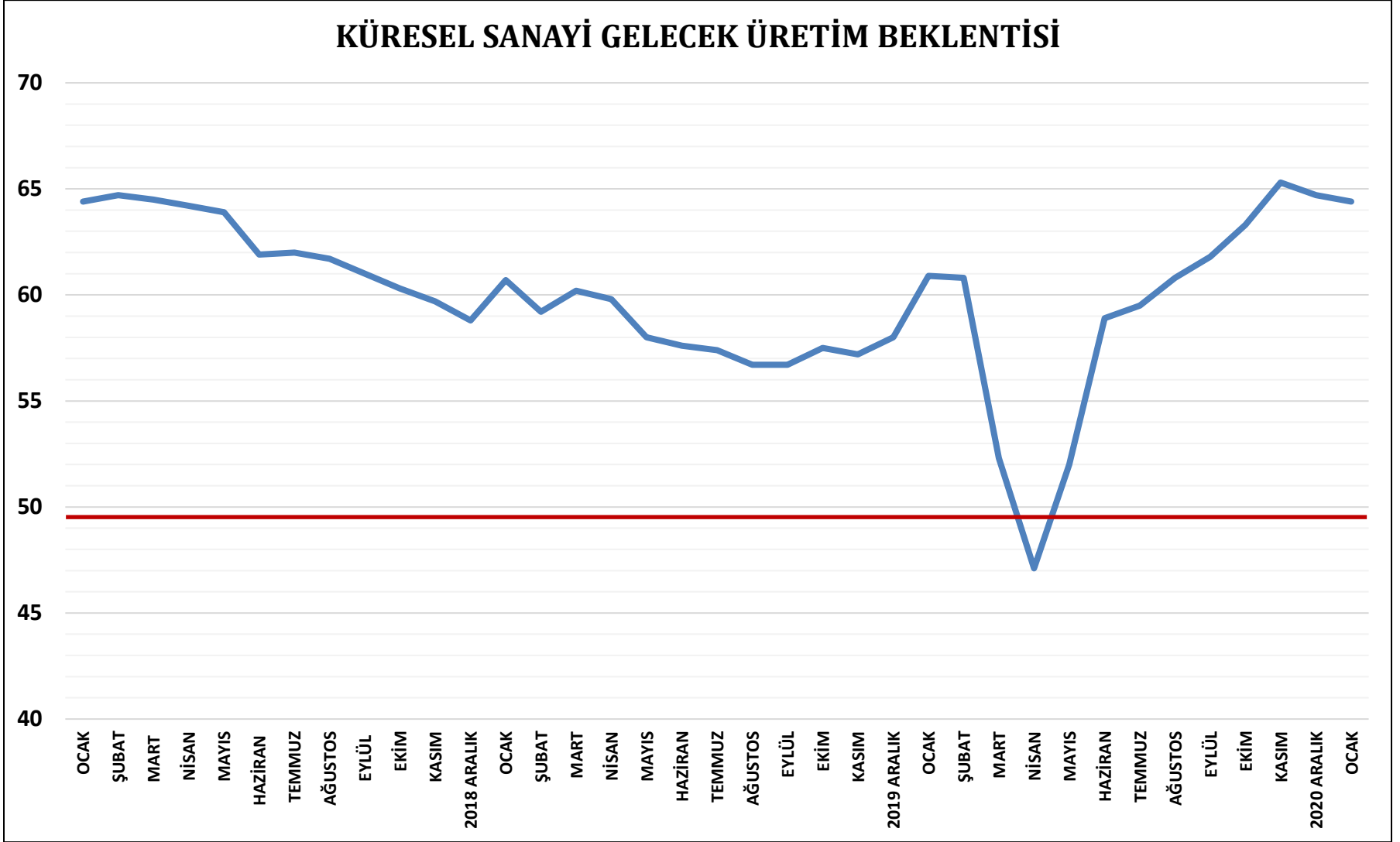
## KÜRESEL SANAYİDE YENİ ALINAN İHRACAT SİPARİŞLERİ ZAYIFLIYOR

## YENİ ALINAN İHRACAT SİPARİŞLERİ



## GELECEK ÜRETİM BEKLENTİSİ HALEN YÜKSEK SEYREDİYOR

## KÜRESEL SANAYİ GELECEK ÜRETİM BEKLENTİSİ

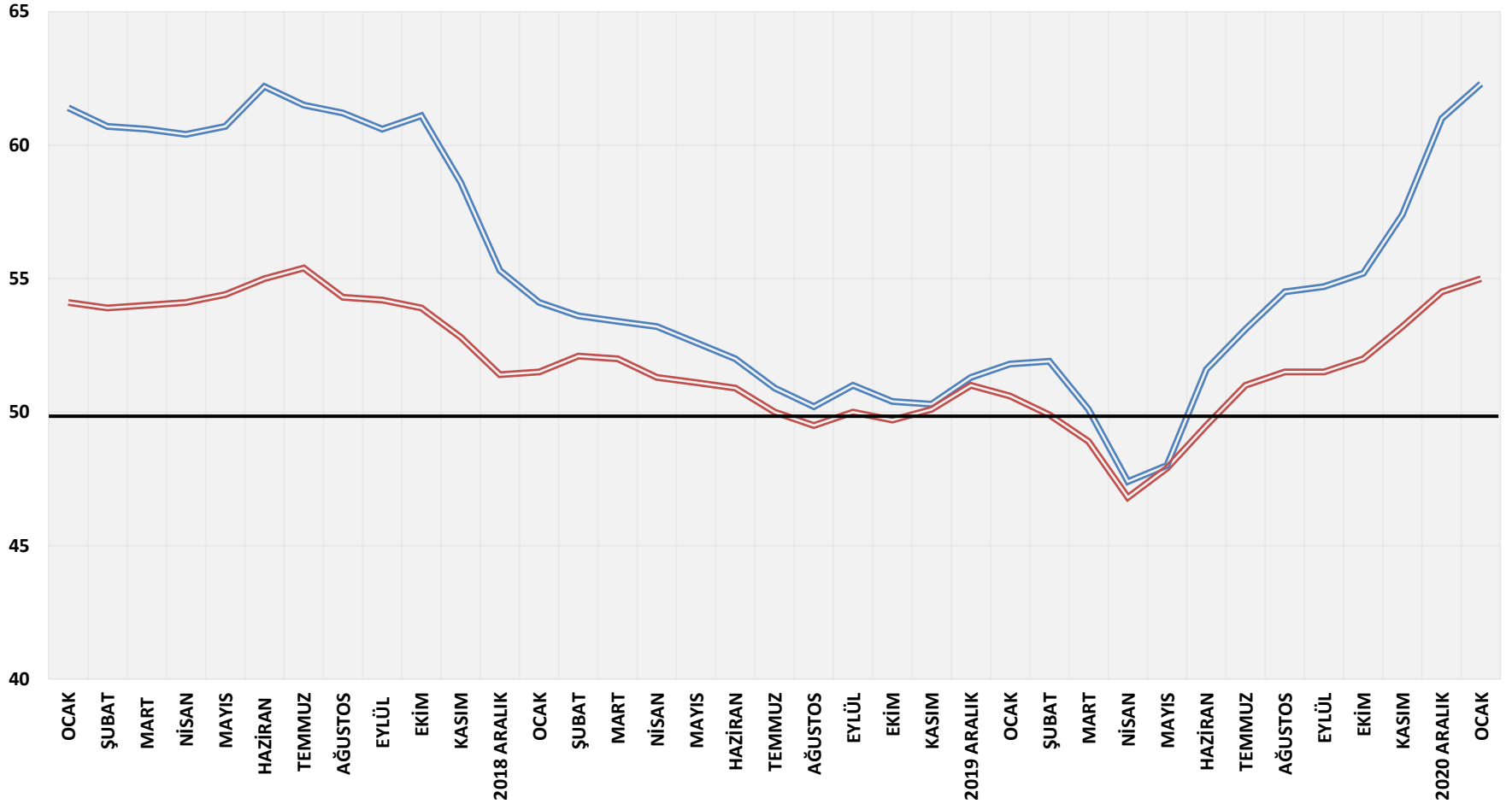


## KÜRESEL GİRDİ VE ÇIKTI FİYATLARINDA ARTIŞ YAŞANIYOR

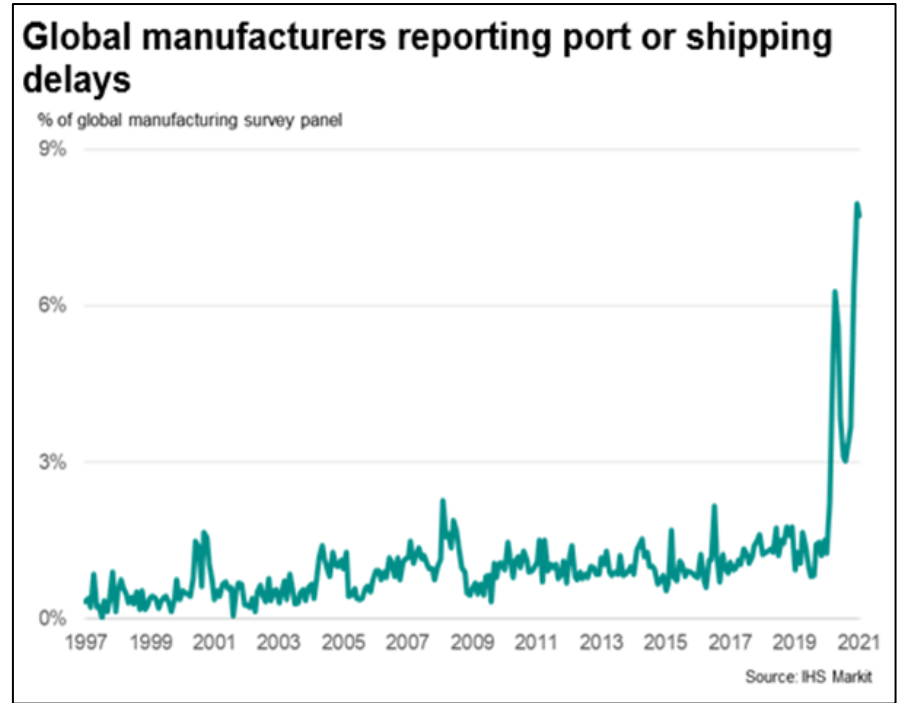
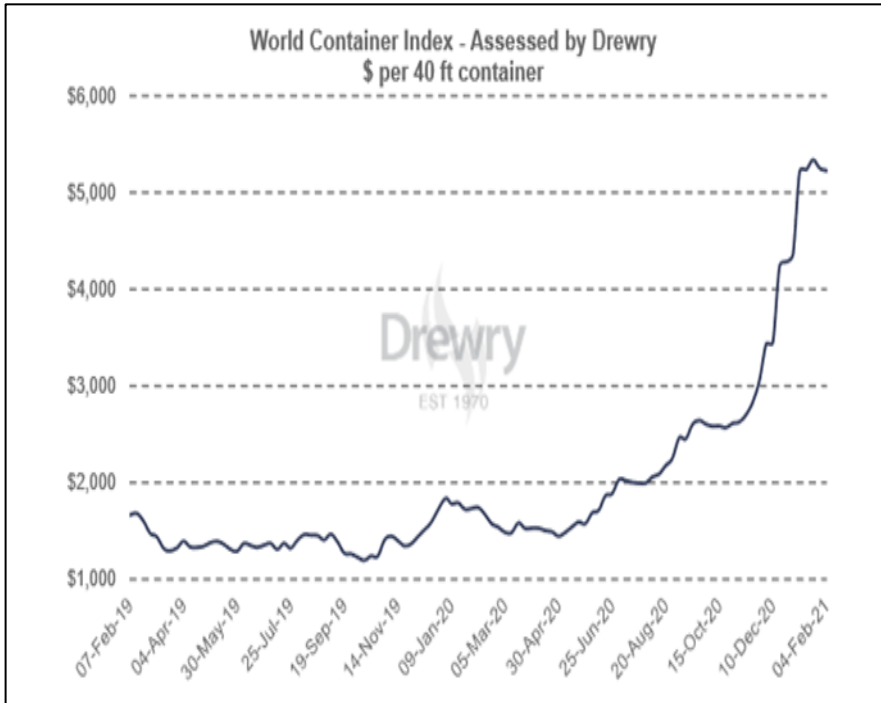
## KÜRESEL SANAYİ GİRDİ VE ÇIKTI FİYATLARI

KÜRESEL SANAYİ GİRDİ FİYATLARI PMI

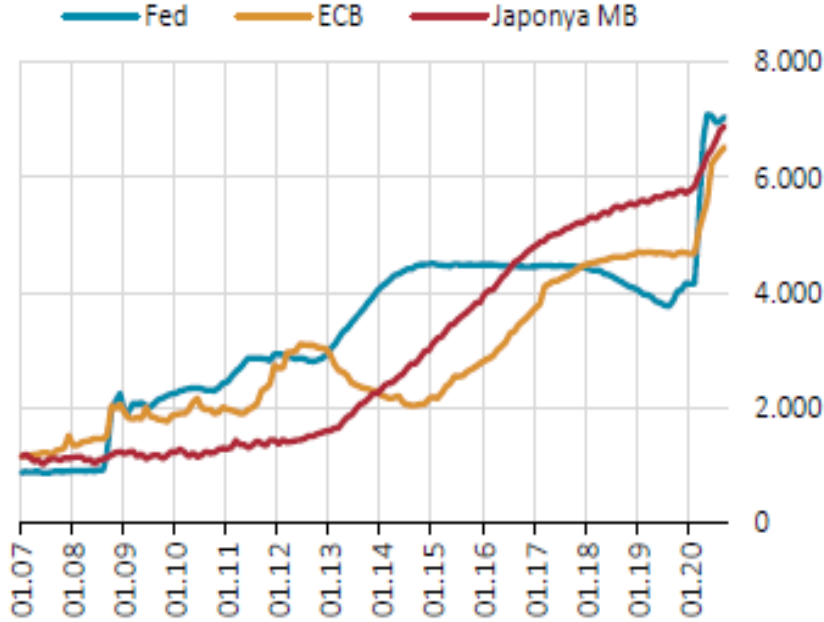
KÜRESEL SANAYİ ÜRÜN FİYATLARI PMI



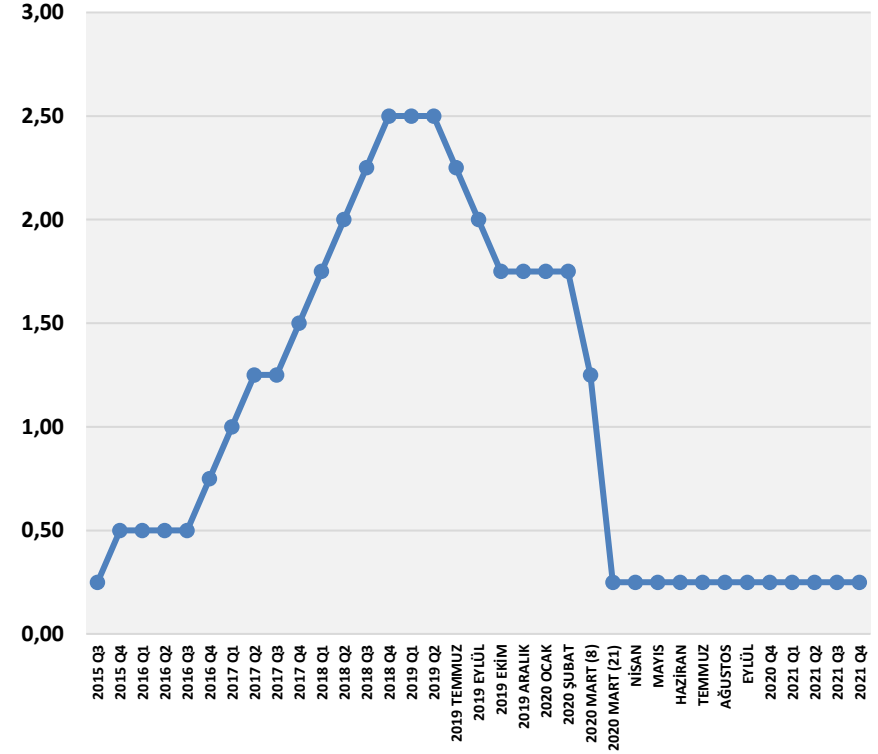
# YÜKSEK TAŞIMACILIK DENİZ NAVLUN FİYATLARI DEVAM EDİYOR, YÜKLEMELERDE GECİKMELER DE SÜRÜYOR



## 2021 YILINDA PARASAL GENİŞLEME + DESTEKLER + ÇOK DÜŞÜK FAİZLER SÜRECEK

MERKEZ BANKALARI BİLANÇOLARI  
MİLYAR DOLAR, EURO, YEN

## ABD MERKEZ BANKASI FAİZ YÜZDE



|         |                                      |
|---------|--------------------------------------|
| ABD     | 1,9 TRİLYON DOLAR YENİ DESTEK PAKETİ |
| AB      | 750 MİLYAR EURO DESTEK PAKETİ        |
| JAPONYA | 707 MİLYAR DOLAR                     |



# KÜRESEL FİNANSAL PİYASALARDA ARTÇI ETKİLER, YÜKSEK OYNAKLIK YAŞANIYOR



**DOLARDA İSTİKRAR; DOLAR ENDEKSİ; 1973=100;**

## EURO DOLAR PARİTESİ NEREYE; ORTA VADEDE 1,20-1,25 ARALIĞI



# BREXIT SONRASI POUND GELİŞMELERİ



## GELİŞEN ÜLKELER İÇİN UYGUN KÜRESEL FİNANSAL KOŞULLAR

**Weak-Dollar Bets****Emerging-market currencies reach record high**

■ MSCI Emerging Markets Currency Index



Source: Bloomberg

## PAMUK FİYATLARI DA YUKARI YÖNLÜ



Cotton futures soared to above 83 cents a bushel, a level not seen since September 2018, as poor weather in the US and other key growing regions reduced expectations for the current crop with the USDA forecasting the smallest domestic crop in five years. The world's supply has been disrupted since December, when the Trump administration banned cotton imports from the Xinjiang Production and Construction Corps saying it uses the forced labor of detained Uighur Muslims. Further supporting prices was optimism over coronavirus vaccine rollout that bolstered hopes for a swifter economic recovery and brightened the outlook for cotton demand. Cotton gained more than 10% in 2020.

# 2021 YILINDA AŞILAMA GELİŞMELERİ VE BEKLENTİLER



## DÜMNYA EKONOMİSİ VE TİCARETİ İÇİN AŞILAMA SENARYOLARI

İYİMSER  
SENARYO

AŞILAMA TAKVİME UYGUN YAPILIR  
AŞI YAYGIN OLARAK UYGULANIR  
AŞI BAĞIŞIKLIK KAZANDIRIR

KÖTÜMSER  
SENARYO

AŞILAMA GECİKİR  
AŞILAMA YAYGIN UYGULANAMAZ  
AŞI BAĞIŞIKLIK KAZANDIRMAZ

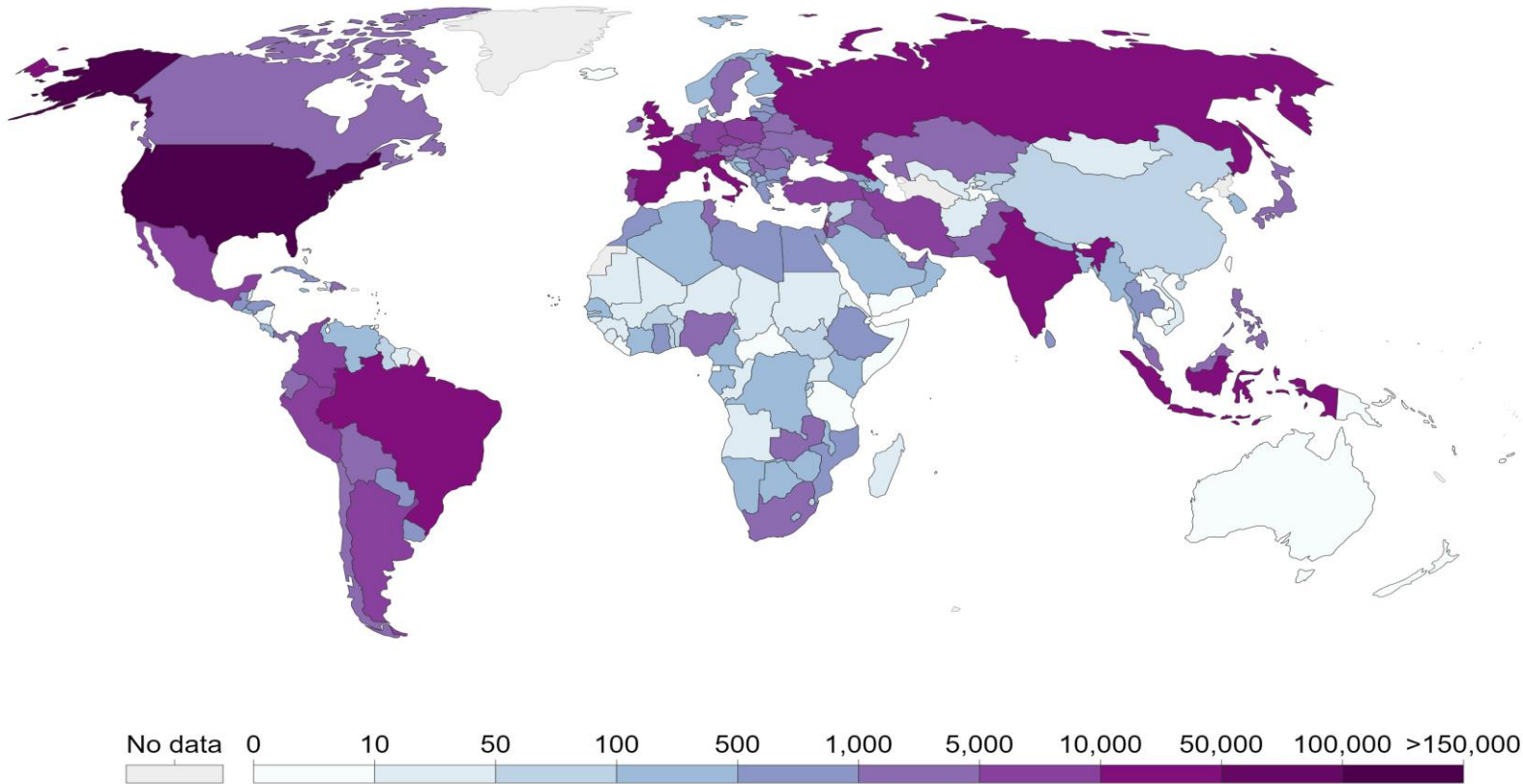


# COVID-19 SALGINI TÜM PAZARLARDA HALNE YÜKSEK GERÇEKLEŞİYOR

## Daily new confirmed COVID-19 cases, Feb 6, 2021

Shown is the rolling 7-day average. The number of confirmed cases is lower than the number of actual cases; the main reason for that is limited testing.

Our World  
in Data



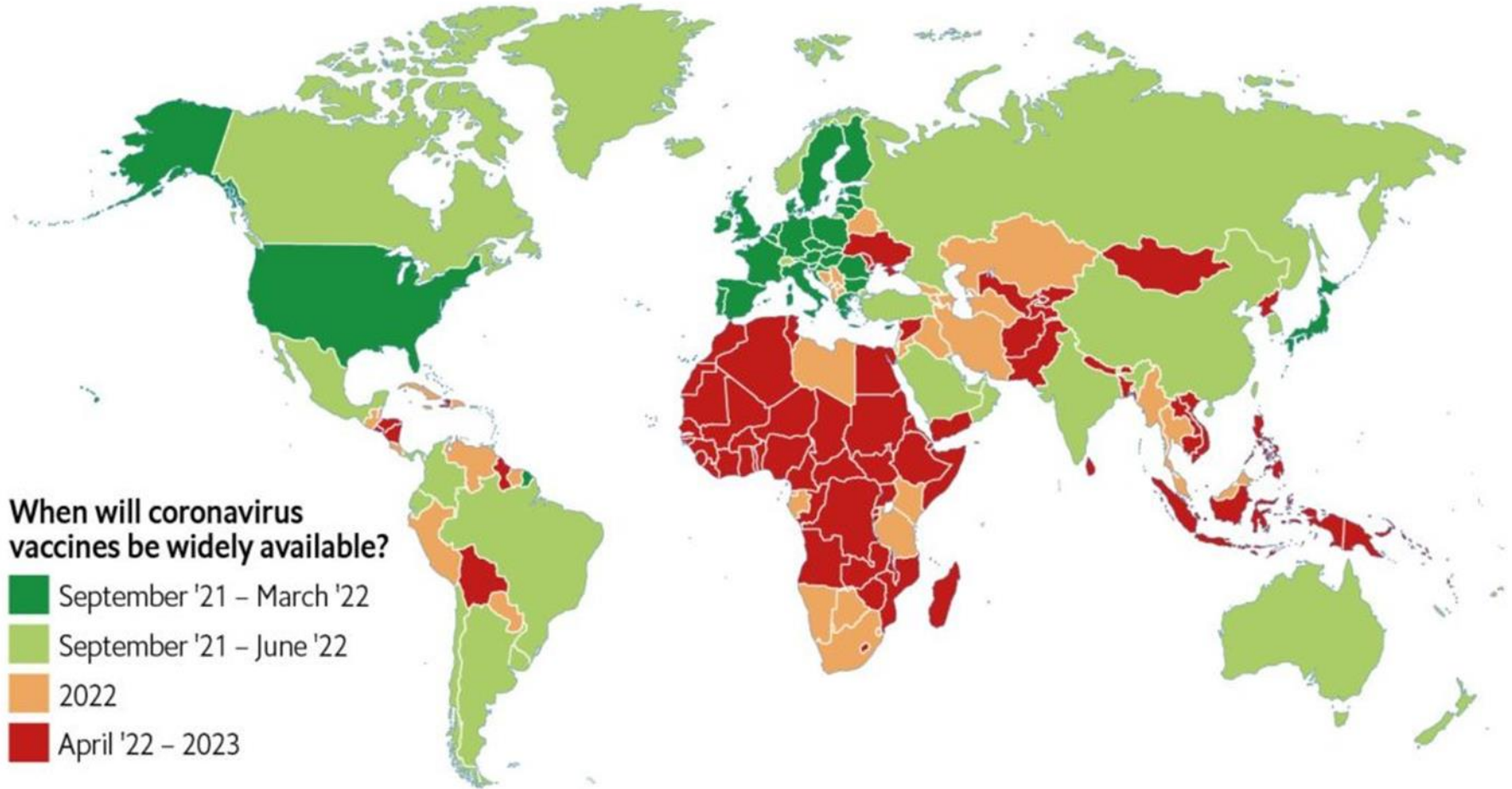
Source: Johns Hopkins University CSSE COVID-19 Data – Last updated 7 February, 09:02 (London time)

CC BY

## AŞILAMA TAKVİMİ İÇİN GÜNCEL ÖNGÖRÜLER

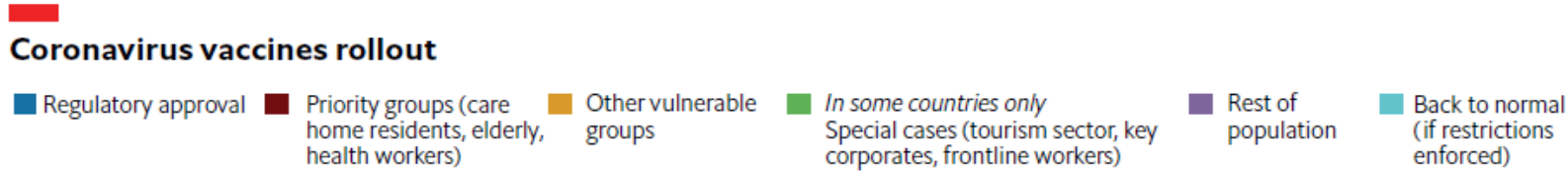


Rich countries will get access to coronavirus vaccines earlier than others



Source: The Economist Intelligence Unit.

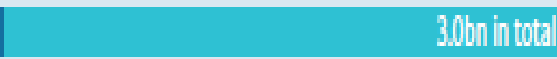









# AŞILAMA TAKVİMİ İÇİN GÜNCEL ÖNGÖRÜLER; 3 YILA YAYILABİLİR



Accurate as at January 22nd, 2021  
Source: The Economist Intelligence Unit.

## 2021 YILI İÇİN YETERLİ AŞI ÜRETİMİNE ULAŞILMAYA ÇALIŞILIYOR

Covid-19 vaccines, to January 6th 2021 Approved by: ● Stringent regulators ● Other regulators

| Producer                        | Name                 | Type            | Price per dose, \$* | Doses delivered in 2020 and promised for 2021*  | Approved in                   |
|---------------------------------|----------------------|-----------------|---------------------|---|-------------------------------|
| ● AstraZeneca-Oxford University | AZD1222 <sup>†</sup> | Viral vector    | 1.50-4              |  3.0bn in total | Britain, India and 3 others   |
| Novavax                         | NVX-CoV2373          | Protein subunit | 16                  |  2.1bn          | -                             |
| ● Pfizer-BioNTech               | tozinameran          | mRNA            | 19.50               |  1.4bn          | Britain, EU, US and 21 others |
| ● Sinopharm                     | BBIBP-CoV            | Inactivated     | <77                 |  1.3bn          | Bahrain, China, Egypt, UAE    |
| ● Gamaleya Centre               | Sputnik V            | Viral vector    | <10                 |  1.0bn          | Argentina, Belarus, Russia    |
| Johnson & Johnson               | JNJ-78436735         | Viral vector    | 10                  |  1.0bn          | -                             |
| ● Sinovac Biotech               | CoronaVac            | Inactivated     | 14                  |  900m           | China                         |
| ● Moderna                       | mRNA-1273            | mRNA            | 32-37               |  770m           | Canada, EU, Israel, US        |
| ● Bharat Biotech-ICMR           | Covaxin              | Inactivated     | 1                   |  720m          | India                         |
| CureVac                         | CVnCoV               | mRNA            | 12.30               |  300m          | -                             |

Sources: Regulatory Affairs Professionals Society; The Economist Intelligence Unit; Morgan Stanley; press reports; government websites; company websites.

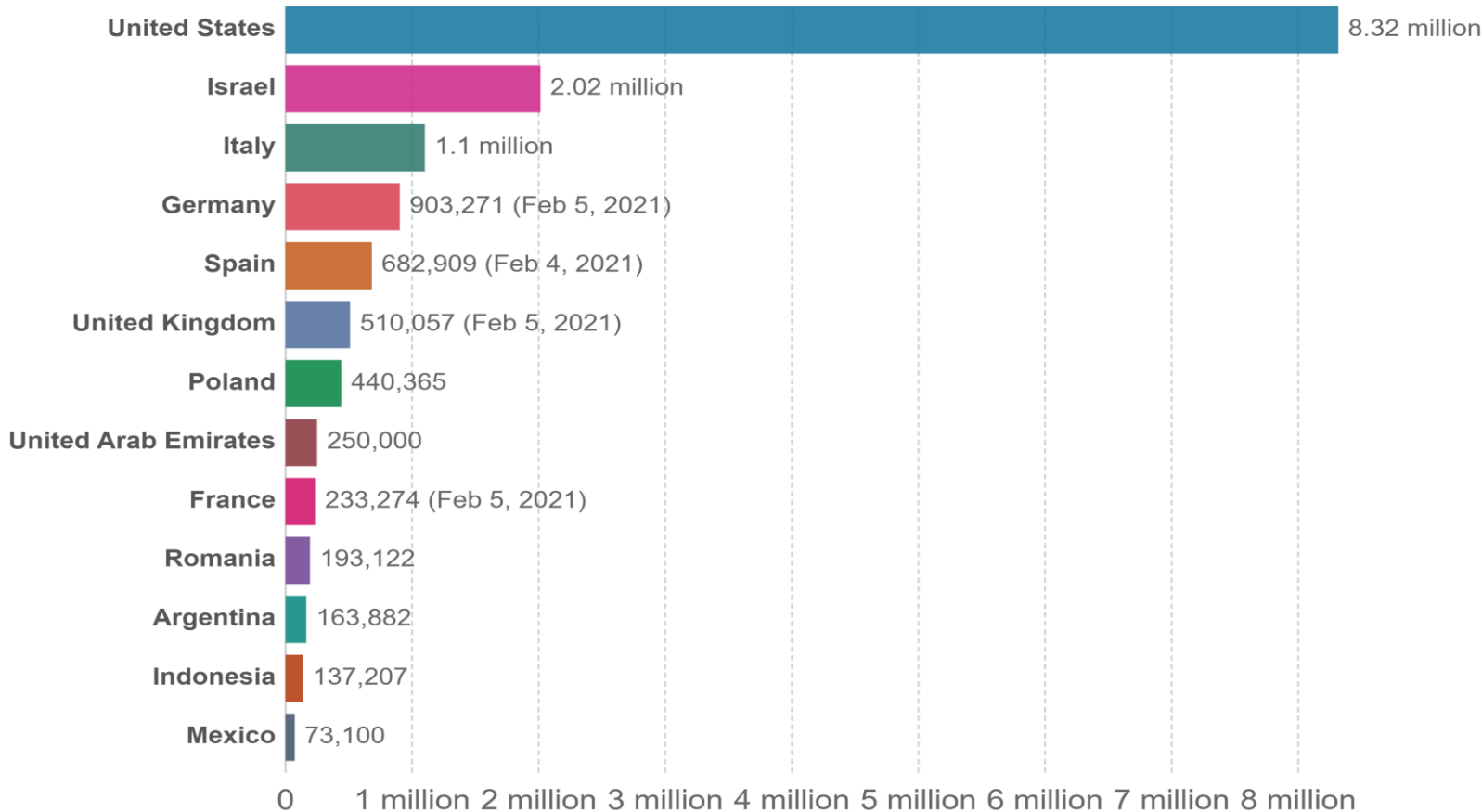
\*Estimate †Covishield in India

## AŞI DURUMU

### Number of people fully vaccinated against COVID-19, Feb 6, 2021

Our World  
in Data

Total number of people who received all doses prescribed by the vaccination protocol. This data is only available for countries which report the breakdown of doses administered by first and second doses.



Source: Official data collated by Our World in Data – Last updated 7 February, 10:40 (London time)

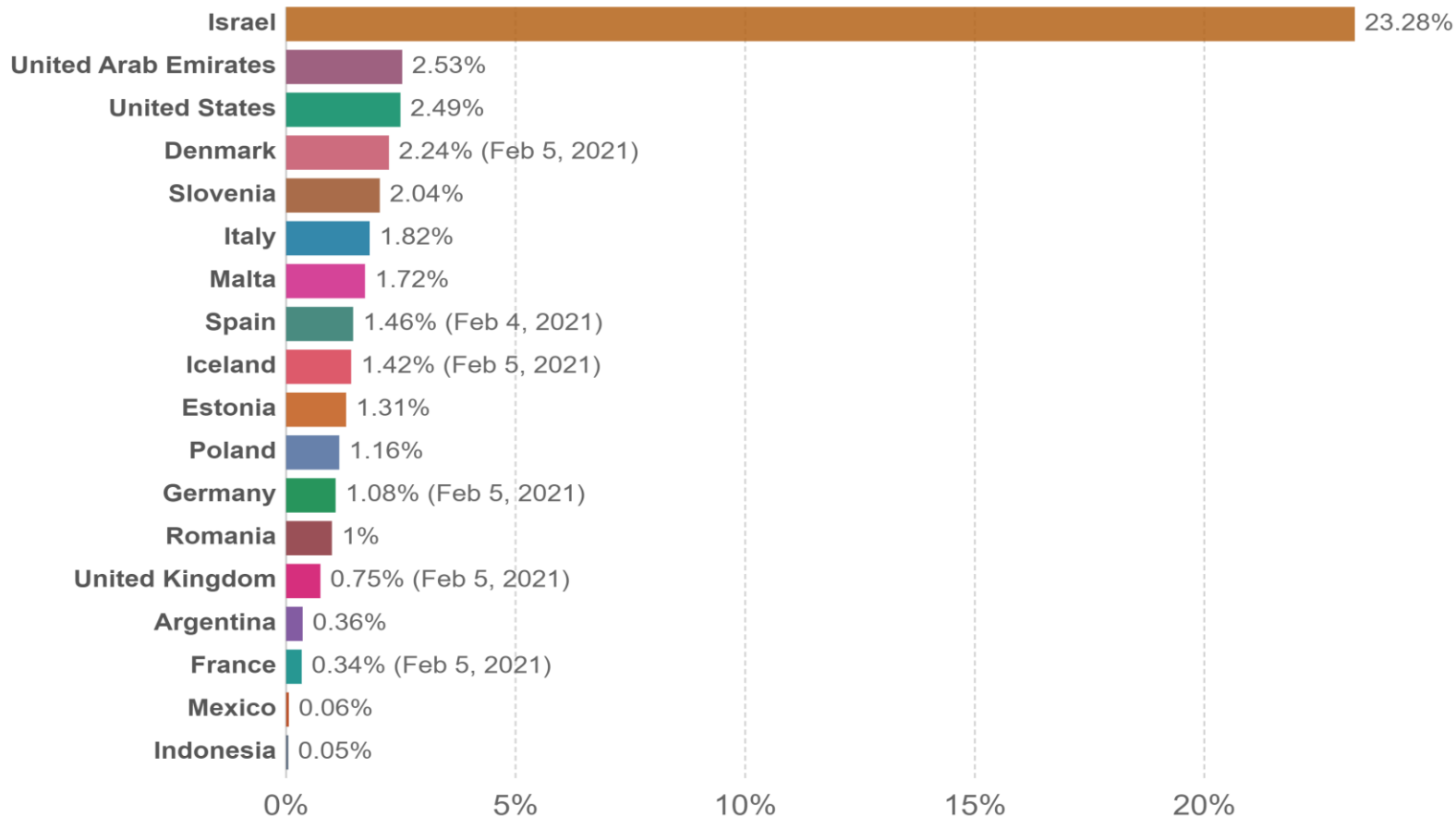
OurWorldInData.org/coronavirus • CC BY

## AŞI DURUMU

## Share of the population fully vaccinated against COVID-19, Feb 6, 2021

Our World  
in Data

Share of the total population that have received all doses prescribed by the vaccination protocol. This data is only available for countries which report the breakdown of doses administered by first and second doses.



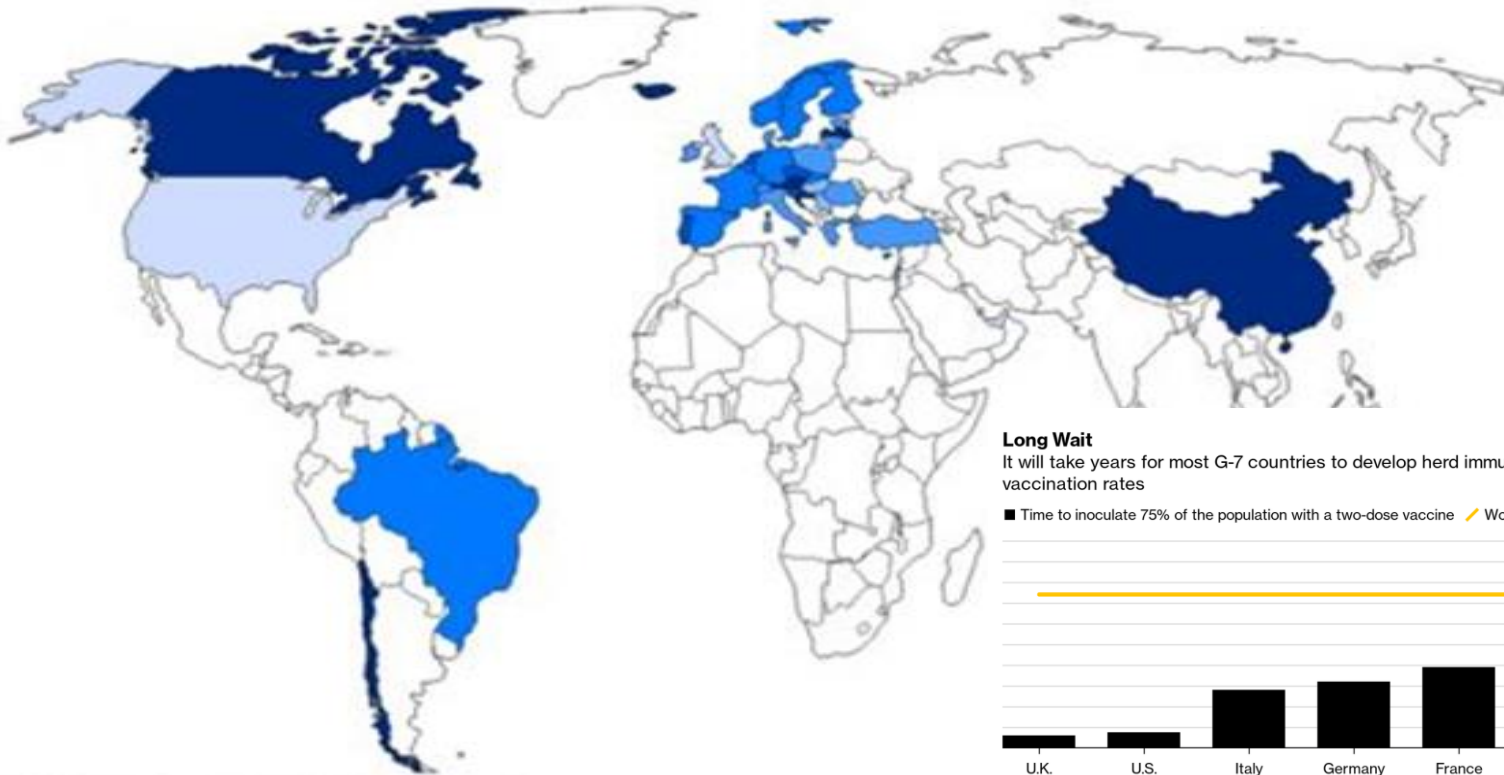
Source: Official data collated by Our World in Data – Last updated 7 February, 10:40 (London time)

OurWorldInData.org/coronavirus • CC BY

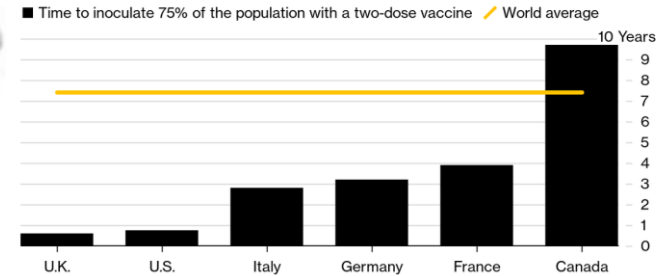
## MEVCUT AŞILAMA HIZI İLE GİDİLİRSE AŞILAMA 7 YIL SÜRECEK

## Path to Immunity

Years to inoculate 75% of the population with a two-dose vaccine at the current pace of shots given

**Long Wait**

It will take years for most G-7 countries to develop herd immunity at current vaccination rates

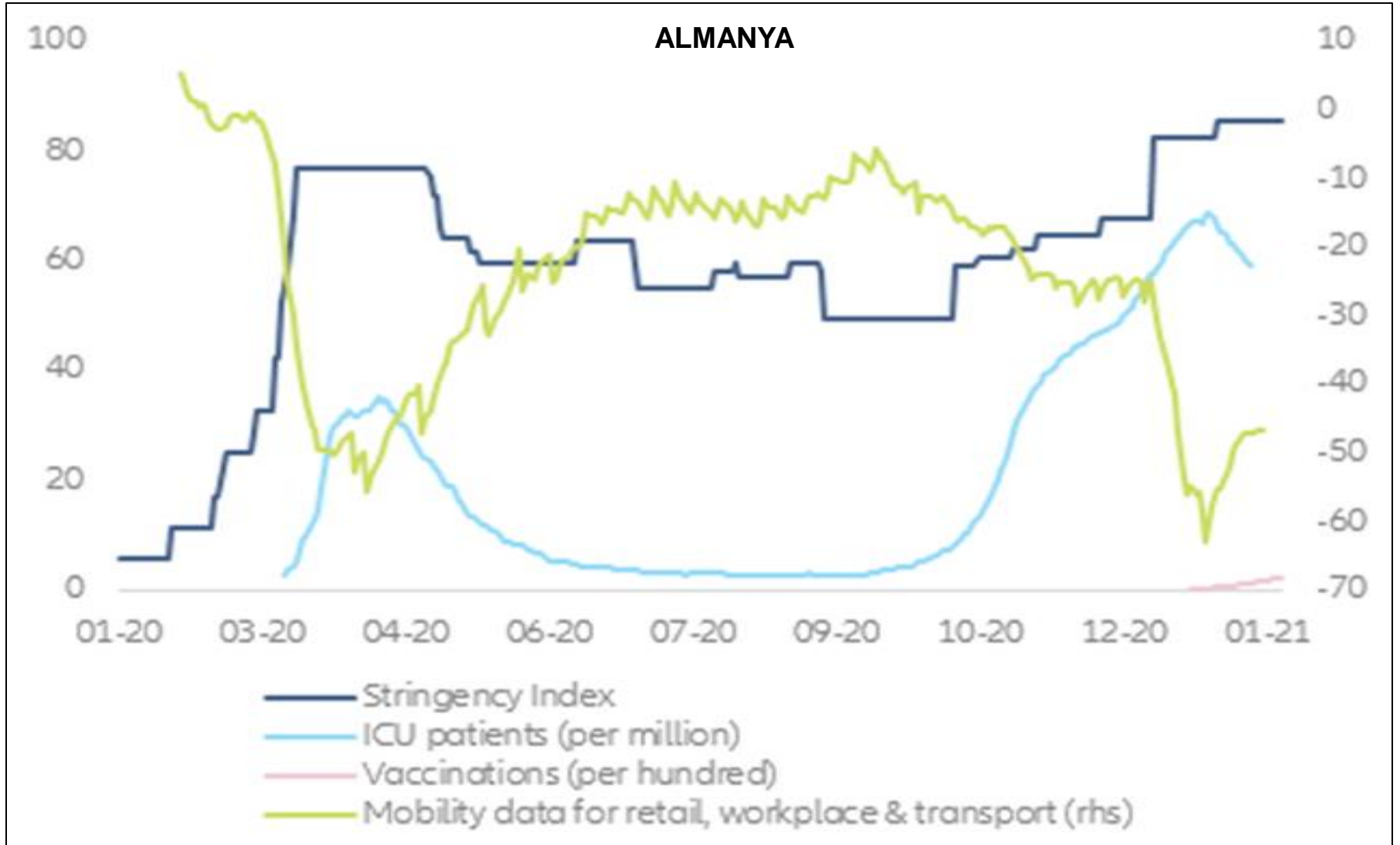


Source: Bloomberg's Covid-19 Vaccine Tracker

Source: Bloomberg's Covid-19 Vaccine Tracker  
Note: Herd immunity forecast at 70%-85% vaccination level

Bloomberg

## AŞILAMADA GECİKME EN ÇOK PERAKENDE SEKTÖRÜNÜ OLUMSUZ ETKİLEYECEK





## DÜNYA'DA HANGİ SENARYOYA YAKINIZ?

**İYİMSER SENARYO**

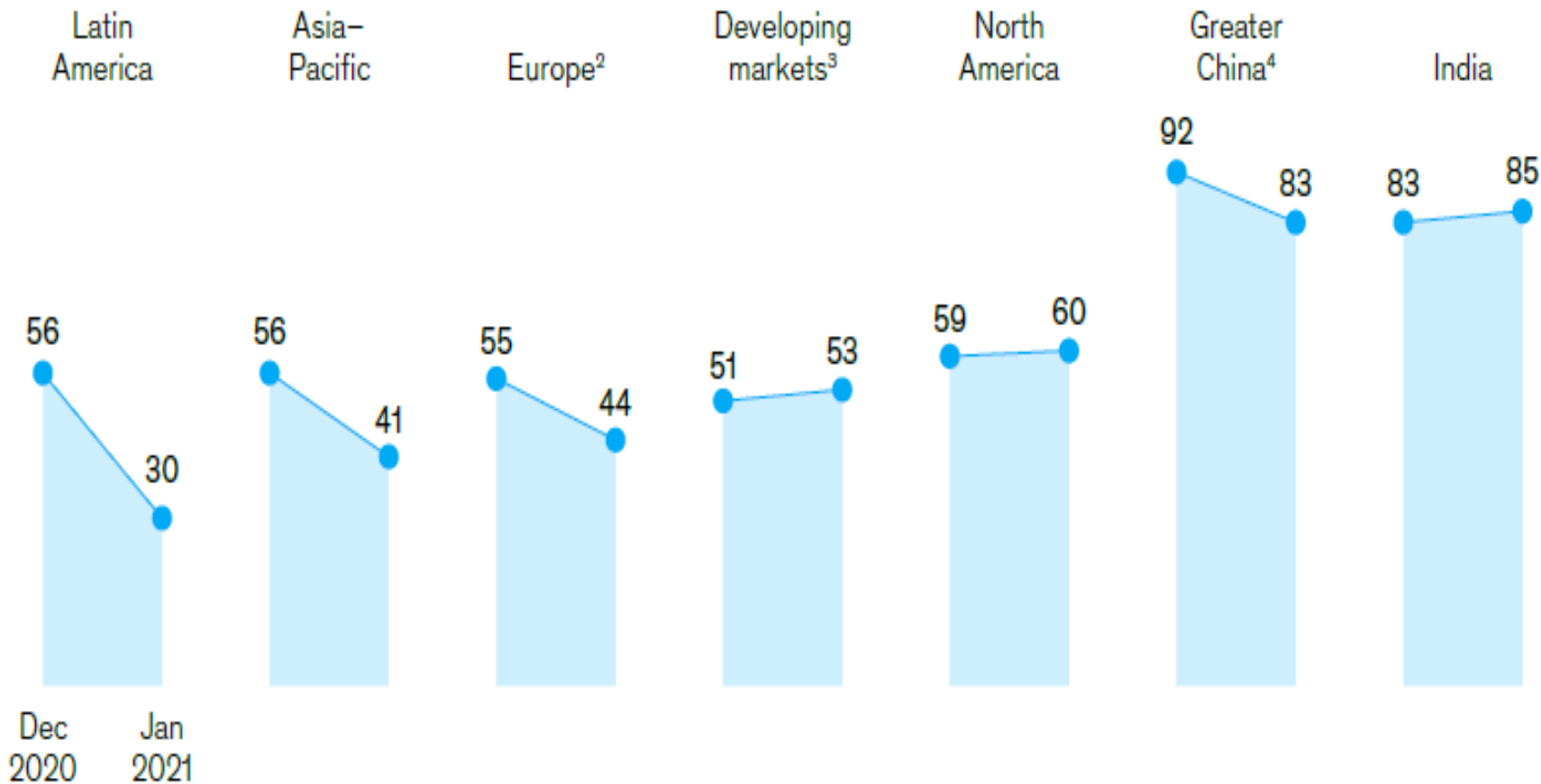
- 7 AŞI ONAY ALDI
- 55 ÜLKEDE AŞILAMA BAŞLADI
- EKONOMİLERE YENİ DESTEK PAKETLERİ GELİYOR

- SALGINDA MUTASYONLAR
- KAPATMA ÖNLEMLERİ
- KISITLAMALARIN YAZ'A KADAR SÜRME OLASILIĞI
- AŞILAMADA YAVAŞ SEYİR+BAĞIŞIKLIK?
- TOPLUMSAL TEPKİLER

**KÖTÜMSER SENARYO**

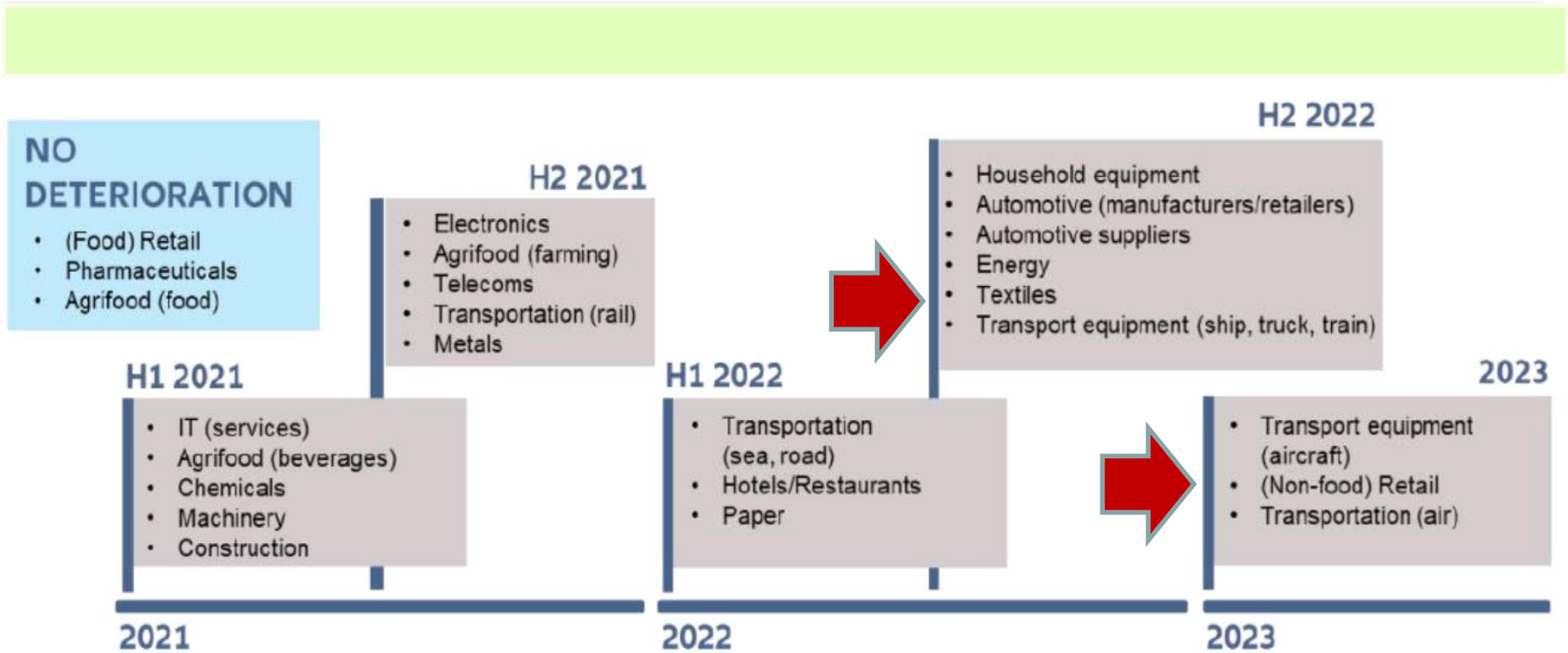
## MC KINSEY BEKLENTİLER ANKETİ 2021 OCAK

% of respondents expecting improved economic conditions in their countries, next 6 months,<sup>1</sup> region by office



# 2021 YILI DÜNYA HAZIR GİYİM SEKTÖRÜ GELİŞMELER VE BEKLENTİLER

## İYİMSER AŞILAMA SENARYOSU İÇİNDE SEKTÖRLERDE TOPARLANMA BEKLENTİSİ



**2021-22:  
VACCINE  
ECONOMICS**

Allianz Research

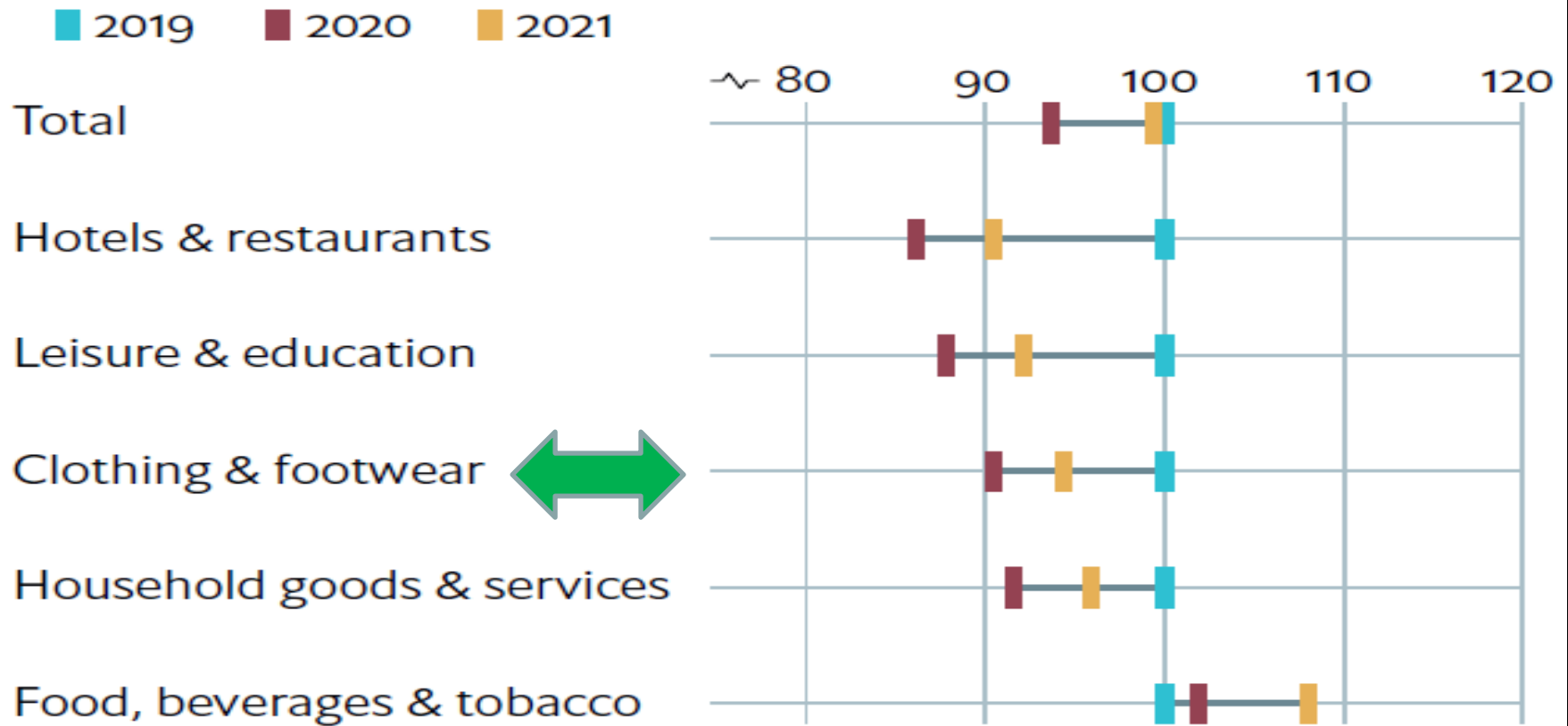
18 December 2020



EULER HERMES

## TÜKETİCİ HARCAMALARINDA TOPARLANMA BEKLENTİLERİ

(global consumer spending; US\$ m; 2019=100)

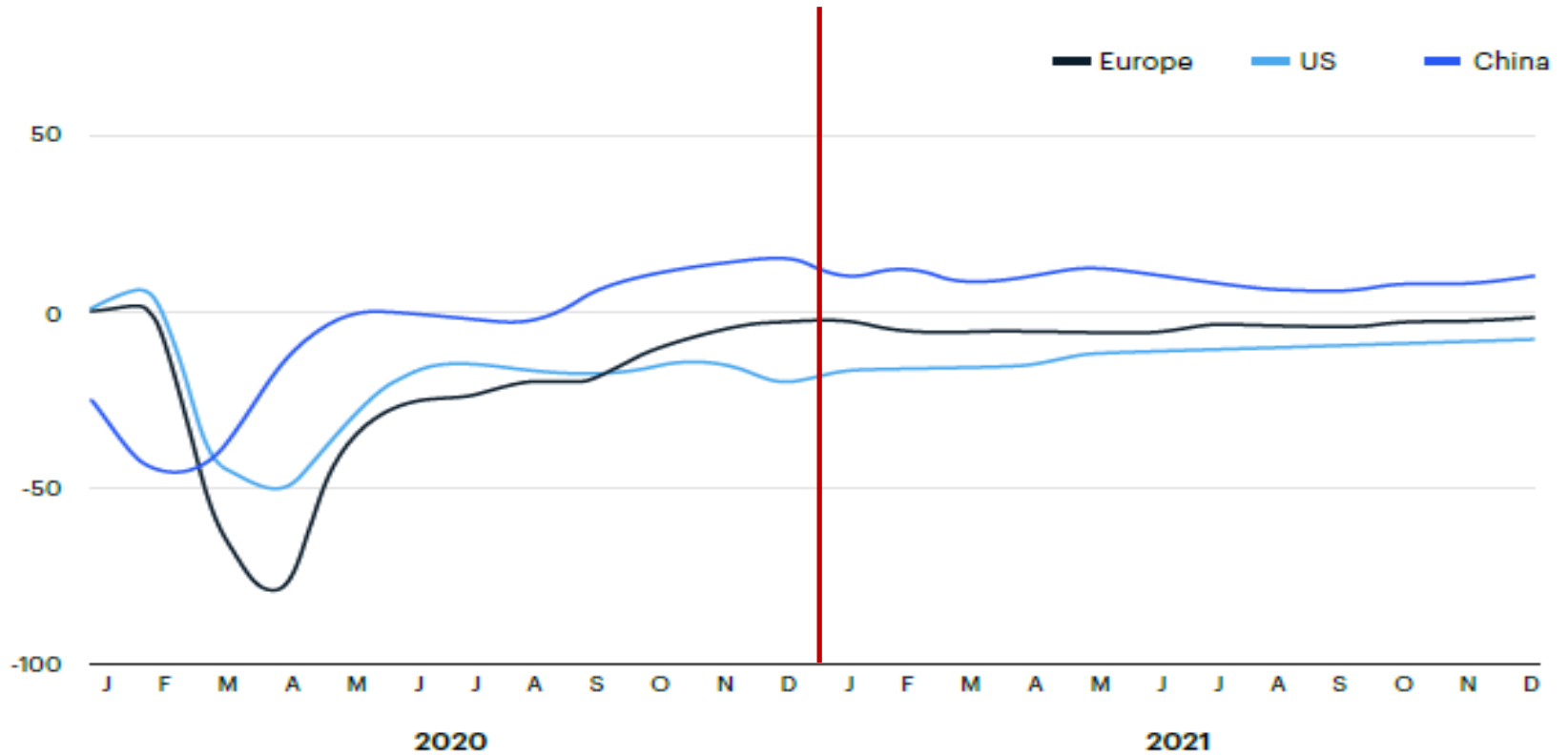


## DÜNYA HAZIR GİYİM SEKTÖRÜNDE 2021 YILI BEKLENTİLERİ



### Fashion sales in China are expected to recover in 2020, while recovery in the US and Europe lags

FASHION SALES IN THE EARLIER RECOVERY SCENARIO, COMPARED TO 2019, %

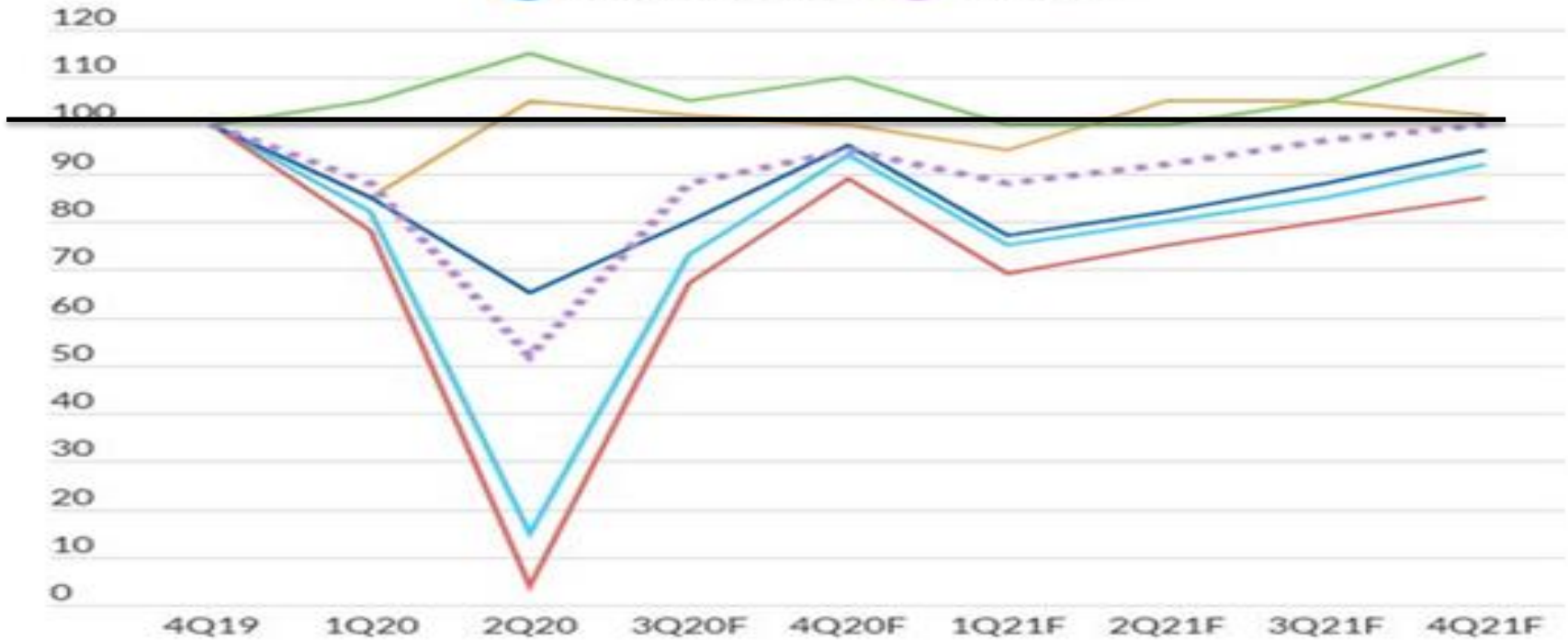


## AVRUPA BİRLİĞİ'NDE HAZIR GİYİM PERAKENDESİ GECİKMELİ TOPARLANACAK

## European Non-Food Retail Sales

100 = 4Q19

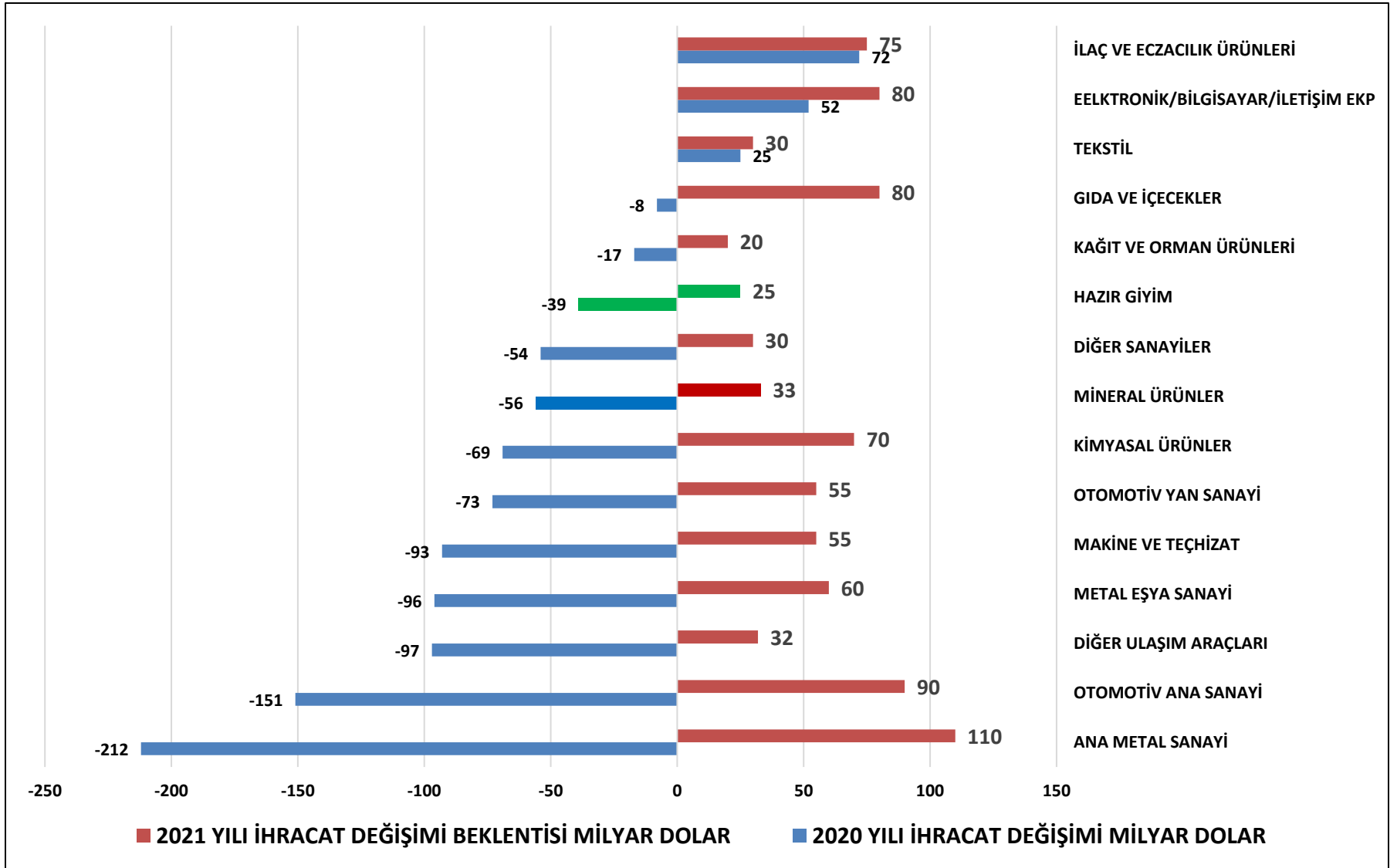
● Department stores
 ● Apparel
 ● Home improvement
 ● Online marketplaces  
● Fuel distribution\*
 ● All retail



\*Gross profits are used as a proxy for sales

Source: Fitch Ratings

## DÜNYA SANAYİ MALİ TİCARETİNDE SEKTÖREL BEKLENTİLER 2021

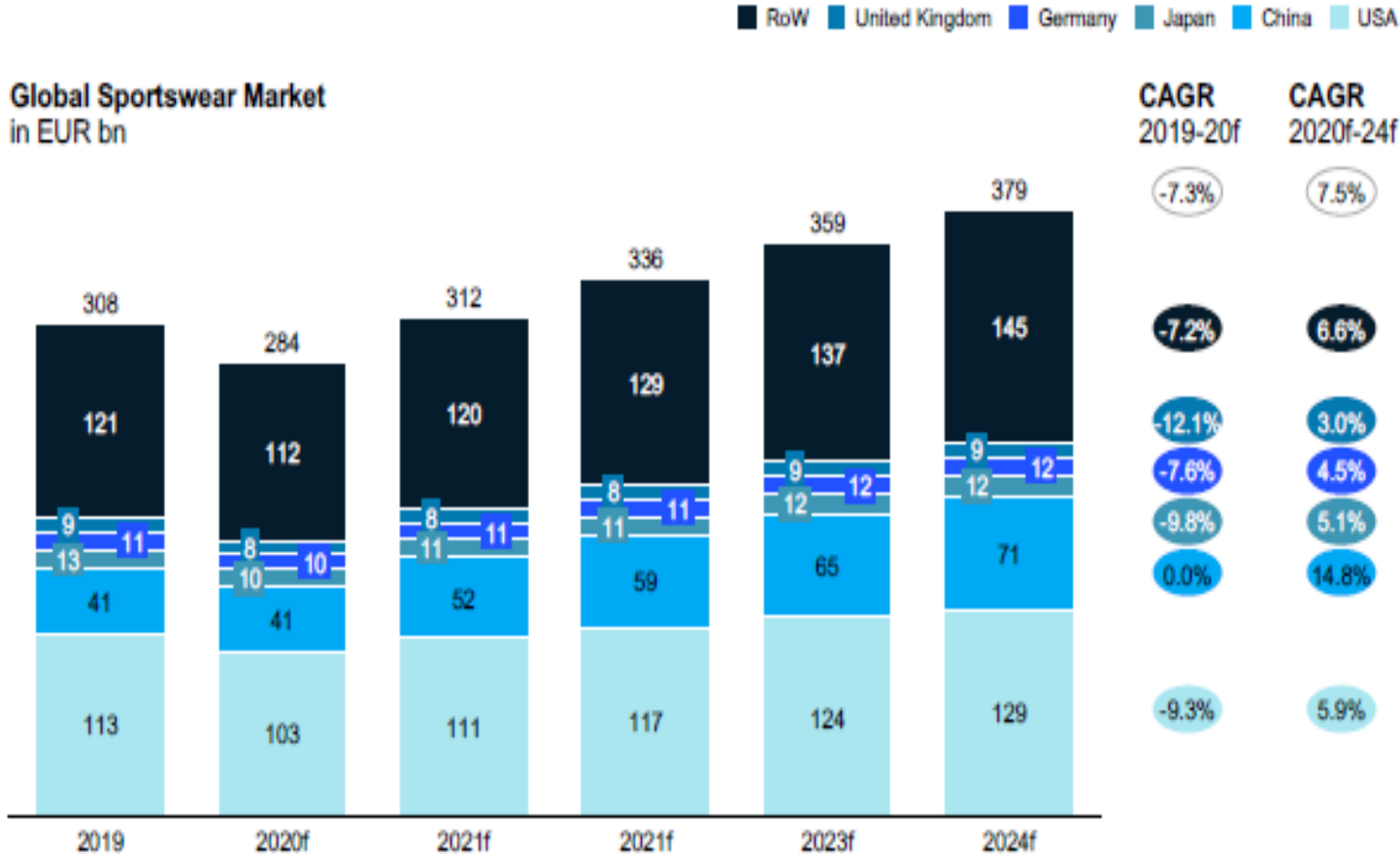




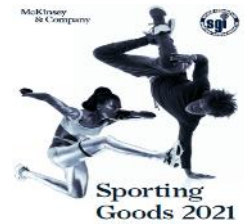
## SPOR ÜRÜNLERİ PAZARI EN HIZLI BÜYÜYECEK ALAN OLACAK

Exhibit 6

COVID-19 had a profound negative impact on the global sportswear market, China continues to take share and will be the growth engine going forward



Source: Euromonitor International

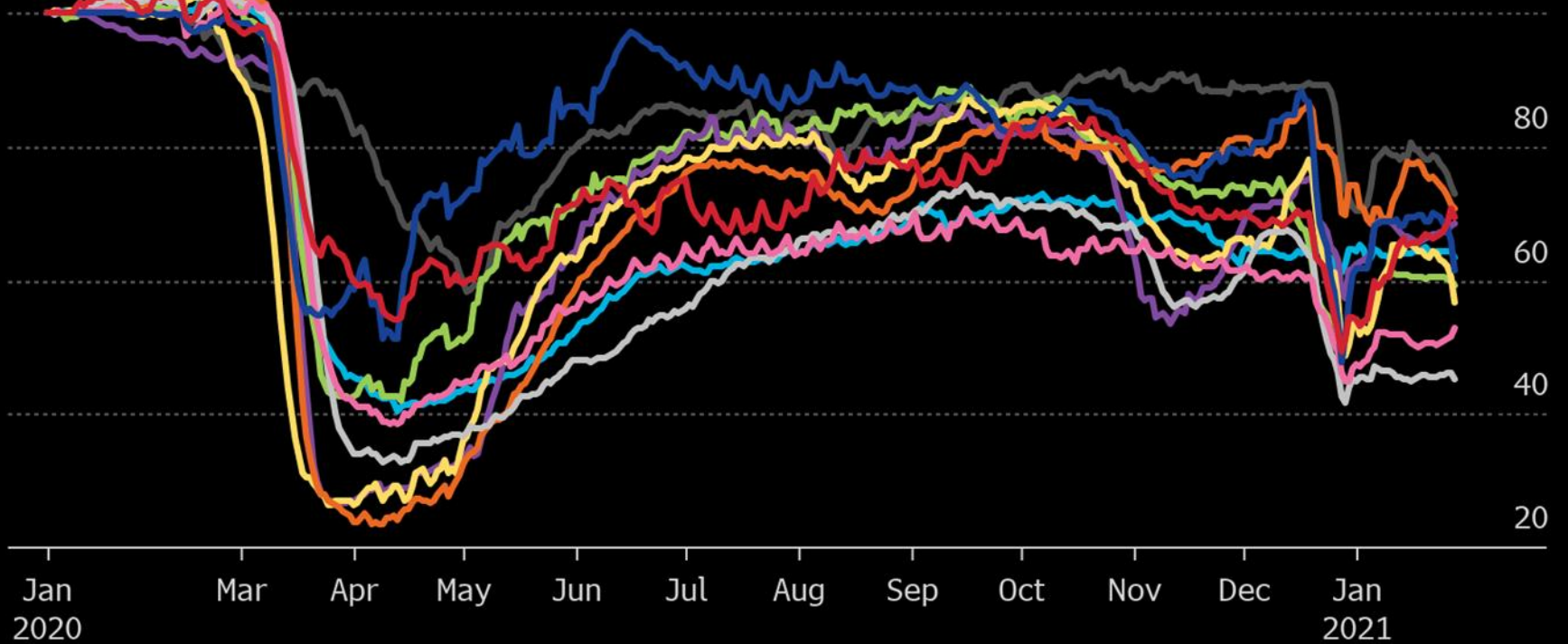


## KÜRESEL HAREKETLİLİK ZAYIF SEYREDİYOR

**Economic Slump**

Activity in advanced economies is off to a very slow start of the year

U.S. Japan Germany France Italy Spain U.K. Canada Norway Sweden  
100 Index level

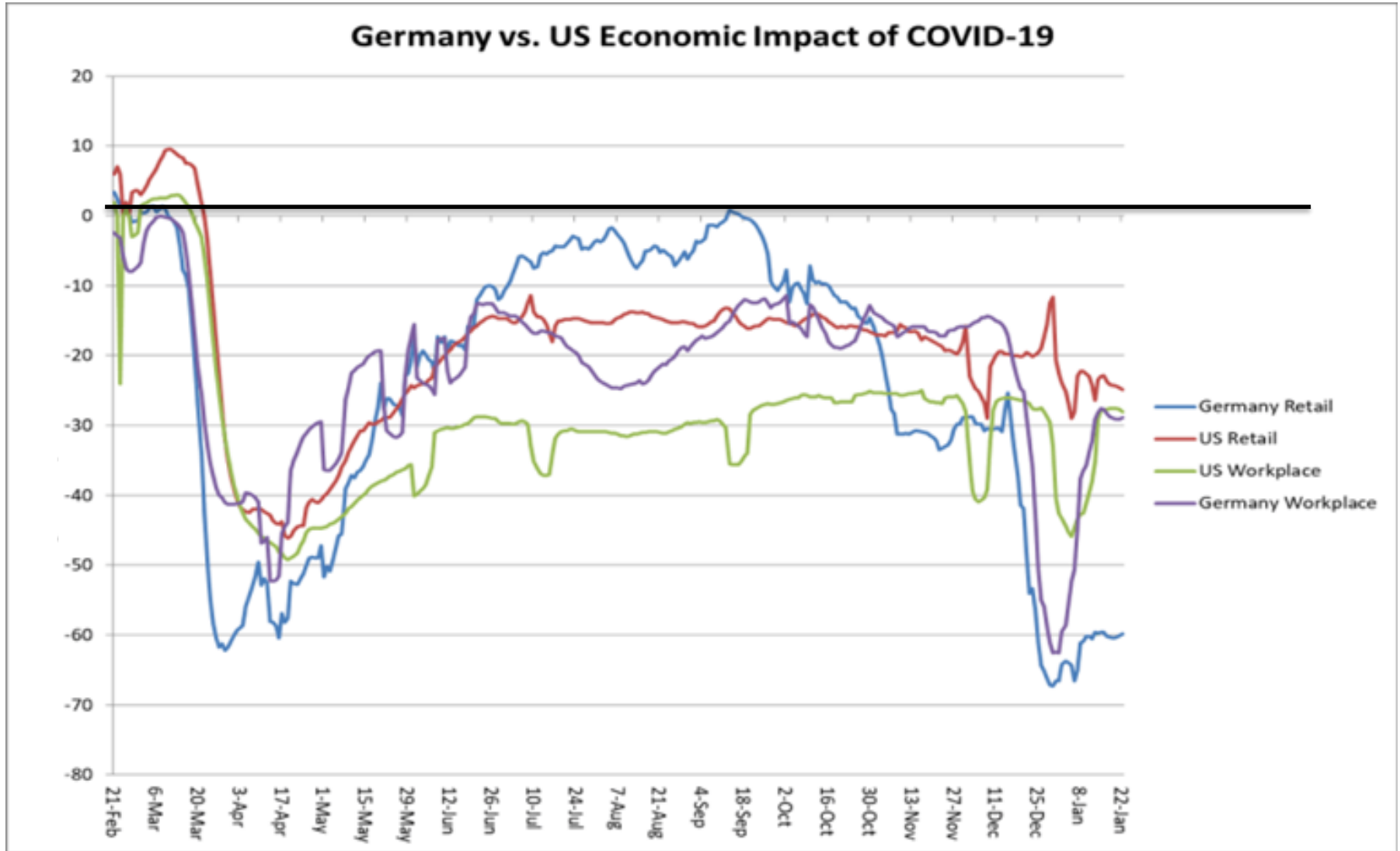


Source: Bloomberg Economics, Google, Moovitapp.com, German Statistical Office, BloombergNEF, Indeed.com, Shoppertrak.com, Opportunity Insights

Note: Jan. 8, 2020 = 100

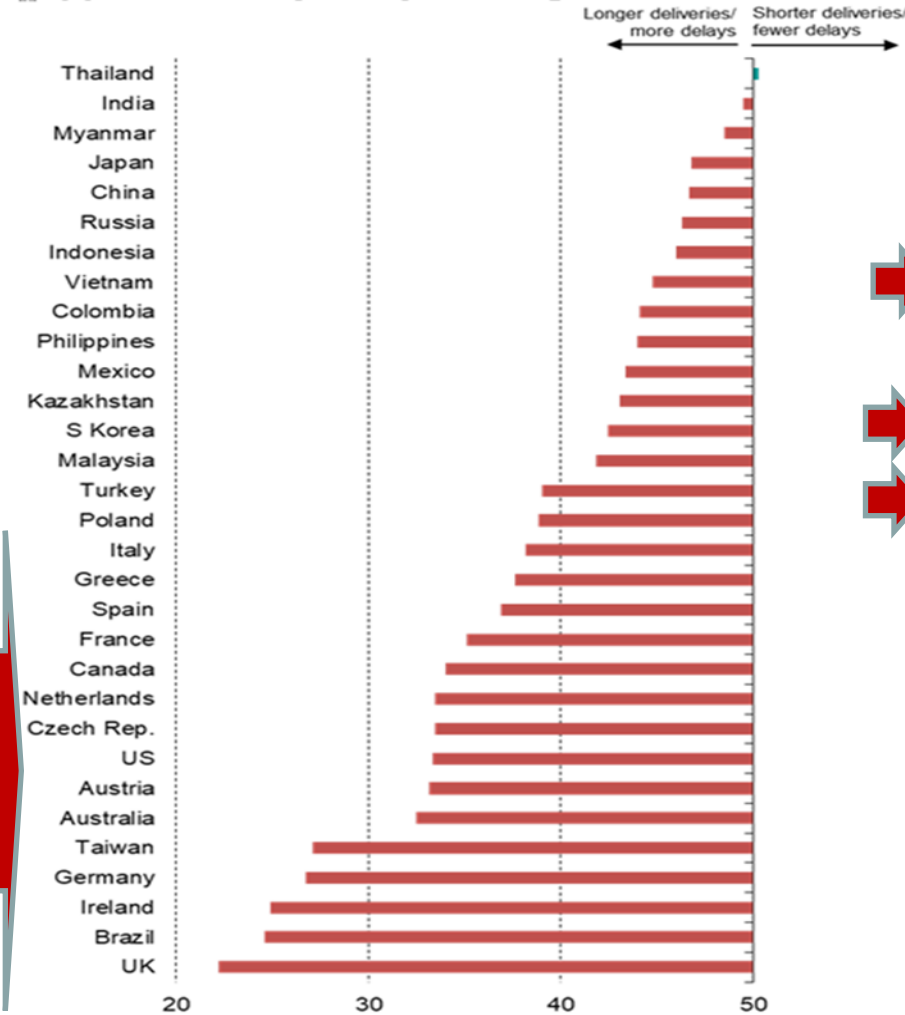
**Bloomberg**

## PERAKENDE HARCAMALARINDA GELİŞMELER



## TEDARİKTE GECİKMELELER VE YÜKSEK NAVLUN FİYATLARI TÜRKİYE İÇİN AVANTAJ

## Supplier delivery delay rankings









| Route                  | 21-Jan-21 | 28-Jan-21 | 04-Feb-21 | Weekly change (%) | Annual change (%) |
|------------------------|-----------|-----------|-----------|-------------------|-------------------|
| Composite Index        | \$5,340   | \$5,252   | \$5,229   | 0%                | 202% ▲            |
| Shanghai - Rotterdam   | \$9,066   | \$8,740   | \$8,543   | -2% ▼             | 311% ▲            |
| Rotterdam - Shanghai   | \$1,409   | \$1,409   | \$1,465   | 4% ▲              | 119% ▲            |
| Shanghai - Genoa       | \$8,792   | \$8,736   | \$8,828   | 1% ▲              | 229% ▲            |
| Shanghai - Los Angeles | \$4,178   | \$4,178   | \$4,191   | 0%                | 165% ▲            |
| Los Angeles - Shanghai | \$530     | \$530     | \$530     | 0%                | 18% ▲             |
| Shanghai - New York    | \$6,517   | \$6,517   | \$6,540   | 0%                | 128% ▲            |
| New York - Rotterdam   | \$646     | \$646     | \$743     | 15% ▲             | 40% ▲             |
| Rotterdam - New York   | \$2,283   | \$2,283   | \$2,254   | -1% ▼             | -4% ▼             |

Sources: IHS Markit, JPMorgan, CBA, ISO, CIPS, au Jibun Bank, NEVI, BME, Bank Austria, AIB, AERCE, Caixin, HPI, Istanbul Chamber of Industry, Tengri Partners.

## TÜRKİYE AVRUPA İÇİN EN AVANTAJLI ÜLKE

## Savings on freight and duties make nearshore alternatives cheaper than China

2016/2017's process and import duties, Jeans example

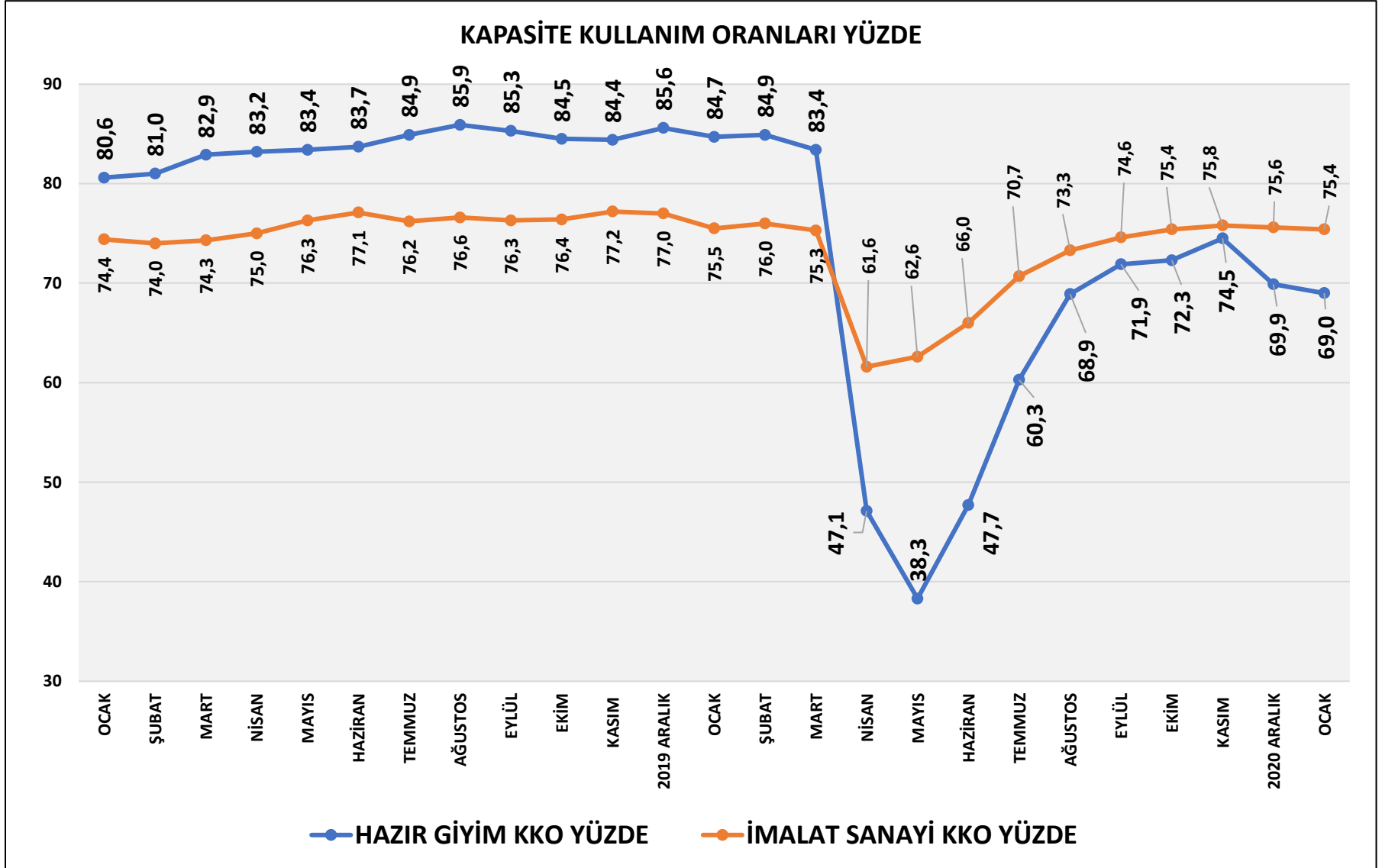
|           | Shoring location | Freight model/days  | Landed cost price <sup>2</sup><br>USD per pair of jeans | ΔChina<br>(base case) |
|-----------|------------------|---|---|-----------------------|
| Offshore  | Bangladesh       |  30    | 10.68   | -11%                  |
|           | China            |  30    | 12.04   | 0%                    |
| Nearshore | Mexico           |  2     | 10.57   | -12%                  |
| Onshore   | USA              | n.a.  | 14.05   | +17%                  |
| Offshore  | Bangladesh       |  30    | 9.94  | -20%                  |
|           | China            |  30   | 12.46   | 0%                    |
| Nearshore | Turkey           |  3-6 | 12.08   | -3%                   |
| Onshore   | Germany          | n.a.  | 30.36   | +144%                 |

Cheapest option

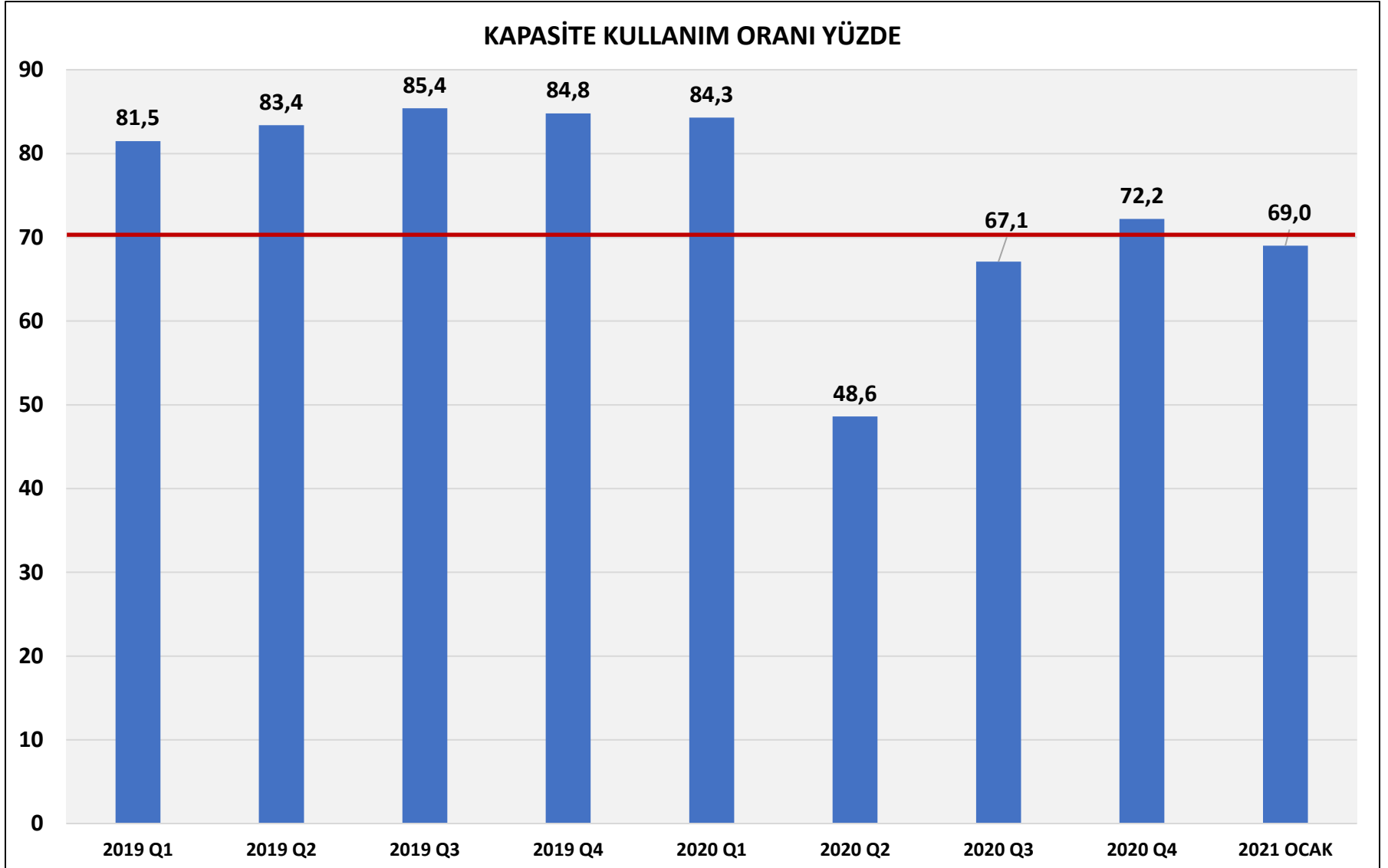


# **TÜRKİYE HAZIR GİYİM SEKTÖRÜ 2021 YILI GELİŞMELERİ**

## 2021 OCAK AYINDA KAPASİTE KULLANIM ORANI YÜZDE 69,0



## KAPASİTE KULLANIM ORANINDA YÜZDE 70 ÖNEMLİ

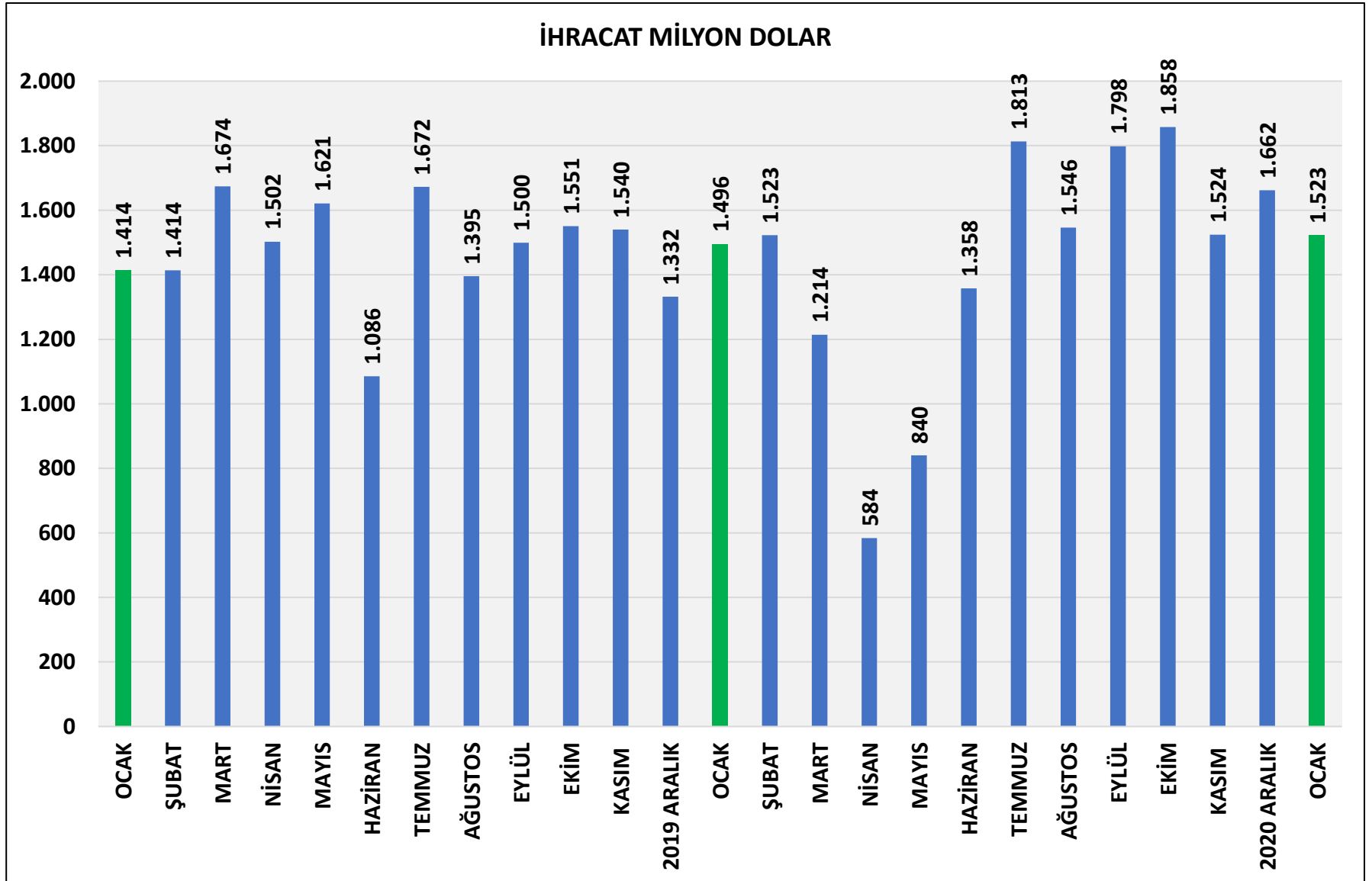




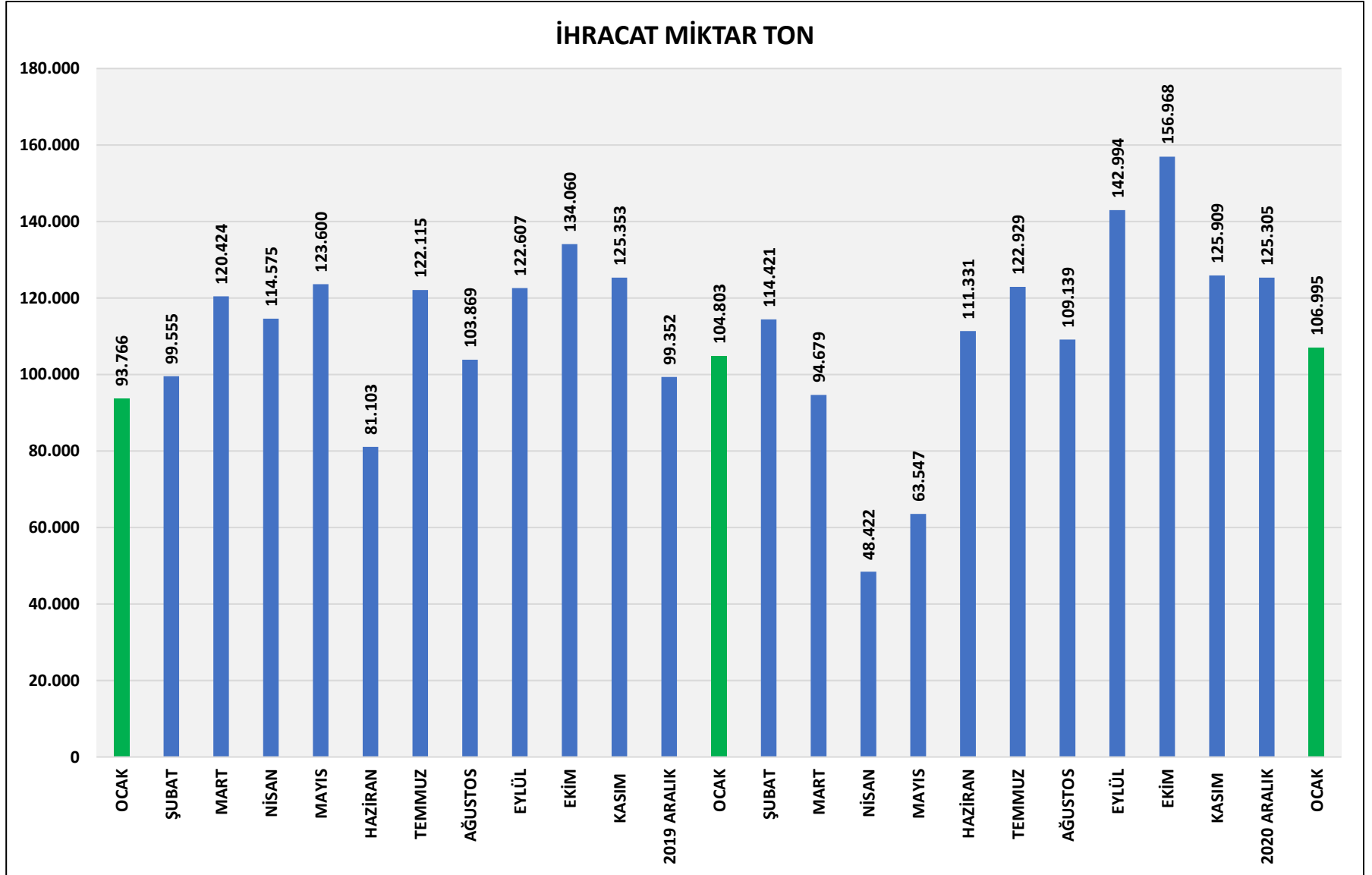
## İHRACAT ARTIŞI OCAK AYINDA YAVAŞLADI

| SEKTÖRLER   | 2020 OCAK<br>MİLYON DOLAR | 2021 OCAK<br>MİLYON DOLAR | Değişim<br>('20/'19) |
|---|---------------------------|---------------------------|----------------------|
| <b>I. TARIM</b>   | 2.043                     | 2.064                     | 1,0                  |
| <b>II. SANAYİ</b>   | 11.103                    | 11.17                     | 0,1                  |
| Tekstil ve Hammaddeleri   | 673                       | 732                       | 8,7                  |
| Deri ve Deri Mamulleri  | 133                       | 110                       | -16,9                |
| Halı  | 221                       | 236                       | 6,4                  |
| Kimyevi Maddeler ve Mamulleri   | 1.680                     | 1.648                     | -1,9                 |
| <b>Hazır giyim ve Konfeksiyon</b>   | <b>1.490</b>              | <b>1.523</b>              | <b>2,2</b>           |
| Otomotiv Endüstrisi   | 2.398                     | 2.267                     | -5,5                 |
| Gemi ve Yat   | 109                       | 43                        | -60,7                |
| Elektrik Elektronik   | 823                       | 897                       | 9,1                  |
| Makine ve Aksamları   | 624                       | 653                       | 4,6                  |
| Demir ve Demir Dışı Metaller  | 702                       | 761                       | 8,3                  |
| Çelik   | 1.136                     | 1.056                     | -7,0                 |
| Çimento Cam Seramik ve Toprak Ürünleri  | 288                       | 279                       | -3,0                 |
| Mücevher  | 292                       | 331                       | 13,4                 |
| Savunma ve Havacılık Sanayii  | 167                       | 173                       | 3,7                  |
| İklimlendirme Sanayii   | 361                       | 401                       | 11,1                 |
| Diğer Sanayi Ürünleri   | 7,0                       | 7.1                       | 2,8                  |
| <b>III. MADENCİLİK</b>  | 329                       | 353                       | 7,4                  |
| <b>T O P L A M (TİM*)</b>   | <b>13.476</b>             | <b>13.534</b>             | <b>0,4</b>           |
| İhracatçı Birlikleri Kaydından Muaf İhracat ile Antrepo ve Serbest Bölgeler Farkı | 1.211                     | 1.514                     | 25,1                 |
| <b>GENEL İHRACAT TOPLAMI</b>  | <b>14.686</b>             | <b>15.048</b>             | <b>2,5</b>           |

## İHRACAT ARTIŞI OCAK AYINDA YAVAŞLADI



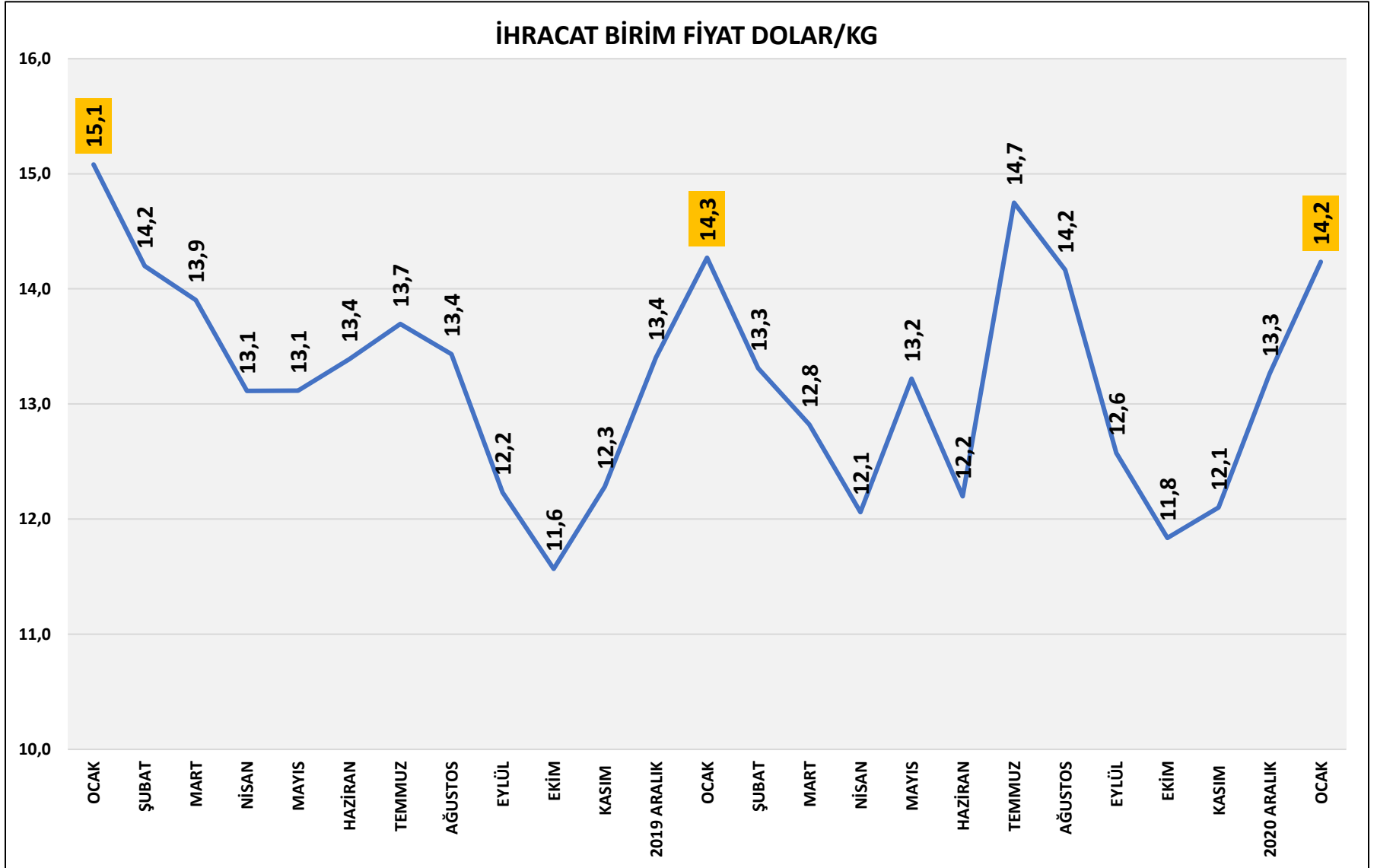
## İHRACATTA MİKTAR OLARAK DÜŞÜŞ



## PARİTE ETKİSİ YENİ YILDA DA POZİTİF

| AYLAR          | 2014        | 2015          | 2016          | 2017          | 2018          | 2019          | 2020          | 2021   |
|----------------|-------------|---------------|---------------|---------------|---------------|---------------|---------------|--------|
| OCAK           | 1.36        | 1,1660        | 1,0866        | 1,0637        | 1,2192        | 1,1421        | 1,1107        | 1,2180 |
| ŞUBAT          | 1.38        | 1,1358        | 1,1109        | 1,0638        | 1,2345        | 1,1348        | 1,0906        |        |
| MART           | 1,38        | 1,0818        | 1,1143        | 1,0688        | 1,2337        | 1,1300        | 1,1063        |        |
| NİSAN          | 1,39        | 1,0814        | 1,1341        | 1,0718        | 1,2274        | 1,1234        | 1,1016        |        |
| MAYIS          | 1.37        | 1,1159        | 1,1300        | 1,1058        | 1,1813        | 1,1184        | 1,0906        |        |
| HAZİRAN        | 1,36        | 1,1229        | 1,1230        | 1,1238        | 1,1673        | 1,1296        | 1,1258        |        |
| TEMMUZ         | 1,35        | 1,1001        | 1,1067        | 1,1532        | 1,1686        | 1,1214        | 1,1538        |        |
| AĞUSTOS        | 1,33        | 1,1147        | 1,1207        | 1,1819        | 1,1548        | 1,1123        | 1,1830        |        |
| EYLÜL          | 1.27        | 1,1234        | 1,1214        | 1,1907        | 1,1661        | 1,1009        | 1,1787        |        |
| EKİM           | 1,25        | 1,1222        | 1,1021        | 1,1755        | 1,1482        | 1,1023        | 1.1767        |        |
| KASIM          | 1,24        | 1,0730        | 1,0800        | 1,1745        | 1,1363        | 1,1048        | 1.2020        |        |
| ARALIK         | 1,23        | 1,0897        | 1,0545        | 1,1838        | 1,1377        | 1,1115        | 1,2173        |        |
| <b>YIL ORT</b> | <b>1,33</b> | <b>1,1106</b> | <b>1,1070</b> | <b>1,1298</b> | <b>1,1813</b> | <b>1,1193</b> | <b>1,1433</b> |        |

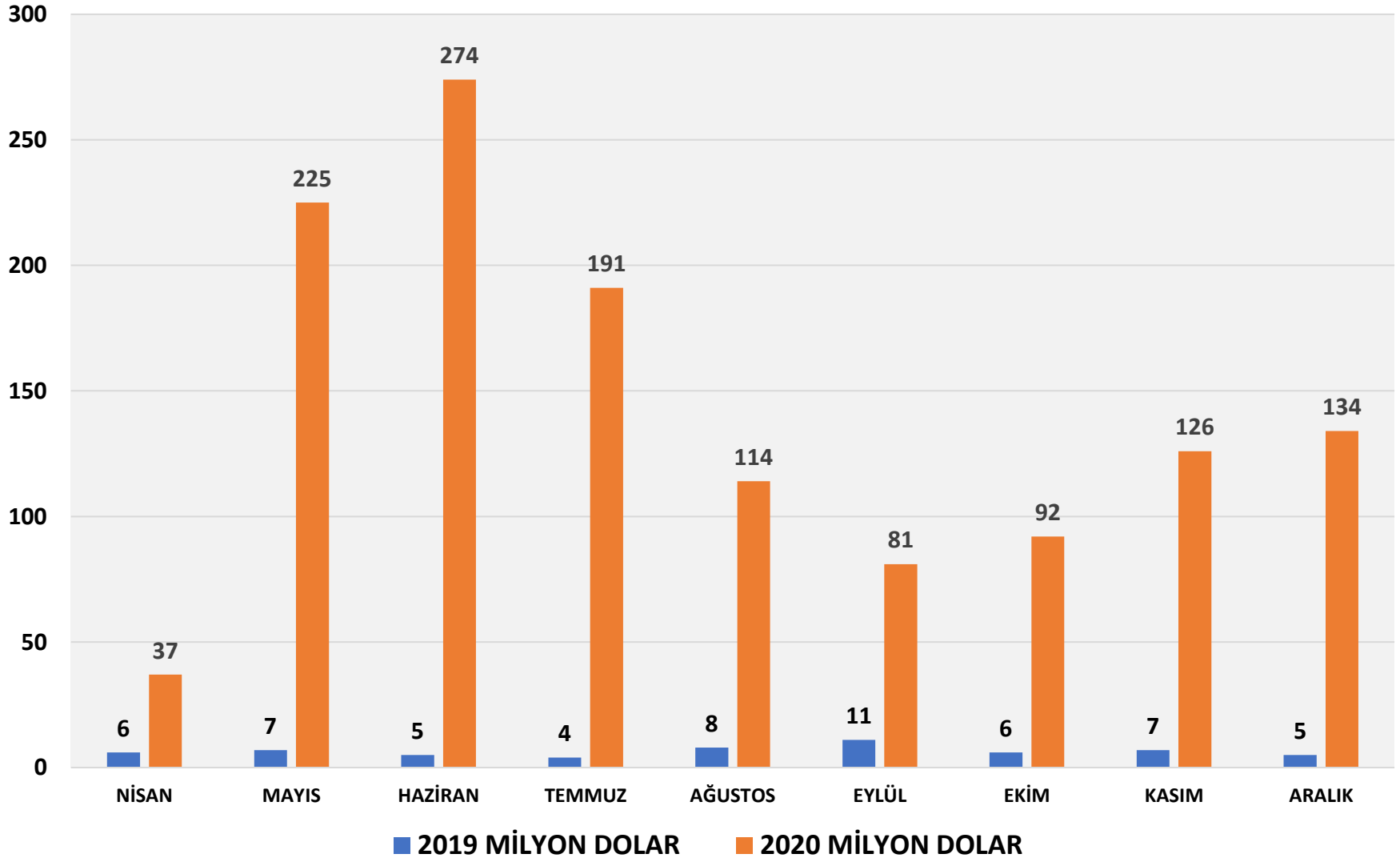
## İHRACAT BİRİM FİYATLARI



KAYNAK: TÜRKİYE İHRACATÇILAR MECLİSİ VERİLERİNDEN HESAPLANMIŞTIR

**MEDİKAL ÜRÜN İHRACATININ ETKİSİ**

| GTİP          | ÜRÜN İSMİ   | 2020<br>BİN DOLAR |
|---------------|---|-------------------|
| 621040000012  | Erkek/erkek çocuk için radyasyon korunma elbisesi;  | 371               |
| 621050000012  | Kadın/kız çocuk için radyasyon korunma elbisesi;  | 18                |
| 621132100011  | Erkek/erkek çocuk için önlük; pamuktan  | 15.780            |
| 621132100012  | Erkek/erkek çocuk için koruyucu elbise; pamuktan  | 37.886            |
| 621133100011  | Erkek/erkek çocuk için önlük; sentetik/suni liftten   | 12.286            |
| 621133100012  | Erkek/erkek çocuk için koruyucu elbise; sentetik/suni liftten   | 80.033            |
| 621142100000  | Kadın/kız çocuk için önlük, gömlek, diğer mesleki kıyafet; pamuktan   | 6.314             |
| 621143100000  | Kadın/kız çocuk için önlük, gömlek, diğer mesleki kıyafet; sentetik/suni mensucattan                                    | 4.819             |
| 621149000019  | Kadın/kız çocuk için diğer kıyafet; dokunabilir diğer maddeden  | 2.544             |
| 630790920000  | Dokunmamış mensucattan yapılmış cerrahi operasyonlarda kullanılan tek kullanımlık örtüler;                              | 23.226            |
| 630790981011  | Tıbbi maskeler (bir kullanımlık); dokunmamış mensucattan  | 212.514           |
| 62101092      | Hastalar veya cerrahlar tarafından cerrahi operasyonlarda giyilen tek kullanımlık dokunmamış mensucattan uzun elbiseler | 575.522           |
| 62101098      | Dokunmamış mensucattan diğer hazır giyim eşyası   | 294.995           |
| <b>TOPLAM</b> |   | <b>1.266.306</b>  |

**MEDİKAL ÜRÜN İHRACATININ ETKİSİ; 2020 YILI 1,27 MİLYAR DOLAR****MEDİKAL GİYSİ, ÖRTÜ VE MASKE İHRACATI MİLYON DOLAR**

## AVRUPA MEDİKAL ÜRÜNLER PAZARINDA PAYIMIZ YÜZDE 1

## AB ÜLKELERİ MASKE VE ÖNLÜK-GİYSİ İTHALATI EURO

| ÜLKELER      | OCAK/EKİM 2019       | OCAK/EKİM 2020        |
|--------------|----------------------|-----------------------|
| <b>EU-27</b> | <b>2.328.428.478</b> | <b>22.887.373.757</b> |
| BELÇİKA      | 114.827.868          | 958.279.315           |
| BULGARİSTAN  | 7.380.318            | 33.306.311            |
| ÇEKYA        | 53.258.319           | 412.979.268           |
| DANİMARKA    | 52.330.593           | 171.881.546           |
| ALMANYA      | 666.474.565          | 6.325.598.027         |
| ESTONYA      | 11.261.381           | 26.161.900            |
| İRLANDA      | 15.630.524           | 208.016.608           |
| İSPANYA      | 134.655.001          | 1.936.173.641         |
| FRANSA       | 351.395.767          | 5.597.656.371         |
| HIRVATİSTAN  | 10.928.058           | 59.381.924            |
| İTALYA       | 155.554.487          | 2.882.061.604         |
| LETONYA      | 5.542.452            | 41.667.910            |
| LİTVANYA     | 12.054.233           | 100.367.354           |
| LÜKSEMBURG   | 6.275.656            | 102.264.333           |
| MACARİSTAN   | 28.987.970           | 286.509.499           |
| MALTA        | 760.142              | 12.042.686            |
| HOLLANDA     | 256.203.687          | 1.259.564.342         |
| AVUSTURYA    | 72.406.789           | 592.303.485           |
| POLONYA      | 148.425.802          | 476.569.996           |
| PORTEKİZ     | 22.694.297           | 279.197.802           |
| ROMANYA      | 44.853.005           | 368.633.344           |
| SLOVENYA     | 11.762.463           | 130.769.289           |
| SLOVAKYA     | 22.688.399           | 126.775.195           |
| FİNLANDİYA   | 26.660.437           | 210.872.180           |
| İSVEÇ        | 80.591.630           | 153.704.105           |
| YUNANİSTAN   | 12.972.319           | 120.111.007           |

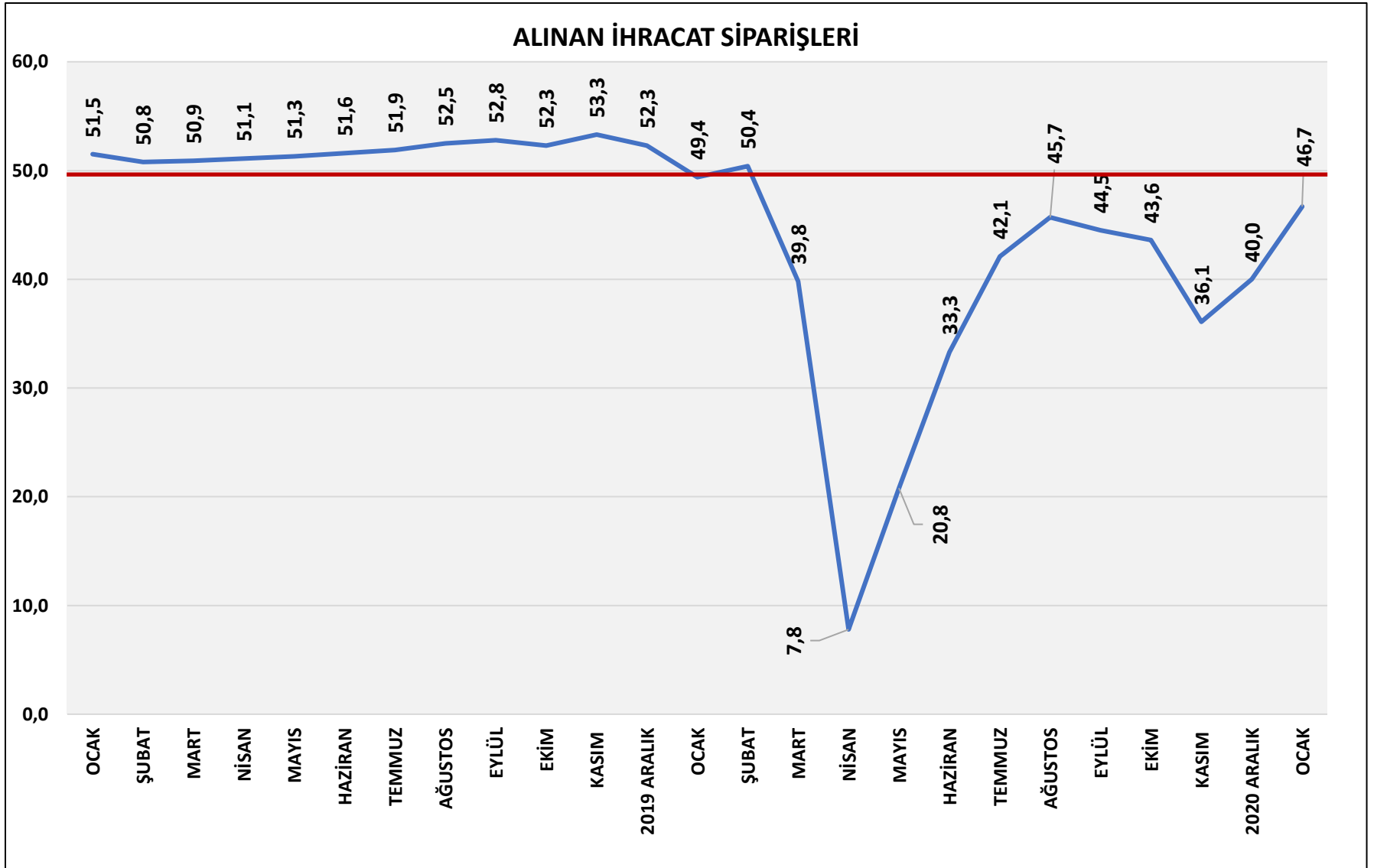
| İTHALAT YAPILAN ÜLKELER OCAK-EKİM 2020 | İTHALAT MİLYON EURO |
|--|---------------------|
| ÇİN                                    | 19.904              |
| VİETNAM                                | 587                 |
| İNGİLTERE                              | 317                 |
| TUNUS                                  | 227                 |
| TÜRKİYE                                | 221                 |
| HONG KONG                              | 207                 |



## İHRACAT PAZARLARINDA GELİŞMELER

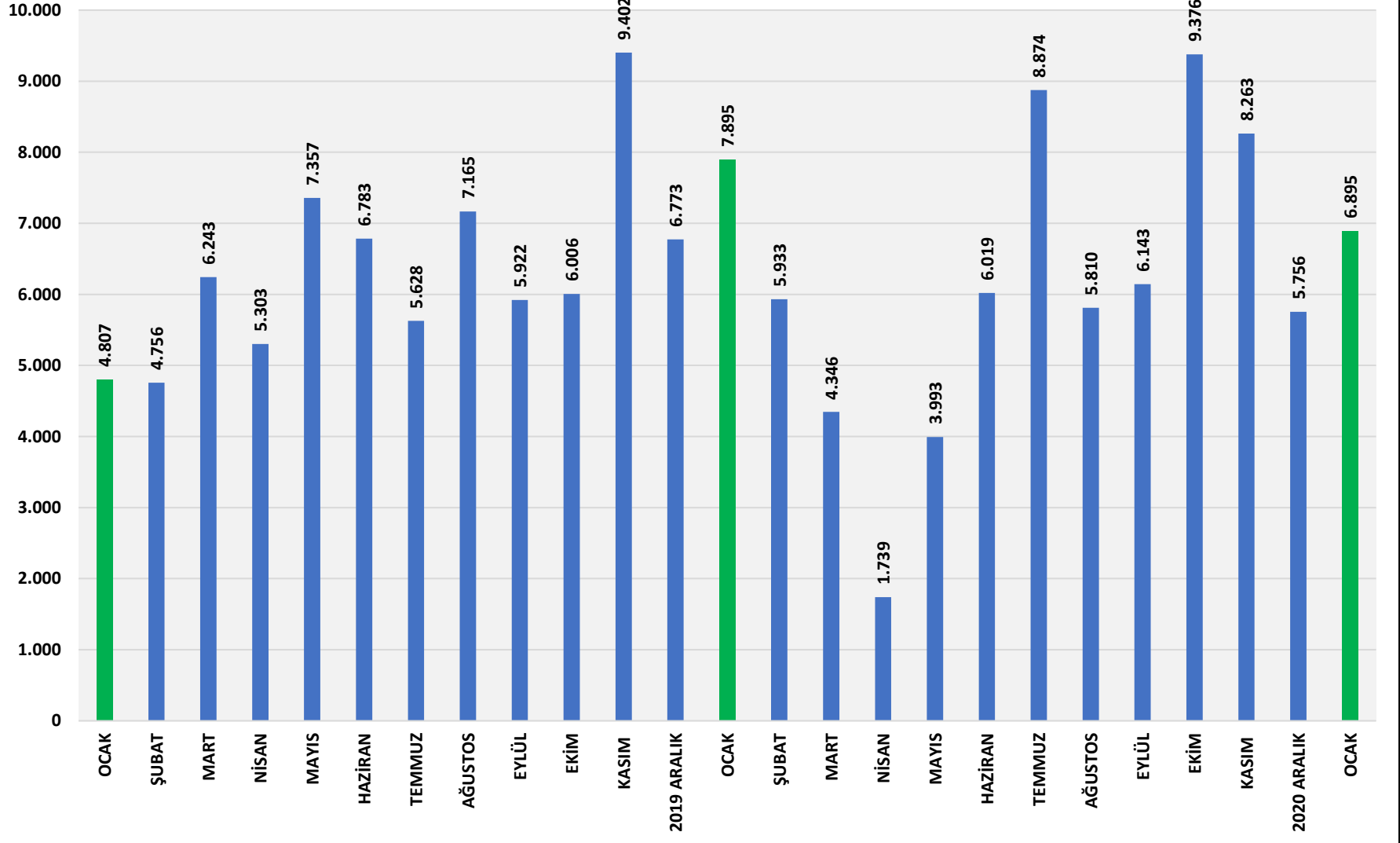
| 2021<br>OCAK SIRA | İHRACAT<br>PAZARLARI | 2020 OCAK<br>MİLYON DOLAR | 2021 OCAK<br>MİLYON DOLAR | 2020/2021 OCAK<br>DEĞİŞİM % |
|-------------------|----------------------|---------------------------|---------------------------|-----------------------------|
| 1                 | ALMANYA              | 281,7                     | 303,9                     | %7,9                        |
| 2                 | İSPANYA              | 186,6                     | 172,6                     | -%7,5                       |
| 3                 | BİRLEŞİK KRALLIK     | 152,1                     | 140,1                     | -%7,9                       |
| 4                 | HOLLANDA             | 123,1                     | 113,2                     | -%8,0                       |
| 5                 | FRANSA               | 81,8                      | 81,7                      | -%0,1                       |
| 6                 | İTALYA               | 66,0                      | 70,1                      | %6,1                        |
| 7                 | DANİMARKA            | 37,0                      | 41,1                      | %11,1                       |
| 8                 | POLONYA              | 26,2                      | 33,2                      | %26,8                       |
| 9                 | IRAK                 | 47,1                      | 33,0                      | -%29,9                      |
| 10                | BELÇİKA              | 26,1                      | 29,6                      | %13,4                       |
| 11                | KAZAKİSTAN           | 17,0                      | 28,5                      | %68,2                       |
| 12                | ABD                  | 42,2                      | 25,3                      | -%40,1                      |
| 13                | İSVEÇ                | 20,1                      | 24,1                      | %19,9                       |
| 14                | RUSYA FEDERASYONU    | 22,5                      | 21,8                      | -%3,0                       |
| 15                | İSRAİL               | 23,4                      | 21,3                      | -%8,9                       |
| 16                | AVUSTURYA            | 13,7                      | 18,7                      | %37,0                       |
| 17                | ÇEKYA                | 9,5                       | 18,7                      | %97,5                       |
| 18                | ROMANYA              | 12,5                      | 17,4                      | %39,3                       |
| 19                | MISIR                | 11,2                      | 12,6                      | %12,1                       |
| 20                | FAS                  | 9,6                       | 11,6                      | %20,7                       |
| 21                | UKRAYNA              | 12,8                      | 11,5                      | -%10,1                      |
| 22                | CEZAYİR              | 13,4                      | 10,8                      | -%19,1                      |

## ALINAN İHRACAT SİPARİŞLERİ YENİDEN ARTIŞ GÖSTERİYOR

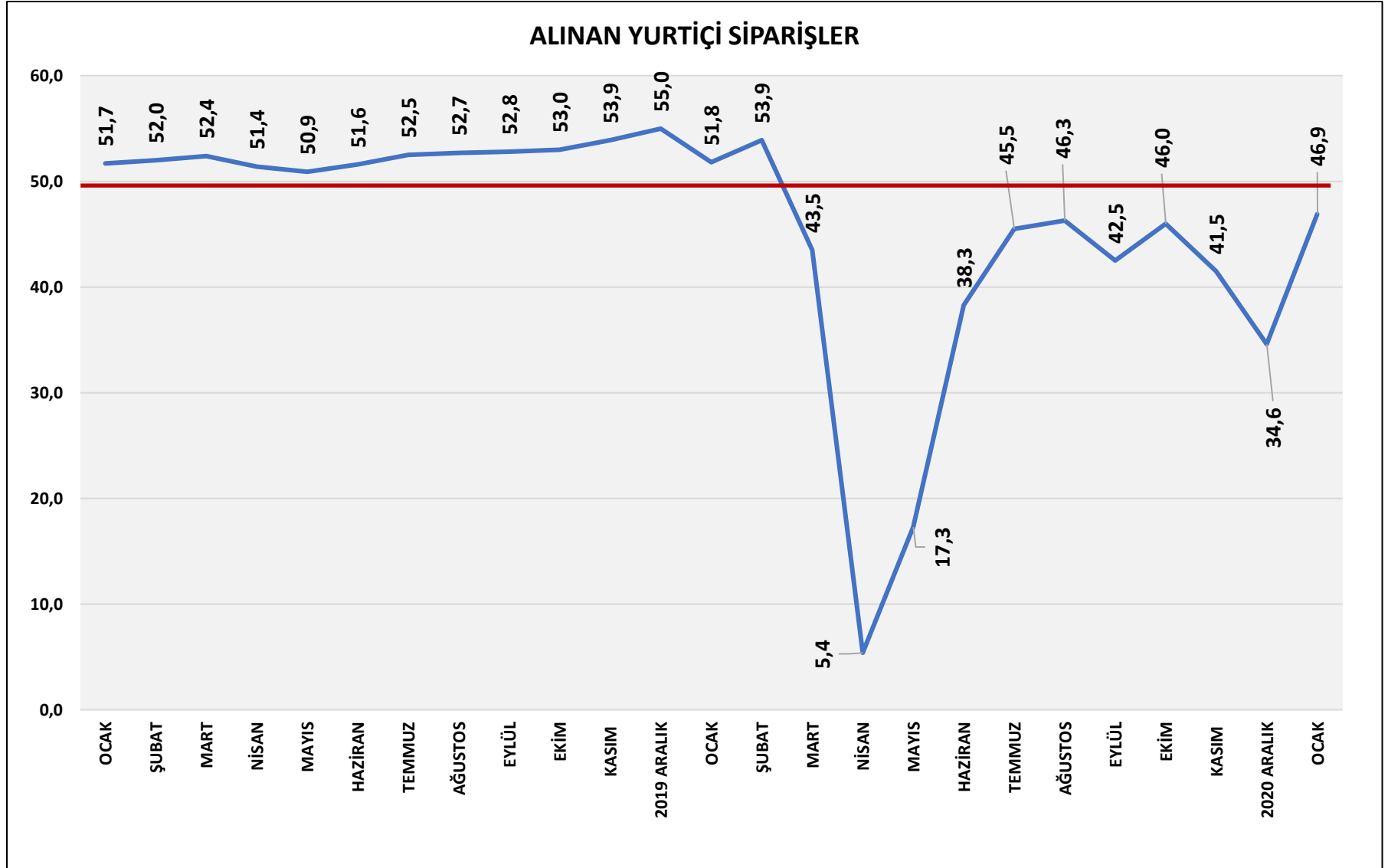


## YURTIÇİ SATIŞLAR ZAYIF KALMAYA DEVAM EDİYOR

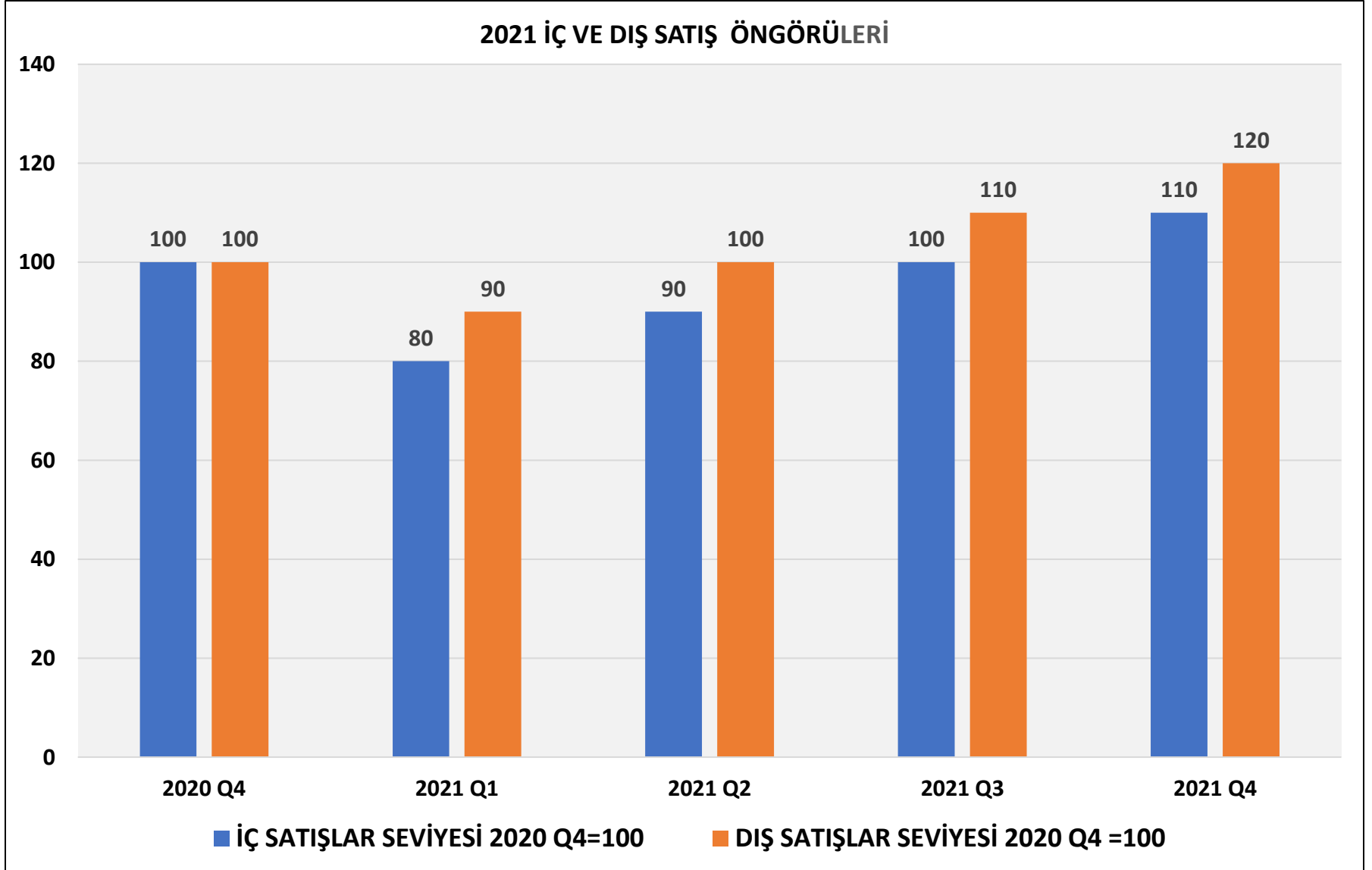
## KREDİ KARTI İLE YAPILAN HARCAMALAR MİLYON TL



## ALINAN YURTIÇİ SİPARİŞLERDE ARTIŞ



## HAZIR GIYİM YURTİÇİ VE YURTDIŞI SATIŞLAR ÖNGÖRÜSÜ

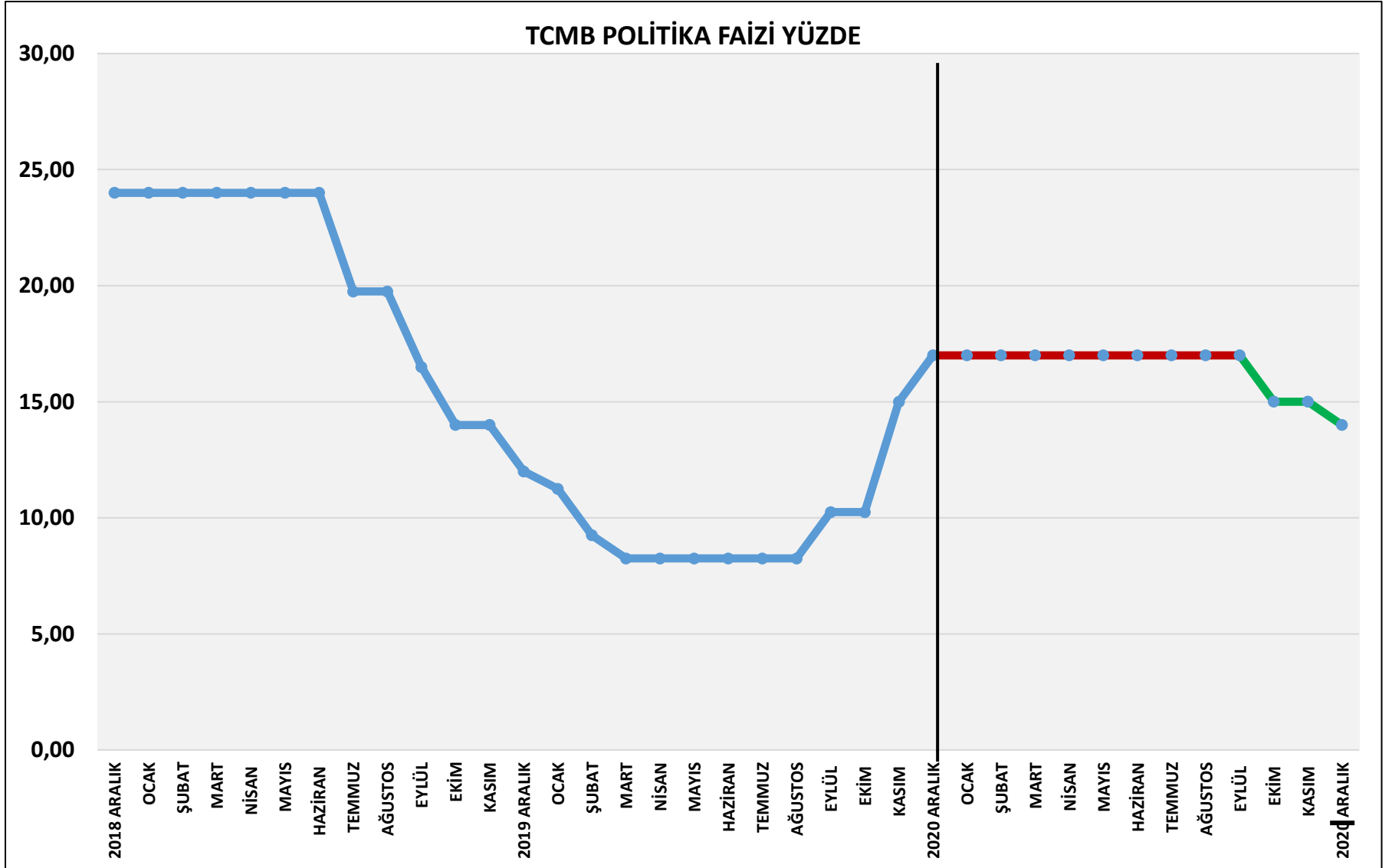


# **TÜRKİYE EKONOMİSİ 2021 YILI GELİŞMELERİ VE BEKLENTİLERİ**

## TÜRKİYE EKONOMİSİNDE 2021 YILINI BELİRLEYECEK 4 UNSUR



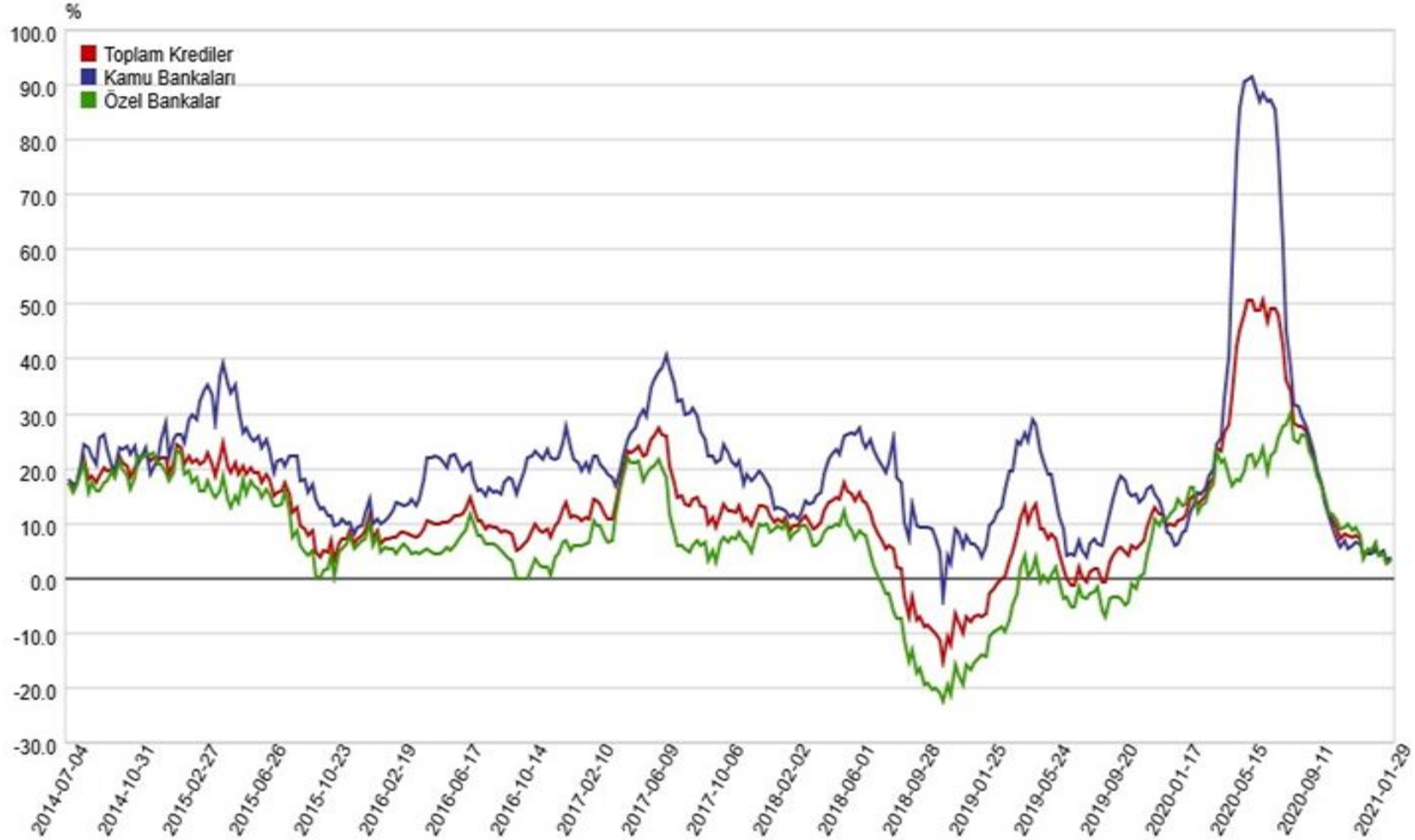
## MERKEZ BANKASI SIKI PARA POLİTİKASI YIL GENELİNDE SÜRECEK



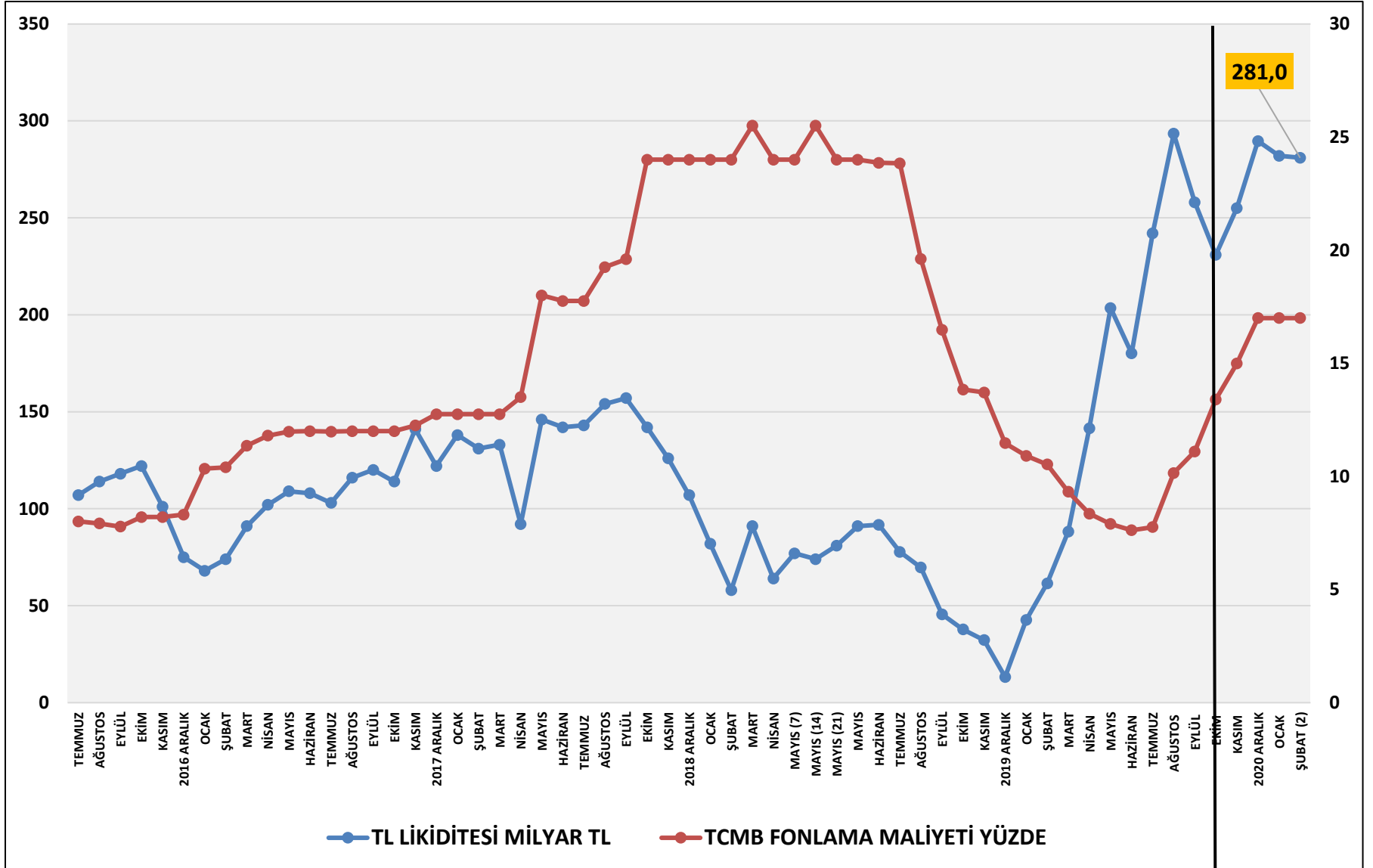


# KREDİ BÜYÜMESİ YENİ YILDA DURDU

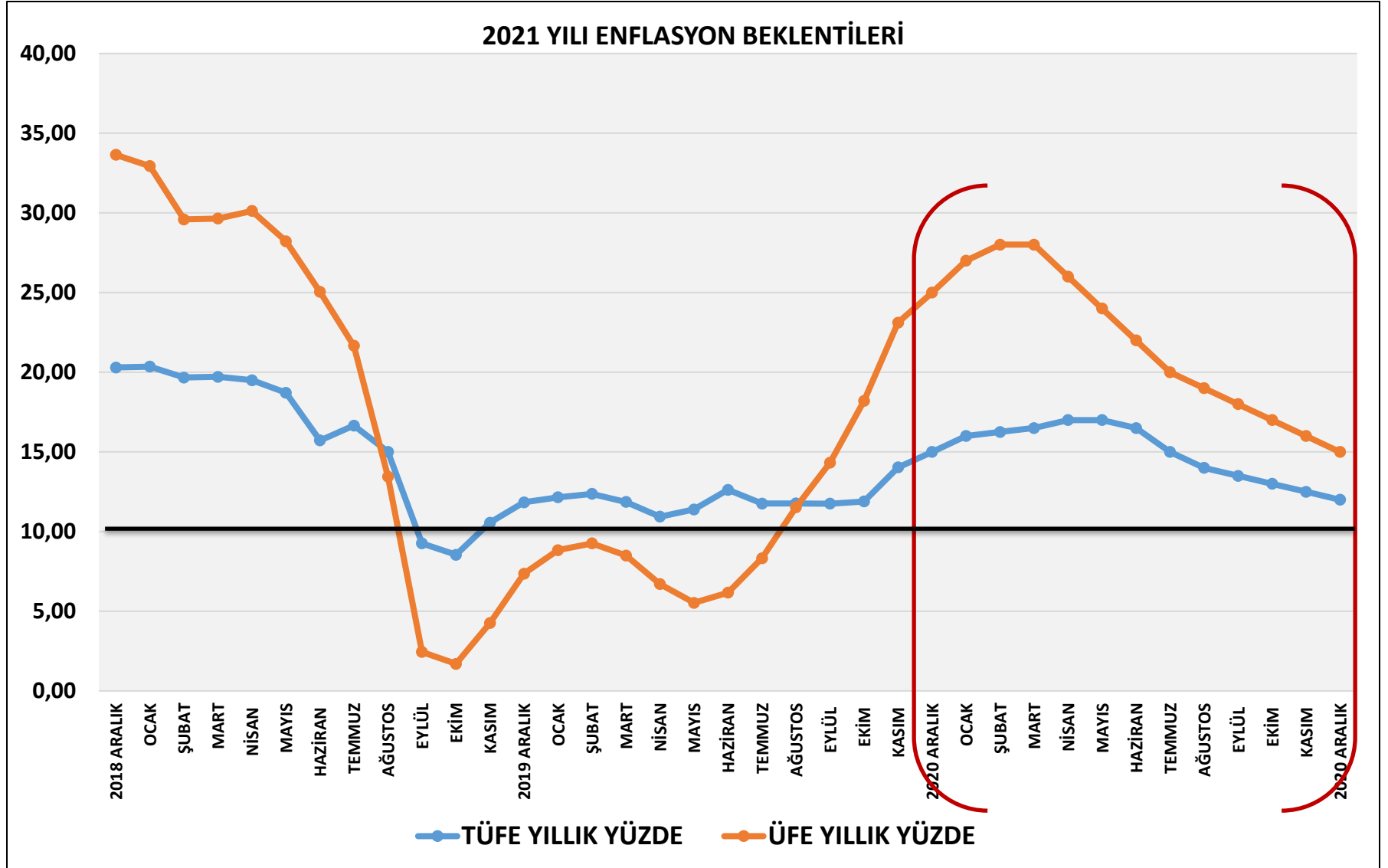
Kredi Büyüme Hızları: Kamu ve Özel Bankalara Göre (13-haftalık yıllıklandırılmış büyüme, kur etkisinden arındırılmış) TÜRKİYE DATA MONİTOR



## MERKEZ BANKASI LİKİDİTE POLİTİKASI; GENİŞ LİKİDİTE KORUNUYOR



## ENFLASYONDA ÖNCE ARTIŞ ARDINDAN GERİLEME BEKLENTİSİ



## MERKEZ BANKASI NE YAPMAK İSTİYOR?

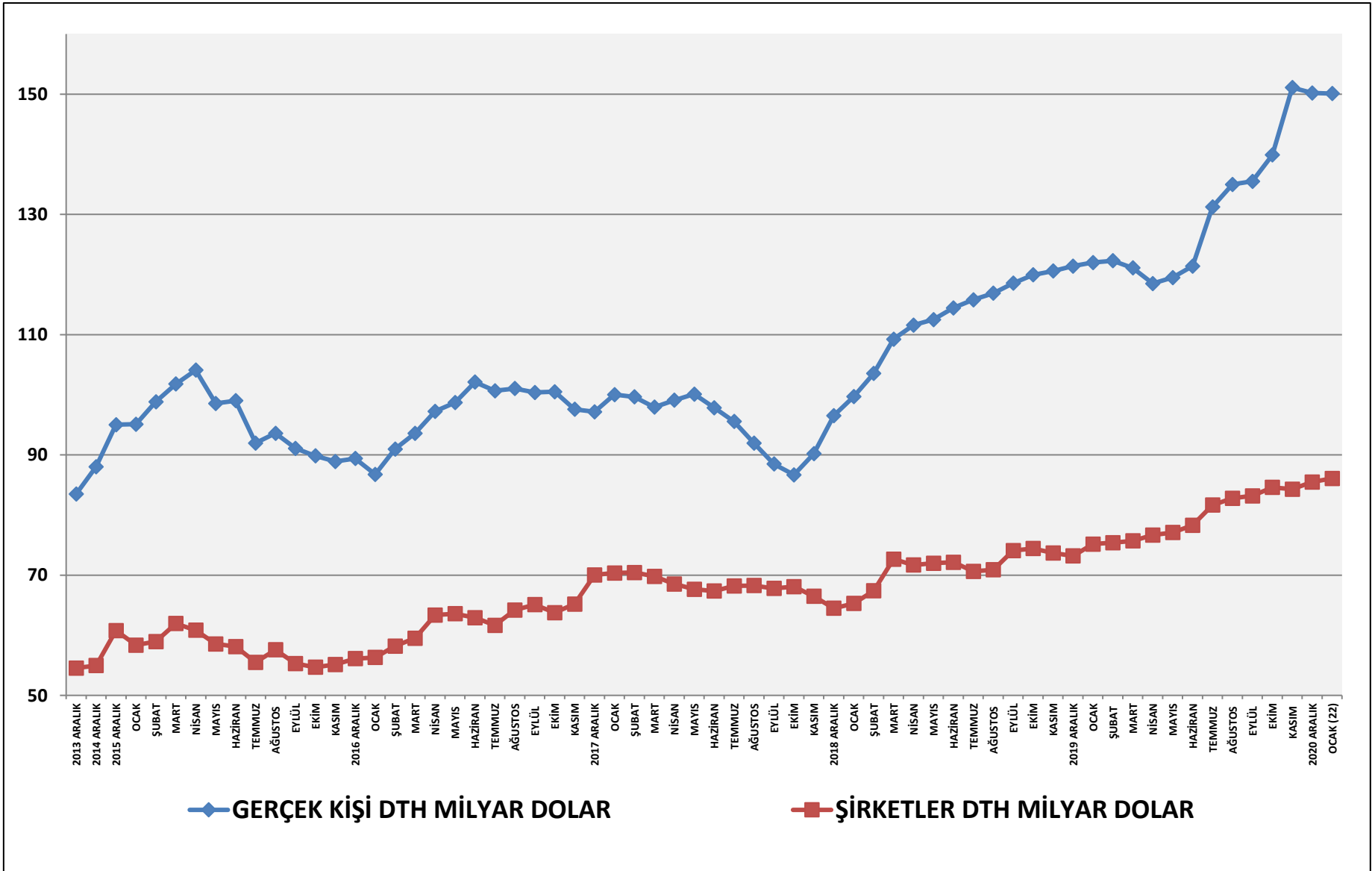
«SIKI PARA POLİTİKASI UZUN SÜRECEK VURGUSU KUVVETLENİYOR»

## YÜKSEK FAİZLER



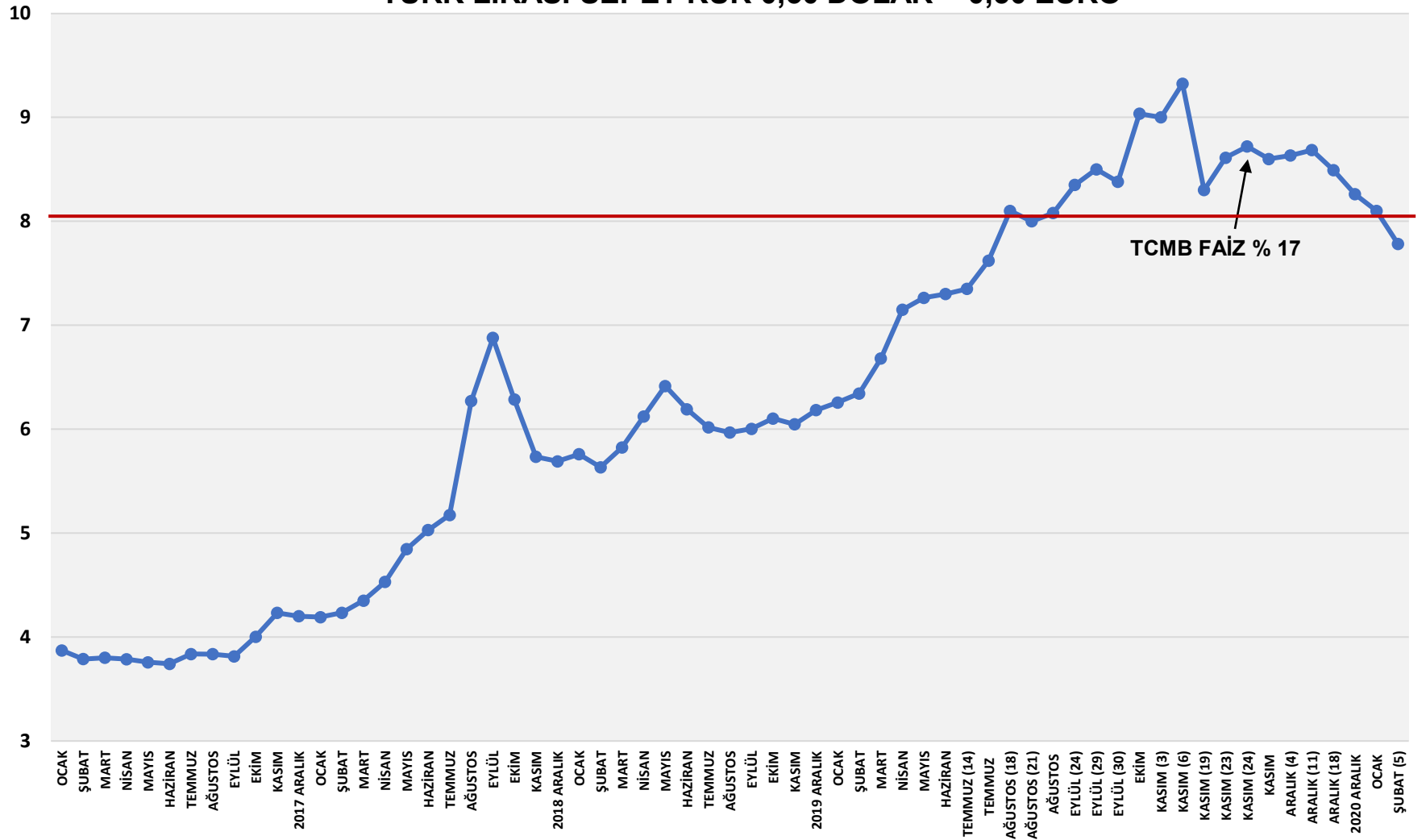
2021 YILI GENELİ

## DÖVİZ TEVDİAT HESAPLARI ARTMAYA DEVAM EDİYOR

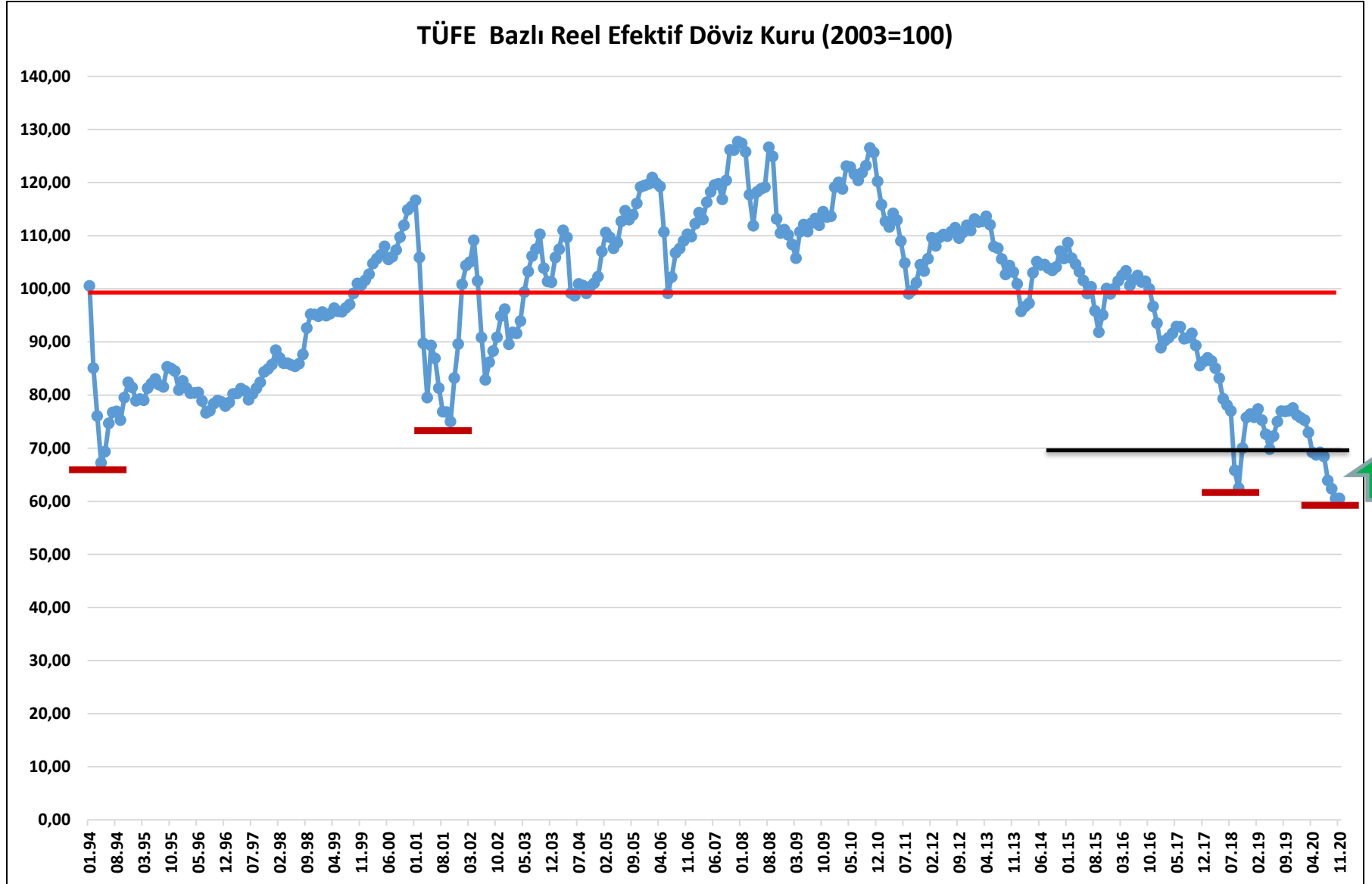


## TÜRK LİRASININ PARA POLİTİKASI DEĞİŞİMİNE TEPKİSİ

## TÜRK LİRASI SEPET KUR 0,50 DOLAR + 0,50 EURO



# TÜRK LİRASI BUNDAN SONRA NASIL SEYREDER? «DEĞER KAZANMA BEKLENTİSİ»



## 2021 YILI İLK YARISI REFORMLAR İÇİN ÇOK ÖNEMLİ

OCAK ŞUBAT MART NİSAN MAYIS HAZİRAN +

İKİNCİ YARI

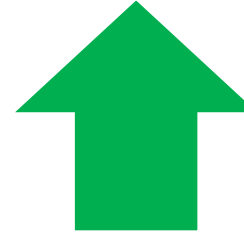
İYİMSER BEKLENTİLER  
VE AÇILMIŞ KREDİ İLK  
AYLARDA SÜRECEK

EKONOMİK  
REFORMLAR

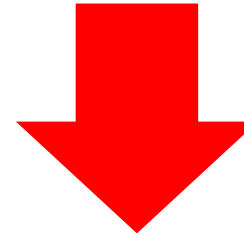
DEMOKRASİ VE HUKUK  
REFORMLARI

AB VE ABD İLE İYİ  
İLİŞKİ ARAYIŞI

AB ZİRVESİ + ABD  
POLİTİKASI



REFORMLAR BAŞARILI  
BATI İLE İYİ İLİŞKİLER



REFORMLAR BAŞARISIZ  
BATI İLE İLİŞKİLER  
SIKINTILI



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