

It is the report of the situation monitoring of the television industry and trade in our country as of March 2020 - 2021.

In the last year, the electronics industry sector has grown by 22%. However, while this growth was reflected negatively on giant brands, sub-brands were included in the sales rates.

Television sales have created a domestic market of nearly one billion dollars and an economy of five billion dollars in total. Despite this high turnover level, the electronics industrialist could not achieve the expected profit margin. The main reason for this is the unfair competition environment.

The brands, which are increasing day by day, have had a hard time providing on-site service to the consumer due to their low profit margin and high service costs. TV services, which are required by law to be in every region and provide service, were established only as per the procedure, and support was provided from the central service in case of malfunction.

The electronics industry is very developed in our country and an average of 30 million TVs and set-top boxes are manufactured annually. While our companies are striving to catch up with the quality standards around the world, they have to make sales much lower than the price range that they should be in the face of the sales policy of medium and small-sized companies that are eager to be in the market with their own brands.

Unfortunately, our successful brands have become unable to meet the high and ever-increasing costs with low profit margins. It must be sure that our electronics industry sets its standards in television in order to provide permanent growth and equitable after-sales service. The brand to be built in this way will be more efficient and permanent for all stakeholders.

Currently, we have nearly a hundred brands, all of which are foreign-dependent in production and import. While these brands pursue an import-based sales policy, they cause permanent damage to our country's electronics industry. However, we have brands that proudly represent us in this field, such as Vestel, Sunny and Arçelik, which have made technological structuring and investments that can rival world giants such as Samsung and LG.

We also have industrialists who are progressing very professionally. However, unfortunately, many of our small brands follow the logic of selling only with growth enthusiasm and panic.

Our country is in the category of people who watch TV the most with 4.5 hours of TV viewing per day. In addition, our people who follow the technology closely change the new technologies and new generation televisions with their existing devices at a rate of 40%. This change presents a large market to our electronics industry.

In addition, the fact that our country is in the EU Customs Union enables it to export TVs to all European countries without customs duty, and thanks to this advantage, Chinese and Korean manufacturers establish production and sales bases in our country.

At the same time, Turkey, which is the technology gate of the gas and oil-rich Middle East, meets all the electronic product needs of the MENA region.

Both geographical proximity and this tax advantage are great opportunities for the electronics industry of our country. Unless evaluated with smart policies, our brands that do their job properly will unfortunately have to change their policies or downsize.

In the last year, 4.4 million TVs were sold in the domestic market. 80% of the satellite receiver televisions sold are TKGS certified.

March 2020- 2021 figures

	IMPORT	DOMESTIC PRODUCE	EXPORT	DOMESTIC MARKET	TOTAL
TOTAL TV	1.170.000	13.000.000	9.800.000	4.370.000	14.170.000
TV WITH EMBEDDED RECEIVER	960.000	8.200.000	5.000.000	4.160.000	9.160.000
TV WITH TKGS	240.000	3.560.000	300.000	3.500.000	3.800.000
TV WITHOUT TKGS	720.000	9.740.000	9.500.000	570.000	10.460.000
TV FROM MONITOR	130.000	85.000	65.000	150.000	215.000
OPTIONAL MONİTOR	120.000	1.400.000	250.000	1.270.000	1.520.000
SMART TV	1.080.000	10.400.000	7.840.000	3.640.000	11.480.000

Education, work and life at home have increased the importance of television all over the world. While the company with the highest growth and investment in the television and electronics industry was LG in the world, Atmaca Elektronik was the company in our country.

In the last two years, 7 more production facilities participated in TV production and increased the number of our production facilities to 21. Among these facilities, other than Vestel, Arçelik and Sunny, they only produce with typeetting and assembly services.

THERE ARE 80 BRANDS SOLD IN OUR COUNTRY, THEY HAVE 3700 SEPARATE MODEL TELEVISIONS.

THESE BRANDS HAVE INTERNAL SATELLITE RECEIVER. HOWEVER, 23 OF THESE BRANDS HAVE TKGS AND ONLY 37 OF THESE BRANDS HAVE THE EXTENSIVE SERVICE NETWORK WORKING.

57 OF 80 BRANDS HAVE BANDROL REGISTRATION AND BUYING BANDROL IN TRT. UNFAIR COMPETITION WILL MAKE THE ELECTRONICS INDUSTRY DIFFICULT.

TELEVISION BRANDS SOLD IN OUR COUNTRY

ALTUS	HISENSE	PHILIPS	SUNGATE
ARÇELİK	HITACHI	PROFILO	SUNNY
AUDIOMAX	HITECH	QUAX	SUNPLUS
AWOX	HOMSTAR	RANOX	SUPERMAX
AXEN	INSIGNIA	REDLINE	TCL
BEKO	JAMESON	REGAL	TECHWOOD
BLAUPUNKT	JVC	RONAX &RONAXSTAR	TECNOBOX
BOTECH	KAMOSONİC	ROSE	TELEFOX
CVS	LG	ROWELL	TELEFUNKEN
DELTA	LOEWE	SABA	TELENOVA
DIGIPOLL	MOONSTAR	SAMSUNG	TOSHIBA
DIJITSU	MORIO	SANYO	TRIDENT
DREAMSTAR	NAVIGOLD	SEG	VENTUS
ELECTROMASTER	NAVITECH	SEİKON	WELTON
ELTON	NEXON	SHARP	WESTON
FINLUX	NEXT	SHOWMAX	WOON
GOLDMASTER	NORDMENDE	SKYTECH	XIAOMI
GRUNDIG	NOVA	SONY	YUMATU
HERZ	ONVO	SOUNDMAX	
HI-LEVEL	PANASONIC	STRONG	

We are the first country in the world with a 41% tax rate for television purchases. About half of every television purchased is paid by our companies to the state. While a maximum budget of 3 thousand TL was allocated to buy TV in the past years, this amount has increased to 5 to 8 thousand TL in the last year.

In the last year, 55 inch and above TVs have been the most preferred segment in TV screen preferences. The entry of companies producing satellite receivers into the market with new brands caused a 35% decrease in the sales of big brands.

In particular, television sales of retail markets put the price-indexed point of view on the consumer. Evaluating the product with only its numerical value, without seeking the standards and after-sales services of the product purchased with this logic, created negative habits in the sector.

World brands started to invest in our country and show themselves in the sector with their own brands. However, if the sectoral consensus and fair competition environment cannot be established, their accommodation does not seem very possible.

The giant company of the electronics industry, such as Arçelik, has taken its place in the sales chart with 380 thousand TV sales. Unfortunately, when all quality and legal standards are maintained and the price quality index is ignored, the competitiveness of our companies decreases.

Unfortunately, there are logos of foreign platforms and one-button login software on almost every remote of TVs with embedded applications. As TUYAD, FREE IPTV can provide Turksat, Digiturk, D-Smart, Tivibu, Exxen, BluTV and similar local platforms to serve more widely. Our cooperation with RTUK on the subject continues.

When TUYAD FREE IPTV software is applied to domestically produced TVs, we will have broadcasts and platforms on approximately 20 million TVs per year distributed in the domestic and foreign markets.

HAYRETTİN ÖZAYDIN

Chairman of TUYAD