



Istanbul Chamber of Industry Türkiye Sector PMI®

New orders ease across the board in August

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The Istanbul Chamber of Industry Türkiye Sector PMI® indices are compiled by S&P Global from questionnaire responses from a panel of around 800 manufacturers in Türkiye. Indices are available for 10 manufacturing categories, covering output, demand, capacity, prices and purchasing, and are the earliest indicators of economic performance for these sectors.

Commenting on the August survey results, Andrew Harker, Economics Director at S&P Global Market Intelligence said:

"Turkish manufacturers continued to face a challenging demand environment in August, and this was reflected in new orders easing across all of the 10 sectors covered by the Sector PMI report. This in turn had impacts on production and employment, both of which saw fewer pockets of growth than in July."

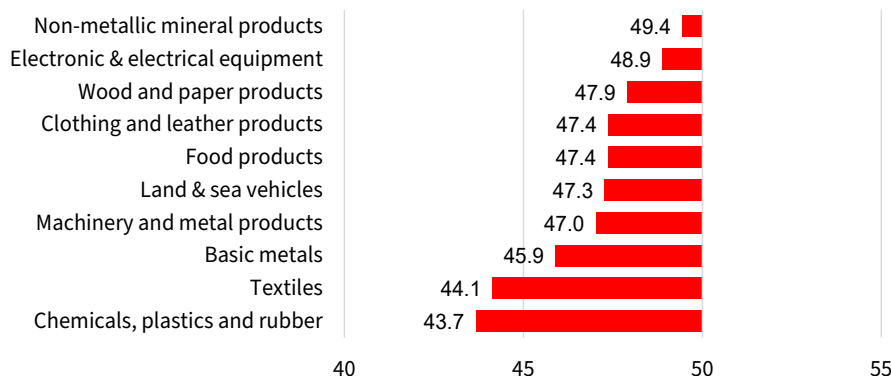
"The chemicals, plastics and rubber

sector was the worst affected, posting the sharpest slowdowns in output and new orders as selling price inflation surged higher."

"In fact, inflationary pressures caused issues across the board, with input costs increasing sharply in each of the categories covered again in August."

Türkiye Sector PMI

sa, >50 = improvement since previous month, August '26



Sources: Istanbul Chamber of Industry, S&P Global PMI.



Overview

Widespread moderations in business conditions

Chemicals, plastics and rubber sector faces particularly challenging month

Input costs continue to rise sharply

The latest Türkiye Sector PMI® report highlighted widespread demand challenges for Turkish manufacturers, despite some signs of improvement in new export orders. In turn, growth of production was limited and fewer categories posted increases in staffing levels than had been the case in July. Rates of input cost inflation remained sharp, but some sectors kept rises in selling prices modest amid efforts to secure new work.

New orders eased across the board in August, the first time in five months in which this has been the case. The sharpest slowdown in new business was in the chemicals, plastics and rubber category, with the weakest in clothing and leather products. Moderations in total new business were registered despite half of the 10 monitored sectors posting increases in new export orders.

Muted demand conditions led the majority of sectors to scale back production in August. The only exception was non-metallic mineral products where output rose for the second month running, and at a solid pace that was the fastest since May 2022. As was the case with new orders, the most pronounced moderation of output was seen in the chemicals, plastics and rubber sector.

Muted trends in new orders and output resulted in caution among manufacturers when making staffing decisions in August. Only two sectors posted job creation during the month, down from five in July. Land & sea vehicles companies registered a rise in employment for the fourth month running, while a fractional expansion in the basic metals category ended an eight-month sequence of moderation.

Purchasing activity eased across the board, relieving some pressure on supply chains and meaning that half of the 10 sectors covered saw lead times shorten during the month. That said, a marked lengthening of suppliers' delivery times continued to be signalled in the electronic & electrical equipment category.

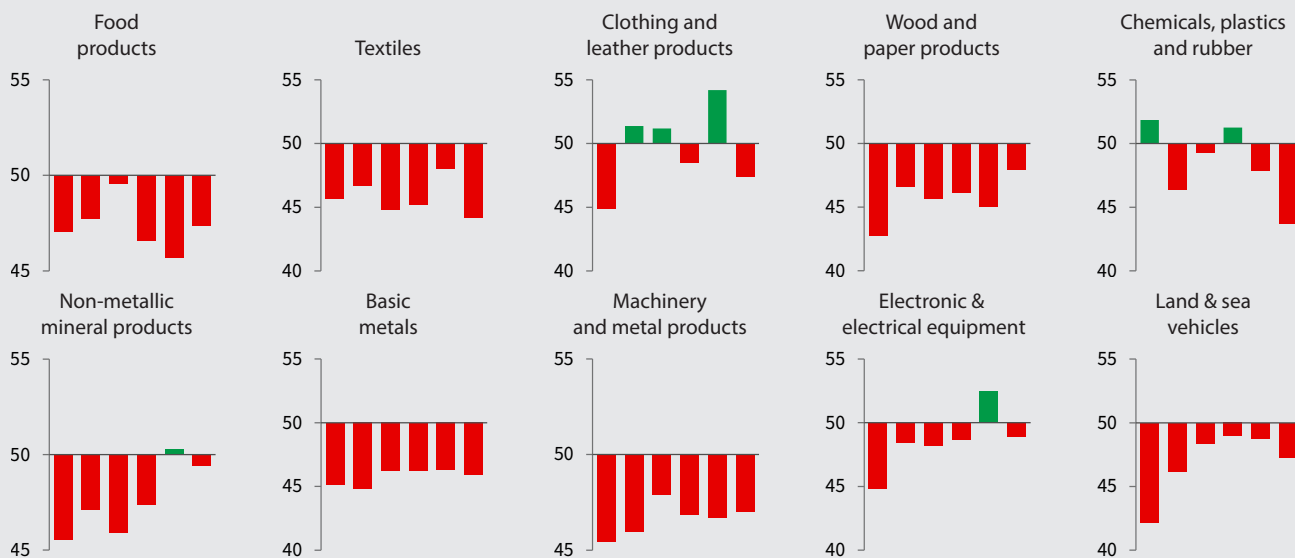
Electronic & electrical equipment firms also noted the most pronounced cost inflation in August, with input prices rising at the fastest pace in five months. Most sectors saw cost inflation accelerate, the main exception being wood and paper products where the latest increase was the slowest since last November.

In response to higher input costs, selling prices rose across the board. That said, the rise in charges at clothing and leather products firms was only marginal.

Sector PMI overview

sa, >50 = improvement since previous month, Mar - Aug '26

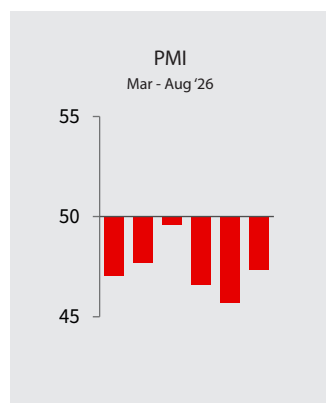
Sources: Istanbul Chamber of Industry, S&P Global PMI.





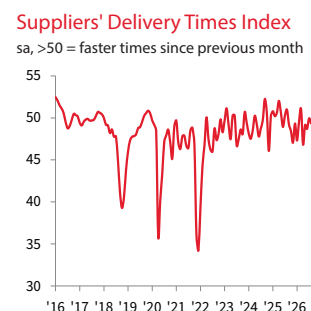
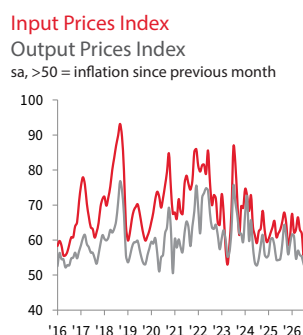
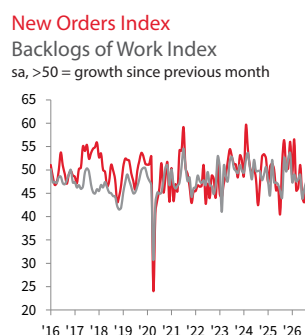
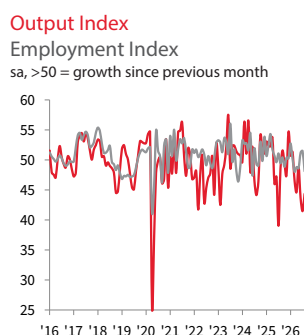
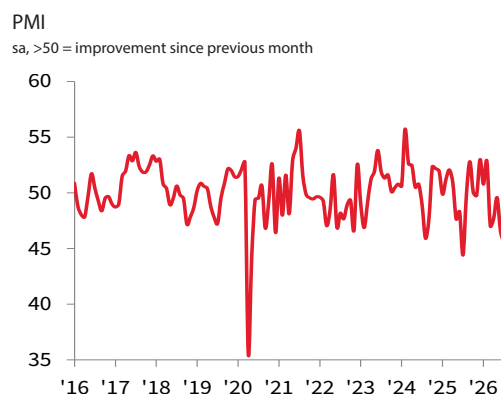
Food products

Softer moderation in new orders amid growth in export sales



Although new orders continued to ease in the food products category during August, the pace of moderation slowed from that seen in July. Total new business inflows were supported by increasing new export orders. Output also continued to ease in August, but to a lesser extent than in the prior month. Meanwhile, employment was scaled back for the first time since May.

The rate of input cost inflation accelerated to a four-month high, but output prices rose at the slowest pace since the end of 2020.



Index summary
sa, 50 = no change over previous month

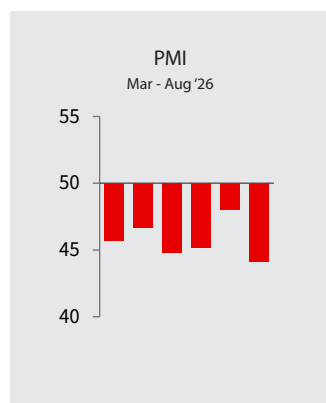
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03-26	47.1	46.6	45.6	47.9	47.5	48.1	48.5	62.9	54.7	46.6	51.1	47.7
04-26	47.7	44.6	46.2	44.4	48.1	48.8	51.6	66.5	57.0	44.2	46.8	49.6
05-26	49.6	48.8	51.1	47.3	48.9	48.6	52.1	63.0	55.7	47.3	49.1	47.0
06-26	46.6	43.7	44.3	49.1	43.9	51.2	50.3	61.8	55.2	42.2	48.7	44.3
07-26	45.7	41.5	43.1	50.8	45.9	51.5	45.6	55.6	53.0	45.4	49.9	46.1
08-26	47.4	44.4	47.5	51.4	47.5	48.1	48.9	64.7	52.2	45.9	49.3	47.8





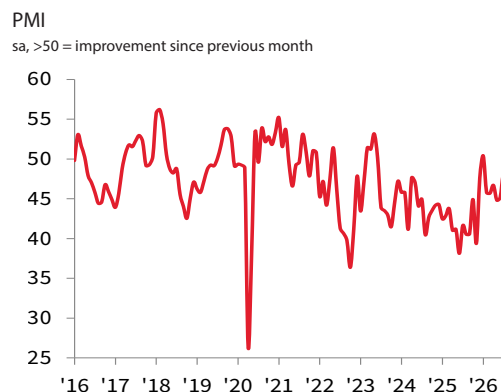
Textiles

Renewed easing of employment amid sharper slowdown in output



Textiles manufacturers in Türkiye scaled back employment in August, following a slight increase in July. Moreover, the solid easing of staffing levels was the most marked since March. Firms were motivated to limit workforce numbers amid sharper slowdowns in both output and new orders.

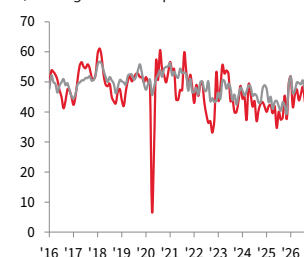
Purchasing activity, meanwhile, eased to the greatest extent in nine months, with lower demand for inputs helping to lead to shorter suppliers' delivery times. Meanwhile, rates of input cost and output price inflation quickened slightly.



Output Index

Employment Index

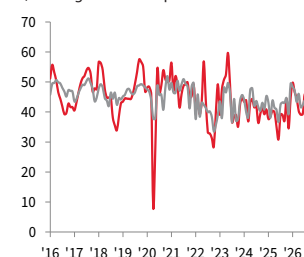
sa, >50 = growth since previous month



New Orders Index

Backlogs of Work Index

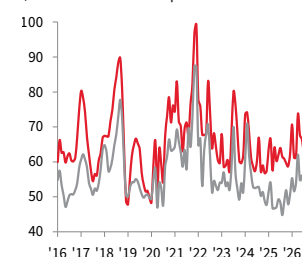
sa, >50 = growth since previous month



Input Prices Index

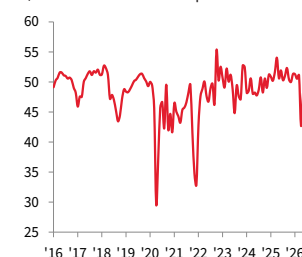
Output Prices Index

sa, >50 = inflation since previous month



Suppliers' Delivery Times Index

sa, >50 = faster times since previous month



Index summary

sa, 50 = no change over previous month

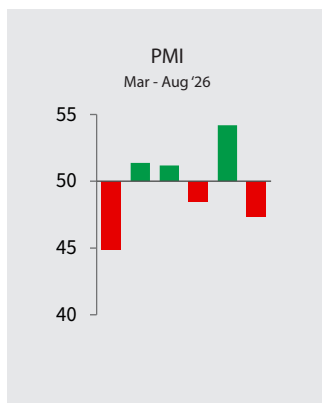
	PMI	Output	New Orders	New Export Orders	Backlogs of Work	Employment	Stocks of Finished Goods	Input Prices	Output Prices	Quantity of Purchases	Suppliers' Delivery Times	Stocks of Purchases
03-26	45.7	45.6	44.6	46.9	43.3	47.0	47.5	61.3	53.8	42.7	51.1	41.7
04-26	46.7	47.5	40.4	40.6	46.1	49.8	46.7	73.7	62.1	46.1	42.7	41.6
05-26	44.8	43.9	39.1	44.0	41.6	49.6	44.9	67.7	54.8	44.3	48.1	43.9
06-26	45.2	45.9	39.4	43.7	42.3	49.2	42.4	66.6	56.1	45.3	48.7	43.5
07-26	48.0	48.3	46.0	45.2	43.6	50.5	48.4	62.8	53.0	44.3	48.9	44.0
08-26	44.1	43.3	40.5	43.3	39.4	47.1	44.0	63.2	53.2	38.8	50.3	42.9





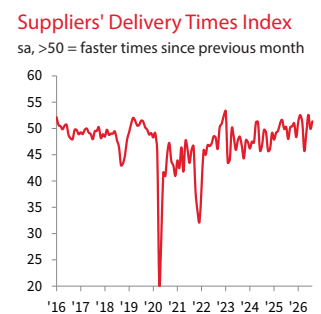
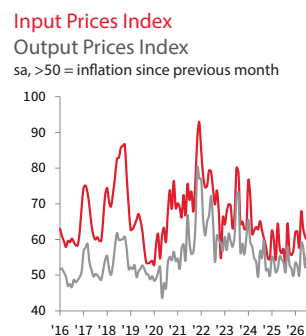
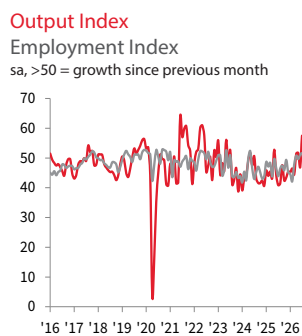
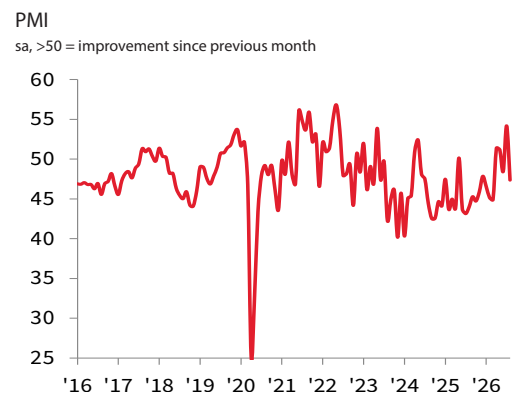
Clothing and leather products

Renewed slowdown in production



August data pointed to a renewed slowdown in output of clothing and leather products, following a sharp increase in July. Production thus eased for the second time in the past three months, with the same pattern seen with regards to new orders. On a more positive note, new export business continued to rise. Nonetheless, firms scaled back employment and purchasing.

Input costs continued to increase sharply in August, but firms raised their selling prices only marginally, and at the slowest pace of all 10 monitored sectors.

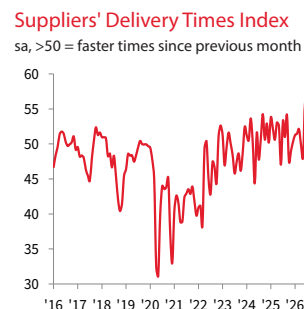
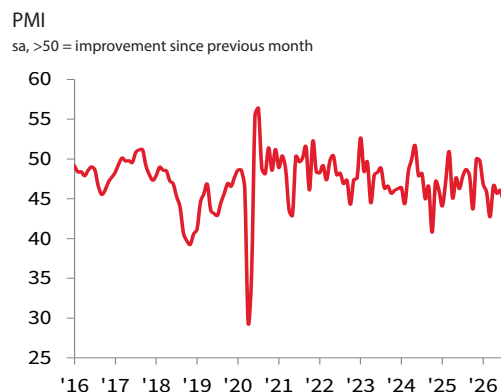


Index summary
sa, 50 = no change over previous month

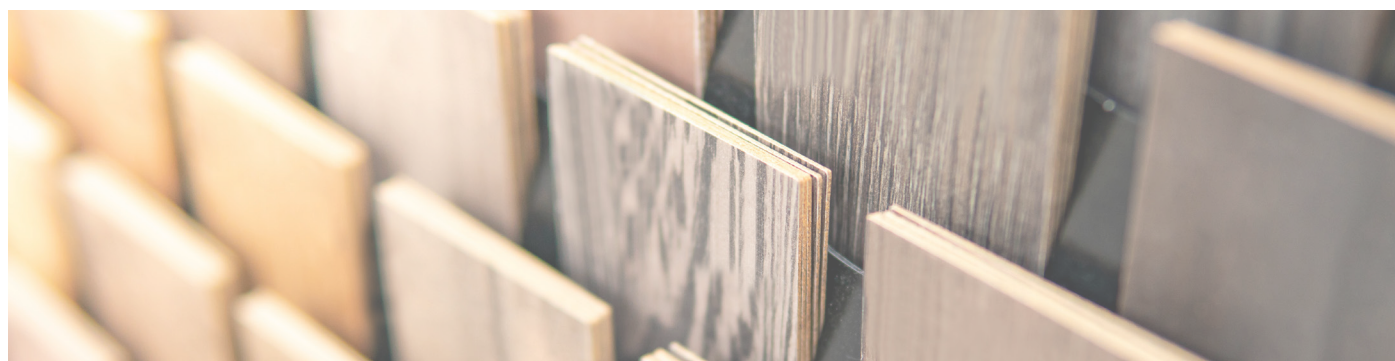
	PMI	Output	New Orders	New Export Orders	Backlogs of Work	Employment	Stocks of Finished Goods	Input Prices	Output Prices	Quantity of Purchases	Suppliers' Delivery Times	Stocks of Purchases
03-26	44.9	44.5	43.3	46.6	41.1	47.9	42.1	57.8	50.0	44.4	51.2	38.8
04-26	51.4	51.5	51.9	49.7	46.0	50.8	48.6	67.8	59.1	47.0	45.7	46.5
05-26	51.2	51.7	52.0	51.5	51.0	49.6	49.1	63.0	57.8	50.2	49.2	50.9
06-26	48.5	46.9	48.2	52.2	42.0	51.1	53.3	60.8	52.2	45.3	52.6	49.3
07-26	54.2	57.6	55.3	56.3	53.0	51.5	54.6	60.0	56.2	53.4	49.9	54.2
08-26	47.4	44.4	48.6	53.6	43.5	48.1	50.9	60.7	50.2	45.9	51.4	47.8



Input cost inflation slows sharply in August



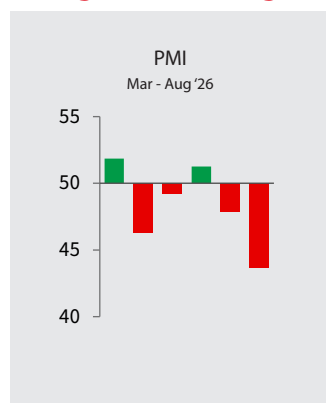
	PMI	Output	New Orders	New Export Orders	Backlogs of Work	Employment	Stocks of Finished Goods	Input Prices	Output Prices	Quantity of Purchases	Suppliers' Delivery Times	Stocks of Purchases
03-26	42.7	38.8	38.6	46.3	39.6	49.0	46.6	63.2	59.7	39.8	52.1	44.7
04-26	46.6	45.6	45.2	46.0	42.4	47.8	43.8	71.3	60.8	40.4	49.8	45.6
05-26	45.7	45.9	43.2	48.5	44.9	45.5	44.9	69.8	65.6	43.3	48.1	43.7
06-26	46.1	48.8	45.1	46.7	45.9	47.2	48.2	64.4	57.5	43.9	55.9	43.1
07-26	45.0	42.1	43.8	50.8	44.6	46.4	46.4	69.6	61.5	46.2	51.0	46.9
08-26	47.9	48.5	47.6	50.3	44.7	49.1	43.0	58.7	56.2	45.9	51.4	43.7





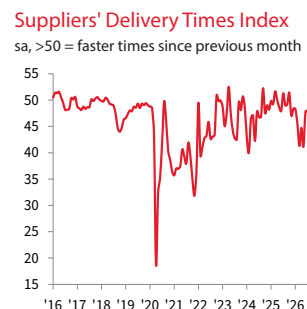
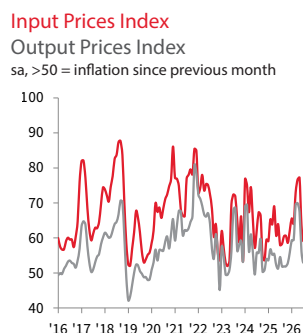
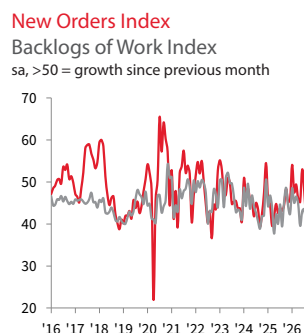
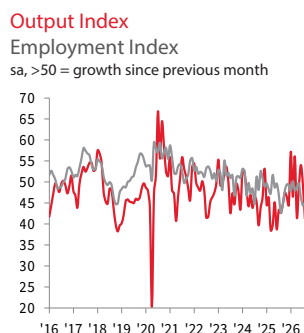
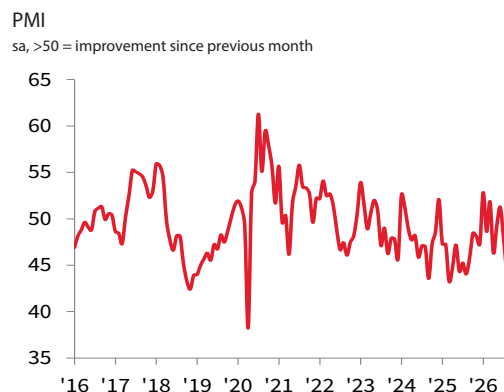
Chemicals, plastics and rubber

Chemicals, plastics and rubber sector sees sharpest slowdown in output of all categories in August



Production in the chemicals, plastics and rubber category eased for the second month running in August, and at a substantial pace that was the most pronounced since June 2025. The slowdown was also the strongest of the 10 monitored sectors. This was also the case with new orders, which eased to the largest extent for almost a year-and-a-half.

The chemicals, plastics and rubber sector also led the way in terms of selling price inflation as firms responded to sharply rising input costs.



Index summary sa, 50 = no change over previous month

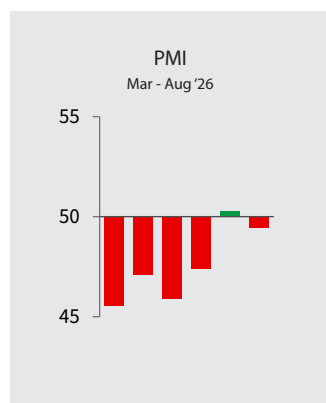
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03-26	51.8	56.1	49.4	48.0	46.6	48.0	43.7	73.0	69.5	54.2	41.3	45.7
04-26	46.3	41.6	46.0	44.5	44.9	48.8	45.7	76.7	69.9	40.3	44.7	40.6
05-26	49.2	48.8	45.3	50.7	39.6	49.6	44.0	77.2	67.4	49.3	41.1	47.0
06-26	51.2	54.0	53.0	50.1	43.0	46.4	48.3	63.6	56.1	48.3	47.8	47.4
07-26	47.8	49.4	48.0	48.5	43.5	44.4	44.5	59.1	53.0	44.3	47.9	44.0
08-26	43.7	41.3	40.3	43.6	40.2	45.1	42.9	65.0	60.5	41.7	46.3	41.9



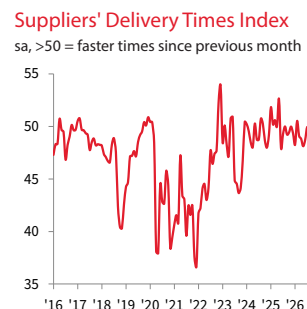
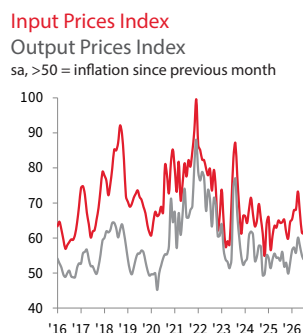
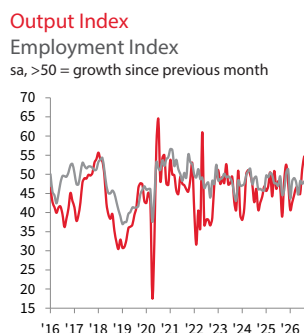
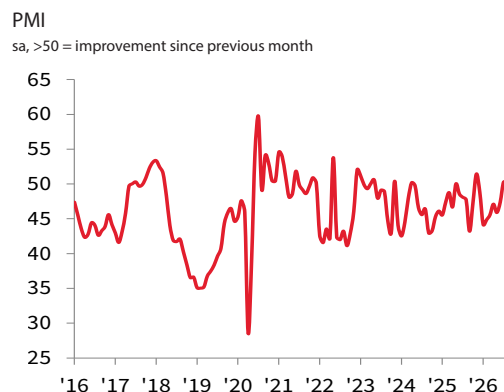


Non-metallic mineral products

Sharpest rise in output since May 2022

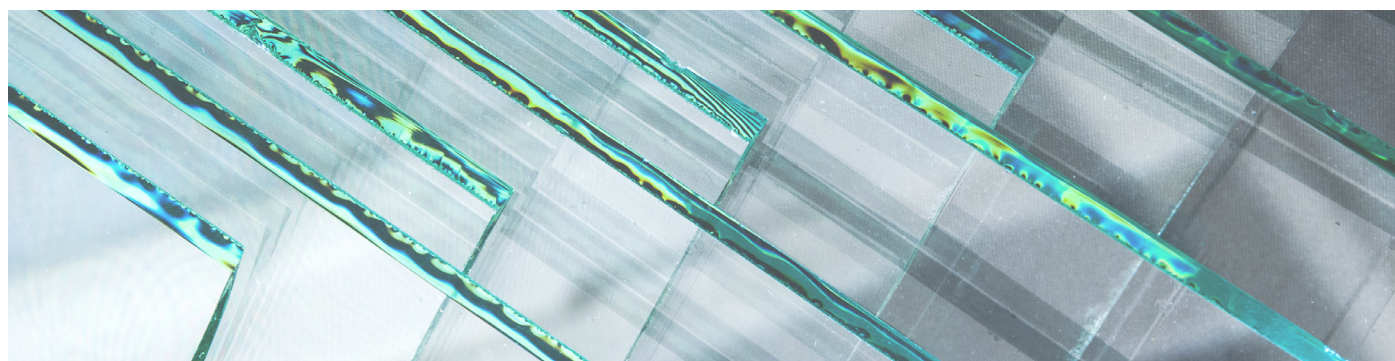


The non-metallic mineral products sector was the only one to record a rise in output during August. Moreover, production increased for the second month running, and at a marked pace that was the fastest since May 2022. The rise in output was registered in spite of a renewed slowdown in new orders. Firms also scaled back employment, purchasing and inventories. Input costs increased sharply in August, with the rate of inflation hitting a three-month high. In turn, output prices also rose at a faster pace.



Index summary
sa, 50 = no change over previous month

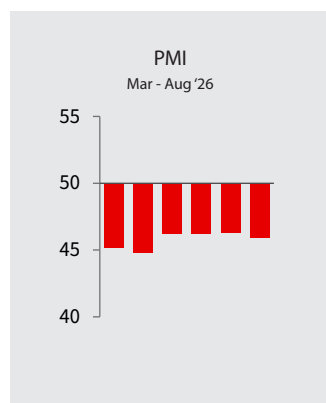
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04-26	47.1	46.6	44.2	47.5	45.2	47.8	45.7	73.3	60.1	47.0	48.8	49.6
05-26	45.9	46.0	44.3	42.8	42.7	44.7	51.1	67.4	57.8	46.4	48.1	43.9
06-26	47.4	44.9	47.3	45.7	45.2	48.3	47.3	61.6	55.1	47.2	48.7	46.3
07-26	50.3	51.3	51.1	49.6	52.9	47.5	51.4	61.4	53.9	48.4	49.9	51.0
08-26	49.4	54.7	46.6	49.2	46.6	48.1	46.9	67.0	55.2	49.0	49.3	45.8





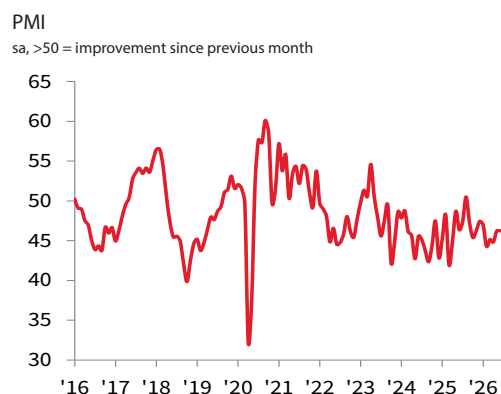
Basic metals

Basic metals sector completes full year of slowing new orders



As has now been the case on a monthly basis throughout the past year, basic metals manufacturers in Türkiye signalled a slowdown in new orders in August. The latest moderation was sharp and the fastest since October last year. New export orders also eased. A similar picture was seen with regards to production, while firms also scaled back purchasing activity.

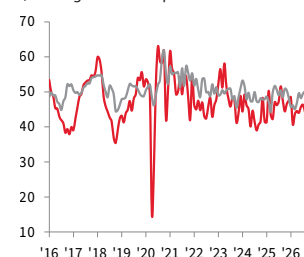
On a more positive note, employment stabilised in August, ending an eight-month sequence of moderation. This helped firms to work through outstanding business.



Output Index

Employment Index

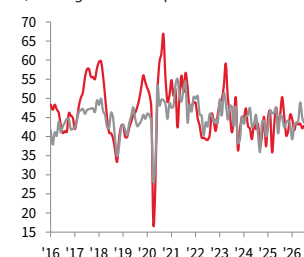
sa, >50 = growth since previous month



New Orders Index

Backlogs of Work Index

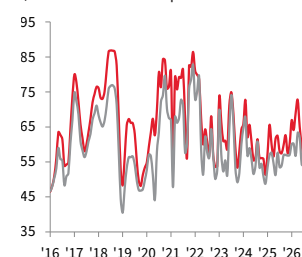
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Input Prices Index

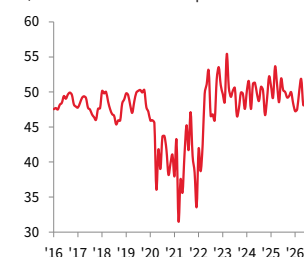
Output Prices Index

sa, >50 = inflation since previous month



Suppliers' Delivery Times Index

sa, >50 = faster times since previous month



Index summary

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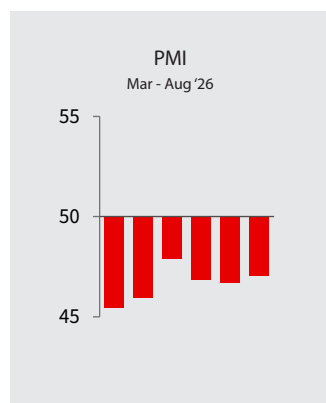
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04-26	44.8	44.5	43.1	44.6	44.1	46.8	42.5	72.8	63.3	42.2	51.8	41.5
05-26	46.2	44.1	43.4	46.2	48.9	49.6	49.1	65.0	61.9	44.4	48.2	45.0
06-26	46.2	45.7	42.2	44.7	44.9	48.2	50.3	60.0	54.3	45.1	48.7	48.3
07-26	46.3	46.3	42.8	42.1	43.6	49.5	46.4	56.7	54.0	44.3	49.9	44.9
08-26	45.9	44.4	41.3	42.1	44.7	50.1	47.9	63.7	57.4	44.9	49.3	47.8





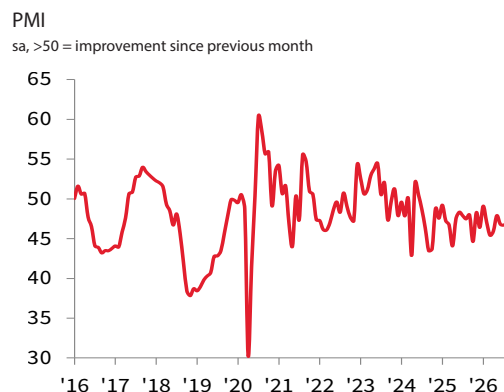
Machinery and metal products

Employment scaled back to largest extent since April 2020

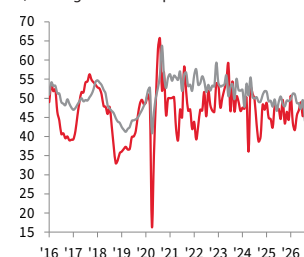


Total new orders moderated for the fourteenth consecutive month during August, despite a renewed expansion of new export orders. In turn, production was scaled back, albeit marginally, and workforce numbers eased. Moreover, the slowdown in employment was the sharpest since April 2020 and most pronounced of the 10 monitored sectors.

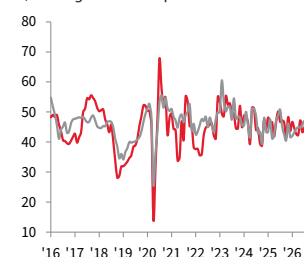
Purchasing activity was also scaled back markedly, with lower demand for inputs resulting in a second successive monthly shortening of suppliers' delivery times.



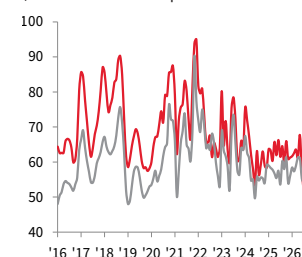
Output Index
Employment Index
sa, >50 = growth since previous month



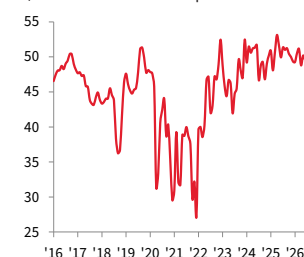
New Orders Index
Backlogs of Work Index
sa, >50 = growth since previous month



Input Prices Index
Output Prices Index
sa, >50 = inflation since previous month



Suppliers' Delivery Times Index
sa, >50 = faster times since previous month



Index summary
sa, 50 = no change over previous month

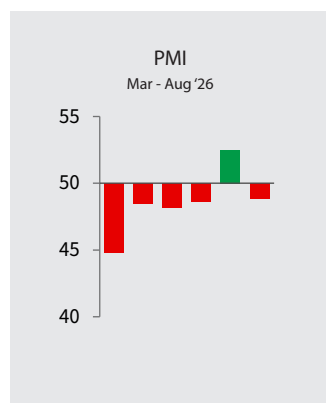
	PMI	Output	New Orders	New Export Orders	Backlogs of Work	Employment	Stocks of Finished Goods	Input Prices	Output Prices	Quantity of Purchases	Suppliers' Delivery Times	Stocks of Purchases
03-26	45.4	41.7	42.7	45.2	44.4	51.0	45.5	63.5	58.9	42.7	51.1	46.5
04-26	45.9	45.5	42.3	49.7	44.9	48.8	45.5	61.2	61.3	46.1	48.8	44.4
05-26	47.9	46.9	47.2	49.7	44.8	48.6	44.9	67.7	61.1	48.3	50.2	48.0
06-26	46.8	48.9	43.3	47.8	45.9	47.3	48.2	57.9	55.2	48.2	49.7	46.2
07-26	46.7	45.3	44.7	48.3	46.8	49.5	45.5	52.7	54.0	45.3	51.0	47.0
08-26	47.0	49.5	46.5	50.3	41.4	44.1	48.9	60.7	53.2	43.9	51.4	45.8





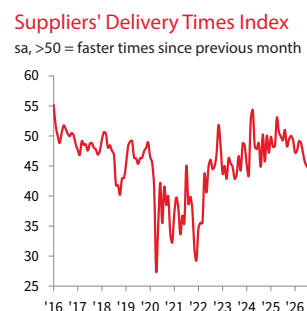
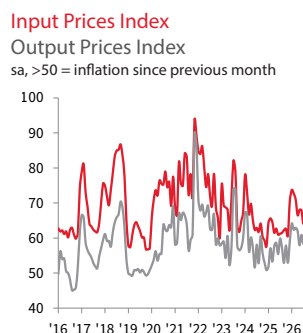
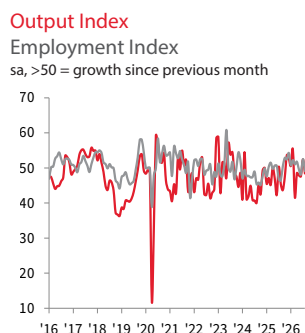
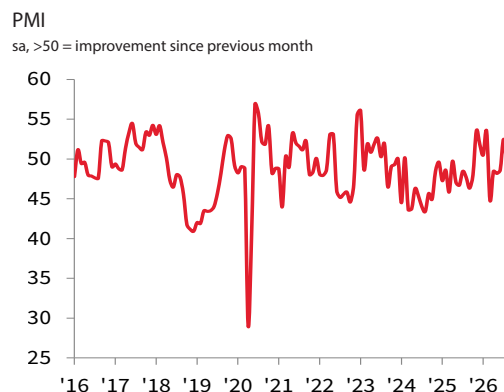
Electronic & electrical equipment

Renewed slowdown in production amid steep rise in input costs



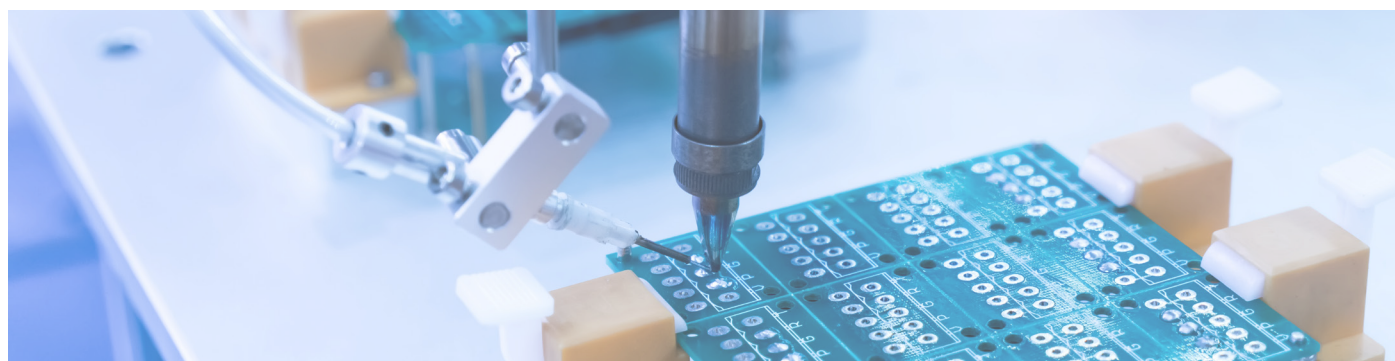
Output in the electronic & electrical equipment sector eased for the fifth time in the past six months during August, following a solid expansion in July. This was also the case with regards to new orders, although new business from abroad continued to rise. Meanwhile, employment was scaled back slightly.

Firms in the sector faced a sharp and accelerated rise in input costs, with the rate of inflation outpacing the other monitored categories. A rapid increase in output prices was also recorded.



Index summary
sa, 50 = no change over previous month

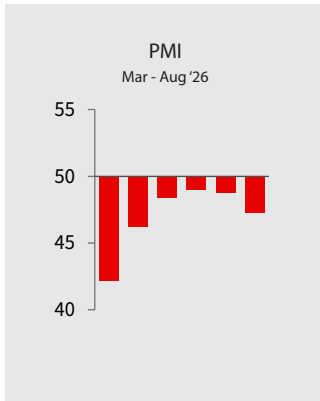
	PMI	Output	New Orders	New Export Orders	Backlogs of Work	Employment	Stocks of Finished Goods	Input Prices	Output Prices	Quantity of Purchases	Suppliers' Delivery Times	Stocks of Purchases
03-26	44.8	41.6	40.6	45.6	43.2	51.0	48.4	71.0	62.9	39.6	49.1	44.2
04-26	48.4	48.5	46.1	47.4	46.0	51.8	43.4	66.5	62.1	48.0	48.8	44.5
05-26	48.2	47.9	45.2	48.4	42.8	49.6	51.2	68.0	57.9	46.3	47.1	47.9
06-26	48.6	47.6	48.1	45.7	45.8	48.2	46.9	67.9	60.9	48.0	45.5	44.8
07-26	52.5	52.4	53.2	51.9	46.6	52.5	47.3	64.1	58.3	52.3	44.9	46.7
08-26	48.9	48.4	47.5	50.3	44.5	49.1	44.8	69.1	59.4	47.8	44.3	43.5





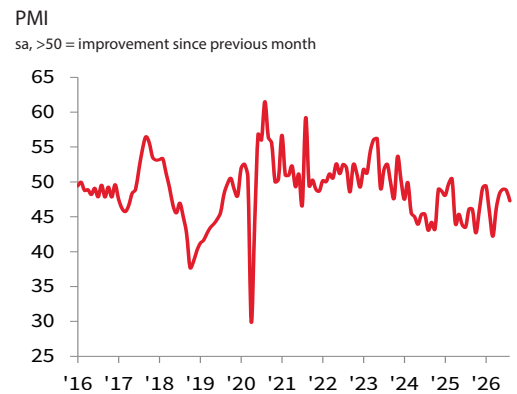
Land & sea vehicles

Land & sea vehicles manufacturers continue to hire additional staff in August



August data pointed to a thirty-third consecutive monthly slowdown in new orders at land & sea vehicles manufacturers, with the pace of moderation quickening from that seen in July. In turn, a sharper easing of production was also recorded. On a more positive note, staffing levels continued to rise, increasing for the fourth month running.

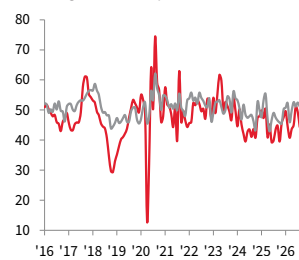
Input costs increased markedly again, albeit at a slightly reduced pace. The rate of output price inflation also softened. Meanwhile, supplier performance improved.



Output Index

Employment Index

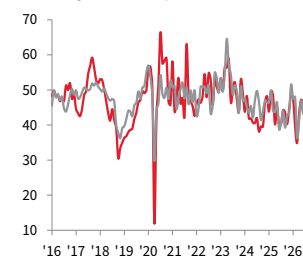
sa, >50 = growth since previous month



New Orders Index

Backlogs of Work Index

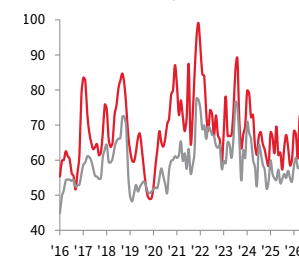
sa, >50 = growth since previous month



Input Prices Index

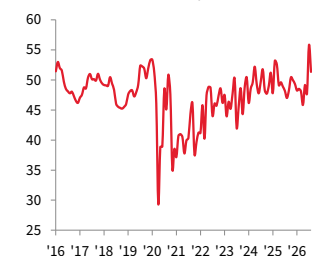
Output Prices Index

sa, >50 = inflation since previous month



Suppliers' Delivery Times Index

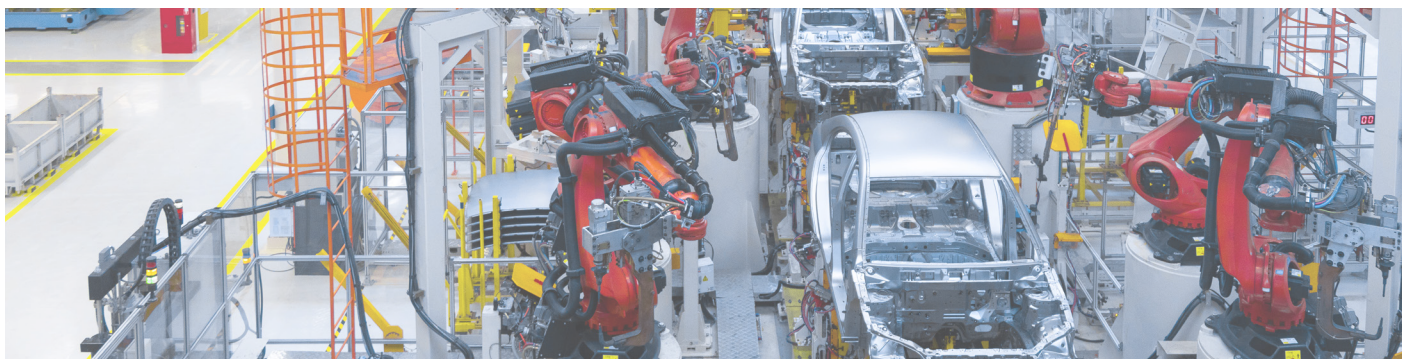
sa, >50 = faster times since previous month



Index summary

sa, 50 = no change over previous month

	PMI	Output	New Orders	New Export Orders	Backlogs of Work	Employment	Stocks of Finished Goods	Input Prices	Output Prices	Quantity of Purchases	Suppliers' Delivery Times	Stocks of Purchases
03-26	42.2	40.7	34.9	43.7	36.4	45.9	45.6	60.6	57.8	38.8	48.1	45.6
04-26	46.2	43.7	43.3	44.6	41.5	49.8	48.6	72.8	58.1	43.3	45.8	41.8
05-26	48.4	45.0	47.2	49.2	46.9	52.6	51.1	64.3	54.8	48.3	49.2	48.0
06-26	49.0	51.0	45.3	49.1	43.2	51.1	45.3	66.9	52.3	48.2	47.7	45.3
07-26	48.8	49.4	48.0	49.7	44.8	52.5	51.4	66.2	61.7	52.3	55.8	49.0
08-26	47.3	44.4	46.6	48.3	46.7	51.1	46.9	65.0	56.5	43.9	51.4	46.9





Methodology

800
manufacturers

10
sectors

Index calculation

$$\begin{aligned} & \% \text{ 'Higher' } \\ & + \\ & (\% \text{ 'No change' }) / 2 \\ & + \\ & (\% \text{ 'Lower' }) \times 0 \end{aligned}$$

The Istanbul Chamber of Industry Türkiye Sector PMI® indices are compiled by S&P Global from responses to questionnaires sent to purchasing managers in a panel of around 800 manufacturers.

Survey responses are collected in the second half of each month and indicate the direction of change compared to the previous month.

The responses are aggregated for ten manufacturing sub-sectors defined by International Standard Industry Classification (ISIC) codes (see table, below for definitions).

For each sector, diffusion indices are calculated for each survey variable. The index is the sum of the percentage of 'higher' responses and half the percentage of 'unchanged' responses. The indices vary between 0 and 100, with a reading above 50 indicating an overall increase compared to the previous month, and below 50 an overall decrease. The indices are then seasonally adjusted.

The headline figure for each sector is the Purchasing Managers' Index™ (PMI). The PMI is a weighted average of the following five indices: New Orders (30%), Output (25%), Employment (20%), Suppliers' Delivery Times (15%) and Stocks of Purchases (10%). For the PMI calculation the Suppliers' Delivery Times Index is inverted so that it moves in a comparable direction to the other indices.

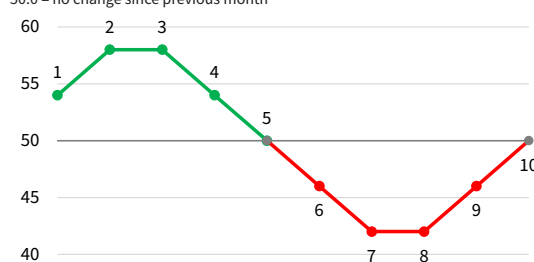
Underlying survey data are not revised after publication, but seasonal adjustment factors may be revised from time to time as appropriate which will affect the seasonally adjusted data series.

For further information on the PMI survey methodology, please contact economics@spglobal.com.

Survey questions	
Output	Quantity of purchases
New orders	Suppliers' delivery times
New export orders	Stocks of purchases
Employment	Input prices
Backlogs of work	Output prices
Stocks of finished goods	

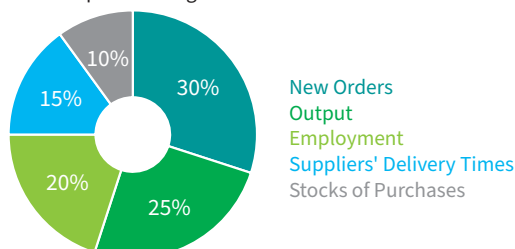
Index interpretation

50.0 = no change since previous month



1 Growth	6 Decline, from no change
2 Growth, faster rate	7 Decline, faster rate
3 Growth, same rate	8 Decline, same rate
4 Growth, slower rate	9 Decline, slower rate
5 No change, from growth	10 No change, from decline

PMI component weights



Sector coverage

Türkiye Sector PMI data include responses from companies defined by the following International Standard Industry Classification (ISIC) Rev.4 codes:

Food Products

C10 - Food Products

Textile Products

C13 - Textiles

Clothing & Leather Products

C14 - Wearing Apparel

C15 - Leather and Related Products

Wood & Paper Products

C16 - Wood and of Products of Wood and Cork, Except Furniture; Articles of Straw and Plaiting Materials

C17 - Paper and Paper Products

C18 - Printing and Reproduction of Recorded Media

C31 - Furniture

Chemicals, Plastics & Rubber Products

C20 - Chemicals and Chemical Products

C21 - Basic Pharmaceutical Products and Pharmaceutical Preparations

C22 - Rubber and Plastic Products

Non-metallic Mineral Products

C23 - Other Non-Metallic Mineral Products

Basic Metals

C24 - Basic Metals

Machinery, Equipment & Metal Products

C25 - Fabricated Metal Products, Except Machinery and Equipment

C28 - Machinery and Equipment N.E.C.

Electrical & Electronic Equipment

C26 - Computer, Electronic and Optical Products

C27 - Electrical Equipment

Land & Sea Vehicles

C29 - Motor Vehicles, Trailers and Semi-Trailers

C30 - Other Transport Equipment (excluding C303 Air and Spacecraft)



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Driving strength from her members' contributions to Turkish economy and since her foundation in 1952, Istanbul Chamber of Industry (ICI) stands out as Türkiye's largest chamber of industry and one of the most powerful representatives of Turkish industry.

The added value generated by ICI members represents more than 40% of the total added value propagated by Turkish industry. ICI members actualize approximately 35% of production of Turkish industry. 36% of Türkiye's Top 500 Industrial Enterprises consists of ICI members.

ICI promotes the sustainable development of Turkish industry and contributes the improvement of her competitiveness via offering innovative services to her members. For this purpose, she develops new projects and services to the use of industrialists in crucial fields such as; innovation, technology development, university-industry cooperation, vocational training, international relations, environment and energy with local and international partnerships.

Generating and conducting economic researches together with gathering data, ICI holds the widest knowledge on Istanbul industry whilst giving direction to Turkish industrialists and providing intense contribution for shaping economic and industrial policies.

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About PMI

Purchasing Managers' Index™ (PMI®) surveys are now available for over 40 countries and also for key regions including the eurozone. They are the most closely watched business surveys in the world, favoured by central banks, financial markets and business decision makers for their ability to provide up-to-date, accurate and often unique monthly indicators of economic trends.

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