



CONTEXT TRKİYE DİSTRİBTR PAZAR VERİLERİ  
Erol KUSEYRİ / lke Mdr





- CONTEXT HAKKINDA
- CONTEXT TÜRKİYE ÖYKÜSÜ
- GLOBAL DİSTRİBÜTÖR PAZAR VERİLERİ
- TÜRKİYE PANEL VERİLERİ
- FIRSATLAR



**BETTER TOGETHER**



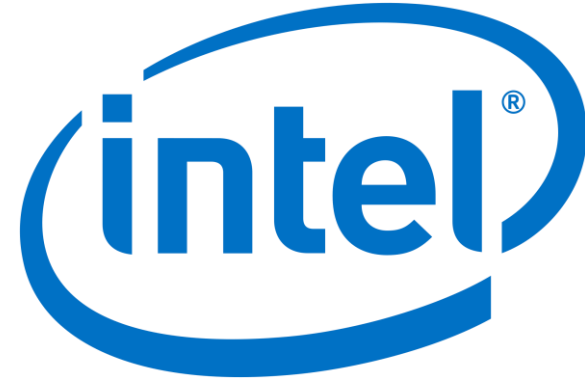
## CONTEXT Veritabanı Hakkında

İstisnasız **Dünya'nın en geniş**  
BT Distribütörleri satış  
veritabanına sahibiz.



- ✓ 98.2 milyar \$ ciro
- ✓ 1.7 milyar satış adedi









Distribütör panel sözleşmesi

**NDA**



Sıkı gizlilik kuralları uygulanır

**3/75%**



Özel alanlar korunur

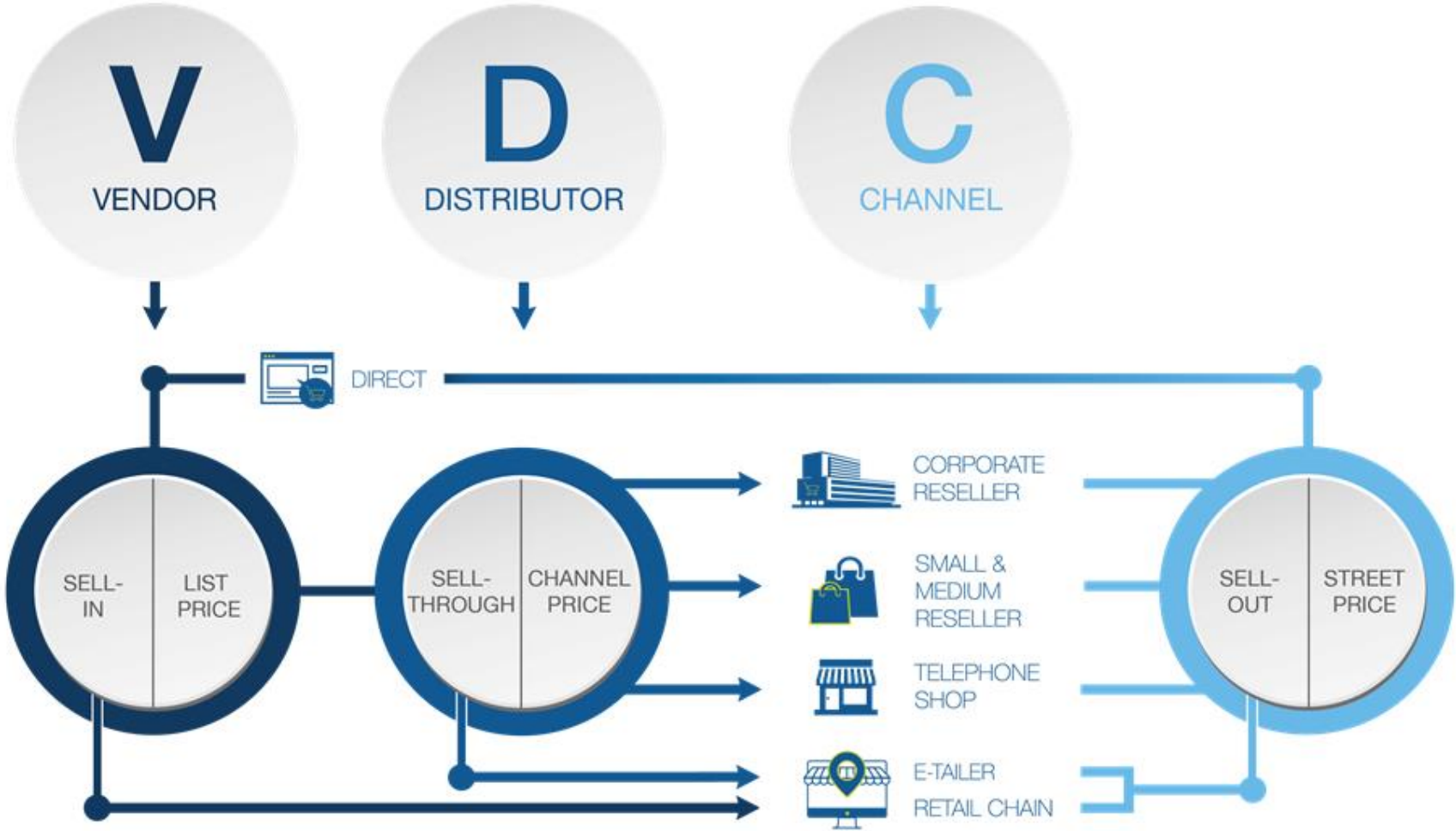
**'Others' kategorisi**



Dosya aktarım güvenliği

**256bit sFTP**





CONTEXT TÜRKİYE

- Global Shipment (Sell-In)
- Distributor Panel (Sell-Through)
- Retail Panel (Sell-Out)



2013/4

2013 / 11

2014/03

2014

2015

2016

2017-2018

2019/2

CONTEXT  
TÜRKİYE



İlk  
Raporun  
Üretilmesi



Yeni Distribütörler



Yeni Distribütörler



Yeni Distribütörler

- Düzenli raporlama
- Gaming Raporu
- ChannelWatch Anketi

Yeni Distribütörler







2017 → 17.6 mia \$  
2018 → 19.0 mia \$  
**+%7.7**



2017 → 14.1 mia \$  
2018 → 15.9 mia \$  
**+%12.5**



2017 → 7.6 mia \$  
2018 → 8.7 mia \$  
**+%15.2**



2017 → 8.0 mia \$  
2018 → 8.5 mia \$  
**+%6.1**



2017 → 7.5 mia \$  
2018 → 8.2 mia \$  
**+%10.0**

5.4 mia \$ ← 2017  
6.1 mia \$ ← 2018  
**+%13.2**



3.9 mia \$ ← 2017  
4.1 mia \$ ← 2018  
**+%5.4**



3.3 mia \$ ← 2017  
3.6 mia \$ ← 2018  
**+%7.5**



3.1 mia \$ ← 2017  
2.8 mia \$ ← 2018  
**-%9.3**



2.5 mia \$ ← 2017  
2.6 mia \$ ← 2018  
**+%2.9**





# Almanya IT Distribütörleri Pazar Verileri // Largest Market in CONTEXT Panel



2017 → 17.5 mia \$

2018 → 18.9 mia \$

**+%7.7**

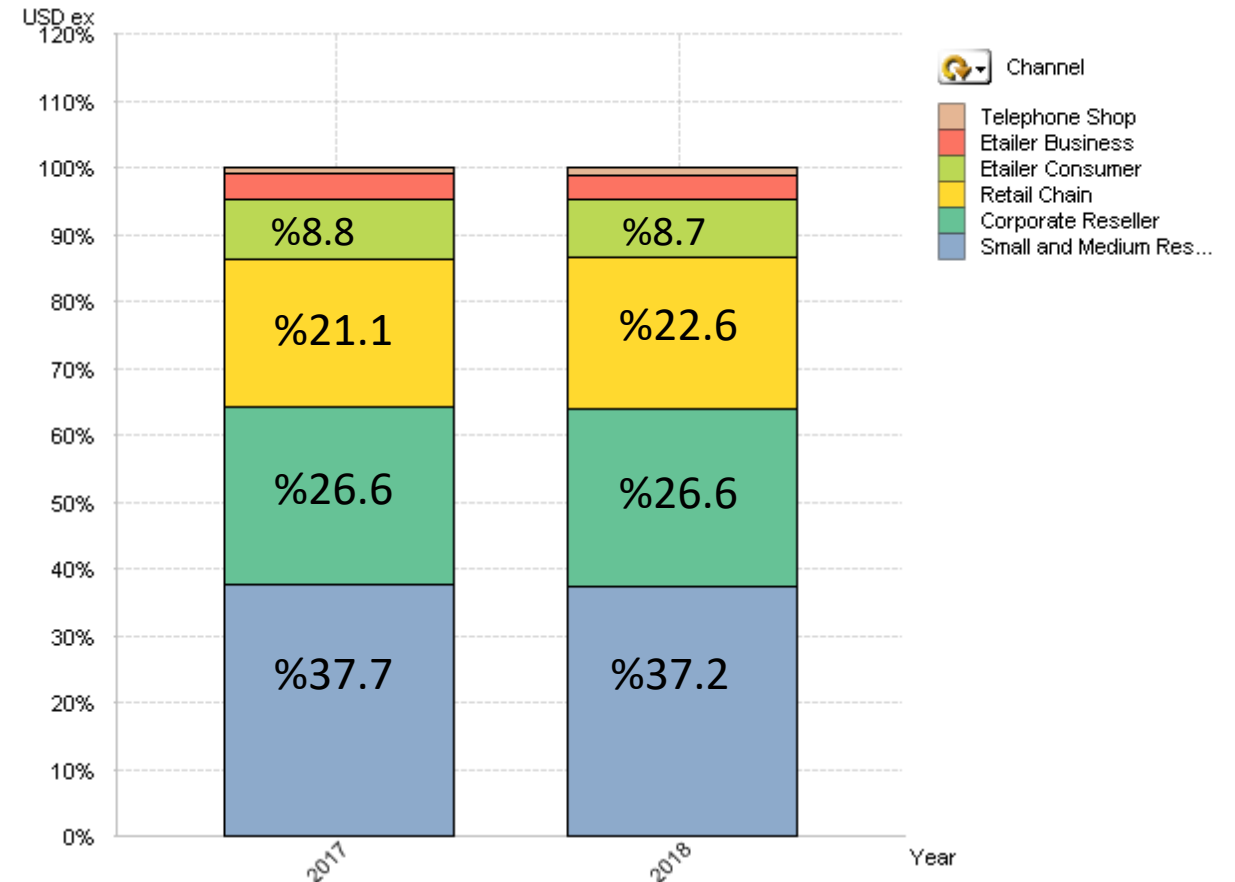
TOP5 kategori  
7 milyar\$  
%37

TOP10 kategori  
10 milyar\$  
%53.2

| Category                                      | 2017            | 2018            | YoY%   |
|-----------------------------------------------|-----------------|-----------------|--------|
| 1 Notebooks                                   | \$2.331.914.530 | \$2.409.150.480 | 3,2%   |
| 2 Smartphones                                 | \$1.906.072.971 | \$2.123.373.224 | 10,2%  |
| 3 Warranties and Services                     | \$785.310.854   | \$877.768.956   | 10,5%  |
| 4 Toner                                       | \$865.607.658   | \$842.494.580   | -2,7%  |
| 5 Tablet PCs                                  | \$639.397.515   | \$731.447.412   | 12,6%  |
| 6 Desktops                                    | \$632.263.900   | \$692.810.006   | 8,7%   |
| 7 Ink Cartridges and Tanks                    | \$638.216.568   | \$636.882.451   | -0,2%  |
| 8 Monitors                                    | \$557.946.174   | \$614.234.230   | 9,2%   |
| 9 Hard Disk Drives (HDDs)                     | \$600.732.049   | \$583.374.417   | -3,0%  |
| 10 Solid State Drives (SSDs)                  | \$507.123.398   | \$544.880.911   | 6,9%   |
| 11 Processors                                 | \$454.267.256   | \$491.640.184   | 7,6%   |
| 12 Network Switches                           | \$405.339.134   | \$424.246.867   | 4,5%   |
| 13 Data Management Software                   | \$402.603.395   | \$407.378.409   | 1,2%   |
| 14 RAM Memory                                 | \$359.687.856   | \$390.538.566   | 7,9%   |
| 15 Office Applications Software               | \$340.170.388   | \$343.954.189   | 1,1%   |
| 16 Other                                      | \$242.599.669   | \$331.286.138   | 26,8%  |
| 17 Servers (PC/Mac)                           | \$297.835.590   | \$322.851.633   | 7,7%   |
| 18 Security Software                          | \$257.566.661   | \$302.220.469   | 14,8%  |
| 19 Operating Systems Software                 | \$290.011.303   | \$276.560.205   | -4,9%  |
| 20 Graphics and Design Software               | \$193.338.865   | \$231.606.116   | 16,5%  |
| 21 Network Routers                            | \$228.963.497   | \$231.418.291   | 1,1%   |
| 22 All-in-One Lasers                          | \$218.315.455   | \$224.111.618   | 2,6%   |
| 23 Graphics Cards                             | \$213.219.985   | \$212.515.909   | -0,3%  |
| 24 Disk Arrays                                | \$157.510.788   | \$204.196.625   | 22,9%  |
| 25 All-In-One Inkjets                         | \$192.380.574   | \$202.356.235   | 4,9%   |
| 26 Other Software and Licences                | \$245.088.474   | \$196.776.180   | -24,6% |
| 27 Headsets/Headphones and Microphones        | \$115.855.623   | \$188.399.493   | 38,5%  |
| 28 Wireless Access Points                     | \$163.761.566   | \$176.852.076   | 7,4%   |
| 29 Network Management and Security Appliances | \$149.050.543   | \$150.788.330   | 1,2%   |



Panel Revenue %Share by Channel



# İtalya IT Distribütörleri Pazar Verileri // The most growing Market in CONTEXT Panel



2017 → 7.6 mia \$

2018 → 8.7 mia \$

**+%15.2**

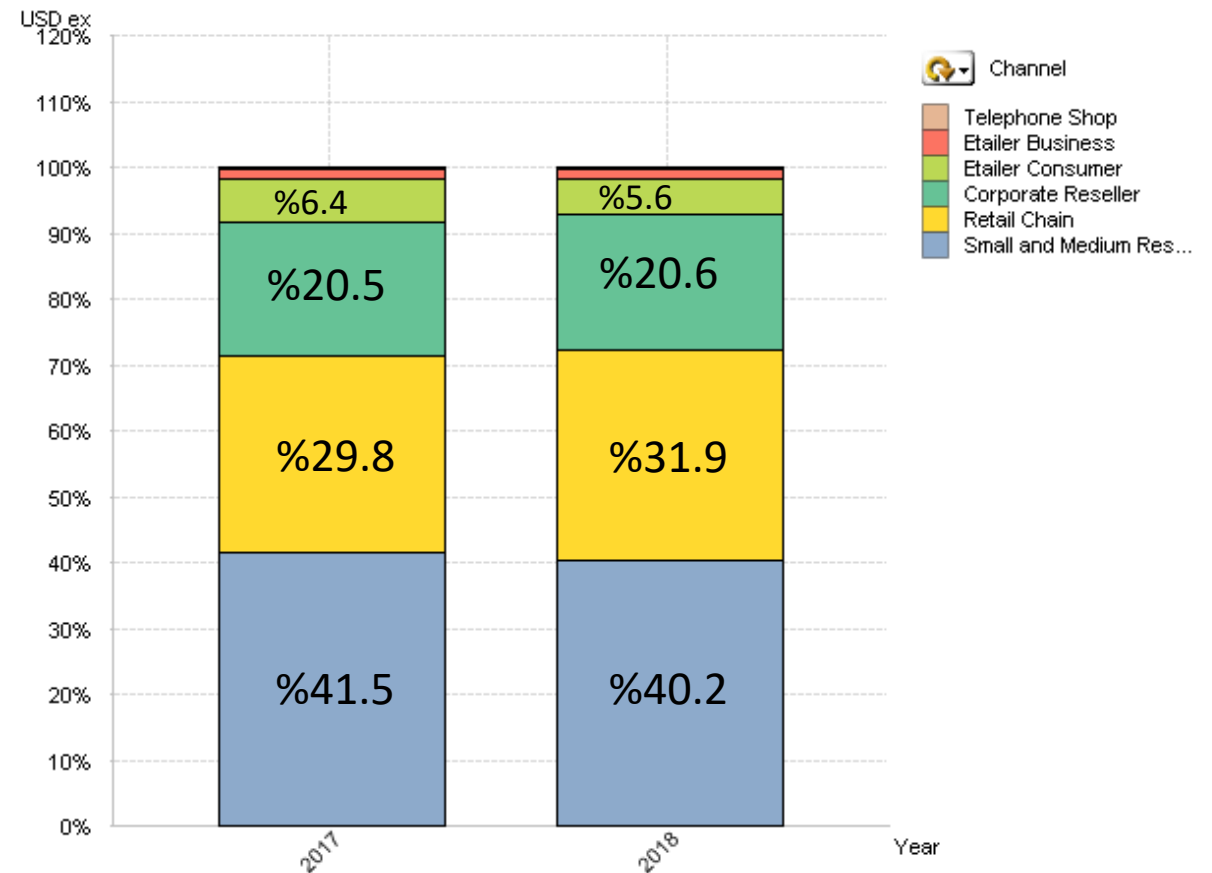
TOP5 kategori  
4 milyar\$  
%47

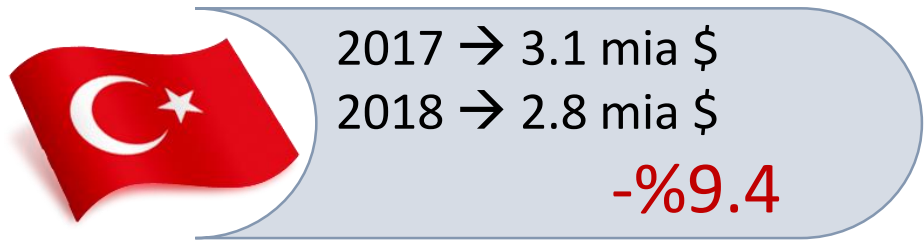
TOP10 kategori  
5.3 milyar\$  
%61

| Category                               | 2017            | 2018            | YoY%   |
|----------------------------------------|-----------------|-----------------|--------|
| 1 Smartphones                          | \$1.381.770.167 | \$1.770.964.807 | 28,2%  |
| 2 Notebooks                            | \$1.068.761.784 | \$1.161.191.025 | 8,6%   |
| 3 Desktops                             | \$407.088.641   | \$419.836.397   | 3,1%   |
| 4 Warranties and Services              | \$325.455.822   | \$372.276.221   | 14,4%  |
| 5 Tablet PCs                           | \$317.705.040   | \$352.410.698   | 10,9%  |
| 6 Ink Cartridges and Tanks             | \$328.509.601   | \$351.986.292   | 7,1%   |
| 7 Toner                                | \$330.808.844   | \$344.256.346   | 4,1%   |
| 8 Monitors                             | \$159.301.179   | \$193.425.880   | 21,4%  |
| 9 Televisions                          | \$169.137.615   | \$192.968.461   | 14,1%  |
| 10 Other                               | \$115.675.560   | \$192.786.845   | 66,7%  |
| 11 Servers (PC/Mac)                    | \$107.727.018   | \$157.610.259   | 46,3%  |
| 12 Solid State Drives (SSDs)           | \$140.093.692   | \$149.551.652   | 6,8%   |
| 13 Data Management Software            | \$99.716.071    | \$143.738.873   | 44,1%  |
| 14 Security Software                   | \$121.799.200   | \$133.926.165   | 10,0%  |
| 15 Office Applications Software        | \$108.764.796   | \$122.938.943   | 13,0%  |
| 16 Hard Disk Drives (HDDs)             | \$111.198.749   | \$116.777.099   | 5,0%   |
| 17 Network Switches                    | \$110.309.227   | \$116.190.652   | 5,3%   |
| 18 Operating Systems Software          | \$91.115.674    | \$112.906.584   | 23,9%  |
| 19 All-In-One Inkjets                  | \$83.460.563    | \$102.542.920   | 22,9%  |
| 20 All-in-One Lasers                   | \$88.317.173    | \$96.040.787    | 8,7%   |
| 21 RAM Memory                          | \$83.849.442    | \$94.832.754    | 13,1%  |
| 22 Headsets/Headphones and Microphones | \$44.016.558    | \$88.291.836    | 100,6% |
| 23 Processors                          | \$80.316.672    | \$87.147.729    | 8,5%   |
| 24 Graphics and Design Software        | \$65.432.272    | \$81.513.021    | 24,6%  |
| 25 Other Software and Licences         | \$60.612.190    | \$78.606.234    | 29,7%  |
| 26 Desktop Workstations (PC/Mac)       | \$52.101.691    | \$70.052.907    | 34,5%  |
| 27 Disk Arrays                         | \$49.015.507    | \$67.687.911    | 38,1%  |
| 28 Database Management Software        | \$62.649.001    | \$66.961.803    | 6,9%   |
| 29 Large Format Displays               | \$57.117.550    | \$65.401.182    | 14,5%  |
| 30 Smartphone Accessories              | \$44.325.727    | \$62.507.211    | 41,0%  |



Panel Revenue %Share by Channel





| YIL  | İLK 6 AY        | SON 6 AY        | TÜM YIL         |
|------|-----------------|-----------------|-----------------|
| 2017 | \$1.351.127.044 | \$1.746.900.001 | \$3.098.027.045 |
| 2018 | \$1.577.045.623 | \$1.229.420.239 | \$2.806.465.862 |
| YoY% | 16,7%           | -29,6%          | -9,4%           |

| Quarter   | Q1            | Q2            | Q3             | Q4              |
|-----------|---------------|---------------|----------------|-----------------|
| 2017      | \$703.419.435 | \$647.707.609 | \$718.090.821  | \$1.028.809.180 |
| 2018      | \$889.547.360 | \$687.498.263 | \$520.363.457  | \$709.056.782   |
| YoY Farkı | \$186.127.925 | \$39.790.654  | -\$197.727.364 | -\$319.752.398  |
| Toplam    | \$225.918.579 |               | -\$517.479.762 |                 |



## Türkiye IT Distribütörleri Pazar Verileri // Turkey IT Market in CONTEXT Panel

| Category                               | 2017          | 2018          | YoY%   |
|----------------------------------------|---------------|---------------|--------|
| 1 Notebooks                            | \$741.362.391 | \$693.668.556 | -6,4%  |
| 2 Smartphones                          | \$877.655.636 | \$689.398.707 | -21,4% |
| 3 Desktops                             | \$180.052.352 | \$151.452.715 | -15,9% |
| 4 Servers (PC/Mac)                     | \$48.572.586  | \$95.822.002  | 97,3%  |
| 5 Other                                | \$59.929.014  | \$73.433.272  | 22,5%  |
| 6 Hard Disk Drives (HDDs)              | \$103.030.120 | \$68.424.444  | -33,6% |
| 7 Disk Arrays                          | \$58.415.005  | \$64.330.153  | 10,1%  |
| 8 Tablet PCs                           | \$62.229.347  | \$57.907.200  | -6,9%  |
| 9 Monitors                             | \$62.505.099  | \$57.647.736  | -7,8%  |
| 10 Warranties and Services             | \$71.959.064  | \$50.899.330  | -29,3% |
| 11 Toner                               | \$53.544.271  | \$45.454.668  | -15,1% |
| 12 Processors                          | \$46.611.303  | \$41.978.513  | -9,9%  |
| 13 Network Switches                    | \$44.493.383  | \$40.799.237  | -8,3%  |
| 14 Solid State Drives (SSDs)           | \$40.993.482  | \$35.855.006  | -12,5% |
| 15 All-In-One Inkjets                  | \$36.728.568  | \$34.529.973  | -6,0%  |
| 16 Ink Cartridges and Tanks            | \$32.957.628  | \$32.980.785  | 0,1%   |
| 17 Office Applications Software        | \$32.534.387  | \$29.663.917  | -8,8%  |
| 18 All-in-One Lasers                   | \$32.692.972  | \$26.037.224  | -20,4% |
| 19 RAM Memory                          | \$27.735.498  | \$25.884.402  | -6,7%  |
| 20 Desktop Workstations (PC/Mac)       | \$18.322.967  | \$25.867.866  | 41,2%  |
| 21 Other Software and Licences         | \$17.691.158  | \$21.279.293  | 20,3%  |
| 22 Operating Systems Software          | \$24.261.409  | \$19.969.005  | -17,7% |
| 23 Network Accessories                 | \$4.856.900   | \$19.417.548  | 299,8% |
| 24 Integrated Systems                  | \$12.683.809  | \$19.392.746  | 52,9%  |
| 25 Network Routers                     | \$24.229.784  | \$19.248.727  | -20,6% |
| 26 Network Expansion Modules           | \$9.105.463   | \$18.580.720  | 104,1% |
| 27 USB Memory                          | \$14.285.513  | \$16.864.162  | 18,1%  |
| 28 Network Management Software         | \$14.303.807  | \$16.504.021  | 15,4%  |
| 29 Laser Printers                      | \$18.792.747  | \$15.383.282  | -18,1% |
| 30 Headsets/Headphones and Microphones | \$9.118.956   | \$15.340.864  | 68,2%  |

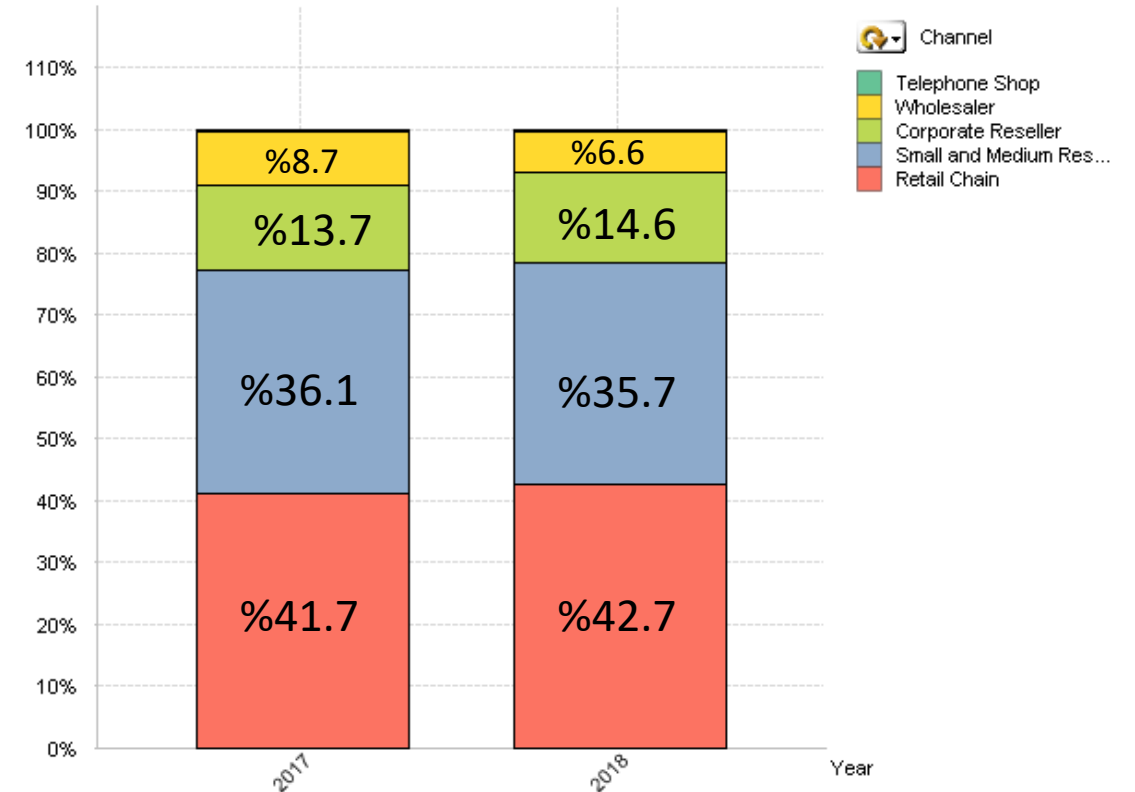
TOP5 kategori  
1.7 milyar\$  
%60

TOP10 kategori  
2 milyar\$  
%71.3



Panel Revenue %Share by Channel

USD ex



| Country      | Category       | 2017             | 2018             |
|--------------|----------------|------------------|------------------|
| Germany      | Smartphones    | \$1.906.130.413  | \$2.123.196.013  |
|              | All Categories | \$17.591.567.241 | \$18.947.411.496 |
|              |                | 10,8%            | 11,2%            |
| Italy        | Smartphones    | \$1.381.781.130  | \$1.771.023.500  |
|              | All Categories | \$7.617.735.220  | \$8.774.047.533  |
|              |                | 18,1%            | 20,2%            |
| Russia       | Smartphones    | \$1.018.130.315  | \$1.267.028.995  |
|              | All Categories | \$8.063.574.769  | \$8.612.573.062  |
|              |                | 12,6%            | 14,7%            |
| UK & Ireland | Smartphones    | \$1.271.011.916  | \$1.232.380.927  |
|              | All Categories | \$14.144.358.352 | \$15.905.600.788 |
|              |                | 9,0%             | 7,7%             |
| Spain        | Smartphones    | \$844.111.483    | \$1.135.740.748  |
|              | All Categories | \$5.409.364.183  | \$6.126.051.427  |
|              |                | 15,6%            | 18,5%            |
| France       | Smartphones    | \$779.759.588    | \$1.034.977.831  |
|              | All Categories | \$7.529.315.935  | \$8.271.803.262  |
|              |                | 10,4%            | 12,5%            |
| Poland       | Smartphones    | \$634.126.206    | \$709.823.100    |
|              | All Categories | \$3.932.679.981  | \$4.145.435.717  |
|              |                | 16,1%            | 17,1%            |
| Turkey       | Smartphones    | \$877.655.636    | \$689.432.718    |
|              | All Categories | \$3.098.032.065  | \$2.808.555.198  |
|              |                | 28,3%            | 24,5%            |

Türkiye İstatistik Kurumu - Cep telefonu ithalatında geçen yıl bir önceki yıla göre %30'luk düşüş yaşandı.

### İTHAL CEP TELEFONU

2018 9 milyon 820 bin 192 adet

2017 12 milyon 189 bin 655 adet

| Category    | Country      | 2017      | 2018      |
|-------------|--------------|-----------|-----------|
| Smartphones | Russia       | 7.076.845 | 8.119.016 |
| Smartphones | Italy        | 4.918.927 | 5.071.781 |
| Smartphones | Germany      | 5.442.118 | 5.034.204 |
| Smartphones | Spain        | 2.795.388 | 3.475.566 |
| Smartphones | UK & Ireland | 3.289.047 | 3.393.901 |
| Smartphones | France       | 1.837.247 | 2.506.355 |
| Smartphones | Poland       | 2.545.215 | 2.320.199 |
| Smartphones | Turkey       | 1.565.928 | 1.338.236 |
| Smartphones | Sweden       | 1.247.843 | 1.313.381 |

## Türkiye IT Distribütörleri Pazar Verileri // Turkey IT Market in CONTEXT Panel

| Country      | Category       | 2017             | 2018             |
|--------------|----------------|------------------|------------------|
| Germany      | Notebooks      | \$2.331.914.655  | \$2.409.486.497  |
|              | All Categories | \$17.591.567.241 | \$18.947.411.496 |
|              |                | 13,3%            | 12,7%            |
| UK & Ireland | Notebooks      | \$1.714.788.760  | \$1.976.085.884  |
|              | All Categories | \$14.144.358.352 | \$15.905.600.788 |
|              |                | 12,1%            | 12,4%            |
| Russia       | Notebooks      | \$1.403.841.920  | \$1.405.382.020  |
|              | All Categories | \$8.063.574.769  | \$8.612.573.062  |
|              |                | 17,4%            | 16,3%            |
| Italy        | Notebooks      | \$1.068.761.784  | \$1.161.277.995  |
|              | All Categories | \$7.617.735.220  | \$8.774.047.533  |
|              |                | 14,0%            | 13,2%            |
| Spain        | Notebooks      | \$944.487.102    | \$997.580.363    |
|              | All Categories | \$5.409.364.183  | \$6.126.051.427  |
|              |                | 17,5%            | 16,3%            |
| France       | Notebooks      | \$814.818.756    | \$838.096.535    |
|              | All Categories | \$7.529.315.935  | \$8.271.803.262  |
|              |                | 10,8%            | 10,1%            |
| Poland       | Notebooks      | \$761.380.839    | \$734.940.099    |
|              | All Categories | \$3.932.679.981  | \$4.145.435.717  |
|              |                | 19,4%            | 17,7%            |
| Turkey       | Notebooks      | \$741.362.391    | \$693.823.450    |
|              | All Categories | \$3.098.032.065  | \$2.808.555.198  |
|              |                | 23,9%            | 24,7%            |

## Cironun Marka Dağılımı

| Country      | Industry Sector  | Category  | Vendor | Y | 2017          | 2018          |
|--------------|------------------|-----------|--------|---|---------------|---------------|
| <b>Total</b> |                  |           |        |   | <b>100.0%</b> | <b>100.0%</b> |
| Turkey       | Mobile Computing | Notebooks | Lenovo |   | 36.2%         | 39.2%         |
|              |                  |           | HP     |   | 21.0%         | 22.2%         |
|              |                  |           | Asus   |   | 20.4%         | 14.8%         |
|              |                  |           | Dell   |   | 7.1%          | 8.3%          |
|              |                  |           | Acer   |   | 4.5%          | 4.1%          |
|              |                  |           | Other  |   | 10.7%         | 11.4%         |

## Satış Adetleri – 1.075K / 819K

| Country      | Industry Sector  | Category  | Vendor | Y | 2017          | 2018          |
|--------------|------------------|-----------|--------|---|---------------|---------------|
| <b>Total</b> |                  |           |        |   | <b>100.0%</b> | <b>100.0%</b> |
| Turkey       | Mobile Computing | Notebooks | Lenovo |   | 35.9%         | 38.8%         |
|              |                  |           | HP     |   | 23.7%         | 26.9%         |
|              |                  |           | Asus   |   | 21.9%         | 15.3%         |
|              |                  |           | Dell   |   | 6.7%          | 6.7%          |
|              |                  |           | Acer   |   | 6.8%          | 5.9%          |
|              |                  |           | Other  |   | 5.0%          | 6.5%          |





# GELECEK ÇOK YAKIN

- ✓ öğrenen makineler [learning machine]
- ✓ robot teknolojisi [robots]
- ✓ hologram teknolojisi [hologram technology]
- ✓ akıllı ev/şehir sistemleri [smart home/city]
- ✓ yapay zeka [artificial intelligence]
- ✓ blok zincir [block chain]
- ✓ veri analitiği [data analytics]
- ✓ siber güvenlik [cyber security]



- tüketici ürünleri [consumer products]
- otonom robotlar [autonom robots]
- drones
- diğer endüstriyel robotlar [other industrial robots]



Bazı Önemli Market Oyuncuları [Key Market Players] :



THE  
ROBOT  
GARAGE

**ROBOTIS**  
We Provide Creativity

**KAWADA**  
Robotics



**UBTECH**  
Dream With Robots



ENGINEERED  
ARTS

**DST** Robot

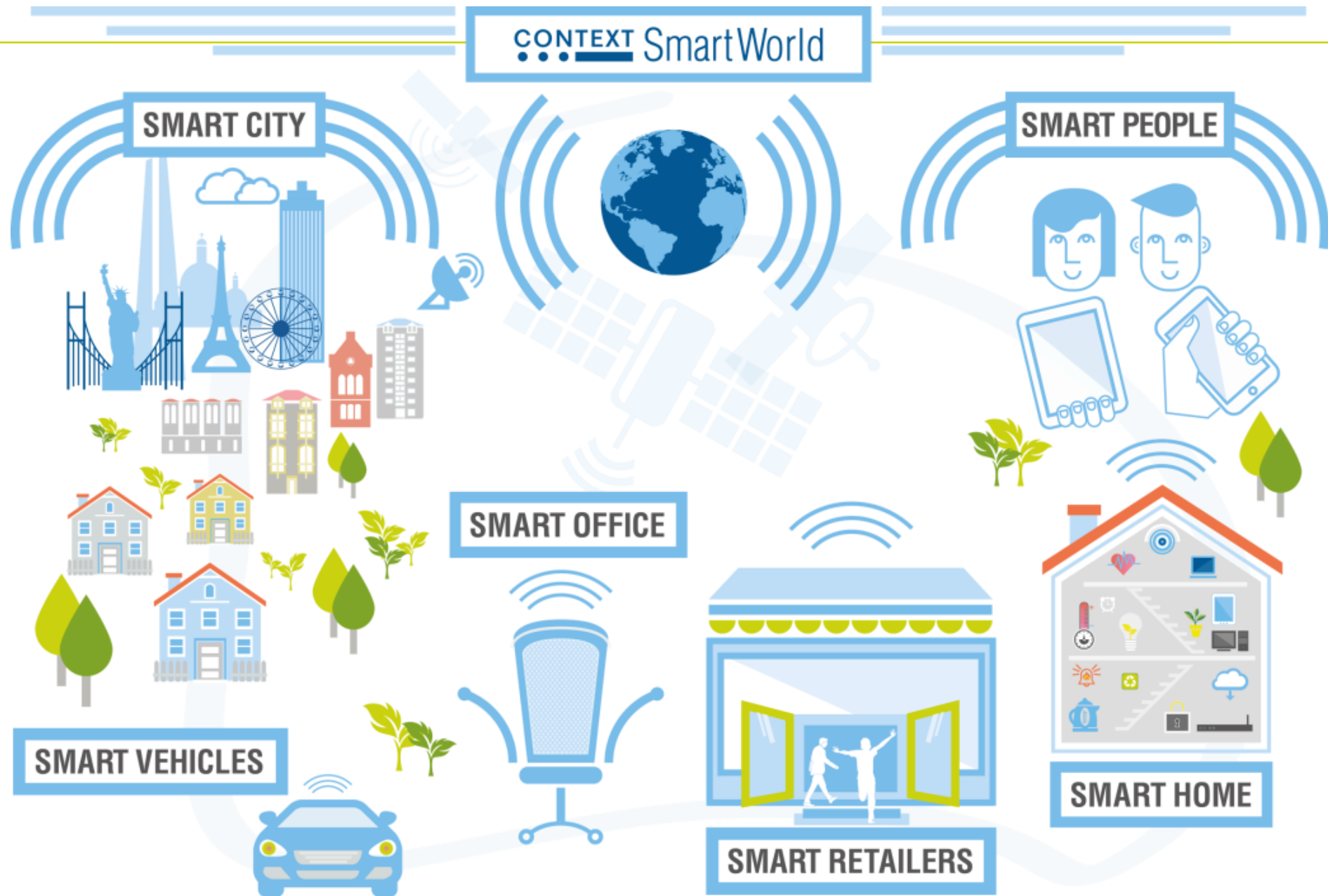
**TOYOTA**

**HANSON**  
ROBOTICS

**İnsansı robot pazarı [humanoid robot market]**

2017 → 320 milyon\$

2023 → 3,9 milyar\$



# Akıllı Ev/Şehir [Smart Home/City]

- güvenlik ürünleri [security products]
- kontrol ve bağlanılabilirlik [control and connectivity]
- ev eğlence ürünleri [home entertainment products]
- konfor ve aydınlatma ürünleri [comfort and lighting]
- enerjinin yönetimi [energy management]

| ENDÜSTRİ             | KATEGORİLER                                        | 2017          | 2018          | YoY%    |
|----------------------|----------------------------------------------------|---------------|---------------|---------|
| Giyilebilir Cihazlar | Akıllı Saatler                                     | \$258.915.800 | \$414.792.304 | 60,2%   |
|                      | Akıllı Bantlar ve Aktivite Kaydediciler            | \$237.952.288 | \$170.051.467 | -28,5%  |
|                      | Akıllı Gözlük                                      | \$388.235     | \$541.837     | 39,6%   |
| Akıllı Ev ve Ofis    | Akıllı Ev Otomasyonu                               | \$47.844.458  | \$99.516.233  | 108,0%  |
|                      | Akıllı Aydınlatma ve Elektrik                      | \$27.773.351  | \$30.093.338  | 8,4%    |
|                      | Akıllı Güvenlik, Kontrol Erişimi ve Yardımlı Yaşam | \$10.596.360  | \$17.584.288  | 65,9%   |
|                      | Akıllı Enerji                                      | \$14.331.595  | \$9.227.927   | -35,6%  |
|                      | Akıllı Ev Cihazları Aksesuar ve Parçaları          | \$5.704.712   | \$3.943.259   | -30,9%  |
|                      | Akıllı Ev Aletleri                                 | \$291.305     | \$299.625     | 2,9%    |
|                      | Akıllı Sağlık Cihazları                            | \$7.080.743   | \$3.904.270   | -44,9%  |
| e-Sağlık Cihazları   | Akıllı Teraziler                                   | \$1.444.200   | \$3.440.848   | 138,3%  |
|                      | Akıllı Tansiyon Ölçerler                           | \$212.022     | \$105.781     | -50,1%  |
|                      | Akıllı Uyku Sistemleri                             | \$15.011      |               | -100,0% |
| Toplam               |                                                    | \$612.550.078 | \$753.501.178 | 23,0%   |



## GENERAL SMART HOME SOLUTIONS



## PLATFORMS



## LIGHTING



## MONITORING & SECURITY



## ENERGY & UTILITIES



## WI-FI & CYBER SECURITY



## HEALTH & WELLNESS



## AUDIO & MEDIA



## SMART LOCKS



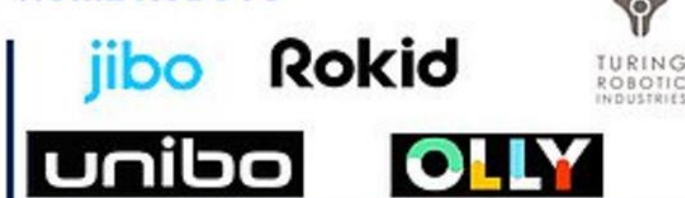
## KITCHEN & HOME APPLIANCES



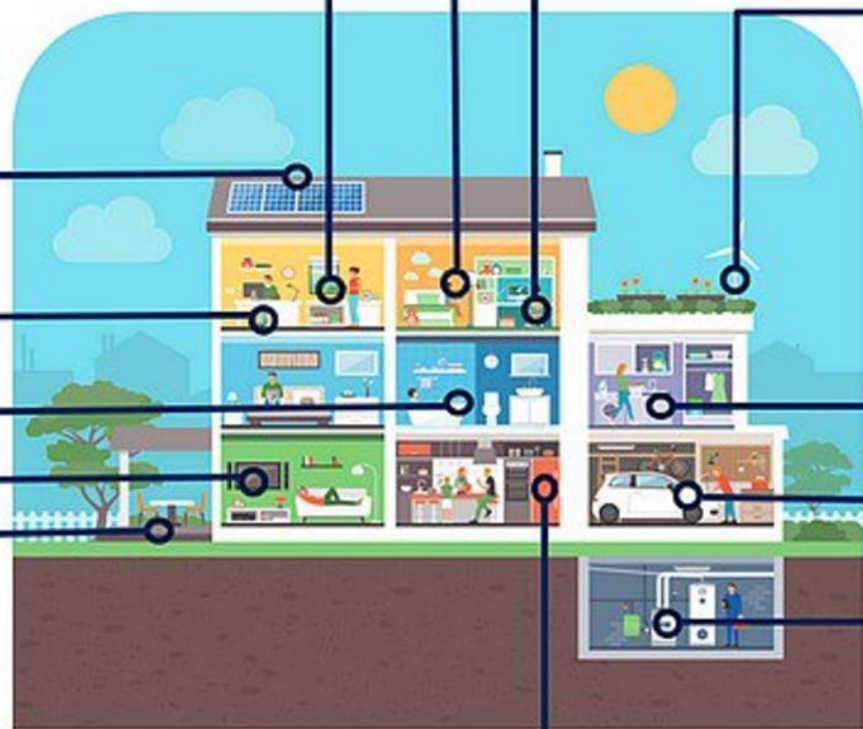
## MISCELLANEOUS



## HOME ROBOTS



## ALARM SYSTEMS







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# TEŞEKKÜRLER...

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