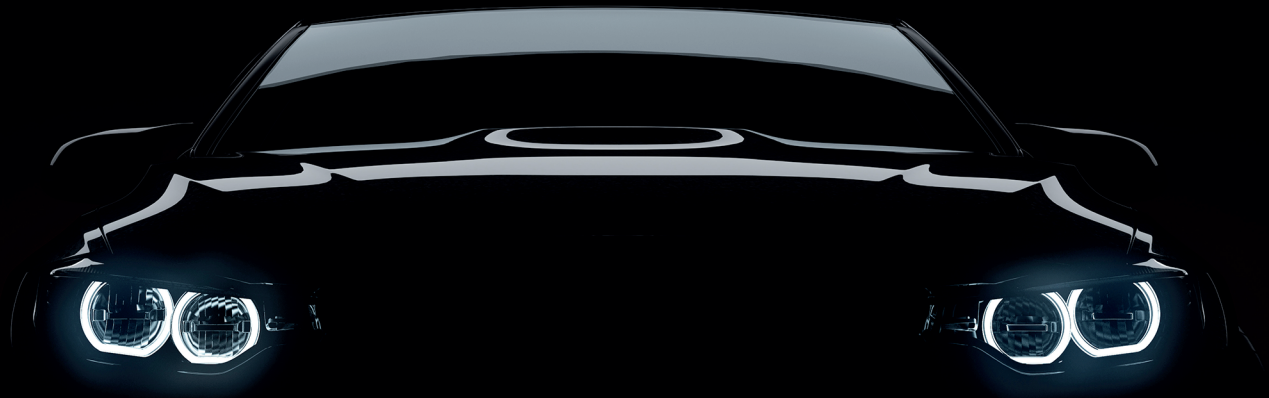


# POWER<sup>of</sup> Production



AUTOMOTIVE  
INDUSTRY  
EXPORTERS'  
ASSOCIATION

**OiB**

A photograph of an automotive manufacturing plant. In the foreground, two large orange robotic arms are positioned on either side of a car chassis. The arms are actively welding the chassis, with bright orange sparks flying from the point of contact. The car chassis is silver and is mounted on a conveyor system. In the background, more car chassis are visible, along with various industrial equipment and cables. The overall scene is a busy, modern automotive production environment.

# Automotive Industry Exporters' Association

OiB is Türkiye's main exporter association  
of the automotive industry

AUTOMOTIVE  
INDUSTRY  
EXPORTERS'  
ASSOCIATION

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# Automotive Industry Exporters' Association

Members : 9.500  
Export : 34,5 billion €



## Türkiye's three main sectors in exports (billion €)

Sector	2022	2023	2024	2024 share%
Automotive Industry	29,5	32,4	34,5	16,5
Chemicals and Chemical Products	30,8	28,8	28,5	13,6
Apparel	19,1	17,9	16,6	7,9



## Türkiye's automotive exports (billion €)

	Main Vehicle Manufacturer Industry	Supplier Components Manufacturer Industry	Total
2022	17,1	12,4	29,5
2023	19,4	13,0	32,4
2024	20,6	13,9	34,5



## 2022-2023-2024 production (units)

	2022	2023	2024
Passenger Cars	810.889	952.667	904.513
Commercial Vehicles	541.759	515.726	460.783
Truck	46.570	52.244	35.870
Pick Up	436.611	397.015	346.863
Bus	8.346	10.862	9.908
Minibus:	46.897	50.941	63.194
Midibus:	3.335	4.664	4.948
TOTAL	1.352.648	1.468.393	1.365.296

# Global player: Our supplier industry

Our globalising supplier industry exports 90% of its production both directly and through providing parts to locally manufactured vehicles

## Advanced Supplier Industry

**9.500** exporter SMEs

**200** foreign investors

**200.000** employees

**13,9 billion €** export in 2024

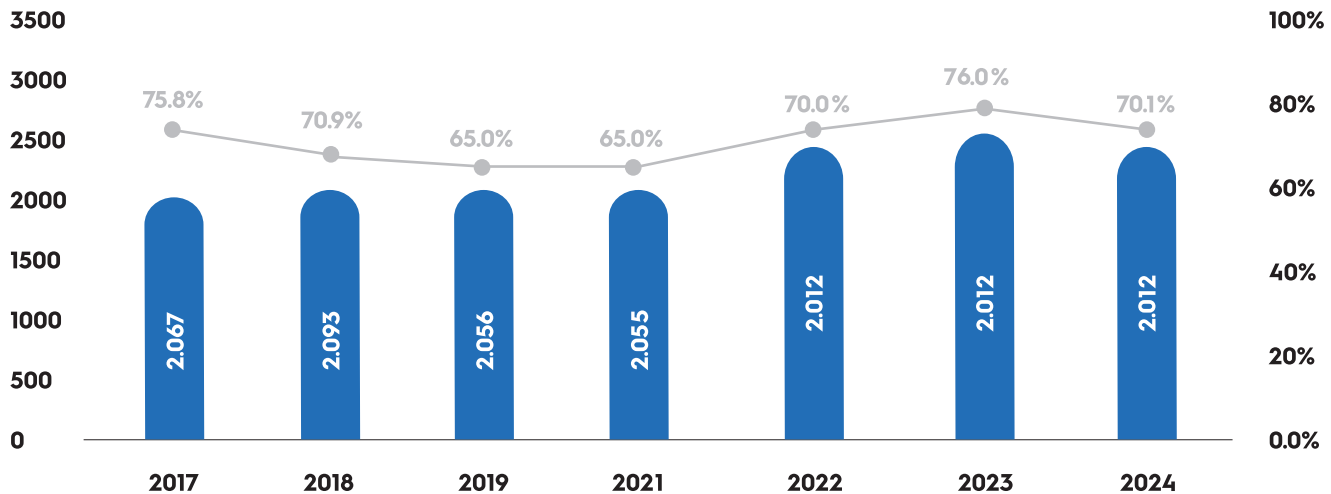
- Forging
- Casting
- Body panels
- Wheels
- Radiators
- Filters
- Springs
- Fuel injection parts
- Batteries
- Auto glasses
- Wiper systems
- Power-train parts
- Electrical equipment
- Lights-plastics, Filaments
- Engines-transmissions
- Chassis frame and parts
- Seating & inner trimming
- Suspension systems
- Various plastics parts
- Various aluminum parts
- Brake and clutch parts
- Hydraulic & pneumatic systems
- Fluid transfer system
- Exhaust system



### Supplier industry export (billion €)

	2022	2023	2024
Supplier Industry Total	12,4	13	13,9
Automotive Total	29,5	32,4	34,5
Supplier Industry Share %	42	40,1	40

## Production Capacity (x000) and Utilization



■ Production Capacity — Capacity utilization

## Türkiye - Strategic Location

- Türkiye is located at the center of 3 major markets
  - Europe, Middle-East and Central Asia
- Türkiye is a natural bridge between both East-West and North-South axes
- Türkiye offers easy access to 1.3 billion people and a combined market worth of USD 28 trillion GDP in Europe, MENA, and Central Asia within a 4-hour flight radius.

## ForeignDirect Investments

- Türkiye has a century-long tradition of hosting foreign investors and private entrepreneurs
- Around USD 262 billion of FDI during the 2003-2023 period
- Many multinational companies have production hubs in Türkiye, serving both for local market and export markets (mainly Eurozone)
- Türkiye has different incentives (investment, R&D,...)

# Leader in the Export

Nearly one-seventh of the total export is performed by the automotive industry



## Automotive Export by Product Group (billion €)

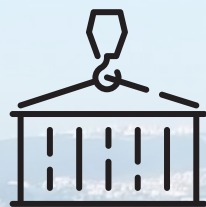
	2022	2023	2024	Share % (24)
Automotive Supplier Industry	12.4	13.0	13.9	40,0
Passenger Cars	9.5	11.1	11.5	33,2
Vehicles for the Transport of Goods	5.1	4.6	5.2	15,0
Bus Minibus Midibus	1.1	1.8	2.3	6,9
Road Tractors for Semi-Trailers	1.0	1.4	1.0	3,4
<b>Total</b>	<b>29,5</b>	<b>32,4</b>	<b>34,5</b>	<b>100</b>



## Automotive Export by Country (billion €)

Country	2022	2023	2024	Share 24 %
Germany	4.0	4.5	4.5	13,1
France	3.0	4.0	4.0	11,7
United Kingdom	3.0	3.0	3.8	11,1
Italy	2.1	2.8	3.2	9,3
Spain	1.5	2.0	2.3	6,8

The automotive industry performs 16,5 % of the total export



# Export

# 34,5 billion €

in 2024

**R&D Centers (2024)**

**Supplier Industry**

**OEM**

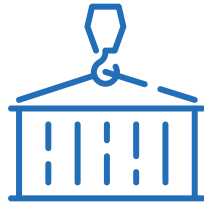
**Automotive design and engineering**

**: 137 companies**

**: 24 companies**

**: 6 companies**

# Main Export Markets



Germany



France



UK



Italy



Spain

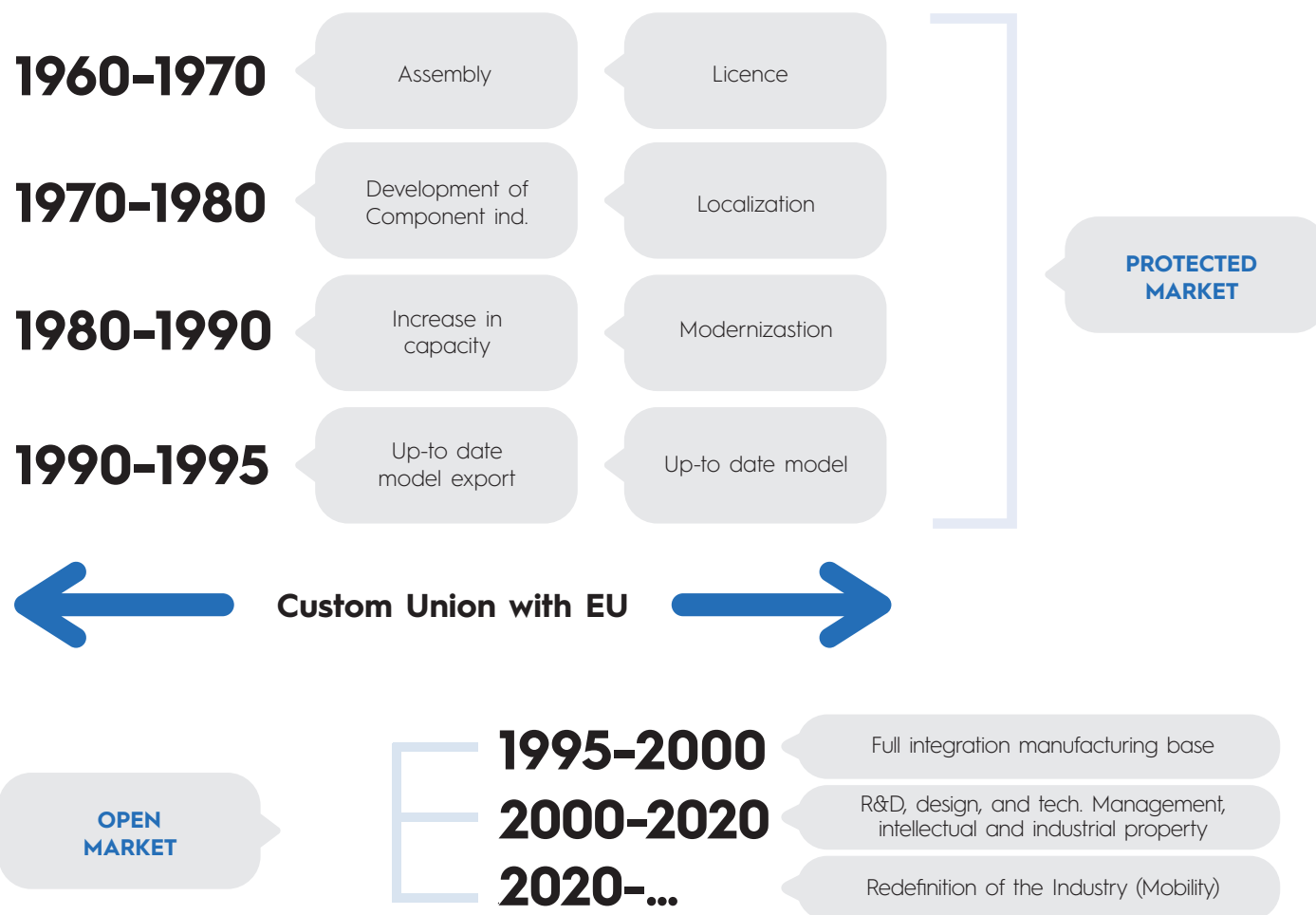
Exports to 200 Countries  
**Europe Share 81,5%**



**Export 74%**  
of total production



# Development of the Turkish Automotive Industry



## Turkish Automotive

The history of the Turkish automotive industry has a relatively brief past, but a powerful impact: the journey, starting from the mid-1950s and gaining momentum in the early 1960s, has reached a stunning standing point of thousands of companies, hundreds of thousands of recruitment numbers, high quality products and export championship.

Alongside passenger cars and light commercial vehicles, as to which Turkish manufacturers have become world production centers of global companies, Turkish supplier industry boasts ample potential for exports with its large capacity, and a wide variety of production and high standards.

## Industry Facts



Europe's 4<sup>th</sup> biggest vehicle producer



Annual export volume is 34,5 billion € (in 2024)



1.37 million vehicle production



13,9 billion € supplier industry export



9,500 manufacturers in supplier industry



Realizes 16,5% of Türkiye's export



81,5 % total exports to Europe



Export champion for 18 years in the last 19 years



Top export markets: Germany, France, UK, Italy, Spain



More than 200 foreign investors

## Top Exported Parts and Components

Engine Parts

Tyres and Tubes

Accessories for Bodies



Road Wheels and Parts



Rubber Parts for Motor Vehicles



Transmission Cranks and Shafts

All data provided are either as of or prior to 2024.



## Reasons Why You Should Prefer Turkish Automotive Industry

**01** High sense of quality

High production capacity **02**

**03** Wide product range

Qualified, well-trained, motivated labour force **04**

**05** High export potential

**06** Innovative design

High-level customer portfolio **07**

**08** Production at EU standards

Partnership with world-leading manufacturers **09**

**10** Automotive culture and supplier base

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