

Turkish Automotive

November 19, 2026

OİB
Automotive Industry Exporters' Association

Founded
1991

Member Companies
+2,500

Exports
$41,5 billion

Coordinator Association
of the automotive industry of Türkiye

Export volume increase

Foreign trade informing

Finding new markets

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OSD
Automotive Manufacturers Association of Türkiye

Founded
1974

2,2 million *units*
Annual Production Capacity
13 Members
17 *Production Facilities -* ***20*** *Brands*

~1.5 million *units*
Annual Production (2025)

Investment
€1.07 billion (2025)
8.9 Mil € in 10 Years

Direct Employment
~59,000 (2025)

18 *R&D Centers (OEM's)*
€263 million
R&D Exports (2025)

a member of OICA *LC member of*

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TAYSAD
Automotive Suppliers Association of Türkiye

Founded
1978

Member Companies
+530

Exports
€14.05 billion
213 Countries

Workforce
+230,000

Global Footprint
45 Countries
354 Investments

Annual Sales
€26,8 billion

a member of CLEPA
European Association of Automotive Suppliers

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Did You Know?

- Globally, Türkiye ranked 4th in bus production, 9th in light commercial vehicle production, 13th in light vehicle production, and 14th in passenger car production in 2025.
- Nearly 3 out of every 4 vehicles produced by OSD members are exported.
- Türkiye ranked 1st in light commercial vehicle and bus production, 5th in light vehicle production, and 6th in passenger car production compared with EU member states in 2025.
- More than 70% of Türkiye's automotive exports are destined for European markets.
- In 2025, Türkiye ranked as the EU’s 2nd largest source of new vehicle imports and 2nd largest export destination, both by volume.
- Türkiye ranked among the EU's top five export destinations for battery-electric passenger cars by value in 2025.

Did You Know?

- Europe market leader of **shafts** for light commercial vehicles is from Manisa
- One of every 5 heavy duty vehicles have Turkish **brake diaphragms** from Çayırova
- **Hybrid engine production** facilities of global OEMs in Europe are in **Türkiye**
- 15% of **wipers are** produced in Gebze
- **The horn** of first car in space, Tesla Roadster is from Bursa
- Turkey has one of top three production capacity for **air springs** globally
- One of every 7 s**eat belt connectors** is from Gebze
- Turkish Automotive Industry does not only export vehicle and parts but also exports ***engineering services***
- One out of every 5 cars manufactured in Europe has wheels made in Türkiye

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Strengths of Turkish Automotive



Development of the Turkish Automotive Industry

Customs Union with EU



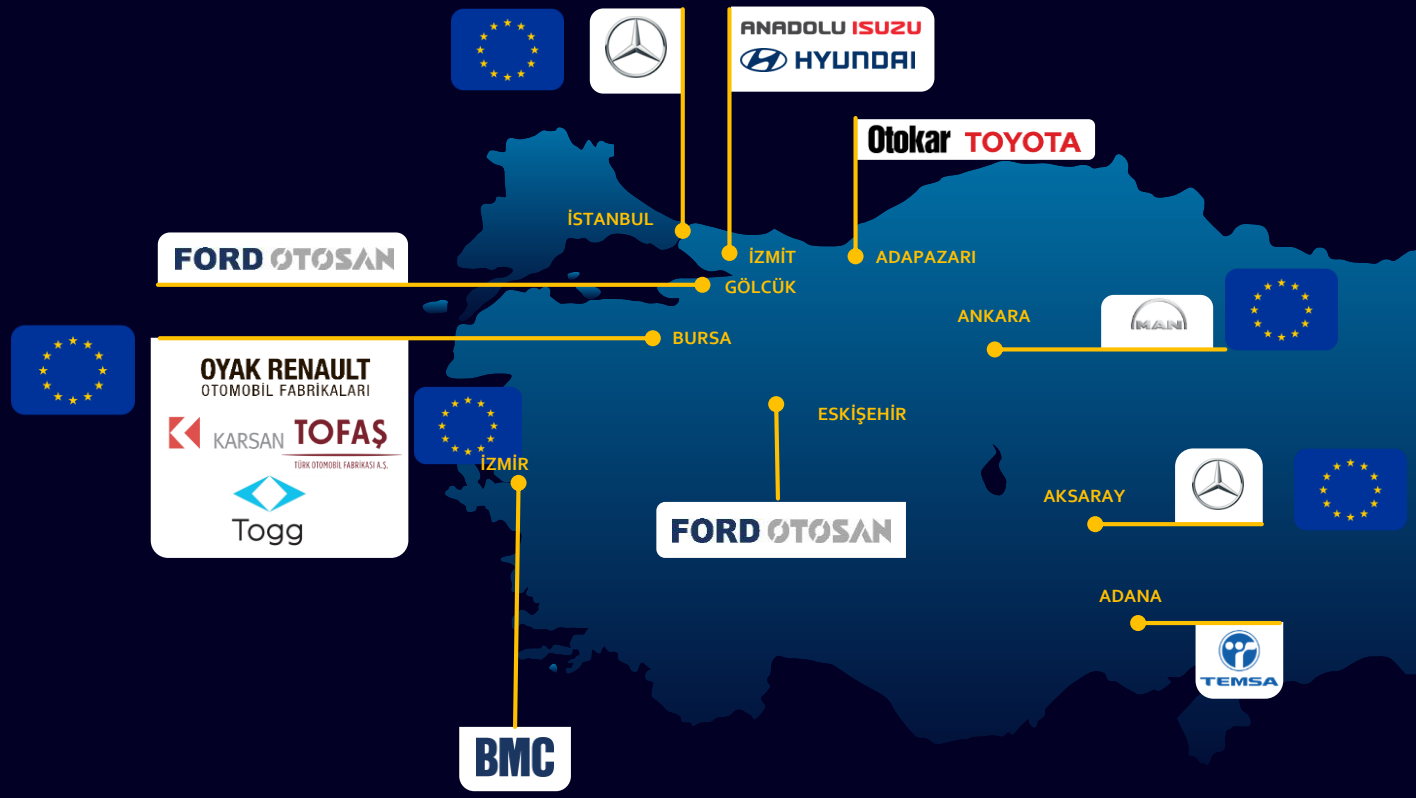
Assembly	Development of Component Industry	Increase in Capacity	Up-To Date Model Export	Full Integration Manufacturing Base	R&D, Design and Technology Management, Intellectual and Industrial Property	Redefinition of the Industry (Smart Mobility)
1960 - 1970	1970 - 1980	1980 - 1990	1990 - 1995	1995 - 2000	2000 - 2020	2020 - ...
Licence	Localization	Modernization	Up-To Date Model			

PROTECTED MARKET

OPEN MARKET

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Automotive Production in Türkiye



15* **OEM's**

Capacity (1000 units)	
Ford Otosan	635
Tofaş	500
O.Renault	390
Toyota	280
Hyundai	245
Togg	175
Mercedes Benz	26
Other Companies	275
Total	**~2.5 Million**

**Note: 13 of them are OSD Members*

Türkiye in the World Ranking *(Based on Production Units-2025)*

	Automobile	Light Commercial	Light Vehicles [1]	Bus
European Union Production	6. 2024 : 6.	1. 2024 : 2.	5. 2024 : 5.	1. 2024 : 1.
World Production	14. 2024 : 15.	9. 2024 : 10.	13. 2024 : 13.	4. 2024 : 5.

Source: OICA data

[1]: Automobile + Light Commercial

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OSD Members' Key Investments in 2024-2026



Ford Commercial Vehicles
€780 million project investment in 2024
€2,2 billion total project investment (2021–2025)



Production of Renault Duster, Yeni Renault Clio, Renault Boreal ve Dacia Striker
~ €400 Million



Production of Tofaş K0
~ €200 Million



Hyundai Motor Türkiye
IONIQ 3 production
~ €715 Million



Production of Tofaş K9
~ €256 Million



Bus Production by Otokar–Daimler Buses



Joint Development by Ford Trucks and IVECO €343 Million

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Advanced Supplier Industry

10,500 exporter SME's

200 foreign investors

230,000+ employees

€ 14 billion export

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

Top 100 Global Automotive Suppliers – Türkiye

+30 of the **top 100**

global suppliers

have production

facitilies in **Türkiye**



Main Export Markets



85 % towards
European Countries

- Germany
- France
- United Kingdom
- Spain
- Italy
- Slovenia
- Poland
- Belgium
- Romania
- USA

Automotive Trade with EU (From TR to EU)

EU new car imports, main countries of origin

Trade in volume (in units)	2023	2024	2025	% change	% share
China	745,535	769,935	1,006,188	+30.7	28.1
Türkiye	524,022	547,752	566,823	+3.5	15.8
Japan	480,481	508,163	432,144	-15.0	12.1
Morocco	389,437	447,888	377,889	-15.6	10.6
South Korea	436,882	358,235	375,643	+4.9	10.5

SOURCE: **EUROSTAT**

Vans: Türkiye was the EU's largest import source, with a 68.0% share by value (€4.2 billion)

Trucks: Türkiye ranked 1st among EU import sources, with a 59.2% share by value (€1.5 billion).

Buses: Türkiye was the EU's largest import source, accounting for 65.5% of imports by value (€2.5 billion).

Automotive Trade with EU (From EU to TR)

EU new car exports, main destination

Trade in volume (in units)	2023	2024	2025	% change	% share
United Kingdom	1,304,825	1,275,778	1,290,748	+1.2	28.8
Türkiye	617,326	598,220	717,204	+19.9	16.0
United States	823,674	771,838	667,694	-13.5	14.9
Switzerland	204,596	180,004	180,312	+0.2	4.0
Japan	194,406	144,682	163,277	+12.9	3.6

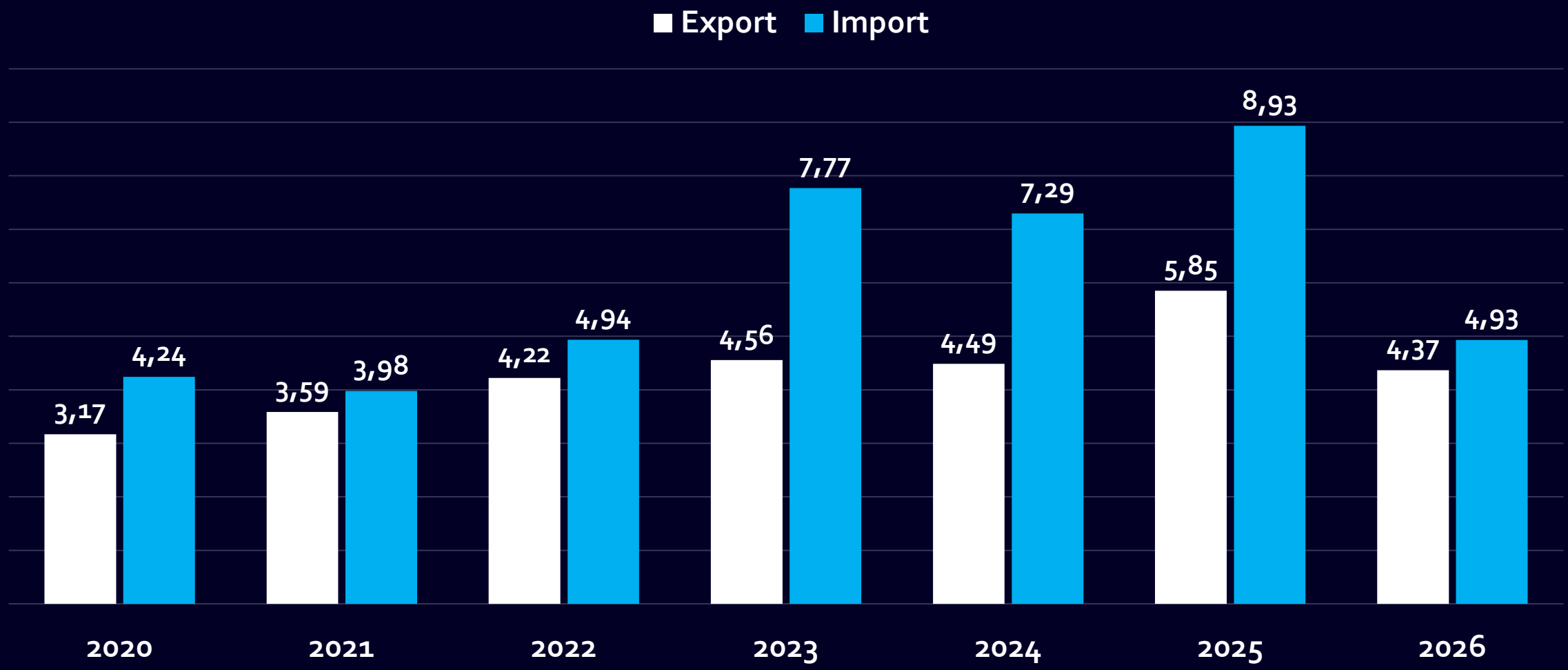
SOURCE: **EUROSTAT**

The EU exported 124,055 battery-electric new cars to Türkiye in 2025, worth €3.7 billion.

Vans: Türkiye ranked 2nd among EU export destinations, with a 21.1% share by value (€1.5 billion).

Trucks: Türkiye was the EU's 2nd largest export destination, wth a 12.8% share by value (€1.7 billion).

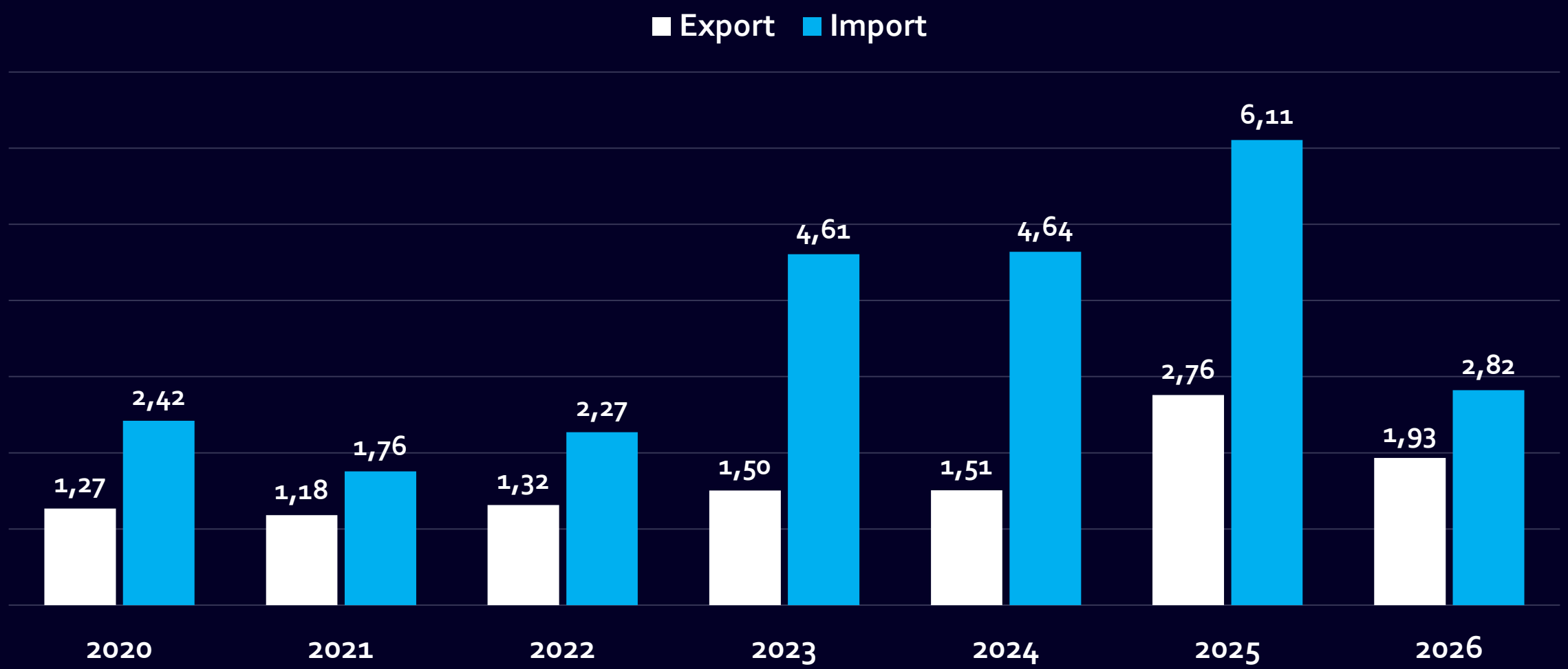
Türkiye-Germany: Foreign Trade Balance of Automotive Sector (Billion €)



* As the year 2026 has not yet been completed, the January–September period has been taken as the reference period.

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Türkiye-Germany: Foreign Trade Balance of Automotive Industry-OEMs (Billion €)

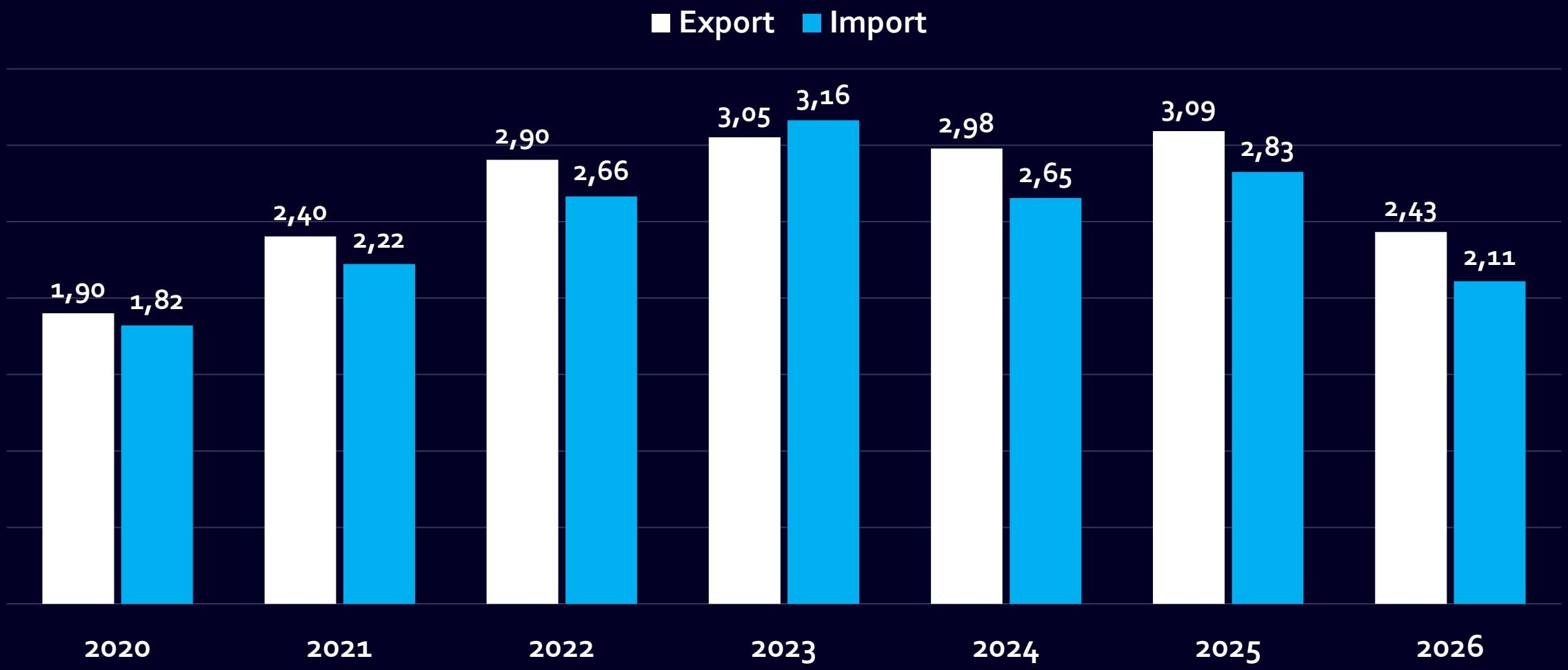


January-September

* As the year 2026 has not yet been completed, the January–September period has been taken as the reference period.

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Türkiye-Germany: Foreign Trade Balance of Automotive Supply Industry (Billion €)



*As the year 2026 has not yet been completed, the January–September period has been taken as the reference period.

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Türkiye is Fully Integrated into Europe's Manufacturing Ecosystem

30+
Years of industrial integration

BALANCED TRADE

EU → TR **28 b€**

TR → EU **26 b€**

#3
TR's rank in EU's automotive export destination

800 K+
EU's vehicles exported to Türkiye

55%
Share of EU-made parts in Türkiye's parts imports

70%+
TR's vehicle production generated by European manufacturers

60%
European-brand share in TR automotive market

85%
Share of European manufacturers in TR–EU bilateral trade

250 K+
Jobs in the EU, supported by Türkiye's automotive industry

→ **Türkiye is fully integrated into Europe's manufacturing ecosystem**

→ **European companies have profitable operations in Türkiye, supporting their main operations in EU**

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The Need for 'Industrial Accelerator Act'

Decline in the manufacturing GDP

- share of EU manufacturing GDP has declined from 17,4% to 14,3% in btw 2000 and 2024
- strategic warning signal with potentially structural impacts to the EU's prosperity and social cohesion

Challenges in the EU manufacturing sector

- high energy prices,
- global overcapacities,
- high operational costs for decarbonisation and new technology deployment,
- low investment compared to other regions,
- regulatory hurdles

Industrial Accelerator Act aims to ensure that by 2035, this trend is reversed and that manufacturing represents 20% of the EU GDP

- Prevent strategic dependencies to other countries
- Supports the creation of new manufacturing and industrial jobs in Europe
- Contributes to decarbonisation and stronger climate performance
- Protects supply security for both European citizens and companies
- Strengthens Europe's industrial competitiveness and resilience

IAA is mainly addressing economical threats from China



However, it is excluding Türkiye who is long term and trusted partner of EU

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Türkiye is Vital for a Stronger European Automotive Industry



JOINT DECLARATION BY TÜRKİYE'S MAIN AUTOMOTIVE ASSOCIATIONS

A STRONGER EUROPEAN AUTOMOTIVE INDUSTRY REQUIRES STRONGER EUROPEAN VALUE CHAINS

For more than 30 years, Türkiye and the European Union have built one of the world's most integrated automotive manufacturing ecosystems.

Under the EU-Türkiye Customs Union, vehicles, parts, technologies and investments move seamlessly across borders - powering European competitiveness, supporting considerable number of jobs and driving innovation.

This is reflected not only in industrial integration but also in balanced mutual trade, shared investments and interconnected supply chains.

The Industrial Accelerator Act presents a unique opportunity to reinforce the integrated automotive ecosystem that the EU and Türkiye have built together over more than three decades.

To preserve and further strengthen the mutual benefits of the EU-Türkiye automotive partnership, vehicles and automotive components assembled or manufactured in Türkiye should be recognized within the "Union Origin" definition and included across all relevant provisions of the proposal.

Türkiye is an integral part of Europe's automotive manufacturing ecosystem

30+	BALANCED MUTUAL TRADE	#3	800 K+	55%
Years of industrial integration	EU → TR €28 bn TR → EU €26 bn	TR's rank in EU's automotive export destination	EU's vehicles exported to Türkiye	Share of EU-made parts in Türkiye's parts imports

70%+	60%+	85%	250 K+ Employment	COMPLEMENTARY MANUFACTURING
TR's vehicle production generated by European manufacturers	European-brand share in TR automotive market	Share of European manufacturers in TR–EU bilateral trade	Jobs in the EU, supported by Türkiye's automotive industry through integrated value chains and mutual trade	Fully integrated into Europe's manufacturing ecosystem

Stand Together in Global Competition

RECOGNISE TÜRKİYE WITHIN THE "UNION ORIGIN" FRAMEWORK	STRENGTHEN EUROPE'S COMPETITIVENESS TOGETHER	ENSURE CONSISTENCY WITH THE CUSTOMS UNION	AVOID UNINTENDED FRAGMENTATION OF VALUE CHAINS
Recognise vehicles and parts manufactured and assembled in Türkiye within the "Union Origin" framework, reflecting the deeply integrated European automotive value chain.	Strengthen Europe's global competitiveness through trusted industrial partnership, open market, same rules on new investments, innovation and sustainable transformation.	Ensure full legal consistency with the EU-Türkiye Customs Union and uphold existing obligations and the spirit of the partnership since 1995.	Avoid disrupting the seamless flow of vehicles, components and technologies across borders and undermining Europe's industrial strength and resilience.

Joint Declaration of Turkish Automotive Industry

A Stronger European Automotive Industry is Possible Through a Value Chain Adopted Similar Policies

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If Türkiye is Excluded!

The Cost of Exclusion

250K+ **Unemployment will increase in EU**
(250k+ job will be under risk)

4–9% **European consumers will pay more for the same vehicle**
(4-9%)

! **Existing supply chains will be disrupted, costs will increase, and product quality and supply resilience will be negatively affected**



→ *As fully integrated Automotive Industry and custom union country, Türkiye should be recognised in the "Union origin" definition in the IAA as EU27 countries*

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Türkiye is not a Chinese Backdoor!

Third-country automotive investment in Türkiye remains very limited. New Chinese automotive investments in EU rather than in Türkiye!

0
Active Chinese OEM production in Türkiye

0.02%
Share in total automotive manufacturing turnover

0.02%
Share in Türkiye's total exports

< 0.1%
Share in employment, foreign trade and fixed assets

Türkiye manages third-country risks:

A TÜRKİYE HAS TAKEN MEASURES TO LIMIT DIRECT THIRD-COUNTRY VEHICLE PENETRATION

MAR 2023
Additional Customs Tax
(10% + 50%)

→

DEC 2023
Export Restriction
(Except EU-27 & FTA, all BEV exports stopped)

→

SEP 2024
Restrictions extended
to PHEV

Türkiye actively manages third-country penetration and protects its domestic market.

As a result, Chinese brands' market share in Türkiye remains below 5%.



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