



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE

**INVESTMENT &
FINANCE OFFICE**

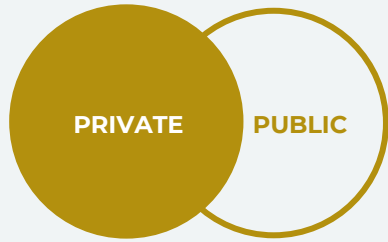
MOBILITY INDUSTRY TÜRKİYE 2026





Invest in Türkiye

Assist You Before, During and After Your Entry Into Türkiye



**PRIVATE SECTOR APPROACH
WITH PUBLIC SECTOR CAPABILITIES**



**A GOVERNMENTAL AGENCY
REPORTING TO THE PRESIDENT**



**CUSTOMIZED
CONSULTING**



**BUSINESS
FACILITATION**



**TAILOR-MADE
DELEGATION VISITS**



**PARTNERSHIP
DEVELOPMENT
ASSISTANCE**



**COORDINATION WITH
STAKEHOLDERS**



**SITE SELECTION
SUPPORT**



PROJECT LAUNCH



ONGOING SUPPORT



AGENDA

01

Global to Regional: Türkiye's Edge

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Automotive Industry in Türkiye

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Strategic Location & Market Access

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Qualified Workforce

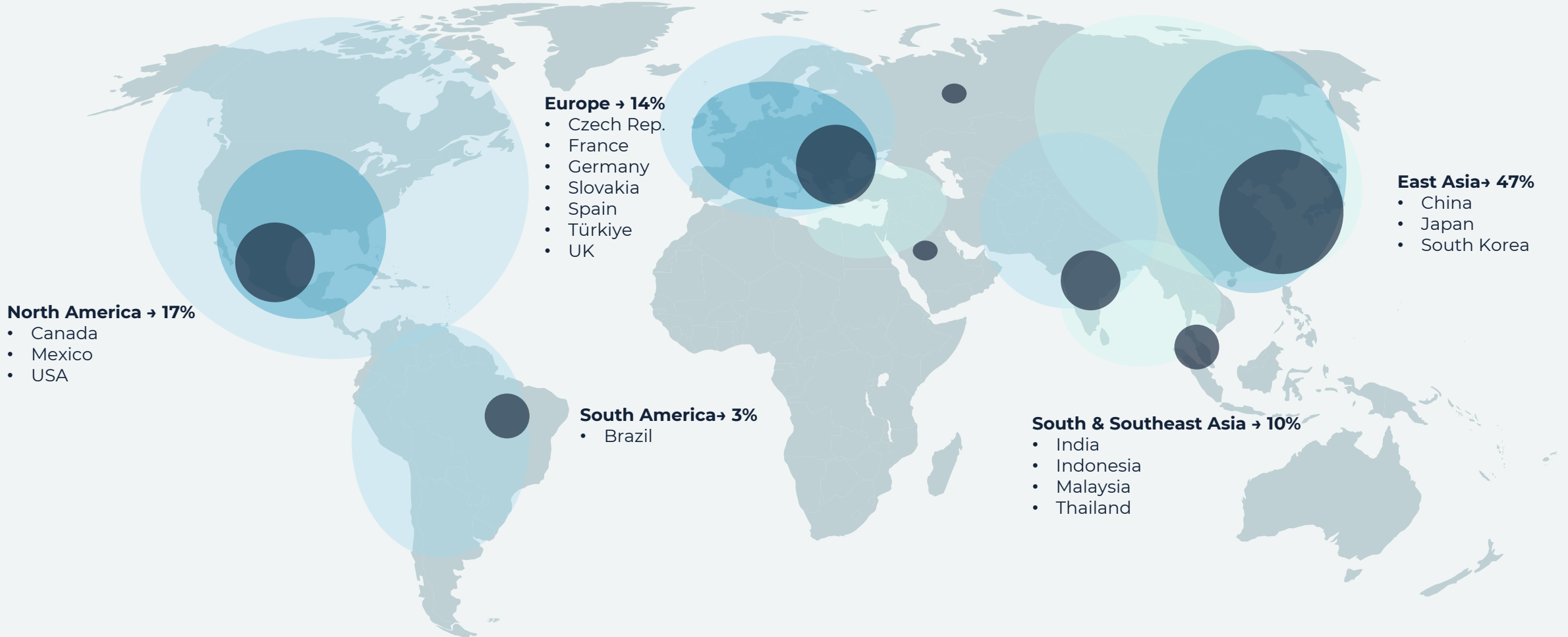
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Electric Vehicles & Future Mobility



Global Automobile Production Hubs

The top 20 producing countries account for 93% of global output, forming five distinct regional clusters.

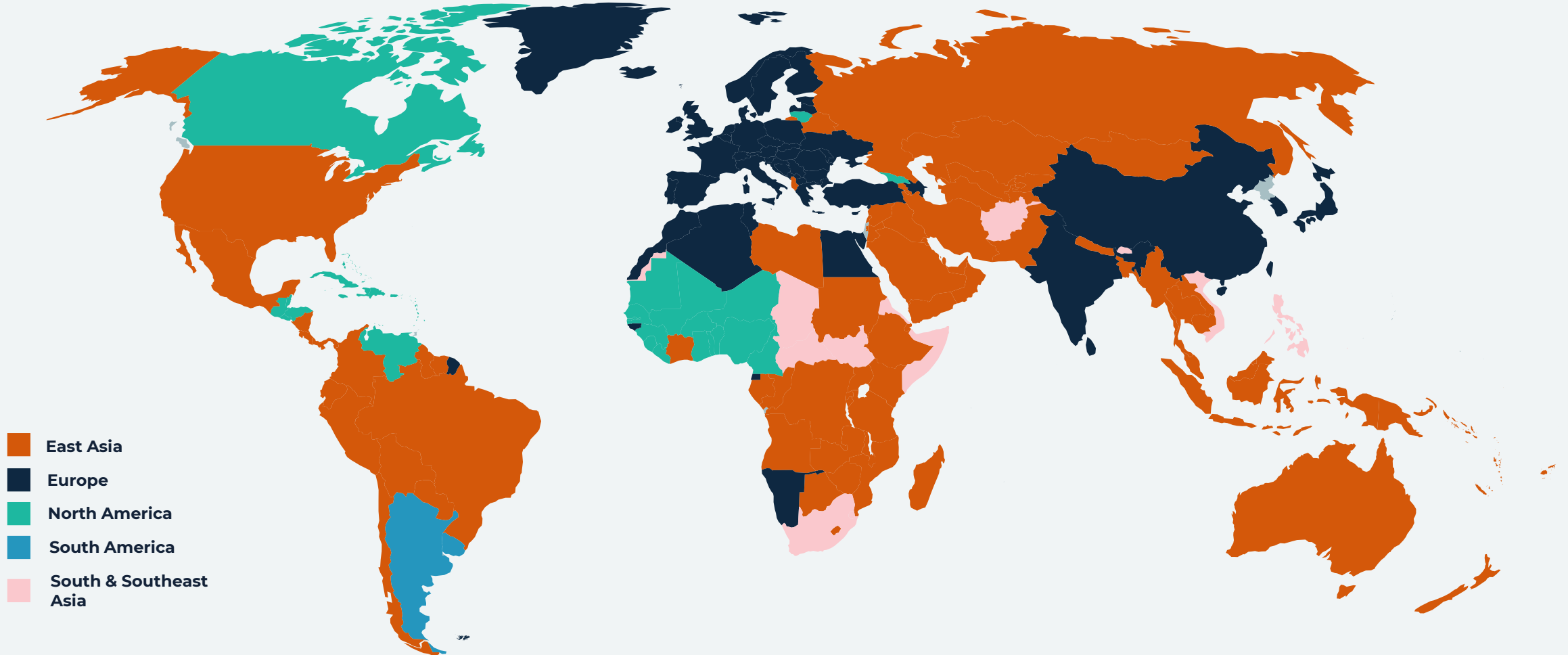


* Russia and Iran are among the top 20 producers by volume, yet they mainly produce for the domestic market.
Source: OICA, Production Statistics (2024)



Automotive Exports vs. Regional Proximity

the European hub is the most regionally concentrated of all



Source: ITC Trade Map (HS8703 – Passenger Vehicles), 2024 export data reported by 18 major producing countries — covering the supply side of global automotive trade flows."
Methodology: For each importing country, the dominant supplying hub (East Asia, Europe, North America, South & Southeast Asia, South America) was identified based on aggregate export value.

European Hub: Production

14 countries produce at least 100k vehicles annually

Total Production (Unit)

EU27

13.4M

Other Europe
(UK, Türkiye, Serbia)

2.3M

Group Brands



STELLANTIS



Volkswagen



IVECO



TOYOTA



RENAULT



ASTON MARTIN



HYUNDAI



KIA



NISSAN



TESLA



XPENG



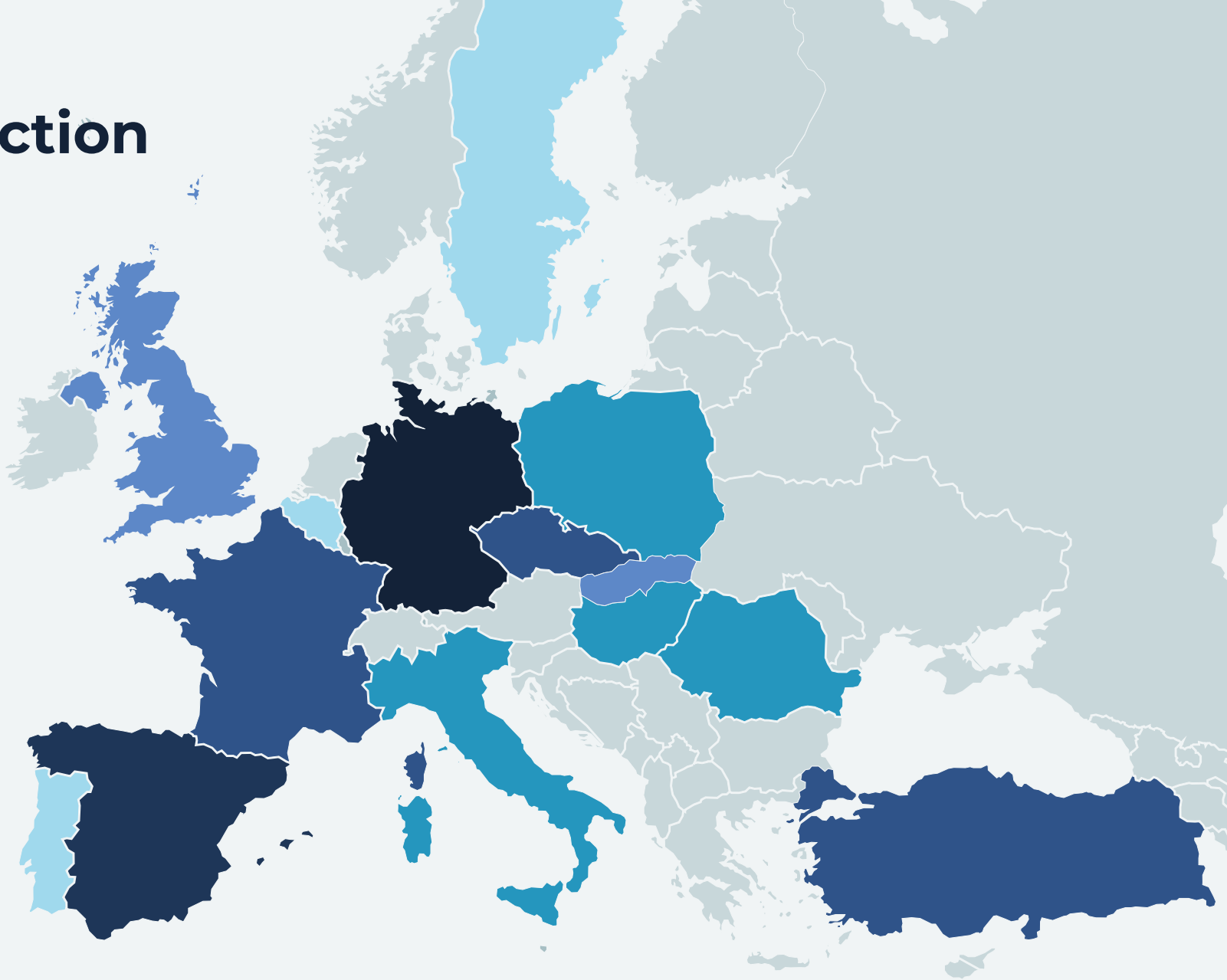
GEELY



SUZUKI



TATA



Higher Production

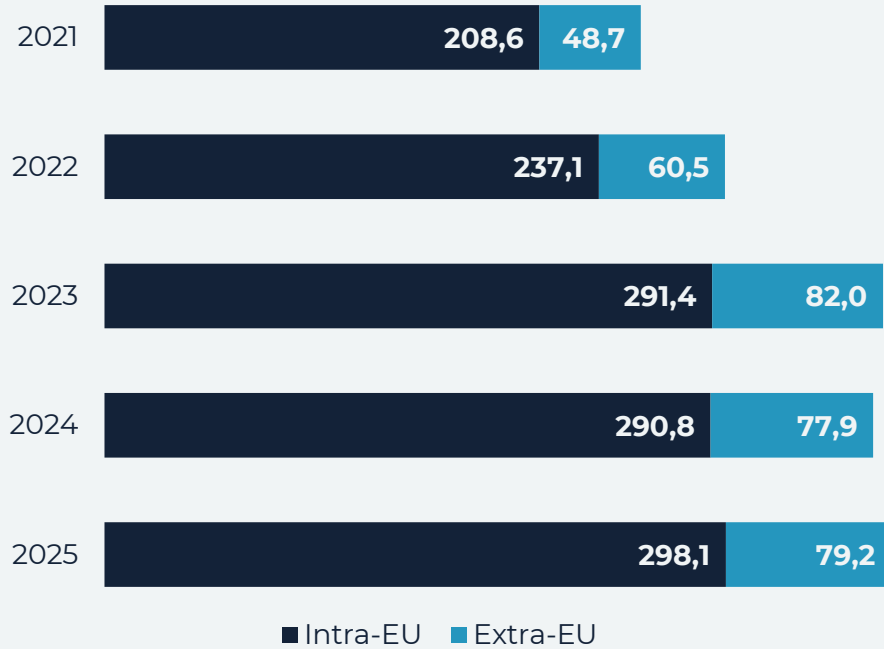
* European Countries produced at least 100k motor vehicles. Colored based on the production volume
Source: OICA, Production Statistics (2024)



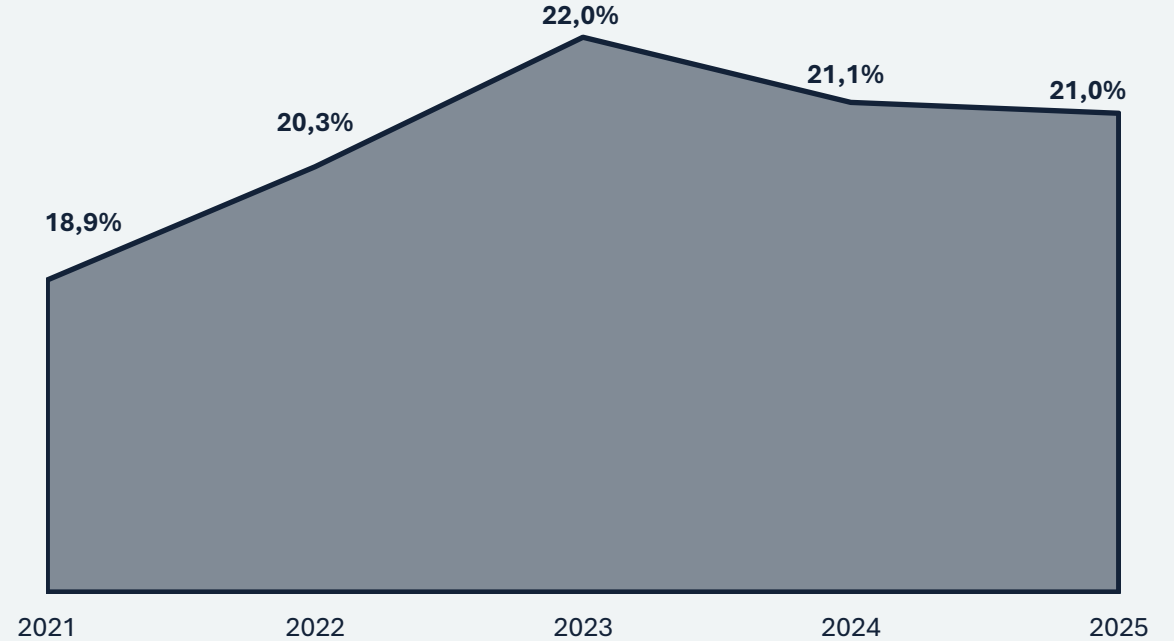
European Hub: The Import Market

Both Intra- and Extra-EU vehicle imports have grown since 2021, with the Extra-EU segment expanding faster

EU27 New Vehicle Imports by Origin (Value - €B)



Extra-EU Share of Total EU27 Vehicle Imports (%)

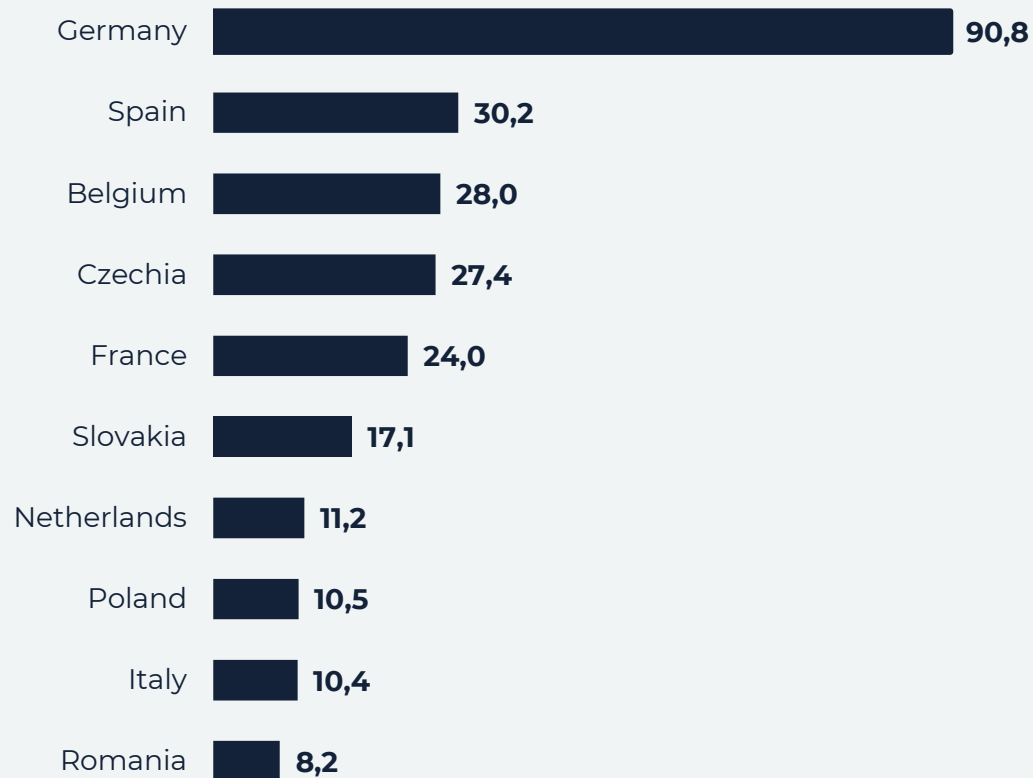




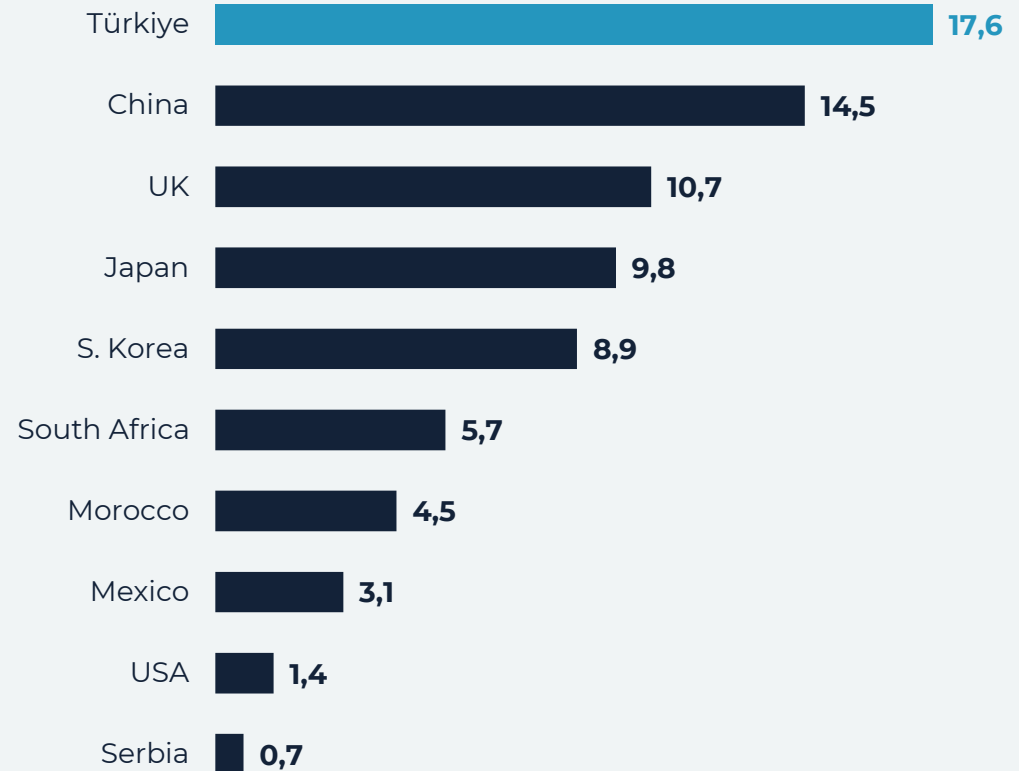
European Hub: Who Supplies the Market?

Germany dominates intra-EU supply while Türkiye leads all extra-EU suppliers as the EU's closest external automotive partner

Top 10 Intra-EU Vehicle Suppliers to EU27 (2025, €B)



Top 10 Extra-EU Vehicle Suppliers to EU27 (2025, €B)

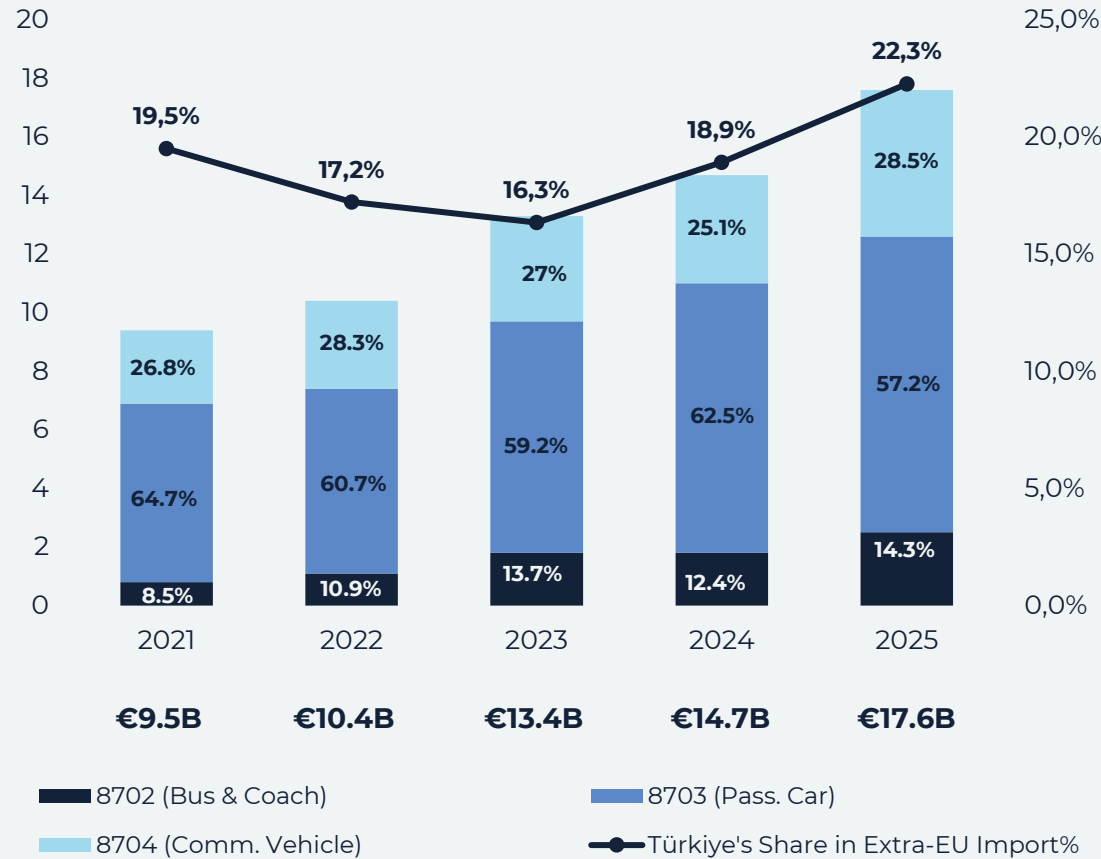




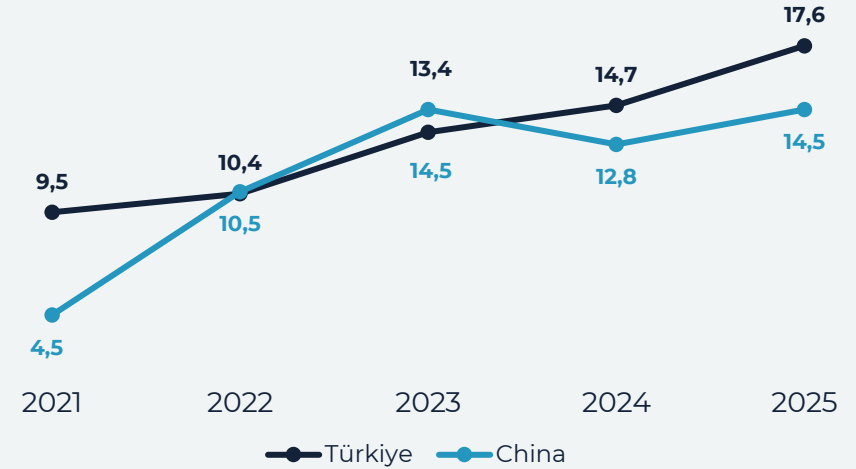
Türkiye: The EU27's Top External Vehicle Supplier

The leading extra-EU supplier by value, share, and growth momentum.

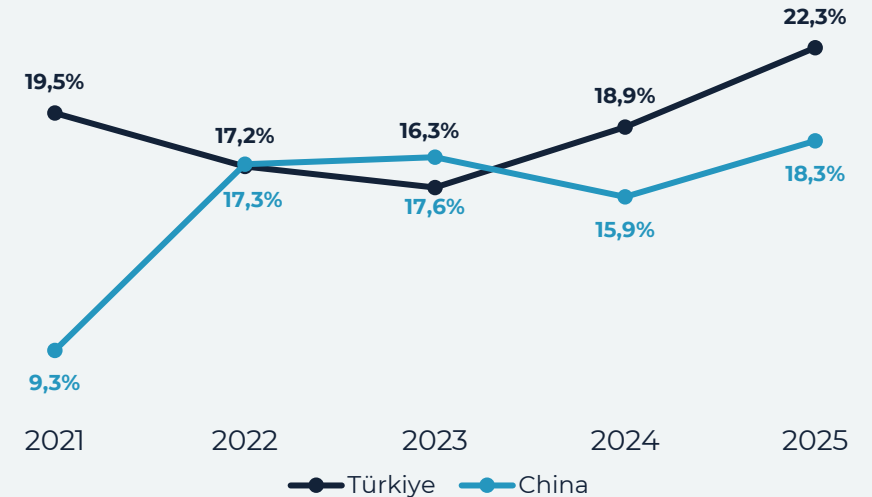
Türkiye's EU27 Vehicle Exports by Segment



Türkiye vs China: Total Vehicle Exports to EU27 (€B)



Türkiye vs China: Share of EU27 Extra-EU Vehicle Imports





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Qualified Workforce

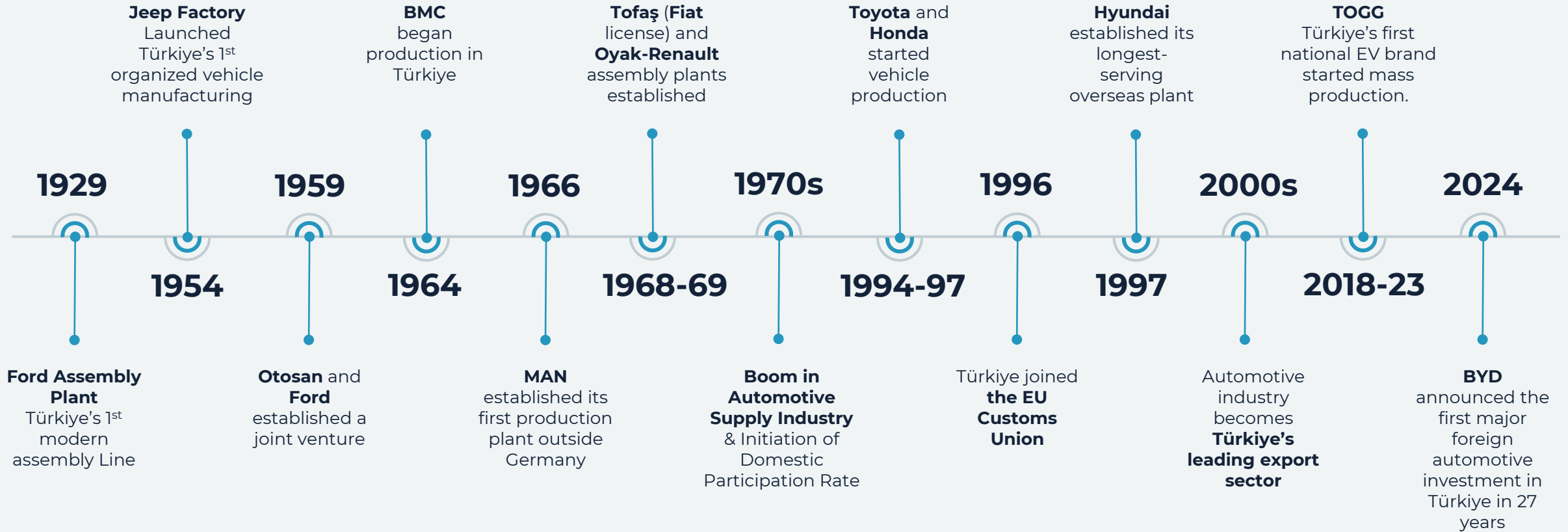
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Electric Vehicles & Future Mobility



Historical Milestones

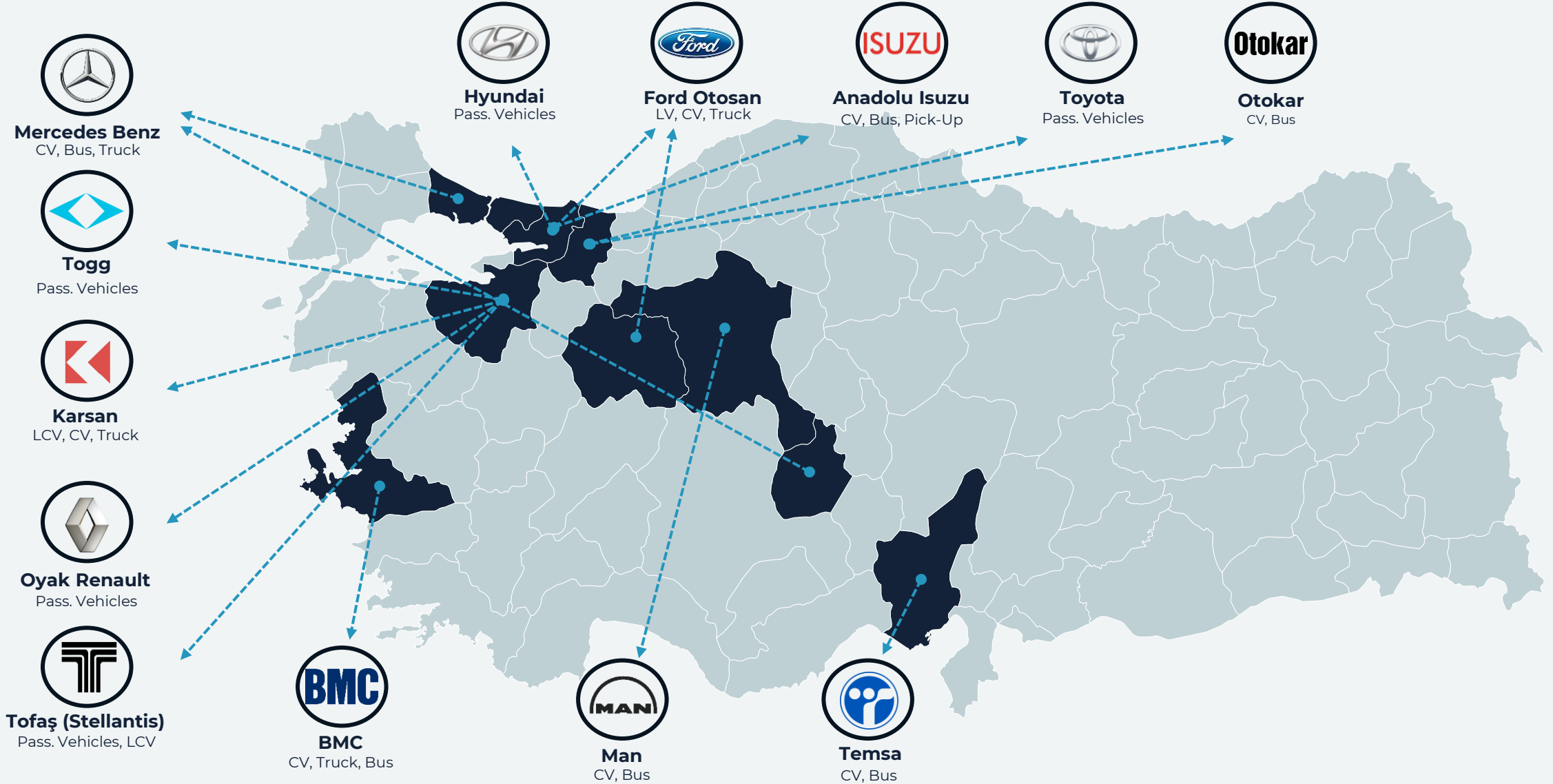
Türkiye's automotive industry has been built on nearly a century of continuous manufacturing experience





OEMs in Türkiye

From passenger cars to EVs, Türkiye hosts 13 OEMs and 15 production facilities across every major vehicle category





Leader of the Region in Automotive

Ranked #12 globally in total production, Türkiye leads Europe in bus and light commercial vehicle manufacturing

of Global OEMs



Poland 5 OEMs

Czechia 4 OEMs

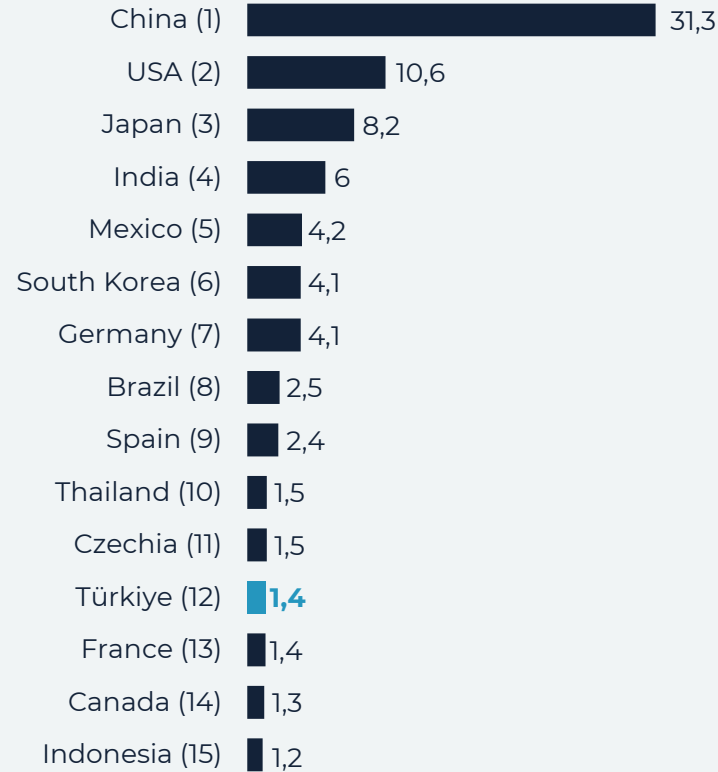
Hungary 4 OEMs

Slovakia 4 OEMs

Romania 2 OEMs

Serbia 1 OEMs

World Automotive Production in 2024 (M, Units)



Türkiye's Ranking in production

#12 in the World in total production

#4 in Europe in total production

#2 in Europe in CV production

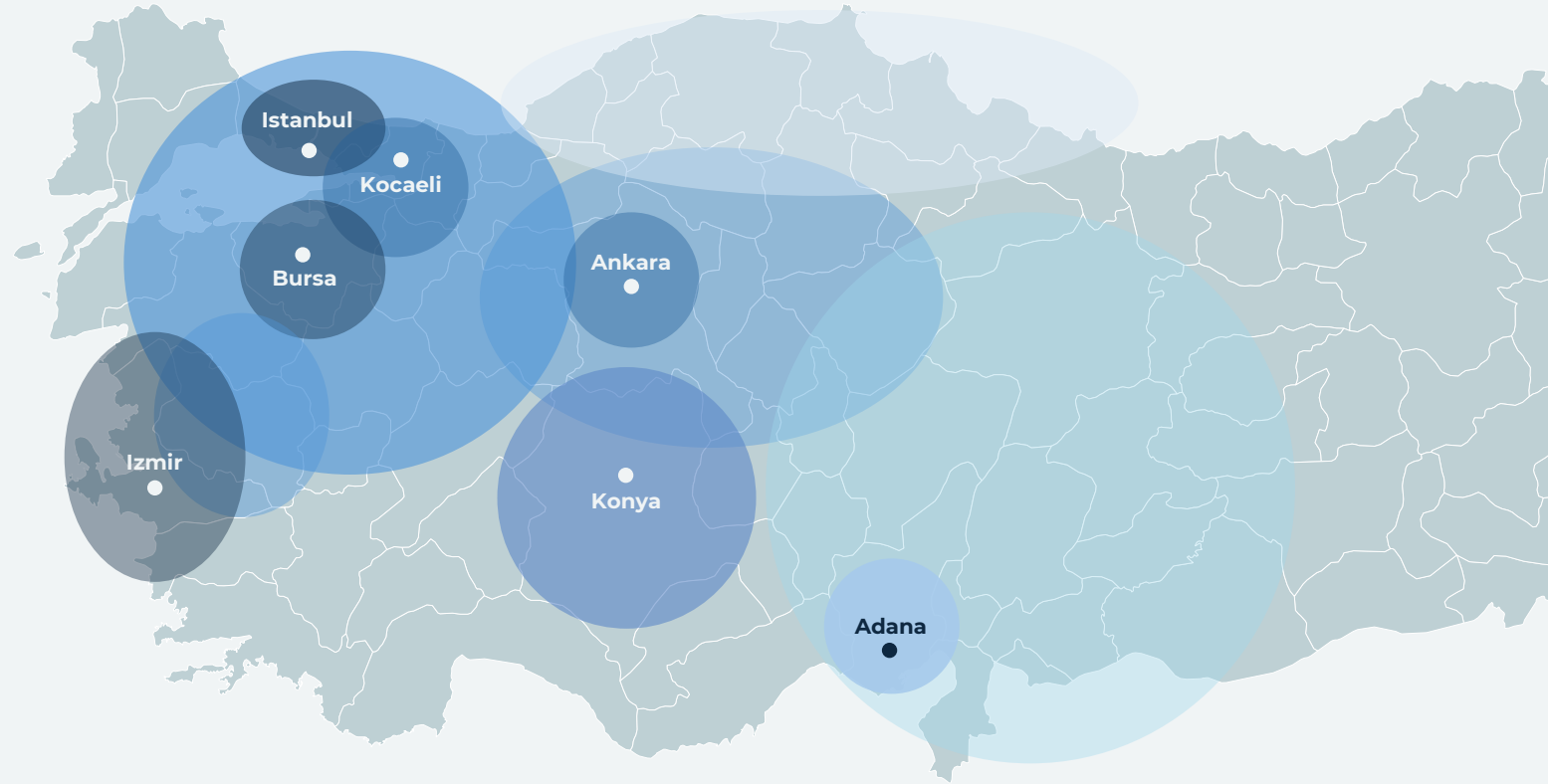
#1 in Europe in bus production

#1 in Europe in LCV production



Strong Presence of Global Tier-1 Suppliers

30+ out of 100 biggest global suppliers are in Türkiye

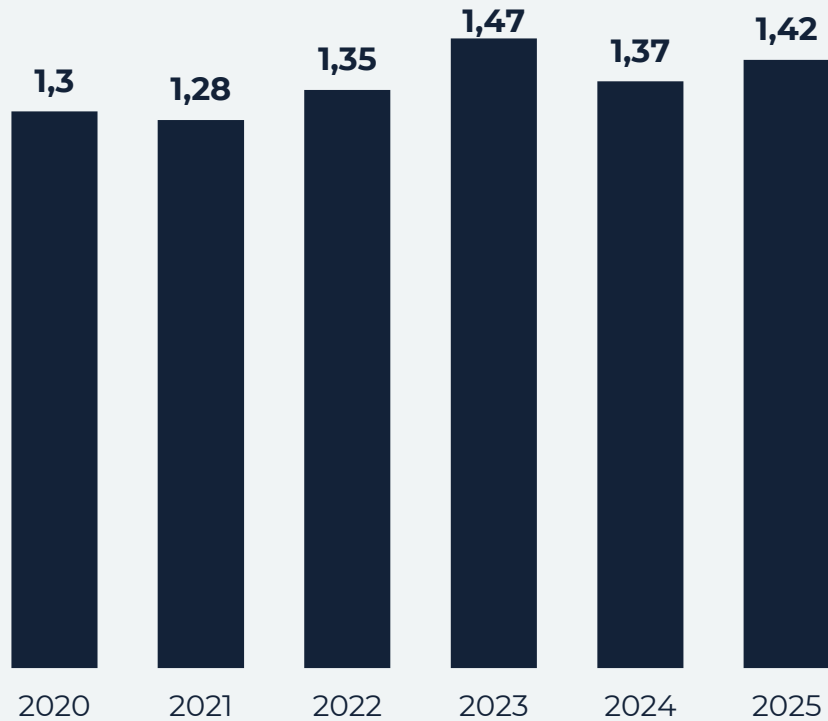




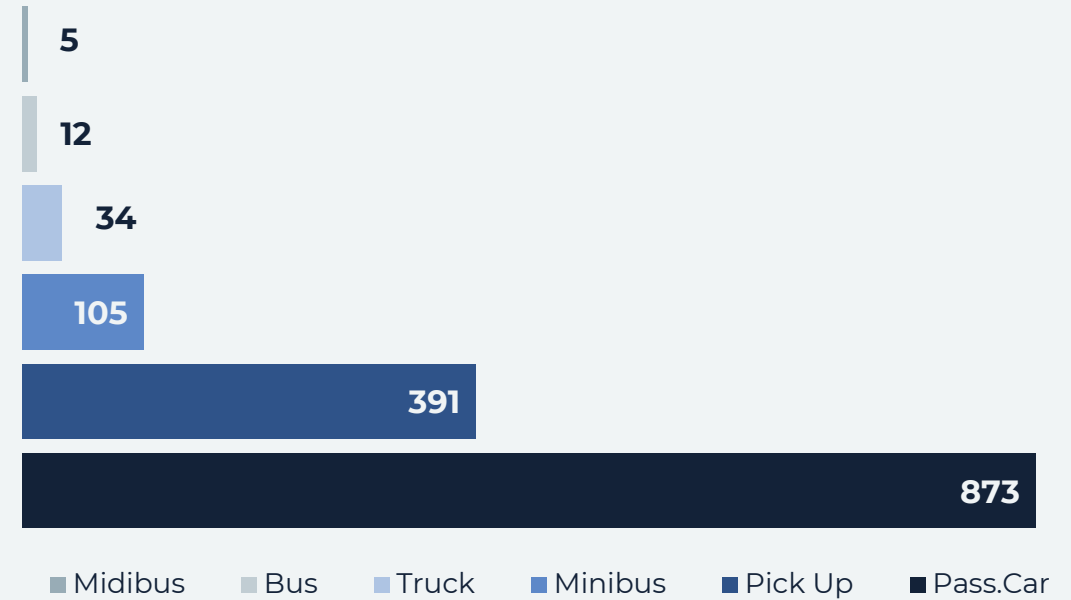
Vehicle Production Output on the Rise

1,42M units produced in 2025 — passenger cars account for over 60% of total output

Total Production (million unit)



Production Volume by Vehicle Category (thousand unit, 2025)

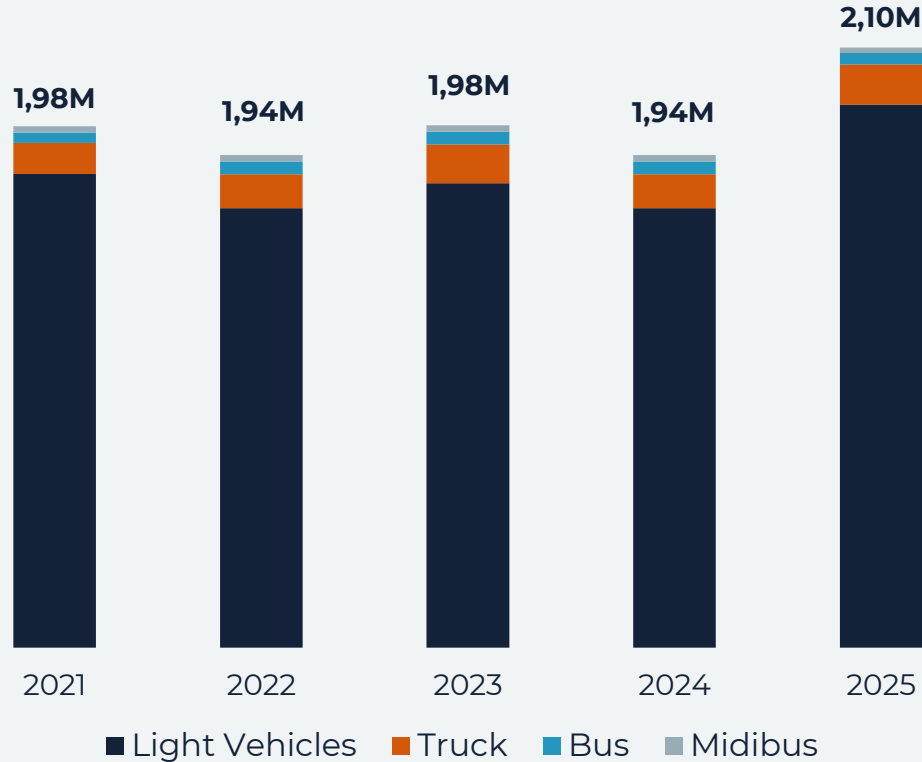




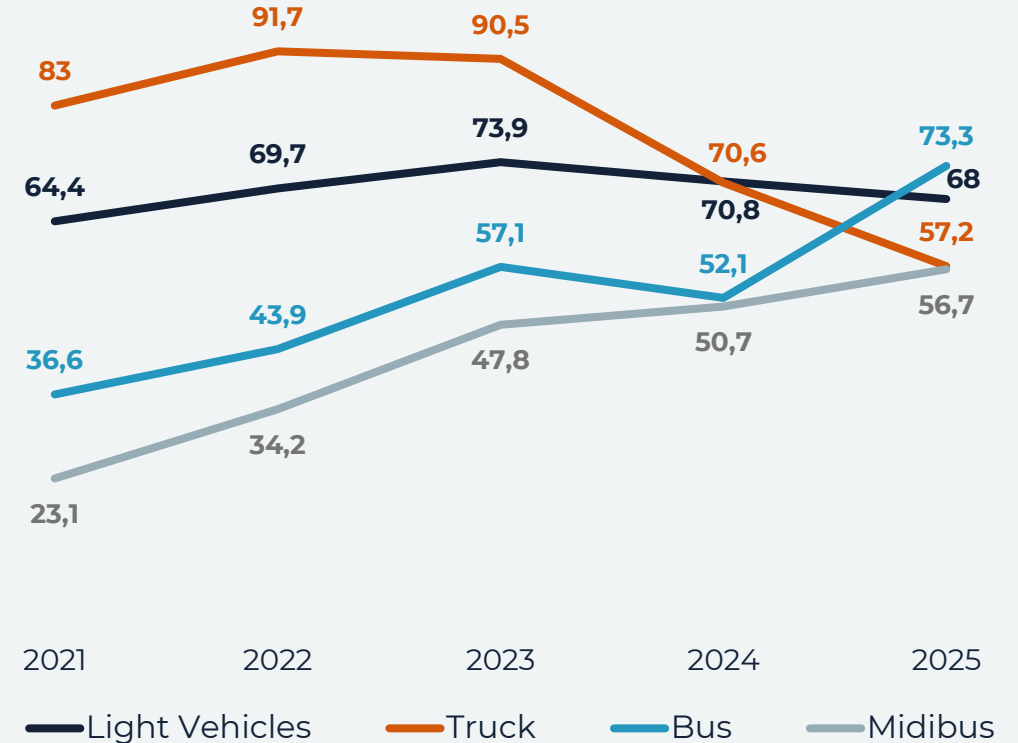
Rising Production Capacity

Total capacity expanded to 2.1M units in 2025, while bus and midibus utilization rates more than doubled since 2021

Total Capacity (unit)



Capacity Usage (%)

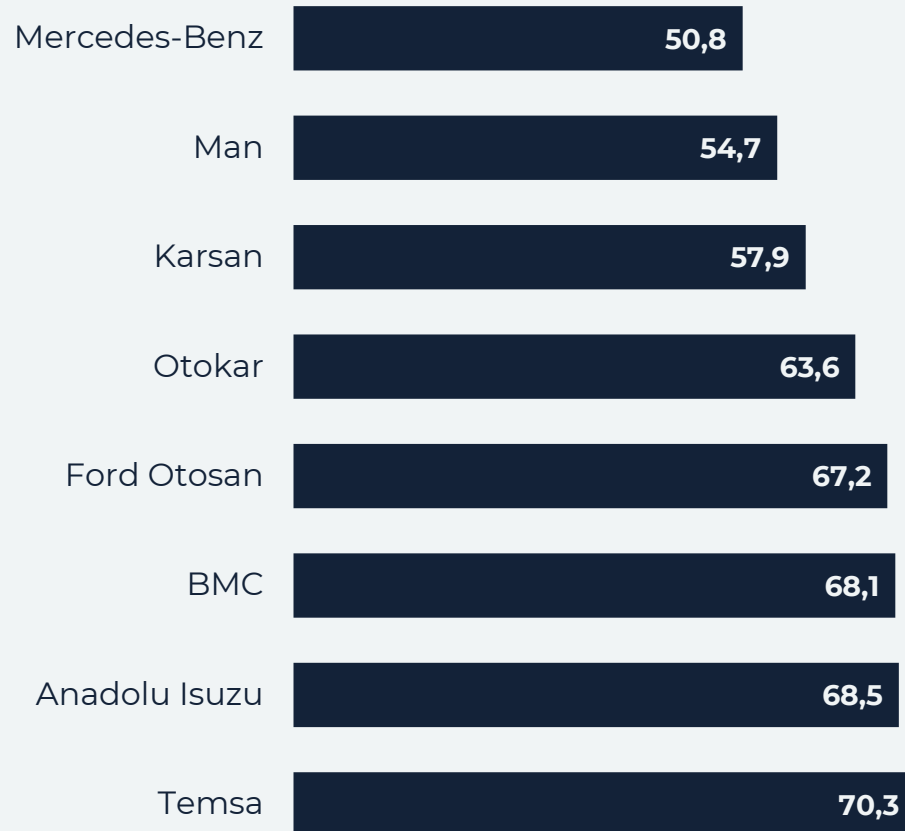




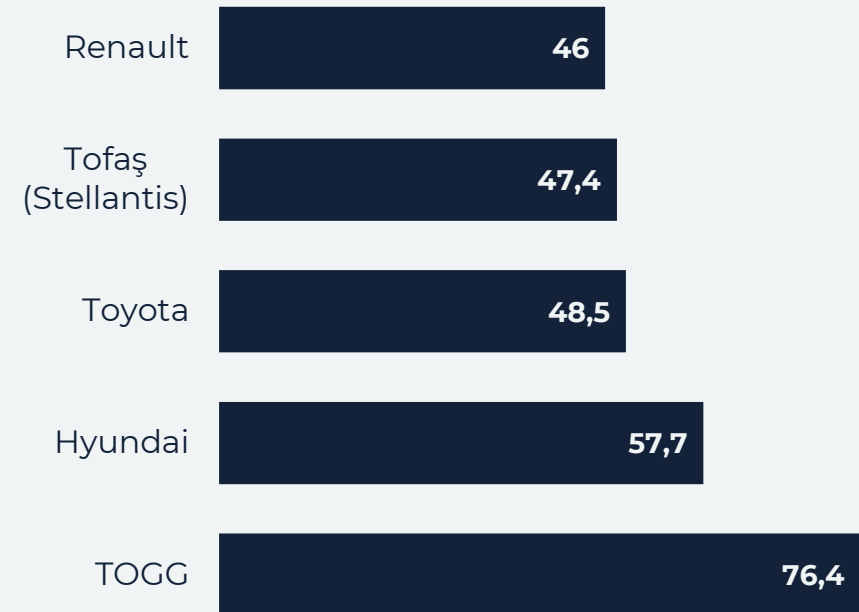
High Local Contribution Rates

Most manufacturers exceed 50% — commercial vehicles lead with rates up to 70%

Commercial Vehicles' Localization Rates 2025 (%)



Passenger Vehicles' Localization Rate 2025 (%)

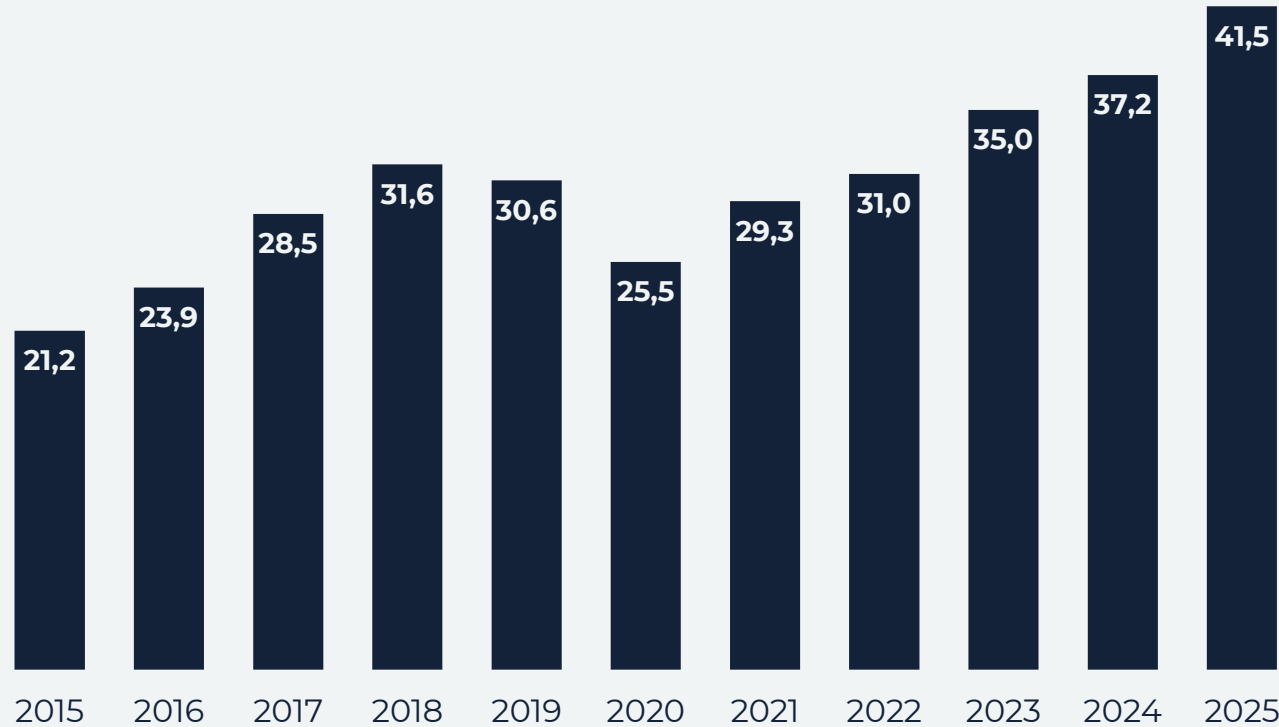




Automotive: the Flagship Sector for Exports

Türkiye's largest export category for years, automotive exports reached a record \$41.5B in 2025 — representing 28% of manufacturing and 17.5% of total exports

Automotive Industry Export (Billion \$)



Automotive Export Share (2025)

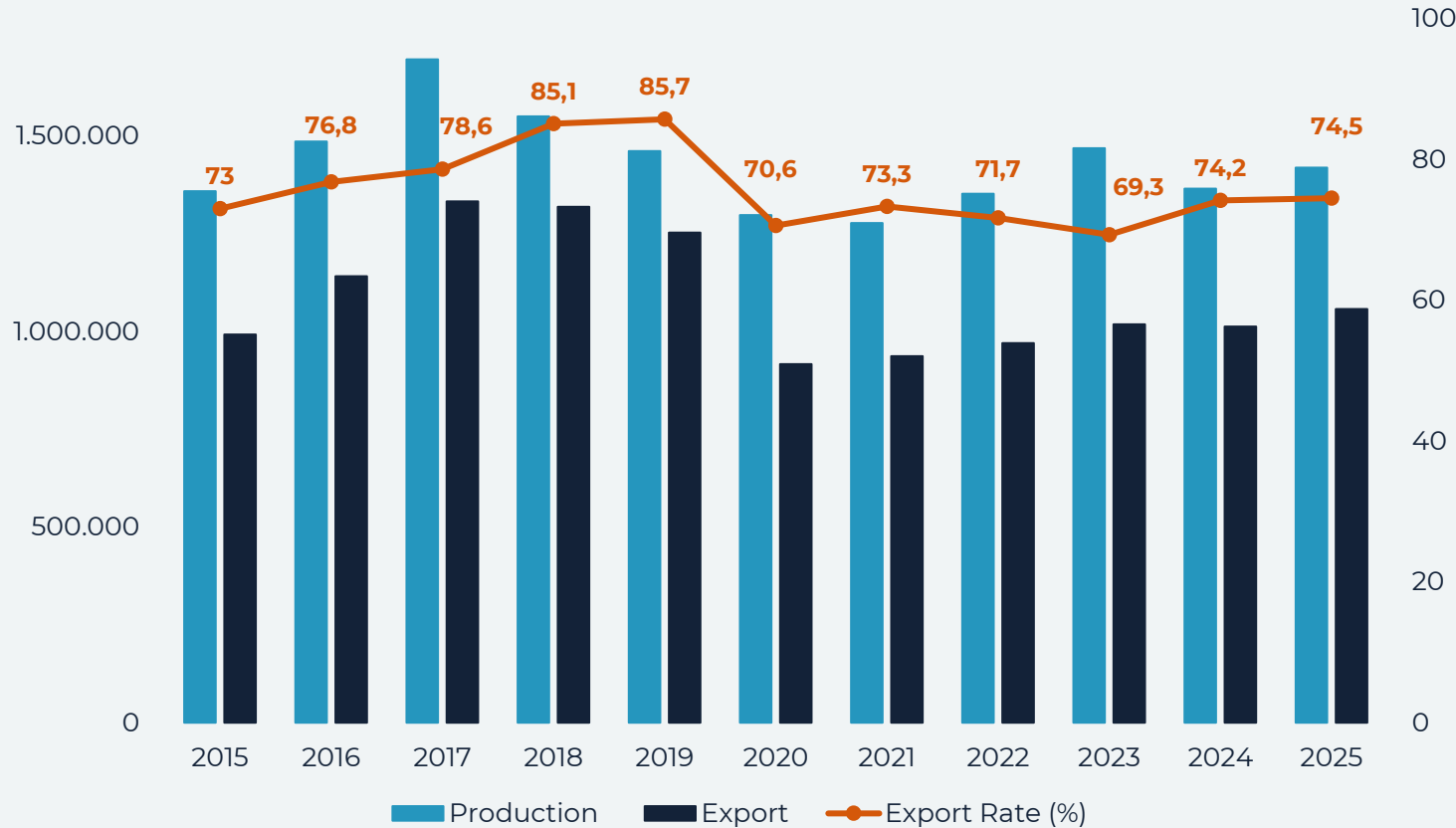




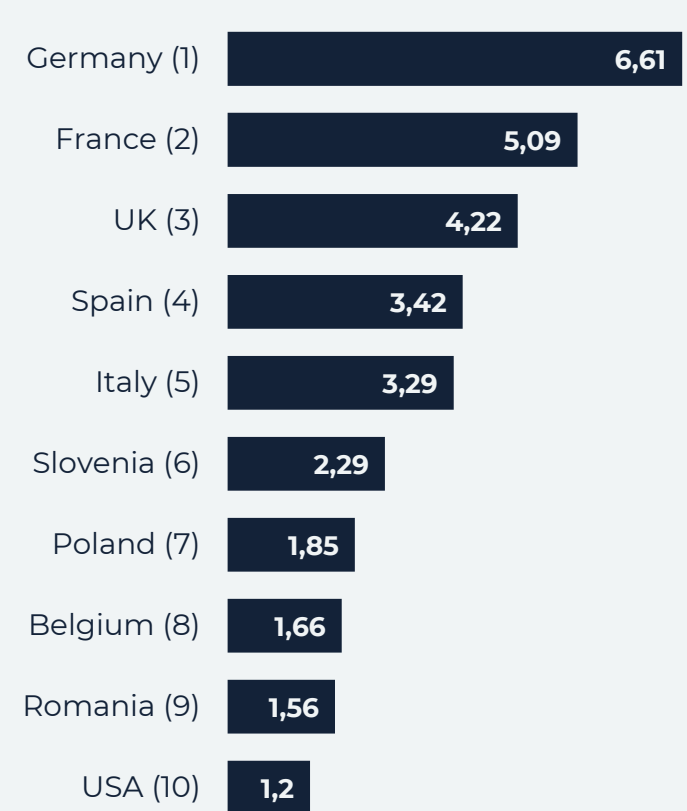
Europe's Manufacturing Partner

With export rates consistently above 70%, Türkiye's top 10 destinations representing 75% of total automotive exports are exclusively European markets.

Vehicle Production-Export Analysis (exc. Tractor) (Unit Basis, 2015-2025)



Top Auto Export Markets (2025, Billion \$)





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Domestic Market + EU Market + Free Trade Area

A young population, sustained annual growth, and deep trade integration across Europe, the Middle East and Central Asia



85.9 Million
in Türkiye



449 Million
in EU

488 Million
in FTA Area

Free Access to
1 Billion
Consumers



Domestic Market: A Fast-Growing Economy

A young population, sustained annual growth, and deep trade integration across Europe, the Middle East and Central Asia



Population
86,1 M



Median age
34,9



12th
largest economy
by PPP adjusted GDP



+5,3%
Average Annual Growth
Rate (2002-2025)



FTA with
30
countries



\$288B
FDI Inflows to Türkiye
(2003-2025)



Major Automotive Destination: Europe

Türkiye offers direct road and sea access to major European markets within few days

By Road



By Sea





Major Automotive Destination: Europe

Türkiye's multimodal connectivity — rail freight and RO-RO shipping — offers fast, flexible and cost-efficient delivery across Europe

By Train



By RO-RO + Road





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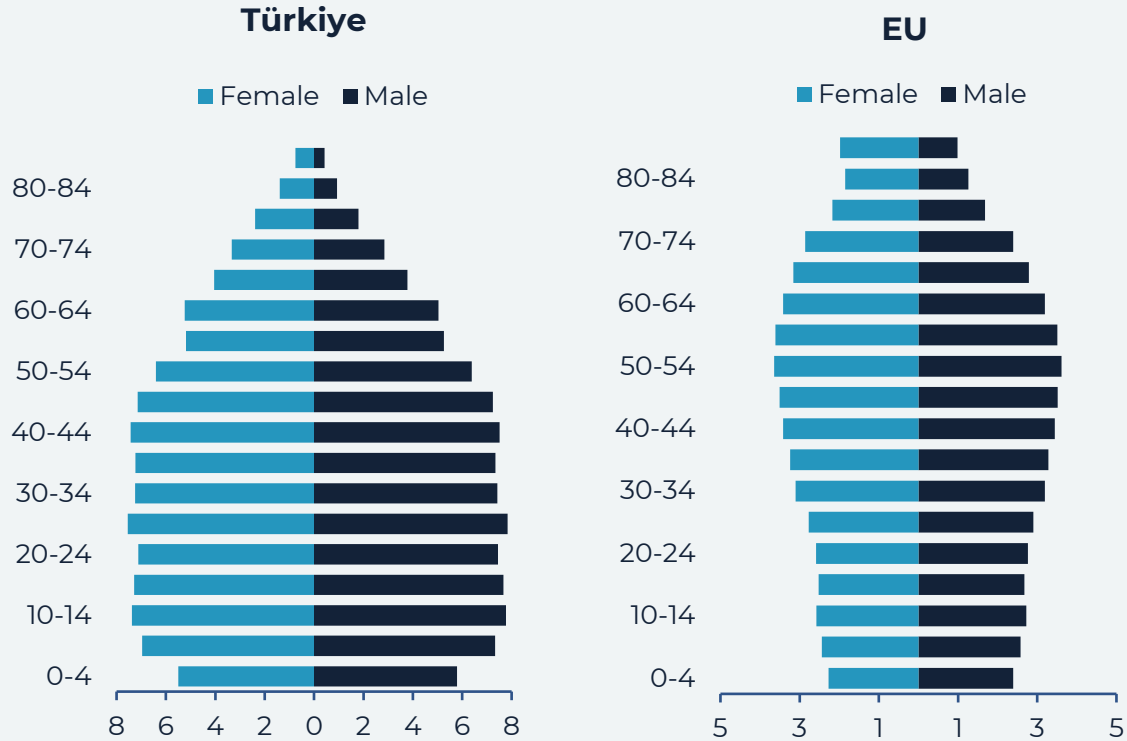
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Electric Vehicles & Future Mobility

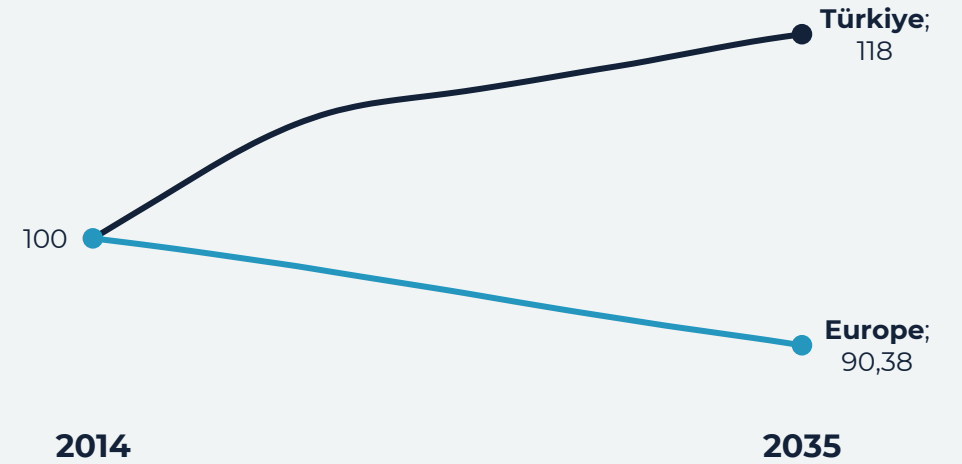


Favorable Demographics

Half of population under the age of 34.9 creates a dynamic labor force



Working Age Population
((15-64+, index: 2014=100))

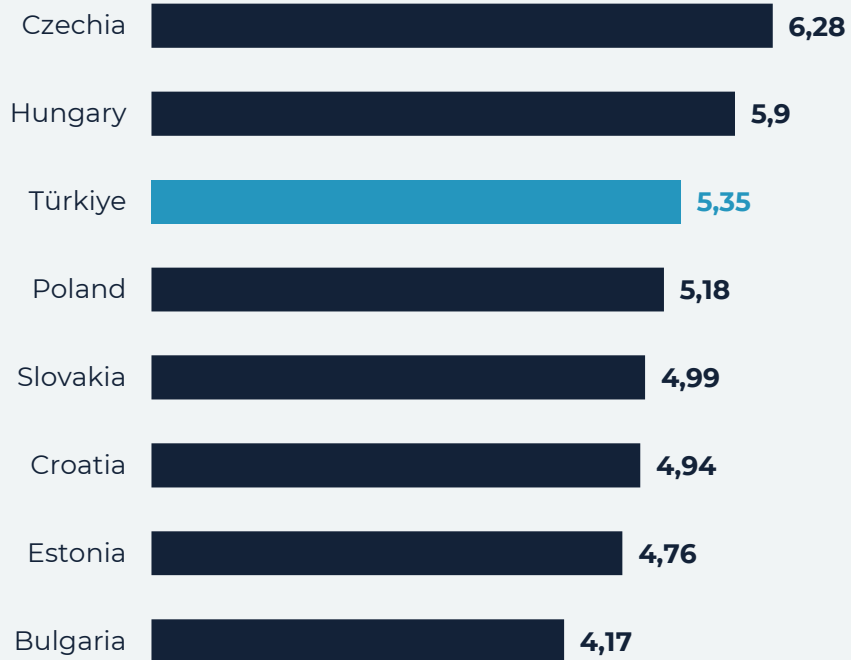




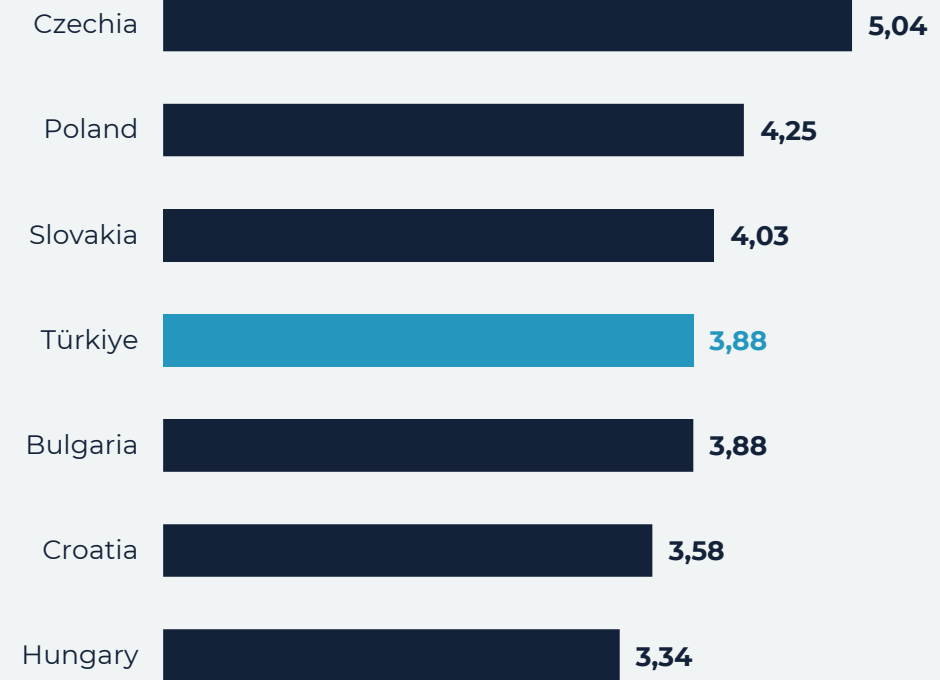
Skilled and Competitive Labor Force

Türkiye ranks among the top three in engineer availability and remains competitive in senior management talent

Availability of Qualified Engineers
(Higher is better (10=Available 0=Unavailable) 2025)



Availability of Competent Senior Managers
(Higher is better (10=Available 0=Unavailable) 2025)

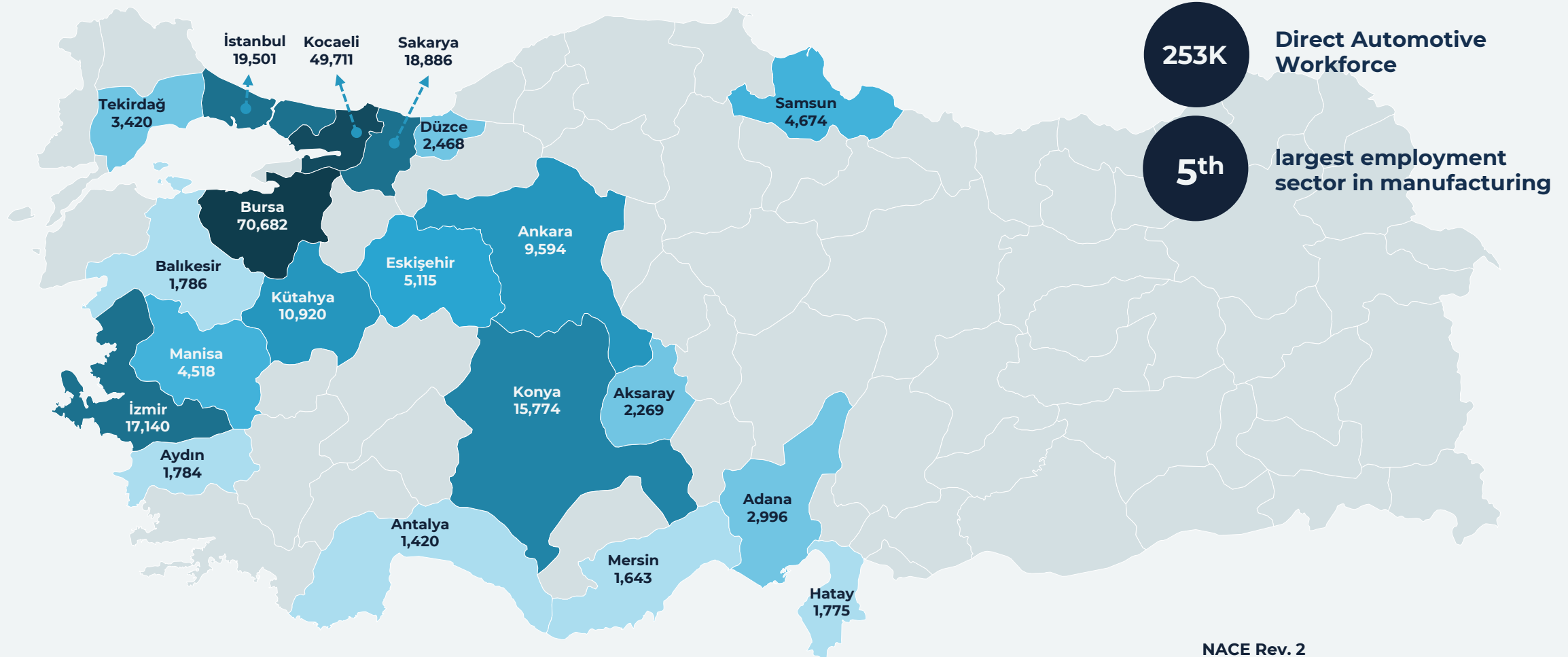




Availability Of Skilled Workforce

A qualified workforce built around OEM production hubs, with Bursa, Kocaeli and İstanbul accounting for the majority

Top 20 Provinces by Registered Automotive Workers (2024)



253K

Direct Automotive Workforce

5th

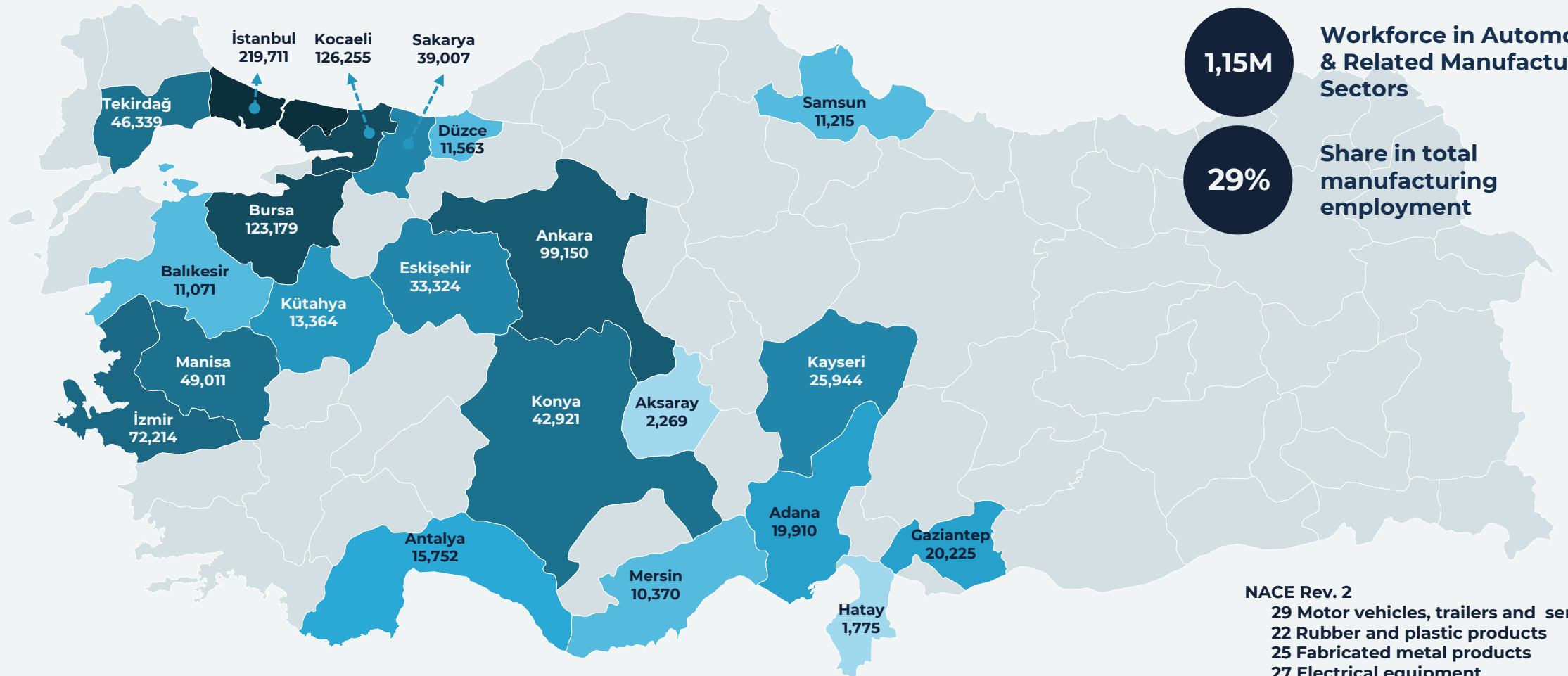
largest employment sector in manufacturing



Availability Of Skilled Workforce

Türkiye's automotive talent pool runs deep and wide across the entire value chain

Top 20 Provinces by Workforce in Automotive & Related Manufacturing Sectors (2024)



1,15M

Workforce in Automotive & Related Manufacturing Sectors

29%

Share in total manufacturing employment

- NACE Rev. 2
- 29 Motor vehicles, trailers and semi-trailers
 - 22 Rubber and plastic products
 - 25 Fabricated metal products
 - 27 Electrical equipment
 - 30 Other transport equipment



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EV Production: Passenger Cars

Türkiye's electrified vehicle production capacity is on the rise

Fully Electric



Full electric vehicle production at its Bursa plant with a **production capacity 175k / year**

Produces **Türkiye's 1st all-electric SUV model T10X**, **1st all-electric Sedan model T10F**

Total investment amount: **\$2 billion**



Already producing in Türkiye since 1997 with a **production capacity 245k / year**

Full electric vehicle production at its İzmit plant **in 2026**

Türkiye's **2nd EV manufacturer**, and the **1st among global brands**

Model will be produced: **IONIQ 3**



Plug-in Hybrid & Hybrid



Toyota's **1st European plant** to **produce PHEV and batteries**

Corolla Sedan (Incl. HEV), C-HR (Incl. HEV, PHEV), Plug-in-hybrid batteries

Battery assembly line capacity: **75k/year**

Sales started in **2023**



RENAULT

Renault will **globally** launch **8 new models** with an investment of over **€3 billion**.by **2027**

4 of them will be **produced in Türkiye**

Apart from **Renault Duster** and **Renault Boreal**, **2 new models** will be launched

Total investment amount: \$400 million





EV Production: Commercial Vehicles

Türkiye's electrified vehicle production capacity is on the rise

LCV: Fully Electric



\$3 billion investment for the production of **fully electric Ford Transit in 2021 with a production capacity 210k/year**

Türkiye's **1st mass-produced** electric commercial vehicle

Ford's **1st fully electric** Transit model globally



CV: Fully Electric



1st battery-electric midibus was exported in 2021 (Novociti Volt)

2022-2024: modernization investment including EV production infrastructure, a new battery assembly area, BIG.e EV production line, and refurbished cataphoresis unit



MAN Truck & Bus's **1st production facility outside Germany and largest integrated bus factory.**

Only R&D center responsible for bus development as part of VW group (Traton) is in Türkiye



Ranked **8th** in **Europe's electric public transport market** with a 4.5% share (2024).

82% of all **Türkiye-origin electric public transport vehicles** registered in **Europe** belong to Karsan.





EV Production: Commercial Vehicles

Türkiye's electrified vehicle production capacity is on the rise

CV: Fully Electric

Otokar

Produced **Türkiye's 1st electric public transport bus** in 2012

Also focuses on **next-gen mobility** with **Level 4 autonomous** and **hydrogen fuel cell systems**.

Over \$310 million investment in R&D over the past decade



Battery management systems and **ECUs** are designed and developed in-house.

R&D activities focus on **EVs**, **energy storage technologies**, and **autonomous vehicles**.



BMC is one of Türkiye's largest military vehicle manufacturers, producing tactical wheeled vehicles, armored vehicles and the Altay main battle tank

Complete vehicle development in house

Diesel, CNG, fully electric options





Battery Production

Battery production ecosystem is emerging in Türkiye



20 GWh / year

Headquarter: Kocaeli/Türkiye

Togg–Farasis Energy
partnership

NMC Li-ion batteries



3 GWh / year

Headquarter: Ankara/Türkiye

Li-ion(LiFeP04) battery cells &
ESS

Mass production began by
2024

Turkish manufacturer



220 MWh / year

Headquarter: Kayseri/Türkiye

Li-ion cylindrical battery cells
production since 2022

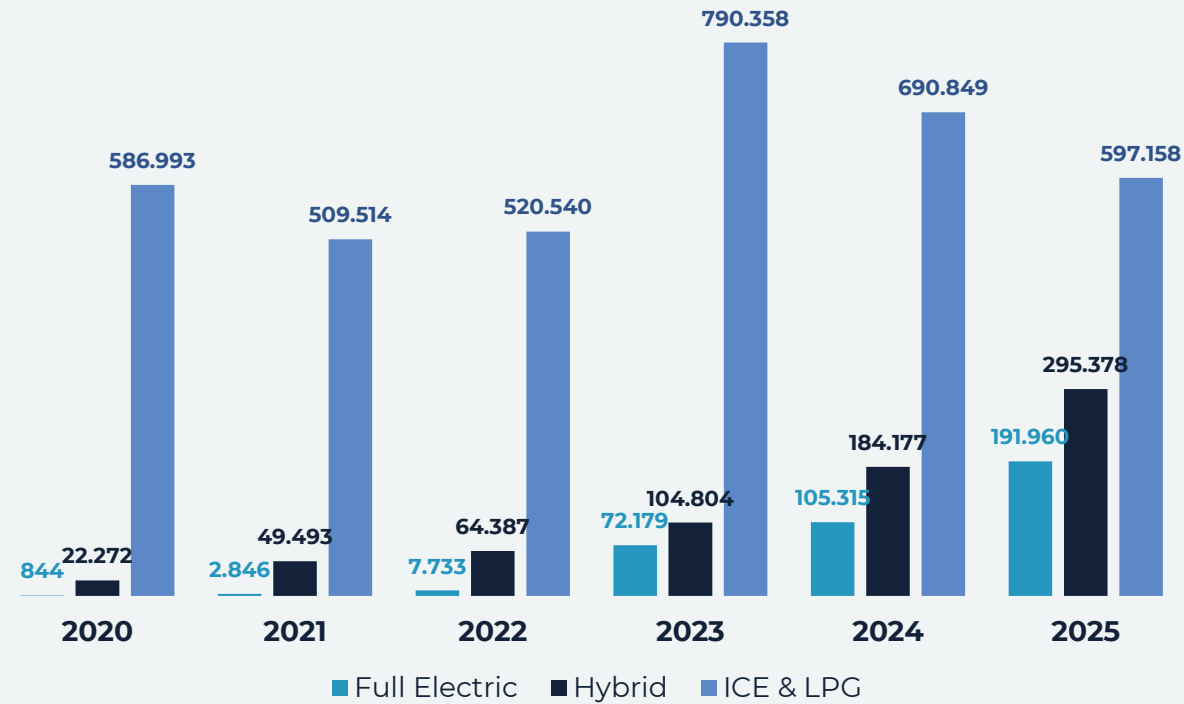
Turkish manufacturer
specialized in the defense
industry



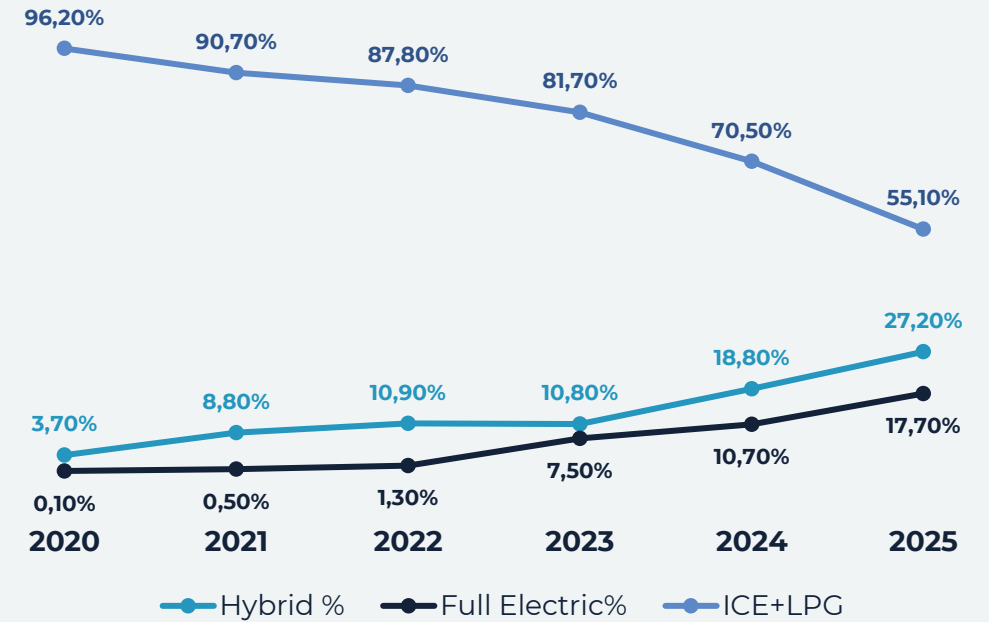
EV Sales in Türkiye

In 2025, nearly 1 out of 2 vehicles sold in Türkiye was electrified, hybrid or fully electric

Vehicle Sales by Powertrain Type (Unit, 2020-2025)



Vehicle Sales Share by Powertrain Type (2020-2025)

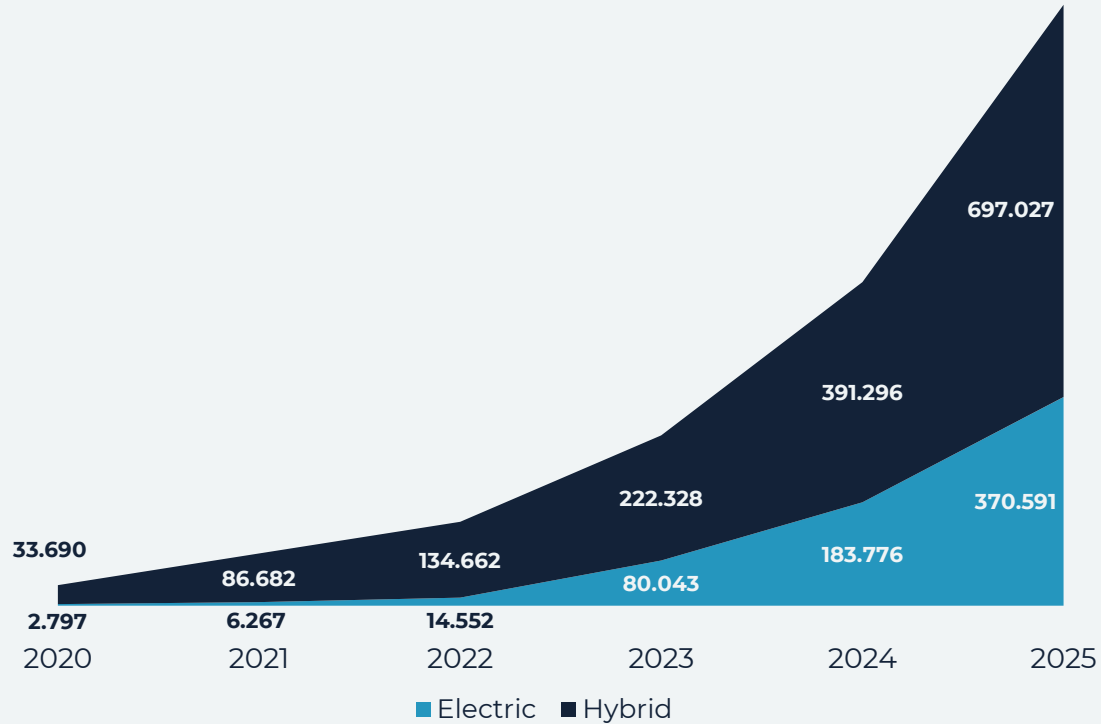




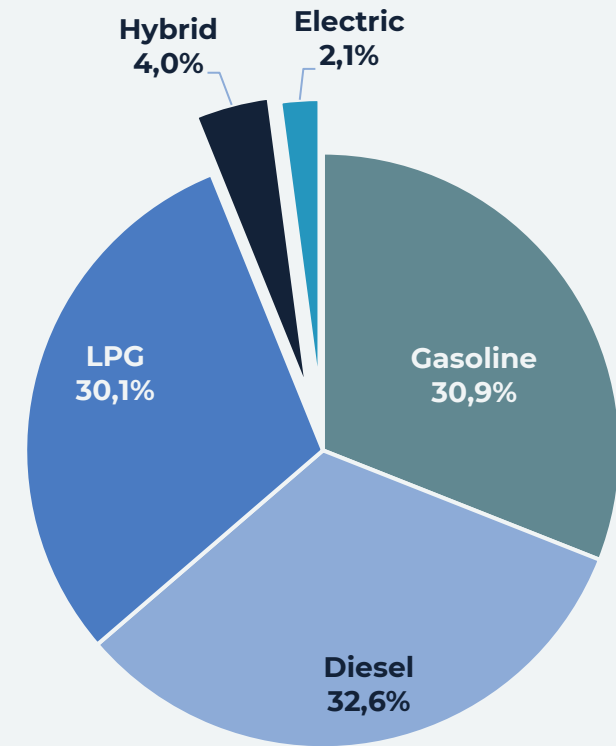
EV Stock in Türkiye

Conventional fuel types still dominate Türkiye's vehicle stock, but the growing number and share of EVs and hybrids show a clear shift toward electrification.

EV and Hybrid Vehicles in Traffic (2020-2025)



Fuel Type in Vehicles in Traffic (2025)

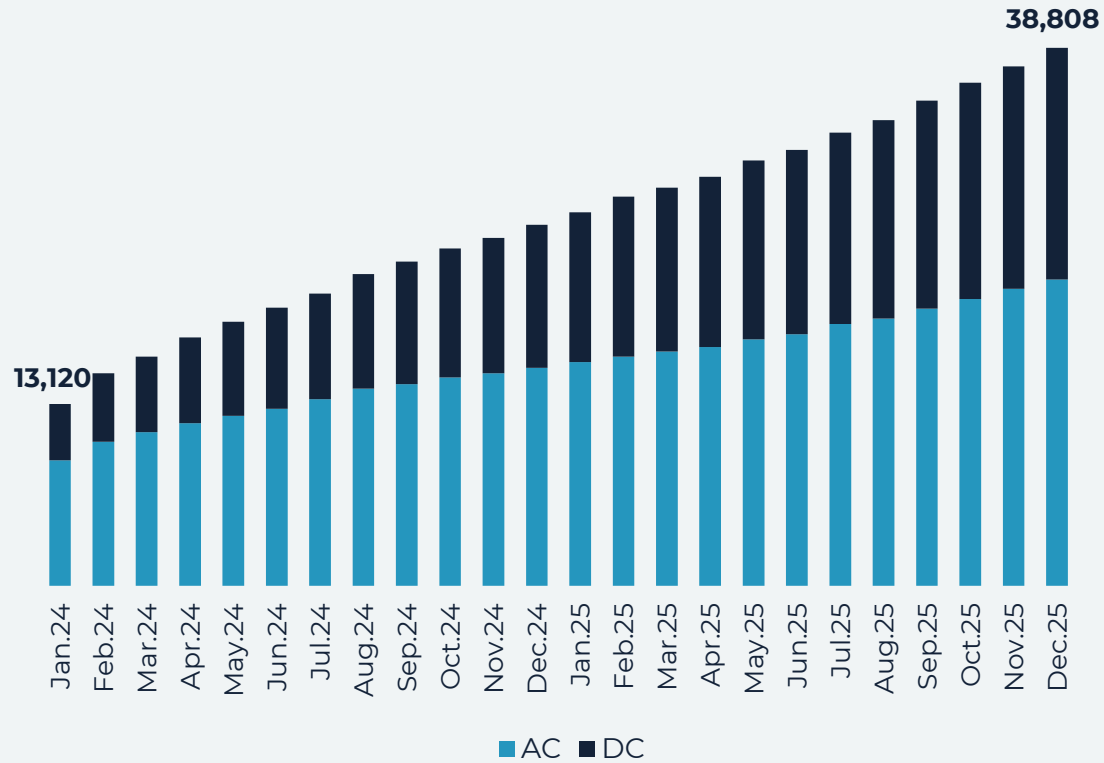




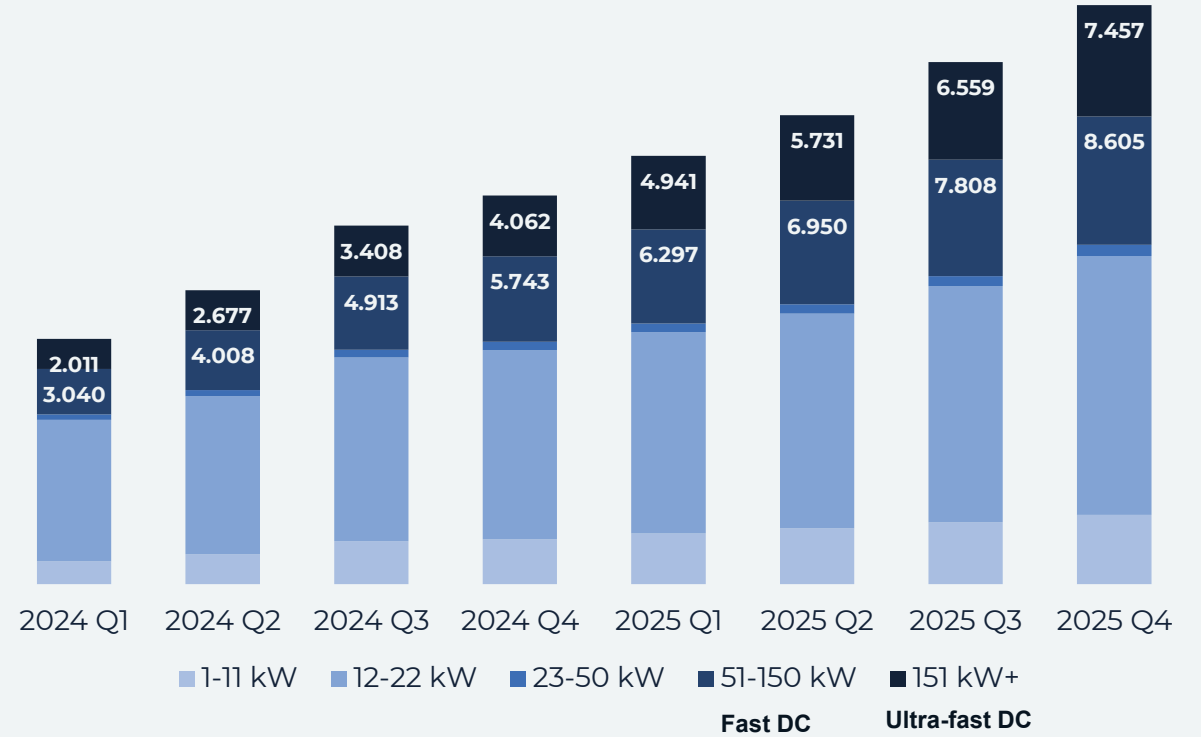
Charging Infrastructure

With over 38k sockets, Türkiye provides 1 charging point for every 9 EVs.

Total Number of Charging Points (Sockets)



Distribution of Charging Points by Power Capacity (Total #)





Domestic Production Supports



HIT-30 Electric Vehicle Call

Total Support Budget
\$5 Billion

Investment Qualifications



Investments with a
**minimum of 150K
vehicle** capacity



Limited to **BEV** and
PHEV production



Full Production
Investments



Establishment of
R&D center

Supports to be Provided

- ✓ **Customs tax exemption** for a certain number of vehicles and/or **grant supports** up to 15%
- ✓ **Tax incentive** up to 80%
- ✓ **Tax exemptions**
- ✓ Allocation of investment land
- ✓ Employment supports
- ✓ Financing supports



HIT-30 Battery Call

Total Support Budget
\$4.5 Billion

Investment Qualifications



Investments with a
**minimum of 5 GWh
capacity**



**Vehicle and storage
batteries**, active
materials



Production
including **cells**



Establishment of
R&D center

Supports to be Provided

- ✓ **Grant support** up to 25%
- ✓ **Tax support** up to 60%
- ✓ **Tax exemptions**
- ✓ Allocation of investment land
- ✓ Employment supports
- ✓ Financing supports

Up to \$6,000 grant per MWh until year 2030




PRESIDENCY OF
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**INVESTMENT &
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nexus
OF THE WORLD

