OTOMOTİV SANAYİİ DERNEĞİ
AUTOMOTIVE MANUFACTURERS ASSOCIATION

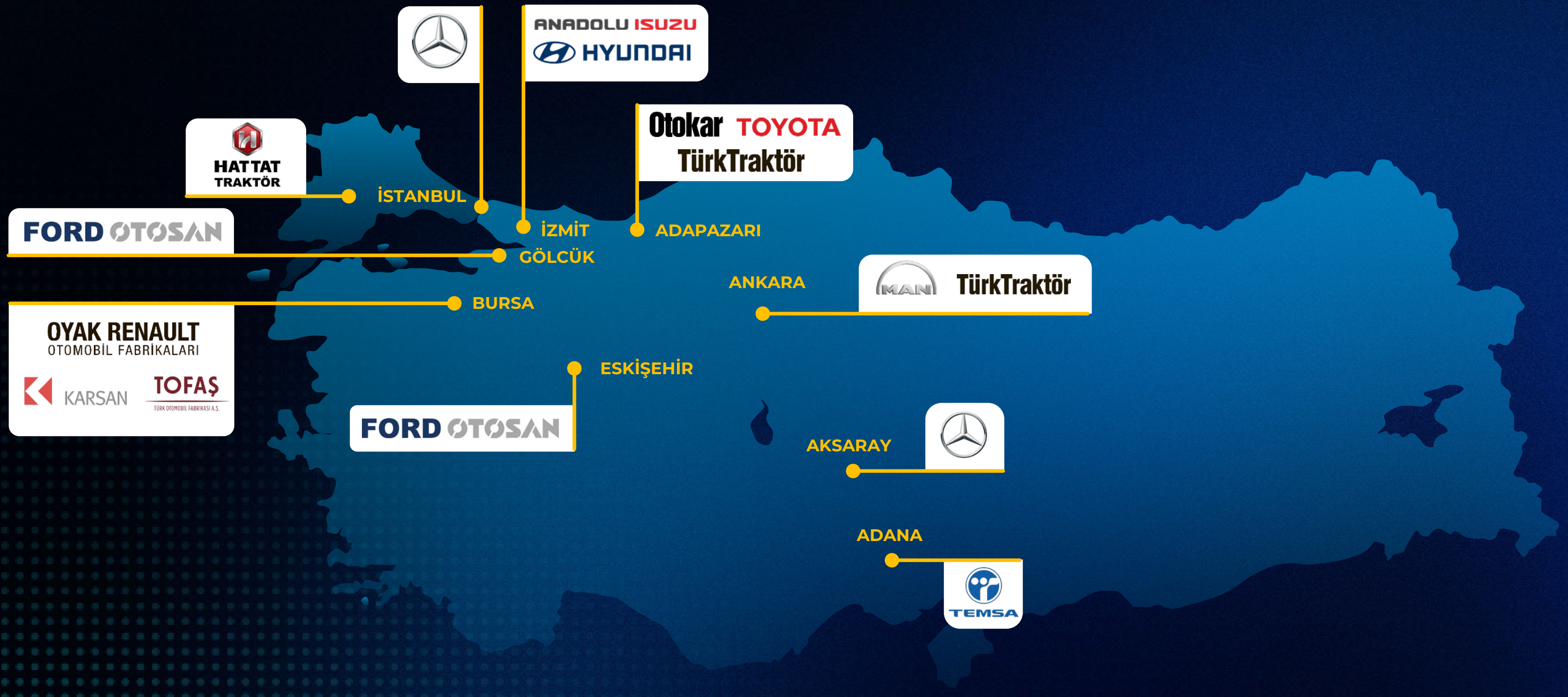
THE ASSOCIATION OF EUROPEAN VEHICLE LOGISTICS (ECG) SPRING CONGRESS

ISTANBUL
5 June 2026

OSD Members

13 Members, **17** Production Facilities **~ 2,2 Million** Total Production Capacity

Multi-brand Production Structure: Manufacturing for **19** Brands



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Automotive Industry in Türkiye – 2025

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Capacity
~2,2M

Production
1,42M
4% INCREASE

Investment
1,20BİL$
10 BİL $ in 10 YEARS

Contribution to Tax Revenues(1)
8,1%

Exports (UNIT)
1,06M
4% INCREASE

Exports (2) (VALUE)
41,5BİL$
12% INCREASE

Export Share (2)
18%
Leader Industry

(1) Total SCT and MTV revenues from the entire automotive market, excluding VAT and corporate tax
(2 Total of the main and supplier industries

Automotive Industry in Türkiye – 2025

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Direct Employment [1]
~59K
17% WOMEN'S EMPLOYMENT

Employment
550K +

R&D Employment [1]
~6K
1% INCREASE

Patent [1]
202
6% INCREASE

R&D Center [1]
18

R&D Expenditure [1]
25,4BİL TL
20% INCREASE

R&D Exports [1]
294M $
33% INCREASE

[1] Includes data of OSD Members

Turkish Automotive Industry in the Global Market – 2025

	Automobile	Light Commercial	Light Vehicles	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

Domestic Production Share in the Market – 2025

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Automobile	Light Commercial Vehicle	Truck	Bus	Tractor
30%	22%	59%	100%	90%
Years 2019 – 2020 41%	Year 2020 64%	Years 2020-2024 64%		

TOTAL 29%

Year 2020 46%

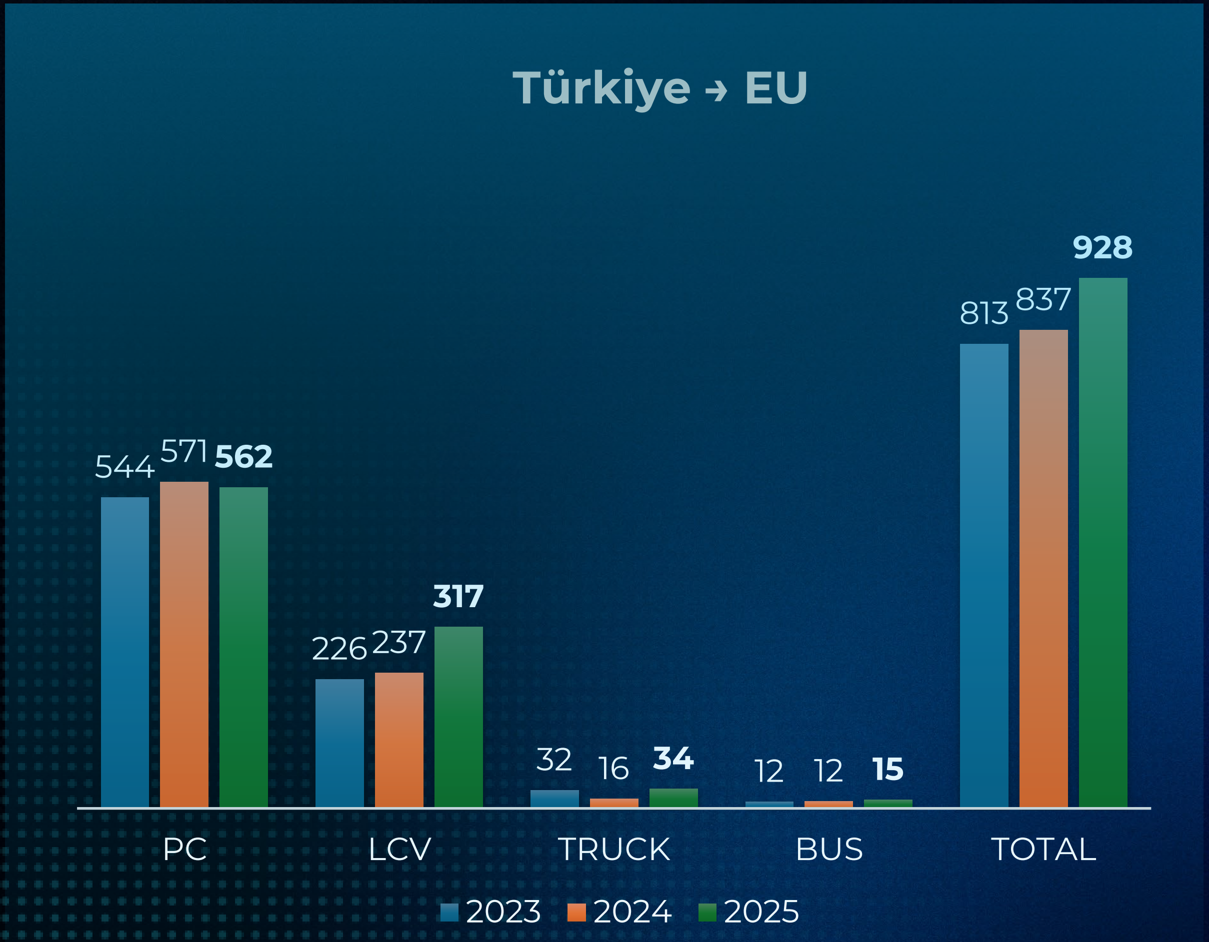
~ 70% of imported vehicles originate from the EU

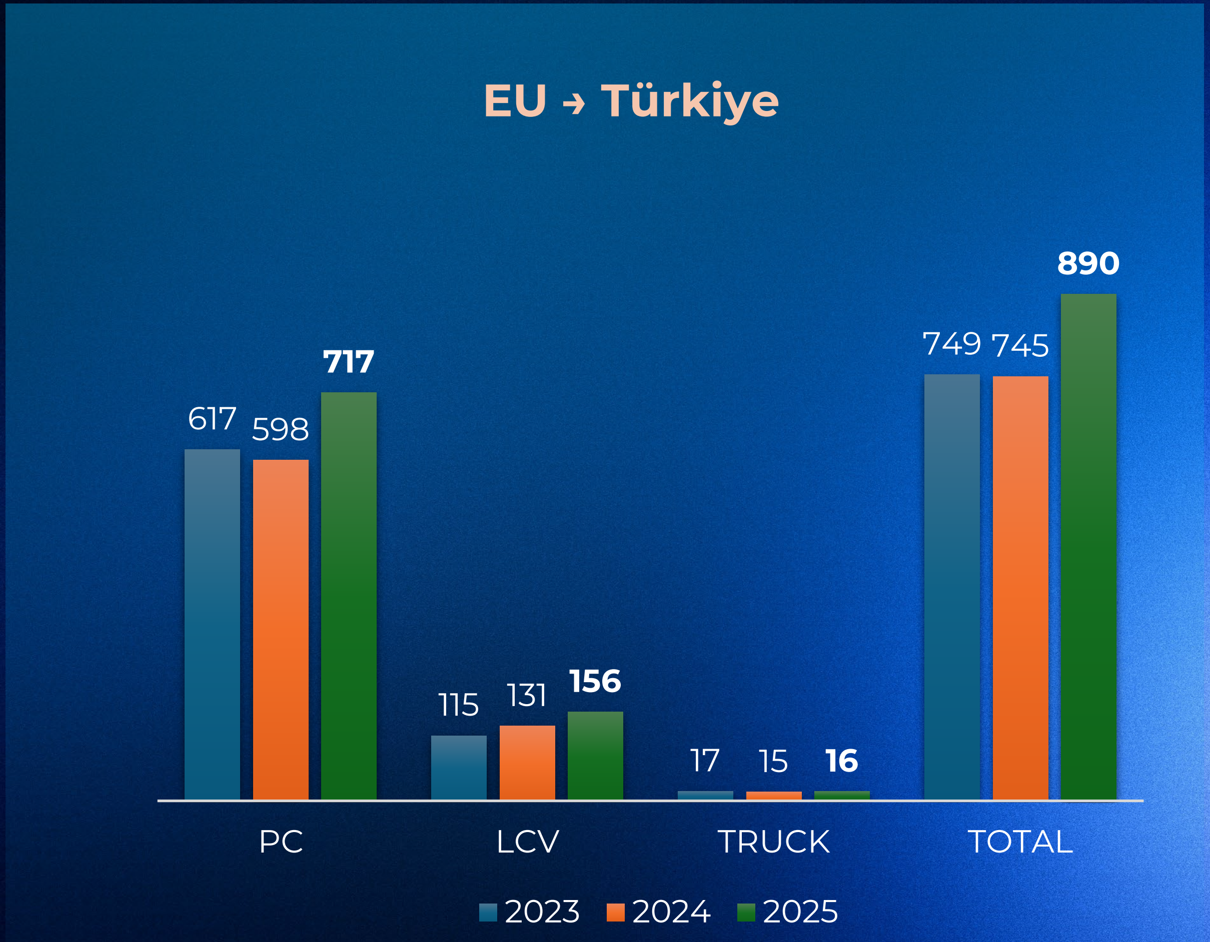
LIGHT VEHICLE MARKET

1	Germany	2.857.591
2	UK	2.020.520
3	France	1.632.154
4	Italy	1.525.722
5	Spain	1.148.650
6	**Türkiye**	**1.084.496**

Vehicle Flow Between Europe and Türkiye

Unit flows by vehicle segment, 2023–2025 (thousand units)





Source: ACEA, OIB, OSD, Trademap,

GLOBAL TRADE ENVIRONMENT

TRANSITION TO A NEW WORLD ORDER

COMPETITIVE PRESSURE

UNCERTAINITY

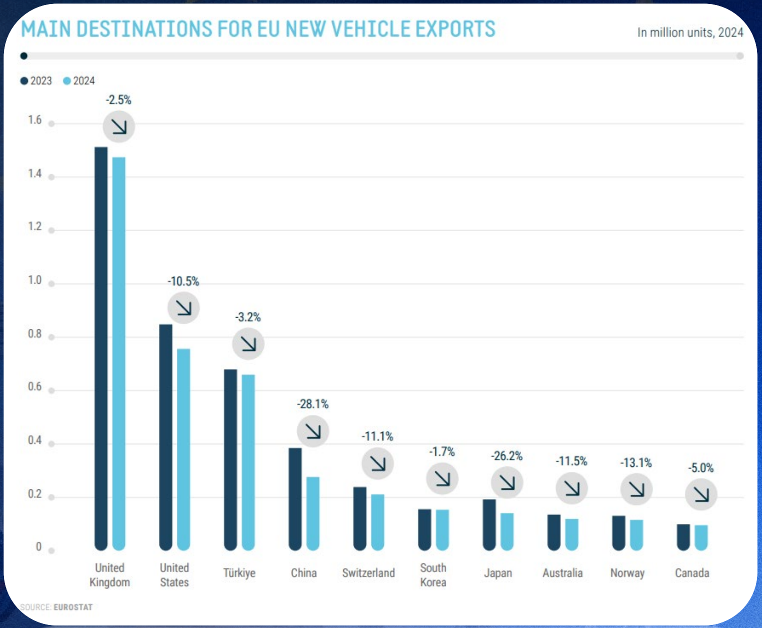
INCREASING SUPPLY CHAIN VULNERABILITY

PROTECTIONISM

TRANSITION FROM GLOBOLIZATION TO LOCALIZATION

A multi-layered, mutually beneficial integrated structure built over 30 years

- **Türkiye is the 3rd largest export market for the EU**
- **European brands account for more than 50% of the light vehicle market in Türkiye.**
- **Balanced bilateral trade**
- **Türkiye;**
  - **A complementary production hub for European manufacturers**
  - **A competitive, flexible, and reliable partner**



US Dolar		2024			2025		
	Country	**EU-->TR**	**TR-->EU**	**Trade Balance**	**EU-->TR**	**TR-->EU**	**Trade Balance**
87.00	Germany	6.589.778.998	3.149.450.571	3.440.328.427	8.672.417.569	4.778.191.792	3.894.225.777
	France	2.511.611.063	4.075.271.542	-1.563.660.479	2.614.732.281	4.747.961.720	-2.133.229.439
	Spain	4.344.404.942	2.130.641.442	2.213.763.500	4.904.316.572	3.028.485.719	1.875.830.853
	Italy	1.238.630.232	3.185.104.484	-1.946.474.252	1.198.274.145	3.034.424.319	-1.836.150.174
	EU27	**21.842.108.087**	**21.213.554.857**	**628.553.230**	**26.340.828.589**	**25.866.996.955**	**473.831.634**

Europe – Türkiye Automotive Logistics

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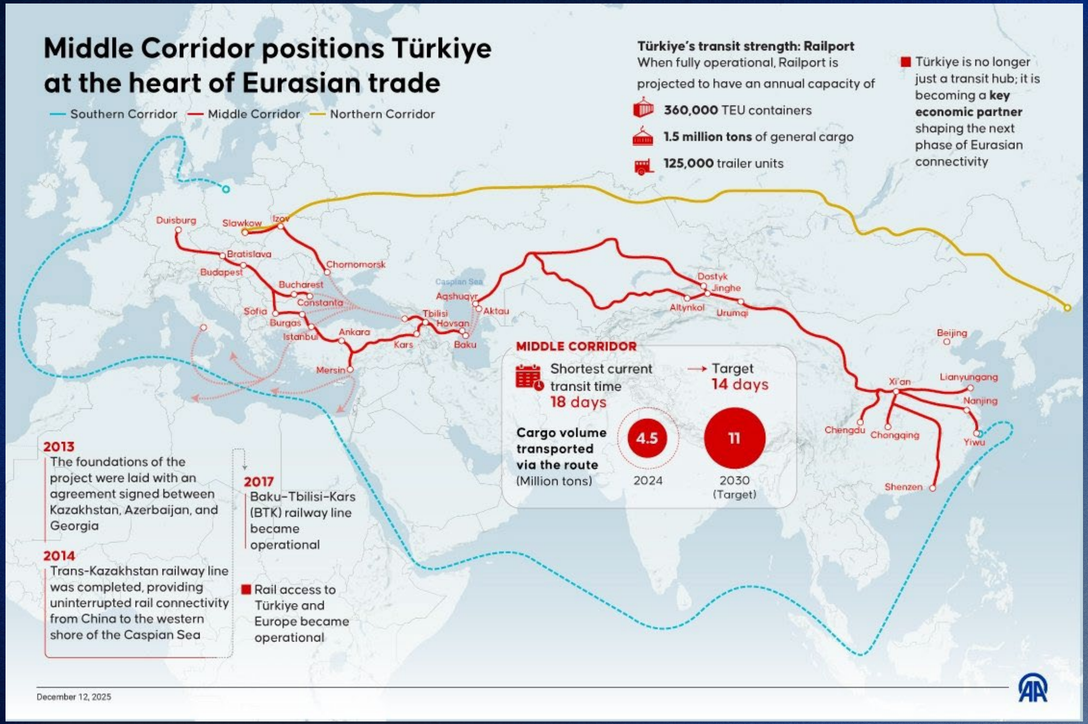
- **Mutually balanced trade generates high two-way automotive logistics flows**
- **Nearshoring between Türkiye and the EU;**
  - **reduces logistics costs and lead times,**
  - **improves supply chain reliability,**
  - **enables faster response to market demand,**
  - **strengthens overall competitiveness and supply chain resilience.**
- **Türkiye's position at Middle Corridor supports supply chain security and enhance the competitiveness of Eurasian trade.**
- **Access to intermodal transportation modes, including road, rail, sea, and air further strengthens logistics flexibility.**



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The Europe–Türkiye logistics corridor is more than a transit route; it is a strategic asset underpinning the competitiveness and resilience of the automotive ecosystem.

Europe – Türkiye Automotive Logistics

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OPERATIONAL CONSTRAINTS

Road transport quota and permit regimes

Restrictions on driver mobility and visa procedures

Increasing freight costs due to closure of Straight of Hormuz

Long waiting time at European borders (Kapıkule)

Slow pace of digitalization and data integration

FUTURE CHALLANGES

Electric vehicle logistics

Europe’s decarbonization targets

Geopolitical risks and supply chain security

IAA Draft from the Automotive Perspective

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The IAA regulates the conditions under which electric, plug-in hybrid, or fuel cell vehicles can benefit from various incentive mechanisms.

Public Procurement

All Segments

Financial Support for Corporate Fleets

Automobile & LCV

CO_2 Super Credits

Small EV's M1e

Other Public Incentives

All Segments

Public Procurement:
3-4% of EU Market
45-50% of EU Bus Market

Corporate Fleets:
60% of EU Auto Market
90% of EU LCV Market

To sustain mutual economic benefits and strengthen the EU's competitiveness and resilience, the Turkish automotive industry should be included within the scope of "Union Origin"

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THANK YOU