

Household Appliances Industry in Türkiye

2026

INVEST.GOV.TR



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE

INVESTMENT &
FINANCE OFFICE



Invest in Türkiye

Assist you before, during and after your entry into Türkiye

**Private Sector Approach with
Public Sector Capabilities**



**A Government Agency
Reporting to the President**



**Acting as a
Solution Partner**



**INVEST IN
TÜRKIYE**

Custom
Cons

Coord
with
Stake

Invest in Türkiye

Assist you before, during and after your entry into Türkiye



Customized Consulting



Business Facilitation



Tailor Made Delegation Visits



Partnership Development Assistance



Coordination with Stakeholders



Site Selection Support



Project Launch



Ongoing Support



Household Appliances

Agenda



Why Türkiye?

White Goods

Small Home
Appliances

HVAC

Investment
Ecosystem

Household Appliances

Agenda



Why Türkiye?

White Goods

Small Home
Appliances

HVAC

Investment
Ecosystem

Robust Economy

Track record growth and bright future with proven resilience

 **12th largest economy
in the World** 

Ranking of Economies By GDP at PPP

2003	2024
1st USA	1st CHINA
2nd CHINA	2nd USA
3th JAPAN	3th INDIA
4th GERMANY	4th RUSSIA
5th INDIA	5th JAPAN
6th FRANCE	6th GERMANY
7th RUSSIA	7th BRAZIL
8th UK	8th INDONESIA
9th ITALY	9th FRANCE
10th BRAZIL	10th UK
11th MEXICO	11th ITALY
12th SPAIN	12th TÜRKİYE
13th INDONESIA	13th MEXICO
14th CANADA	14th S. KOREA
15th S. KOREA	15th SPAIN
16th S. ARABIA	16th CANADA
17th AUSTRALIA	17th EGYPT
18th TÜRKİYE	18th S. ARABIA

Robust Economy

Ranking of Economies By GDP at PPP

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2024

- 1st CHINA
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2026

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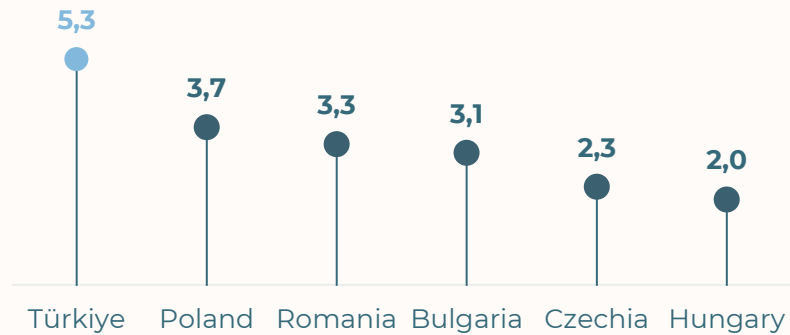
2052

- 1st CHINA
- 2nd INDIA
- 3th USA
- 4th INDONESIA
- 5th TÜRKİYE
- 6th JAPAN
- 7th GERMANY
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Robust Economy

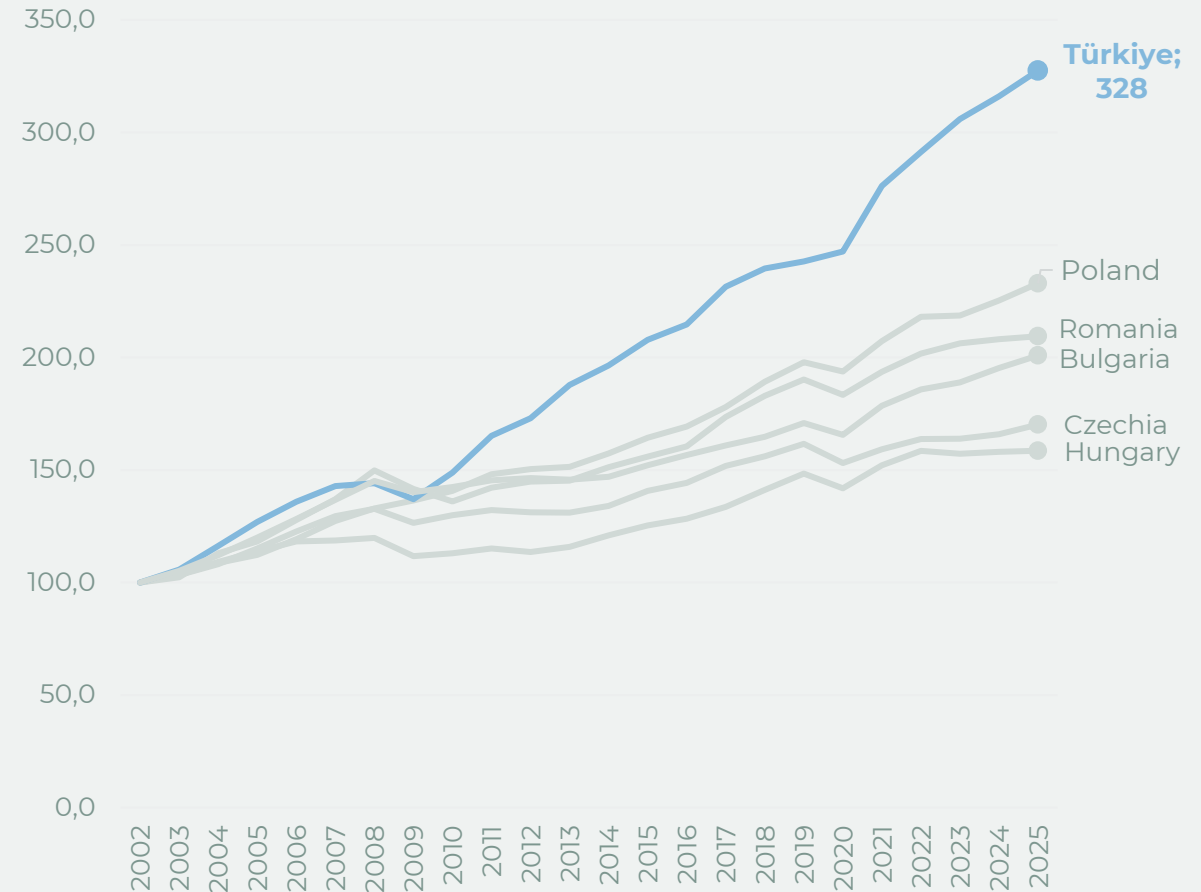
Track record growth and bright future with proven resilience

Average Annual GDP Growth (%)
2002-2025



Source: TurkStat, IMF

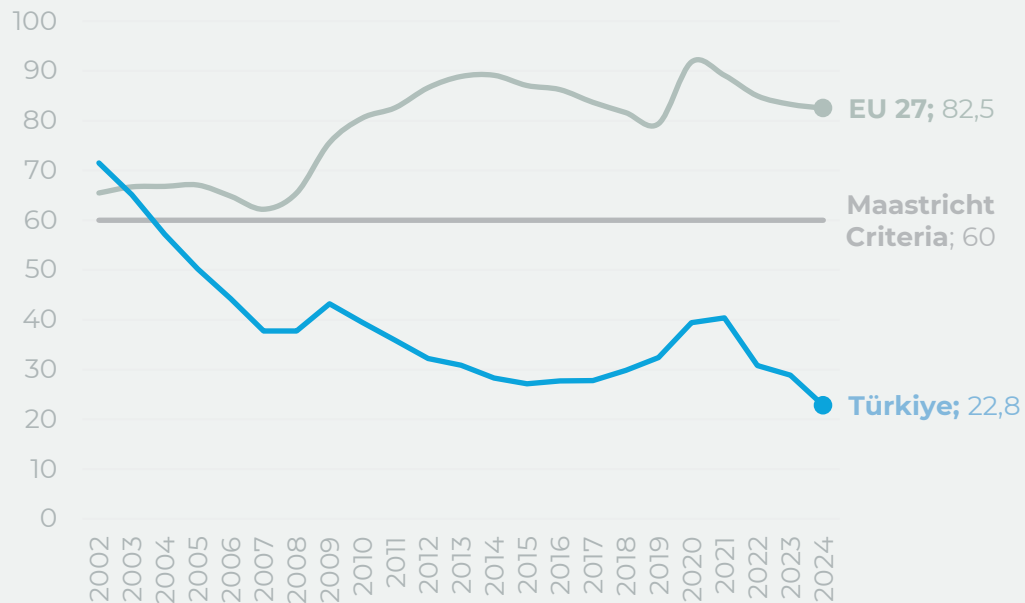
REAL GDP GROWTH
(INDEX: 2002=100)



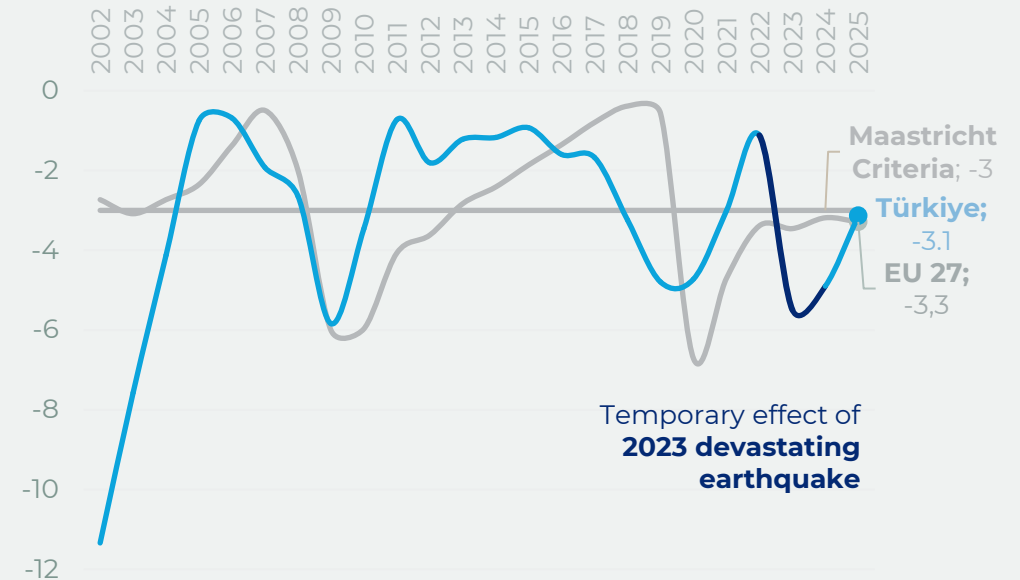
Robust Economy

Strong macroeconomic fundamentals based on successful public finance management

Gross Public Debt Stock as % of GDP



Budget Balance as % of GDP

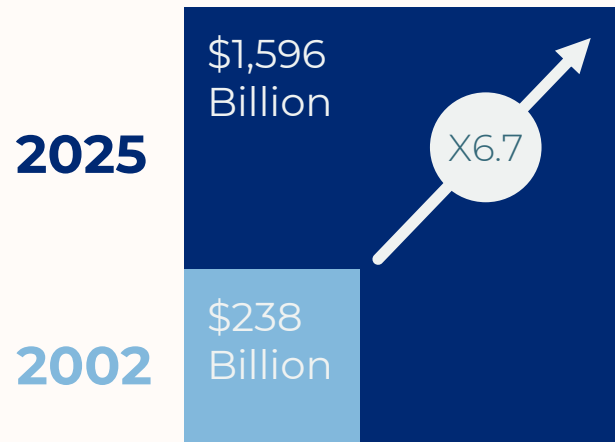


Robust Economy

A seven fold increase in the size of the economy over the past 23 years

Turkish economy has grown nearly 7-fold over the past 23 years and is promising to be on the growing trend

GDP at current prices, \$ Billion



Source: IMF, TurkStat

Robust domestic market and entrepreneurial private sector spurred investments and exports

Contribution to GDP 2002-2025

+72%

Domestic Consumption



+30%

Investment Expenditures



+22%

Exports



Robust Economy

Robust domestic market and entrepreneurial private sector spurred investments and exports

Contribution to GDP 2002-2025 (in chain linked volume)

+72%

Domestic
Consumption



+30%

Investment
Expenditures



+22%

Exports



-3%

Stocks



-21%

Imports

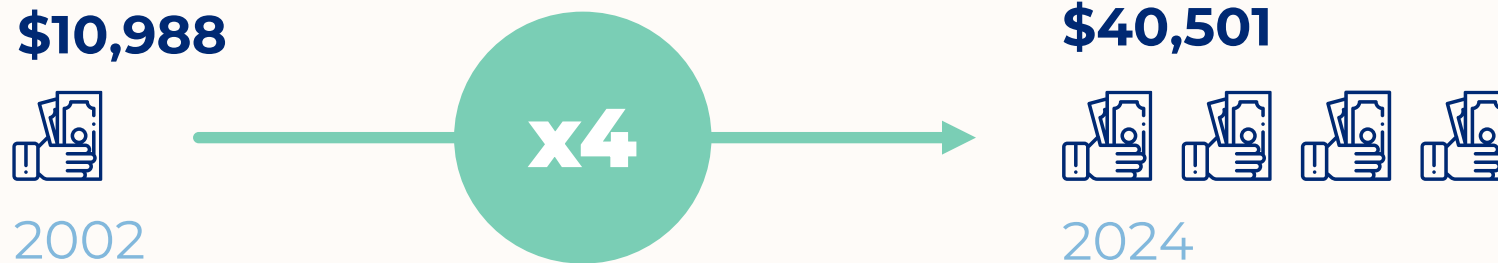


Domestic Market

Impressive economic growth leading to a sizable middle class with increasing purchasing power

Income per capita

GDP per capita, current prices at purchasing power parity



Income per capita

GDP per capita, current prices at purchasing power parity

\$10,988



2002

x4

\$40,501



2024

Stock of Automobiles

Millions of passenger cars

2002 **4.6M** 

2025 **17.4M** 

Turkish Aviation Passenger

Millions of passengers

2002 **34M** 

2025 **247M** 

Domestic Market

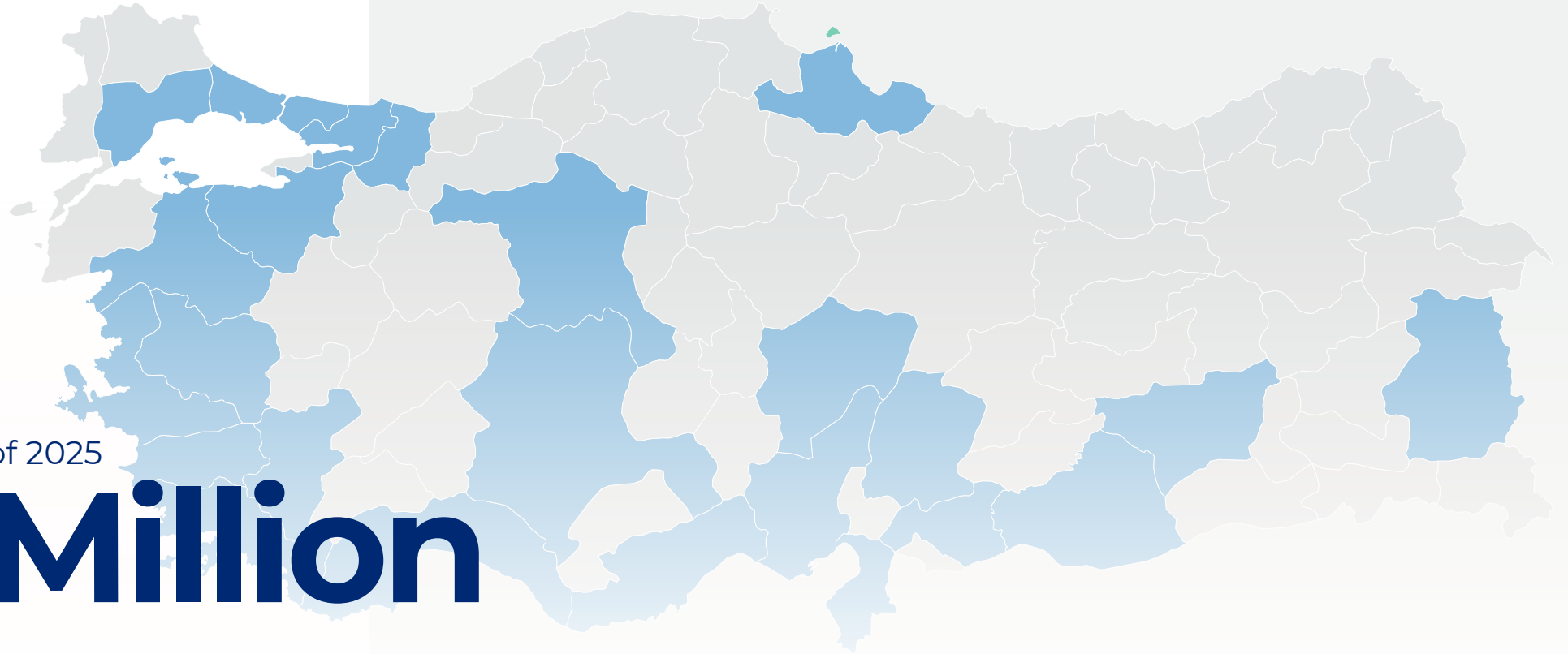
Domestic market further supported by emerging urban centers

Half of the population is under the age of

34.9

24 urban centers with populations over

1 Million

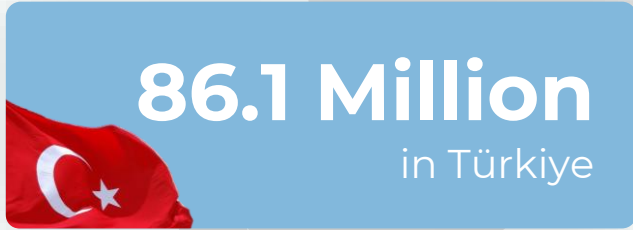


Total Population as of 2025

86.1 Million

Domestic and Accessible Markets

Domestic Market + EU Market + Free Trade Area



Domestic and Accessible Markets

Domestic Market + EU Market + Free Trade Area



86.1 Million
in Türkiye



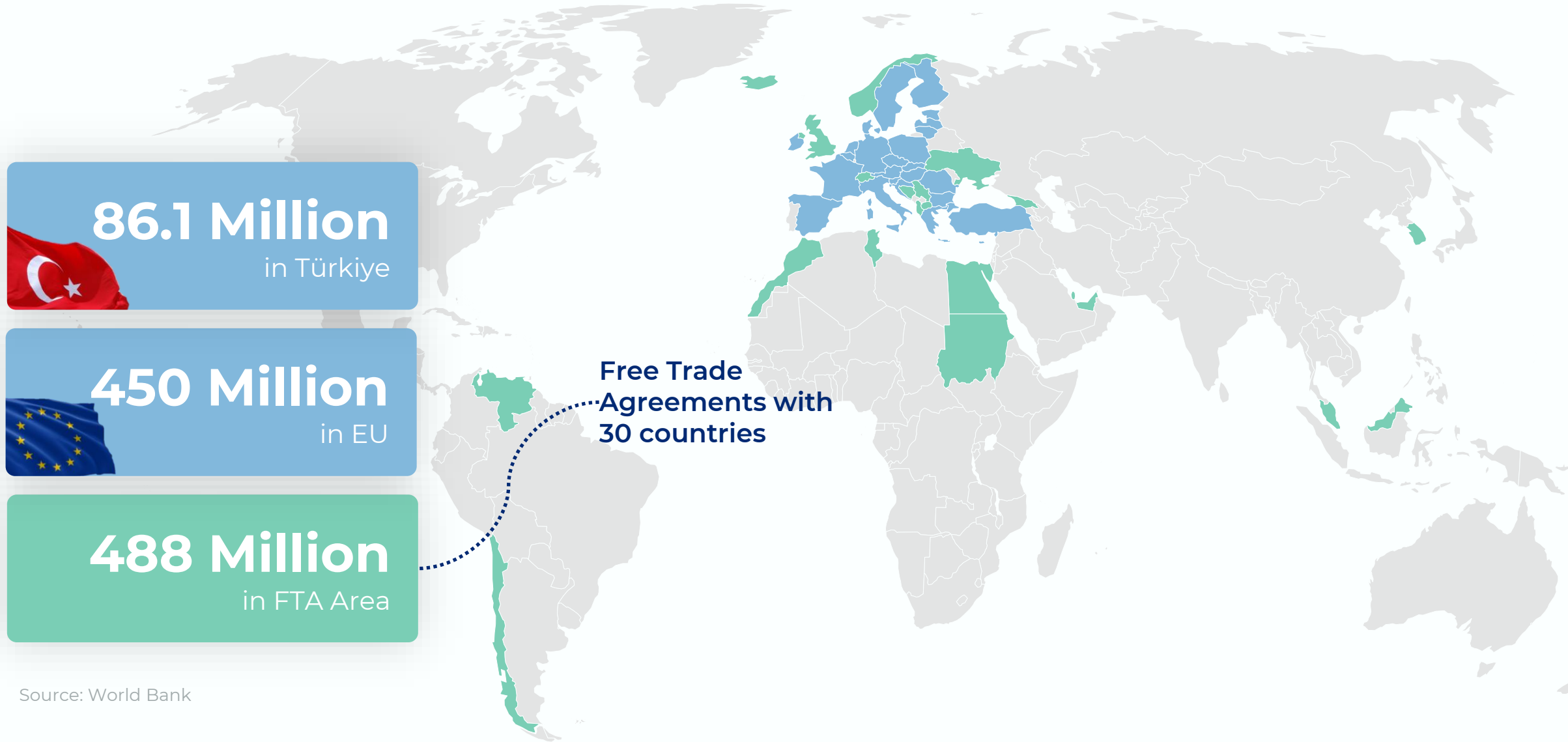
450 Million
in EU

488 Million
in FTA Area

Customs Union with the EU allows direct access to the EU Market

Domestic and Accessible Markets

Domestic Market + EU Market + Free Trade Area



86.1 Million

in Türkiye



450 Million

in EU



488 Million

in FTA Area

Free Trade
Agreements with
30 countries

Domestic and Accessible Markets

Domestic Market + EU Market + Free Trade Area



86.1 Million

in Türkiye



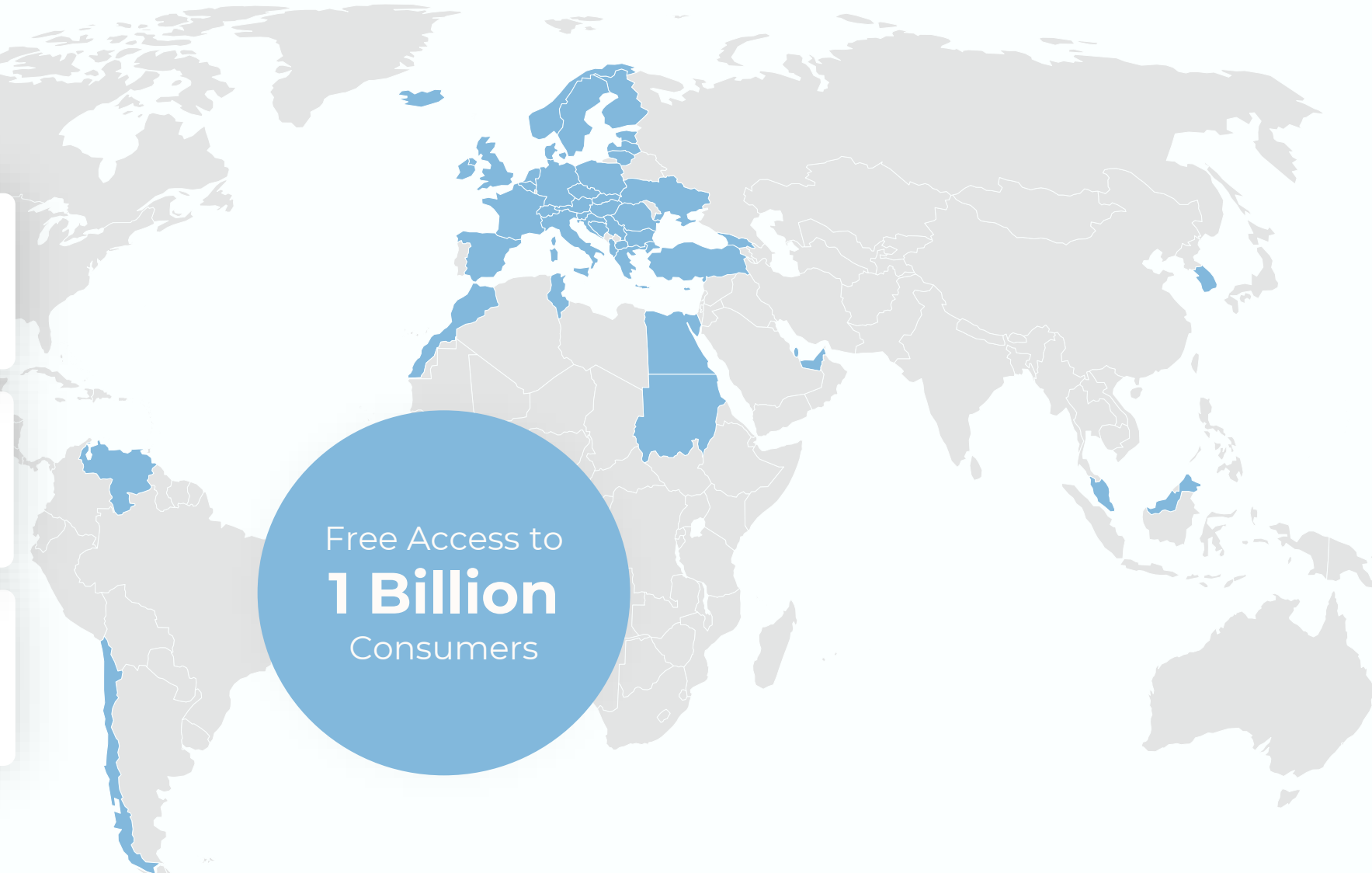
450 Million

in EU

488 Million

in FTA Area

Free Access to
1 Billion
Consumers





Strategic Location

Hub for multinationals to manufacture, export and manage

Working Hours
Intersect with 16
Time Zones

Strategic Location

Hub for multinationals to manufacture, export and manage

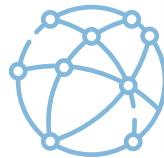
At the Crossroads of Major Markets

\$32.1T GDP, 1.3 billion people, \$10.3 trillion import across Europe, MENA, and Central Asia — all within 4 hours of Türkiye.



Unmatched Global Connectivity

Turkish Airlines flies to 356 destinations in 132 countries.



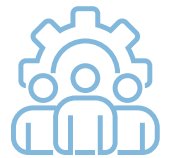
Manufacturing & Export Hub

Türkiye is a key base for multinationals with strong production and logistics.



Regional Operations Center

Ideal for managing, sourcing, and training across nearby markets.





Logistics Capabilities of Türkiye

Europe | Sea / Export





Logistics Capabilities of Türkiye

Africa | Sea / Export





Logistics Capabilities of Türkiye

North America | Sea / Export

VANCOUVER
37 DAYS

SEATTLE-TACOMA NORTHWEST
28 DAYS

LOS ANGELES
27 DAYS

VERACRUZ
33 DAYS

SAVANNAH
18 DAYS

MIAMI
24 DAYS

NORFOLK
16 DAYS

MONTRÉAY
17 DAYS

NEW JERSEY
14 DAYS

VALENCIA
SINES





Logistics Capabilities of Türkiye

Europe 1 Road / Export





Logistics Capabilities of Türkiye

Asia | Road / Export



TBILISI
2 DAYS

BAKU
3 DAYS

TEHRAN
4 DAYS

BAGHDAD
6 DAYS

AMMAN
6 DAYS

RIYADH
8 DAYS

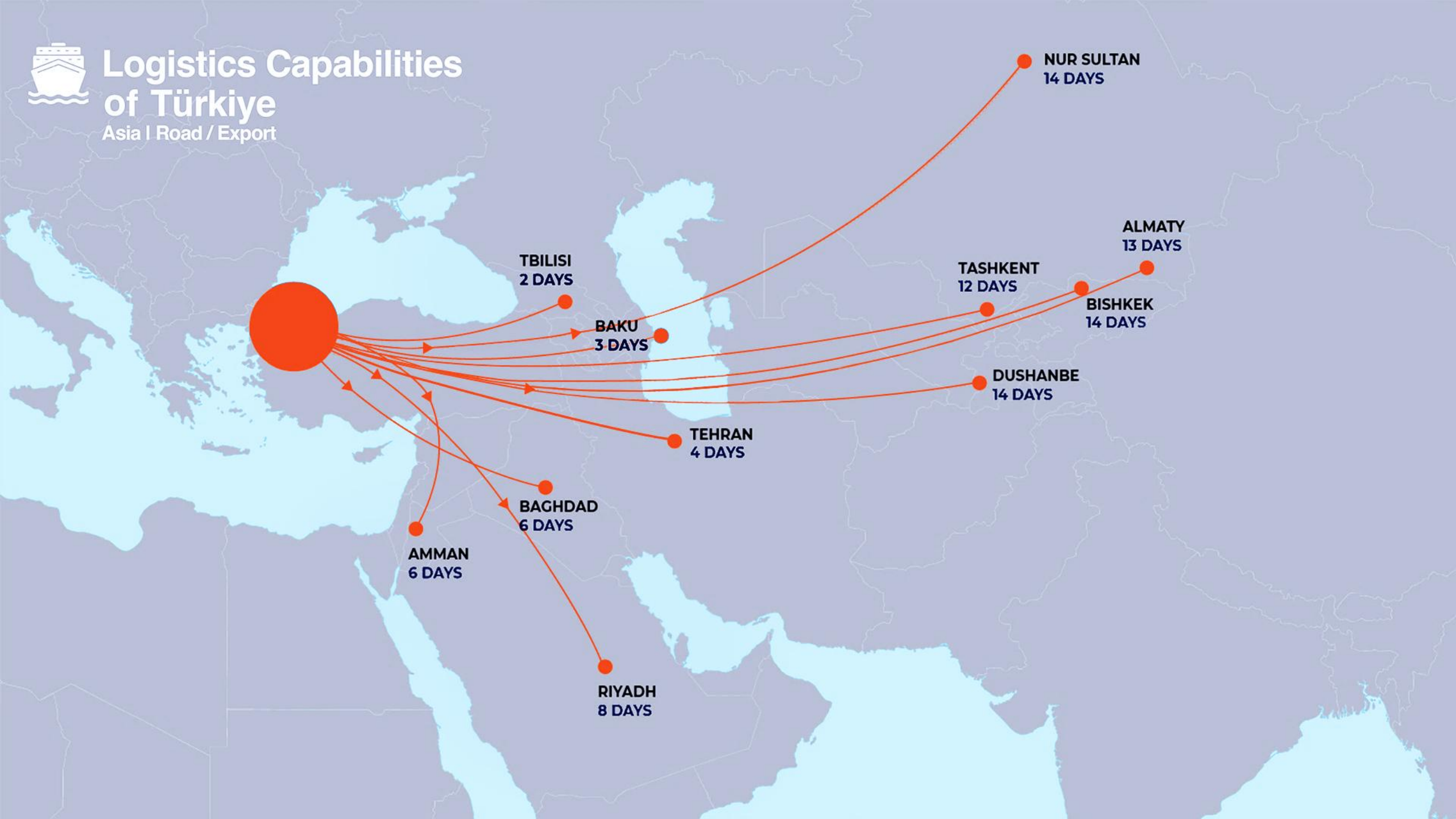
TASHKENT
12 DAYS

DUSHANBE
14 DAYS

NUR SULTAN
14 DAYS

BISHKEK
14 DAYS

ALMATY
13 DAYS



Household Appliances

Agenda



Why Türkiye?

White Goods

Small Home
Appliances

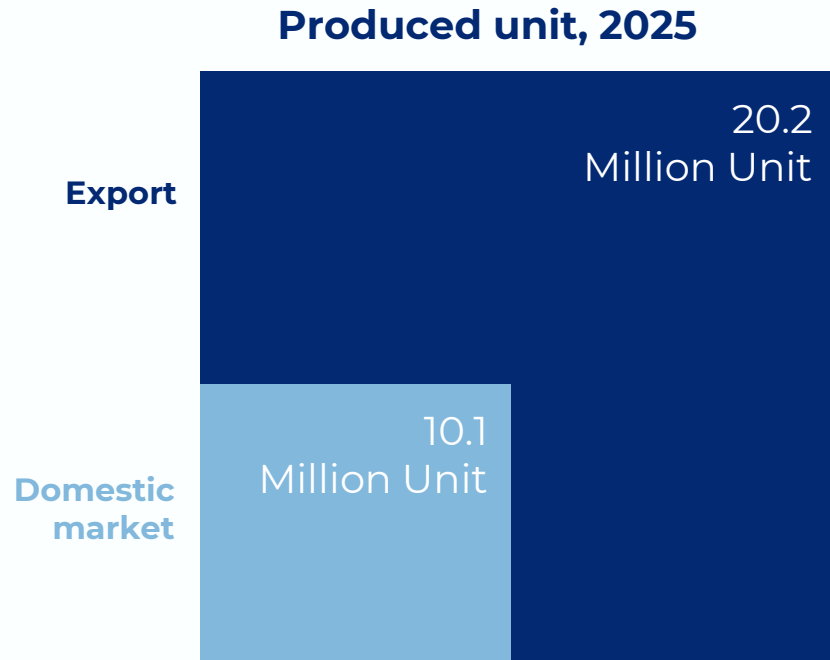
HVAC

Investment
Ecosystem

White Goods

60.000 direct, 600.000 indirect employment.

The household appliances sector, with the suppliers, is Türkiye's fourth largest industrial sector in terms of both production and export.



~60%

White Goods
Localization
Rate



75%

Export Rate



White Goods

In 2024, the group of six sales (refrigerator, freezer, laundry, washing, oven, drier) grew by **9.6%** on unit basis and by **57.2%** on turnover basis.

~60%

White Goods
Localization
Rate



75%

Export Rate



57%

Growth in
Turnover
(Group of Six)



93%

Increase in
Dryers Group
(Domestic Sales)



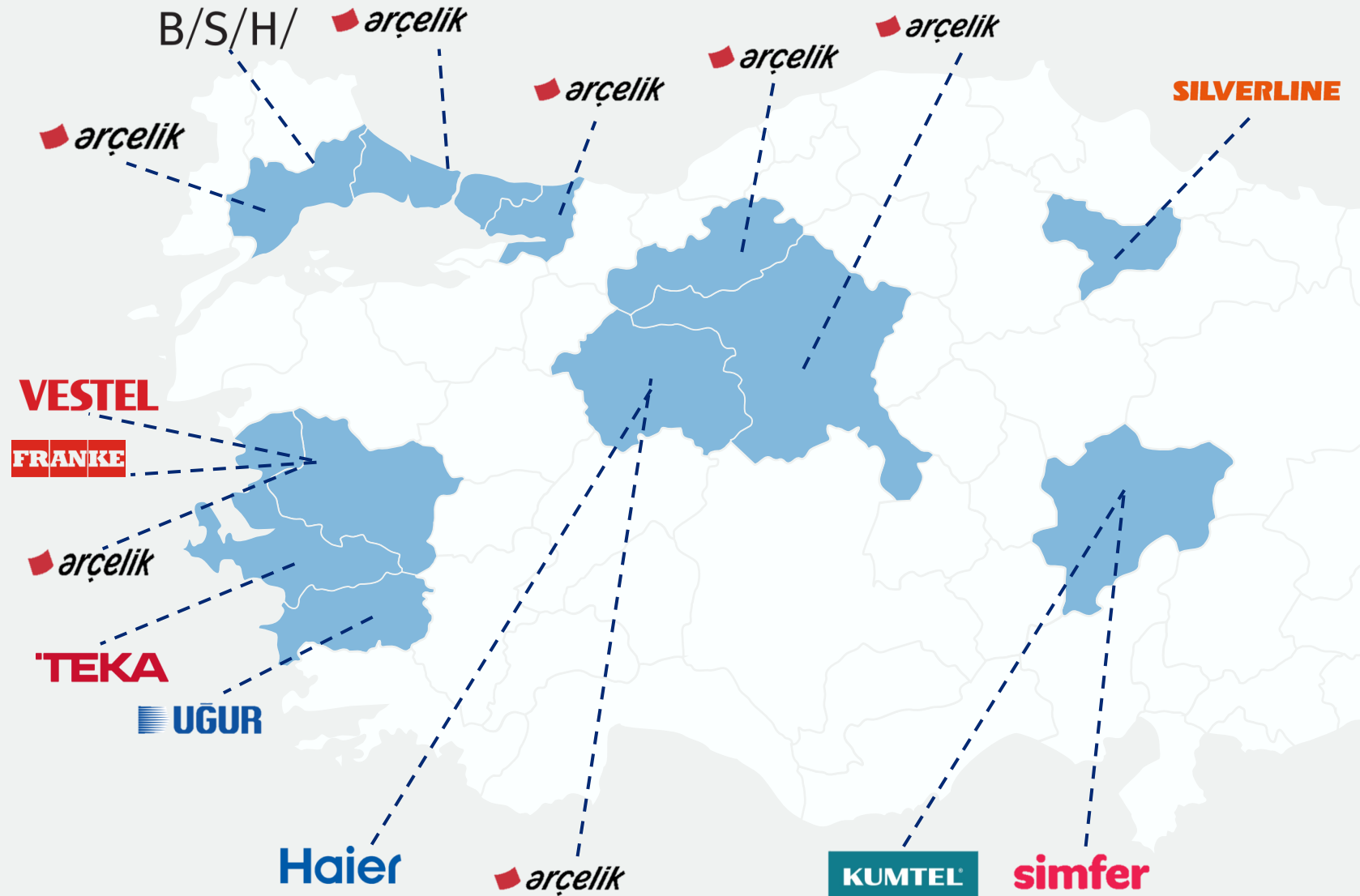
White Goods Manufacturers



White Goods

Manufacturing capabilities across different regional corridors

Leading white goods manufacturers are mainly concentrated in **Western Anatolia**.



White Goods

Major White Goods manufacturers in Türkiye



Product(s):
Group of Six

B/S/H/

Product(s):
Refrigerator,
Washing,
Laundry

VESTEL

Product(s):
Group of Six

Haier

Product(s):
Cooking
Group,
Dryer



Product(s):
Freezer

FRANKE

Product(s):
Hood

KUMTEL

Product(s):
Cooking Group

simfer

Product(s):
Cooking
Group,
Freezer

SILVERLINE

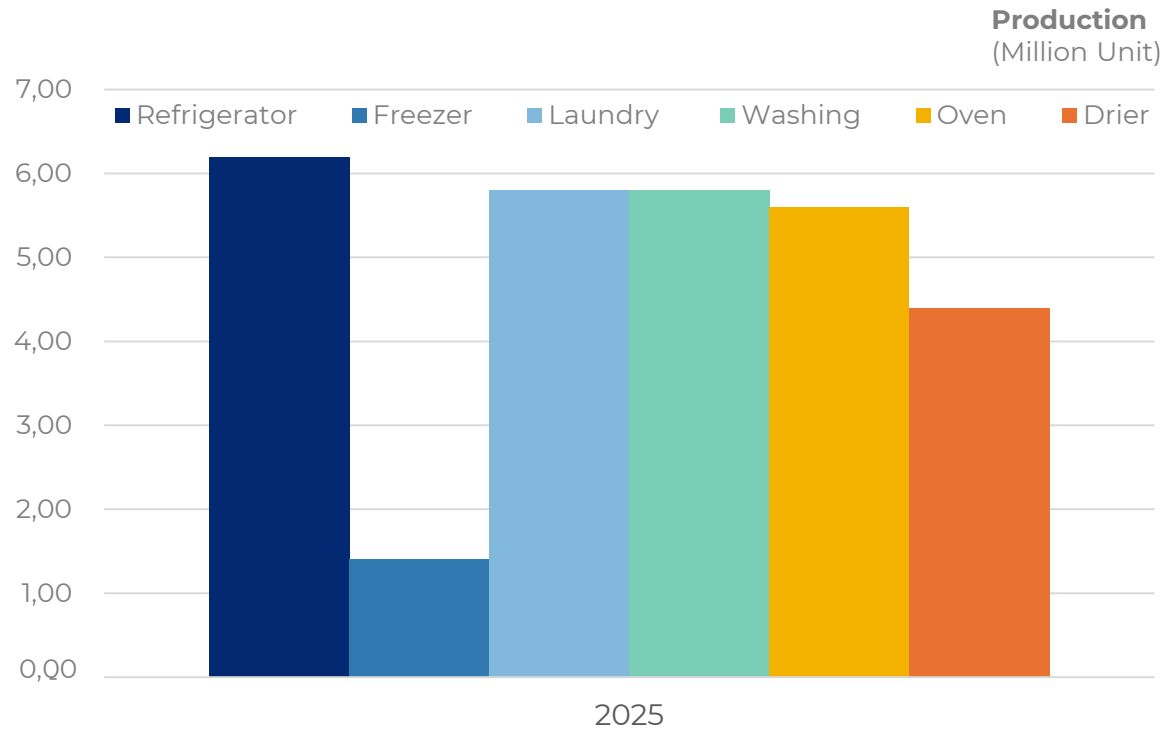
Product(s):
Cooking Group
Refrigerator

'TEKA

Product(s):
Hood

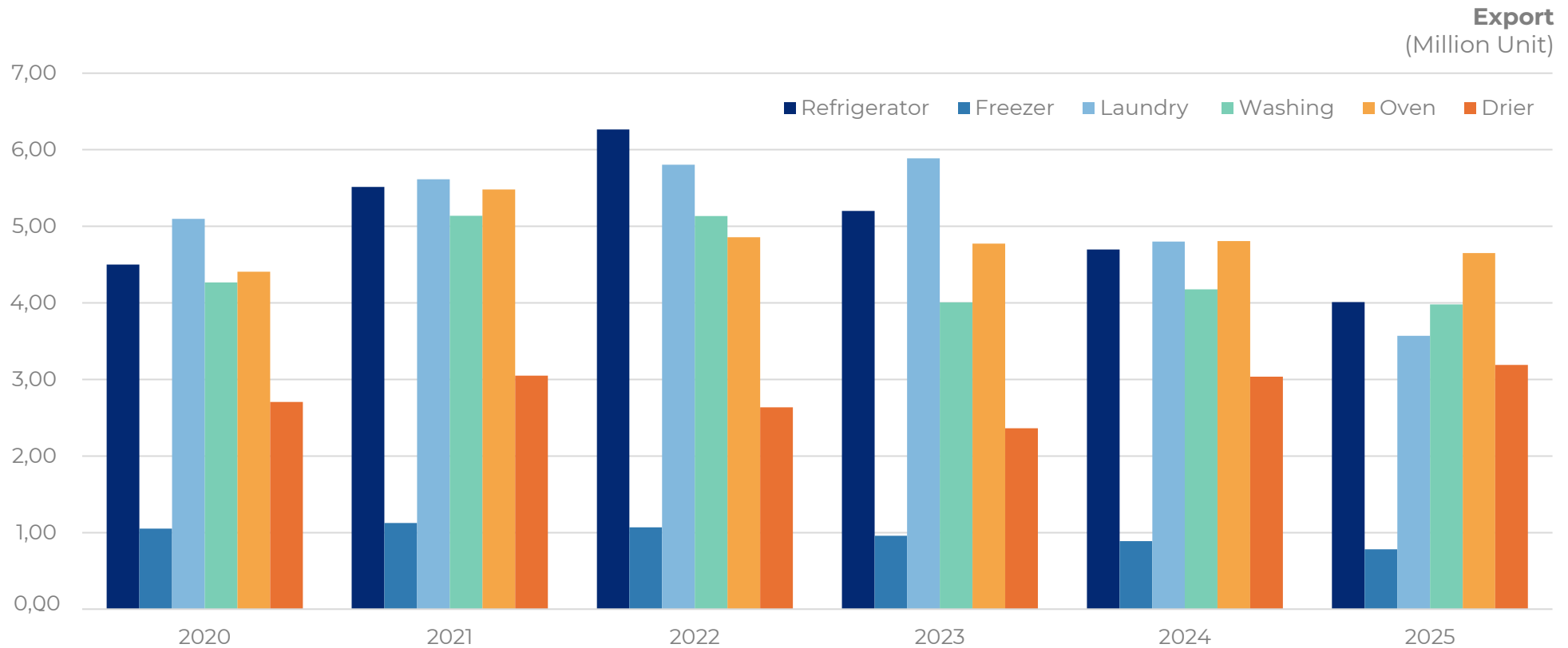
White Goods

Major players benefiting and contributing to Türkiye's white goods ecosystem



White Goods

Enlarging, emerged export markets, diverse and dynamic local market strengthens resilience



Source: TURKBESD, Official Press Releases

White Goods

From resilience to records: Türkiye's household appliances exports soar post-pandemic



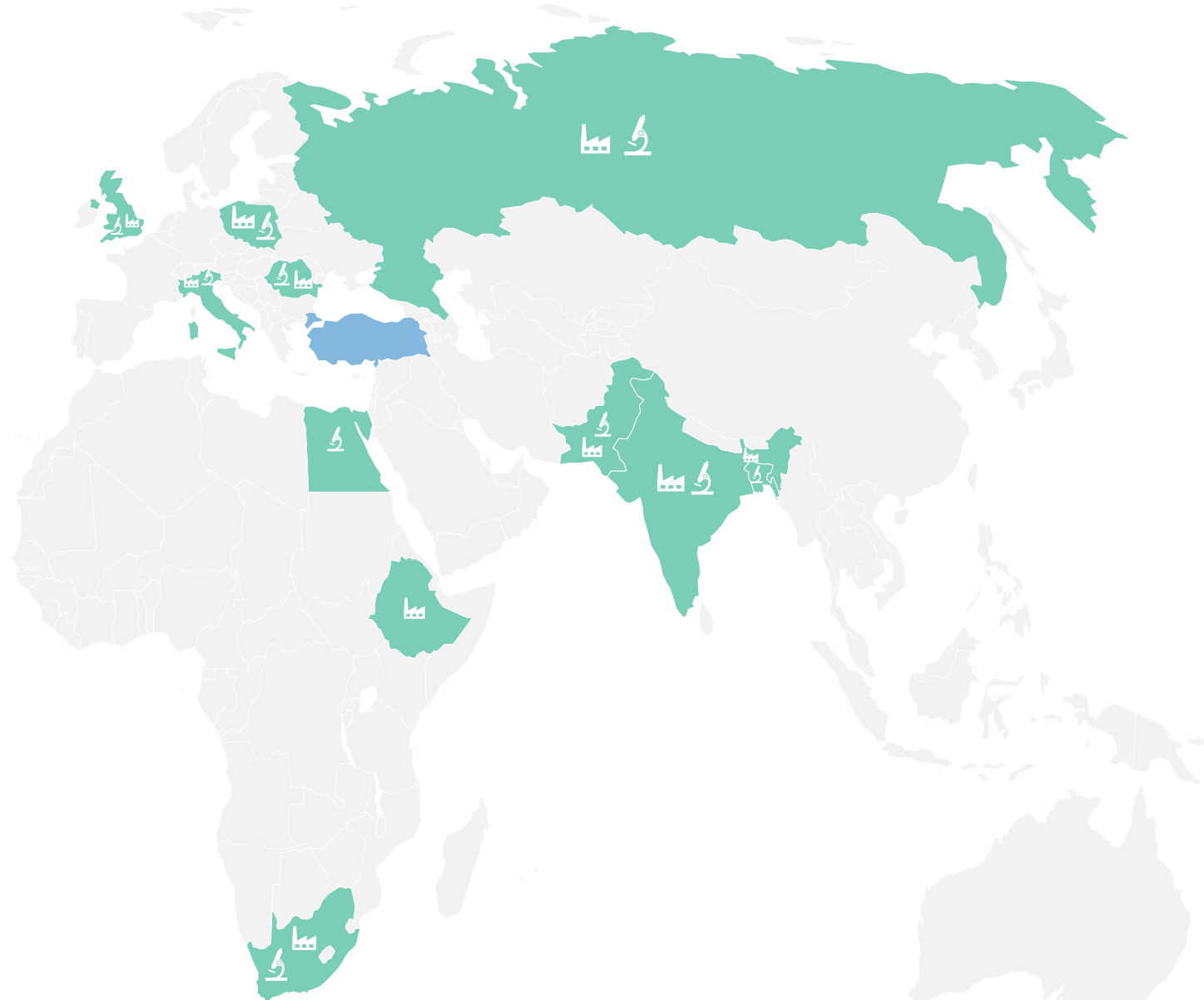
Source: Comtrade, Ministry of Trade

Turkish White Goods Manufacturers

Manufacturing Leader of Eastern Hemisphere

Turkish White Goods Manufacturers has +15 subsidiaries worldwide.

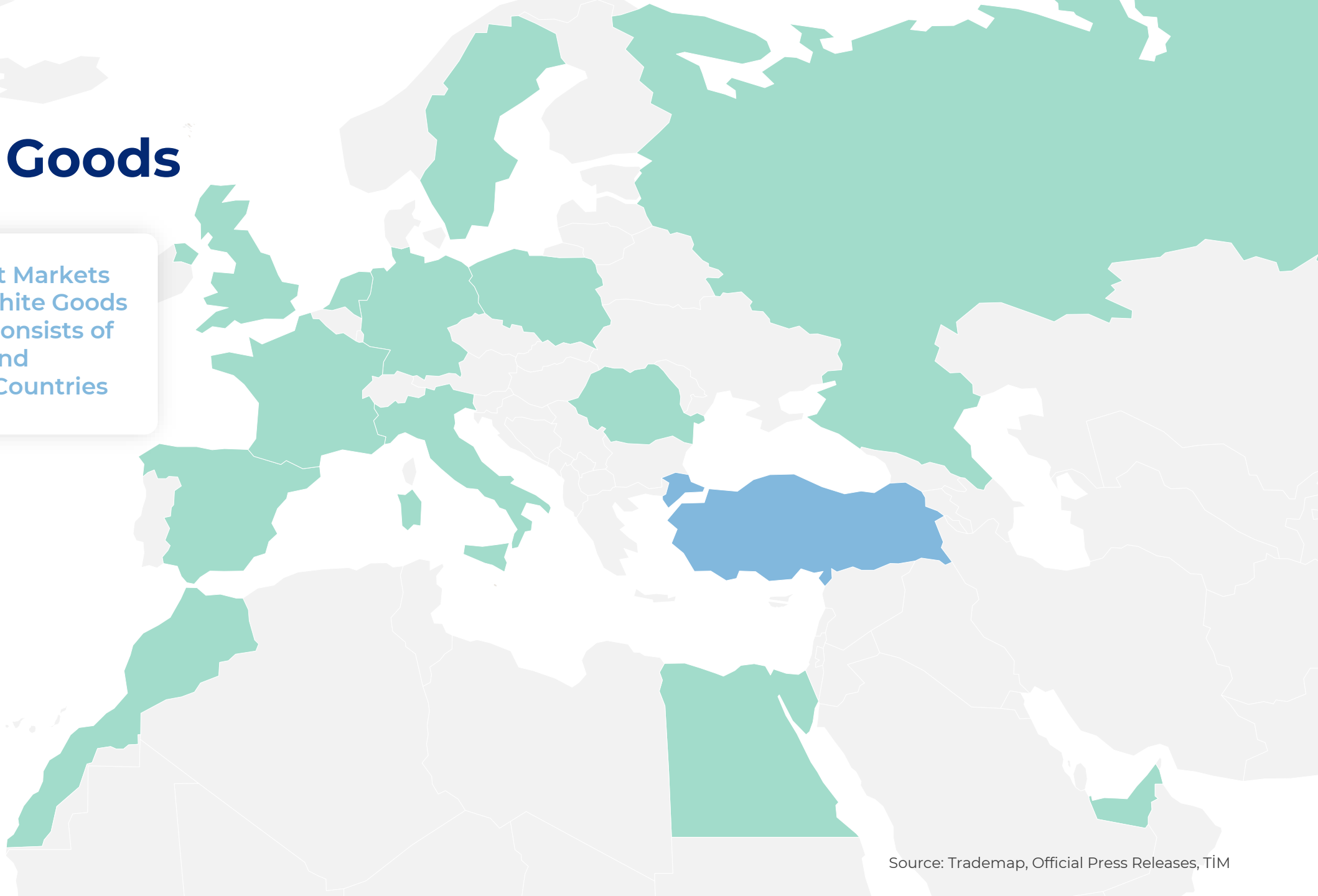
Producing and conducting R&D in +10 countries, including: Poland, Russia, South Africa, Egypt and Bangladesh.



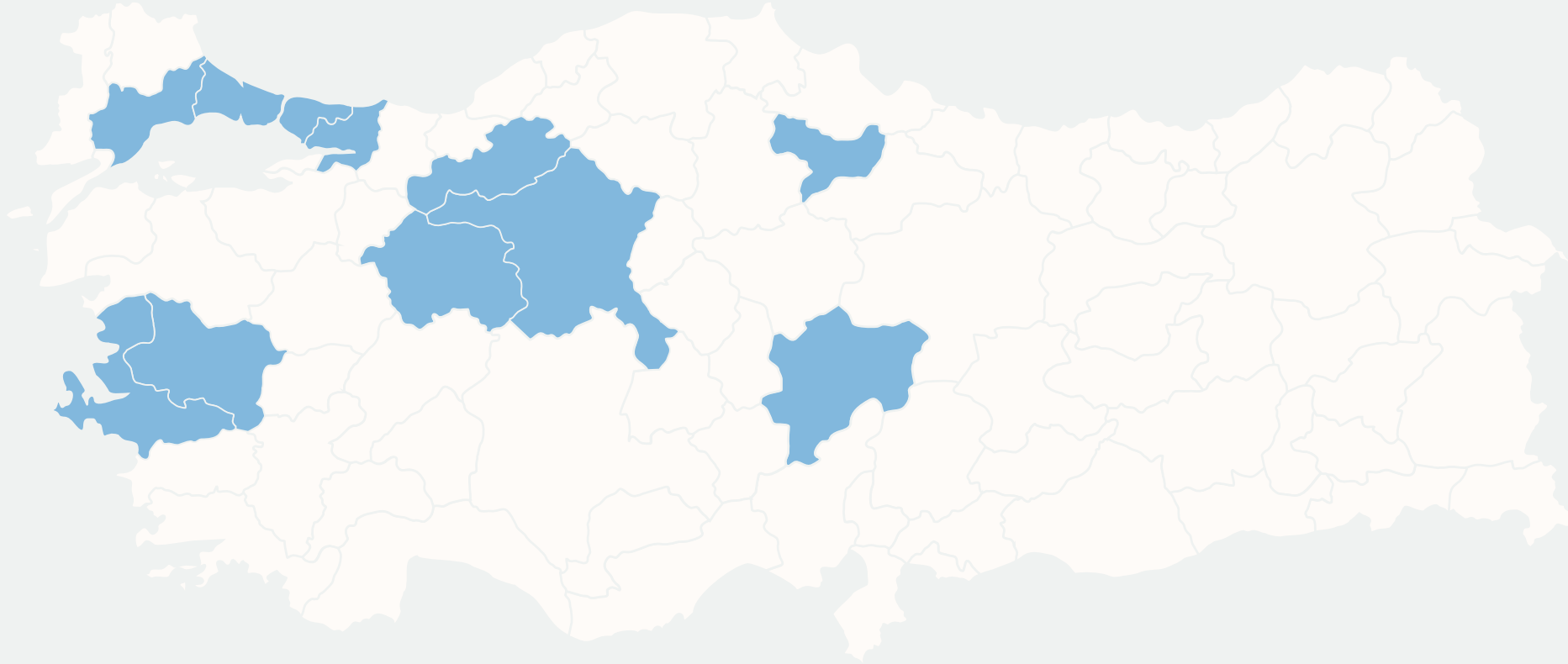
Source: Annual Activity Reports

White Goods

Top 15 Export Markets
of Turkish White Goods
Ecosystem Consists of
Developed and
Developing Countries



White & Brown Goods R&D Centers



Haier

 arçelik

B/S/H/

VESTEL


KORKMAZ

SILVERLINE

İhlas 
Ev Aletleri

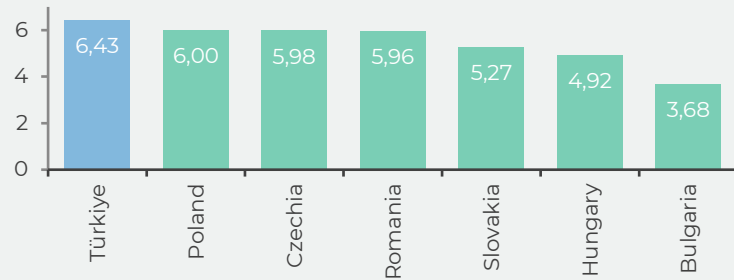
öztiryakiler

Well-developed R&D workforce

White & Brown Goods R&D Centers are widespread through country, while the majors are located in the Western Anatolia

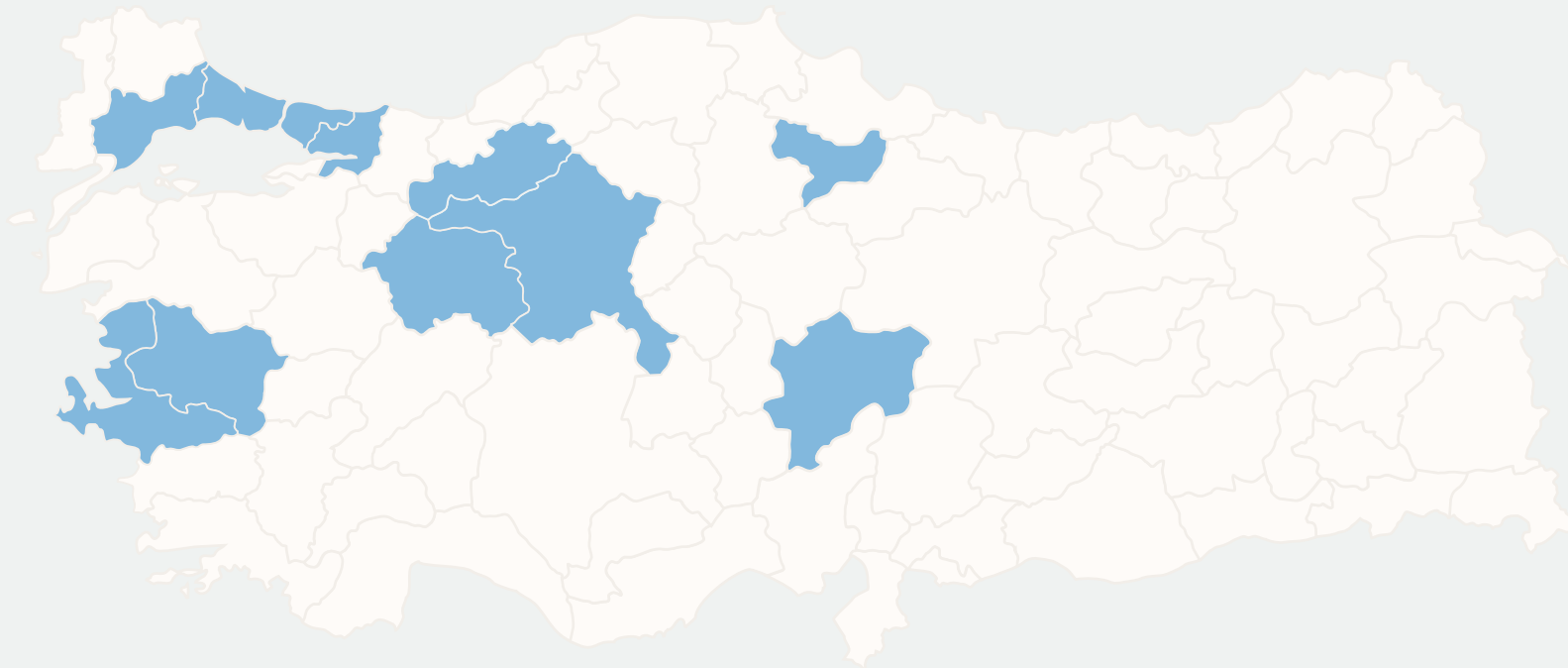
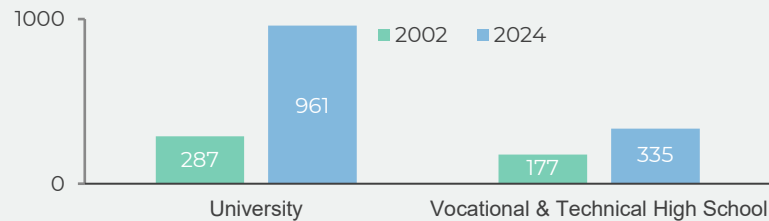
Availability of Qualified Engineers

(10=Available; 0=Unavailable), 2024



Annual Number off Graduates

(Thousands)



Household Appliances

Agenda



Why Türkiye?

White Goods

Small Home
Appliances

HVAC

Investment
Ecosystem

Small Home Appliances

In 2024, small home appliances sector in Türkiye grew by 6.3% on unit basis and by 57.3% on turnover basis.

In the Turkish market, **robot vacuum cleaners, air fryers, coffee machines and air purifiers/humidifiers** are among the top trending products.

57%

Growth in
Turnover



75%

Export Rate



Small Home Appliances

Demand driven by the demographic characteristics, as well as the strategic location's intersection with industrial capabilities.

E-commerce trends and **evolving daily habits** have boosted consumer interest in small home appliances.

57%

Growth in
Turnover



75%

Export Rate



20%

One Person
Householder



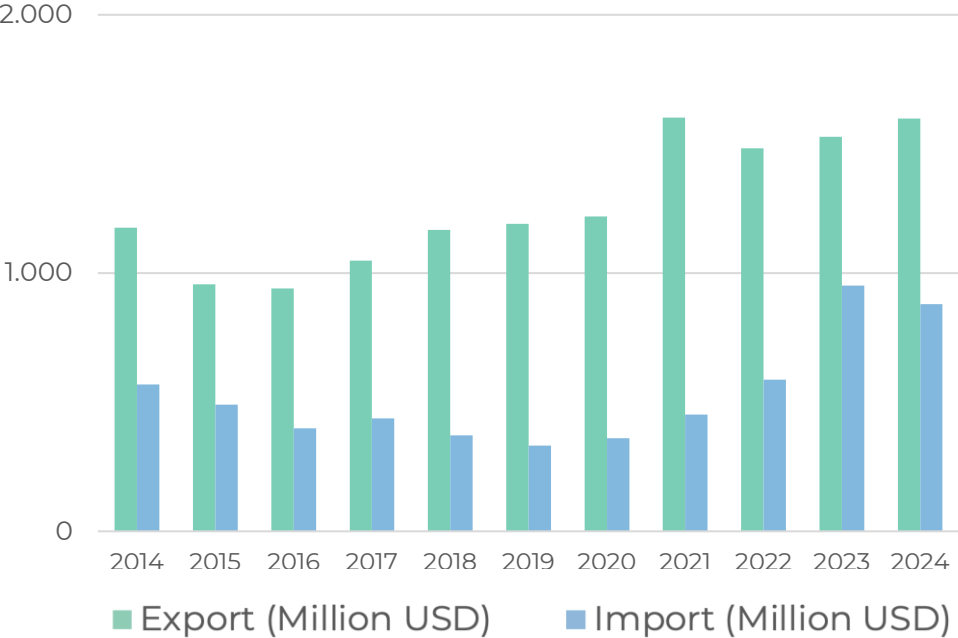
37%

Female Labor
Force Rate



Small Home Appliances

Demand driven by the demographic characteristics, as well as the **strategic location's** intersection with **industrial capabilities**.



Source: Comtrade, Trade Map



Household Appliances

Agenda



Why Türkiye?

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HVAC

+55.000 Employment in more than 130 firms

Robust domestic market and enlarging export markets creates increase in the sector

Strong demand driven by construction in residential market

1,4%

Global Market Share



80%

Export-Import Ratio



60%

Localisation Rate



20%

AC Ownership



HVAC

Robust domestic market and enlarging export markets creates increase in the sector

1,4%

Global Market Share



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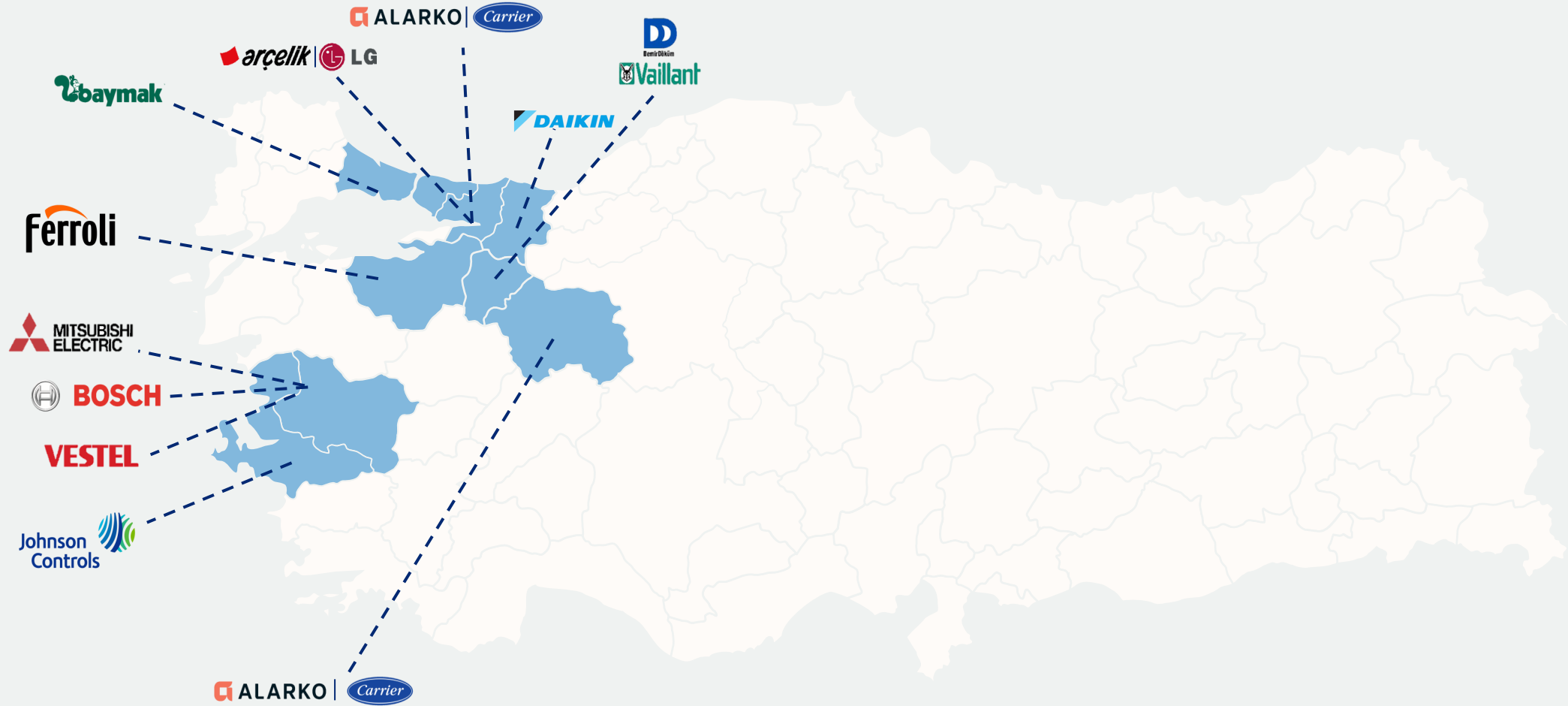


3,2%

Share in Türkiye's Exports



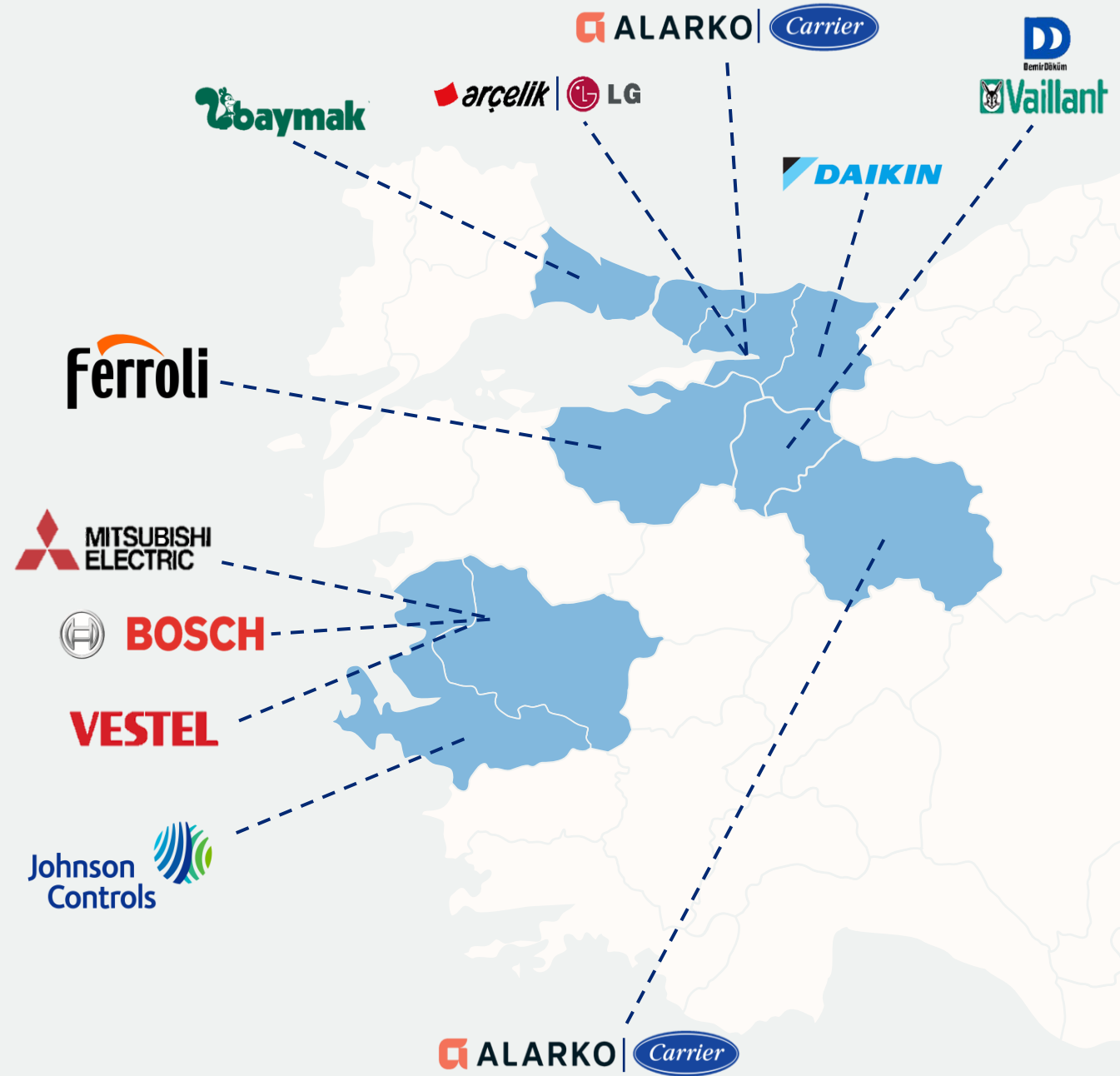
HVAC Manufacturers



HVAC

The world's largest players and local partners

Manufacturing capabilities, combined with global know-how, enable access to large international markets and resilient Turkish market.



HVAC

Major HVAC manufacturers in Türkiye



Product(s):
Air Conditioner



Product(s): Air
Conditioner,
Combi Boiler



Product(s): Air
Conditioner



Product(s): Air
Conditioner



Product(s): Air
Conditioner



Product(s):
Air
Conditioner,
Combi Boiler



Product(s):
Combi Boiler



Product(s):
Combi Boiler



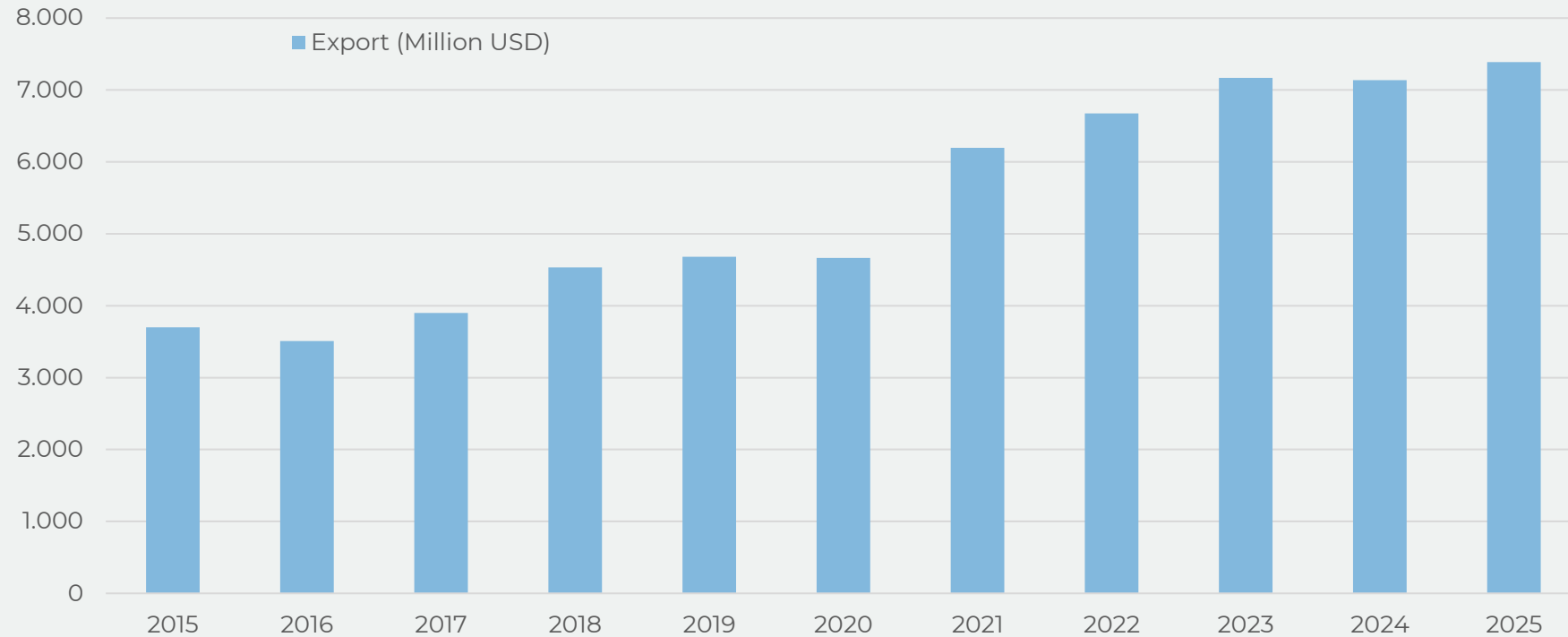
Product(s):
Air
Conditioner,
Combi Boiler



Product(s):
Air Conditioner

HVAC

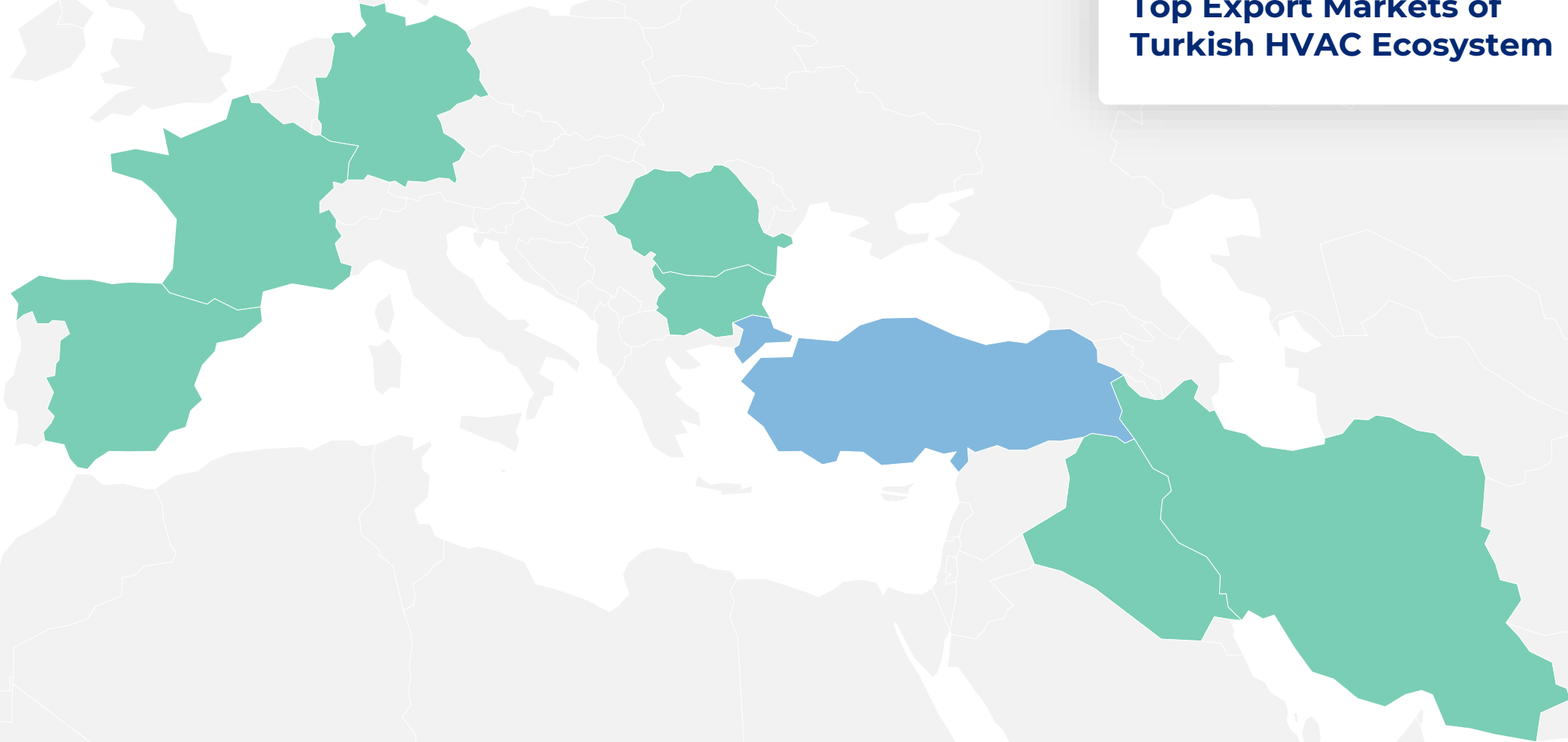
Key supplier to expanding HVAC market, powered by its position as the Nexus of the World



Source: Official Press Releases, TIM, Ministry of Trade

HVAC

**Top Export Markets of
Turkish HVAC Ecosystem**



Source: Trademap, Official Press Releases, TİM, Ministry of Trade

Household Appliances

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White Goods

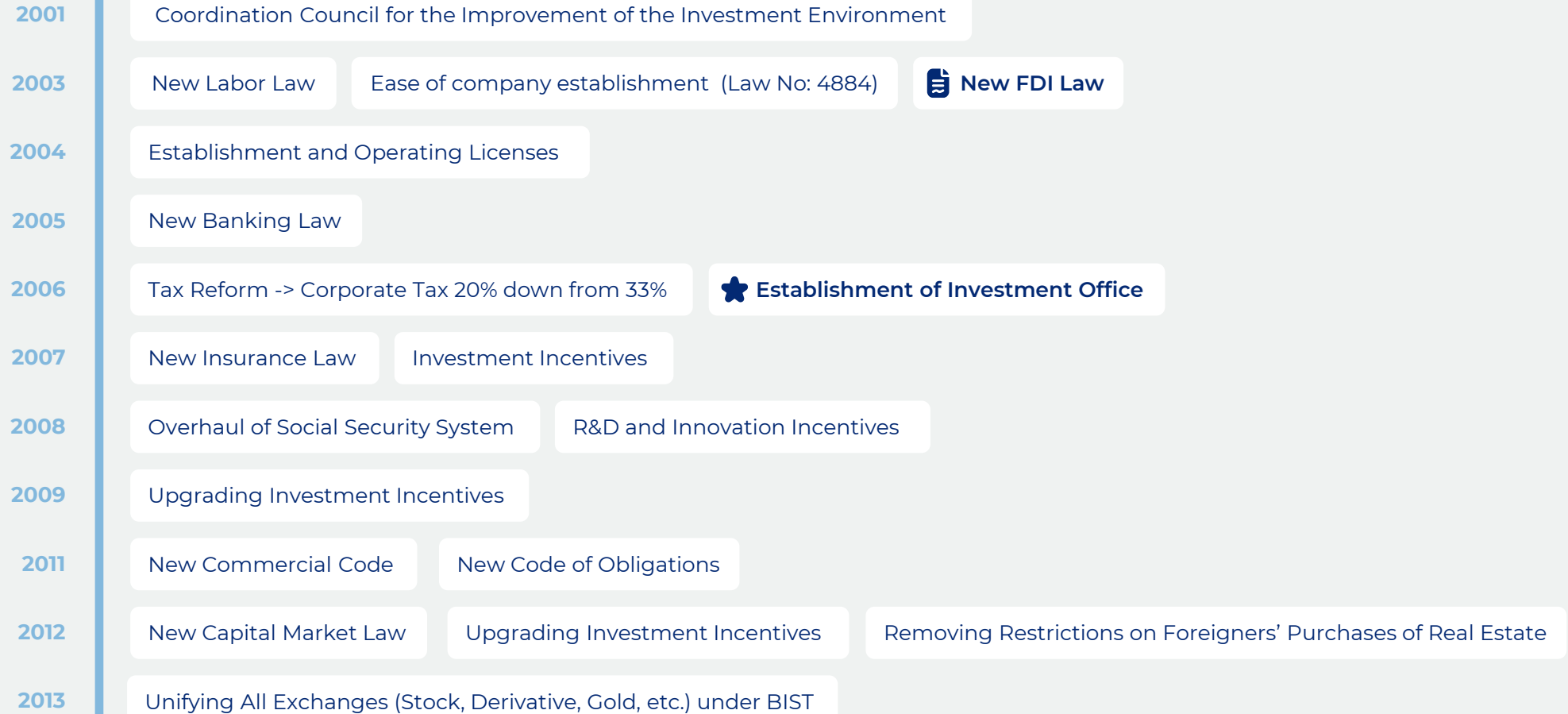
Small Home
Appliances

HVAC

Investment
Ecosystem

Major reforms every 18-24 months

Continuous Reform Process



2014

Istanbul Arbitration Center

2016

Upgrading Investment Incentives.



Personal Data Protection Law

2017

Industrial Property Law (IPR)

Production Reform Package

New Labor Courts Code

2018

Amendments to improve doing business (Law 7099)

2019

Tech-Driven Industry Initiative

Ease of Doing Business Reform Package I

2020

Ease of Doing Business Reform Package II

Amendments to the Capital Market Law (Introduction of Global Standards)

2021

Paris Agreement



Establishment of European Green Deal Working Group

Green Deal Action Plan



FDI Strategy

2022

The law on the regulation of electronic commerce

Istanbul Financial Centre Law

2023

12th Development Plan

Introduction of ALAIC (Advance Loans Against Investment Commitment)

2024



High Tech Investment Program HIT-30

Amendments to Personal Data Law

Coastal Law Changes Enabling Solar Power (SPP) on Lakes

2025



New Investment Incentive System

2030 Industry and Technology Strategy

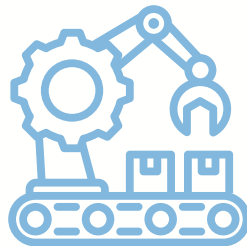
Continuously implementing sweeping reforms in many areas

Lucrative Incentives

Offering lucrative incentives in many ways

Manufacturing Incentives

- VAT Exemption
- Customs Duty Exemption
- Tax Reduction
- Social Security Premium Support
- Interest or Profit Share Support
- Machine Support
- Land allocation



R&D and Innovation Incentives

- Corporate Tax Exemption
- Social Security Premium Support
- Customs Duty Exemption
- Fundamental Sciences Employment Support
- VAT Exemption





PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE

**INVESTMENT &
FINANCE OFFICE**



nexus
OF THE WORLD