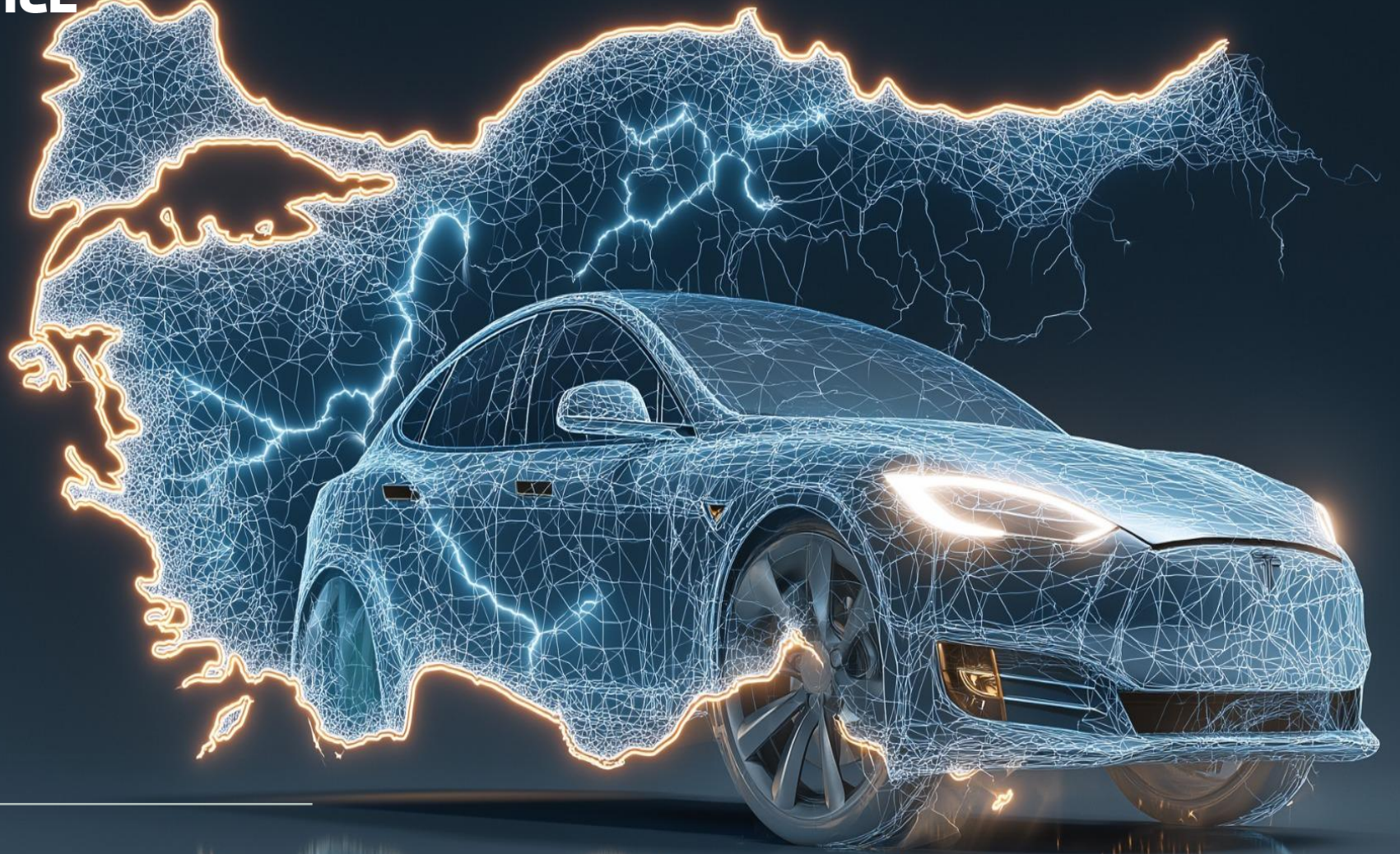




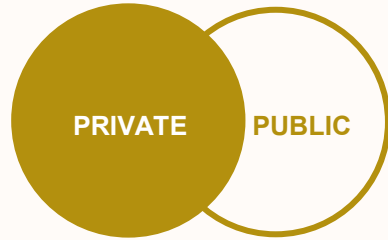
PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT &
FINANCE OFFICE**

Electric Vehicle Market Türkiye



INVEST IN TÜRKİYE

ASSIST YOU BEFORE, DURING AND
AFTER YOUR ENTRY INTO TÜRKİYE



**PRIVATE SECTOR APPROACH
WITH PUBLIC SECTOR CAPABILITIES**



**A GOVERNMENTAL AGENCY
REPORTING TO THE PRESIDENT**



**ACTING AS A
SOLUTION PARTNER**



**CUSTOMIZED
CONSULTING**



**BUSINESS
FACILITATION**



**TAILOR-MADE
DELEGATION
VISITS**



**PARTNERSHIP
DEVELOPMENT
ASSISTANCE**



**COORDINATION WITH
STAKEHOLDERS**



**SITE SELECTION
SUPPORT**



PROJECT LAUNCH



ONGOING SUPPORT

AGENDA

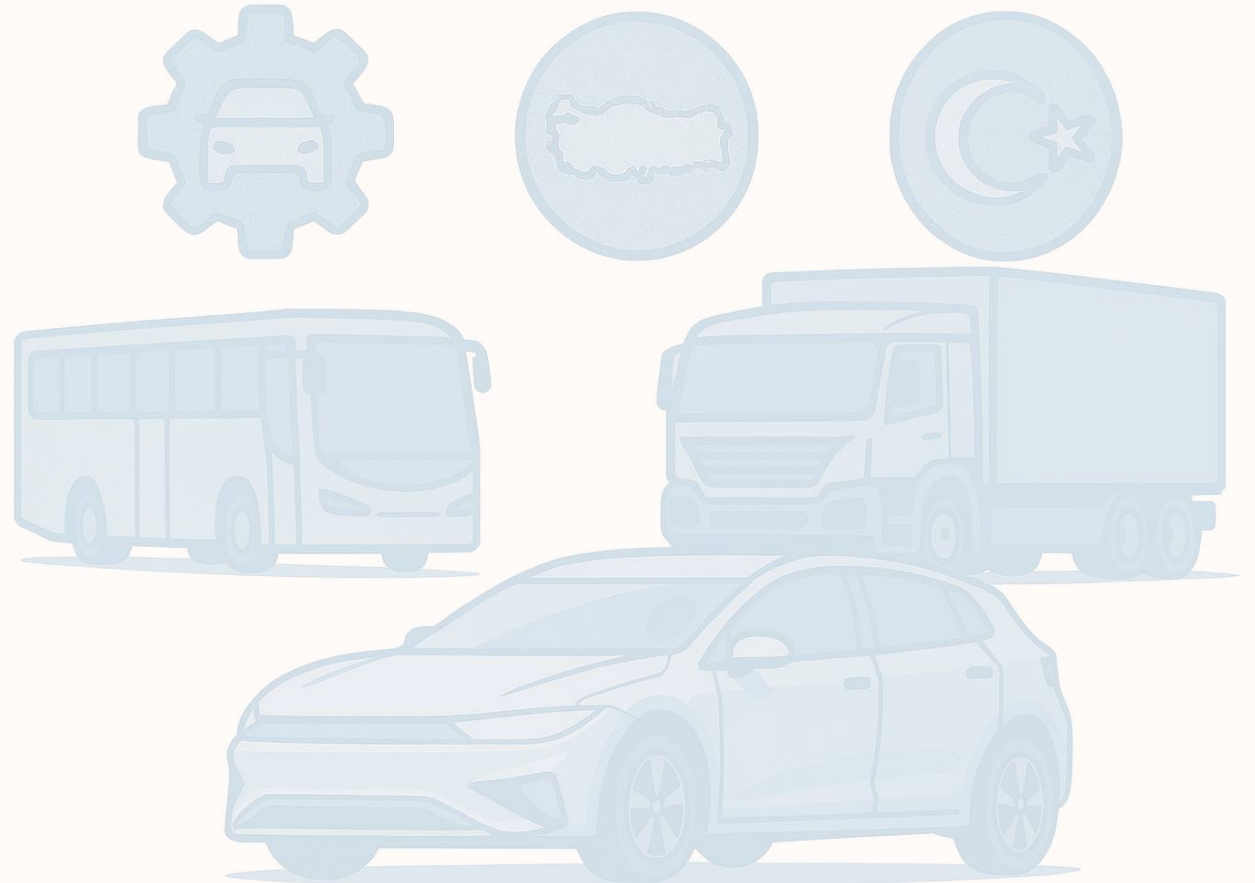


1 - AUTOMOTIVE INDUSTRY IN TÜRKİYE

2 - TÜRKİYE'S EV PRODUCTION CAPACITY

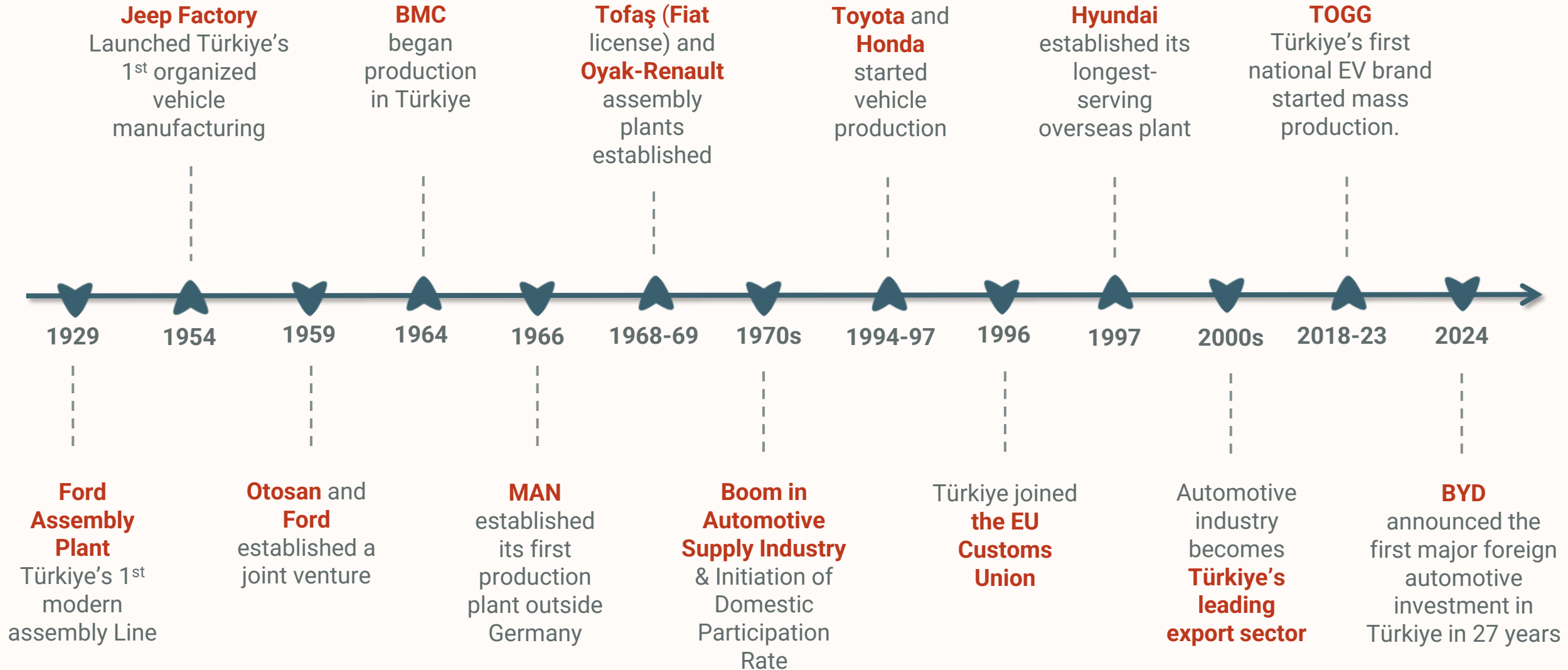
3 - EV MARKET & INFRASTRUCTURE

4 - REGULATIONS AND SUPPORTS

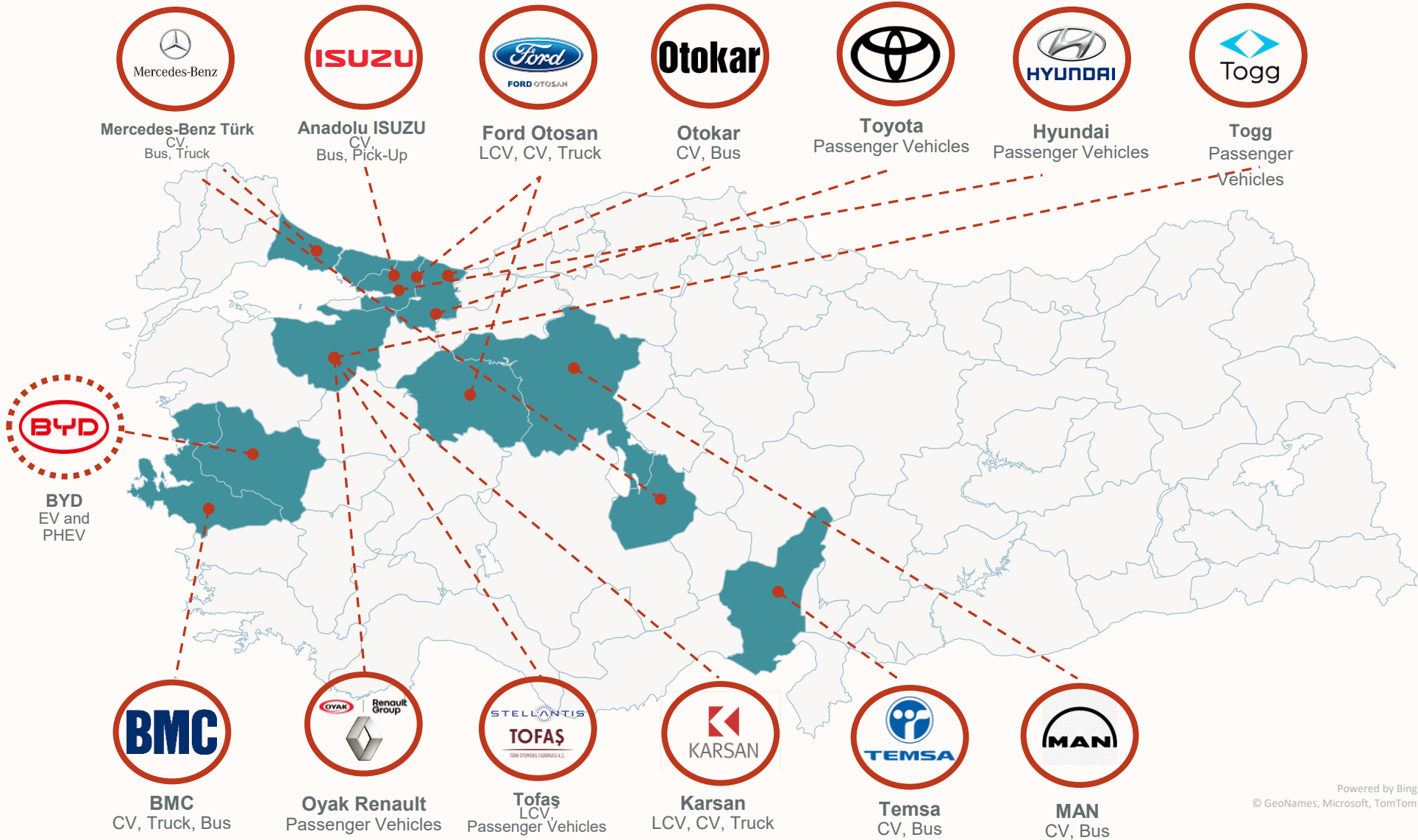




HISTORICAL MILESTONES



OEMs in Türkiye




8 of 13 OEMs are
multinationals


1.36 million
vehicles were
produced in 2024


906k passenger
vehicles **460k**
commercial
vehicles


1.02 million
vehicles were
exported in 2024

Powered by Bing
© GeoNames, Microsoft, TomTom



Essentials



30+ out of 100
biggest global
suppliers
producing in
Türkiye



12th largest
automotive
producer
globally



4th largest
automotive
producer in
Europe

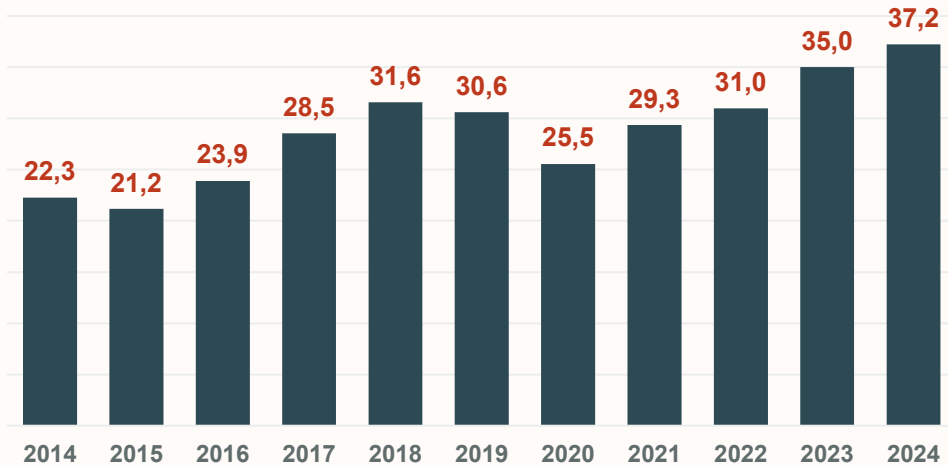


2nd largest LCV
producer in
Europe

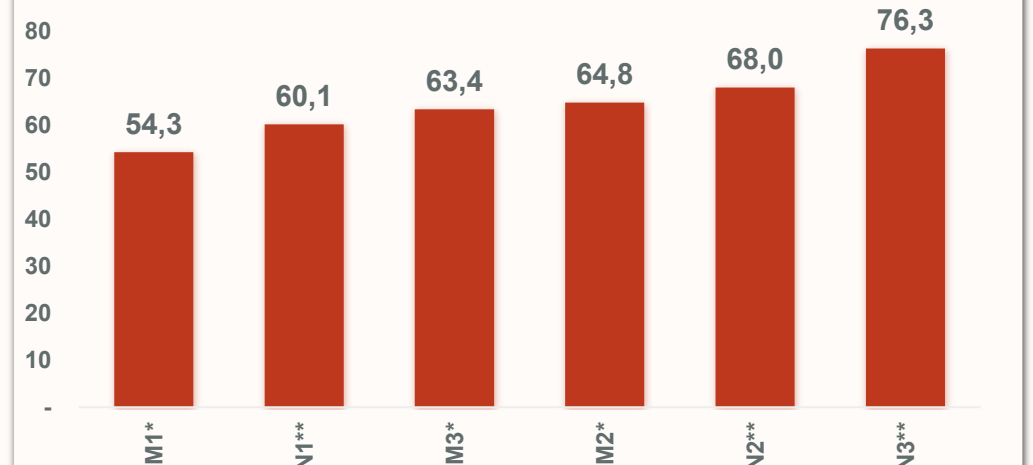


167
R&D and design
centers in
automotive industry

Vehicle Exports
(Billion \$)



Localization Rates
(for Vehicle Categories, %)



AGENDA

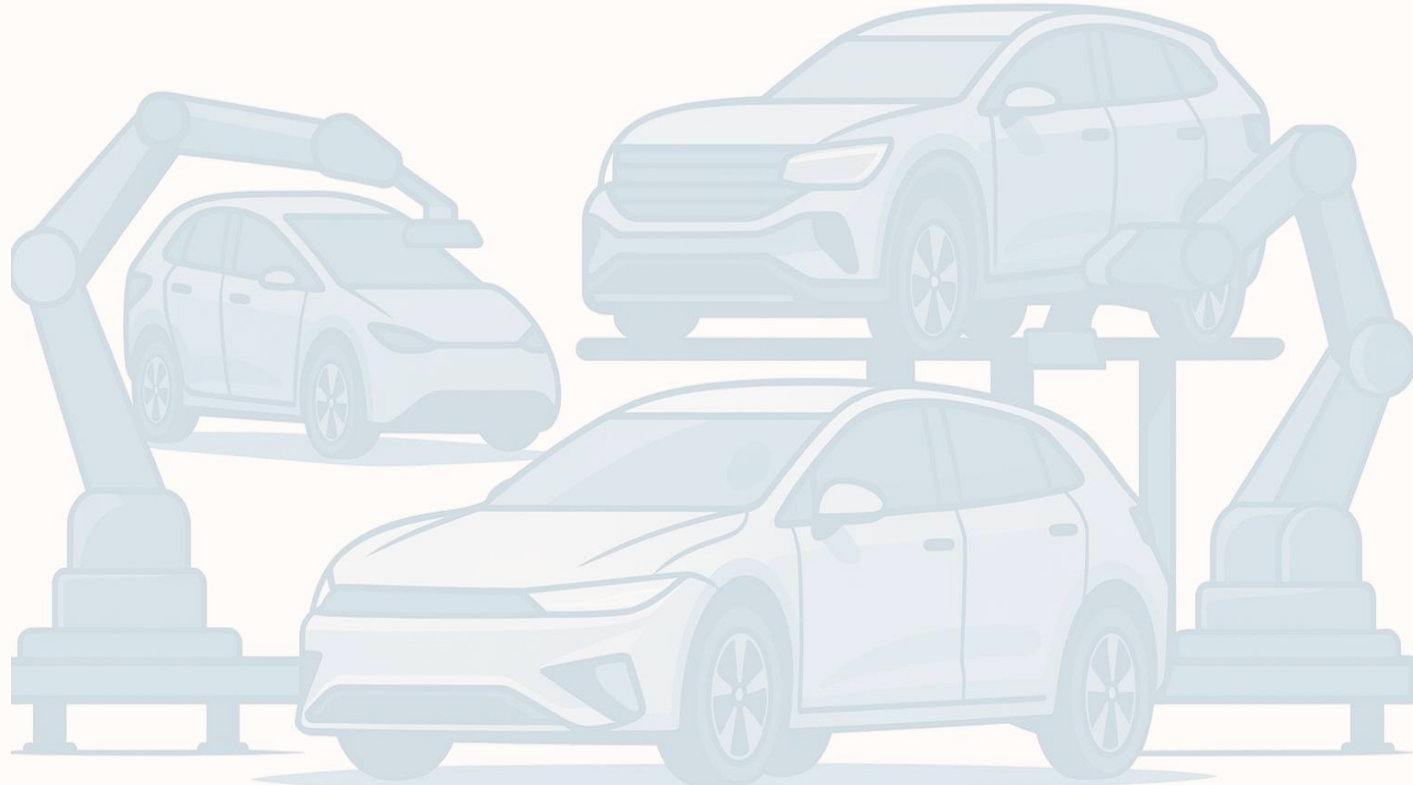


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Passenger Cars - Fully Electric: TOGG



Production in Türkiye (2024)

- ▶ **Established:** 2018
- ▶ **Total Production Capacity:** 175k/year
- ▶ **Total Investment:** \$2 billion
- ▶ **Sales** started in 2023 (T10X)
 - 2023:** 19,583 units
 - 2024:** 30,093 units
 - 2025 H1:** 17,101 units



T10X

- ✓ Türkiye's 1st indigenous all-electric SUV model
- ✓ 100% Electric, Zero Emission

2030
aims to produce/sell 1 mn
vehicles in 5 different
models



T10F

- ✓ Türkiye's 1st indigenous all-electric Sedan model
- ✓ Pre-orders were opened in September 2025.
- ✓ 100% Electric, Zero Emission

Global Expansion

- ▶ Plans to start **exports** in 2025 to Europe
- ▶ Its **first international launch** at the IAA Mobility 2025 fair in Munich
- ▶ Started taking orders from **Germany**

Production in Türkiye (2024)

- ▶ **Established:** 1994
- ▶ **Total Production Capacity:** 280k/year
- ▶ **Total Vehicle Production:** 225K+ in 2024
- ▶ **16%** of Türkiye's total vehicle production
- ▶ **Exported 187k+ units, 83% of production**
- ▶ **Electrification Investment:** 2023
- ▶ **Total Amount:** €308 million



Toyota C-HR PHEV

✓ 1st PHEV vehicle produced in Türkiye

Electrification Investment

- ▶ 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**



Corolla Sedan

✓ Full hybrid motor option



Renault
Group



Production in Türkiye (2024)

- ▶ **Established:** 1969
- ▶ **Total Production Capacity:** 390k/year
- ▶ **Total Vehicle Production:** 332k+ in 2024
- ▶ **Exported 73% of production 40+ countries**
- ▶ **Electrification Investment:** 2023
- ▶ **Total Amount:** \$400 million
- ▶ **Next-generation hybrid engine production** started in 2025
- ▶ **Türkiye's largest passenger car producer and exporter**



Renault Clio V Hybrid (E-Tech)

- ✓ Full hybrid motor option
- ✓ Euro 6 emission standard



Renault Duster

- ✓ Full hybrid motor option
- ✓ Euro 6 emission standard



Renault Boreal

- ✓ E-Tech Hybrid motor option
- ✓ To be launched in 2026
- ✓ Will be exported 50+ countries

Renaulution Investment in Türkiye

- ▶ 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
- ▶ **Sales** started in 2024 (Duster)



Passenger Cars - New Investments



- ✓ 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** after Togg, and the **1st among global brands**
- ✓ Model will be produced: **IONIQ 3**



- ✓ **New OEM Investment**
- ✓ **Total Investment Amount: \$1 billion**
- ✓ **Production: EV-PHEV**
- ✓ **Production Capacity: 150k/ year**

Production in Türkiye (2024)

- ▶ **Established:** 1959
- ▶ **Total Production Capacity:** 634.5k/year
- ▶ **Total Vehicle Production:** 382k+ in 2024
28% of Türkiye's **total vehicle production**
83% of Türkiye's **commercial vehicle production**
- ▶ **Exported 330k units in 2024**

- ▶ **Electrification Investment:** 2021
- ▶ **Total Amount:** ~\$3 billion
- ▶ **EV Production (2024):**
E-Transit: 8,371
E-Transit Custom: 26,125

E-Transit

- ▶ Türkiye's **1st mass-produced** electric commercial vehicle
- ▶ Ford's **1st fully electric** Transit model globally
- ▶ Earned recognition with a **Euro NCAP Gold Award** for its advanced driver assistance systems.
- ▶ **Sales** started in 2022



Ford E-Transit Cargo Van

- ✓ 100% Electric, Zero Emission



Ford E-Transit Custom Cargo Van

- ✓ 100% Electric and PHEV versions



Ford E-Transit Chassis Cab

- ✓ 100% Electric, Zero Emission



F-LINE E-Truck

- ✓ The first 100% electric heavy commercial vehicle developed and produced in Türkiye
- ✓ Launched at the IAA 2025



Production in Türkiye (2024)

- ▶ **Established:** 1965
- ▶ **Total Production Capacity:** 19k/year
- ▶ **Total Vehicle Production:** 5k+ in 2024
- ▶ **11% of Türkiye's heavy commercial vehicle production**
- ▶ **Exported 1k+** units in 2024
- ▶ **Exported 18%** of production to
- ▶ **40+** countries

Electrification Investment

- ▶ **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



Citivolt 12

✓ 100% Electric, Zero Emission



Novociti Volt

✓ 100% Electric, Zero Emission



Novo Volt

✓ 100% Electric, Zero Emission



BIG-e

✓ 100% Electric, Zero Emission

Production in Türkiye (2024)

- ▶ **Established:** 1966
- ▶ **Total Production Capacity:** 60k+/year
- ▶ **Total Vehicle Production:** 45k+ in 2024
- ▶ **EV exports to 20+ countries**
- ▶ **EV Sales (2024):** Electric bus & minibus: 547 units
- ▶ **2018–2024 cumulative** electric bus & minibus **exports:** 1,447 units
- ▶ **e-JEST** sales started in 2018, **e-ATAK** and **e-ATA** in 2021



e-JEST

✓ 100% Electric, Zero Emission



e-ATAK

✓ 100% Electric, Zero Emission



e-ATA

✓ 100% Electric, Zero Emission

EV Share

- ▶ 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.

Production in Türkiye (2024)

- ▶ **Established:** 1963
- ▶ **Total Production Capacity:** 7.5k/year
- ▶ **Total Vehicle Production:** 5k+ in 2024
- ▶ **61% export** of production **60+ countries**
- ▶ Also engaged in **defense industry manufacturing.**
- ▶ **1 out of every 3 buses** sold in Türkiye in **2024** was an Otokar.
- ▶ **4th largest bus manufacturer in Europe.**

Next-Gen Mobility

- ▶ 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



e-Centro

✓ 100% Electric, Zero Emission



e-Kent

✓ 100% Electric, Zero Emission



e-Kent Articulated

✓ 100% Electric, Zero Emission



e-Territo

✓ 100% Electric, Zero Emission

Production in Türkiye (2024)

- ▶ **Established:** 1987
- ▶ **Total Production Capacity:** 10.5k/year
- ▶ **Total Vehicle Production:** 3k+ in 2024
- ▶ **42% export** of production **70 countries**
- ▶ Produced Europe's **1st fully electric intercity bus.** (LD SB E)
- ▶ **MD9** sales started in 2016.
- ▶ The newly launched **Avenue Neo** carries **75 passengers** and offers up to **600 km range**



MD9 Electricity

✓ 100% Electric, Zero Emission



Avenue Electron

✓ 100% Electric, Zero Emission



LD SB E

✓ 100% Electric, Zero Emission

Electrification

- ▶ **Battery management systems** and **ECUs** are designed and developed in-house.
- ▶ R&D activities focus on **EVs**, **energy storage technologies**, and **autonomous vehicles**.



Battery Production



20 GWh / year

- ✓ Headquarter: Kocaeli/Türkiye
- ✓ Togg–Farasis Energy partnership
- ✓ Cell production by 2026
- ✓ 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

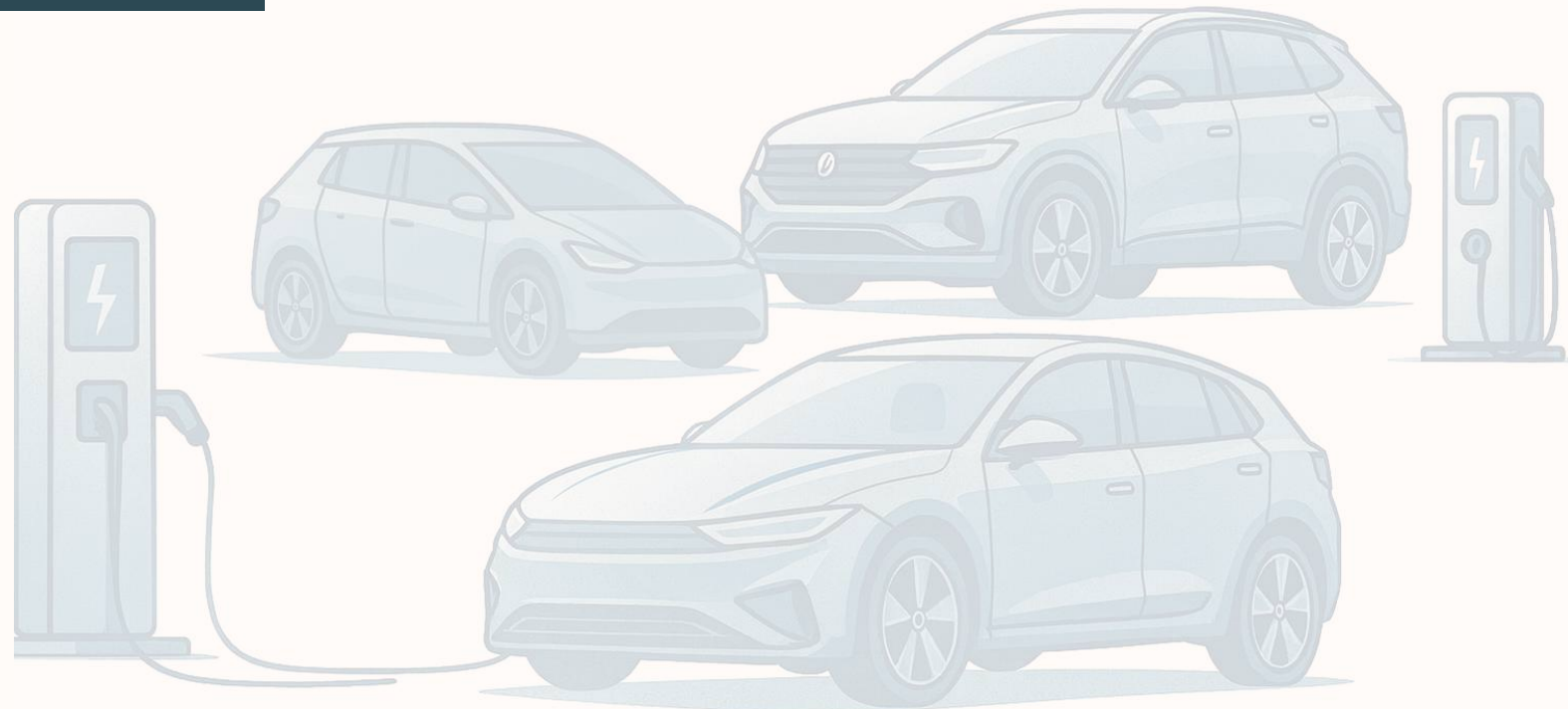
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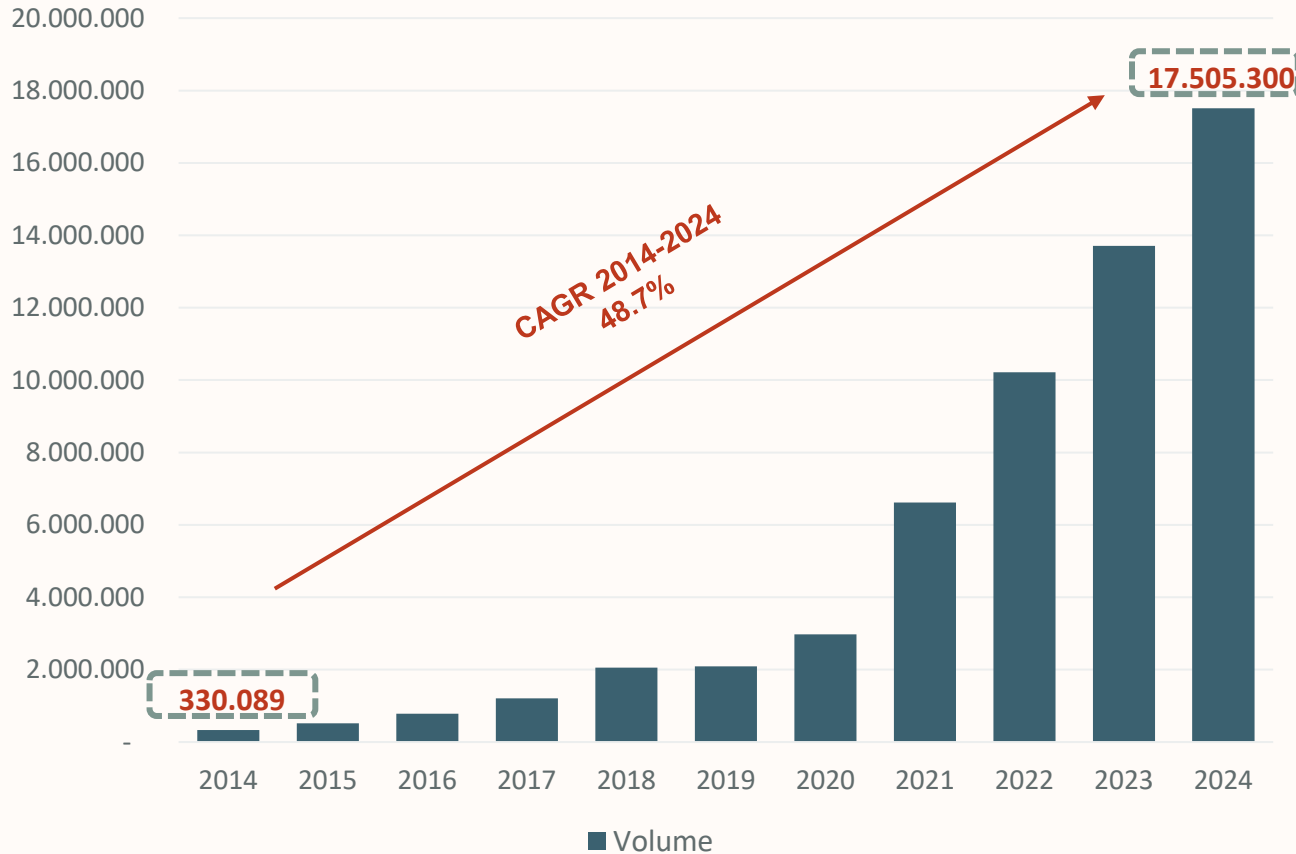
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EV Sales: Global

Global EV Sales
(Unit, 2014-2024)



Global EV sales reached at **17 million** units worldwide in **2024**



In 2025, global EV sales are expected to exceed **20 million** units, representing more than **25%** of all car sales



China is the largest market, with over **11 million EVs** sold in **2024**

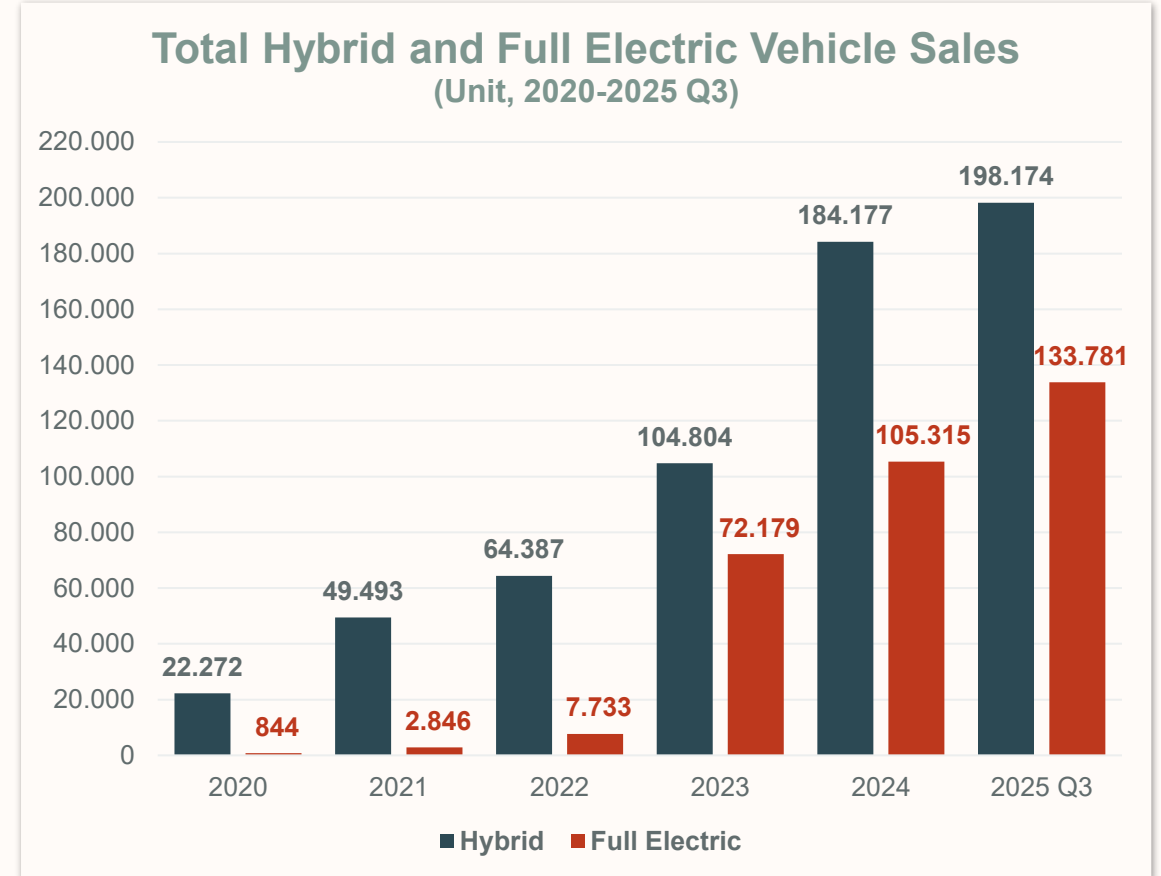
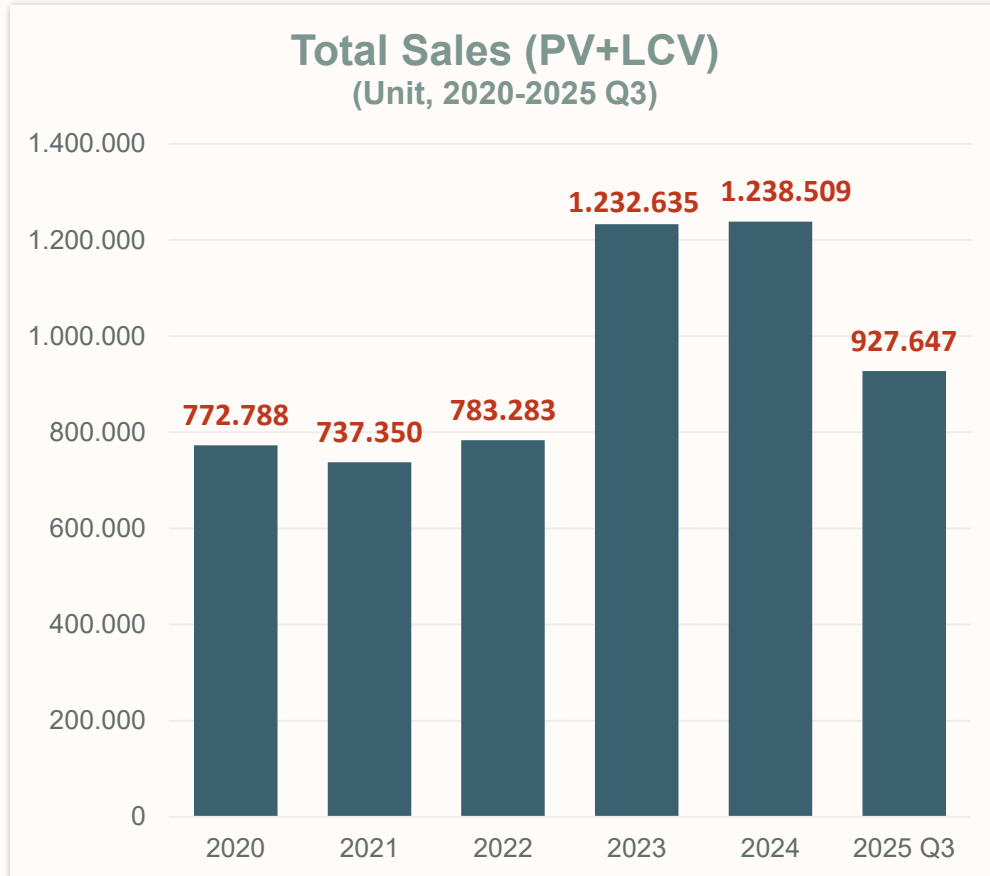


Türkiye ranks **16th** globally and **10th** in **Europe** by EV sales, with over 100,000 units sold in **2024**



EV Sales: Türkiye

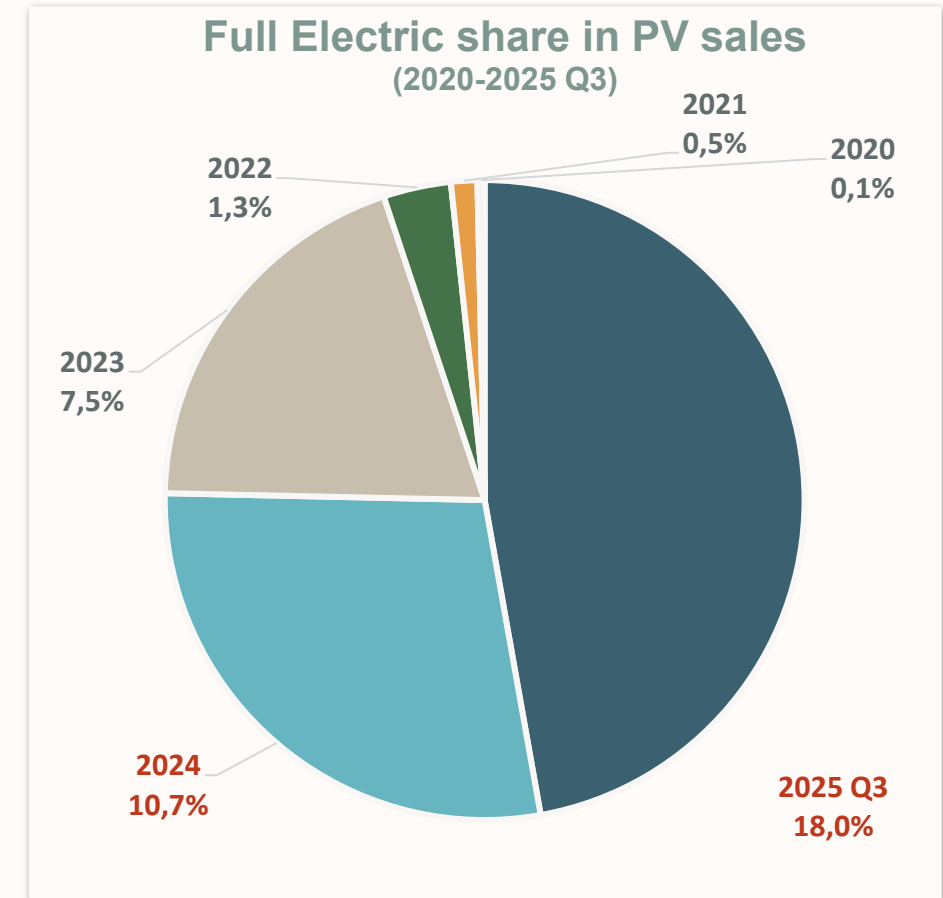
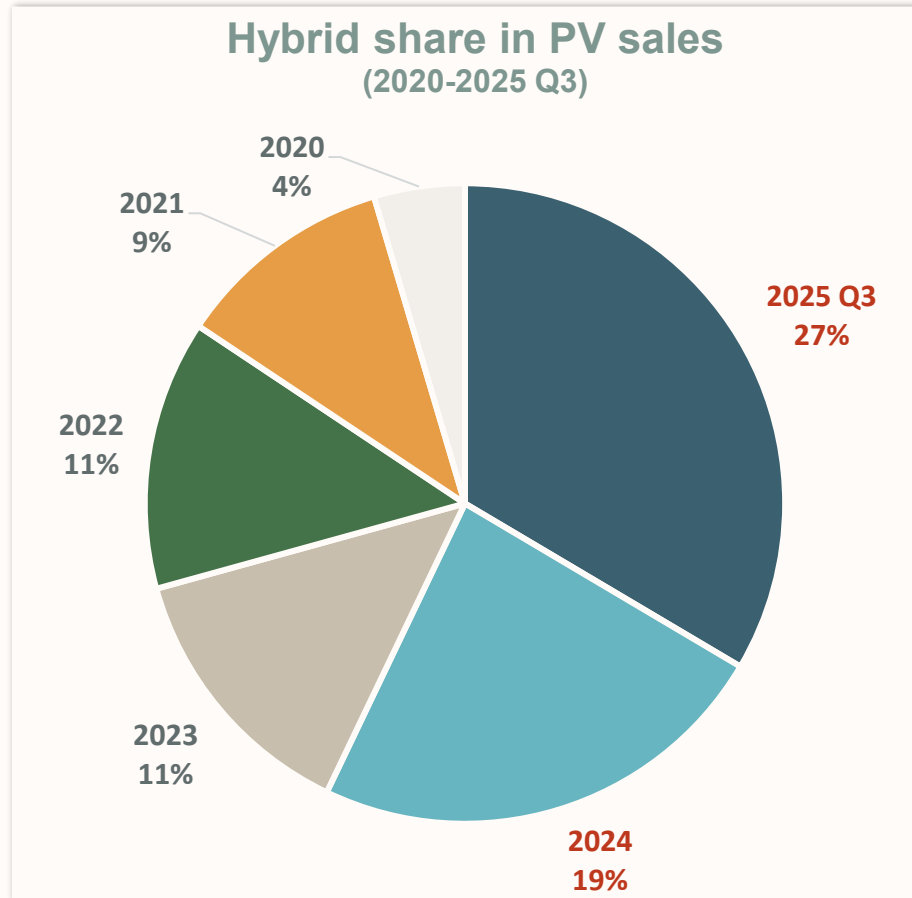
This page shows total vehicle sales volumes in Türkiye from 2020 to 2025 Q3. While overall market size remained relatively stable, the breakdown reveals a considerable expansion in electrified vehicle sales.





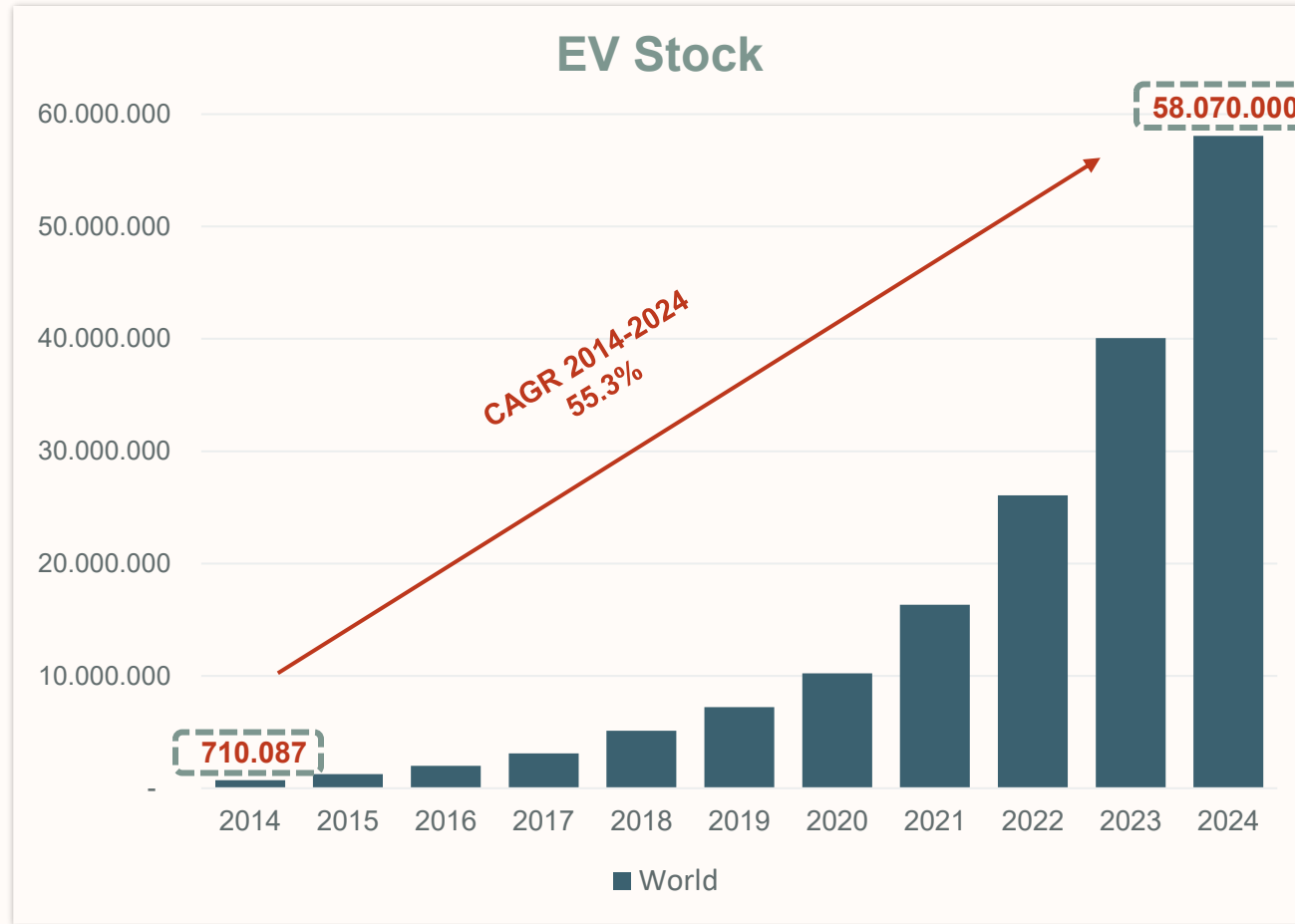
EV Sales: Türkiye

Both hybrid and full electric vehicles experienced remarkable growth in passenger vehicle sales in Türkiye since 2020. Together, they show that electrified vehicles now account for nearly 45% of all passenger vehicle sales.





EV Stock: Global



Between 2020 and 2024, global EV stock increased from 10.2 million to 58 million vehicles showing broader consumer acceptance.



China is on the top with 34 million EVs stock.

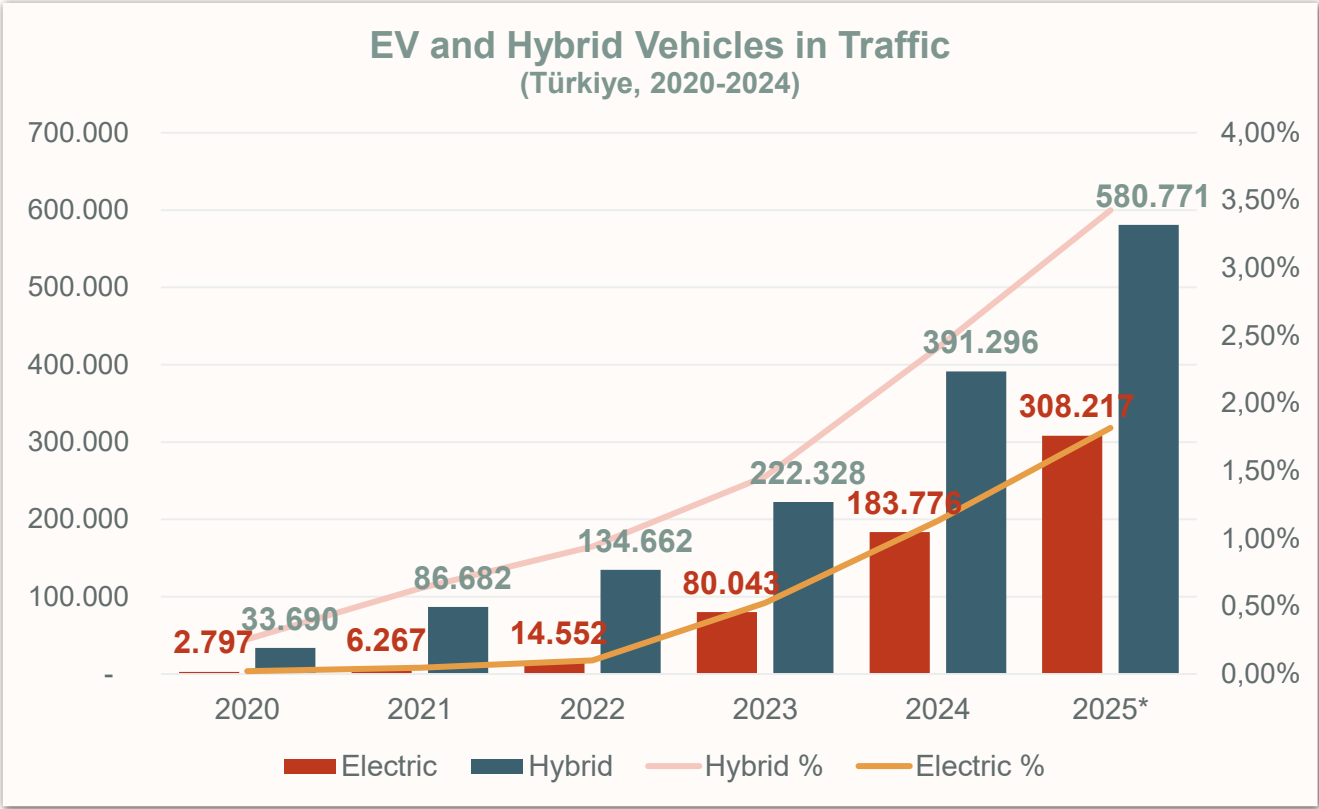
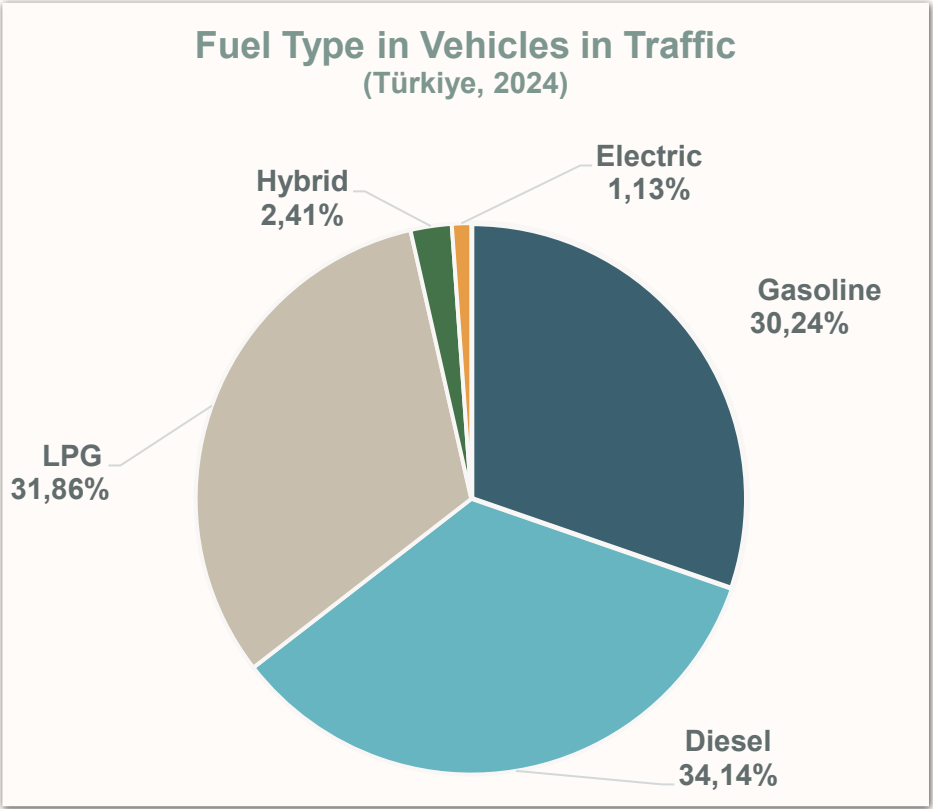


Electric vehicle adoption in Europe is also steadily rising

EV Stock: Türkiye



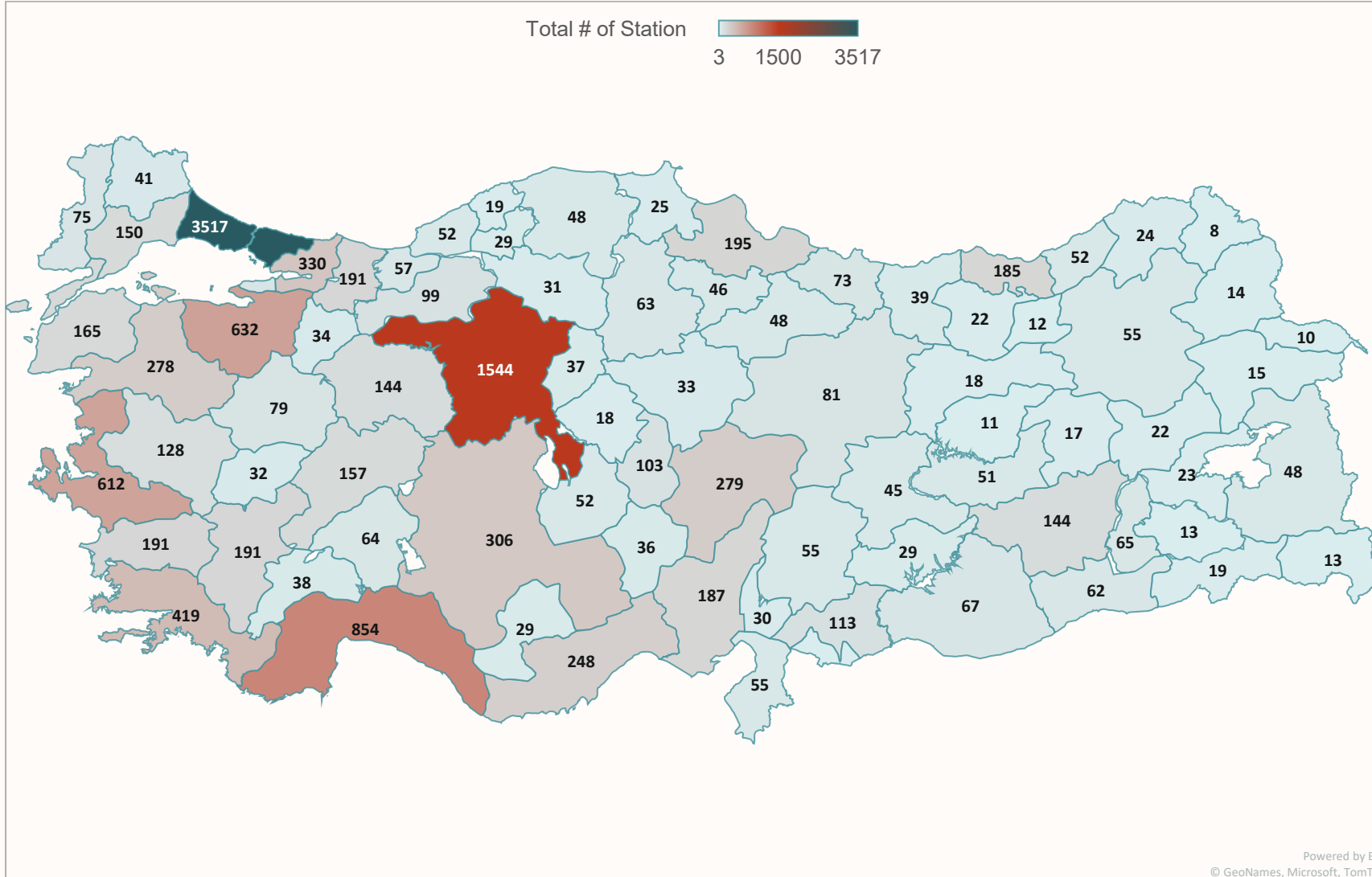
Conventional fuel types still dominate Türkiye’s vehicle stock, but the growing number and share of EVs and hybrids show a clear shift toward electrification.



*By the end of August 2025
Source: Turkish Statistical Institute



Charging Stations: Türkiye



Charging infrastructure is expanding in parallel with increasing EV adoption.



As of October 2025
176 companies operate
13,467 charging
stations across Türkiye

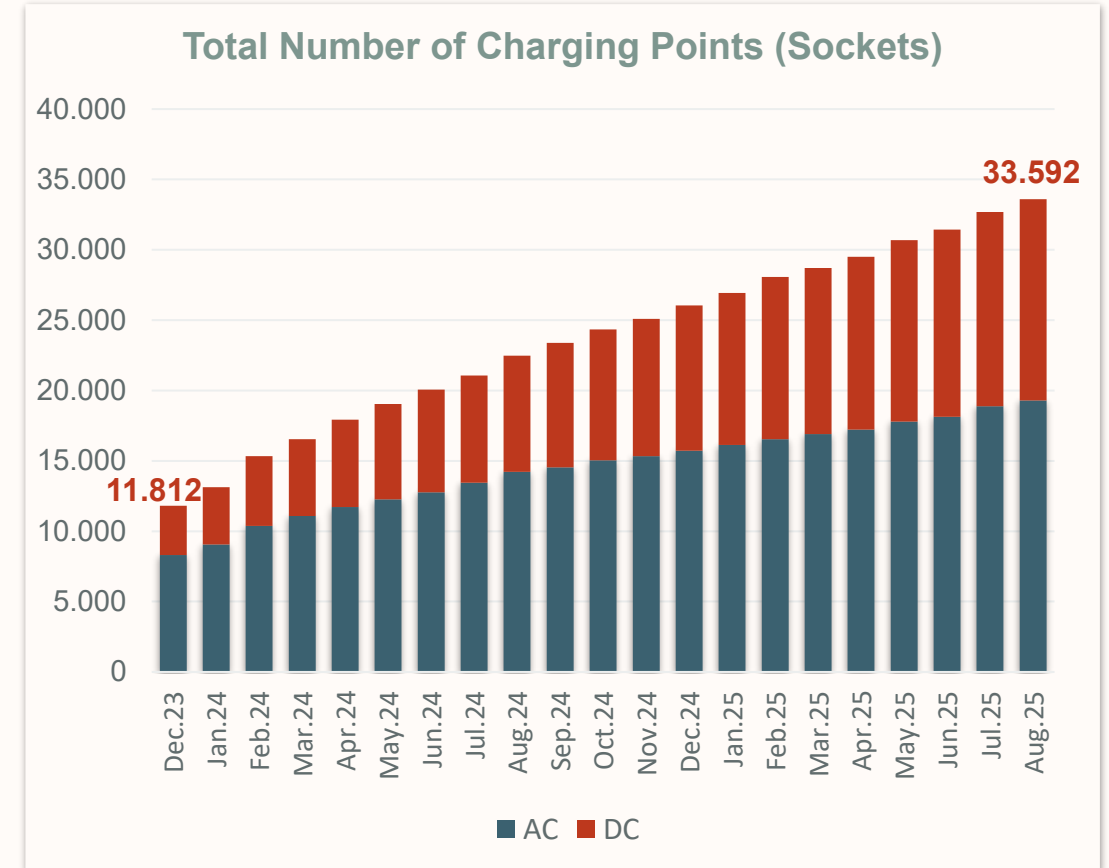
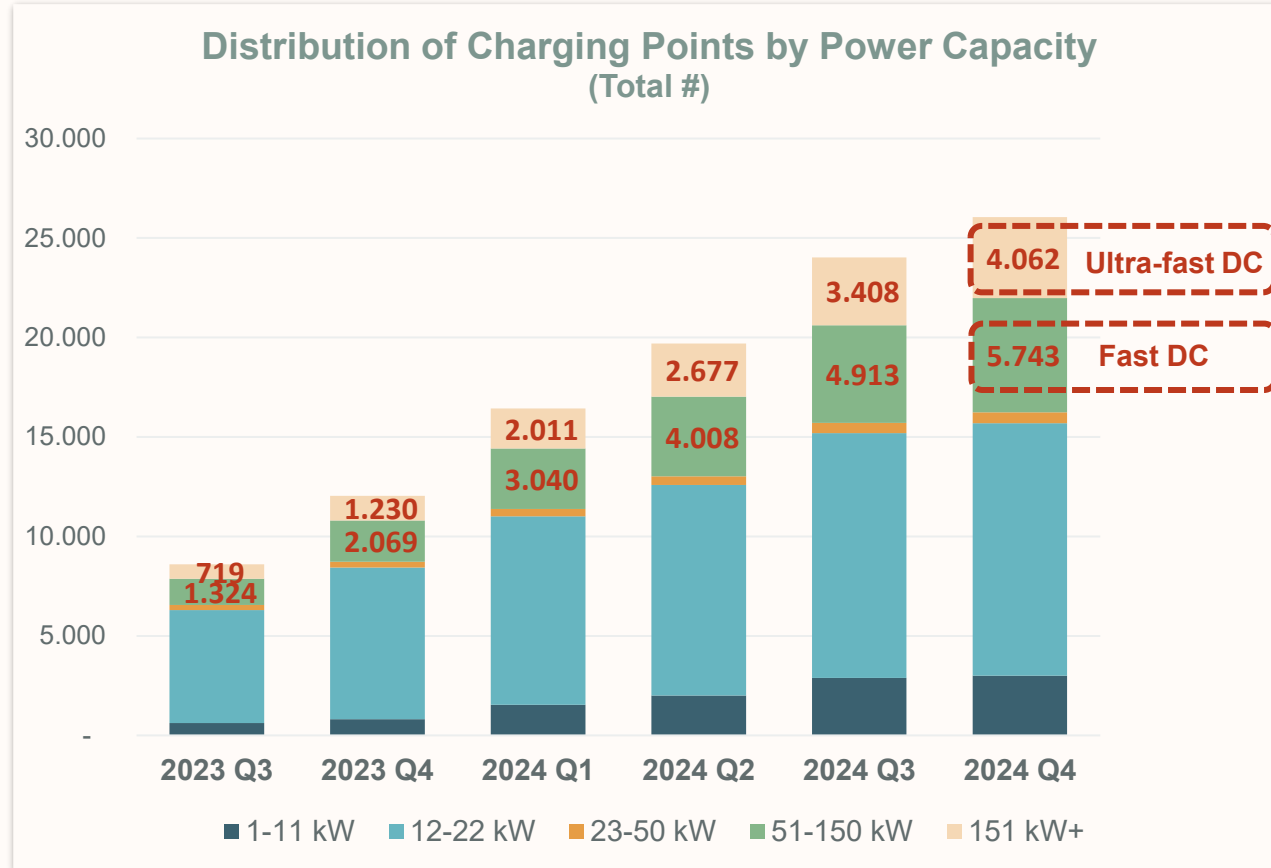


Station density is highest in major cities, yet **nationwide coverage** supports both daily use and intercity travel.



Charging Points: Türkiye

With over 33k sockets, Türkiye provides 1 charging point for every 9 EVs. The growing share of fast and ultra-fast DC infrastructure reduces range anxiety and signals market readiness for large-scale EV adoption.



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HIT–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



Domestic Production Supports

HIT-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

INVEST IN TÜRKİYE



/InvestTurkey

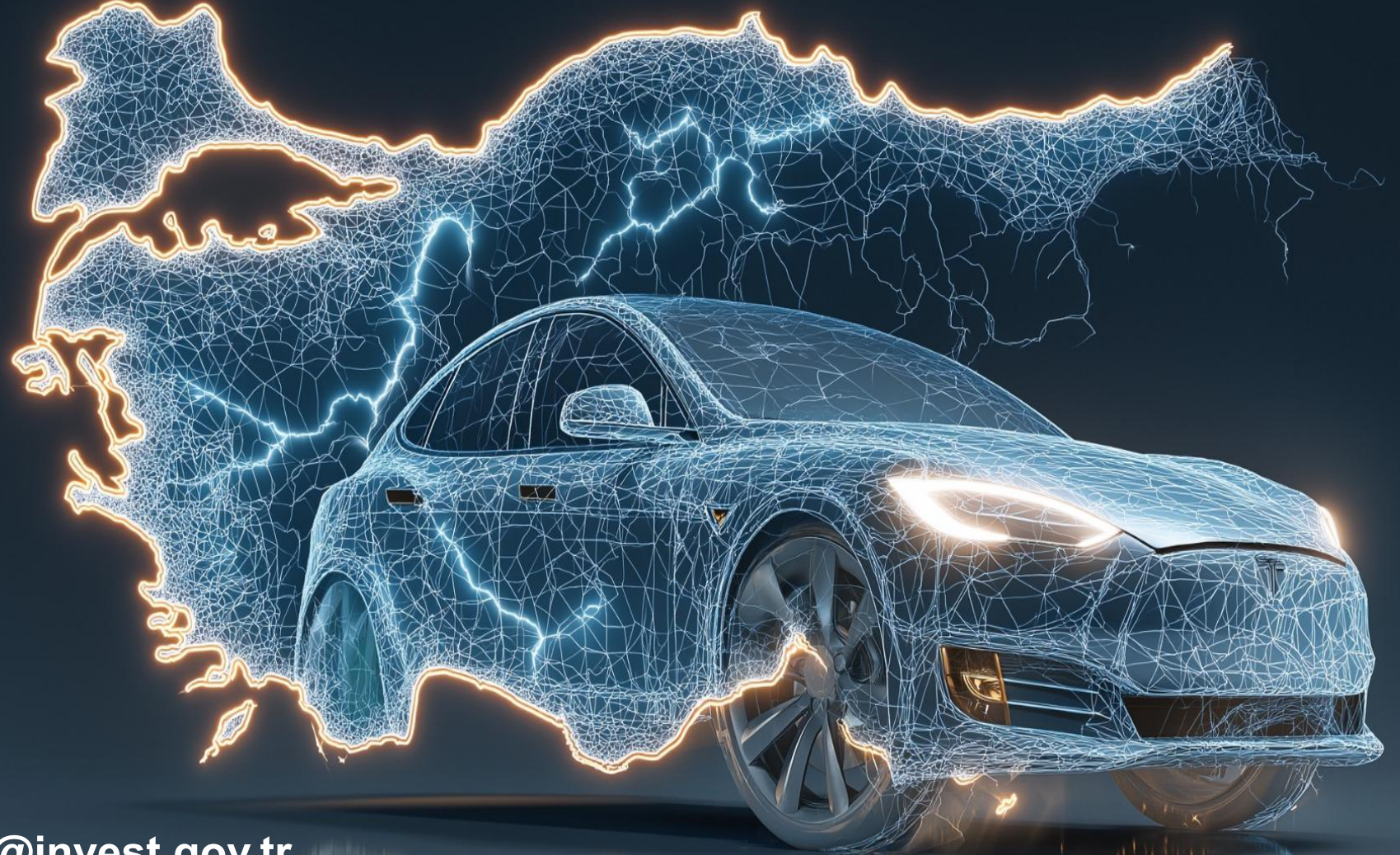


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