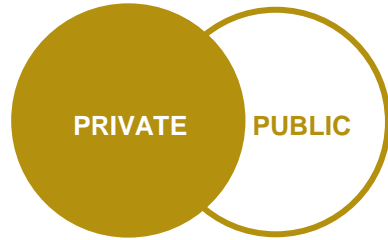




PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT &
FINANCE OFFICE**

MOBILITY
INDUSTRY
IN TÜRKİYE
2025





**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 - INVESTMENT ENVIRONMENT IN TURKİYE

2 - AUTOMOTIVE INDUSTRY IN TURKİYE

3 - E-MOBILITY ECOSYSTEM IN TURKİYE



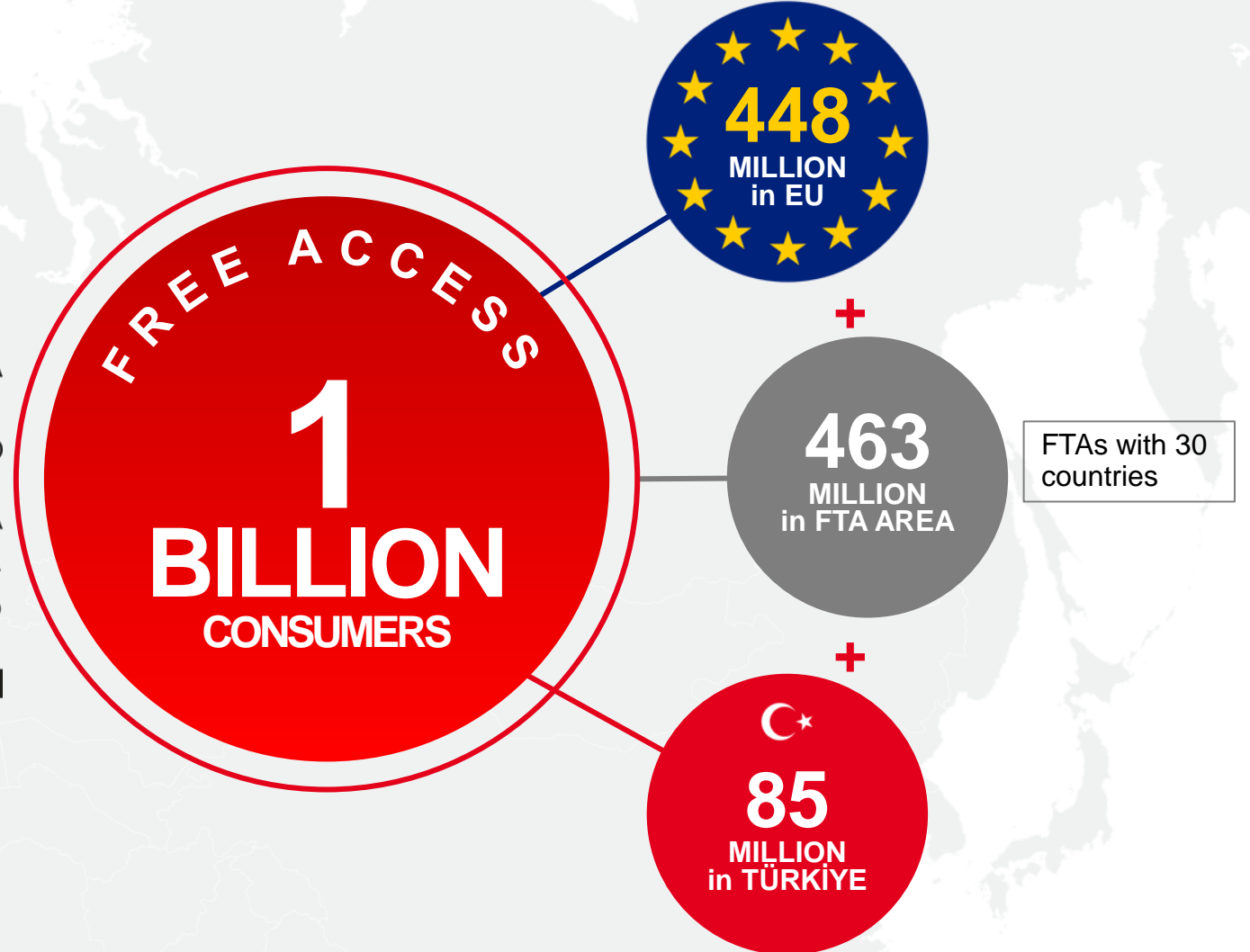
DOMESTIC + ACCESSIBLE MARKETS

DOMESTIC MARKET + EU MARKET + FREE TRADE AREA



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

NORWAY ISRAEL *SUDAN
LIECHTENSTEIN
SWITZERLAND ICELAND
BOSNIA AND HERZEGOVINA
PALESTINE MACEDONIA
MOROCCO TUNISIA
ALBANIA EGYPT
GEORGIA MONTENEGRO
SERBIA CHILE
MAURITIUS SOUTH KOREA
MALAYSIA *LEBANON MOLDOVA
FAROE ISLANDS
SINGAPORE VENEZUELA
UNITED KINGDOM
*QATAR KOSOVO



STRATEGIC LOCATION

HUB FOR MULTINATIONALS TO
MANUFACTURE, EXPORT AND
MANAGE



Working Hours
Intersect with
16 Time Zones

**PROXIMITY
TO MAJOR MARKETS**
1.3 billion people and
\$26T GDP in Europe,
MENA and Central Asia
at 4 hour flight-distance

CONNECTIVITY
Turkish Airlines connects
you to 340 destinations in
129 countries

**MANUFACTURING &
EXPORT HUB FOR
MULTINATIONALS**

**AS WELL AS
MANAGEMENT HUB FOR
MULTINATIONALS**

Cargill
66 countries

Microsoft
70 countries

Nestlé
Production base
for MENA

BOSS
HUGO BOSS
Its largest production
facility worldwide

B/S/H/
89 countries

GE Healthcare
22 countries

KNAUF
80 countries

TOYOTA
Exporting 85%
of its production

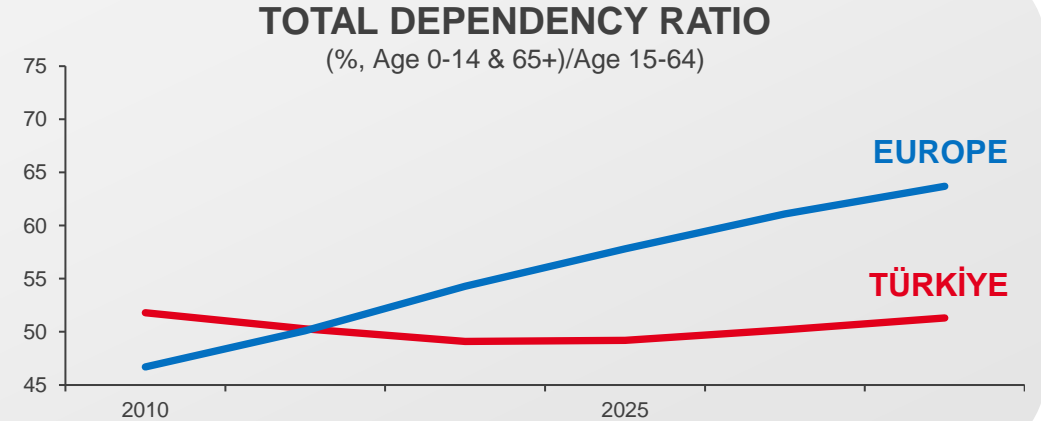
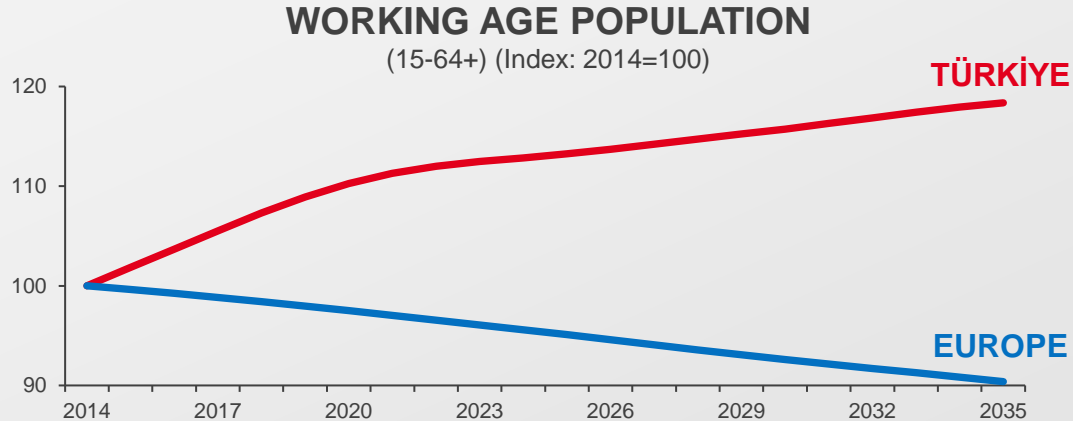
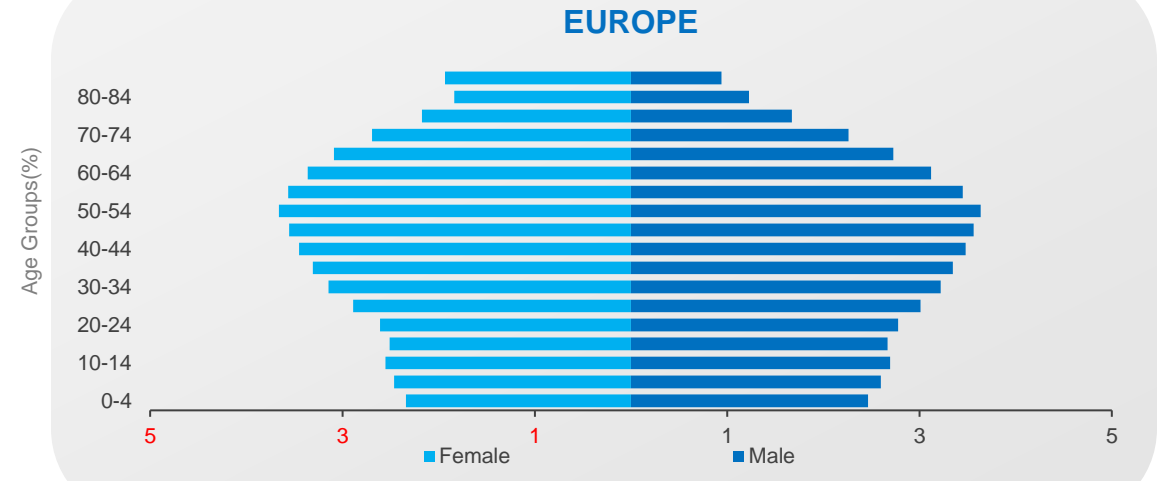
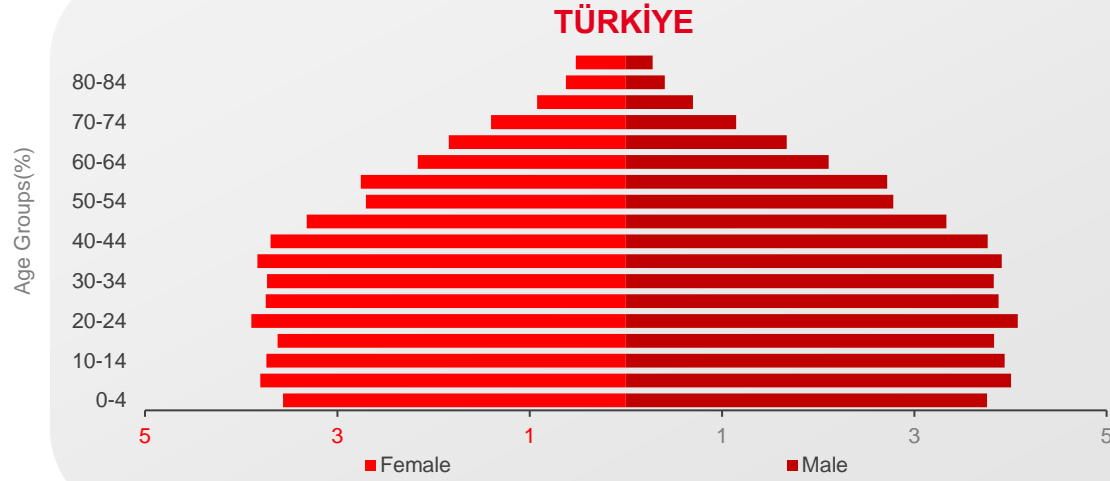
Ford
- Exporting 87%
of its production

SANOFI
14 countries

gsk
30 countries

FAVORABLE DEMOGRAPHICS

HALF OF POPULATION UNDER AGE OF 32.7
CREATING DYNAMIC LABOR FORCE AND FISCAL
DISCIPLINE

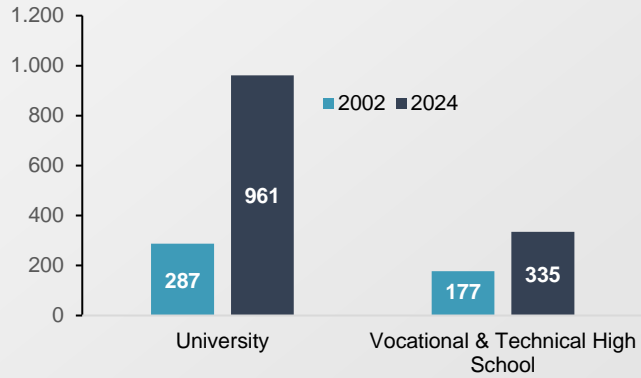


SKILLED AND COMPETITIVE LABOR FORCE

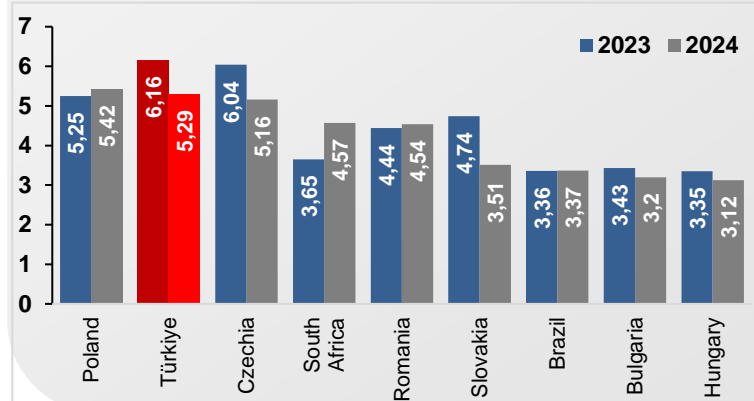
UPGRADED EDUCATION SYSTEM TO ENABLE A SKILLED LABOR POOL AND ADDRESS BUSINESS REQUIREMENTS



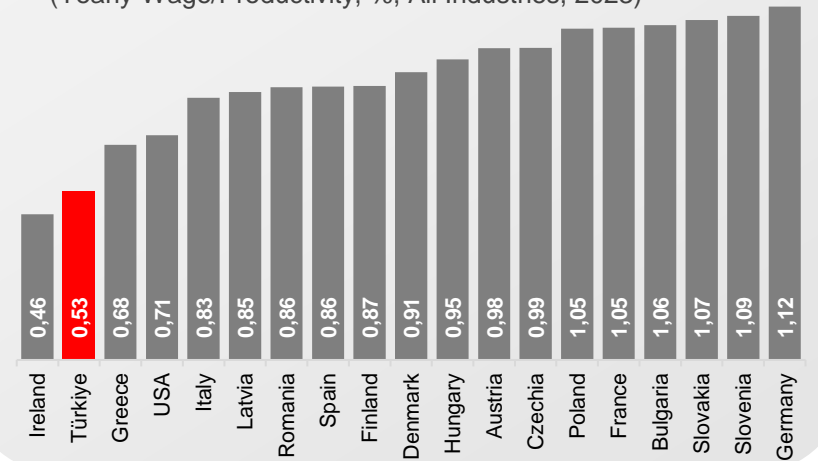
ANNUAL NUMBER OF GRADUATES
(thousands)



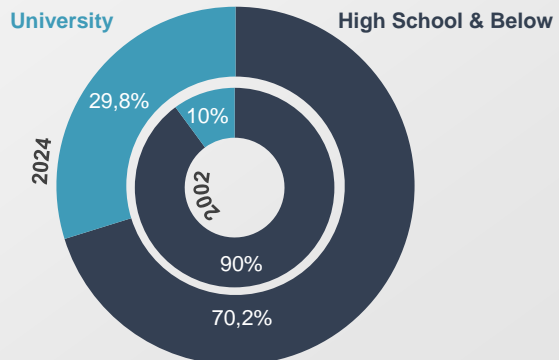
AVAILABILITY OF SKILLED LABOR FORCE,
(10=Available; 0=Unavailable)



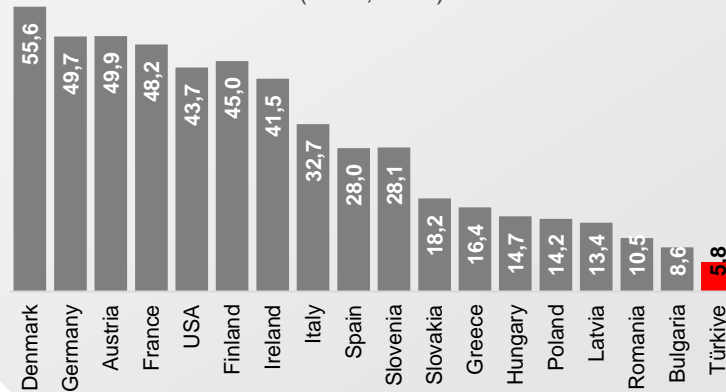
PRODUCTIVITY vs WAGES
(Yearly Wage/Productivity, %, All Industries, 2023)



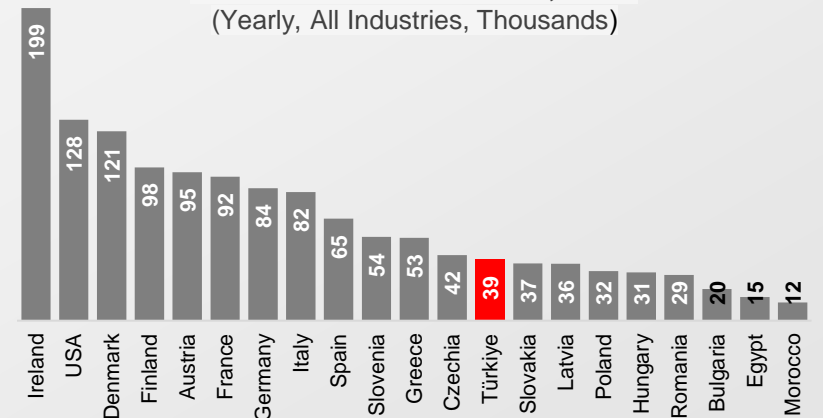
LABOR FORCE BY EDUCATION LEVEL



LABOR COST PER HOUR IN MANUFACTURING
(2023, USD)



LABOR PRODUCTIVITY, 2023
(Yearly, All Industries, Thousands)



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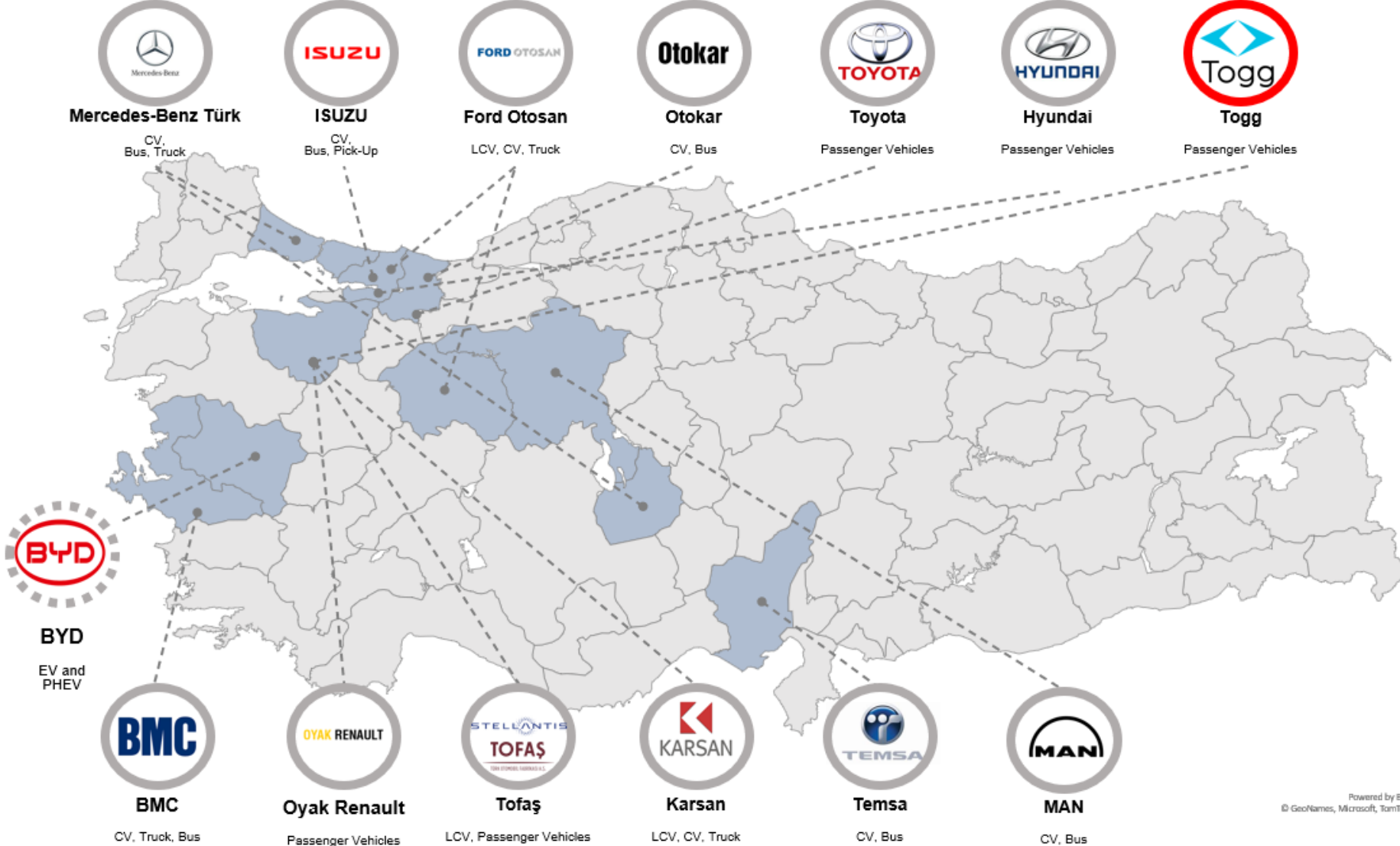
PRESENCE OF GLOBAL OEMs IN TURKIYE

13 OEMs. 8 of THEM ARE
MULTINATIONALS



of Global OEMs

	Türkiye	8
	Poland	5
	Czechia	4
	Hungary	4
	Slovakia	4
	Romania	2
	Serbia	1



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STRONG PRESENCE OF GLOBAL TIER-1 SUPPLIERS

30+ OUT OF 100 BIGGEST GLOBAL SUPPLIERS ARE IN TÜRKİYE

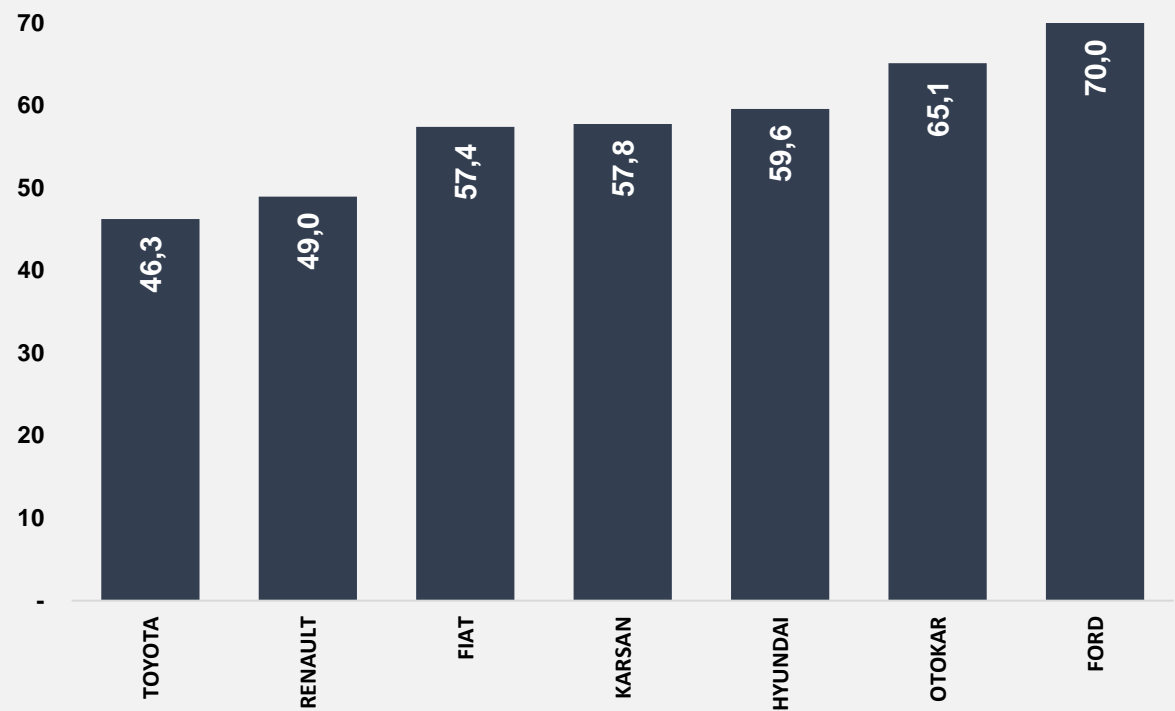


HIGH LOCAL CONTRIBUTION RATES

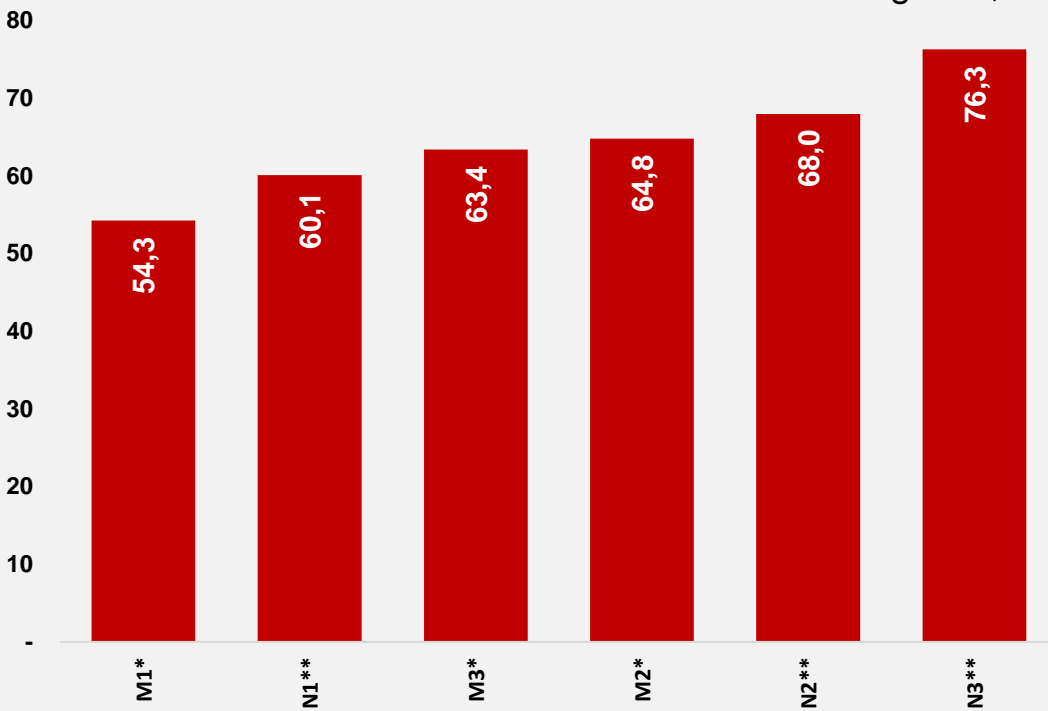
LOCAL MANUFACTURERS' LOCALISATION
RATE IS WELL ABOVE THE 50%



Localization Rates
for Brands, %



Localization Rates
for Vehicle Categories, %



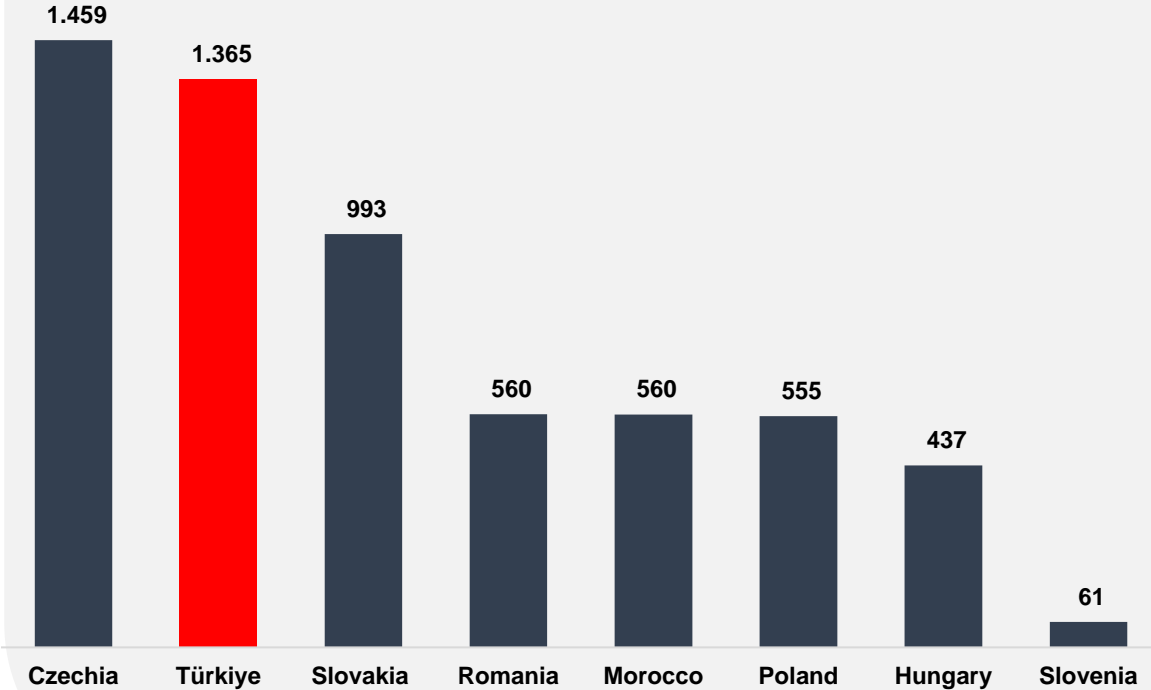
Source: Ministry of Industry and Technology
* "M1: Passenger Car", "M2: Minibus", "M3: Bus"; ** N1< 3.5 tons< N2< 12 tons< N3

LEADER OF THE REGION IN AUTOMOTIVE

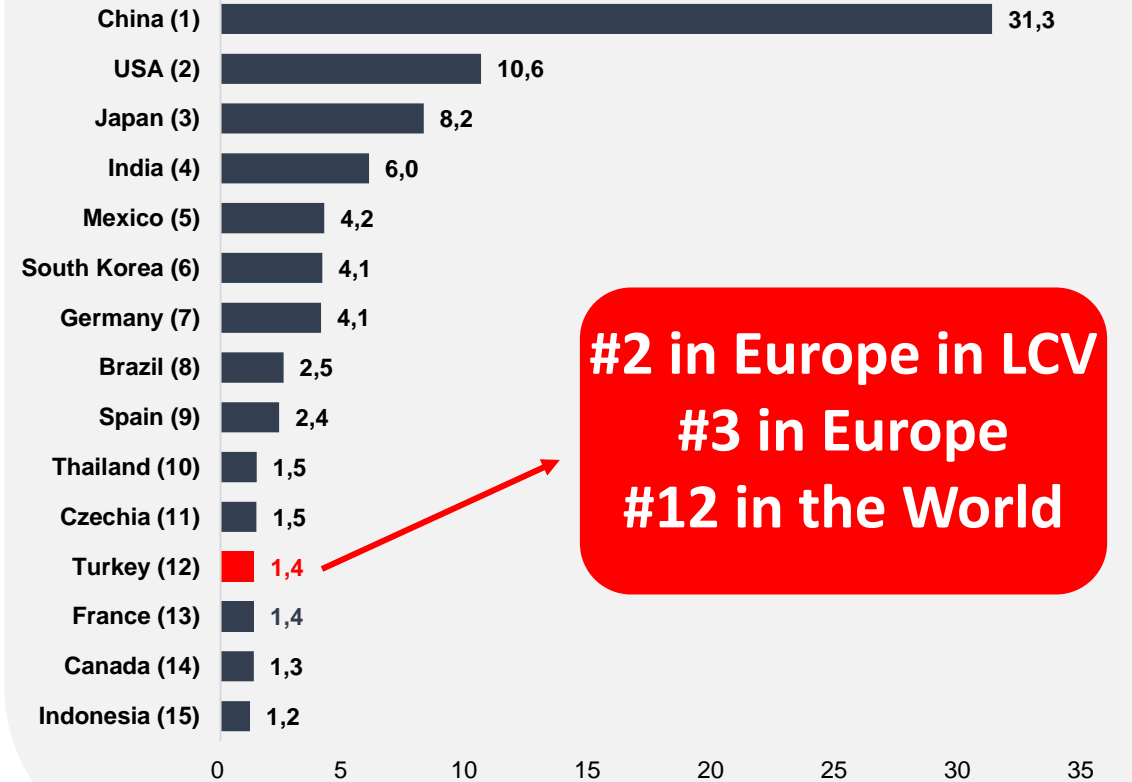
ONE OF THE MOST IMPORTANT AUTOMOTIVE
MANUFACTURER IN EU & IN THE WORLD



Automotive Production in 2024 Thousands unit



World Automotive Production, 2024 Million



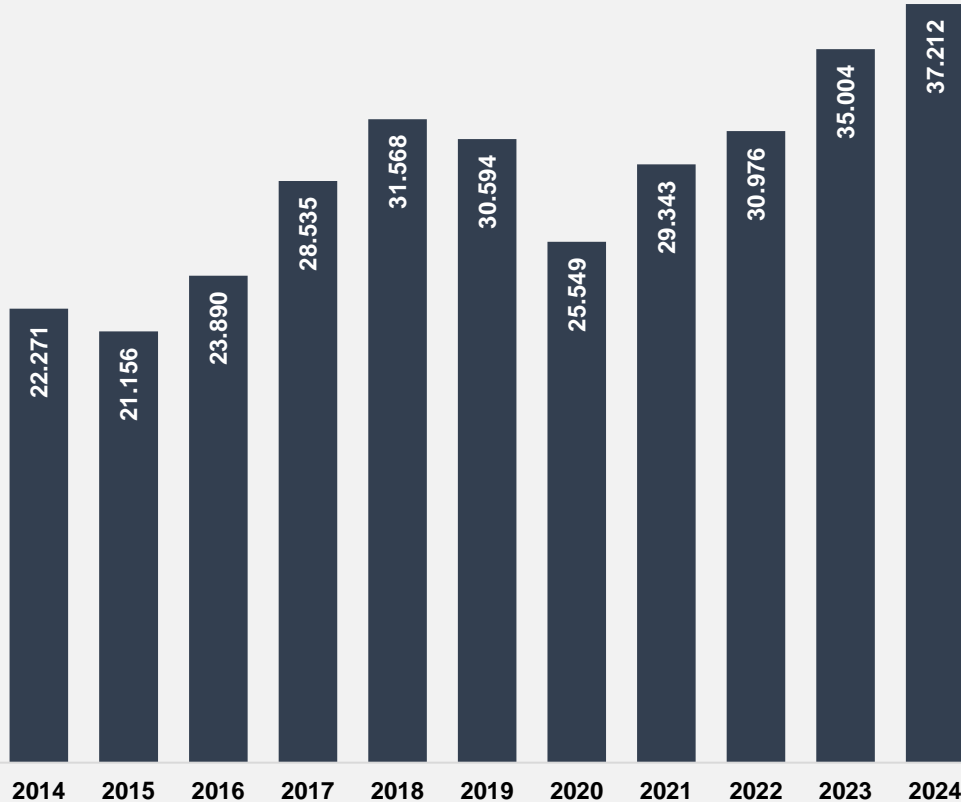
#2 in Europe in LCV
#3 in Europe
#12 in the World

PRODUCING VEHICLES FOR WORLD MARKETS

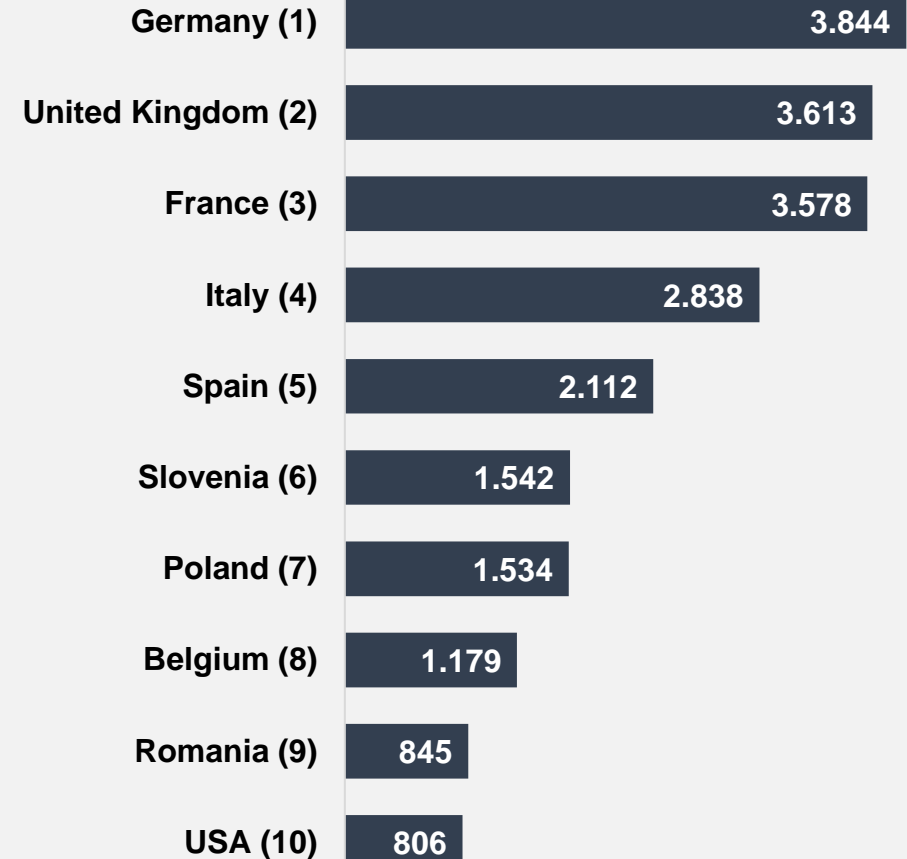
TOP EXPORTING MARKET IS EU



Vehicle Exports (Million \$)



Top Auto Export Markets 2024 (Million \$)



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RECENT INVESTMENTS

535k NEW CAPACITY from
GREENFIELD INVESTMENTS of
CURRENT, and NEW OEMs



Togg

Capacity: 175k/ year

\$2 billion investment

Full BEV production

**First model has rolled
off the line by April
2023**

FORD OTOSAN

Capacity: 210k/ year

\$3 billion investment

**Full-electric Transit
model**

**First model has
rolled off the line by
April 2022**



Capacity: 150k/ year

\$1 billion investment

**EV-PHEV Mix
Production**

**After 29 years, first OEM
investment**

By 2026



RECENT INVESTMENTS

- Renault announced 400 mn USD new investment in December 2023
- 4 new models including hybrid and EV by 2027

OYAK RENAULT

- 330 mn USD PHEV C-HR model investment by Toyota
- First PHEV plant of Toyota in Europe
- Started to production by November 2023

 **TOYOTA**

MORE INVESTMENTS

- ZF CVS opened up new facility in Sakarya/ Türkiye
- 30 m USD investment
- 4th production facility



- Electric car components investment
- Electrical Powered Compressor
- 180 m USD investment

Valeo

RECENT DEVELOPMENTS IN E-MOBILITY

DEVELOPING BATTERY ECOSYSTEM



**20 GWh annual
capacity**

**Battery production
has started**

by 2026



**220 MWh annual
capacity**

**Li-ion cylindrical
battery cells**

In June 2022



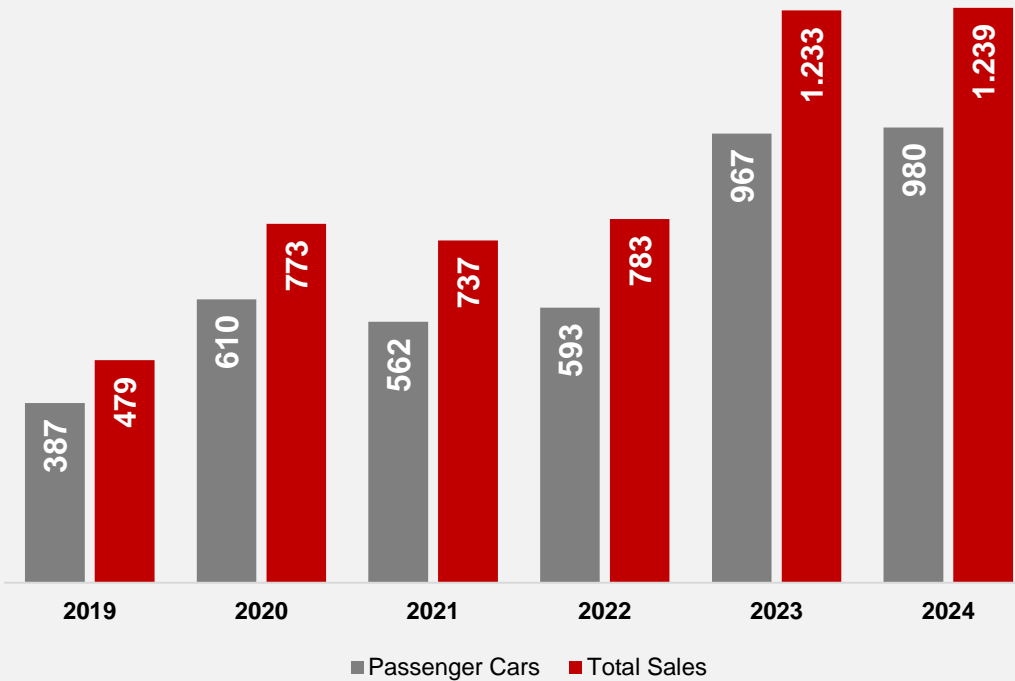
3 GWh annual capacity

**Li-ion (LiFeP04) battery
cells and ESS**

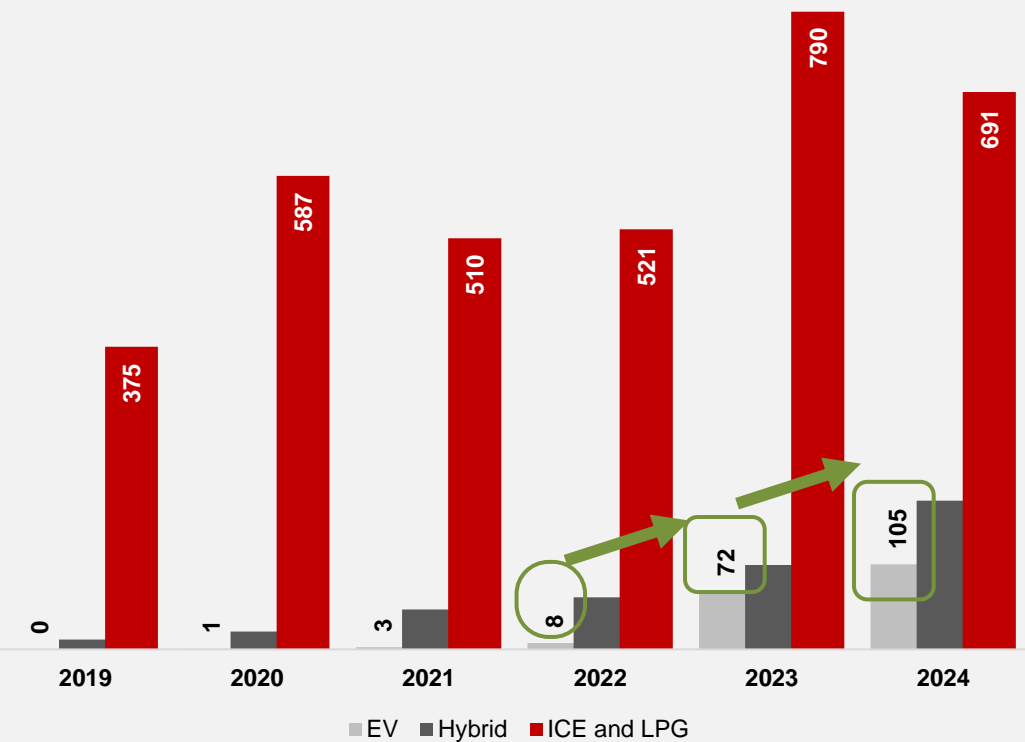
by 2024



Motor Vehicle Sales
(Thousands)



Passenger Car Sales
(Thousands)

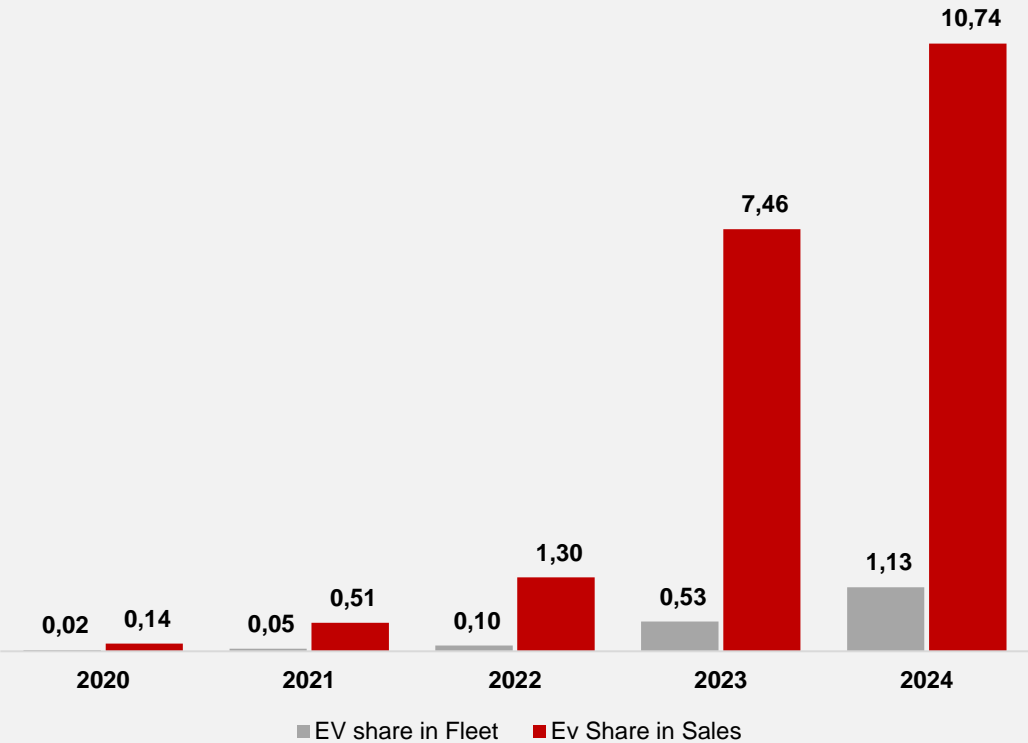


CHARGING INFRASTRUCTURE

AS OF END NOVEMBER 2024, 25,096 CHARGING POINTS ARE IN OPERATION, OF WHICH 9,769 ARE DC



EV Passenger Cars Share (%)



Charging Points

	2020	2021	2022	2023	2024
Charging Points (total)	1.355	2.237	2.532	12.510	27.048
AC	1.264	2.070	2.173	8.706	16.141
DC	91	167	359	3.804	10.907
EV Cars Fleet	2.797	6.267	14.552	80.043	183.776
EV Cars per CP, %	2,1	2,8	5,7	6,4	6,8



EV and EV Technologies

1. Electric vehicle purchases will be supported
2. Electric vehicle use will be supported
3. Electric vehicle production investments will be supported, and new investments will be encouraged.
4. Türkiye will be a “regional battery production center”
5. Secondary use and recycling investments will be supported.
6. Developing of tier 1 and 2 suppliers producing electrification technologies will be provided.
7. The advanced material support program will be launched.
8. Charging infrastructure for electric vehicles will be completed.

Critical Projects

The projects on Battery and Innovative Energy Technologies are evaluated as ‘critical project’;

Development and/or manufacturing investments of battery module and pack

Battery cell investments

Development and manufacturing investments of battery pack sub-components

Battery test center investments



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%
- Employment Supports
- Tax exemptions
- Allocation of Investment Land
- Financing supports

HIT-Electric Vehicles

“Türkiye is the 3rd largest automobile manufacturer in Europe and the 12th largest in the world. In commercial vehicle production, it is the leader in Europe.”

“With the HIT-Mobility call, it is aimed to increase Türkiye’s strength in the automotive industry in the field of electric vehicle production.”

“With a **total support budget of \$5 billion**, the goal is to reach an annual **production capacity of 1 million electric vehicles.**”

“Within the scope of the call, new investments will be supported, including the establishment of R&D centers with a high local contribution rate, providing an annual production capacity of **at least 150,000 electric vehicles.**”



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%
 - Employment supports
 - Tax exemptions
 - Allocation of investment land
 - Financing support
- Up to \$6,000 grant per MWh until year 2030

HIT-Battery

“Energy storage systems play a critical role in achieving the net-zero emission target.”

“With the HIT-Battery call, it is aimed to bring Türkiye’s production capacity in this field to a level that meets domestic demand and particularly leverages export potential towards the European market.”

“With a **total support budget of \$4.5 billion**, the goal is to **establish a production capacity of 80GWh**, focusing on local contribution and including R&D center investments.”

“Within the scope of the call, investments in battery and active material production facilities starting from the cell-level with a **minimum annual capacity of 5GWh will be supported.**”



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

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