

Türkiye's auto exports hit a record **\$41.5B.** Nearly three-quarters go to the EU.

Automotive is one-sixth of everything Türkiye sells abroad — and the EU took 72.5% of its export value in 2025.

THE EXPORT ENGINE

Türkiye's car trade, in three numbers.

2025 RECORD

\$41.5_B

Automotive sector exports — an all-time high, up 11.6% on 2024.

EU SHARE

72.5%

Of 2025 automotive export value went to EU countries.

SHARE OF EXPORTS

~1/6

Automotive's slice of everything Türkiye exports — 16.8% in May 2026.

THE 2026 SIGNAL

A record base, a softer May.

1 **Record base.** 2025 closed at \$41.5B, and the sector set a \$43B target for 2026.

2 **Softer May.** May 2026 exports fell 17% year-on-year to \$3.26B, with fewer working days cited as one factor.

3 **Still up.** Across January–May 2026 the sector is +2.6% at \$17B — against a \$43B full-year target.

WATCHPOINT – THE EU TEST

The variable isn't Türkiye. It's Europe.

WHERE THE CEILING IS SET

The EU took **72.5%** of 2025 export value, so European demand sets the ceiling — and EU van registrations fell **8.8%** in 2025. On top of demand, the EU is weighing **production-origin conditions** in proposed industrial and automotive support rules — not enacted, but material for plant-location decisions. Türkiye builds for the EU; the dependence cuts both ways.

STRATEGIC BOTTOM LINE

Türkiye built a record car-export engine. Europe still decides how fast it runs.

Renault moving Boreal production to a second hub in Bursa this year is one visible bet that Turkish lines stay relevant.

For the Turkish auto-supply chain, the 2026 read is concentration risk — European demand and EU rules now move the export order book more than domestic conditions do.

WHAT TO WATCH NEXT

Three signals on the auto corridor.

A **Monthly prints.** OİB's monthly export value and EU-country splits — working-day-adjusted, not the headline number.

B **EU rules.** The Industrial Accelerator Act and clean-fleet package — and whether "Made in EU" treatment includes Türkiye under the Customs Union.

C **New capacity.** Renault's Bursa ramp, and whether full-year utilisation climbs from ~67% (2025 OSD).