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238,000

Turkey's passenger electric vehicle sales in 2025

22%

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42%

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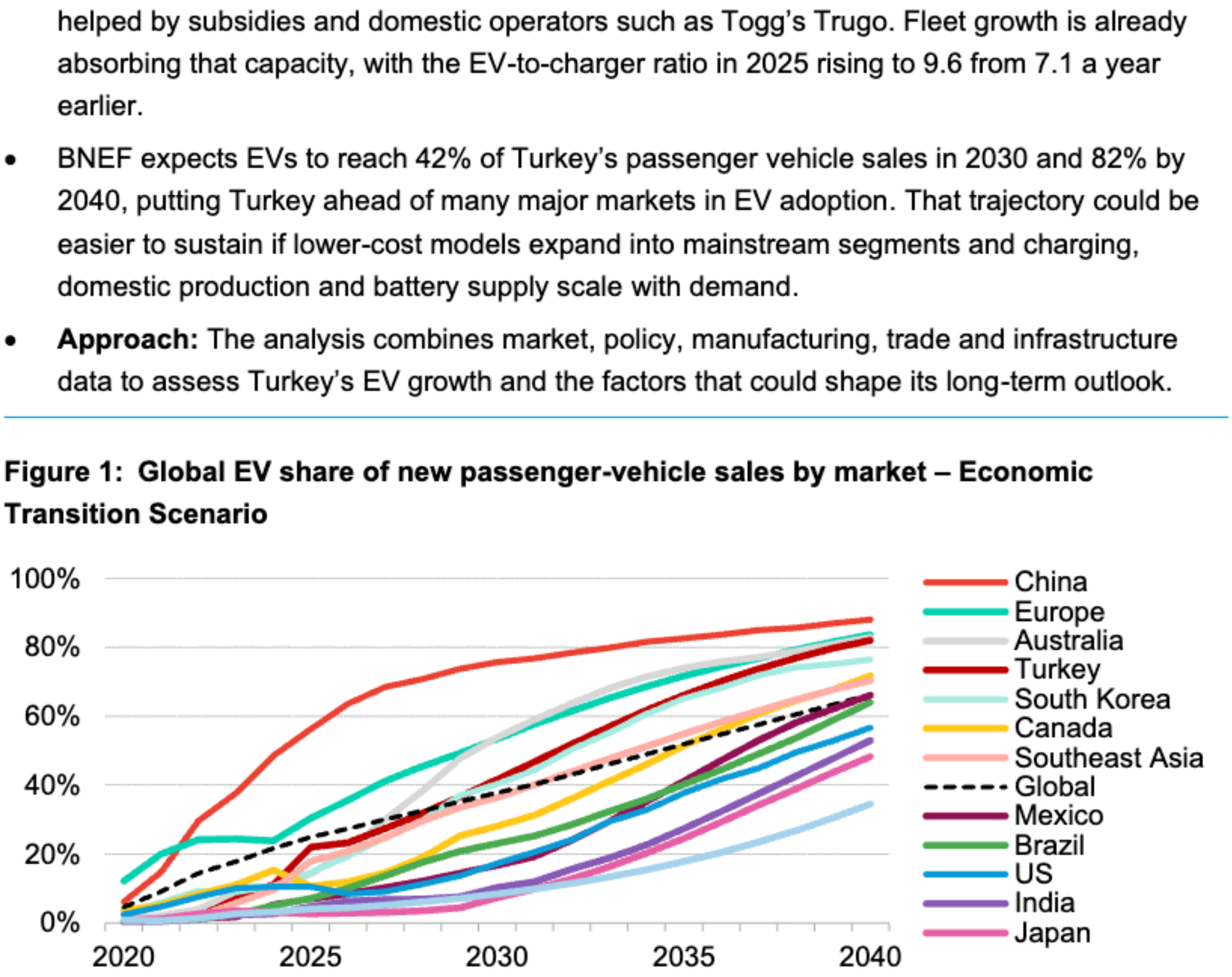
Turkey's EV Boom Tests Its Localization Push

Turkey's passenger electric vehicle market has grown from a niche segment to one of the largest in Europe, the Middle East and Africa. The country is using policy to expand EV demand and build domestic production and battery supply chains, though the automotive transition continues to rely largely on imports. Scaling beyond the policy-backed phase will depend on whether model availability, affordability, charging networks and local supply chains can grow fast enough to support mass-market adoption.

- Since 2019, passenger EV sales in Turkey have risen much faster than internal combustion engine vehicle sales, reaching almost 238,000 units in 2025. Tax incentives helped lower purchase costs and boost demand for EVs, while localization-linked trade and industrial policies helped domestic brands like Togg and Chinese players like BYD gain market share.
- Turkey's established automotive manufacturing base gives it a head start in EV assembly, but battery localization remains at an early stage. Togg is scaling dedicated EV capacity, and incumbent international automakers are moving toward flexible lines. Imported battery cells and components are still a near-term dependency.
- Turkey's public charging network nearly tripled year-on-year to 35,000 connectors in 2025, helped by subsidies and domestic operators such as Togg's Trugo. Fleet growth is already absorbing that capacity, with the EV-to-charger ratio in 2025 rising to 9.6 from 7.1 a year earlier.
- BNEF expects EVs to reach 42% of Turkey's passenger vehicle sales in 2030 and 82% by 2040, putting Turkey ahead of many major markets in EV adoption. That trajectory could be easier to sustain if lower-cost models expand into mainstream segments and charging, domestic production and battery supply scale with demand.
- **Approach:** The analysis combines market, policy, manufacturing, trade and infrastructure data to assess Turkey's EV growth and the factors that could shape its long-term outlook.

Figure 1: Global EV share of new passenger-vehicle sales by market – Economic Transition Scenario



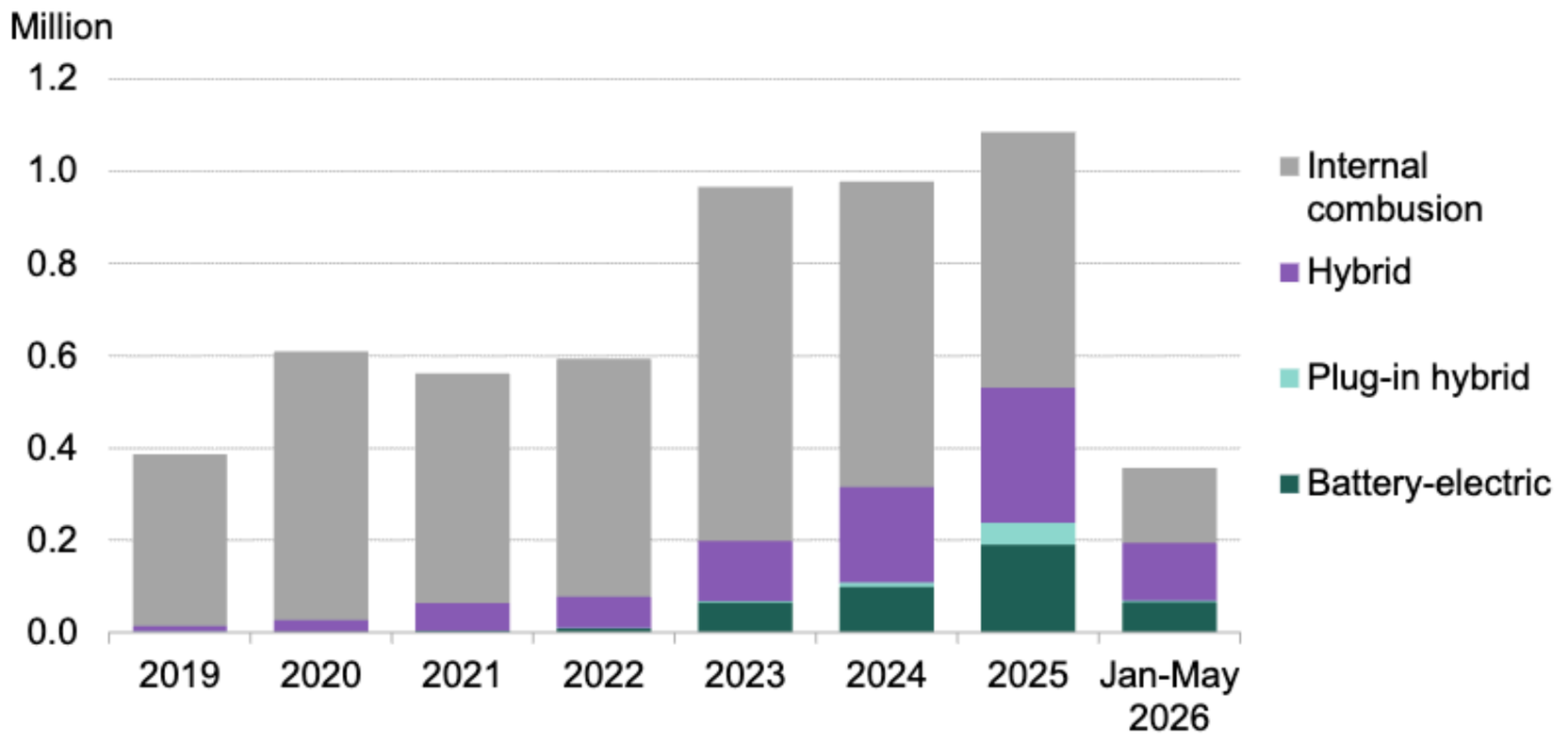
Source: BloombergNEF. Note: "Europe" refers to the European Union, the UK and European Free Trade Association markets. Electric vehicles include battery-electric and plug-in hybrid vehicles.

1. EV adoption moves from niche to mainstream

Turkey's passenger electric vehicle sales, including battery electric and plug-in hybrid models, reached almost 238,000 units in 2025 (Figure 2), making it the fourth-largest EV market in Europe, the Middle East and Africa (EMEA) by absolute sales (Figure 3). EV sales have grown much faster than internal combustion engine (ICE) vehicle sales since 2019, and recent growth in Turkey's passenger vehicle market has come mainly from electric models.

EVs represented 22% of passenger vehicle sales in Turkey in 2025, up from less than 1% in 2021 (Figure 4). This ranks as one of the fastest increases in EV adoption in EMEA, with EV share doubling each year on average over the past five years.

Figure 2: Passenger vehicle sales by drivetrain, Turkey



Source: BloombergNEF, JATO Dynamics. Note: "Hybrid" includes full- and mild-hybrid vehicles.

Battery electric vehicles (BEVs) have led the electrification shift, supported by wider model availability, more favorable tax treatment and fast charging rollout. Passenger BEVs posted a compound annual growth rate of 200% from 2019 to 2025, compared with nearly 100% for plug-in hybrids (PHEVs), albeit both grew from a low base.

Figure 3: Passenger EV sales in selected markets

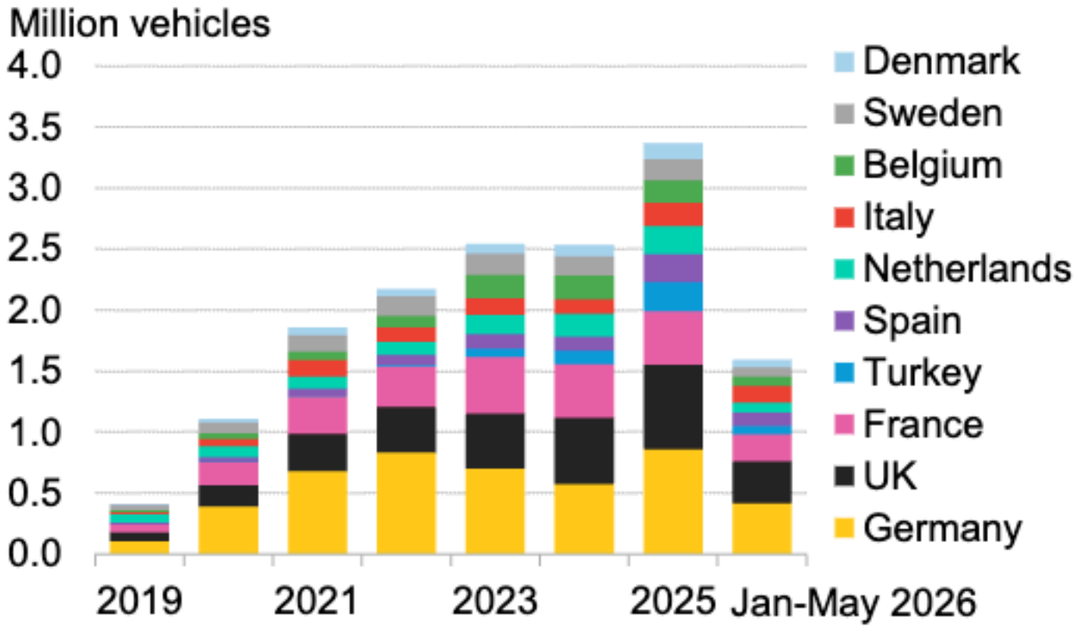
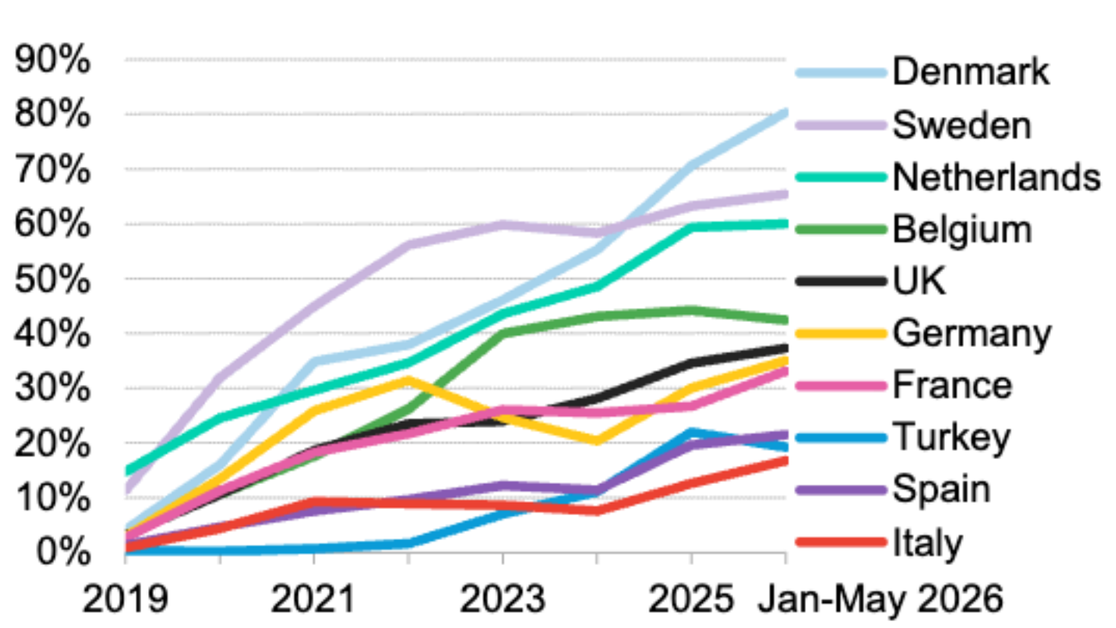


Figure 4: Electric share of passenger vehicle sales in selected markets



Source: BloombergNEF, JATO Dynamics. Note: Electric vehicles (EVs) include battery-electric vehicles and plug-in hybrid vehicles.

Turkey Transition Factbook

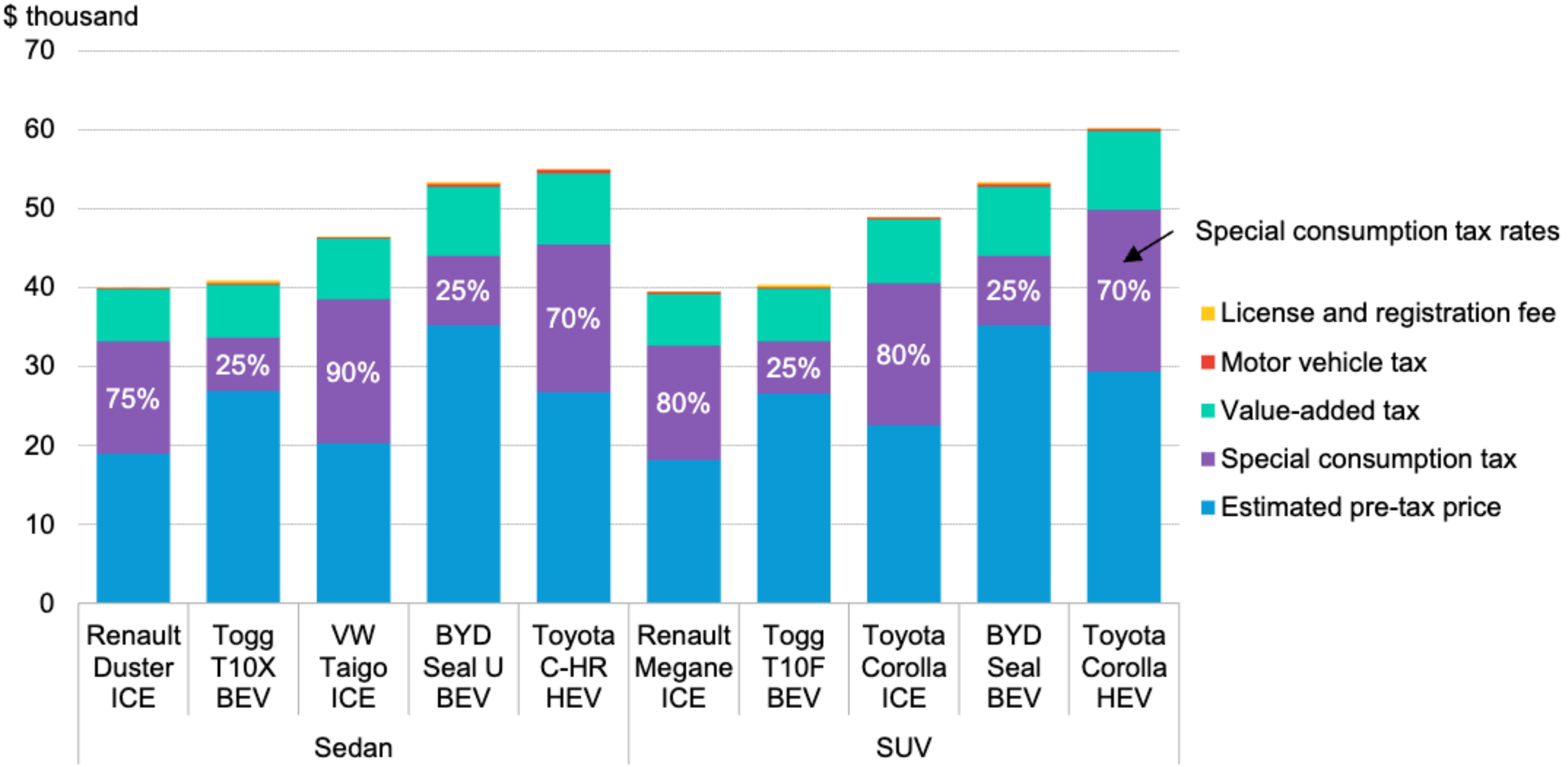
BNEF's *Turkey Transition Factbook 2026* (web | terminal) examines the country's progress across power, transport, industry and sustainable finance, and assesses the scale of investment required to meet its long-term climate ambitions while strengthening energy security and industrial competitiveness. This report contains information from the Factbook.

2. Policy and new entrants shape Turkey's EV market

Tax incentives are helping spur EV demand in Turkey, but localization-linked trade and industrial policies are shaping who can capture it. The government has lowered EV purchase and ownership costs through tax treatment rather than direct purchase subsidies, all while using tariffs, investment support and domestic production incentives to steer market share toward companies willing to manufacture locally.

Consumer support for EVs is anchored by the Special Consumption Tax (SCT) and Motor Vehicle Tax (MTV) advantages. The SCT, which is levied as a percentage of a vehicle's pre-tax price, strongly favors EVs over ICE models. SCT rates for ICE vehicles can range from 80% to 220%, compared with 25% to 75% for BEVs and 45% to 85% for PHEVs, depending on vehicle specifications, such as motor power and price (Figure 5). EVs also benefit from lower MTV rates – an annual levy on registered vehicles – with reductions up to 75% compared with ICEs.

Figure 5: Consumer delivery price for selected passenger vehicle models in Turkey



Source: BloombergNEF, automaker websites. Note: Uses base trim prices. BYD's prices as of February 2026 as Seal and Seal U 160-kilowatt base trims have been removed from sales and current 390kW trims start at $87,000. Other models are as of June 2026. Currency exchange rate uses 1 dollar = 46.7 Turkish Lira.

Turkey's industrial policy extends the support into local manufacturing. Under the High Tech Türkiye (HIT-30) scheme, the government plans to provide $5 billion in tax incentives, financial support, employee support and land to build annual production capacity of at least 150,000 EVs by 2030.

Türkiye'nin Otomobili Girişim Grubu or Togg, Turkey's domestic EV manufacturer, exemplifies how policy support can bolster a national EV player. The company captured a dominant 30% share of the EV market in its debut year, 2023. Its share nearly halved to 16% in 2025 as competition from BYD intensified, but it has begun to rebound in 2026 (Figure 6).

The emergence of Chinese automakers shows how Turkey's trade measures can redirect market access toward companies that commit to local production. BYD became Turkey's largest EV player in 2025, after its planned $1 billion investment in a factory in the Anatolian city of Manisa qualified the company for an exemption from Turkey's 40% additional import duties on China-made EVs. The EV maker raised vehicle prices in the first two months of 2026, following reports that its import tax advantages had ended. Chinese automakers together accounted for just under 24% of EV sales in Turkey in 2025, up from 17% in 2024.

Overall, Turkey's EV market is less concentrated and less dominated by legacy automakers than its ICE market. The top five automakers by volume made up nearly 86% of ICE sales in the first five months of 2026, compared with 70% for EVs (Figure 7).

Figure 6: Automaker share of passenger electric vehicle sales in Turkey

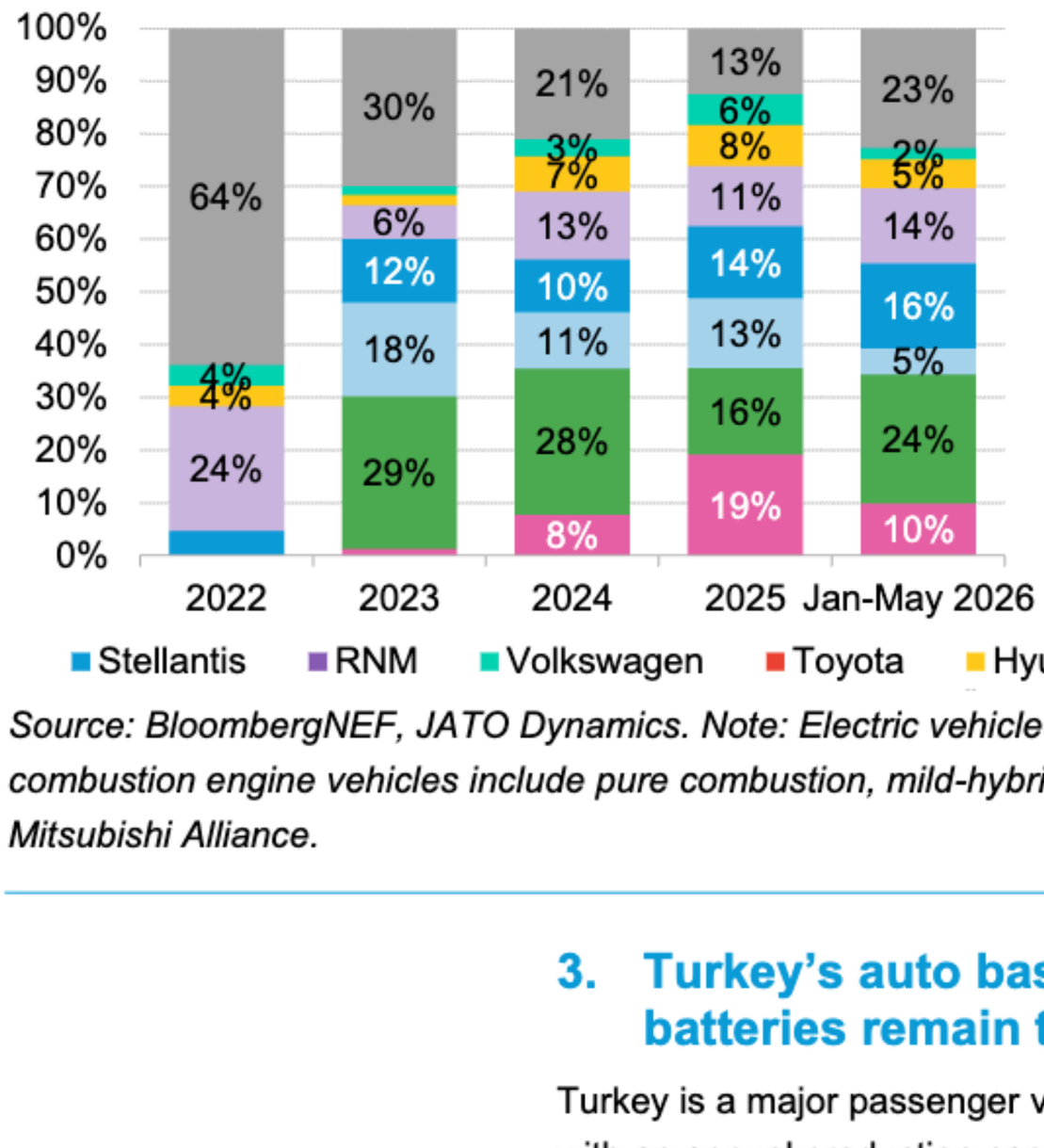
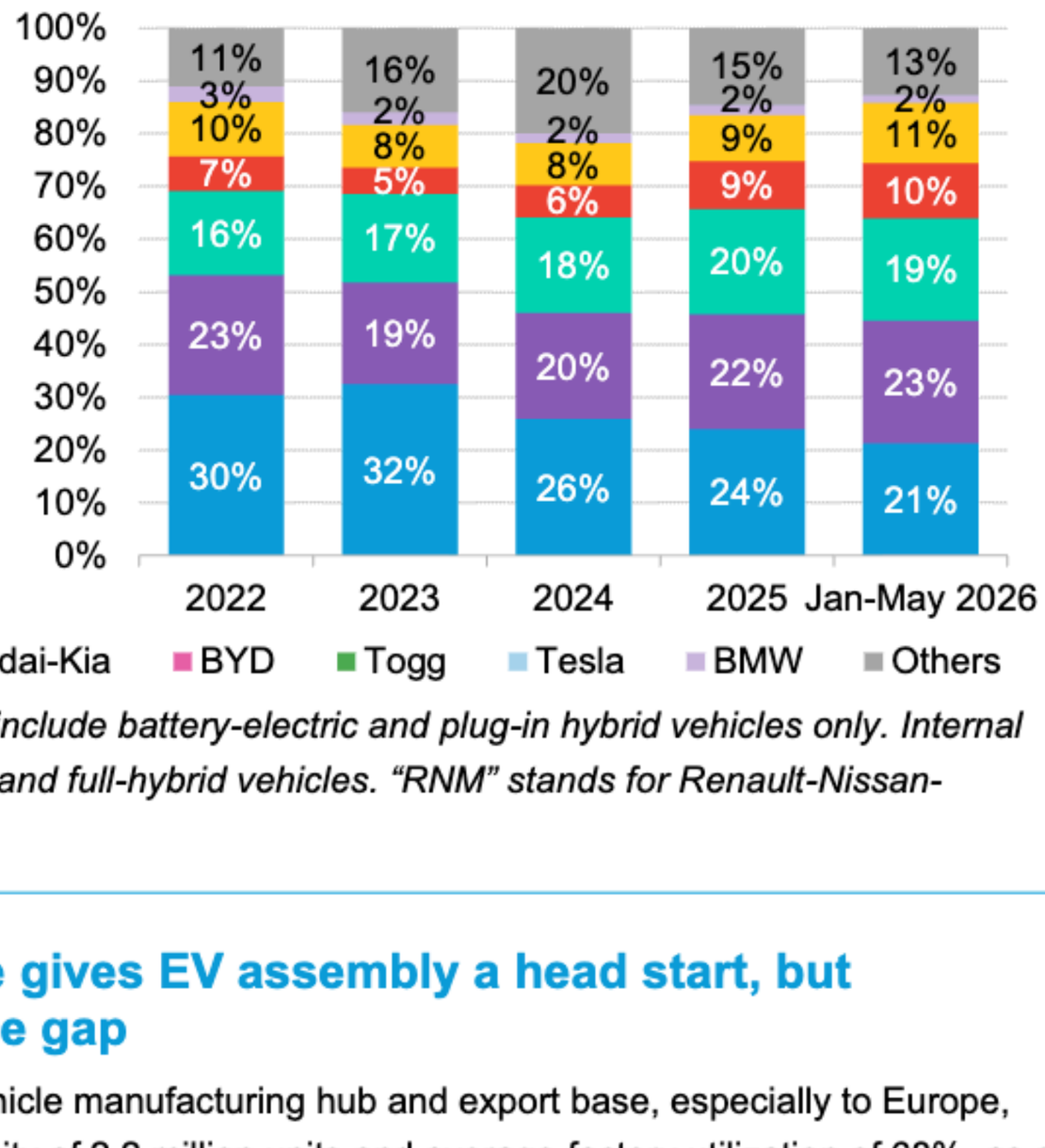


Figure 7: Automaker share of internal combustion engine passenger vehicle sales in Turkey



Source: BloombergNEF, JATO Dynamics. Note: Electric vehicles include battery-electric and plug-in hybrid vehicles only. Internal combustion engine vehicles include pure combustion, mild-hybrid and full-hybrid vehicles. "RNM" stands for Renault-Nissan-Mitsubishi Alliance.

3. Turkey's auto base gives EV assembly a head start, but batteries remain the gap

Turkey is a major passenger vehicle manufacturing hub and export base, especially to Europe, with an annual production capacity of 2.2 million units and average factory utilization of 68%, as of 2025 (Figure 8). International automakers, including Ford, Stellantis, Renault, Toyota and Hyundai, accounted for nearly 90% of that capacity last year, and new investment is gradually shifting toward flexible lines that can produce both EV and ICE models (Figure 9). Ford led with 547,000 units of mixed EV and ICE capacity, after repurposing its Golcuk and Yenikoy factories in 2019 and 2023, respectively.

Domestic brands are adding dedicated EV capacity. Togg targets output of 60,000 EVs in 2026 and expects to reach full annual capacity of 100,000 units by 2027 at its Gemlik factory, with potential to expand to 175,000 vehicles per year. State support has helped that capacity buildout,

including tax cuts, low borrowing costs and a purchase guarantee of 30,000 cars a year through 2035, among other incentives.

Foreign investment could expand Turkey's dedicated EV capacity beyond domestic manufacturers, but execution remains uncertain. BYD agreed with the Turkish government to build a $1 billion plant with annual capacity of 150,000 vehicles, but the project was put on hold in June 2026. The company is redirecting its focus toward finding an existing factory in Europe to supplement its plant in Hungary, Deputy CEO Stella Li told *Reuters*. The Hungary plant is scheduled to start production in the final quarter of 2026. The delay shows that Turkey's localization-linked policy can attract EV manufacturing commitments but does not guarantee timely capacity additions.

Battery localization is beginning, but it is still behind EV assembly uptake. Siro, a joint venture between Togg and Chinese battery maker Farasis, has been producing battery modules and packs since March 2023. The plant boasts a total capacity of 3 gigawatt-hours per year. Siro plans to commission a new cell production plant by the end of 2026 and add 20GWh of capacity by 2031, the first battery cell manufacturing facility in the country. Even if commissioned on schedule, the plant will take time to ramp up. Rising EV and battery demand could still leave Turkey reliant on imported battery cells and materials.

Figure 8: Passenger vehicle manufacturing capacity, by drivetrain

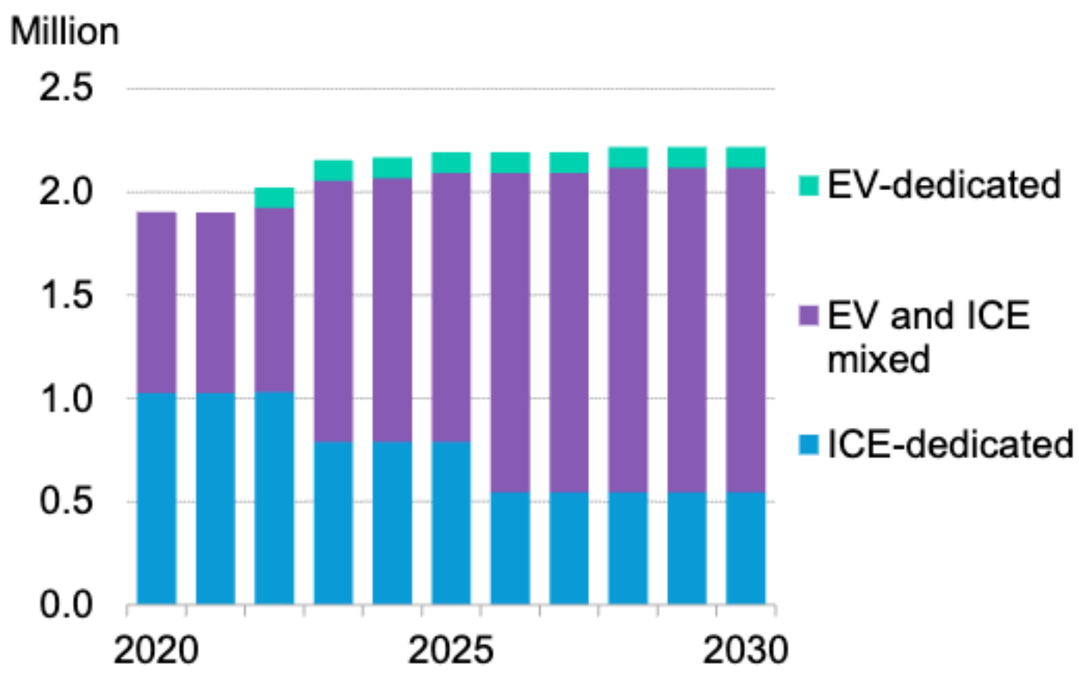
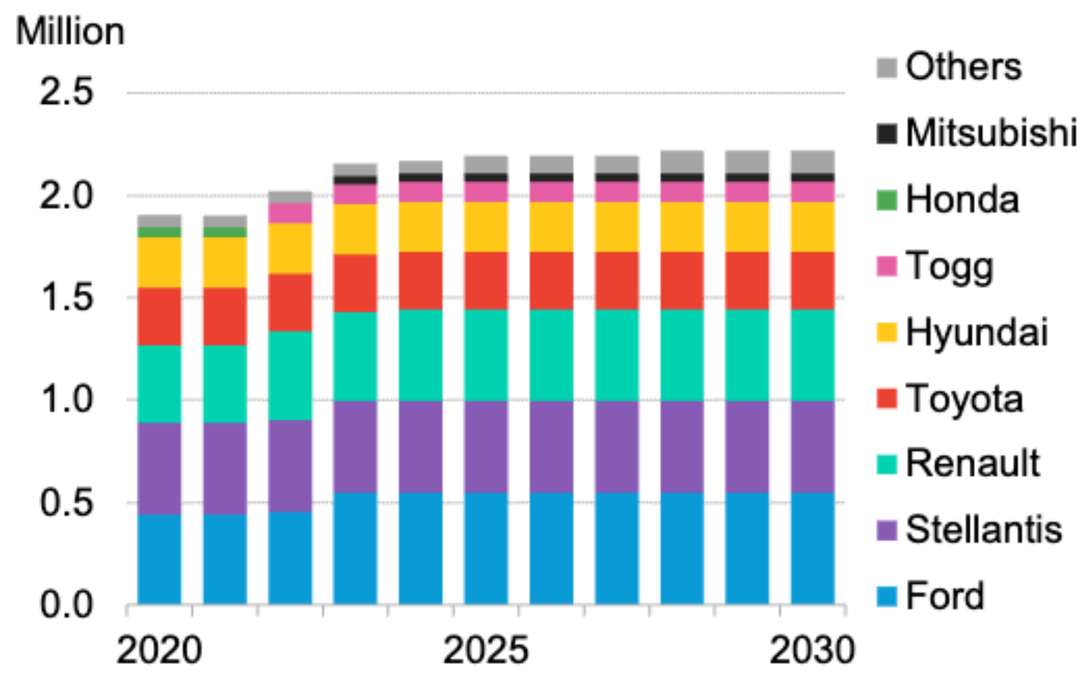


Figure 9: Passenger vehicle manufacturing capacity, by automaker



Source: Source: BloombergNEF, MarkLines, just-auto, Turkish Automotive Manufacturers Association (OSD). Note: EVs are electric vehicles, including battery-electric and plug-in hybrid vehicles. ICE refers to internal combustion engine vehicles.

4. Turkey's EV push reshapes trade

Turkey's EV growth currently depends on imported EVs and batteries, even as the government pushes to localize the value chain. The country imported nearly 210,000 passenger EVs in 2025, up from 90,000 in 2024 (Figure 10). Germany accounted for 37% of total EV imports, followed by China at 22%.

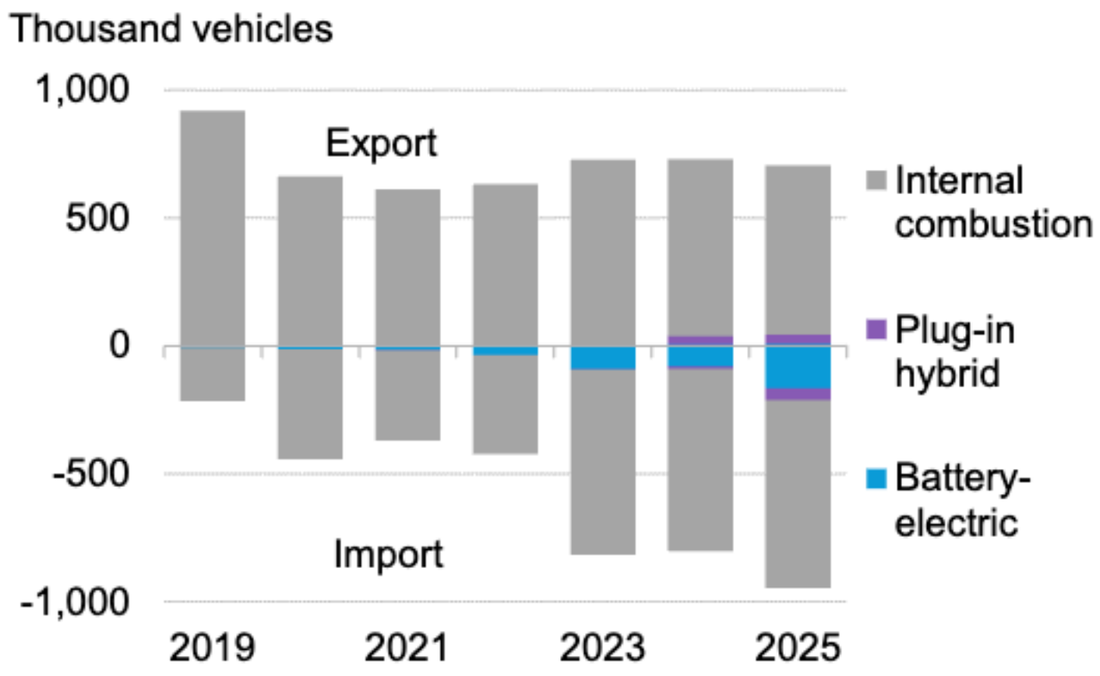
The Turkish government has raised tariffs to encourage local production. Passenger EVs imported from countries outside the European Union and Turkey's free trade agreement partners face an additional 30% duty, on top of the 10% base rate. China-origin EVs are subject to an extra 40% import duty, or a minimum charge of $7,000 per vehicle, whichever is higher.

Rising EV imports pushed total passenger vehicle imports to more than 947,000 units in 2025, with EVs making up 22% of the total. ICE vehicle imports also increased slightly, from 713,000 to 737,000 units.

Battery imports hit a record of nearly $1.8 billion last year (Figure 11). This reflects the country's young EV and battery-pack assembly industry, which still relies on imported cells, as well as rising demand from stationary storage applications. Planned domestic cell production could reduce that exposure over time, but the trade data shows battery localization remains nascent.

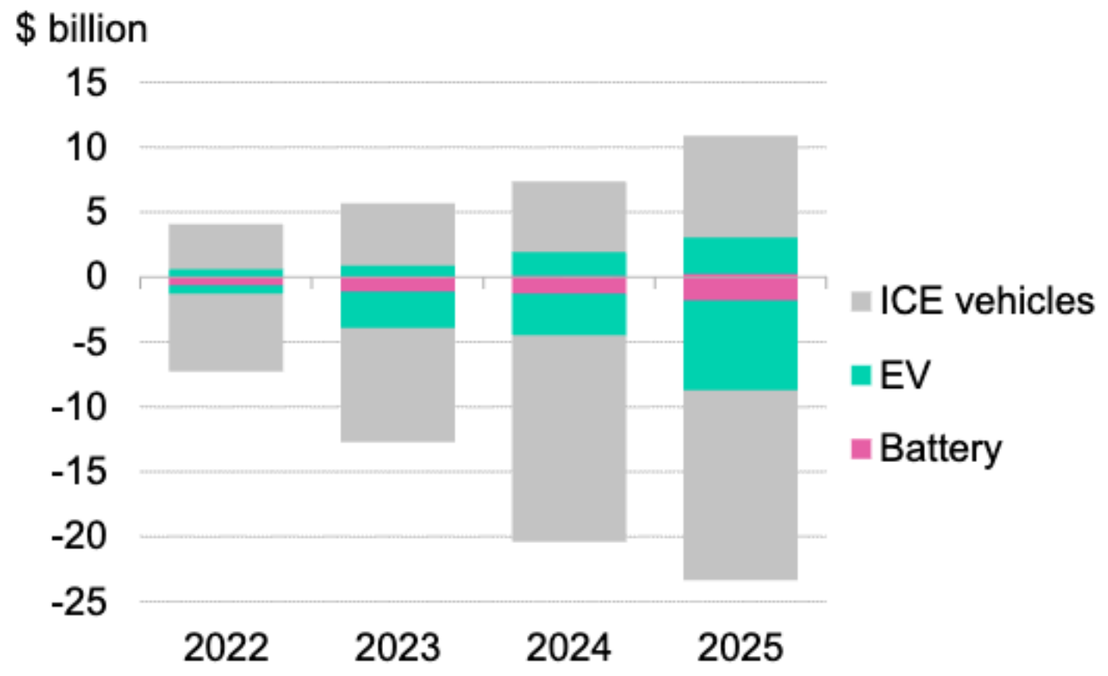
EV exports from Turkey grew 17% year-on-year to 44,000 units in 2025 but only accounted for 6% of its total passenger vehicle exports, and Turkey remained a net EV importer last year. Europe was the top destination for Turkey's car exports, for both electric and ICE models. However, the fast pace of electrification in Turkey could reshape the country's role in regional auto supply chains.

Figure 10: Turkey's passenger vehicle trade



Source: BloombergNEF, ITC Trade Map. Note: Uses HS code 870380 for battery-electric vehicles, 870360 and 870370 for plug-in hybrid vehicles, 8703 for total passenger vehicles, excluding 870310 for golf and snow cars.

Figure 11: Turkey's vehicle and battery trade balance



Source: BloombergNEF, Sinoimex. Note: Data as of Dec. 31, 2025. Electric vehicles (EVs) include battery-electric and plug-in hybrid passenger vehicles, electric buses and commercial vehicles. Battery to lithium-ion batteries and battery components. ICE refers to internal combustion engine.

5. Turkey's charging network grows alongside its EV fleet

Turkey's public charging network is expanding quickly, helped by subsidies and domestic operators. The public charging network rose to 35,000 connectors in 2025, up from 12,000 a year earlier (Figure 12). Chargers rated at 100 kilowatts or higher represented 30% of the total.

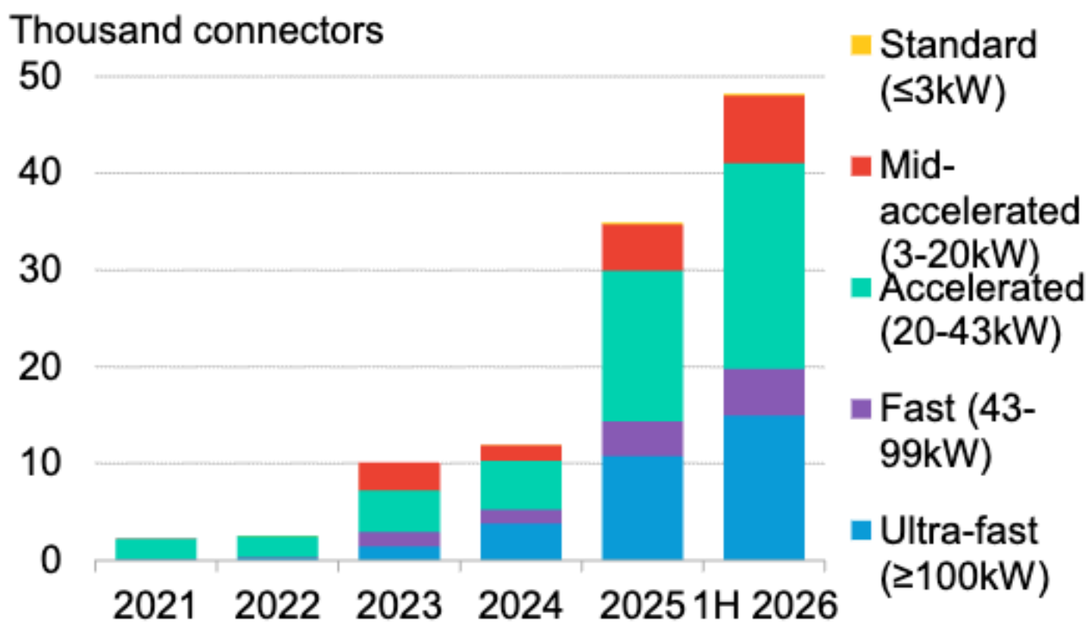
Policy support has focused on infrastructure buildout. Turkey offers targeted subsidies for the installation of public fast-charging (DC) stations through the Ministry of Industry and Technology's Fast Charging Stations Grant Program. This initiative provides direct financial grants covering up to 75% of the equipment and installation costs for investors setting up high-capacity charging points across the country. Public charging tariffs are not explicitly subsidized. Instead, regulators encourage competition and allow dynamic, off-peak pricing to lower user costs.

Domestic automakers, led by Togg, have helped accelerate nationwide charger deployment. Togg's fast-charging operator, Trugo, added most new connectors in 2025, with coverage across all 81 provinces. Utility-backed Zorlu Energy Solutions remained the largest network operator,

while operators like Esarj and Wat Mobilite, backed by energy and industrial majors like Enerjisa and Koc Holding, expanded aggressively.

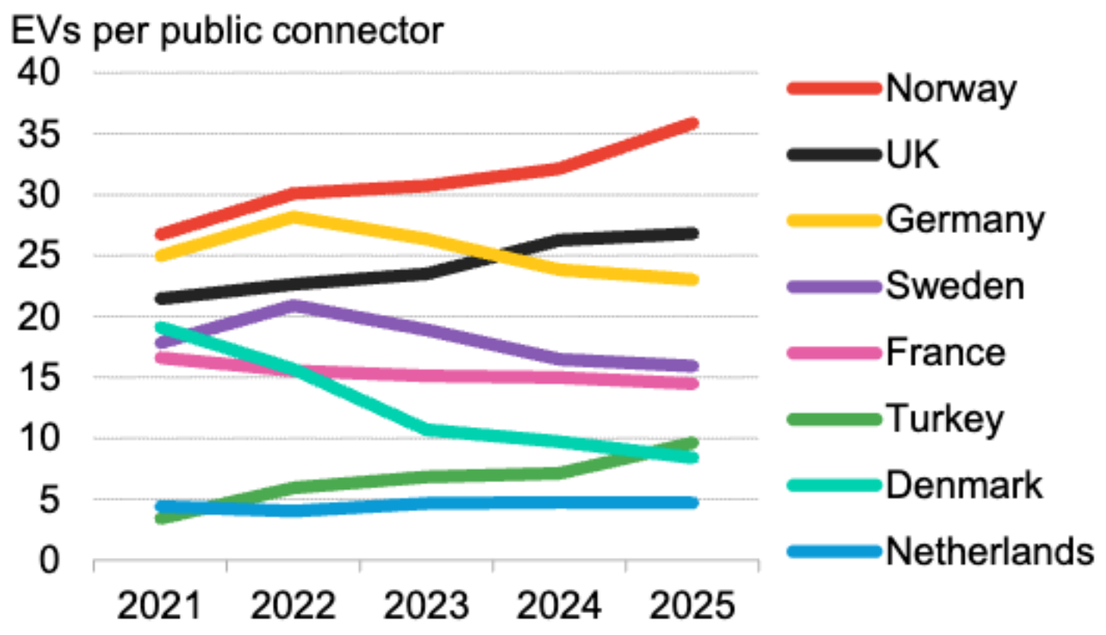
Still, EV fleet growth is outpacing charging infrastructure buildout in Turkey, with the EV-to-charger ratio growing to 9.6 in 2025 from 7.1 in 2024. This remains below more mature European EV markets (Figure 13), but its push for high-power networks puts its ratio of BEVs per ultra-fast connector at around 28 in 2025, compared with 50-150 in those European countries. See BNEF's *Global Public Charging Dashboard* (web) for more details.

Figure 12: Cumulative public charging connectors by power in Turkey



Source: BloombergNEF, Eco-Movement, Energy Market Regulatory Authority (EPDK). Note: kW is kilowatt.

Figure 13: EV-to-charger ratio in selected markets



Source: BloombergNEF, Eco-Movement, EPDK.

6. Outlook: EVs reach 42% of sales in 2030

BNEF expects Turkey's passenger EV sales to continue rising, approaching 550,000 units in 2030, or 42% of total passenger vehicle sales (Figure 14), according to the *Long-Term Electric Vehicle Outlook 2026* (web | terminal). By 2040, EVs make up 82% of Turkey's passenger vehicle sales and 38% of the total fleet (Figure 15). This would put Turkey ahead of most major markets on EV adoption (Figure 16)

Figure 14: Turkey long-term passenger vehicle sales outlook – Economic Transition Scenario

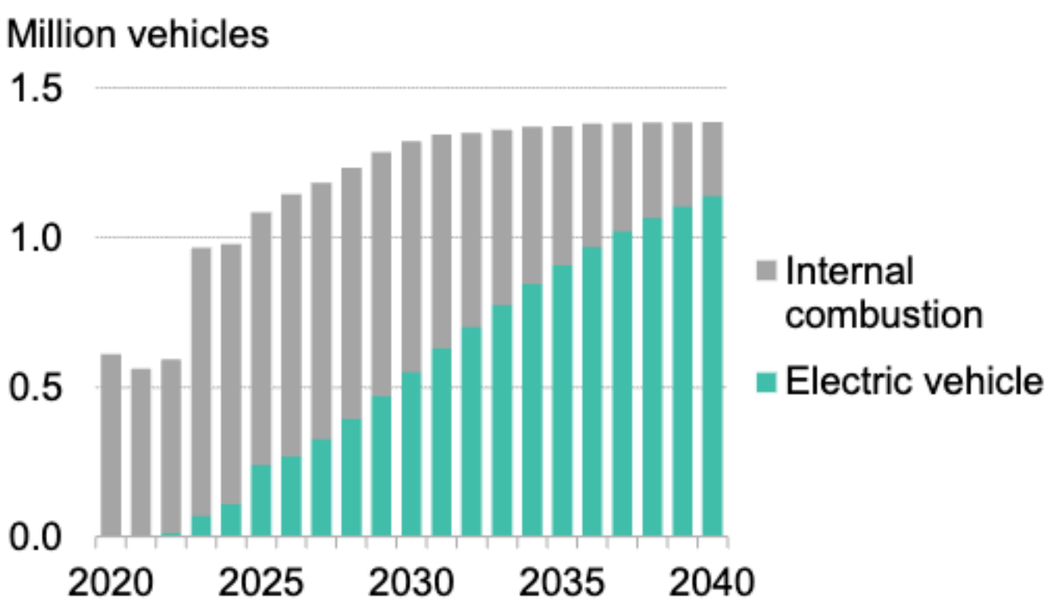
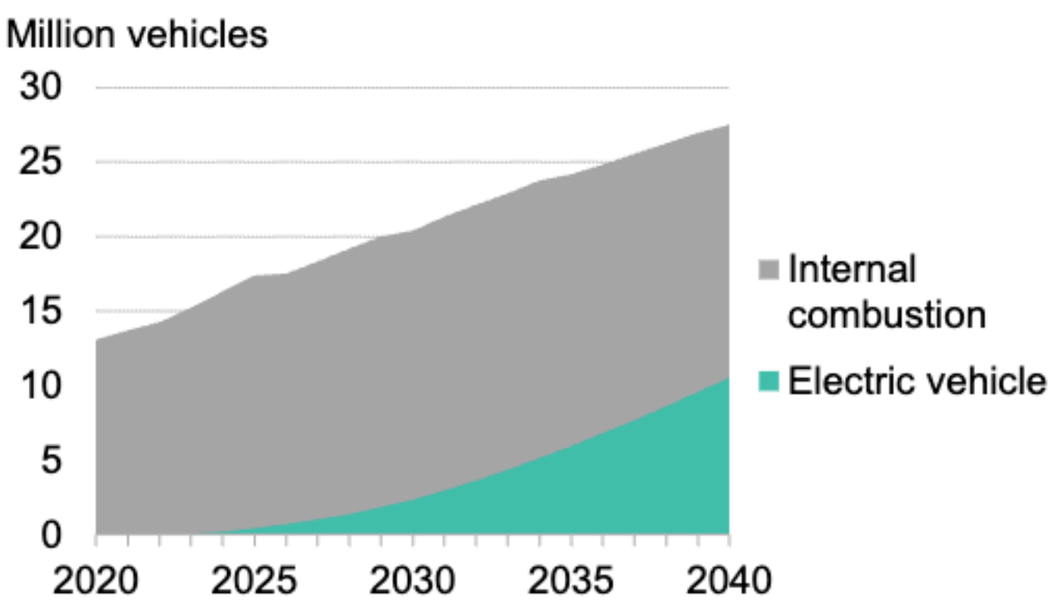


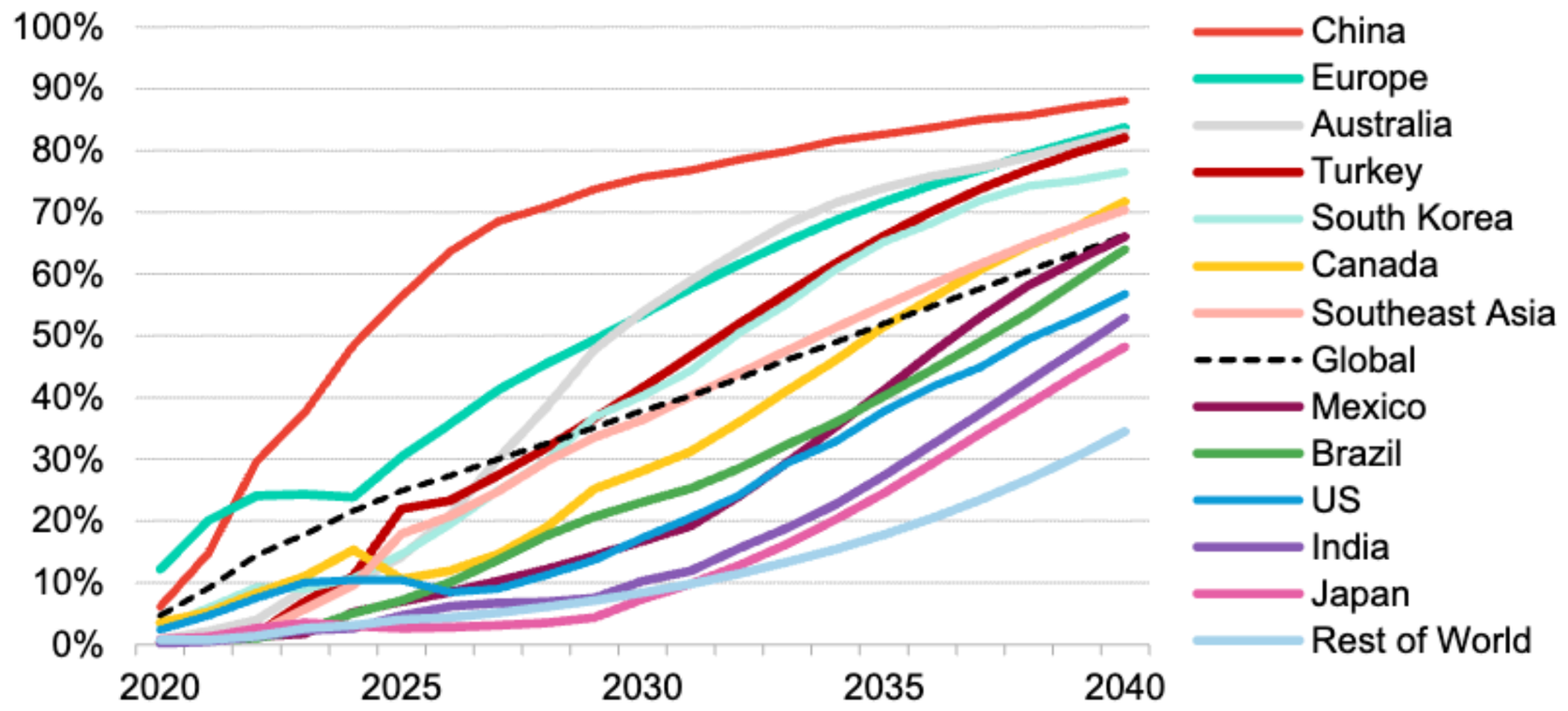
Figure 15: Turkey long-term passenger vehicle fleet outlook – Economic Transition Scenario



Source: BloombergNEF. Note: Electric vehicles include battery-electric and plug-in hybrid vehicles. "Internal combustion" vehicles include conventional internal combustion engine and hybrid vehicles.

Turkey's EV market is now concentrated around a small number of models, led by Togg and major foreign EV entrants. SUVs dominate the top EV ranks, while sedans grow on the back of Togg's T10F, Tesla's models and the BYD Seal. Lower-price EV options are expanding, particularly from Chinese and domestic brands, but adoption still appears heavily influenced by tax treatment, financial support and the flagship models.

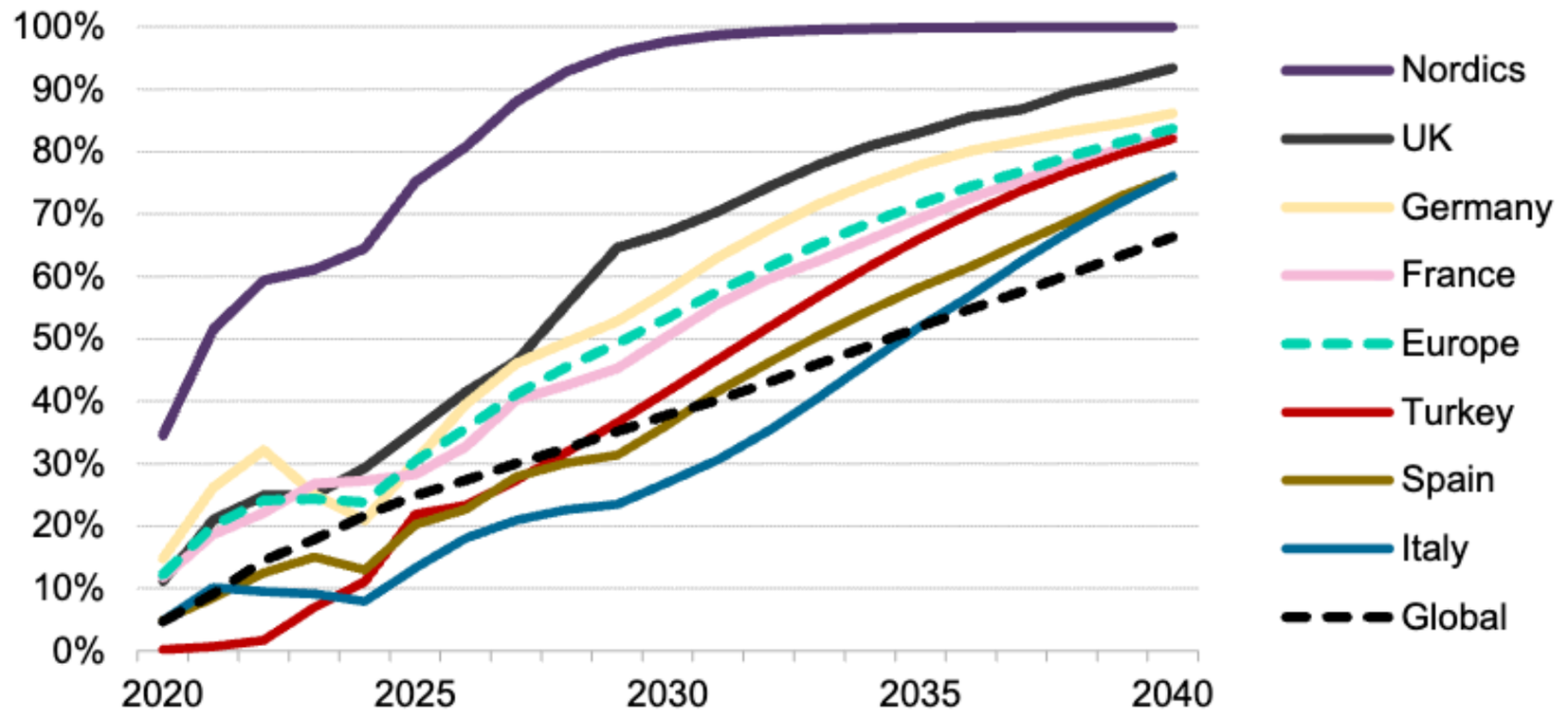
Figure 16: Global EV share of new passenger-vehicle sales by market – Economic Transition Scenario



Source: BloombergNEF. Note: "Europe" refers to the European Union, the UK and European Free Trade Association markets. Electric vehicles include battery-electric and plug-in hybrid vehicles.

This concentration makes model availability a test for Turkey's long-term EV outlook. If upcoming EV models expand into Turkey's mainstream segments and price bands, EV adoption is more likely to rise and move beyond its early, policy-driven stage quickly. If model choice remains concentrated, growth could slow after the early demand is saturated.

Figure 17: EV share of new passenger-vehicle sales in selected markets – Economic Transition Scenario



Source: BloombergNEF

That outlook also depends on the country's charging network, domestic production base and battery supply chain scaling fast enough to support demand. Turkey has shown that policy can help create EV demand and attract local ecosystem investment, but a broader mass-market transition would require sustained growth in products, infrastructure and supply chains.

Methodology

Turkey is categorized as a Tier 2 market in BNEF's *Long-Term Electric Vehicle Outlook 2026* (web | terminal). We collect historical data on passenger EV sales and total passenger vehicle sales – up to 2025 – for each market in the Tier 2 category. Using this data, we calculate the percentage share of EVs in total car sales for each market. We also collect historical retail electricity and gasoline prices for each market to calculate the $-per-kilometer cost of either charging an EV or refueling an ICE vehicle.

We assign archetype adoption curves to each of the groups based again on their past performance. We use those curves to forecast EV sales in each of the Tier 2 markets from 2026 to 2050.

Those curves are based on historical adoption data. We group Tier 2 markets into four categories according to the number of years required to reach each milestone, defined as EV adoption share in five-percentage-point intervals, and the average annual percentage point change in EV adoption. If, based on these metrics, a market falls into two different groups, we use the delta (difference) in refueling costs to determine whether it should be moved to a higher group: markets with lower per-kilometer charging costs are assigned to higher groups.

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