

Turkish Fastener Demanding Industries

Overview and 2026 Outlook

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Market Context

Türkiye has established itself as one of the fastest-rising fastener production and export hubs in Europe, leveraging its customs union with the EU, relatively competitive cost structure, and a maturing industrial base. Exports already account for more than half of national production, with the EU absorbing close to 60 percent of Turkish fasteners. Domestic consumption, meanwhile, is anchored by three critical demand pillars: automotive, machinery, and construction.

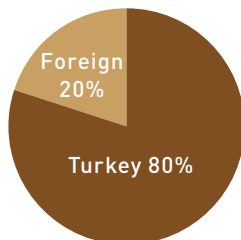
THREE CRITICAL DEMAND PILLARS



The trajectory of the industry is shaped by the balance between industrial upgrading, cyclical demand in Europe, energy and input costs, and Türkiye's push for localization in defense, aerospace, and renewable energy. While commodity fasteners remain important, the competitive landscape is shifting toward higher-margin and higher-performance segments.

Automotive as the Leading Driver

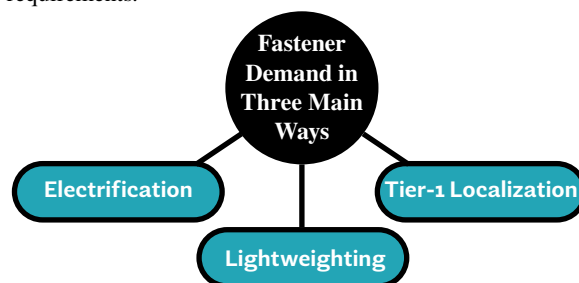
The automotive industry remains the largest single consumer of fasteners in Türkiye. With more than 1.4 million vehicles produced in 2023 and a consistently high export ratio, automotive demand provides both scale and sophistication. Approximately 80 percent of the fasteners used in domestic vehicle assembly are supplied by Turkish manufacturers, demonstrating a deep level of integration into OEM value chains.



Sources of Fasteners
Used in Turkish
Vehicle Assembly

Looking ahead to 2026, the automotive transition will reshape Türkiye's fastener demand in three main ways:

- **Electrification:** Growth in electric vehicle production will require specialized fastening systems for battery housings, lightweight chassis components, and electrical safety-critical parts.
- **Lightweighting:** EU emissions regulations are accelerating the use of advanced materials, increasing demand for high-strength, low-weight fasteners designed for aluminum and composite structures.
- **Tier-1 Localization:** European nearshoring strategies are pushing OEMs to expand local supply bases. This creates new opportunities for Turkish fastener producers, provided they can meet strict European quality and certification requirements.



Machinery and Capital Goods Momentum

Machinery exports reached USD 25.5 billion in 2022, accounting for nearly 10 percent of Türkiye's total exports. Industrial machinery, agricultural equipment, and factory automation systems are all steady consumers of precision bolts, specialty screws, and structural fasteners. **Between 2024 and 2026, growth in machinery output is expected to accelerate on the back of industrial investment and infrastructure projects in Türkiye's domestic market** as well as in Central Asia and the Middle East. This is a segment where Turkish fastener producers can differentiate themselves. Machinery demand often requires medium-volume, customized fasteners with short lead times. Turkish producers, with their geographic advantage and increasing automation, can compete effectively with Asian commodity suppliers by focusing on agility and application-specific solutions.



Construction and Infrastructure

Construction is historically one of Türkiye's most volatile sectors, tied closely to credit availability, government infrastructure budgets, and residential demand. **The 2023 earthquake and subsequent tightening of seismic safety regulations have raised the importance of high-quality anchors, facade systems, and seismic-grade structural fasteners.** Government-led urban renewal and infrastructure investment will continue to drive demand through 2026, particularly for public works projects.

Margins in construction fasteners are generally thinner than in automotive or machinery, but volumes are significant. The key strategic question for producers will be whether to compete on price in bulk structural fasteners or to differentiate through certified, higher-grade solutions that align with evolving building codes.



Emerging Sectors: Defense, Aerospace, and Renewables

Beyond the traditional drivers, emerging sectors are opening new growth avenues. Türkiye's defense industry is undergoing a rapid transformation, with a strategic objective of meeting more than 80 percent of domestic requirements through local sourcing. This includes the fasteners used in armored vehicles, naval platforms, and aerospace systems. Aerospace-grade fasteners are particularly attractive due to their margins, but they require extensive certification and R&D investment. A small but growing number of Turkish manufacturers are positioning themselves to enter this niche.

Renewable energy, especially wind and solar, represents another promising frontier. Wind turbine towers, solar panel mounting systems, and offshore energy structures require specialized fasteners designed for high stress and corrosion resistance. With Türkiye targeting 65 percent renewable electricity generation by 2035, demand for renewable-related fasteners is set to increase steadily.

Trade Dynamics and Competitive Pressures

Türkiye's fastener trade structure reflects both strengths and vulnerabilities. **Imports stand at roughly 95,000 tons annually, while exports reach around 300,000 tons.** The bulk of these exports go to the EU, but diversification toward the Middle East, North Africa, and Sub-Saharan Africa has been accelerating.

The competitive pressure comes from two ends: low-cost Asian imports that dominate commodity categories, and high-spec European suppliers that lead in aerospace and advanced automotive. Turkish manufacturers hold advantages in geographic proximity, customs union access, and flexible production capabilities. However, energy price volatility, currency depreciation, and dependency on imported alloy steels and coatings present ongoing risks.

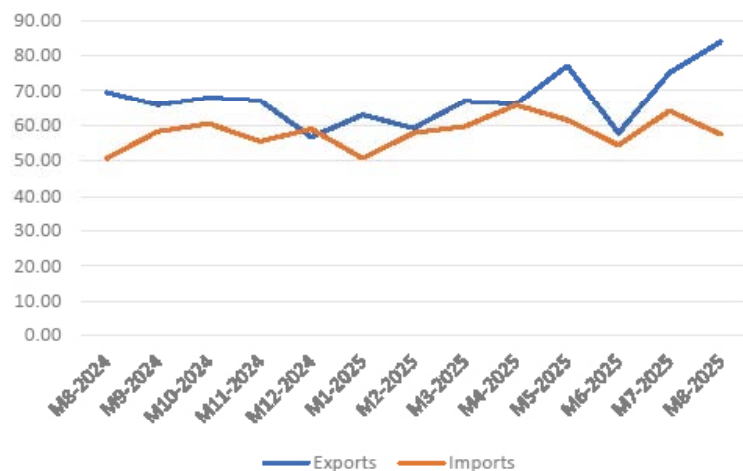
Maintaining growth beyond 2026 will require Turkish producers to prioritize differentiation over scale. Competing purely on price will expose them to greater margin pressure, while investment in higher-value fasteners can secure a more resilient position.

2024-2025 Trade Snapshot

The latest trade cycle highlights Türkiye's strengthening position in the fastener market as it moves toward 2026. As shown in the accompanying chart (Figure 1.), which presents monthly export and import values in million U.S. dollars, both indicators fluctuated over the year, yet exports maintained a clear upward trajectory, widening the trade surplus. This steady divergence reflects growing competitiveness and deeper integration of Turkish producers into European supply chains.

Figure 1. Turkish Fastener Import and Export Trends (Aug. 2024- Aug. 2025)

(Unit: Million USD)



The pattern suggests more than a temporary rebound. Increased export activity aligns with higher order volumes from the automotive and machinery sectors, while stable import levels indicate that domestic manufacturers are capturing a larger share of internal demand. Despite currency pressures and cost fluctuations, Türkiye's fastener exports have shown resilience, supported by technological upgrading and consistent product quality. The 2024–2025 trend therefore reinforces the sector's transition from volume-based growth toward higher value-added specialization, a foundation for sustained momentum entering 2026.

Challenges to 2026

Despite the sector's positive trajectory, several structural and operational pressures could constrain growth if left unaddressed. Most are not new, but their combined impact is expected to intensify between 2024 and 2026 as the industry faces tighter margins, higher certification costs, and volatile macroeconomic conditions. The key challenges include:

- Raw material dependency on imported alloy steels and coating chemicals, leaving producers exposed to exchange rate volatility.
- Energy intensity of heat treatment and plating processes, making costs highly sensitive to fluctuations in electricity and natural gas prices.
- Certification and quality requirements as a barrier to entering aerospace, EV, and renewable energy supply chains.
- Global demand cyclical, especially in the automotive and construction industries, which remain vulnerable to European economic slowdowns.

Strategic Imperatives

For the industry to achieve sustainable growth through 2026 and beyond, several strategic imperatives emerge. First, investments in advanced metallurgy, testing, and certification capacity are essential to unlock premium markets. Second, diversification of export destinations beyond the EU will reduce dependency on a single demand center. Third, automation and digital inspection technologies can help align production with the stringent standards of global OEMs. Fourth, greater localization of raw material inputs will mitigate the risks tied to currency and logistics volatility.

Outlook to 2026 and Beyond

As 2025 draws to a close, Türkiye's fastener industry has maintained a stable recovery trajectory despite exchange-rate volatility and uneven global demand. Export performance remains resilient, sustained by European automotive and machinery demand, while domestic consumption has benefited from renewed industrial investment and infrastructure activity.

In 2026, the sector is expected to sustain moderate expansion, with domestic demand likely to grow by around 3-5 percent and exports by 5-7 percent, provided macroeconomic conditions remain stable. The medium-term outlook to 2030 points to continued capacity growth and gradual product upgrading, potentially taking total national output beyond one million tons within the decade.

The industry's next phase will be defined less by volume and more by capability. Turkish manufacturers are moving toward higher-value segments, specialty, high-strength, and application-specific fasteners, supported by automation, certification, and closer integration with global OEM supply chains. The transition will require sustained investment in technology and process quality, but it positions Türkiye to consolidate its role as the most competitive fastener hub bridging Europe, the Middle East, and Central Asia. ■

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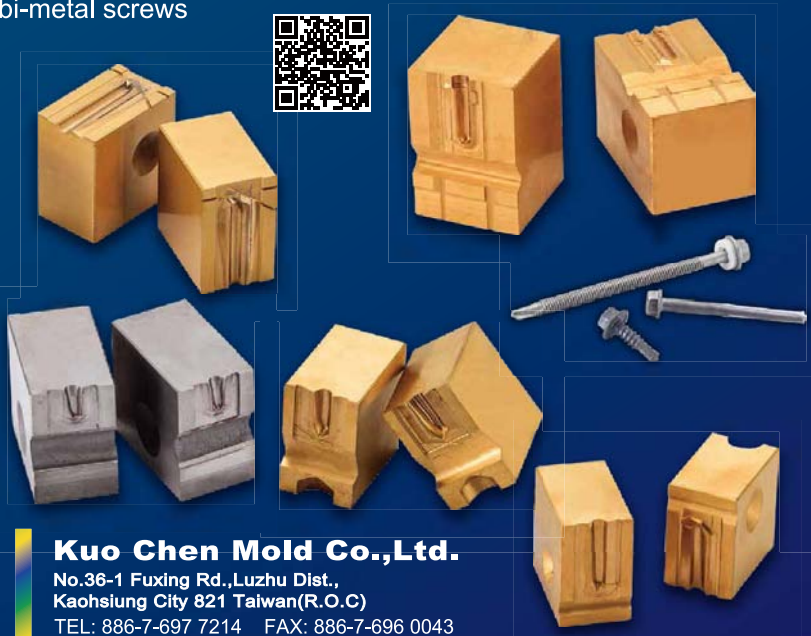


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