

A background image showing several pieces of laboratory glassware, including beakers and Erlenmeyer flasks, arranged in a row. The glassware is dark and reflective, with some showing measurement markings. The lighting is dramatic, highlighting the contours of the glass.

# Chemical sector in Türkiye

July 2025

The chemical sector is one of the major pillars of Türkiye's manufacturing industry. In 2024, it ranks as the country's second-largest export sector, with an estimated export value of USD 30.8 billion, accounting for 13.6% of total exports. With more than 6,200 active companies and nearly 200,000 direct jobs, this sector spans a wide range of activities, from petrochemicals to plastics, as well as paints, fertilizers, technical resins, and specialty chemicals.

Türkiye stands out notably for its strategic position as a regional hub, strengthened by logistical advantages, competitive production costs, and a rapidly modernizing industrial base. Several large-scale industrial projects (Ceyhan petrochemical complex, CHEMPORT cluster) reflect a clear commitment to reducing dependency on imports, particularly for critical raw materials such as polypropylene or carbon black. These substantial investments, often carried out in partnership with international groups, aim to enhance the country's industrial autonomy in strategic sectors such as automotive, packaging, cosmetics, and technical textiles.

Moreover, the sector is undergoing a transformation driven by sustainability requirements, regulatory alignment with the European Union (CLP, CBAM), and the integration of clean technologies. Local initiatives promote innovation, high value-added production, and export to diversified markets, with a presence already established in 231 countries and territories.

In this context, Türkiye represents a market full of opportunities for foreign investors, both in terms of production, technology transfer, and co-development.

# General overview

## KEY FIGURES



**USD 40.5 billion**  
Revenue in 2022



**≈ 200,000**  
Jobs



**> 6,200**  
Active companies



**USD 30.8 billion**  
Export value in 2024



**2<sup>nd</sup>**  
Türkiye's export sector  
(13.6% of total exports)

## RANK



**2<sup>ème</sup>**  
Largest plastic producer in Europe. 7<sup>th</sup> worldwide



**5<sup>th</sup>**  
Largest paint producer in Europe



**10<sup>th</sup>**  
Largest fertilizer consumer in the world

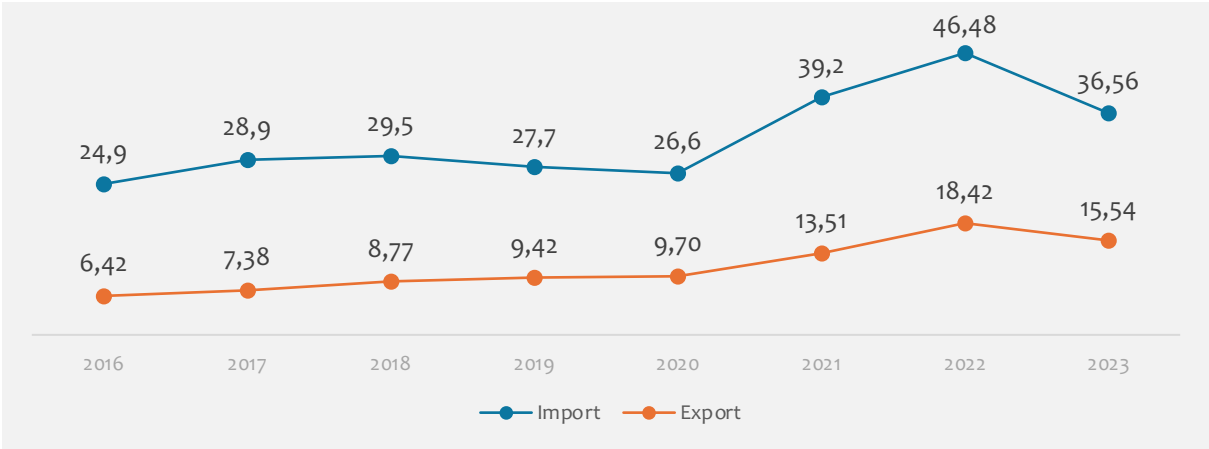


**2<sup>nd</sup>**  
Largest importer of petrochemical products in the world after China



**2<sup>ème</sup>**  
Largest importer of polypropylene in the world after China

## Foreign trade evolution of chemical products in Türkiye, in USD billions



The value of exports and imports varies depending on the sources and subcategories considered.  
In the graph above, the categories included in the calculation are as follows: chemical fertilizers and nitrogen compounds, plastics and rubbers in primary form, pesticides and other agrochemical products, paints, inks and coating materials, cleaning and personal care chemicals, artificial or synthetic fibers, as well as other chemical products.

### Top 3 exported products:

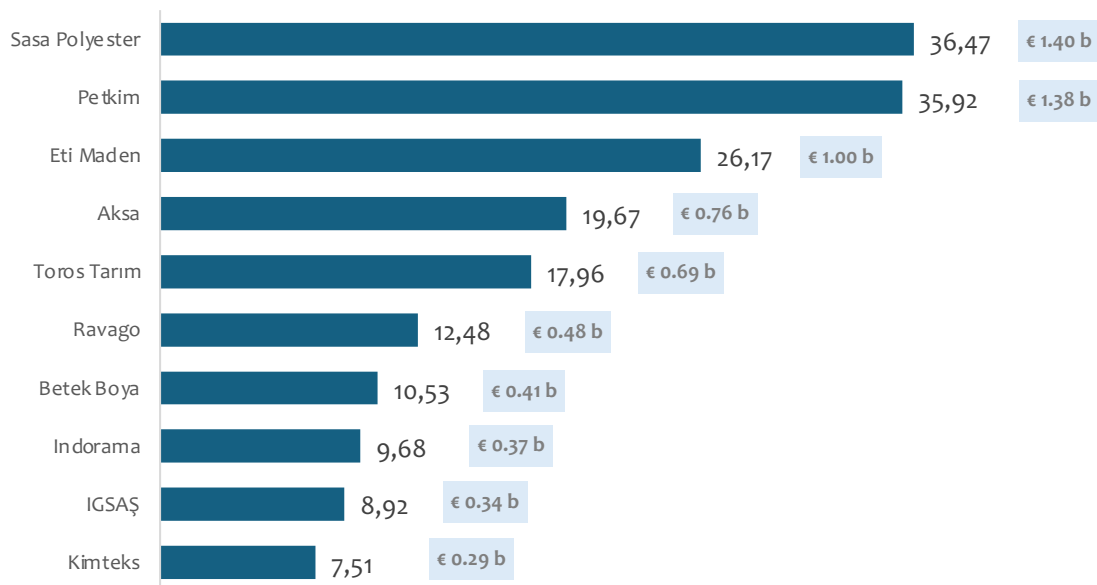
- 1 Mineral fuels, mineral oils, and related products**  
USD 10.1 billion
- 2 Plastic products**  
USD 9.8 billion
- 3 Rubber and rubber articles**  
USD 3.5 billion

### Top 3 imported products:

- 1 Mineral fuels, mineral oils, and related products**  
USD 59.5 billion
- 2 Plastic products**  
USD 15.2 billion
- 3 Organic chemical products**  
USD 8.8 billion

# Major players and a highly competitive landscape

Top 10 major companies active in Türkiye in terms of production-related revenue (billion TL, 2023)



## Major investments made in recent years

**Reducing dependency** on raw material imports (polypropylene, carbon black, resins) through substantial investments..

**Strengthening local capacities** in strategic segments (plastics, construction, carbon black).

**Influx of foreign investments** boosting technological competitiveness and export potential.

**Consolidation of Türkiye's sector** with major local players investing heavily to diversify their production.



Investing USD 2 billion to build a petrochemical plant in Ceyhan (Adana) in partnership with Sonatrach (Algeria)



Doubling its production capacity of water-soluble acrylic acid-based dispersants at its Dilovası plant.



Investing USD 1.9 billion to build a propane dehydrogenation and polypropylene production plant in Hatay.



Investing USD 100 million in a resin/epoxy plant.



Investing in the construction of a carbon black production plant in İskenderun.



Carrying out a series of acquisitions in Türkiye: Tara Kimya, 2007; Ekin Kimya, 2019; Tunçkaya, 2022; Oktrade, 2023



Acquires the Turkish company Kale Kimya, a distributor of specialty chemicals.



Acquires 51% of the Turkish company MBT Teknik, specialized in construction chemicals.

# Zoom on two ambitious large-scale projects

## CEYHAN PETROCHEMICAL COMPLEX

Rönesans Holding is leading one of the largest industrial projects ever undertaken by the private sector in Türkiye: the construction of a **polypropylene (PP) production plant** and a **storage terminal** in Ceyhan, within the DAPEK industrial zone.

This strategic project aims to strengthen Türkiye's **industrial autonomy** in key sectors such as automotive, plastics, packaging, and textiles. It will also help reduce the country's trade deficit by approximately USD 300 million per year while laying the foundation for a true **regional petrochemical hub**.

The project is expected to have a significant social impact, creating up to 4,500 jobs during the construction phase and around 300 direct jobs once the plant is operational. In parallel, local training programs have been established, including the creation of a welding school, to develop technical skills in the region and support long-term employability.

### Investment amount

- **USD 2 billion**
- USD 1.3 billion secured through international financing (notably from DFC – USA, Cesce – Spain, ING, BBVA, DZ Bank, etc.)

### Key partners

- Sonatrach (Algeria): co-investor and raw material supplier
- Stolthaven Terminals (Stolt-Nielsen, Norway): partner for the logistics terminal

### Technical specifications:

- **Production capacity:** 472,500 tonnes of PP per year
- **Will meet 17% of national demand** (Türkiye consumes ≈2.7 million t/year, with only ≈100,000 tonnes produced locally)
- **Terminal designed** to serve both the plant and local/international third-party customers
- **Integration of advanced environmental technologies** (100% renewable electricity, low emissions)



## CHEMPORT PROJECT

The **CHEMPORT** project, located between Biga and Bandırma (Western Türkiye), aims to create an industrial cluster dedicated to the local production of high value-added chemical products. The goal is to reduce dependency on imports and Türkiye's trade deficit in this sector (estimated at **USD 25 billion** excluding fuels). The main objective is to meet strong domestic demand for chemical raw materials by producing at least half of the imported products locally.

Supported by the **Ministry of Industry**, the project plans to host around **twenty companies** on 15,000 hectares (expandable to 30,000) and develop modern infrastructure, including a port, to foster job creation and regional development.

### Investment amount

- **EUR 5 billion**
- EUR 3 billion for heavy infrastructure (construction of the port, quays, water networks, energy, electricity, roads, etc.).
- EUR 2 billion for specific industrial infrastructure (factory superstructures and equipment).

### Technical specifications:

- **Area:** 30,000 hectares identified, with operational launch planned on 15,000 hectares
- **Construction of a maritime port** adapted for the safe handling of chemical products
- **Energy (electricity, gas), water, and logistics infrastructure** (railways, roads)
- **Pipeline system** interconnecting production units
- **Land allocation** on a 30-year lease basis at a fixed price per m<sup>2</sup>
- **Company selection** based on strict criteria: production of high value-added inputs, exports with a unit price above USD 3/kg



# Strengths of the Turkish market



## Competitive export advantage

The depreciation of the Turkish lira has strengthened Türkiye's position in production and exports, thanks to relatively lower costs, particularly in labor and energy.



## Logistical proximity

Amid rising average freight costs due to container and labor shortages, Türkiye has leveraged its geographical position between Europe and Asia, establishing itself as a strategic logistics hub for exports and imports.



## Investment & innovation

Several Turkish players have undertaken significant initiatives in innovation, capacity expansion, acquisitions, and IPOs, while foreign companies have continued their investments in Türkiye.



## Favorable regulation

Programs such as the Chemistry Technology Center and the Technology-Oriented Industry initiative aim to support and accelerate the development of Türkiye's chemical industry.

# Needs & opportunities



## Insufficient petrochemical capacity

- Türkiye is the world's second-largest importer of polypropylene after China. Both local and foreign players are planning petrochemical complex projects. This creates opportunities for foreign investors with technology or capital to engage in co-investments or industrial partnerships.



## Green transition and decarbonization

- Under pressure from European regulations (e.g., CBAM), Türkiye's chemical value chain is undergoing a shift toward green chemistry processes and a significant reduction of its carbon footprint.
- Innovations in electrolysis and clean technologies are being developed to meet this global trend.



## Regulatory modernization and institutional support

- Alignment with the EU CLP regulation since 2020.
- Tax incentives, customs exemptions, and interest subsidies are in place to support industrial and R&D investments.



## Export and sectoral diversification

- Türkiye's chemical industry exports to **231 countries and territories**.
- Expansion is primarily driven by plastic products, technical plastics, mineral products, cosmetics, and pharmaceuticals.
- Foreign investors can target high value-added niches (pharma, bioplastics, specialties).

## Next fairs in Türkiye :



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