Defence industry in Türkiye

November 2025

Equipped with the second-largest army in NATO in terms of personnel, after the United States, and holding a key geostrategic position between Europe, the Middle East, and the Black Sea, Türkiye plays a central role in regional and Euro-Atlantic security. With an overall defence budget exceeding € 30 billion in 2025, the country ranks as the 11th largest arms exporter worldwide, confirming its status as a major strategic actor on the international stage.

The Turkish defence market is experiencing rapid expansion, driven by a strong desire for national sovereignty. In 2024, the market size is estimated at $ 21.45 billion and is expected to reach $ 58.88 billion by 2035, representing a compound annual growth rate (CAGR) of 9.61% over the 2025–2035 period.

This momentum reflects Ankara's strategy of technological independence, aimed at reducing dependency on foreign suppliers while consolidating a robust defence industrial and technological base. Progress in armed drones (Bayraktar's TB2, TB3, Akıncı and Kızılelma, TAI's Anka-III…), tanks and armored vehicles (Altay, Arma, Kaplan…), and naval platforms (MİLGEM corvettes and frigates, Reis-class submarines) illustrate this steady rise in capability. Thanks to these programs, Türkiye has now emerged as one of the leading exporters of military equipment in the Middle East.

To accelerate this transformation, Ankara has created a defence Industry Support Fund, financed by public and private contributions and reaching nearly € 7 billion in 2025. This mechanism aims to strengthen national competitiveness and supports the development of strategic projects such as the KAAN 5th generation fighter, hypersonic missiles, and electronic warfare technologies.

Finally, although Türkiye is making major progress toward full autonomy, the sector still relies heavily on international partnerships. The country actively cooperates with several European, Asian, and American powers on co-development, technology transfer, and supply-chain diversification, further solidifying its position among the major emerging players in global defence.

Document prepared using data from 2023, and 2024.
IMPORTANT: The information and figures contained in this note are sourced from research conducted using various reliable and publicly available sources (newspaper articles, specialized press, sector reports, etc.). The data presented in this note in no way commit Advantis Conseils Türkiye to any responsibility in the event that this information is incomplete or inaccurate.

General overview

KEY FIGURES (2024)

€ 24 billion
Allocated budget
€ 30 billion in 2025

$ 15 billion
Industry turnover

$ 7.1 billion
Export value

$ 2.6 billion
Value of R&D expenditure

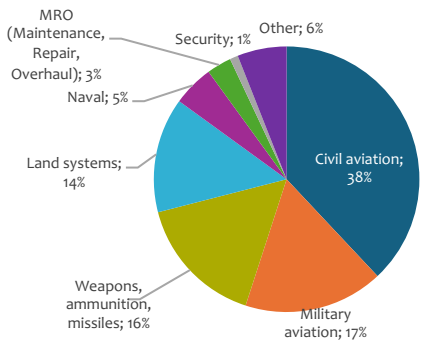
> 90,000
Jobs

> 3,500
Active companies

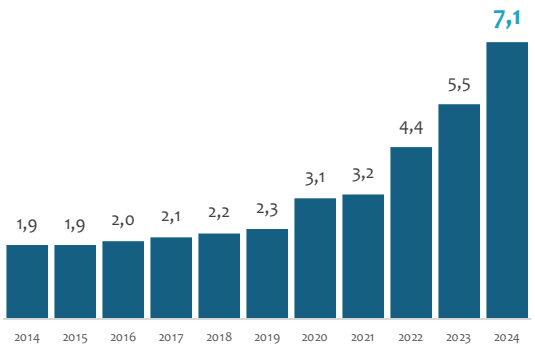
> 1,400
Number of on-going projects

> $ 100 million
Value of these projects

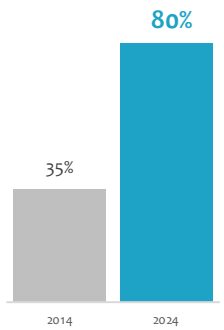
Breakdown of turnover by segment (2023)



Export evolution (billion $)

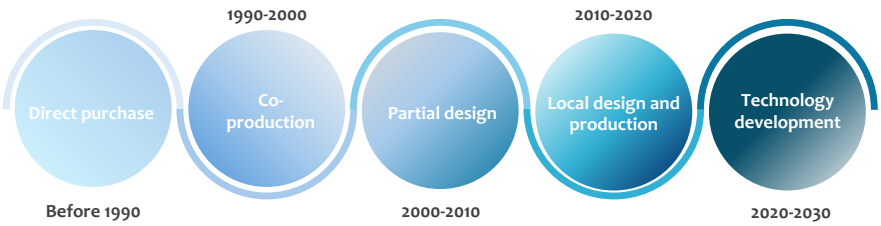


Local demand satisfaction rate



INDUSTRY EVOLUTION

The Turkish defence industry has undergone a profound transformation, shifting from a model focused on equipment acquisition to one centered on design and production.



TECHNOLOGIES UNDER DEVELOPMENT

LAND	NAVAL	AERIAL	SPACE	CYBER
Unmanned ground vehicles	Air defence frigate	High-speed drones	National communication satellites	National search engine
Weapon systems / Guided munitions	Unmanned naval vehicles	New heavy and light attach helicopters	Air defence systems	Cyber macro ecosystem
Main battle tank	National submarine	Long-range cruise missiles	Satellite launch systems	Cyber army
Robot soldiers	National aircraft carrier	National new generation fighter jet	Liquid and solid fuel rockets	Cyber academy
Internal combustion propulsion systems	National torpedoes	Gaz turbine propulsion systems	Hybrid fuel rockets	
Hybrid propulsion systems		Surface-to-air and missile defence systems		

Türkiye has undertaken significant projects to strengthen its military capabilities

LAND PROJECTS

UNMANNED GROUND VEHICLE BARKAN

HAVELSAN

The **BARKAN** vehicle is a medium-class UGV (Unmanned Ground Vehicle), classified as "Level 1" autonomous. It entered service with the Turkish Land Forces in 2023. In 2025, a decision was made to start its mass production following operational feedback.

UNMANNED GROUND VEHICLE O-UGV

aselsan KATMERCİLER

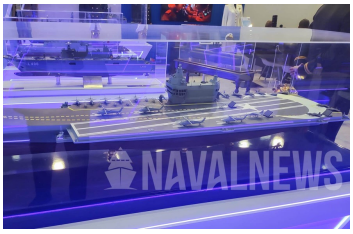
At IDEF 2025, Katmerciler presented a vehicle called the **"Medium-Class Level 2 Unmanned Ground Vehicle (O-UGV 2)."** It is equipped with an ASELSAN SARP remote-operated turret, a satellite communication system, day/night sensors, and can be remotely controlled up to 5 km.

It is a smaller/lighter system than some heavy UGVs, which could be suitable for reconnaissance missions, rapid deployment, or operations in urban/constrained environments.

NAVAL PROJECTS

Türkiye will build the largest warship of any Mediterranean country, surpassing the Charles de Gaulle aircraft carrier. This extraordinary project, named **MUGEM**, will be able to accommodate around fifty aircraft and drones. The stated objective is to achieve a high level of local involvement in design and production.

MUGEM AIRCRAFT CARRIER *(ON-GOING)*



Specifications :

- **Length :** ≈ 285 meters
- **Width (stern/beam) :** ≈ 72 meters
- **Estimated displacement :** ≈ 60,000 tonnes
- **Maximum speed :** over ~25 knots
- **Flight deck and air operations :**
  - Initially developed in a **STOBAR** configuration *(Short Take-Off But Arrested Recovery)*
  - **Three runways planned**: two for take-off, one for landing
  - Eventually, an evolution to a **CATOBAR** configuration (catapults + arresting gear) could be considered
- **Air capacity**: up to ≈ 50 aircraft (manned or unmanned) are planned (~20 on deck + ~30 in the hangar)
- **Self-defence and armament :**
  - Vertical Launch System (VLS): "MIDLAS"
  - Short-range defence systems: CIWS type ("Gökdeniz") and 25 mm Aselsan gun

AVIATION PROJECTS

BAYRAKTAR TB-2 DRONE TÜRKIYE'S TECHNOLOGICAL PRIDE

BAYKAR

The **Bayraktar TB2**, developed by Baykar, is one of the most famous and widely exported drones in the world. Used in operational theaters such as Libya, Syria, Nagorno-Karabakh, and Ukraine, it has proven its effectiveness through its surveillance and precision strike capabilities.

TF-X KAAN FIGHTER JET *(ON-GOING)*

TURKISH AEROSPACE

The **TF-X KAAN fighter jet** is a stealth aircraft designed to gradually replace F-16s in the Turkish fleet. Equipped with advanced technology, the TFX will focus on stealth, intelligent weapons systems, and enhanced integration with modern defence networks. The prototype has recently reached key milestones, with entry into service announced in the coming years.

OTHER AIRCRAFT *"MADE IN TÜRKIYE"*

KARAYEL DRONE

ATAK HELICOPTER

TRAINING PLANE HÜRKÜŞ

AKSUNGUR DRONE

Focus on the “Iron Dome” project

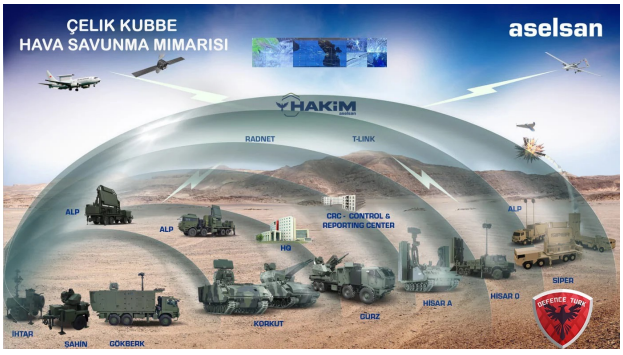
The “**Iron Dome**” project (***Çelik Kubbe***) aims to network, both at sea and on land, multilayer air defence systems, sensors, and other weapon systems. It is a true “system of systems” designed to develop and transmit in real time a common general air picture (Recognized Air Picture, RAP) to operations centres and decision-makers, refined through the use of artificial intelligence.

The “Iron Dome” will take into account existing air security measures, particularly in Ankara and over the Bosphorus and Dardanelles straits and address new needs such as the protection of the Akkuyu nuclear power plant.

Project led by the Presidency of the defence Industry of Türkiye (*Savunma Sanayii Başkanlığı*)

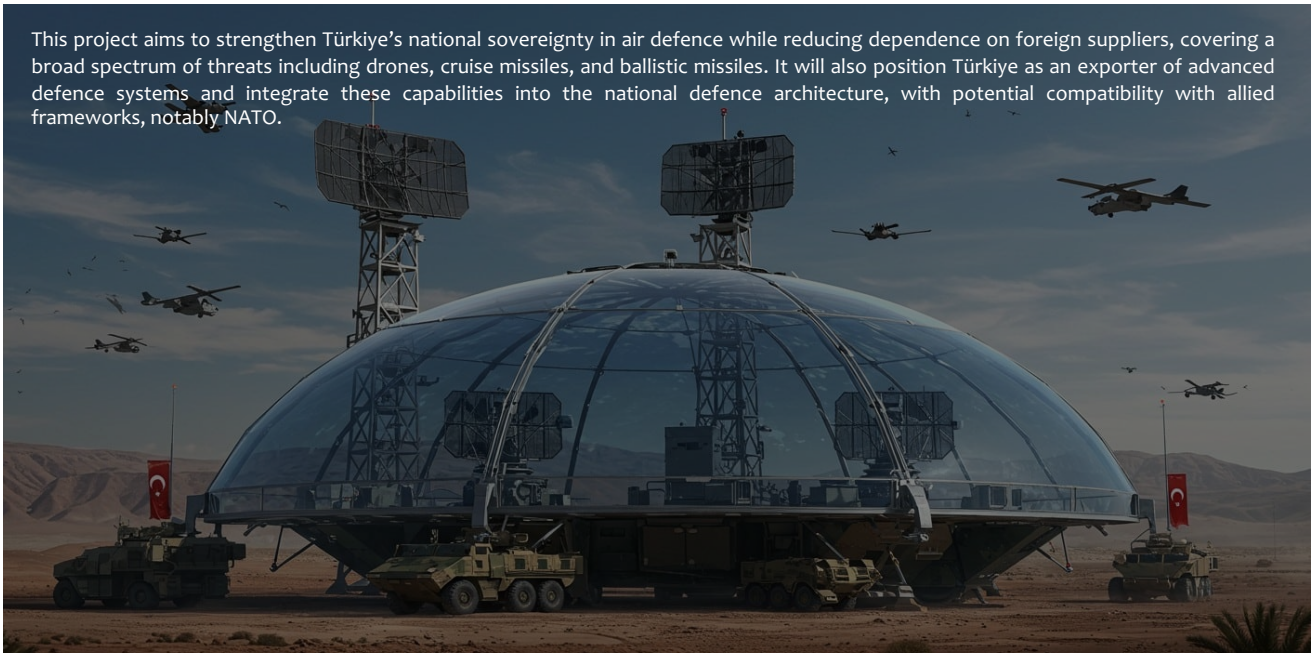
Key Turkish industrial players aselsan roketsan MKE TÜBİTAK SAGE

The architecture and main outlines were approved in August 2024. The project is scheduled to become operational around 2028.



Key features

- **Multilayer coverage:** very low altitude (drones, rockets), low/medium altitude (aircraft, cruise missiles), high altitude/long range (ballistic or cruise missiles).
- **Integration of domestic systems:** HİSAR missile systems (short/medium range), SİPER (long range), radars, electronic warfare.
- **Command and control (C2) network:** software and hardware architecture enabling a common air picture and coordination of fire across different layers.
- **AI and digital support:** decision-making assisted by artificial intelligence, data processing, connected sensors.

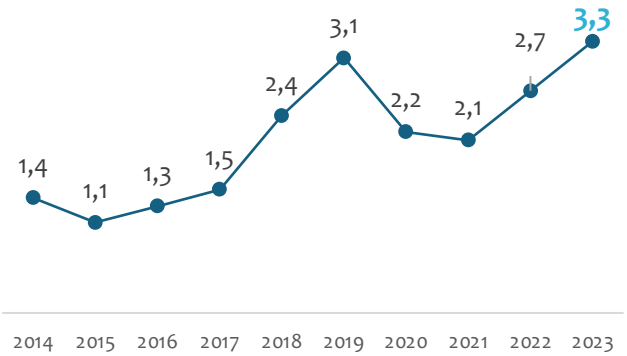


This project aims to strengthen Türkiye’s national sovereignty in air defence while reducing dependence on foreign suppliers, covering a broad spectrum of threats including drones, cruise missiles, and ballistic missiles. It will also position Türkiye as an exporter of advanced defence systems and integrate these capabilities into the national defence architecture, with potential compatibility with allied frameworks, notably NATO.

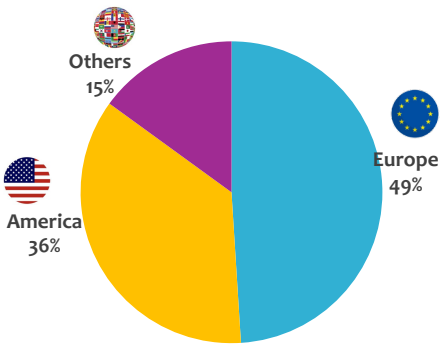
Türkiye remains dependent on foreign expertise

Imports, which rose from $ 2.7 billion in 2022 to $ 3.303 billion in 2023, recorded an increase of 22.35%. Over the past decade, they have nearly doubled up 136%. By geographic region, half of Türkiye's imports come from Europe, up 23.11% year-on-year. Imports from the Americas account for 36% (+22.95%), while other countries contribute 15% (+18.42%).

Import evolution (billion $)



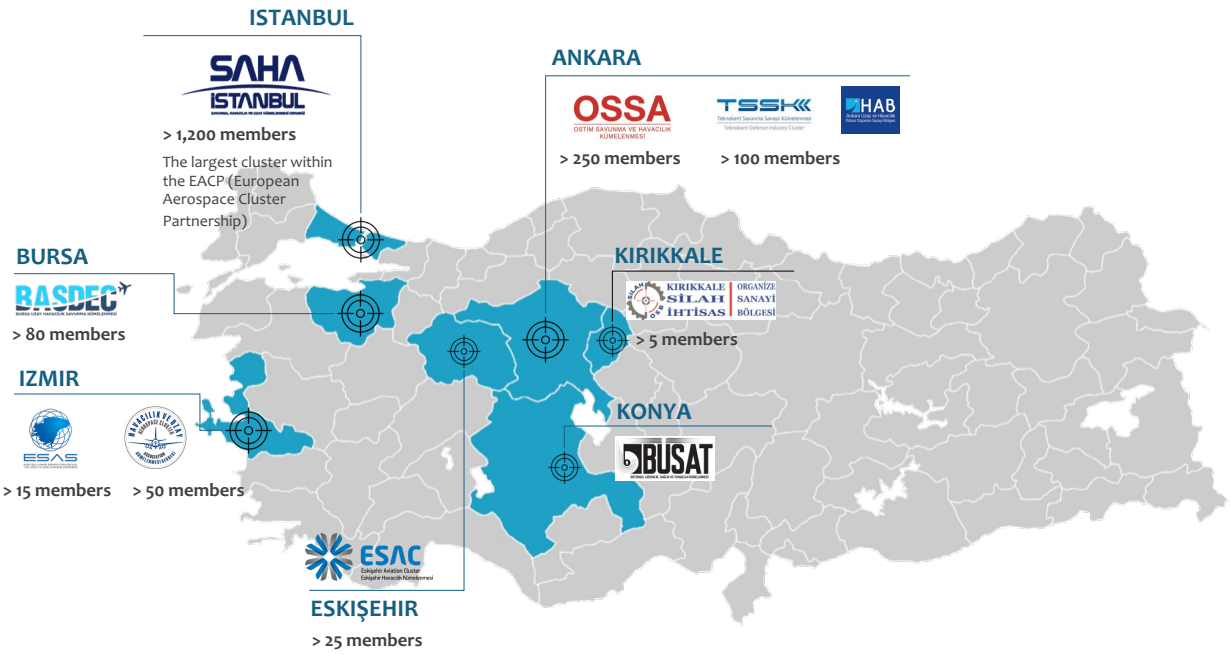
Breakdown of imports by region



Türkiye's major needs

LAND	NAVAL	AERIAL	SPACE	CYBER
Engines, transmissions, advanced armor	Integrated naval combat systems	Next-generation fighter jets	Communication and Earth observation satellites	Security of military and government networks, protection against intrusions, malware, and cyber sabotage.
Surface-to-surface and anti-tank defence systems	Advanced maritime sensors	High-performance engines for fighter jets, propulsion systems, aircraft turbines	Launch vehicles, ground infrastructures, propulsion systems	
All-terrain mobility and logistics systems	Missile systems, anti-submarine warfare, anti-surface and anti-aircraft defence	Transport or attack helicopters	Navigation, geolocation, and national positioning systems	Electronic warfare systems: jamming, electronic reconnaissance
Tactical command, control, communications, and intelligence (C3I)	Naval drones and unmanned/underwater warfare systems	Training infrastructures, avionics maintenance systems, critical spare parts	Critical space technologies: space-grade microelectronics, lightweight materials, high-performance optical sensors	AI/machine learning for surveillance data analysis and threat prediction
Active and passive protection systems for armored vehicles	Naval electronic warfare modules, detection and jamming systems, protection against naval mines.	Strategic airlift and aerial refueling capability	Geospatial services: imaging, mapping, big data, AI	Communications security
Even though Türkiye develops some domestic systems, critical components (e.g., microelectronics, engines, special armor) are still imported	Some subsystems remain dependent on foreign suppliers. Türkiye's geographic position (Mediterranean, Black Sea, Aegean Sea) requires a modern fleet, creating a need for technology transfers and cooperation.	Local development is making progress, but it still requires foreign expertise (engines, radars, advanced avionics). Foreign companies can offer ready-to-use solutions or co-development / technology transfer opportunities.	Türkiye aims to increase its independence in space. The space sector is heavily dependent on foreign technologies. Companies can offer ready-to-launch satellites, components, or imaging and analysis services.	The cyber and electronic warfare domain is often under-resourced even in advanced countries; Türkiye in particular cites gaps in its sophisticated systems. With the rise of hybrid threats and "non-conventional" conflicts, this domain will become increasingly prioritized.

A rapidly growing, technology-driven ecosystem



Five Turkish defence companies are among the world's top 100 in 2025

43e	47e	71e	78e	80e
aselsan	TURKISH AEROSPACE	roketsan	ASFAT	MKE
Valued at $ 3,54 billion	Valued at $ 3,15 billion	Valued at $ 1,55 billion	Valued at $ 1,23 billion	Valued at $ 1,21 billion

List of the largest Turkish defence companies by activity

Land systems & armored vehicles	Otokar, FNSS, BMC, nurol MAKİNA VE SANAYİ A.Ş.	*Design and production of wheeled or tracked armored vehicles, troop transport vehicles, light tanks, and tactical vehicles.*
Aeronautics & manned aircraft (planes, helicopters)	TURKISH AEROSPACE, TEI, Kale Aero, ALP AVIATION	*Development of aircraft, helicopters, aerostructures, engines, and avionics systems.*
Unmanned aerial systems (drones)	BAYKAR, VESTEL Savunma Sanayi	*Design, production, and integration of military drones (reconnaissance and combat).*
Naval systems (surface, submarines, drones)	STM, ASFAT, RMK MARINE, DEARSAN SHIPYARD, SEDEF SHIPYARD	*Design, construction, and modernization of surface ships and submarines, including integration of naval systems.*
Missiles, rockets and munitions	roketsan, MKE, REPKON DEFENCE, ALTAY DEFENCE & INDUSTRY	*Development and production of missiles, rockets, guided munitions, and explosive warheads.*
Electronics, radars, electronic warfare, C4ISR	aselsan, METEKSAN SAVUNMA, MilSOFT, SDT	*Development of radars, communication systems, electronic warfare, command and control, cybersecurity, and embedded software.*
Software, simulation & cybersecurity	HAVELSAN, simsoft, NERA INDUSTRIES Advanced Reliability, YALTES	*Military software, simulation systems, virtual training, artificial intelligence, and cybersecurity solutions.*

Tailor-made support and customized approach par Advantis

The defence sector is highly regulated. It requires support from a local expert well connected within the ecosystem.
Projects in the defence, security, and nuclear domains are managed by **Patrice MOYEUVRE**, Director of defence and Security, and **Ilker ONUR**, Executive Director.

Patrice MOYEUVRE

Director of defence, Security & Nuclear Projects - Advantis Conseils Turquie

Retired General Officer (2nd section) of the French Air and Space Force
Researcher at IRIS

With a long military career in the French Air and Space Force, which he left as a general officer, Patrice MOYEUVRE held senior operational and decision-making positions in joint and multinational environments.

A specialist on Türkiye, he was twice assigned to diplomatic posts as a defence attaché at the French Embassy in Ankara, where he was responsible for security and defence matters as well as Franco-Turkish bilateral relations.

Patrice MOYEUVRE holds degrees from the National Institute for Advanced Studies in Security and Justice, the NATO Defence College, and the French War School. He is a former student of the National Institute of Oriental Languages and Civilizations (INALCO) in Paris and Ankara University. He speaks fluent Turkish.

Ilker ONUR

Executive Director - Advantis Conseils Turquie

Türkiye correspondent for Medef International
Co-founder of the Globallians network

French-Turkish, founder of Advantis in 2003, Ilker ONUR has supported over 550 companies in their commercial and industrial development in Türkiye, ranging from international groups to family-owned SMEs, across diverse fields of expertise.

Ilker ONUR began his career at PPR and later held positions as Purchasing Director and Marketing & Sales Director at major groups such as Carrefour Türkiye and TeknoSA.

With over 25 years of operational experience in Türkiye, Ilker ONUR is accredited as a "Türkiye Expert Consultant" by Stratégie and has expertise in strategic analysis and consulting, negotiation, management of M&A operations and industrial setup, as well as subsidiary management.

Next fairs

5-9 May 2026 — SAHA EXPO

10-12 September 2026 — ISTANBUL AIRSHOW

14-16 October 2026 — IDA Türkiye