

MILITARY

GLOBAL DEFENSE MARKET PROFILES

Market Profile Turkey

Aviation Week Network

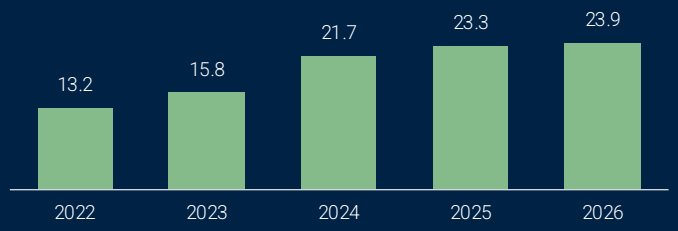
Defense Market Analyzer

March 2026

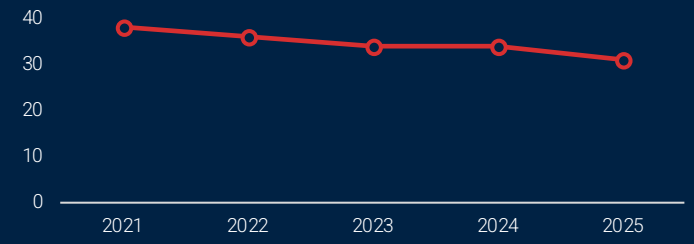
AVIATION WEEK by informa

Key Metrics

DEFENSE SPEND, US$b Real



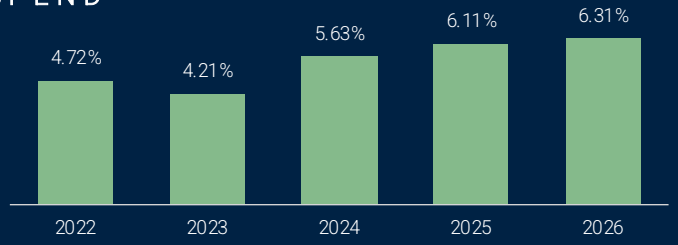
CORRUPTION SCORE



TOTAL VALUE CONTRACTS 2025

US$9.9b

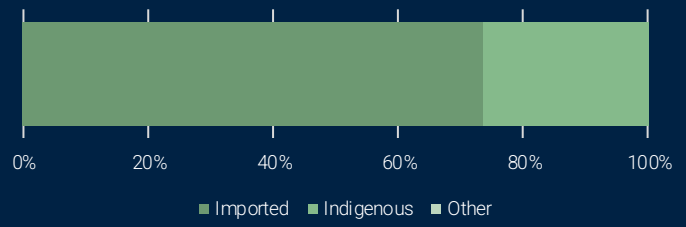
DEFENSE SPEND % GOVERNMENT SPEND



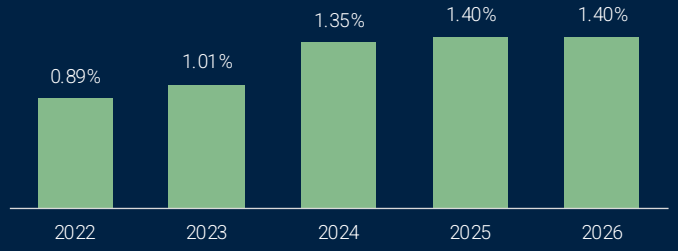
GLOBAL FREEDOM SCORE



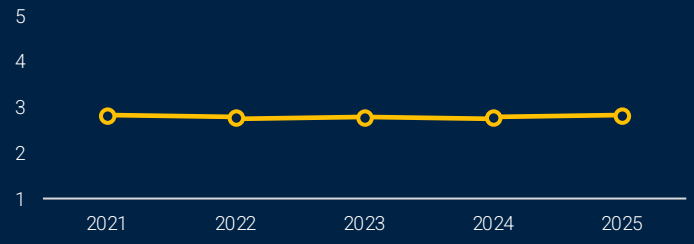
DOMESTIC VS IMPORTS 2025



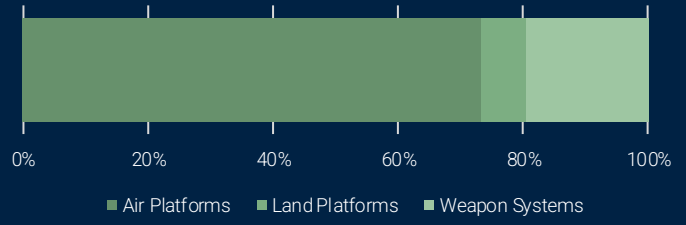
DEFENSE SPEND % GDP



GLOBAL PEACE INDEX



TOTAL CONTRACTS BY MARKET SEGMENT 2025



Sources: Aviation Week Defense Market Analyzer, Transparency International, Freedom House, Institute for Economics and Peace

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01 POLITICAL ENVIRONMENT

Political Summary

Western countries are concerned that Turkey is becoming more authoritarian under Erdoğan.

SYSTEM OF GOVERNMENT

Presidential Republic

PARTY IN POWER

Justice and Development Party (AKP)

POLITICAL POSITION

Left — Centre — Right

DEFENSE PRIORITISATION

Low — Medium — High

NEXT GENERAL ELECTION

No later than May 2028

Sources: Carnegie Endowment, CIA World Fact Book, CRS, FOI, Freedom House, IISS, IRIS, UK House of Commons Library

Turkey has **transitioned from a parliamentary to a presidential republic** after 51.4% of the population voted in favor of changing the 95-year-old system of government during a referendum held in April 2017.

The government is led by a **directly-elected president** who can serve for a maximum of two five-year terms, although an incomplete term does not count towards the limit. The president **appoints a council of ministers** to run the government, acts as the **commander-in-chief of the military**, and exercises considerable **authority over government policy**, including defense and foreign affairs. After the 2017 referendum, **the president has accumulated more executive powers**, including the ability to issue legislative decrees without parliamentary oversight and to dissolve parliament.

The legislature is formed of a unicameral parliament known as the **Grand Assembly of Turkey**. This contains 600 seats, with members elected to serve five-year terms via proportional representation. These members have various responsibilities, including enacting and amending **legislation**, debating **budgetary bills**, and **ratifying international treaties**.

Following a general election held in May 2023, **Recep Tayyip Erdoğan** was elected as president for a second term. Erdoğan's **right-wing Justice and Development Party (AKP)** and its partners in the **National Alliance coalition** also won a majority in the Grand Assembly, winning 49.9% of the vote.

According to Freedom House, Turkey has become a **more authoritarian country** under Erdoğan's leadership. It notes that officials from the main opposition party, the **Republican People's Party (CHP)**, have been dismissed and arrested on politically motivated charges. This includes **Ekrem Imamoğlu**, who was mayor of Istanbul and was expected to be the CHP's candidate in the next presidential election. The Council of Europe has also warned that there are **insufficient checks and balances** on the President's power.

Historically, the Turkish government has been vulnerable to **military coups**. After a 2016 coup attempt, Erdogan purged many civil servants and officers in the armed forces, raising fears about **a slide towards authoritarian rule**.



President
Recep Tayyip Erdoğan



Minister of Defense
Yaşar Güler

Election Timeline & Key Parties

Turkish local elections held in March 2024 saw the CHP opposition outperform Erdoğan's AKP, but the next general election is not scheduled to be held until 2028.

Republican People's Party (CHP)
Led By: Özgür Özel

STATUS Opposition
POSITION Center-Left

The centre-left CHP is the **second-largest party** in the Turkish parliament, with 130 seats compared to the AKP's 268. It has also enjoyed **several successes in Turkish local elections**, having won the mayoral elections in Ankara and Istanbul during the 2019 local elections and having **outpolled the AKP during the March 2024 local elections**.

The CHP is a **secular, social-democratic party** that wants to pursue **EU membership** and maintain Turkey's position in **NATO**. During the 2023 general election, it joined the National Alliance coalition that **campaigned for Turkey to return to a parliamentary republic** and for legislation to be introduced that would uphold the rule of law, free and fair democratic elections, and human rights.

While the CHP supports armed suppression of the Kurdistan Workers' Party (PKK) militant organization, it has **advocated for more lenient treatment of Kurdish political activists**. Despite being a secular party, it has also advocated for the protection of religious freedoms.

Justice and Development Party (AKP)
Led By: Recep Tayyip Erdoğan

STATUS Government
POSITION Right

The right-wing AKP has **governed Turkey since 2002**. It is led by **Erdoğan**, who served in the now abolished post of prime minister from 2003 until becoming president in 2014. Since the 2023 general election, he has led a minority coalition government known as the **People's Alliance**. Now in his final term, **it is unclear whether Erdoğan will follow through on his decision to retire from politics by the 2028 general election** or whether he will seek to remain in power by amending the constitution or calling for an early election.

Initially, the AKP focused on securing **EU membership** for Turkey, with **accession talks starting in 2005**. However, tensions with other EU members over Turkey's foreign policy and fears that its government was becoming more authoritarian led the EU Council to declare that **accession talks had been frozen in 2018**.

In response, the AKP has pushed a **nationalist agenda and a more assertive foreign policy**. Unlike its secular opposition parties, it has also been **willing to introduce Islamist reforms**, such as relaxing restrictions on the wearing of religious dress.

Nationalist Movement Party (MHP)
Led By: Devlet Bahçeli

STATUS Government
POSITION Far-Right

The far-right MHP is a junior partner in Erdoğan's **People's Alliance** minority coalition government. It controls **46 seats** in the Grand Assembly compared to the AKP's 275.

The MHP has a **nationalist agenda** based on an ethnic understanding of Turkish identity. Historically, it has been associated with violent paramilitary organizations such as its **Grey Wolves** youth wing.

Reflecting its desire for a united Turkish state, it has been opposed to working with the Kurdish **People's Democratic Party (HDP)** and to **negotiations with the PKK** militant organization. However, in early 2025 MHP leader Devlet Bahçeli initiated negotiations with the PKK's imprisoned leader **Abdullah Öcalan**. This resulted in the PKK announcing that it would disband itself in May 2025.

The MHP has typically supported its AKP coalition partner by **providing votes on contentious issues** such as the repeal of the headscarf ban. However, Bahçeli has stated the CHP's **Ekrem Imamoğlu** should be released from custody if the government cannot prove any wrongdoing.

Sources: Carnegie Endowment, Chatham House, CSIS, EU Council, IFRI Studies, IRIS, MEI, UK House of Commons Library

Political Importance of Defense

The Turkish government's prioritization of defense is broadly supported by the public and the mainstream opposition parties, though the public is growing increasingly dissatisfied with the Turkish economy.

		LOW	MEDIUM	HIGH
POPULATION	Public polling in Turkey has consistently demonstrated a **high level of public trust in the Turkish Armed Forces**, with a Pew Research poll conducted in March 2024 showing that **62% of the public thought it had a positive influence on society**. But with only 43% of Turks stating a positive view of Erdogan in March 2024 and **growing frustration with Turkey's economy**, the public may become less willing to accept the costs of this defense policy by the time of the next election.		● ● ● ● ○	
CURRENT GOVERNMENT	With Erdoğan's government seeking to **enhance Turkey's global status and increase its strategic autonomy,** defense matters are of high political importance. **Championing Turkish defense industrial achievements** and achieving success in unilateral military operations also appeal to the Turkish public, encouraging the government to focus its resources on defense. Turkey's defense industrial development has also created **export opportunities**, which have in turn served to **increase its global influence**.		● ● ● ● ●	
OPPOSITION VIEWS	There are **minimal divergences** between the AKP and the CHP (Turkey's primary opposition party) over foreign policy. Most of the contention is focused on domestic politics, although the CHP's desire to **reintroduce democratic protections** would align Turkey more closely to **EU and Western values**. Nevertheless, the CHP did oppose Turkish deployments to Libya and Syria, indicating that the opposition would prefer a **more restrained foreign policy** that may place less emphasis on defense.		● ● ● ● ○	

Sources: Aviation Week Defense Market Analyzer, Carnegie Endowment, MEI, Pew Research

Defense & Foreign Policy

In line with his desire to increase Turkey's global influence and its freedom to pursue an independent foreign policy, Erdoğan has tried to reduce Turkey's reliance on NATO and the US.

Introduction

Turkey has not published a publicly available defense and foreign policy document since the 1990s. However, it is understood that the presidency and the **Ministry of National Defense (MSB)** devise a **National Security Policy Document (MGSB)** known as the 'Red Book' every five years, most recently in January 2025. This explains the country's defense strategy and informs a **National Military Strategy of Turkey (TUMAS)** that outlines Turkey's strategic plans and its primary threats. Both documents are **classified**.

This means that Turkey's defense and foreign policy must be inferred from official statements given by government institutions such as the **Ministry of Foreign Affairs** and President Erdoğan, as well as analysis of its actions.

"Turkey doesn't have to choose between Russia or any others"

The 'Century of Turkey'

During the celebrations commemorating the centenary of the establishment of the Turkish republic in 2023, Erdoğan pronounced that the following hundred years would be the **'century of Turkey'**. This reflects his aspirations for Turkey to **increase its global influence** and exploit its **strategic position** at the juncture between Europe, Asia, and Africa to become a **logistical superpower by 2053**.

In line with this vision, Erdoğan has fostered closer links with countries in Africa, the Caucasus, Eastern Europe and the Balkans, and the Middle East. This has involved **trying to join non-Western multinational organisations** with greater appeal among countries of the 'Global South' such as the **BRICS group**, advocating for a **'bigger than five' agenda in the United Nations** (referring to the influence of the five members of the Security Council), and cultivating trade relationships, for example by **encouraging Turkish arms exports.**

Amidst a more unstable international environment, Turkey has also played **a more active role in shaping regional conflicts** that threaten to undermine its security. This **more assertive foreign policy**, coupled with its domestic politics, has **isolated it from its traditional NATO allies.**

Until recently, **domestic terrorism** from the separatist **Kurdistan Workers' Party (PKK)** has been the primary threat to Turkish internal security, having resulted in the deaths of approximately 40,000 people since 1984. It has also **strained relations with the US**, which backed Kurdish groups affiliated with the PKK in **Iraq** and **Syria**. However, the PKK announced a **ceasefire** in March 2025 and stated that it was **prepared to disband** itself in May 2025, though it is yet to reach a firm agreement with the Turkish government.

Turkey's relations with the West have also been tested by Erdoğan's **support for the Palestinian cause and Hamas**, as well as his **vocal criticism of Israel**, which he referred to as a 'terror state' in November 2023.

Turkey occupies a strategic position at the boundary of Europe and Asia that it can exploit to influence international affairs. In particular, its control of the straits in the Bosporus and Dardanelles that connect the Aegean and Mediterranean seas to the Black Sea endow it with significant influence over global trade and naval warfare. For example, under the 1936 Montreux Convention, warships belonging to nations involved in a conflict may not pass through the straits.

Turkey has also clashed with fellow NATO member **Greece** over its assertive policies in the **Eastern Mediterranean** and its **refusal to recognize the Republic of Cyprus**. Eager to exploit the region's natural gas reserves, Turkey has sought to gain backing for its contested territorial claims by providing military support to the **Libyan Government of National Accord (GNA)** despite a UN arms embargo. As with Turkey's other independent foreign policy actions, this has complicated its relationship with the EU and NATO.

Sources: BBC, Brookings Institute, Carnegie Endowment, CfR, Chatham House, CSIS, Insight Turkey, Presidency of the Republic of Turkey, Washington Institute for Near East Policy

Defense & Foreign Policy

Turkey needs to have a self-sufficient defense industry to be able to successfully pursue its policy of strategic autonomy.

Strategic Autonomy

A position of **strategic autonomy** is critical to the success of Turkey's assertive foreign policy. This refers to the capacity to act independently when Turkey's interests diverge from those of its allies. It **requires an advanced domestic defense industry with a diversified international supply base** that cannot be disrupted by foreign states.

This strategy was motivated by the imposition of a US arms embargo on Turkey following its **invasion of Northern Cyprus in 1974**. Turkey experienced similar disruption after its **2016 invasion of northern Syria**, when countries including **Germany and Canada blocked the export of subsystems** destined for use in Turkish defense equipment, hampering its defense industrial development, operational capacity, and exports. From Turkey's perspective, this means that it cannot become dependent on any one country or alliance and must instead **build relationships with multiple partners**.

The pursuit of strategic autonomy has created friction between Turkey and the rest of the NATO alliance. This was shown by Turkey's acquisition of the Russian **S-400 air-defense system** in 2017, which led to its **expulsion from the F-35 fighter program and the imposition of US sanctions**.

Turkey maintained its relationship with Russia after the 2022 invasion of Ukraine. While it did close the Turkish straits to Russian warships in accordance with the Montreux Convention, supplied military aid to Ukraine, and set up a **Black Sea corridor for Ukrainian grain exports** in July 2022, Turkey did not follow its NATO allies in sanctioning Russian companies importing dual-use goods. Moreover, it has continued to enjoy **close economic ties with Russia**, which supplies up to 50% of its natural gas and has built Turkey's first nuclear powerplant in Akkuyu. Turkey's **objections to ratifying Sweden's accession to NATO** over allegations that Sweden's anti-terror laws were too lax and had allowed PKK activists to operate within the country have engendered more mistrust from NATO.

As Turkey's relationship with NATO has become more strained, it has looked to other alliances to balance its reliance on the West. For example, it **applied to join BRICS in October 2024** and has received **Belt and Road investment** from China since 2015. Nevertheless, **NATO remains Turkey's closest defense partner** and its collective defense provisions continue to guarantee Turkey's strategic deterrence.

A further source of tension between the US and Turkey is Turkey's occupation of northern Syria and the military support it has provided to its **Syrian National Army (SNA)** proxy force, which has **attacked US-backed Kurdish forces**. However, the fall of the Assad regime and Turkey's influence over the dominant **Hayat Tahrir al-Sham (HTS)** group **may increase US dependence on Turkey for Middle Eastern security**.



T-155 Firtina self-propelled howitzers of the Turkish Army's 102nd Artillery Regiment during an exercise held in November 2024. Credit: @tcsavunma via X

Sources: Brookings Institute, Carnegie Endowment, Chatham House, Insight Turkey, Presidency of the Republic of Turkey, Washington Institute for Near East Policy



02 ECONOMIC ENVIRONMENT

Economic & Fiscal Environment

Having performed strongly in the early 2000s, the Turkish economy has suffered from sustained periods of recession, inflation, and currency devaluation since 2018, all of which has slowed growth.

Background

In the initial years following the AKP government winning power in 2002, the Turkish economy grew at rates in excess of 7% annually. However, progress has been interrupted by **sustained periods of recession, inflation, and currency devaluation**, on occasion exacerbated by government policy decisions.

Turkey's economy is broad-based, with a significant domestic market (population of around 85 million) and increasingly large numbers of middle-class households offering growth opportunities. **Exports** of goods and services accounted for just over **25% of GDP in 2013**, with **tourism** revenues totaling almost **4% of nominal GDP**.

Although huge progress has been made in **reducing inflation** and **controlling the budget deficit and government debt** (less than 25% of GDP in 2025 compared with 70% in the early 2000s), the current account deficit has stayed stubbornly high, except from when the economy was in a recession.

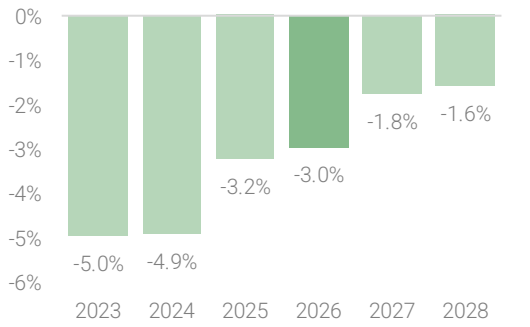
Government Debt

24.2% 2026 GDP

(37.0% 2021 GDP)

Fiscal Balance

-3.0% 2026 GDP



Recent Trends

The Turkish economy is still recovering from a period where **inflation reached as high as 80% in 2021**. This severely dampened domestic consumer demand which had been a key driver of economic growth in the preceding years. Consumer confidence seems to have bottomed out, however **levels of private consumption remains depressed**.

As a result, **economic growth has slowed from 5.1% in 2023 to around 3.6% in 2025** and is projected to fall below 3% by the late 2020s. Oxford Economics remain pessimistic about the rate accelerating in the short term.

A much more **stable economy** and **lower inflation in the early 2000s** underpinned **growth** in Turkey during that decade, but structural reform has lost momentum, curbing growth. The **appointment of market-friendly ministers** has triggered a more orthodox policy direction following the 2023 election, which may help to bring further economic reform back to the forefront of the government's agenda.

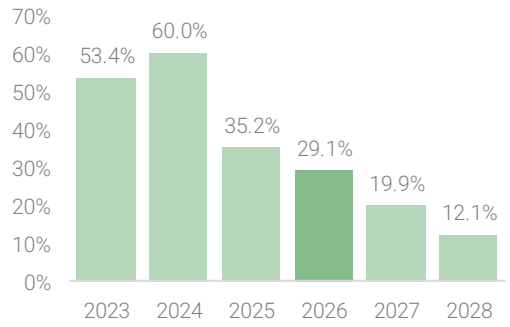
GDP Change (YoY)

+2.5% 2026

+2.6% Average 2026-2030

Inflation (CPI)

+29.1% 2026 YoY Change

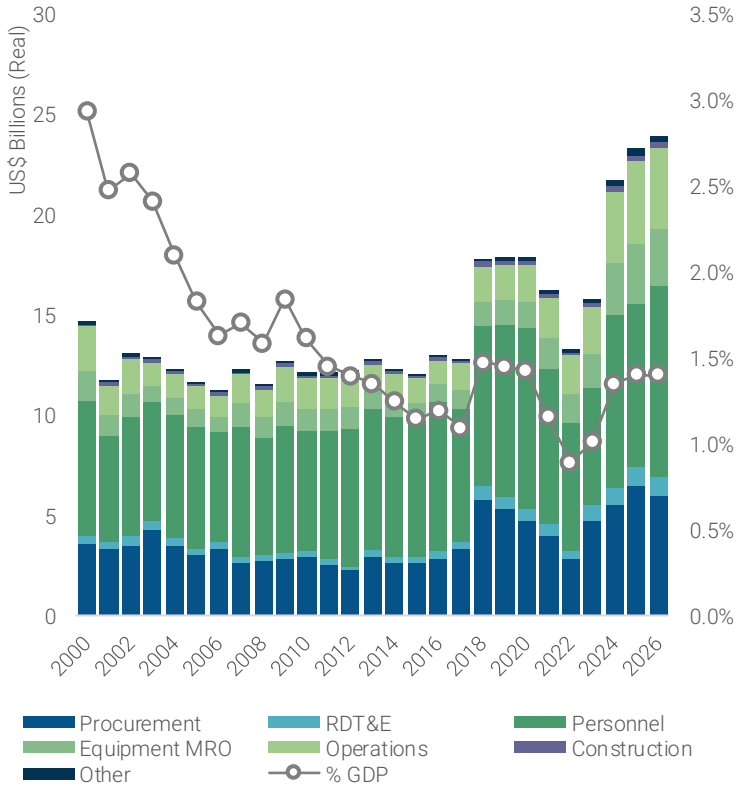


Source: Aviation Week Defense Market Analyzer, Oxford Economics

Defense Budget Background & Recent Trends

Economic and fiscal instability have led to wild fluctuations in the real-term levels of military spending. However, the government has since worked to restore the defense budget.

Overall Defense Spend (Real Terms)



Source: Aviation Week Defense Market Analyzer, Oxford Economics

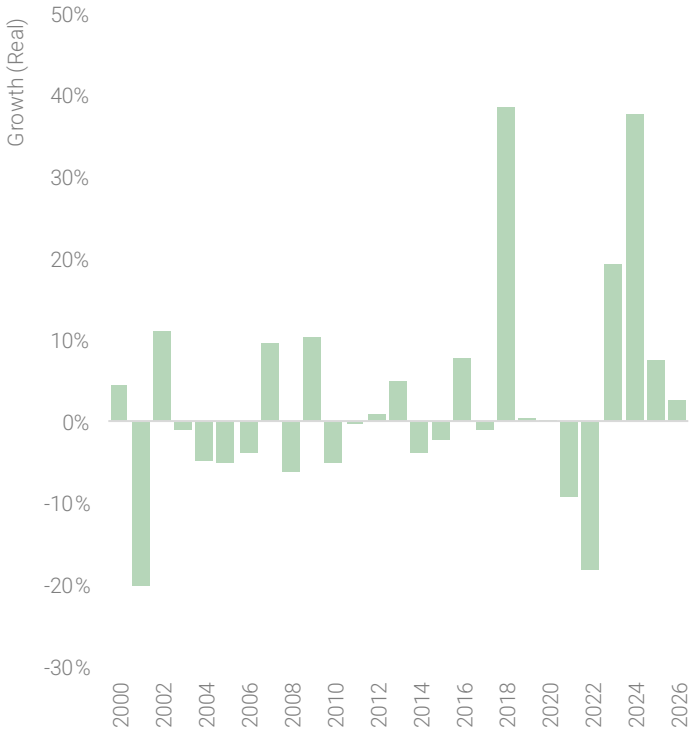
Recent economic and fiscal challenges have caused **major year-on-year fluctuations in Turkey's defense budget**, particularly in real terms. However, as stability has returned the government has ensured that spending has recovered to previous levels. While **the budget was increased by 101% in 2023 and 109% in 2024, spending is only around 30% higher in real terms than it was in 2019**, equivalent to an average of around **4-5% year-on-year real terms growth** through the period.

Membership of NATO confers a guarantee of security that has allowed the government to cut spending below 2% of GDP during times of economic and fiscal pressure. **The defense budget has not met the alliance's former 2% of GDP target since 2004 and has been below 1.5% of GDP since 2011**. The government has backed the new 3.5% of GDP NATO target but has yet to make any progress towards it.

Operations against Kurdish militants both in Turkey and Syria provide a floor for expenditures and are a **key source of public support**. Turkey has also taken on a more assertive **leadership role in regional security matters** which requires the maintenance of robust military capabilities.

With military spending viewed in a positive light by the electorate, the **need to protect the defense budget** has been used as a **justification for increases in specific taxation rates** in the past, though not always successfully.

Year-on-Year Growth (Real Terms)



Defense Budget By Function

Turkish procurement spending is increasingly dependent upon off-budget allocations through the Armed Forces Support Fund, which are used to fund domestic procurement programs.

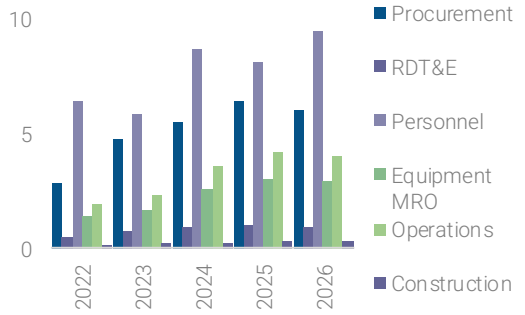
Budget by Function

The composition of Turkey's defense budget mirrors that of many of its European NATO allies. Between 45-55% of the budget is dedicated to personnel expenses, **20-30% to procurement,** and **20-30% to operating costs**. Fluctuations in the functional composition of the budget have generally been driven by major economic and fiscal events and resultant cuts to topline spending.

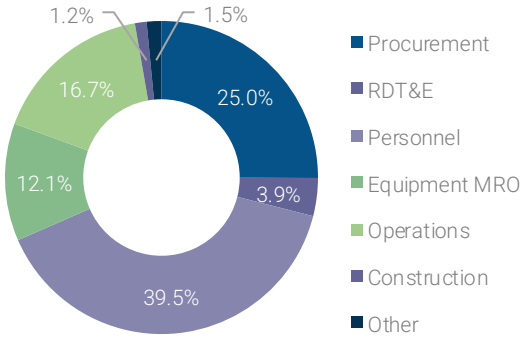
Over the **2023-2025 period, an average of 27.5% of the budget was dedicated to procurement compared** to an average of 25.1% in the preceding decade. This proportional increase in procurement spending has been **driven primarily by rapid growth in the size of the Defense Industry Support Fund** (or Savunma Sanayii Destekleme Fonu, SSDF) since 2021.

The SSDF is administered by the Secretariat of Defense Industries (SSB) and used to **finance local procurement programs** using **off-budget funding** generated by sales of specific consumer goods such as alcohol, tobacco, and state lottery games, in addition to some military-owned defense companies.

Spend by Function (Real US$ Billions)



Spend by Function 2026 (% Share)



Source: Aviation Week Defense Market Analyzer, Oxford Economics

Investment Budget

Defense investment expenditure comes both from both the **core defense budget** and the **off-budget** SSDF, with the latter source becoming **increasingly crucial**.

As Turkey has **shifted focus towards indigenous procurement since 2018,** the **share of the defense budget provided through the SSDF funding mechanism** has increased from an average of 17% annually between 2008-2017 to over **30% since 2018**. This share is likely to increase further still over the coming years.

Local defense industrial capacity is becoming an increasingly important **determinant of the level of procurement spending** given the indigenous focus of the SSDF. However, with a number of major local procurement projects now moving towards the procurement phase, further growth is anticipated.

According to official government figures, the **share of procurement spending spent locally has been rising steadily, passing 80% in 2025** from 20% in the early 2000s.

Procurement Spend

$6.0bn 2026
($3.9bn 2021)



The increased focus on the local defense sector has also resulted in **spending on RDT&E more than doubling in real terms** over the last decade with spending expected to increase further as major projects mature over the next five years.

With regards to **foreign procurement, the depreciation of the Turkish Lira has been a significant problem** in recent years by ostensibly inflating the costs of imported defense equipment. This has been a driver (along with a deterioration in the stability of relations with the US) behind the push for greater self-sufficiency, reducing the share of procurement in foreign currencies.

Defense Budget Short Term Outlook (0-3 Years)

Short term growth in Turkish defense spending is expected to be driven by increases to the Defense Industry Support Fund with core spending growth likely to be limited.

Turkish **defense spending** is expected to continue to **rise in real terms** despite a slowdown in the economy. However, growth may be **concentrated within the off-budget Defense Industry Support Fund** (SSDF) given the expectation of limited government revenue growth over the short term. This will ostensibly see **faster growth in procurement spending than in the overall budget** but with **this investment being directed primarily towards indigenous programs**. **Delays to overseas procurement are therefore possible** despite an expected increase in procurement spending.

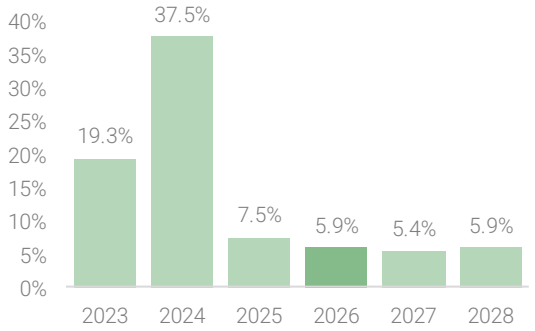
In October 2024, the government proposed the introduction of a new tax on high limit credit cards and real estate transactions to boost the size of the SSDF by around TRY70-80 billion or ~20%. While the measure was postponed indefinitely due to widespread opposition, it is a firm indication of **intent to raise spending through this mechanism** and in turn to devote more **funding to indigenous procurement.**

Procurement Spend

$7.6bn 2028 15.1%

($6.6bn 2026)

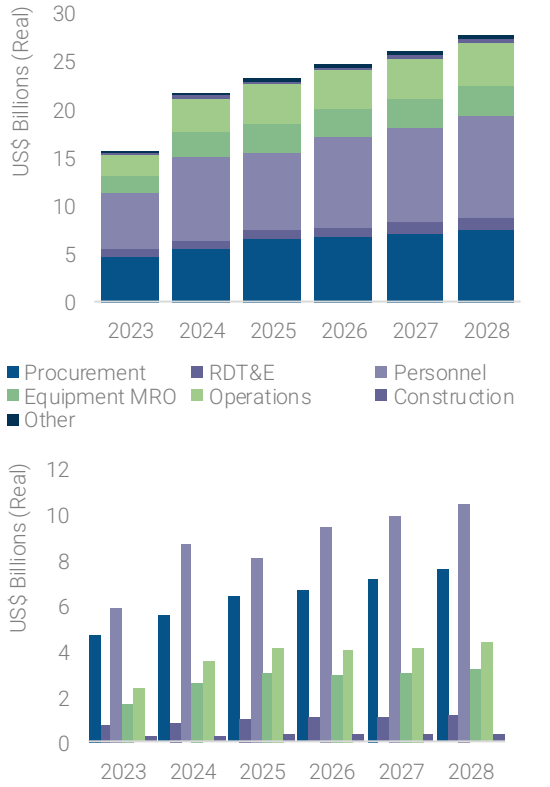
Defense Budget Growth (Real)



Treasury and Finance Minister Mehmet Şimşek stated in October 2024 stated that **the SSDF may need to be doubled in the coming years in order to support the Kaan fifth-generation fighter program** (and its related engine program) and the development of a comprehensive **new air and missile defense capability**. The proposed budget for 2025 stood at TRY252.3 billion; however, the postponement of the new revenue generation measures planned by the government could see this total adjusted.

Turkish **defense spending currently stands at around 2% of GDP** according to NATO figures (albeit with only around 1.4% of GDP spent on core defense), with government officials stating that the **budget will be gradually increased towards the new 5% of GDP target by 2035**. Given the challenging economic growth outlook and delicate fiscal environment in Turkey, rapid increases in the core defense budget appear unlikely over the next three years. Growth rates will be primarily dictated by the annual allocations to the SSDF which look set to increase significantly in 2026.

Spend by Function (Real US$ Billions)



Source: Aviation Week Defense Market Analyzer, Oxford Economics

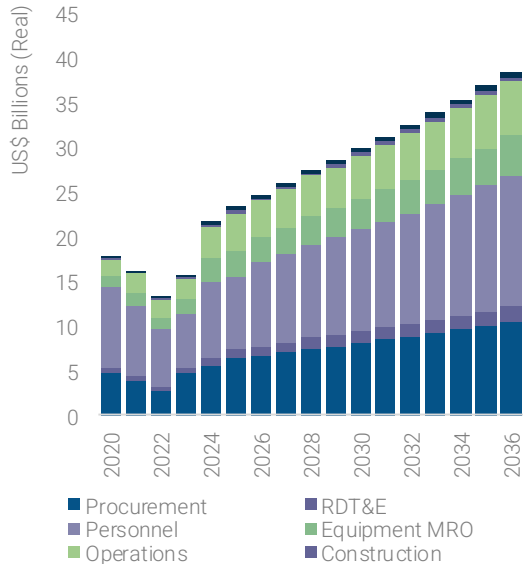
Defense Budget Long Term Outlook (4-10 Years)

Should Turkey's increasingly robust defense and foreign policy agenda be maintained, then defense spending will likely continue to grow slightly ahead of rates of economic growth.

Defense Budget

$38.5bn 2036 55.8%

($24.7bn 2026)



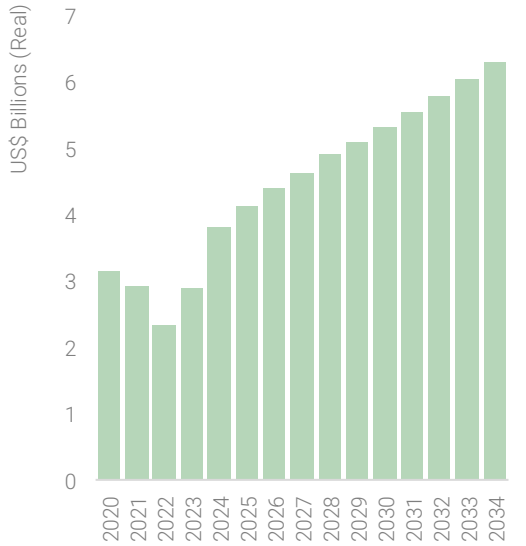
The ruling AKP party's **nationalist agenda** and more **assertive pursuit of foreign policy goals** will ensure **that defense is provided with the resources it requires in the long term.** President Recep Erdoğan was elected for a second term in 2023 effectively meaning there will be new leadership in 2028. However, the current president and AKP party continue to consolidate power, meaning there is a strong chance of a high degree of continuity beyond this point.

Ankara has been clear that it does not plan to pursue NATO's new 5% of GDP guideline spending level with the same degree of urgency as its allies in continental Europe, largely due to the differing state of relations with both Russia and the US. While gradual progress towards the new target is expected over the course of the next decade, **meeting even a 3% of the GDP level by 2030 appears highly unlikely** given fragility within the Turkish economy. The Turkish government is likely to broadly define its defense and security commitments in order to assess progress against this new target given similar accounting practices used to reach the previous 2% of GDP level.

Procurement Budget

$10.5bn 2036 58.6%

($6.6bn 2026)



Nevertheless, the AKP party's robust defense and foreign policy agenda is in alignment with higher levels of defense spending. **New NATO spending guidelines** are therefore likely to be used as a **partial justification** to a populous weary of new forms of taxation for future attempts **to raise military expenditure.**

With **GDP growth** expected to remain below 3% through the 2020s and early 2030s, gradual progress towards the 5% of GDP goal is achievable with real terms growth in the 4-5% range. A **return to growth rates over 5% is possible beyond 2030** should the economy accelerate, but this would likely require the government return to a process of economic reform. This would also likely reduce public opposition to higher levels of taxation to fund higher defense spending.

Economic development through support of the defense industry is also expected to remain a long-term strategy given high levels of public support. **Procurement of foreign made defense equipment is therefore likely to remain limited.**

Source: Aviation Week Defense Market Analyzer, Oxford Economics



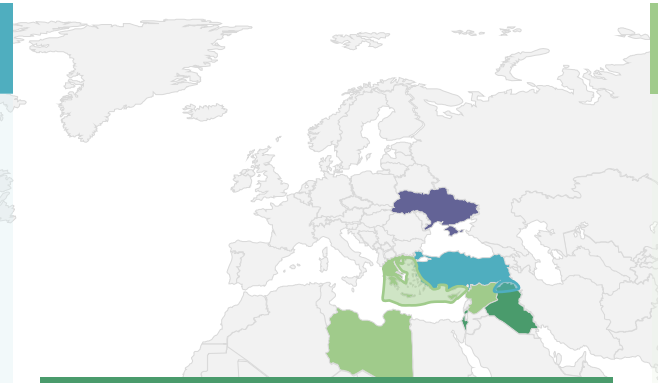
03 STRATEGIC ENVIRONMENT

Threat Map

The joint Israeli-US war against Iran is a major concern for the Turkish government as it could put its regional rival Israel in a more powerful position and undermine efforts to negotiate a peace with the PKK terrorist group.

Terrorism

Domestic terrorism has been identified by Turkish officials and the January 2025 update of the MGSB as the **primary threat** to Turkish internal security. Until recently, the separatist **Kurdistan Workers' Party (PKK)** has been the main terrorist threat, having waged an insurgency since 1984 that is estimated to have killed approximately **40,000 people**. Following the collapse of a temporary ceasefire in 2013, the Turkish Armed Forces launched a **counter-insurgency campaign** in southeastern Turkey in 2015 and deployed military personnel to counter Kurdish groups affiliated with the PKK in **Iraq** and **northern Syria**. However, the PKK's leadership announced a **new ceasefire in March 2025** and stated its intention to disband itself in May 2025 once it had reached an agreement with the Turkish government. As of March 2026, an agreement had yet to be reached and there were concerns in Turkey that reported **US proposals to arm Kurdish fighters in Iran** could undermine the peace process.



Iran War

The joint Israeli-US war against Iran is a major concern for Turkey. As of late March 2026, at least three **Iranian ballistic missiles** had been intercepted in Turkish airspace, although Iran has denied deliberately targeting Turkey. The Turkish government is also concerned by reports that the **US has considered arming Kurdish insurgents in Iran**, fearing that this could undermine its **deal with the PKK** and provide another haven for Kurdish separatists on its border. Iran's neutralization will also tilt the **regional balance of power** in favor of **Israel**, Turkey's main rival in the Middle East.

Eastern Mediterranean

Turkey faces tensions with fellow NATO member **Greece** over the boundaries of their **territorial waters and EEZs**, sovereignty over certain Aegean islands, and the **frozen conflict in Cyprus**. Turkey has sought to impose its claims over maritime territory containing natural gas reserves by providing **military support to Libya's Government of National Accord (GNA)** in return for the latter backing Turkish claims. It has refused to recognize Cyprus and has stationed troops in the unrecognized **Turkish Republic of Northern Cyprus.**

Russo-Ukrainian War

Although Turkey does maintain close economic relations with Russia, it regards an independent Ukraine as important for maintaining a **balance of power in the Black Sea region**. It has therefore provided **military aid to Ukraine** and **closed the Turkish straits to Russian warships** under the terms of the Montreux Convention.

769,632
Sq km Land

2,816
Km Land Borders

7,200
Km Coastline

~84m
Population

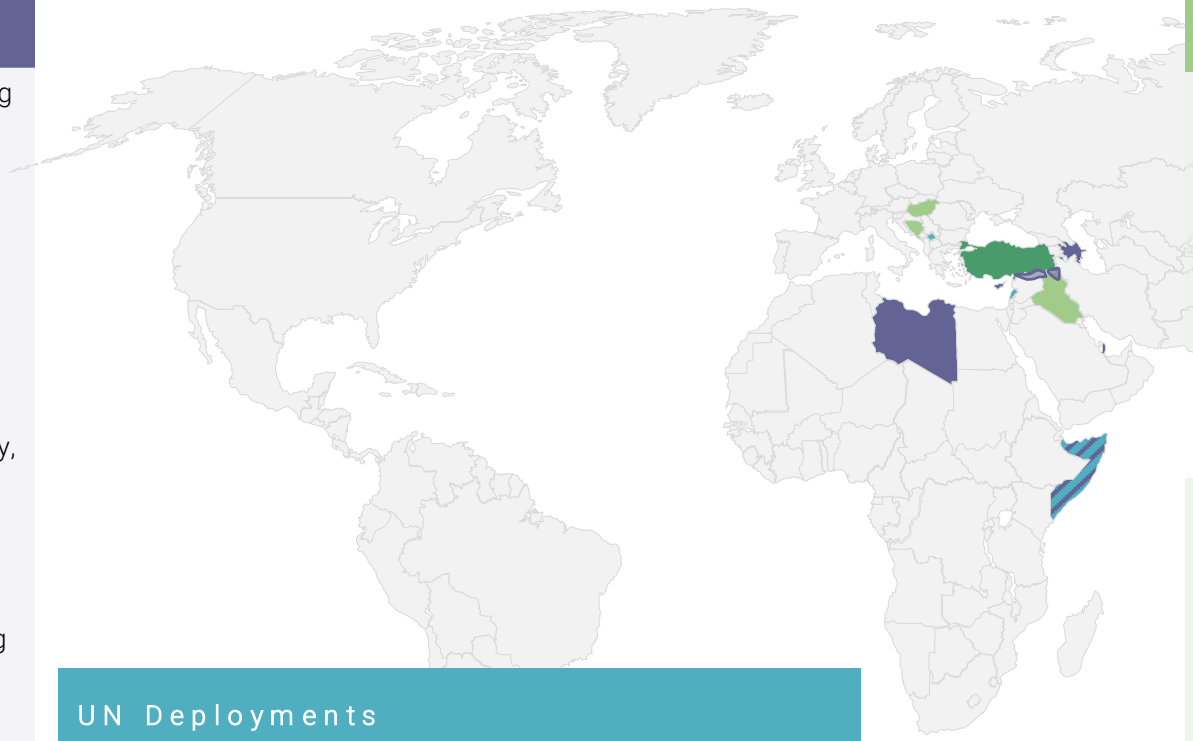
Sources: Atlantic Council, Brookings Institute, CfR, Chatham House, CSIS, IPS, MEI, RUSI, Washington Institute for Near East Policy

Current Operations & Exercises

Turkey has independently deployed tens of thousands of troops to support its more assertive foreign policy.

Independent Deployments

- **Azerbaijan** – 170 personnel including one EOD unit
- **Cyprus** – Approximately 33,800 personnel, 1,861 AFVs and artillery systems, 138 air-defense systems, and six aircraft deployed to defend the unrecognized Turkish Republic of North Cyprus
- **Iraq** – 4,000 personnel supporting Operation Claw-Lock
- **Libya** – Approximately 500 personnel, armored vehicles, artillery, and a UAV unit
- **Qatar** – 300 personnel supporting a training team, one mechanized infantry company, and one artillery unit
- **Somalia** – 800 personnel supporting a training team
- **Syria** – Approximately 3,000 personnel including 1 air-defense unit deployed to northern Syria
- **Turkey** – Unknown number of troops deployed for internal security, primarily in southeastern Turkey



UN Deployments

- **Kosovo** – One person supporting UNMIK
- **Lebanon** – 91 personnel and one frigate supporting UNIFIL
- **Somalia** – One person supporting UNTMIS

NATO/EU Deployments

- **Bosnia-Herzegovina** – 159 personnel supporting EUFOR Operation Althea
- **Hungary** – 100 personnel supporting NATO Forward Land Forces
- **Iraq** – 34 personnel supporting NATO Mission Iraq
- **Kosovo** – 730 personnel supporting NATO KFOR

Turkey is a **regular participant in NATO military exercises**. This continued into 2026, when it participated in **Steadfast Dart**, contributing approximately 2,000 personnel. However, it has also sent troops to exercises with other allies, including **Azerbaijan and Pakistan**. In addition to these overseas exercises, Turkey hosts its **own joint military exercises**, such as the **Efes** and **Anatolian Eagle** series. Held between April and May 2024, Efes 2024 involved the deployment of approximately 11,000 personnel from Turkey and 49 other countries.

Sources: CIA World Factbook, IISS, MSB

Armed Forces

Turkey has the second-largest military in NATO.

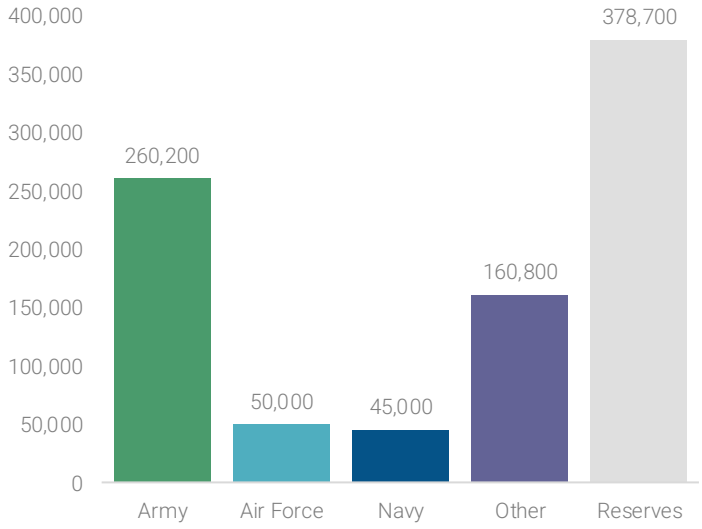
The **Turkish Armed Forces (TSK)** consists of three branches: the **Turkish Air Forces**, **Turkish Land Forces**, and **Turkish Naval Forces**. During wartime, the Ministry of the Interior's **Gendarmerie General Command** and the **Turkish Coast Guard Command** are also subordinated to the Land Forces and Naval Forces, respectively.

The primary responsibilities of the TSK are **protecting Turkey's territory**, fulfilling its military **commitments to NATO**, and participating in **international peacekeeping missions**. It can also be called upon to assist **humanitarian and disaster relief operations** and **domestic law enforcement**.

Expected to have sufficient combat readiness to fight **'two-and-a-half wars'** simultaneously (meaning two conventional campaigns and one counter-insurgency campaign against the PKK), the TSK is the **second-largest armed forces in NATO**. It has experienced combat against PKK insurgents in Turkey and has been **deployed to Iraq, Libya, and Syria**.

While there is a **desire to increase the professionalism of the TSK**, more than 17,500 officers were purged after a faction within the TSK launched a **failed coup in 2016**. The TSK is perceived as the **guardian of Turkish secularism** and has a **history of intervention in Turkish politics**, with elements of the military involved in coups in 1960, 1971, 1980, and 1997.

Personnel Numbers 2025



Note that the 'other' column includes personnel serving in the Ministry of the Interior's **Gendarmerie General Command** and **Turkish Coast Guard Command**.

Turkey has a system of **conscription** which mandates a **compulsory six-month period of military service** for all male citizens between 21 and 41 years old.



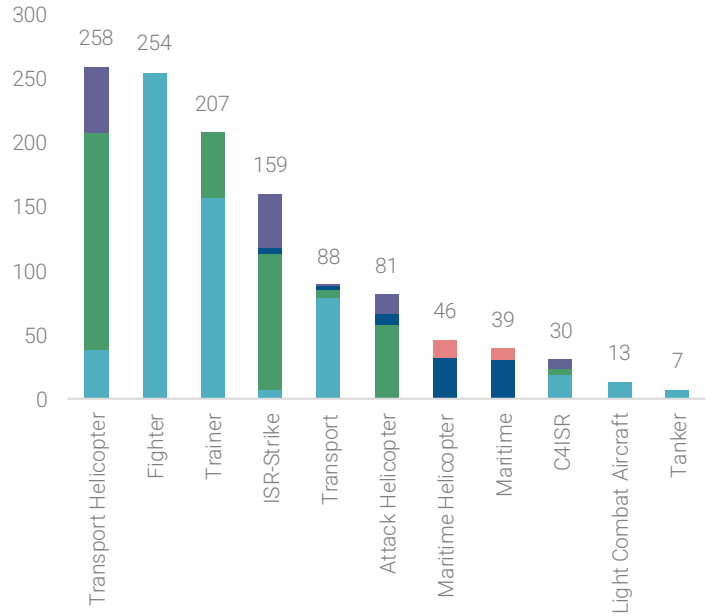
Troops from the 14th Armored Brigade Command fire a mortar at an exercise ground in the Turkish Republic of Northern Cyprus. Credit: @tcsavunma via X

Sources: CIA World Factbook, IISS, MEI

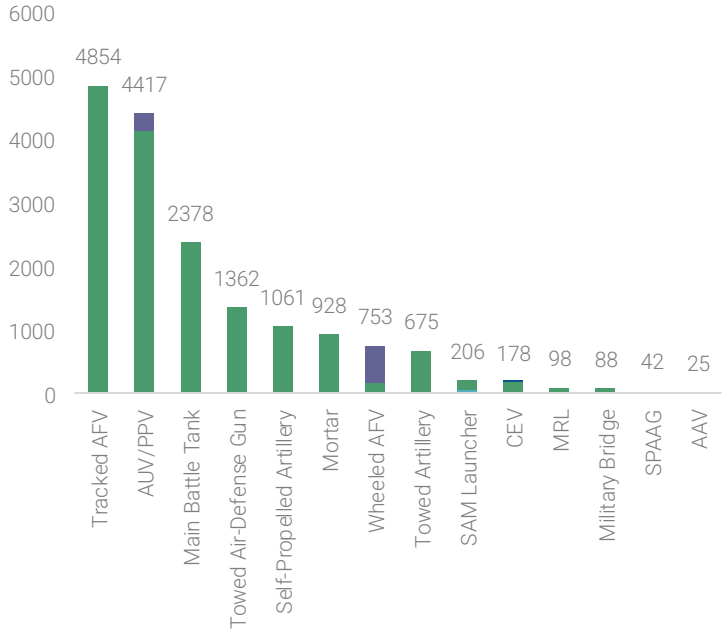
Armed Forces

As armed forces inventories regularly change, the numbers included here are intended to provide an overarching view of fleet structure as opposed to an exact snapshot at a particular point in time.

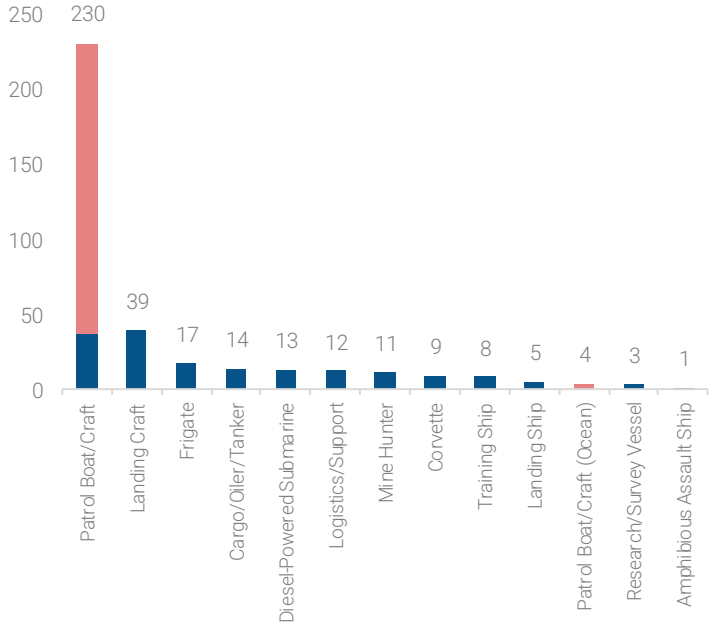
Air Platform Inventory
March 2026



Land Platform and Weapon System Inventory 2025



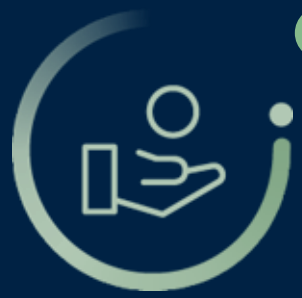
Naval Platform Inventory 2025



Air Force | Navy | Army | Gendarmerie | Coastguard

We have only listed large platforms where inventories are known and relatively static. The Turkish Armed Forces also operate air-to-air missiles, air-to-surface missiles, anti-radiation missiles, anti-ship missiles, anti-tank guided missiles, land-attack cruise missiles, laser-guided bombs, man-portable air-defense systems, one-way attack UAVs, recoilless rifles, and short-range ballistic missiles. The navy operates 14 USVs and UUVs. 12 Pars IV 6×6 wheeled AFVs are operated by the joint Special Forces Command.

Sources: Aviation Week Network DMA and Fleet Discovery, Aviation Week Analysis



04 PROGRAMS & REQUIREMENTS

Requirements Summary

High-profile Turkish defense programs are subject to considerable political oversight, and it is rare that they are publicly discussed or advertised before a contract has already been awarded.

The process behind determining Turkish defense requirements is **highly secretive and politicized**. According to research conducted by Transparency International in 2019, four classified documents devised by the Presidency and the Ministry of National Defense (MoND) inform defense requirements:

1. The **National Security Policy Document (MGSB)** 'Red Book' sets Turkish defense and foreign policy.
2. The **National Military Strategy of Turkey (TUMSAS)** outlines the threats facing Turkey, its strategic plans, and the broad military requirements it will need to fulfil the policy outlined in the MGSB.
3. The **Strategic Targets Plan (SHP)** provides long-term budget and procurement planning based on the TUMSAS and the **Operational Requirements Plan (ORP).**
4. The **Ten-Year Procurement Plan (OYTEP)** plans the budget that will be allocated to programs identified in the SHP and ORP over the next ten-years.

Since these documents are created under **presidential oversight**, high-profile Turkish defense requirements are suspected to be **more closely linked to political than military requirements**. One example of this is the decision to procure the **S-400 air-defense system** from Russia in 2017, which the military reportedly objected to.

Once a requirement has been finalized, it is **rare for it to be publicly advertised**. Instead, most high-profile defense requirements are directly communicated to industry by the **Defense Industry Agency (SSB).** Generally, these only become public knowledge after contracts have been awarded and details reported in the Turkish media.

Some low-value, less politically sensitive requirements are publicly advertised on the Turkish government's EKAP online tender platform or on the MoND website. The latter may occasionally also advertise requirements on bulletin boards outside military bases or in media announcements.



An S-70B Seahawk helicopter lands on the Turkish frigate TCG Gelibolu off the coast of Libya. Credit: @tcsavunma via X

Sources: FOI, Public Procurement Authority, SSB, Transparency International, US ITA

Current Major Programs

Progress of Program — Requirement Definition | Procurement Process Underway | Under contract


Credit: TAI

Kaan Fighter

Value:	> USD22.9 billion (est.)
IOC:	2028
Prime:	TAI

The Kaan (formerly known as TF-X) fifth-generation fighter program was initiated in late 2010 to provide an indigenous replacement for Turkey's F-16 fleet. Developed by TAI with the support of BAE Systems, the first prototype undertook its maiden flight in February 2024. However, the program has suffered from supply chain issues which may delay its ambitious schedule.


Credit: BMC

Altay Tank

Value:	USD25 billion (est.)
IOC:	2025 (est.)
Prime:	BMC

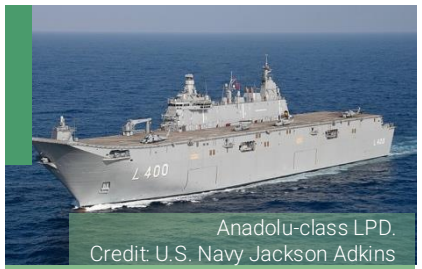
The Altay program formally began in 2008, when Otokar was awarded a contract to develop a new indigenous MBT. Development was completed by 2018, when a production contract for an initial batch of 251 tanks was awarded to BMC. However, serial production did not begin until 2024, primarily due to difficulties sourcing a powerpack for the vehicle.


Reis-class submarine. Credit: @tcsavunma via X

MILDEN Submarine

Value:	Unknown
IOC:	Early 2030s
Prime:	ASFAT

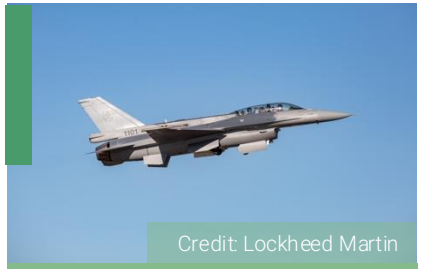
Development of the MILDEN (National Submarine) was started by ASFAT in 2012. With a displacement of approximately 2,700 tonnes, the MILDEN will be a diesel-electric submarine equipped with a range of Turkish-made subsystems. Construction of the first example started in 2025, with the first examples scheduled to be delivered to the Turkish Navy in the early 2030s.


Anadolu-class LPD. Credit: U.S. Navy Jackson Adkins

MUGEM Carrier

Value:	Unknown
IOC:	Unknown
Prime:	ASFAT

Turkey revealed that it was designing the MUGEM (National Aircraft Carrier) in early 2024. As the name suggests, this is intended to be developed and produced without foreign assistance. Construction of the first example started at the ASFAT Istanbul Naval Shipyard in early 2025. A delivery schedule for the program has not been disclosed.


Credit: Lockheed Martin

Steel Dome

Value:	> US$6.9 billion
IOC:	2028
Prime:	Aselsan & Roketsan

Aselsan, Roketsan, and TÜBİTAK SAGE are developing a networked, multilayered air-defense system under the Steel Dome project. An initial batch of components for the system worth US$460 million were delivered in August 2025. This was followed by a further batch of contracts worth US$6.5 billion awarded to Aselsan and Roketsan in November 2025.

Sources: AWIN, CRS, Defense Media, MSB

Additional Programs – Air Platforms & Systems

Typhoon Fighter
The Turkish government signed an agreement with the UK government to procure 44 Eurofighter Typhoon fighter aircraft in October 2025. BAE Systems will produce 20 new aircraft, while the remainder will be provided by Oman and Qatar.

Program Value
US$10.7 billion
IOC
2026

Hürjet Trainer
Development of the Hürjet commenced in 2017. The Turkish Air Force ordered 12 Hürjet Block 1 trainer aircraft in April 2024 one year after a prototype had completed its maiden flight. Deliveries are planned for 2026.

Program Value
Unknown
IOC
2026

T929 ATAK-II Helicopter
TAI started development of the T929 ATAK-II in April 2019 to provide a successor to the T129 ATAK. The first three examples were scheduled to be delivered to the Turkish Army in 2025, but it is unclear whether this occurred.

Program Value
Unknown
IOC
2025 (?)

C-130J-30 Transport
In July 2024, it was reported that Turkey had purchased 12 surplus C-130J-30 Hercules transport aircraft from the UK MoD. Marshall Aerospace received an MRO contract to support the fleet in October 2025.

Program Value
Unknown
IOC
2026

T625 Gökbey Helicopter
Turkey plans to order up to 112 TAI Gökbey helicopters to equip all branches of its armed forces, as well as its Gendarmerie, Coast Guard, and police. TAI received a contract for 20 in April 2024, followed by a further 57 in July 2025.

Program Value
Unknown
IOC
2024

F-16V
Turkey received approval to procure 40 new F-16V fighter aircraft and upgrade 79 legacy F-16s to the same standard in January 2024. While it has allocated US$1.4 billion to acquire the new F-16Vs, the upgrade will now be carried out by TAI.

Program Value
US$7 billion
IOC
Unknown

KC-135R Replacement
Turkey plans to procure a replacement for its fleet of seven KC-135R Stratotanker tanker aircraft. Reports from July 2025 indicate that either the Airbus A330 MRTT or the Boeing KC-46A is likely to be selected.

Program Value
Unknown
IOC
Unknown

Progress of Program: Requirement Definition | Procurement Process Underway | Under contract

Sources: AWIN, Defense Media, UK Government

Additional Programs – Land Platforms & Systems

T-155 Panter Artillery
ASFAT's 2nd Main Maintenance Factory Directorate is producing the T-155 self-propelled howitzer for the Turkish Army using components from Aselsan, BMC, and MKE. All 40 systems are projected to be delivered by the end of 2026.

Program Value
Unknown
IOC
2025

Pars Alpha NGAV
FNSS was awarded a contract to produce an initial batch of 25 Pars Alpha 6×6 and 8×8 armored vehicles in February 2025. The order was part of the Next Generation Armored Vehicles program, which will procure up to 2,000 vehicles.

Program Value
US$65 million
IOC
Unknown

Altuğ NGAV
BMC received a contract to produce an initial batch of 29 Altuğ 8×8 armored vehicles in February 2025. The order was part of the Next Generation Armored Vehicles program, which will procure up to 2,000 vehicles from FNSS and BMC.

Program Value
Unknown
IOC
Unknown

Turan AUV
As of July 2025, BMC had reportedly received a contract to deliver more than 50 of its Turan armored utility vehicles to the Turkish Army. The first examples were delivered in March 2026.

Program Value
Unknown
IOC
2026

Leopard 2A4 Tank Upgrade
81 of Turkey's Leopard 2A4 tanks are being upgraded by BMC (with Aselsan as the main subcontractor) under a contract awarded in 2022. The contract includes an option to upgrade a further 250 Leopard 2A4s to the same standard.

Program Value
Unknown
IOC
Unknown

M60T1 Tank Upgrade
Aselsan is upgrading Turkey's M60TM tanks to the M60T1 standard under a contract it received in July 2022. This upgrade replaces several foreign subsystems used on the M60TM with domestically-produced equivalents.

Program Value
Unknown
IOC
2024

Tracked AFVs
As part of its Next Generation Armored Vehicles program, Turkey is reportedly seeking up to 1,800 new tracked vehicles in both amphibious and non-amphibious configurations. Either FNSS or Otokar is likely to be selected.

Program Value
Unknown
IOC
Unknown

Progress of Program: Requirement Definition | Procurement Process Underway | Under contract

Sources: AA, Company Websites, Defense Media

Additional Programs – Naval Platforms & Systems

TF-2000 Destroyer
The Turkish Navy started the TF-2000 air-defense destroyer program in July 2017. After a competitive tender, construction of the first example began at ASFAT's Istanbul Naval Shipyard in January 2025.

Program Value
Unknown
IOC
Unknown

I-class Frigate
The Turkish Navy plans to induct eight I-class frigates. A contract for the construction of the 2md, 3rd, and 4th vessels was awarded to the TAIS Shipyards and STM JV in April 2023, with deliveries scheduled by 2026.

Program Value
Unknown
IOC
2024

Reis-class Submarine
German company TKMS was awarded a contract in 2009 to construct six Type 214TN Reis-class submarines at Turkey's Gölcük Naval Shipyard. All six submarines are scheduled to be commissioned by the end of 2029.

Program Value
US$3.96 billion
IOC
2024

Hisar-class Patrol Vessel
The Turkish Navy plans to commission ten Hisar-class patrol vessels. ASFAT received a contract to deliver the first two vessels in November 2020. Launched by the Istanbul Naval Shipyard in September 2023, the first was delivered in 2025.

Program Value
Unknown
IOC
2025

NFAC
STM was contracted for the design of the Turkish National Fast Attack Craft (NFAC) in 2020. A prototype is being constructed by the Istanbul Shipyard, and up to ten series-production vessels are expected to be built.

Program Value
Unknown
IOC
Unknown

YLCT LST
The Anadolu Shipyard received a contract to build eight New Type Landing Craft (YLCT) LCTs for the Turkish Navy in April 2024. It delivered the first example in late 2025 and is scheduled to deliver the final example by May 2027.

Program Value
Unknown
IOC
2025

Progress of Program: Requirement Definition | Procurement Process Underway | Under contract

Sources: Defense News, EDR, Janes, Naval News, Overt Defense

Additional Programs – Weapon Systems

Sapan Surface-to-Air Missile
Roketsan was awarded a contract to initiate mass production of the Sapan surface-to-air missile in January 2024. This will be launched from Turkey's indigenous MIDLAS vertical launch system installed on I-class frigates.

Program Value
Unknown
IOC
Unknown

AIM-120C-8 Air-to-Air Missile
The US State Department approved the possible sale of up to 53 RTX AIM-120C-8 AMRAAM missiles to Turkey in May 2025. The missiles were to be used to arm the Turkish Air Force's F-16 fighter aircraft fleet.

Program Value
US$225 million
IOC
Unknown

Long-Range Ballistic Missile
Erdoğan announced that Turkey was developing a missile with a range of 2,000 km in January 2025. It is possible that this refers to the Cenk or the Roketsan Tayfun Block 4 ballistic missile, which is planned to enter production in 2026.

Program Value
Unknown
IOC
Unknown

Atmaca Cruise Missile
Roketsan was awarded a contract to begin serial production of the Atmaca anti-ship cruise missile in January 2024, with initial deliveries having commenced in 2021. It will replace US-made Harpoon missiles on 11 Turkish naval platforms.

Program Value
Unknown
IOC
2021

L-OMTAS Anti-Tank Missile
Roketsan announced that it had initiated serial production of the L-OMTAS anti-tank guided missile in March 2026. It is likely that this will replace tripod- and vehicle-launched versions of the Russian Kornet-E missile.

Program Value
Unknown
IOC
Unknown

AIM-9X Air-to-Air Missile
The US State Department approved the possible sale of up to 60 RTX AIM-9X Sidewinder air-to-air missiles to Turkey in May 2025. The missiles were to be used to arm the Turkish Air Force's fleet of F-16 fighter aircraft.

Program Value
US$79.1 million
IOC
Unknown

Meteor Air-to-Air Missile
As part of its acquisition of the Eurofighter Typhoon fighter aircraft, Turkey is expected to procure the MBDA Meteor air-to-air missile. However, its domestic industry is also developing the Gökbora and Gökhan alternatives.

Program Value
Unknown
IOC
2026 (est.)

Progress of Program: Requirement Definition | Procurement Process Underway | Under contract

Sources: AWIN, Defense Media, DSCA



05 PROCUREMENT EVIRONMENT

Procurement Process and Policy

Turkish law allows defense procurement to be exempted from formal procedures designed to provide transparency and a 'level playing field' for suppliers.

Procurement Law

Turkish government procurement is governed by **Law No.4734** (Public Procurement Law). Published in 2002, this law was amended in 2010 to align it more closely with EU legislation.

Under **Article 3** of the law, **exemptions to its provisions are allowed for the procurement of goods, services, and works related to defense, security, intelligence**, or anything else that is deemed to be related to national security or to require confidentiality.

This means that defense procurement is not obligated to follow set procedures that guarantee transparency, competition, and the equal treatment of suppliers. Consequently, **Turkish defense procurement is shrouded in secrecy** and – according to research conducted by Transparency International – subject to politicization and at high risk of corruption.

Types of Procurement

Once a Turkish defense requirement has been identified and its budget approved, a **Project Definition Document (PDD)** is prepared to transition it to a formal program. The PDD is a **classified document** containing information on the program's requirements and its implementation timeframe.

Three broad types of procurement programs are identified by Transparency International:

1. **Service-led programs for addressing urgent operational requirements (UORs).** These are unlikely to require a PDD as they are low-value and intended to meet unforeseen operational needs.
2. **Procurements overseen by the Ministry of National Defense (MSB)** from its allocated budget.
3. **High-value, political procurements** that are not publicly advertised.

Non-UOR programs are administered by either the MSB or the Defense Industry Agency (SSB), with the activities of the latter closely overseen by the presidency.

The **SSB is understood to oversee most of the high-profile programs** that include collaboration with foreign suppliers, such as joint development.



Turkish Air Force F-16s. Credit: @tcsavunma via X

Sources: IISS, Public Procurement Authority, SSB, SWP, Transparency International, Turkish Investment Office, US ITA

Procurement Process and Policy

Turkey's offset legislation, its SSDF domestic industry funding, and its preference for closed competitions and non-competitive single-source acquisitions can limit opportunities for foreign suppliers.

Competition & Selection

Minor, **low-value programs conducted by the MoND are generally subject to a competitive tendering process** and are more likely to be publicly advertised. However, **high-profile defense programs overseen by the SSB are considerably less transparent and more likely to result in non-competitive singe-source acquisitions or closed competitions** that are restricted to a shortlist of approved suppliers.

It is unclear which criteria are used to inform procurement decisions, but it has been alleged by Transparency International and other organizations that **political considerations may hold greater influence than factors related to cost or technical performance.** Examples cited to support this contention include the procurement of the Russian S-400 air-defense system and the decision to award the Altay MBT production contract to BMC, a company with close links to Erdoğan's family and his Justice and Development Party.

Offsets

Turkish defense programs are expected to meet **offset obligations**. These are **administered by the SSB**, which signs separate offset agreements with contractors once they have been selected.

According to guidelines published by the SSB, **contracts worth USD5 million or more are liable to offsets worth at least 70% of the contract value**. Local content stipulations can also apply to domestic contractors that rely on foreign subcontractors.

Three types of offset are identified in the Turkish regulations:

- **Category A** covers activities conducted by Turkish industry.
- **Category B** encompasses product and service exports.
- **Category C** relates to technological cooperation and investment into new or existing Turkish companies.

Each of these categories contains its own stipulations. For example, **the workshare liability of SMEs must be at least 30% of the value of the activities covered by Category A.**

The IISS reported in 2024 that **foreign suppliers consider some of these offset obligations to be unclear and overly demanding**, suggesting they may need to be revised.



A Turkish Army M113 APC during a training exercise held by the 1st and 12th Mechanized Infantry Brigades. Credit: @tcsavunma via X

Sources: IISS, Public Procurement Authority, SSB, SWP, Transparency International, Turkish Investment Office, US ITA

Bid Evaluation Criteria

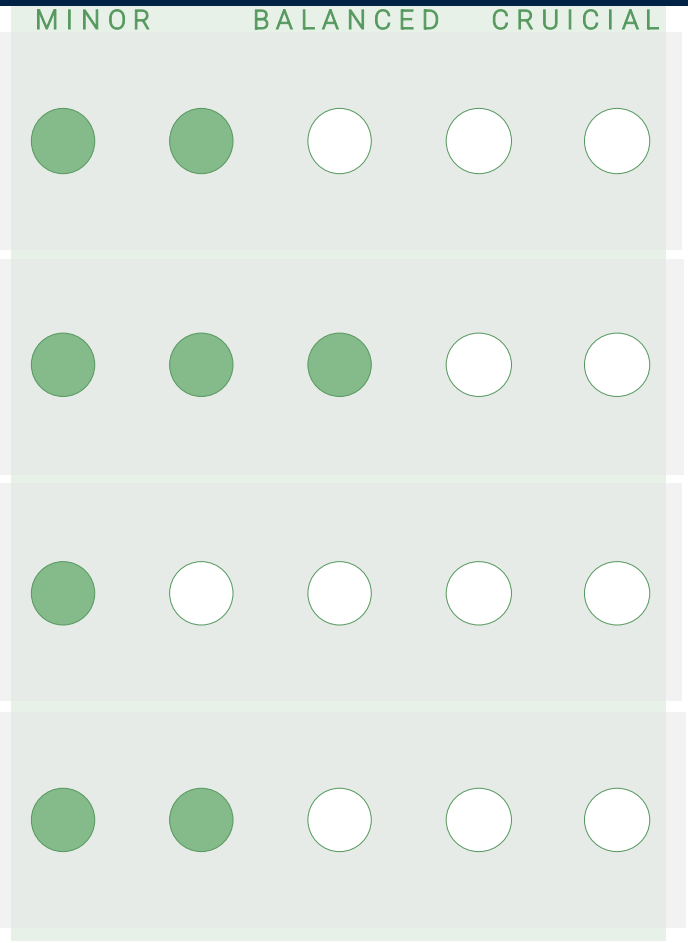
Amidst the Turkish government's drive increase the autonomy of its defense industry, bids that contribute to Turkish defense industrial development are most likely to find success.

		MINOR		BALANCED		CRUCIAL
TECHNOLOGY/ CAPABILITY	Erdoğan's government values the possession of advanced military capabilities as a **signifier of Turkey's international prestige**, particularly if they are Turkish-made. However, Turkey's ejection from the F-35 program has shown that it is **willing to forego opportunities to acquire the most advanced equipment if this conflicts with its foreign policy and its defense industrial development priorities.**	●	●	●	○	○
TRANSFER OF TECHNOLOGY/ INDUSTRIAL ENGAGEMENT	Increasing the capabilities of the Turkish defense industry and **reducing its reliance on foreign suppliers** are critical to enabling **Turkey's independent foreign policy**. Bids involving foreign suppliers and partners must therefore adhere to a **demanding offset policy**. Moreover, the **substitution of Turkish-made components for foreign systems** is increasingly highlighted as a key factor behind the launch of new programs.	●	●	●	●	●
PRESTIGE	The possession of advanced capabilities and the development of a self-sufficient defense industry is linked to Erdoğan's desire to portray Turkey as an **autonomous actor** and **nascent superpower** to his international and domestic audience. This has resulted in the **presidency exerting greater control over capital defense programs**, with **decisions sometimes motivated by political factors** more than military requirements.	●	●	●	●	○
DIPLOMACY	With an increasing proportion of Turkey's defense equipment procured from its domestic industry, **diplomacy is rarely a factor in regular Turkish procurement**, although its preferred partners are western and western-aligned countries such as South Korea. The major exceptions to this are capital procurements that are explicitly linked to foreign policy initiatives, such as the purchase of the Russian S-400 air-defense system in 2017.	●	●	○	○	○

Sources: Aviation Week Analysis, Carnegie Endowment, IISS, War on the Rocks

Bid Evaluation Criteria

Turkey's opaque procurement process makes it difficult to assess the importance of traditional criteria such as price and delivery time against more intangible political factors.



SPEED	**Delays are common in Turkish defense procurement**, especially for technologically sophisticated programs that can be more vulnerable to external disruption from arms embargos. **This risk is usually accepted if waiting will benefit Turkish industry**. Unlike some other NATO countries, Turkey has not disclosed plans to create novel rapid procurement mechanisms to fill urgent capability gaps.
PRICE	Price is understood to be **a factor in deciding the winner of competitive Turkish defense programs** and has been cited as a factor in Turkish procurement decisions, such as with the rejection of Otokar's bid for production of the Altay tank in 2017. Turkey's **high inflation rate** can also create a barrier to entry for foreign suppliers looking to supply components to Turkish companies, encouraging greater reliance on Turkish industry.
FINANCIAL FLEXIBILITY/ AID	As it is now increasingly uncommon for Turkey to source its defense equipment from abroad, the **provision of financing is a negligible factor in most procurement decisions.** Although Turkey has attempted to participate in **EU-funded defense programs**, its diverging foreign policy has led to these efforts being rejected by the EU.
INTER-OPERABILITY	Turkey is a **NATO member** and can produce equipment that adheres to NATO standards. This is important as it **helps it market its products to export clients**. Nevertheless, Turkey also operates **non-standard equipment** including anti-tank missiles and air-defense systems supplied by Russia, NATO's primary adversary.

Sources: Aviation Week Analysis, Carnegie Endowment, IISS, War on the Rocks

Procurement Case Study

The Altay main battle tank is a good illustration of Turkey's persisting dependencies on foreign suppliers and its determination to make its domestic prestige programs succeed, even if this means accepting lengthy delays.

2008

July 2008: Otokar is awarded a **USD494 million development contract** for the Altay programme, with Aselsan, MKE, and Roketsan selected as subcontractors.

South Korean company **Hyundai Rotem** is awarded a **USD400 million contract** by Otokar to provide development assistance including **technical expertise and technology transfer**.



The Altay program has its roots in the 1990s, when Turkey began to investigate the procurement of a **domestically produced replacement** for thousands of its German- and US-supplied MBTs. It is estimated that **as many as 1,000 Altays could be produced**. Development and production of the program was competed separately, with **Otokar** being awarded the development contract and **BMC** the production contract.

2011

May 2011: A mock-up of the Altay is publicly displayed for the first time at the **IDEF 2011** defense exhibition.

2017

May 2017: Otokar announces that its offer to produce an initial batch of **250 Altay MBTs** had been rejected by the Turkish government due to disagreements over its price.
Instead, a **competitive tender** for the Altay production contract is launched by the Turkish government in **July.**

2018

November 2018: BMC is selected as the winner of competitive tender for production of the Altay MBT and awarded a contract to produce **251 tanks** in three different variants. Reports indicate that the program could be worth between **USD25 and USD30 billion** over the following **20-year period**.

2023

Turkey's **invasion of Syria** in 2016 led Germany to block arms exports to Turkey. This resulted in **years of delays** to the Altay program, as Turkey was unable to secure any more of the German-made **powerpacks** used in the prototypes. To overcome this hurdle, Turkey turned to **South Korean companies** to supply an interim powerpack for the initial batches, while BMC developed a **domestic Turkish powerpack**.

January 2023: Following years of delays to the Altay program caused by Germany's refusal to supply Turkey with powerpacks, BMC signs a contract with **South Korean** company **SNT Dynamics** for EST15K transmissions that can be installed in the Altay.

May: BMC displays the first prototype of the **New Altay**.



2024

May: The SSB announces that BMC has **begun serial production** of the New Altay platform, **four years** after deliveries were supposed to have commenced.



Sources: BMC, Daily Sabah, Defense News, Defence Turkey, Janes, Otokar, Shephard Media



06 INDUSTRIAL EVIRONMENT

Defense Industry - Background

Turkey's strategic autonomy depends on its domestic defense industry reducing its reliance on foreign suppliers.

Turkey's drive for **strategic autonomy** has encouraged it to invest in its domestic defense industry. This desire stems from its experiences of the disruption to its operational capabilities caused by **arms embargoes** imposed on it by other NATO members following its invasion of northern Cyprus in 1974 and northern Syria in 2016. By gaining the capability to indigenously develop and produce defense equipment, it will be **less dependent on overseas suppliers** and therefore face **fewer restraints on its foreign policy**.

Turkish **domestic politics** also incentivises defense industrial development. Erdoğan's populist Justice and Development Party (AKP) can point to defense industrial development as a symbol of Turkey's growing **international prestige**.

Consequently, whereas Turkey imported or produced under license most of its defense equipment in the 20th century, as of 2025 it had progressed to **manufacturing most of its own platforms and subsystems**, albeit often using **foreign components and design assistance**.

This increased defense industrial capability is reflected in the growing prominence of Turkish companies in the global defense market. For example, **five Turkish companies were listed in Defense News' top 100 defense companies** by revenue for 2024: Aselsan, ASFAT, MKE, Roketsan, and Turkish Aerospace Industries (TAI). Turkish companies have also expanded their **global footprint**, with **Baykar acquiring Piaggio Aerospace** in December 2024.

The **Defense Industry Agency (SSB)** claimed that the number of defense programs with Turkish industry involvement increased from **62 in 2002 to 812 by 2022**, while the total value of contract rose from **USD5 billion to USD60 billion** across the same period. The Turkish government also stated the **localization rate** of its defense procurement had reached **80% by 2023**.

Many of the largest companies in the Turkish defense industry are **fully or partially state-owned**, including all five of those mentioned in the Defense News top 100 list.



The Bayraktar TB2 UAV is one of the Turkish defense industry's export successes, having been sold to more than 30 countries. Credit: Baykar

Sources: Atlantic Council, Carnegie Endowment, Defense News, Defence Turkey, IISS, Janes, MEI, Reuters, SIPRI, SSB, SWP, US ITA, War on the Rocks

Defense Industry - Background

Although Turkey has successfully created an industry capable of independently producing low-technology platforms, it has yet to overcome its dependence on foreign suppliers for many of the more complex components.

In building up its defense industry, Turkey has focused on **manufacturing platforms and some subsystems**. According to statistics released by the **Turkish Defense and Aerospace Industry Manufacturers Association (SASAD),** air platforms accounted for 20% of the turnover value of the Turkish industry in 2022, followed by land platforms at 15%, weapon systems at 12%, and naval platforms at 10%. One of the industry's main strengths is **UAVs**, which it had exported to approximately **30 countries** between 2018 and 2023.

Looking to future areas of investment, the SSB has published a **Strategic Plan for 2024-2028**. Its goal is for Turkey's defense industry is to be capable of developing **technologically superior** products that will meet Turkey's needs and be **competitive on the export market**. It is aiming to increase the defense industry's exports, its manufacturing of **dual-use components**, and its capabilities in **emerging technologies**. The latter includes AI, microelectronics, space technology, propulsion systems, advanced materials, and innovative manufacturing techniques.

However, despite these advances and aspirations, there are several **barriers** hindering Turkish defense industrial development.

Most seriously, Turkish platforms remain reliant on **foreign suppliers** for many **complex components**, such as engines. This dependency is exacerbated by Turkey's **high inflation**, which increases the cost of purchasing systems from abroad. Due to Turkey's strained relations with many of its NATO allies, it is also more difficult for Turkish companies to participate in **multinational defense programs**, particularly those that are funded by the **EU.**

Furthermore, the monopolization of Turkish procurement by established companies means that Turkey has a **shallow pool of SMEs** in the defense sector, which may **impair its competitiveness in emerging technologies**. Turkey's dire economic situation has also led to so-called '**brain drain**', with skilled workers possessing STEM qualifications more inclined to seek employment overseas.



Four Ada-class corvettes participating in the Blue Homeland 2025 naval exercise. Credit: @tcsavunma via X

Sources: Atlantic Council, Carnegie Endowment, Defense News, Defense Turkey, IISS, Janes, MEI, Reuters, SIPRI, SSB, SWP, US ITA, War on the Rocks

Summary of Domestic Industrial Capability

Platforms

1 2 3 4 5

Capability is scored on a scale of 1 to 5, with 5 being ability to design and build entire platforms and their sub-systems across the whole domain.

	OVERALL		DESIGN/ DEVELOP	BUILD	UPGRADE	SUPPORT
AIR	●	Turkey is becoming **increasingly capable** in the indigenous development, production, and support of manned aircraft. Domestically designed trainers and helicopters are in production for the Turkish Armed Forces. Turkey is also a **dominant player in the unmanned aerial vehicle sector**, However, Turkey has required **foreign assistance** to develop more complex equipment, such as the **Kaan fifth-generation fighter**, which has yet to enter production. Furthermore, it is reliant on foreign suppliers to provide the **engines** used in most of its products.	●	●	●	●
LAND	●	Turkey can **independently design and produce light wheeled vehicles and most of their components**, including engines. While it is attempting to produce an indigenous tank and self-propelled howitzer, these were developed with **foreign partners** and use **foreign powerpacks**. Apart from transmissions, Turkish companies can produce and integrate most of the subsystems needed to upgrade a land platform. They have also produced demonstrators using **emerging technologies**, such as **hybrid-electric drivetrains** and **uncrewed systems**.	●	●	●	●
MARITIME	●	Turkey can **design and build most types of surface vessels**, ranging from small patrol craft up to frigates. Its capabilities as regards to submarines and larger surface vessels such as aircraft carriers are less mature. Although Turkey has **license produced submarines** and initiated programs to domestically develop its own **diesel-electric submarine**, destroyer and **aircraft carrier**, it remains to be seen whether these will be successful. An increasing proportion of the **subsystems** needed to outfit and upgrade vessels are also produced in Turkey.	●	●	●	●

Sources: Company websites, Aviation Week Analysis, Defense News, Defense Turkey, IISS, Janes

Summary of Domestic Industrial Capability

Systems

1 2 3 4 5

Capability is scored on a scale of 1 to 5, with 5 being ability to design and build entire platforms and their sub-systems across the whole domain.

	OVERALL		DESIGN/ DEVELOP	BUILD	UPGRADE	SUPPORT
WEAPONS	4	Turkey can produce most of the **small arms and large-caliber weapons** used to arm its land and naval platforms, although these tend to be based on **foreign designs**. Its capabilities in more **complex weapons** are maturing, with an increasing number of programs to replace foreign systems such as missiles with **Turkish-designed alternatives**. Turkey is also working on a program to develop a **ballistic missile with a range of 2,000 km**. Nevertheless, munitions remain **one of the main imports** for Turkey.	4	4	4	4
C4ISR	4	Turkey is **increasing the range of its capabilities** in the C4ISR domain. Its industry can independently design and develop systems ranging from radios to radars and electronic warfare systems. While Turkish platforms were originally equipped with foreign sensors, it is now increasingly common for **Turkish alternatives** to be installed instead. Turkish industry has also been tasked with designing an air defense network known as **Steel Dome**, which will exploit **AI** to maintain a real-time operational picture.	4	4	4	4
SPACE	3	While Turkey aspires to be capable of independently launching its own satellites into space by **2030**, as it stands its industry is **reliant on foreign suppliers** for critical components, design assistance, and launch services. There is a growing number of Turkish companies that can develop and produce **microsatellites and satellite payloads**. The contribution of the Turkish domestic industry to the **Göktürk reconnaissance and surveillance satellite** series reportedly increased from **40%** in the Göktürk -1 to **80%** in the Göktürk-2.	3	3	3	2

Sources: Company websites, Aviation Week Analysis, Defense News, Defence Turkey, IISS, Janes

Domestic Capability

Asisguard Website Link
Development and production of small UAVs

Baykar Website Link
Development and production of UAVs and associated subsystems including the Bayraktar TB2 and TB3; Purchased Piaggio Aerospace in December 2024

Kale Aero Website Link
Production of components and subsystems for civil and military aircraft; Formed TAEC JV with Rolls-Royce (2017) and Kale Pratt & Whitney JV (2010)

STM Website Link
Development and production of small UAVs

TAI Website Link
Development, production, and upgrade of helicopters, trainer aircraft, multirole fighter aircraft (including the Kaan next-generation platform), and UAVs; Licensed production of the F-16 fighter aircraft

TEI Website Link
JV formed by TAI and GE Aviation in 1985; Licensed production of aircraft engines including the F110 series

Titra Website Link
Development and production of UAVs and light helicopters



Aselsan Website Link
Development and production of AFV subsystems and UGVs; Upgrade of AFVs

BMC Website Link
Development and production of wheeled and tracked AFVs including the Altay MBT, artillery, logistics vehicles, and AFV powerpacks through its BMC Power subsidiary

FNSS Website Link
Formerly a JV between Nurol Makina and BAE Systems; Now fully-owned Nurol subsidiary; Development, production, and upgrade of wheeled and tracked AFVs, AFV subsystems, and UGVs

Katmerciler Website Link
Development and production of wheeled AFVs and logistics vehicles

MKE Website Link
Development and production of tracked AFVs, AFV subsystems, and artillery

Nurol Makina Website Link
Development and production of wheeled AFVs

Otokar Website Link
Development and production of wheeled and tracked AFVs



Anadolu Shipyard Website Link
Development and production of naval vessels including patrol craft, frigates, and landing craft

ASFAT Website Link
Runs the Turkish Navy's Gölcük and Istanbul Naval Shipyards; Development and production of patrol craft, frigates, the TF-2000 destroyer, MUGEM aircraft carrier, and MILDEN submarine

Dearsan Website Link
Development and production of naval vessels including patrol craft, corvettes, and small submarines

Sedef Shipyard Website Link
Development and production of Anadolu-class LPD in partnership with Navantia and landing craft; Production of I-class frigates

STM Website Link
Development of naval vessels including patrol craft, corvettes, support ships, and submarines

TAIS Website Link
Consortium formed by Anadolu, Sedef, and Sefine Shipyards; Development and production of naval vessels including patrol craft, landing craft, support ships, and floating docks

Sources: Company websites, EDR, Janes

Domestic Capability

Aselsan Website Link
Development and production of air-defense systems, fuzes mortars, medium-caliber ammunition, and torpedoes

Baykar Website Link
Development and production of cruise missiles

Canik Arms Website Link
Development and production of small arms and medium-caliber weapons

MKE Website Link
Development and production of aircraft weapons, bombs, fuzes, medium- and large-caliber weapons, mortars, naval guns, propellant, rockets, small arms, small-, medium-, and large-caliber ammunition

Roketsan Website Link
Development and production of air-defense systems, anti-ship and anti-tank missiles, ballistic missiles, bombs, cruise missiles, multiple rocket launchers, rockets, and torpedoes

Sarsilmaz Website Link
Development and production of small arms

Unirobotics Website Link
Development and production of small- and medium-caliber weapons mounts



Armelsan Website Link
Development and production of sonar systems

Aselsan Website Link
Development and production of avionics, battle management systems, communications systems, EO/IR sensors, EW systems, fire control systems, navigation systems, and radars

Asisguard Website Link
Development and production of communications systems, displays, and EO/IR sensors

Fotoniks Website Link
Development and production of EO/IR sensors

Havelsan Website Link
Development and production of AI, command-and-control systems, computers, cyber security solutions, and simulation and training systems

Meteksan Website Link
Development and production of communications systems, EO/IR sensors, simulators and underwater sensors

Savronik Website Link
Development and production of avionics, communications systems, and simulation systems

Aselsan Website Link
Development and production of civil and military satellite payloads and satellite ground systems

Fergani Space Website Link
Development and production of micro satellites, satellite components, satellite payloads, and orbit transfer vehicles

STM Website Link
Development and production of microsatellites, satellite payloads, and satellite subsystems

TAI Website Link
Development and production of Göktürk-2 and Göktürk-3 earth observation satellites and Türksat 6A telecommunications satellite

Turkey wants to increase the capabilities of its space sector. Although it remains **dependent on foreign suppliers for many components**, its domestic industry has gradually taken on an increasing share of the design and development work for its observation and telecommunications satellites. According to its **National Space Strategy** published in February 2021, the Turkish government aspires to establish its own **international space port** by 2030. which will allow it to **independently launch** its own domestically produced satellites and place a probe on the **moon**.

Sources: CIA World Factbook, Company websites, ISPI

Presence of International Suppliers

The arms embargoes imposed on Turkey by some European countries have encouraged it to diversify its supplier base to include South Korean and – unusually for a NATO country – Russian companies.

Company	Onshore Industrial Presence	Domain: Air	Land	Maritime	Weapons	Cyber /C4ISR	Space	Relationship and Products
Almaz - Antey Corp.	●	○	○	○	●	○	○	Prime contractor for S-400 air-defense system program.
BAE SYSTEMS	●	●	○	○	○	○	○	Subcontractor for Kaan fighter aircraft program. Prime contractor for Typhoon fighter aircraft program. MoU with TAI for collaboration on UAS development. Owned 49% of FNSS JV between 1990 and 2024.
BOEING	●	●	○	○	●	○	○	Prime contractor for GBU-39 SDB and JDAM and 864 GBU-39 precision-guided munitions, CH-47F Chinook helicopter and 737 AEW&C Peace Eagle aircraft programs.
Cummins	●	○	●	○	○	○	○	Supplier of engines for Turkish AFVs including Kirpi, Hizir, and Vuran families of protected patrol vehicles.
GE Aerospace	●	●	○	○	○	○	○	Local industrial presence via GE Aerospace Turkey Technology Center and TEI JV company with TAI; Licensing agreement with TEI for Turkish production of F110 aircraft engine.
Hanwha	●	○	●	○	○	○	○	Licensing agreement with 2nd Main Maintenance Directorate for Turkish production of K9 Thunder self-propelled howitzer as T-155 Firtina.
HYUNDAI Rotem	●	○	●	○	○	○	○	Supplier for Altay main battle tank program.

Sources: Company websites, Aviation Week Analysis, EDR, Flight Global, SIPRI

Presence of International Suppliers

Although Turkey still needs to import certain complex air platforms and weapon systems, most of the defense products it now imports are the subsystems and components needed to equip its domestically designed platforms.

Company	Onshore Industrial Presence	Domain: Air	Land	Maritime	Weapons	Cyber /C4ISR	Space	Relationship and Products
LEONARDO	●	●	○	○	●	●	●	Prime contractor for 15 AW119 Koala helicopter program. Licensing agreement with TAI for production of T129 ATAK attack helicopter. Supplier of Super Rapid 76 mm naval guns for Turkish naval vessels.
LHTEC	●	●	○	○	○	○	○	JV company owned by Honeywell and Rolls-Royce. Supplier of engines for the T129 ATAK attack helicopter program.
LOCKHEED MARTIN	●	●	○	○	○	○	○	Prime contractor for F-16V fighter aircraft program.
Pratt & Whitney An RTX Business	●	●	○	○	○	○	○	Local production of components for aircraft engines including the F100 series at Kale Pratt & Whitney JV company.
RTX	●	○	○	○	●	○	○	Prime contractor for AIM-120A, AIM-9X, and AGM-88E air-launched missile and ESSM Block-2 surface-to-air missile programs.
SNT Dynamics	●	○	●	○	○	○	○	Supplier for the Altay main battle tank program.
THALES	●	○	○	○	○	●	●	Supplier of communication transponder for AYAP-1 satellite by Thales Alenia Space JV. Supplier of SMART and STING radars for integration on MILGEM frigates.

Sources: Company websites, Aviation Week Analysis, Defense News, Defence Turkey



07 PARTNERSHIPS & RELATIONSHIPS

Membership in Relevant Multi-Lateral Alliances, Organizations and International Institutions

Turkey has attempted to use its membership of multinational organizations associated with the Global South to offset its reliance on its increasingly strained relationships with NATO and EU countries.

NATO

Turkey joined NATO in 1952 and relies on the alliance's **collective security guarantees** to provide its strategic defense. Due to its strategic position, Turkey hosts an HQ for a **NATO Land Command** in Izmir and a **Rapid Deployment Corps** in Istanbul. It maintains the **second-largest armed forces in the alliance**, spends more than **2% of GDP** on defense, and regularly trains alongside NATO allies in **multinational exercises.** However, the relationship between Turkey and NATO has come to be characterized by **mistrust** after Turkey launched an operation into **northern Syria** in 2016 and decided to purchase the **S-400 air-defense system** from Russia in 2017. It also has a tense relationship with fellow NATO members **France and Greece** over its claims to territory in the **eastern Mediterranean**. Trust between NATO and Turkey further deteriorated in 2022, when Turkey held up **Sweden's accession** to the alliance by refusing to ratify it until Sweden introduced tougher anti-terror laws aimed at the **Kurdistan Workers' Party (PKK).**

UN

Turkey has been a member of the UN since 1945. It has contributed to **peacekeeping operations** by deploying military and police personnel to various African countries, as well as **Lebanon** and **Kosovo**. While Erdogan's administration has advocated for reform of the United Nations Security Council under the motto the world is **'bigger than five',** Turkey's voting on most issues aligns with EU and other NATO states.

Organization of Islamic Cooperation

Turkey's secular tradition has been weakened under Erdoğan, who wants it to play a **leading role in the Muslim world**. Membership of the OIC supports this by facilitating connections, with Turkish **trade** to Muslin-majority nations having increased by more than **US$60 billion** between 2002 and 2018. However, some Muslims resent Turkey's support for the **Muslim Brotherhood** during the Arab Spring.

OTS

The Organization of Turkic States encourages cooperation in defense, energy, trade and transport between states with a predominantly **Turkic population**. Its members include Turkey's close ally, **Azerbaijan**, and the unrecognized **Turkish Republic of North Cyprus (TNRC)**. Turkey could use its dominant position in the organization to convince other members to extend their **recognition of the TNRC**, thereby bolstering its legitimacy.

BRICS

Turkey **applied to join the China-led BRICS in October 2024**, having reportedly been interested in joining since 2018. This reflects its desire to be seen as a **bridge between the West and the 'Global South',** as well as its need for increased **Chinese investment** to stabilize its ailing economy. However, Turkey's application is understood to have been **blocked by India** due to Turkey's support for Pakistan's position on the disputed **Kashmir territory**.

EU

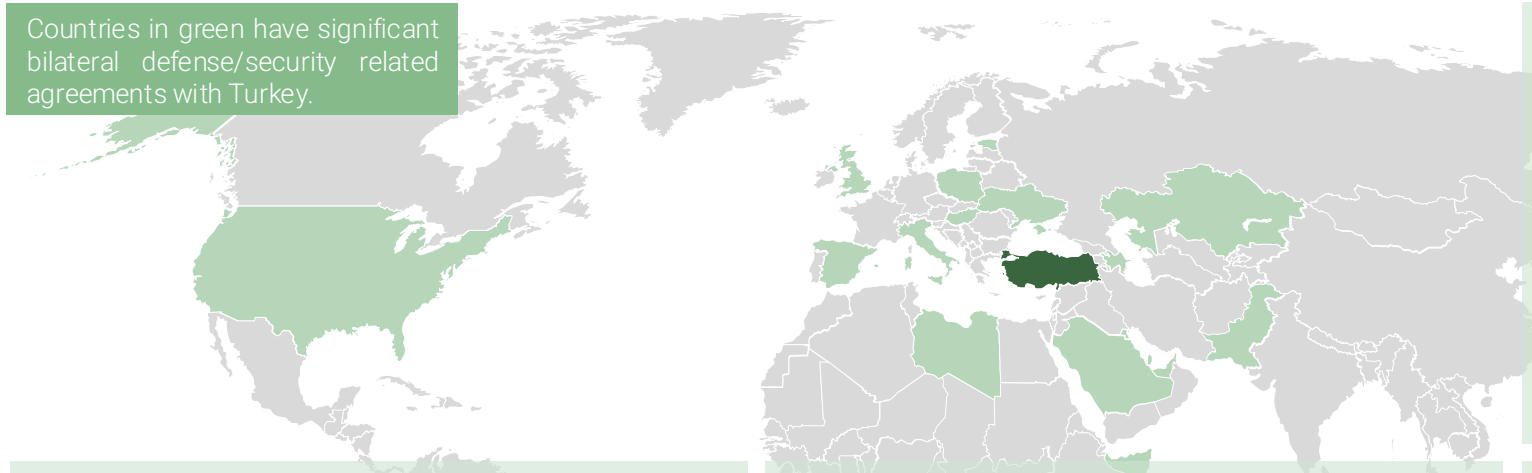
Turkey became an associate member of the EU Community in 1963 and **began formal accession talks in 2005**. It has had a **customs union** with the bloc since 1995, which has led to **millions of Turks emigrating** to other EU countries. With more than **three million Syrian refugees** having entered Turkey after the Syrian Civil War began in 2011, the EU formulated an **agreement with Turkey** to prevent them from crossing into other European countries in 2016. However, Erdoğan's adoption of a more assertive foreign policy, issues with EU member **Cyprus**, threats to overturn the 2016 refugee agreement, and fears that his presidency was becoming more **authoritarian** led to **accession prospects being frozen in 2018.** While EU membership is now highly unlikely, Turkey has expressed a desire to join the EU's **PESCO Military Mobility Project** and other military cooperation programs, but the EU Commission stated in 2023 that Turkey only satisfies **10%** of its **Common Security & Defense Policy** criteria.

Sources: Atlantic Council, Cairo Review of Global Affairs, Centre for Eastern Studies, CFR, CIA World Factbook, CRS, FOI, IISS, Journal of Balkan and Near Eastern Studies, MEI, MFA, RUSI, SWP, US DoD, Wilson Center

Bilateral Defense Relationships

Turkey's divergence from Western countries on key foreign policy issues has undermined its bilateral defense relationships and defense industrial cooperation with the US and some – though not all – European states.

Countries in green have significant bilateral defense/security related agreements with Turkey.



United States

The US considers Turkey to be a **key security partner in the Black Sea** region. US troops are stationed at multiple locations within Turkey, including **Incirlik Air Base**, which also houses up to **50 US nuclear bombs**. The US is also one of Turkey's **primary suppliers of military equipment**, having approved a US$23 billion sale of the **F-16V fighter aircraft** in January 2024. Nevertheless, foreign policy differences have strained the relationship between the US and Turkey. The US has sanctioned Turkey over its purchase of the Russian **S-400 air-defense system** and its failure to prevent Turkish companies from supplying of **sensitive technologies** to Russia after the invasion of Ukraine in February 2022.

United Kingdom

The UK and Turkey signed a **military cooperation agreement** in 2011 and an **agreement on sharing sensitive information** in 2016. There are also strong ties between the British and Turkish defense industries. For example, **BAE Systems** was awarded a contract in 2017 to assist with development of Turkey's **Kaan fighter aircraft** and owned 49% of Turkey's **FNSS JV** company until Nurol Group bought the shares back in 2024. These ties were bolstered by a **statement on defense cooperation** published in November 2023, which resulted in an £8 billion sale of the Typhoon fighter aircraft to Turkey and **greater security cooperation** between Turkey and the UK in the **Eastern Mediterranean and North Africa**.

Ukraine

Turkey has strengthened its relations with Ukraine since Russia's initial invasion in 2014. Both countries have a mutual interest in **countering Russian power in the Black Sea** and in **defense industrial cooperation**. Under a **military cooperation agreement** signed in October 2020, Turkey is producing at least two **corvettes** for the Ukrainian Navy, the first of which began sea trials in 2024. Turkish company **Baykar** also started construction of a **factory in Ukraine** to produce TB2 or TB3 UAVs in February 2024. More than two years after it was originally signed, Turkey also ratified a **free trade agreement** between the two countries in October 2024.

Italy

Italy signed **nine bilateral agreements** with Turkey in July 2022, including one on **closer defense industrial cooperation**. As one of Turkey's primary arms suppliers, Italy has supported **licensed production** of its designs in Turkey and supplied **subsystems** for integration into Turkish platforms. The industries of both countries have also forged closer ties. In December 2024, Turkish company **Baykar** announced it would acquire the Italian company **Piaggio Aerospace**. It subsequently formed the **LBA Systems** JV with Leonardo in June 2025. This suggests that unlike with other European countries, foreign policy differences are unlikely to derail Italo-Turkish defense cooperation.

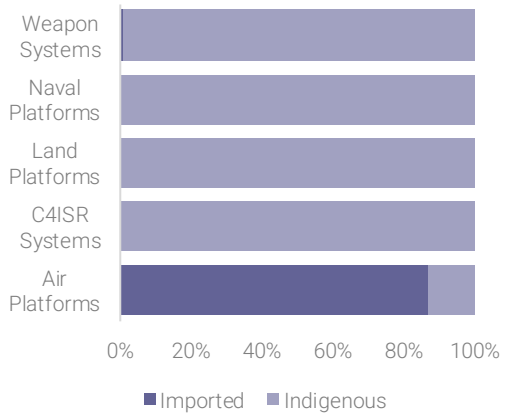
Sources: AA, Atlantic Council, CIA World Factbook, CRS, Defense News, EDR, FOI, FT, IISS, MFA, Naval News, Reuters, UK Government

Trade Relationships

Turkey is building up its defense industry to reduce its dependence on arms imports and increase its share of arms exports.

DEFENSE TRADE

Imported vs Indigenous Contracts
2023-25 (US$m)



Exports
2025

Brazil
- 200 Canik M2HB machine guns

Chile
- 2 ADVENT CMS C4ISR systems

Indonesia
- 48 Kaan fighter aircraft
- 2 Milgem-class frigates

Spain
- 30 Hurjet trainer aircraft

According to the Turkish government, Turkish defense and aviation exports totaled approximately **US$10.05 billion** in 2025, representing a **48% increase** compared to 2024. Turkey has made inroads into **new markets**, including Africa, Asia, Europe, and the Gulf. Its most popular exports include **UAVs** (notably the Bayraktar TB2), **light armored vehicles**, and **light aircraft**. Major exports recorded in 2025 include the sale of 48 Kaan fighter aircraft to Indonesia and 30 Hürjet training aircraft to Spain. Factors contributing to the success of Turkish products are their **affordability** combined with compliance with **Western standards**, **lack of end-user restrictions**, and their **proven combat record**.

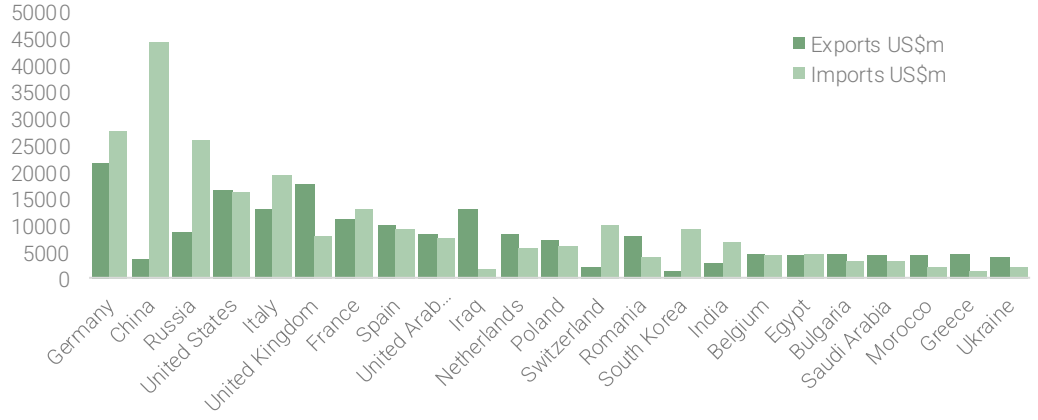
Sources: AA, Aviation Week DMA, Atlantic Council, Carnegie Endowment, Defense News, FOI, IISS, OEC, SIPRI, SWP

WIDER TRADE

In 2024, Turkey exported a total of US$270b worth of goods including:
- 12.7% Cars, tractors, and trucks – US$34.3b
- 10.1% Machinery – US$27.1b
- 6.14% Electrical machinery – US$16.5b
- 5.99% Mineral fuels - US$16.2b
- 5.09% Precious stones – US$13.7b
- 4.18% Knitted clothing – US$11.3b

In 2024, Turkey imported a total of US$313b worth of goods including:
- 12.8% Machinery – US$40.1b
- 11.0% Mineral fuels – US$34.5b
- 10.5% Cars, tractors, and trucks – US$32.7b
- 8.68% Electrical machinery – US$27.1b
- 7.44% Iron and steel – US$23.3b
- 7.39% Precious stones– US$23.1b

Top 20 Destinations/Sources for Exports and Imports 2024
Source: Observatory of Economic Complexity



Key Partners & Suppliers

Some Western countries that were previously among Turkey's main suppliers, such as Canada, Germany, and the Netherlands, imposed arms embargoes on Turkey after its invasion of Syria in 2016.

Country	Company	Product	Year	Notes
US	Lockheed Martin	F-16V Fighter Aircraft	2024	40 ordered (est.).
	Northrop Grumman	AGM-88E AARGM	2024	96 ordered (est.).
	Northrop Grumman	APG-83 SABR	2024	10 ordered (est.) for F-16V fighter aircraft.
	Lockheed Martin	AAQ-33 Sniper Targeting Pod	2024	16 ordered (est.) for F-16V fighter aircraft.
Italy	Leonardo	AW119 Koala Helicopter	2021	15 ordered.
	Leonardo	T-129B ATAK Helicopter	2008	92 ordered (est.). Produced under license by TAI.
	Leonardo	Super Rapid 76 mm Naval Gun	2005	4 delivered for MILGEM frigates between 2011 and 2019.
Russia	Almaz-Antey	S-400 Triumf Air-Defense System	2017	Two systems ordered (est.).
	KBP Instrument Design Bureau	9M133 Kornet Anti-Tank Missile	2018 (est.)	1,600 ordered (est.).
United Kingdom	BAE Systems	Eurofighter Typhoon Fighter Aircraft	2025	20 ordered.
	BAE Systems	Kaan Fighter Aircraft Design Consultancy	2017	Design consultancy services provided to TAI for development of the Kaan next-generation fighter aircraft.
South Korea	SNT Dynamics	EST15K Tank Transmission	2023	90 ordered for Altay MBTs in 2023. Contract includes an option for an additional 150.
	Hyundai Rotem	Altay Tank Design Consultancy	2008	Design consultancy and technology transfer provided for Altay MBT program.

Sources: Aviation Week DMA , SIPRI

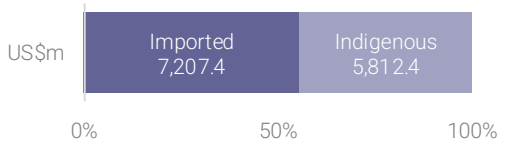
Trade – Procurement Contracts and Exports

These contracts are a snapshot of contracts awarded between 2023 and 2025 that are tracked in Aviation Week's Defense Market Analyzer – Global Defense Contracts.

Major Turkish Procurement Contracts
2023-25 Total Value

US$13.0b

Turkish Procurement Contracts by Source
2023-25 by Value



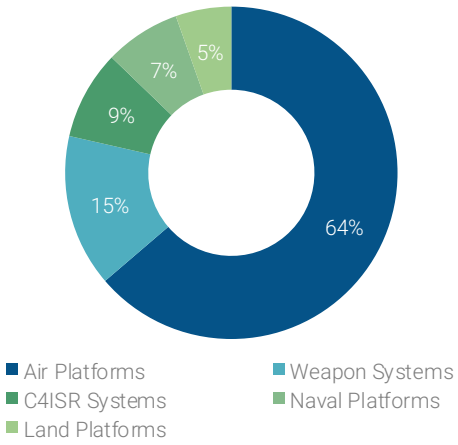
Major Turkish Procurement Exports
2023-25 Total Value

US$17.6b

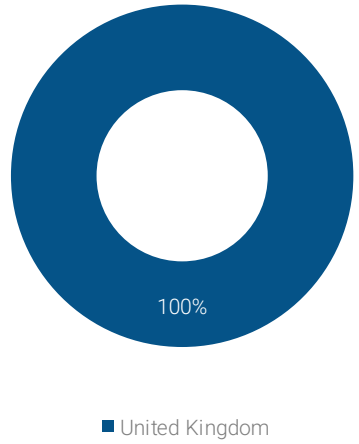
Top 10 Turkish Procurement Contracts
2023-25 (US$ million)

1	Eurofighter Typhoon Fighter Aircraft	BAE Systems	7,207m
2	Air Defense Systems	Aselsan	1,931m
3	ALP-300G Air Search Radars	Aselsan	900m
4	Hurkus B Trainer Aircraft	TAI	478m
5	Altuğ 8×8 Wheeled Armored Vehicle	BMC	379m
6	T625 Gökbey Transport Helicopter	TAI	350m
7	Pars Alpha Wheeled Armored Vehicle	FNSS	327m
8	Istanbul-class Frigate	Anadolu Shipyard	320m
9	Istanbul-class Frigate	Sedef Shipbuilding	320m
10	Istanbul-class Frigate	Sefine Shipyard	320m

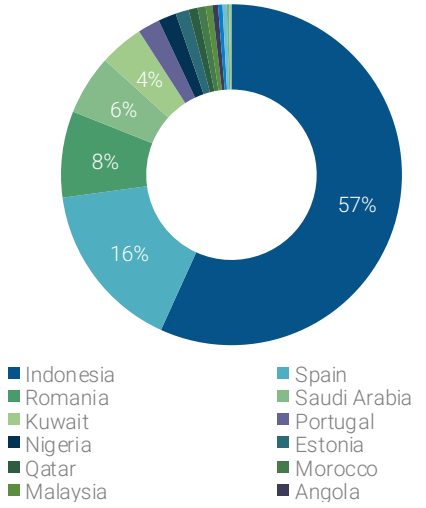
Major Turkish Procurement Contracts
2023-25 by Market Segment



Major Procurement Import to Turkey
2023-25 by Supplier



Major Procurement Exports from Turkey
2023-25 by Customer



Sources: Aviation Week DMA Global Defense Contracts

Export Controls

Turkey nominally adheres to global export controls, but it has been accused of circumventing UN arms embargoes and global sanctions when these obstruct its foreign policy interests.

Key Global Export Control Regimes

Wassenaar Arrangement
MEMBER

MTCR
MEMBER

Nuclear Suppliers Group
MEMBER

The Australia Group
MEMBER

EU Export Controls
MEMBER

Zangger Committee
MEMBER

Turkey is **party to all major export control regimes and non-proliferation agreements**, although it has **yet to ratify the ATT**.

Turkish companies wishing to export arms and related technologies, strategic technologies, and dual-use goods require a **license** from the Turkish government. The export of arms and related technology is regulated by the **Ministry of National Defense (MSB),** which issues an **annual control list** detailing which goods require a license to export. If the **Ministry of Trade** receives an application to export goods on this list, it directs the seller to the MSB so that it can apply for the appropriate license. An application must also contain an **end-user certificate**. Decisions on whether to grant a license are then made on a **case-by-case basis**.

Despite its professed adherence to international regimes, Turkey was accused of flouting the **arms embargo** imposed on **Libya** in 2011 by supplying its government with arms. Turkey has also been accused of facilitating the flow of **sanctioned dual-use goods to Russia**.

Non-Proliferation Agreements

Arms Trade Treaty (ATT)
NON-MEMBER

Nuclear Non-Proliferation treaty (NPT)
MEMBER

Chemical Weapons Convention (CWC)
MEMBER

Biological and Toxin Weapons Convention (BTWC)
MEMBER

Convention on Certain Conventional Weapons (CCW)
MEMBER

Convention on the Prohibition of Anti-Personnel Mines (Ottawa Convention)
MEMBER



Personnel participating in a CBRN exercise held between November and December 2024. Credit: @tcsavunma via X

Sources: European Parliament, FT, Ministry of Foreign Affairs, Ministry of Trade, OSCE, Reuters, UN, US Department of Commerce

Useful Information – Trade Associations

Trade Associations

The main trade association for Turkish aerospace and defense companies is the **Defense and Aerospace Industry Manufacturers Association (SASAD).**

Founded in 1989, SASAD's objective is to **reduce the dependency** of Turkish industry on foreign suppliers, **increase the competitiveness** of the Turkish industry on the global market, strengthen cooperation within Turkish industry, and to support the growth of the industry, including its **SMEs**.

It represents more than **270** Turkish companies and institutions separated into seven clusters. SASAD also represents Turkey in the **Aerospace, Security, and Defense Industries Association of Europe**.

SASAD publishes annual reports containing statistics on the performance of the Turkish defense and aerospace industry, directories with details of its members, and links to relevant legislation and presentations.

+90 (312) 426 22 55 sasad@sasad.org.tr



The Turkish Stars aerial display team performing at the World Defense Show in February 2024. Credit: U.S. Air Force courtesy photo

Trade Shows

The **International Defense Industry Fair (IDEF)** is a biennial defense exhibition organized by the **Turkish Armed Forces Foundation (TSKGV).** According to official statistics published by its organizers, **1,491 exhibitors** from 49 countries, **121,753 visitors**, and **229 delegations** attended the exhibition in 2025.

The 18th edition of the event will be held between **3 and 9 May 2027** at the Istanbul Expo Center and Atatürk Airport.

+90 (224) 294 85 50 info@kfa.com.tr

The **SAHA Expo** is another biennial defense and aerospace exhibition organized by the SAHA Istanbul industrial cluster. It claimed to have attracted **150,000 visitors** from more than 124 countries, **1,400 companies**, and 400 official delegation members in 2024.

The fifth edition of the event will be held between **5 and 9 May 2026** at the Istanbul Expo Center.

info@sahaexpo.com

Sources: Organization Websites

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