Turkish News

News provided by:
Irem Yaren BAYSAL,
Editor of Fastener Eurasia Magazine
www.fastenereurope.com

Turkish Fastener Industry 2026 Outlook: Position, Competition and Transformation in the European Supply Chain

As the Turkish fastener industry enters 2026, it is positioning itself not merely on volume, but on speed, flexibility, lead time and technical capability within the European supply ecosystem. While global fastener markets remain highly competitive in tonnage terms, **Türkiye's competitive edge lies in its geographic proximity to the EU, deep integration with automotive and machinery industries, and a broad manufacturing base capable of serving medium-to-high value-added segments.**

Trade Landscape: HS 7318 and Türkiye's Global Standing

Under HS 7318 (iron and steel fasteners such as bolts, nuts, screws, washers and rivets), Türkiye maintains a visible presence in international trade statistics. According to global trade data sources, Türkiye ranked among the top exporting nations of iron fasteners in 2024, with export volumes exceeding USD 800 million, placing it around 12th globally. Although fasteners represent a relatively small share of Türkiye's total exports (approximately 0.3% in HS classification terms), the sector holds strategic importance due to its integration with high-value industries such as automotive and machinery.

At the same time, Türkiye also imports fasteners in the range of approximately USD 700 million annually. This dual structure indicates that **while Türkiye exports competitive and specialized fastener products, it continues to import certain categories—particularly standard or cost-driven segments—depending on price dynamics and product specifications.**

Automotive as the Primary Demand Engine

The most decisive driver for Türkiye's fastener sector remains the automotive industry. With total vehicle production reaching 1,419,464 units in 2025 and automotive exports amounting to 1,057,920 units, generating USD 41.5 billion in export revenue, the scale of the ecosystem directly influences fastening demand.

Automotive requirements elevate industry standards across the fastener supply chain, particularly in:

- *High-strength property classes (8.8, 10.9, 12.9 and above)*
- *Structural and safety-critical components*
- *Advanced corrosion-resistant coatings (including zinc flake systems)*
- *Full traceability and process validation under IATF 16949*

In 2026, competition is increasingly defined not by price alone, but by quality consistency, delivery performance and engineering support capability.

Nearshoring Advantage in the European Market

As European manufacturers continue diversifying supply chains and reducing dependence on single sourcing, Türkiye's geographic proximity offers measurable advantages. **Shorter transit times, reduced inventory requirements and faster engineering revisions make Türkiye an agile alternative for EU buyers.**

Energy cost volatility and production capacity constraints in parts of Europe further reinforce Türkiye's positioning as a complementary manufacturing hub within the regional supply chain.

Steel, Cost Structure and Sustainability Pressure

Fastener production is highly sensitive to steel wire rod pricing and energy costs. Developments in Türkiye's steel production directly affect the competitiveness of downstream fastener manufacturers. With national crude steel production exceeding 28 million tonnes in the first nine months of 2025 and continued monthly output above 3 million tonnes, supply continuity remains relatively stable.

Sustainability considerations are increasingly central. Even where fasteners are not directly targeted under carbon border regulations, automotive and industrial OEMs increasingly request Scope 1 and Scope 2 emissions data from suppliers. As a result, energy efficiency, renewable electricity sourcing and carbon accounting practices are becoming standard requirements within export-oriented fastener firms.

Technology and Automation as Differentiators

Investment momentum continues in cold forming lines, optical sorting systems and automated packaging solutions. European-bound manufacturers are aligning operations with near-zero defect targets, implementing camera-based inspection systems, digital traceability and batch-level documentation systems to meet OEM audit requirements.

The transition is not limited to machinery upgrades; it includes broader process digitalization and quality data management systems that strengthen long-term customer integration.

From Volume to Value: How Türkiye, Taiwan and China are Shaping the 2026 Fastener Landscape

The global fastener industry in 2026 is no longer defined solely by production volume. Instead, it reflects differentiated regional strengths.

China continues to lead in large-scale standard fastener production and competitive pricing. Taiwan maintains its global reputation for precision fasteners and high-mix manufacturing flexibility. Turkey, positioned geographically between Asia and Europe, is increasingly focusing on high-strength bolts, automotive-certified production and reduced lead times for EU markets.

Rather than displacing Asian suppliers, Turkey's investment wave in cold forming, coating and digital quality control reflects a broader diversification of supply chains. European buyers are increasingly adopting dual- or multi-region sourcing strategies, integrating suppliers from Taiwan, China and Turkey depending on product complexity and delivery requirements.

This shift suggests that 2026 will be characterized less by regional rivalry and more by structural rebalancing within the global fastening ecosystem.

Investment Momentum Continues in Turkish Cold Forming and Coating Capacity

Türkiye's fastener supply base is entering 2026 with a clear investment narrative: manufacturers and surface-treatment specialists are scaling up not only capacity, but also process stability, automation, corrosion performance, and OEM-grade compliance. The strongest investment signal is coming from two linked areas—cold forming / forging modernization and high-performance coating capacity, especially zinc flake systems increasingly demanded by automotive and heavy-duty applications.

A major driver behind this investment cycle is the growing requirement for repeatable quality, traceability, and higher corrosion performance from European and global OEMs. In practice, that means more multi-station forming capability, tighter process control, upgraded heat treatment, and coating technologies that deliver high corrosion resistance while minimizing risks such as hydrogen embrittlement in high-strength fasteners.

Coating Capacity: Zinc Flake and OEM-grade Surface Engineering

On the coating side, Türkiye's market is seeing continued emphasis on zinc flake and advanced systems used widely in automotive. Norm Coating has highlighted investment in rack dip-spin zinc flake coating technology, positioning it as a method that prevents thread damage and delivers high corrosion resistance with a thinner layer and without hydrogen embrittlement risk—particularly relevant for chassis-related coatings.

Norm Coating's investment agenda has also been tied to broader industrial coating infrastructure, including a new factory project announced with 20,000 m² open area and 14,000 m² closed space, and planned capabilities such as wet painting, powder coating, e-coating, rack galvanizing, and zinc alloy coating—illustrating how **Turkish coating players are expanding beyond "fasteners-only" lines into broader metal component finishing ecosystems.**

Other Turkish surface-treatment operators have similarly positioned themselves around zinc flake growth. Tekno Metal Kaplama's coating-line investments include a zinc flake coating line and subsequent fully automatic zinc alkaline and zinc nickel coating lines, with the company also referencing IATF 16949 quality certification—an important signal for automotive-facing coating capacity.

Cold Forming and Forging: Modernization Plus Process Reliability

On the manufacturing side, **Turkish fastener producers are pairing capacity expansion with deeper digitization and tighter process control.** A recent industry interview with Kaleliler Cıvata described 2025 as a year focused on "digital transformation and capacity growth," citing roughly 12% tonnage growth vs. 2024, alongside investments in new forging lines aimed at improving speed and precision for large-diameter bolts and the integration of new-generation, energy-efficiency-focused heat treatment furnaces.

Kaleliler also framed automation and traceability as part of an integrated production strategy—tracking the process from raw material acceptance through packaging and emphasizing in-house testing capability—an approach increasingly mirrored across export-oriented Turkish fastener makers serving safety-critical and high-strength segments.

Capacity disclosure from sustainability reporting also reflects the scale of some Turkish producers. A sustainability report published by Mita Civata states total production capacity of 61,500 tonnes/year, including 48,500 tonnes/year cold-forged bolt capacity and 9,600 tonnes/year nut forging capacity, indicating that Türkiye hosts producers operating at substantial industrial scale with diversified forging portfolios.

Meanwhile, capacity additions are also visible among specialized cold-forming manufacturers expanding factory footprints and output. Teknoform, for example, has been reported as targeting 6,000 tonnes/year production capacity at a new factory and producing fasteners via cold forging within a stated diameter range (e.g., M5–M22), underscoring the continued investment appetite in cold forming capability and product breadth.

What These Investments Mean for International Buyers

Taken together, these investments point to a Turkish fastener ecosystem that is increasingly optimized for OEM-grade supply expectations, particularly in Europe-adjacent procurement strategies. Coating investments (zinc flake and associated masking/adhesive coatings, plus laboratory and process-control additions) directly support higher corrosion performance and assembly reliability, while cold forming/forging modernization supports tighter tolerances, higher strength classes, and more consistent delivery performance.

For buyers, the practical outcomes are shorter lead-time options in many categories, a maturing base of coating capacity aligned with automotive needs, and an industry that is actively building out quality assurance infrastructure—ranging from digitized process monitoring to in-house testing and traceability capabilities.

Türkiye's Automotive Industry Results for 2025

In 2025, while total automotive production increased by 4% compared to the previous year, automobile production decreased by 4%. During this period, total production reached 1,419,464 units, while automobile production stood at 872,538 units.

In 2025, the total market increased by 10% year-on-year, reaching 1,413,903 units. In the same period, the automobile market increased by 11% compared to the previous year, reaching 1,084,496 units.

Within the commercial vehicle group, production increased by 19% in 2025; light commercial vehicle production rose by 21%, while heavy commercial vehicle production increased by 1%. In 2025, compared to the previous year, the commercial vehicle market increased by 8%, the light commercial vehicle market increased by 10%, while the heavy commercial vehicle market decreased by 4%.

Total automotive exports increased by 4% year-on-year on a unit basis, while automobile exports decreased by 8% in 2025. During this period, total automotive exports reached 1,057,920 units, while automobile exports stood at 599,687 units.

According to data from the Turkish Exporters Assembly (TİM), total automotive exports increased by 12%, reaching USD 41.5 billion in 2025. According to data from the Uludağ Automotive Industry Exporters' Association (OİB), automobile exports increased by 4%, reaching USD 11.8 billion. ■