Türkiye's Rise as a Defence Exporter
An Assessment and Its Implications for India

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Over the past two decades, Türkiye has transitioned from a defence import-dependent state to a competitive exporter by combining strategic state direction, private sector innovation, and the operational validation of its platforms in conflict environments. Based on an analysis of defence export data, institutional evolution and sectoral case studies, this article argues that Türkiye's export success is driven by the interplay among institutional coordination, sustained public investment and an adaptive industrial ecosystem. It further shows how Türkiye has leveraged niche strengths in unmanned systems, naval platforms and land systems, along with flexible financing and fewer political conditionalities, to expand into markets across South Asia, West Asia, Central Asia, Azerbaijan and Africa.

Drawing insights for India, the article suggests that while elements such as export orientation, public–private synergy and battlefield-tested systems offer useful lessons, differences in institutional structures and strategic context constrain direct replication, underscoring the need for a calibrated and context-specific approach to ensure defence industrial development.

Keywords: *India; Defence Exports; Defence Industrial Ecosystem; Türkiye; Unmanned Aerial Systems*

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Introduction

In the evolving landscape of the global arms trade, the emergence of new supplier states represents one of the most consequential shifts of the post-Cold War era. Among these rising defence exporters, Türkiye's trajectory stands out as particularly instructive. Once almost entirely dependent on the Western suppliers for its military requirements, Türkiye has, over two decades of sustained policy intervention, transformed itself into a credible arms exporter with a growing global market share. Empirically, Türkiye's defence and aerospace exports rose from approximately US$ 4.4 billion in 2024 to over US$ 10 billion in 2025,[1] representing a more than two-fold year-on-year rise. This transformation reflects not only an expansion in export volumes, but a broader strategic shift in how states leverage defence production for geopolitical influence.

According to the Stockholm International Peace Research Institute (SIPRI), Türkiye ranked 11th among the world's largest arms exporters during 2021–2025, with its share of global arms exports rising from 0.9 per cent in 2016–2020 to 1.8 per cent in 2021–2025, reflecting a 122 per cent change in volume of the total arms exports between the two periods.[2] The top recipients of Turkish arms in this period were Pakistan (16 per cent), the UAE (12 per cent) and Ukraine (8.4 per cent). In contrast, Türkiye ranked 24th globally in arms imports, with its share declining from 1.5 per cent in 2016–2020 to 1.2 per cent in 2021–2025, representing a 9.7 per cent decrease over the two periods. Taken together, these trends indicate a structural shift from import dependence towards export-oriented production, albeit from a relatively modest global base.

This transformation has not occurred in a vacuum. It reflects a convergence of strategic necessity, political will, institutional design, and a favourable operational context that provided Turkish platforms with extensive combat validation. The 2020 Nagorno-Karabakh conflict— where Azerbaijani forces equipped with Bayraktar TB2 unmanned aerial vehicles (UAVs) significantly altered the battlefield dynamics—served as a global demonstration of Turkish defence technology.[3] The conflict contributed to making the TB2 one of the most sought-after military systems in the world, cementing Türkiye's emergence as a major exporter. Operational deployment in such conflicts has functioned as a credibility-enhancing mechanism, reducing uncertainty for potential buyers.

The India–Türkiye relations introduce an additional layer of complexity. Bilateral ties have historically been overshadowed by Türkiye's close

alignment with Pakistan, Ankara's vocal positions on the Kashmir issue, and divergent strategic orientations. Yet both nations are classified as significant middle powers pursuing strategic autonomy and self-reliance in defence. An analytical engagement with Türkiye's export ascendancy is, therefore, relevant not only as a study of a competitor in third markets but also as a source of policy-relevant insights.

A central puzzle that emerges from Türkiye's trajectory is not merely the scale of its export growth, but the relative speed and coherence with which defence industrialisation has translated into sustained export competitiveness. Within two decades, Türkiye has integrated institutional reform, private sector participation, and operational validation into a relatively cohesive, export-oriented ecosystem. This raises an important analytical question: what explains the effectiveness of Türkiye's defence industrial model, and to what extent are its underlying drivers context-specific or adaptable to other emerging defence-industrial states? This article argues that Türkiye's export success is best understood as the outcome of coordinated state strategy, private sector dynamism, and the alignment of industrial development with external market opportunities.

In this regard, India presents a particularly relevant comparative context. Like Türkiye, India has pursued policies to enhance defence self-reliance, strengthen domestic industrial capacity, and expand exports. India's initiatives, such as positive indigenisation lists and targeted export promotion measures, reflect a growing policy emphasis on building an internationally competitive defence manufacturing base. However, despite notable progress, India's transition from a predominantly import-dependent system to a major exporter remains a work in progress, constrained by institutional fragmentation, procurement inefficiencies and technological gaps.

This article does not seek to draw direct equivalence between the two countries, given the differences in their strategic environments, threat perceptions and industrial legacies. Rather, it approaches Türkiye's experience as an analytically instructive case, one that offers insights into how a middle power has leveraged policy coherence, technological adaptation, and geopolitical positioning to expand its presence in the global defence markets. By examining the Turkish model through this lens, the study aims to identify specific practices and structural features relevant to India's evolving defence export strategy, while recognising the need for contextual adaptation.

Analytically, this study adopts a conceptual lens that views defence industrialisation not merely as a process of import substitution, but as an evolving interaction between state capacity, industrial policy and external

market engagement. In this framework, successful defence exporters are understood to transition from dependence-driven acquisition models to export-oriented production ecosystems, where domestic capability development is closely aligned with international market opportunities.

For analytical purposes, this article conceptualises Türkiye's trajectory as an export-oriented techno-nationalist model, characterised by strong state coordination, an enabling environment for private sector participation, and the strategic alignment of domestic capability development with external market opportunities. While not a formally codified category, this formulation draws conceptually on broader literatures on techno-nationalism and developmental state-led industrialisation, particularly in sectors where technological capability and national security are closely intertwined. At the same time, the analysis recognises that specific geopolitical and institutional contexts shape such models.

This study is based on qualitative analysis supported by descriptive quantitative data drawn from sources such as the SIPRI, official Turkish policy documents, industry reports and open-source defence analyses. It adopts a case-based approach to examine Türkiye's defence-industrial transformation and export expansion, using quantitative indicators, such as export volumes, market shares and firm-level data, to substantiate broader analytical trends. The analysis is explanatory and focuses on identifying interactions among institutional, industrial and geopolitical drivers. A limited comparative perspective is employed to derive policy-relevant insights for India, while recognising differences in strategic context and institutional design. The findings are, therefore, indicative and policy-oriented.

This article is structured as follows. It first traces the historical and institutional dimensions of Türkiye's defence industrialisation. It then examines the key drivers and platforms underpinning export growth. The geopolitical dimensions of Türkiye's arms exports are subsequently analysed. The author then assesses the implications for India across competitive, diplomatic and policy-learning dimensions before concluding with broader reflections.

From Import Dependence to Export Capacity: Türkiye's Defence Industrial Progress

In the early 2000s, Türkiye's defence sector was characterised by a high degree of external dependence, with the bulk of its military requirements sourced from the United States (US) and Western European suppliers.

While North Atlantic Treaty Organization (NATO) membership facilitated access to advanced military technologies, it also exposed Türkiye to structural vulnerabilities. These included supply disruptions, technology transfer restrictions, and political conditionalities embedded within defence partnerships.[4] This dependence constrained indigenous capability development and limited strategic flexibility in procurement and operations, particularly in time-sensitive contexts.

The roots of this strategic concern can be traced to earlier experiences, most notably the 1975–78 US arms embargo imposed following Türkiye's military intervention in Cyprus.[5] The embargo disrupted access to critical equipment and spare parts, undermining operational readiness and highlighted the risks of excessive reliance on external suppliers. Over time, this incident became central to Turkish strategic thinking, reinforcing the imperative to reduce external dependence and develop indigenous defence capabilities.

In response to these structural vulnerabilities, Türkiye initiated a series of institutional measures to build a domestic defence industrial base. A key milestone in this process was the enactment of Law No. 3238 in 1985, establishing the institutional framework for defence industrial development through the creation of dedicated administrative and financial mechanisms. As per Law No. 3238, Türkiye's defence industrial institutional framework initially took shape as the Defence Industry Development and Support Administration (SaGeB) under the Ministry of National Defence. It was mandated to formulate and implement policies to build a national defence industrial base through newly created mechanisms endowed with the requisite authority. In 1989, SaGeB was restructured into the Undersecretariat for Defence Industries (SSM), reflecting an expansion and consolidation of its functions. A significant institutional shift occurred in December 2017 when the SSM was brought under the authority of the Presidency of the Republic of Türkiye. It was subsequently re-designated as the Presidency of Defence Industries (SSB) in 2018, marking its evolution into a centralised body to oversee defence industrial policy and procurement.[6]

The political will to accelerate indigenisation intensified considerably under the Justice and Development Party (AKP) government from 2003 onwards. The March 2003 decision of the Turkish parliament to reject a motion permitting the deployment of US forces on Turkish territory for the Iraq War[7] marked a notable strain in bilateral relations. It underscored the limits of strategic alignment to Ankara.

A further illustration of the fragility of defence cooperation between Türkiye and the US is the suspension of a longstanding intelligence-sharing

arrangement targeting the Kurdistan Workers Party (PKK). In 2020, Washington reportedly halted a covert programme, operational since 2007, that involved intelligence collection using unarmed drones to monitor PKK positions in northern Iraq.[8] The decision followed Türkiye's October 2019 cross-border military incursion into Syria and reflected the deepening strategic divergences between the two NATO allies. The termination of this cooperation not only underscored the political conditionality embedded in intelligence and defence partnerships but also imposed operational challenges for Ankara by increasing the difficulty and cost of its counter-PKK campaign. It gave momentum to Turkish strategic circles to accelerate their efforts to rely more on domestically developed surveillance and drone capabilities.

Moreover, Türkiye's April 2017 agreement with Russia to procure the S-400 air-defence system[9] further illustrates these dynamics. Deliveries of the system began in July 2019. However, the S-400 was not integrated into NATO's integrated air and missile-defence architecture.[10] The procurement prompted the US to remove Türkiye from the F-35 programme in 2019. Subsequently, in December 2020, the US imposed sanctions on Türkiye's Presidency of Defence Industries (SSB) under Section 231 of the Countering America's Adversaries Through Sanctions Act (CAATSA) for its acquisition of the S-400.[11] As of July 2026, Türkiye's Ministry of National Defence stated that work on the S-400 long-range regional air and missile-defence systems was continuing in multiple dimensions,[12] but provided no details on their operational status or a timeline for further action. Rather than simply reducing Türkiye's dependence on Western defence technology, the S-400 case exemplifies a paradox of strategic autonomy, because an effort to diversify defence partnerships generated costs and constraints that continued to make access to the Western-origin platforms and technologies strategically important.

By the early 2000s, approximately 80 per cent of Türkiye's defence requirements were met through foreign sources, reflecting the depth of its external dependence. Over time, this structure underwent a major structural transformation in defence production, with the localisation rate reaching around 80 per cent by 2023.[13] This shift has been accompanied by the expansion of a broad industrial ecosystem, encompassing over 3,500 firms, more than 1,400 active projects, and a workforce of approximately 100,000 personnel.[14] Central to this transformation has been the deliberate cultivation of a domestic defence-industrial base comprising both state-owned enterprises and private sector champions.

Turkish Aerospace Industries (TAI) has led development in the aviation and space domains, while Aselsan, a publicly owned but commercially operated electronics and communications firm, reportedly became the first Turkish firm to surpass US$ 30 billion in market capitalisation in January 2026.[15] This growth reflects its strong export-led strategy and focus on advanced technologies. These developments signal a shift towards higher value-added production and export-oriented industrial scaling.

According to the *Defense News* Top 100 (2026), five Turkish firms featured among the world's leading defence companies, reflecting the sector's steady global integration. Aselsan ranked highest at 40th, followed by TAI (48th), Arca Defense (53rd), Roketsan (64th), ASFAT (78th), and MKE (81st), generating combined US$ 14.9 billion in defence revenue, with exports accounting for a significant share.[16] Globally, the distribution underscored US dominance (47 firms), alongside a smaller but notable presence from the UK (6), Türkiye (5), China (5), France (5), India (2), and other defence-industrial states,[17] highlighting Türkiye's emerging position within the global defence market. It reflects Türkiye's gradual integration into the upper tiers of the global defence industrial hierarchy, albeit still behind the established Western producers.

Baykar's trajectory demonstrates the role of private sector innovation within Türkiye's defence industrial ecosystem, particularly in high-technology segments such as unmanned systems. Baykar, a private company founded in 1986, has evolved from an automotive engineering enterprise into a leading global developer of Unmanned Aerial Vehicles (UAVs), playing a significant role in advancing Türkiye's indigenous defence and aviation capabilities. Driven by a strong emphasis on self-financed research and development (R&D) and domestic innovation, the company has achieved a localisation rate of approximately 93 per cent, reflecting its commitment to technological independence. Baykar has delivered over 1,000 UAVs and expanded its export footprint to 39 countries, supported by a workforce exceeding 8,500 employees.[18] Its success—particularly with platforms such as TB2 and AKINCI—shows how private sector dynamism, coupled with indigenous engineering capacity has positioned it as a leading actor of next-generation military aviation systems. This underscores the role of private sector-led innovation within a state-supported ecosystem.

Crucially, Türkiye's defence industrial policy has been characterised by 'techno-nationalism', the linking of technological development to national identity and sovereignty.[19] Driven by sustained government initiatives and a confluence of factors, including geopolitical pressures, evolving security

threats, sanctions, and an export-oriented expansion, Türkiye has significantly enhanced its defence self-sufficiency. However, it continues to depend on imports of high-value-added technologies, which are largely sourced from its Western allies. Despite these constraints, the country's techno-nationalist orientation has gained increasing political salience, serving as a vehicle for projecting national pride and domestic political mobilisation. This is particularly evident in the celebration of defence-industrial achievements, especially in the UAV sector, which is mobilised in both electoral discourse and mass public events such as TEKNOFEST, where technological progress is closely associated with state leadership.[20]

At the national level, the Defence Industry Support Fund (SSDF) serves as the central financial mechanism underpinning Türkiye's defence and dual-use industrial expansion. Operating as an extra-budgetary instrument with revenues drawn from taxes, fees and earmarked contributions, the fund has ensured a relatively stable flow of resources, reportedly exceeding two billion US dollars annually in recent years, for long-term projects overseen by the SSB, including R&D, procurement and technology acquisition.[21] By insulating strategic programmes from annual budgetary constraints, the SSDF has enabled the state to sustain investment in high-cost, long-gestation projects that private capital markets would be unlikely to finance on their own, thereby supporting the development of domestic production and technological capabilities.

Export financing constitutes another key pillar of Türkiye's broader project finance architecture. Türk Eximbank plays a central role by offering export credits, guarantees and insurance schemes that support defence products and services, many of which incorporate dual-use technologies. By facilitating access to working capital and providing risk mitigation instruments, it enhances the global competitiveness of Turkish defence and technology firms. In addition, smaller enterprises are supported through grants and credit facilities approved by the Defence Industry Executive Committee to enable the broader participation of emerging firms in dual-use innovation ecosystems.[22]

International cooperation further complements these financing mechanisms, particularly for large-scale and capital-intensive projects. Türkiye has actively promoted state-to-state sales frameworks and associated credit arrangements that allow financially constrained partner countries to procure Turkish defence technologies. This approach simultaneously advances defence diplomacy and expands market access by integrating export promotion with intergovernmental financing. Moreover, joint ventures and

international consortia are increasingly utilised to distribute financial risk and mobilise resources for complex projects in sectors such as aerospace and infrastructure. Offset requirements reinforce this architecture by obligating foreign partners to engage in technology transfer, investment, or R&D activities within Türkiye, thereby facilitating the diffusion of dual-use capabilities into the broader civilian economy.[23]

Collectively, these developments transformed Türkiye's defence industrial base from a system oriented primarily towards licensed production and import substitution into one increasingly capable of indigenous design, systems integration and scalable production. This structural shift laid the foundation for the subsequent expansion of defence exports, as domestic platforms reached levels of technological maturity, cost competitiveness and operational reliability required for international markets.

Explaining Türkiye's Defence Export Growth: Structural, Policy, Operational and Geopolitical Drivers

Several interlocking factors account for Türkiye's emergence as a significant arms exporter. These can be categorised under structural, policy, operational and geopolitical drivers. These drivers operate in an interdependent manner, producing a cumulative effect on export competitiveness. Among these, operational validation and institutional coherence emerge as the most decisive drivers, while structural capacity and diplomatic positioning have reinforced and sustained export expansion. These correspond to supply-side capacity, institutional mediation, demand-side signalling and geopolitical access, respectively.

Structural Capacity and Industrial Scaling

A central structural driver of Türkiye's defence export growth has been the scaling of domestic production capacity, which enabled a transition from import dependence to export-oriented manufacturing. As indigenous production increasingly met the requirements of the Turkish Armed Forces, firms were able to achieve economies of scale and develop cost-competitive platforms for external markets. This shift is reflected in the rapid expansion of defence and aerospace export-led growth, with total exports reaching US$ 10.54 billion in 2025. The sector's share in national exports rose significantly from 1.7 per cent in 2022 to 3.6 per cent in 2025, reflecting its growing economic importance. Export efficiency also improved, with per capita export turnover increasing from US$ 45,000 in 2021 to US$ 100,000 in 2025, while

service exports reached US$ 184 million.[24] Additionally, the industry secured US$ 17.9 billion in new contracts in 2025, indicating a robust pipeline for future export growth and consolidating Türkiye's position as an increasingly export-driven defence-industrial actor. These trends demonstrate that industrial scaling has translated into both cost competitiveness and export capacity.

This expansion has been supported by sustained investment in R&D and the creation of a collaborative innovation ecosystem. Established in 1972 under the Scientific and Technological Research Council of Türkiye (TÜBİTAK), the Defence Industries Research and Development Institute (SAGE) focuses on conducting R&D in the defence sector. SAGE serves as a key research arm to fulfil the technological requirements of the Turkish Armed Forces and the national defence industry, with a focus on advancing indigenous defence capabilities.[25] Its core objective is to enhance Türkiye's technological self-reliance in defence, and it undertakes projects in collaboration with the Ministry of National Defence, Turkish Armed Forces, Presidency of Defence Industries, and other stakeholders in the defence sector. The integration of universities into the defence industrial ecosystem has created a pipeline of technically trained human capital necessary for sustained innovation. This institutional integration has been central to sustaining indigenous technological development.

An important policy shift in the early 2000s prioritised expansion of private sector R&D capacity with the creation of a collaborative innovation ecosystem rooted in strong university–industry linkages. This led to the establishment of Technology Development Zones (technoparks), along with dedicated R&D and Design Centres, supported by incentives such as tax exemptions, social security benefits, and wage subsidies for skilled scientific personnel. As a result, over 1,600 private R&D and Design Centres now employ highly qualified engineers, while 106 technoparks host more than 11,500 firms engaged in R&D and technology commercialisation.[26] This ecosystem has lowered barriers to entry for innovation and facilitated the commercialisation of defence technologies.

Supported by a clear national strategy and favourable regulatory framework, Türkiye has significantly scaled up its R&D workforce and investment. The number of full-time equivalent R&D personnel increased from around 29,000 in 2002 to nearly 291,000 in 2023, making Türkiye one of the fastest-growing countries in the Organisation for Economic Co-operation and Development (OECD).[27] Concurrently, annual R&D expenditure rose from approximately US$ 1.2 billion to over US$ 16 billion,

with nearly two-thirds driven by the private sector, underscoring the growing role of industry in innovation-led growth.[28] The increasing role of the private sector in R&D expenditure further underscores the shift towards an innovation-driven industrial model.

Policy Frameworks and Export Promotion Mechanisms

Türkiye's export promotion framework has been proactive, centralised, and closely integrated with its broader industrial policy. Under the 2011 Industrial Participation and Offset (IPO) Directive—later updated through the 2022 Industrialisation Guideline for Foreign Contractors issued by the Presidency of Defence Industries—Türkiye institutionalised offset requirements as a core component of defence procurement.[29] These policies mandate that foreign contractors reinvest a proportion of contract value into the domestic defence industry through mechanisms such as technology transfer, local production, export commitments and industrial cooperation. Rather than functioning as passive compensation, these offset provisions function as strategic instruments to facilitate technological absorption, strengthen indigenous capabilities, and accelerate the development of a self-reliant defence industrial base. In this way, procurement policy has been aligned with long-term industrial and export objectives.

Export growth has been underpinned by reforms introduced by the SSB to enhance the sector's long-term sustainability—a core objective of its 2019–2023 Strategic Plan.[30] In pursuit of this goal, the SSB has actively supported defence firms in expanding into regional markets by increasing defence attaché and consultancy presence, coordinating national participation in international defence exhibitions, institutionalising regular cooperation meetings with partner countries, and broadening its global outreach through new defence industry agreements and overseas offices. These measures collectively lowered market-entry barriers and enhanced the international visibility of Turkish defence firms.

In effect, these policies transformed procurement from a consumption-oriented activity into a strategic instrument for capability development and export expansion.

Operational Validation and Battlefield Credibility

Arguably, the most important driver of recent export growth has been the combat validation of Turkish platforms: the 2019–2020 conflict in Libya, where Turkish UAVs and air defence systems enabled the Government of National Accord to reverse battlefield setbacks; the 2020 Nagorno-Karabakh

War provided real-world proof of concept.[31] For prospective buyers, combat-tested systems carry a significant premium over comparable unproven platforms. This 'battlefield demonstration effect' significantly reduced information asymmetries for prospective buyers, enhanced credibility, and accelerated market entry, making it one of the most decisive drivers of Türkiye's recent export success. By reducing information asymmetries, such validation accelerates buyer confidence and procurement decisions.

Geopolitical Positioning and Market Access

Türkiye has strategically leveraged its geopolitical position to align defence exports with its broader foreign policy objectives. It has also utilised its NATO membership and deep ties with West Asia, South Asia, Central Asia and Africa. This positioning allows Ankara to offer military equipment to customers who might face political obstacles in acquiring Western systems, either due to human rights conditionalities, political sensitivities, or outright sanctions.

In an exemplary balancing act, Türkiye supplied TB2s to Ukraine in 2021–2022, while simultaneously maintaining significant economic and diplomatic ties with Russia. It demonstrated the commercial advantages of strategic ambiguity on the part of Ankara.[32] This explains a model in which defence exports function not only as commercial transactions but also as instruments of strategic influence and diplomatic engagement. This positioning has enabled Türkiye to access markets that have traditionally remained out of bounds for the Western suppliers.

Taken together, these drivers exemplify that Türkiye's export success is an outcome of a mutually reinforcing ecosystem. Institutional coordination provided the organisational backbone, industrial scaling ensured production capacity, operational validation enhanced credibility, and diplomatic engagement facilitated market access. The interaction of these elements enabled Türkiye to transition from a domestically oriented defence producer to a competitive exporter within a relatively compressed timeframe. This integrated model explains both the rapid expansion and the relative resilience of Türkiye's defence export performance.

Türkiye's Defence Export Portfolio: Sectoral Composition and Market Reach

Türkiye's export portfolio has expanded considerably in both breadth and depth over the past decade. While UAVs have attracted the most international

attention, the portfolio encompasses a diverse range of capabilities across maritime, land, aviation and electronics domains. This diversification reflects a deliberate strategy to reduce dependence on single-platform exports and enhance resilience across multiple defence segments.

Unmanned Aerial Systems (UAS)

UAS have emerged as the most prominent segment in Turkish defence exports. This success reflects a combination of cost-effectiveness, operational reliability and adaptability to diverse combat environments. Platforms such as the Bayraktar TB2 and ANKA have gained international visibility following their deployment in recent conflict theatres, positioning Türkiye as a significant supplier in the global UAV market.

For instance, Baykar has consolidated its position as one of the world's leading exporters of UAVs, maintaining this status through 2025, with US$ 2.2 billion in export revenue and approximately US$ 2.5 billion in total earnings, of which exports accounted for 88 per cent.[33] The firm, known for its indigenous unmanned combat aerial vehicle (UCAV) platforms, has consistently driven Türkiye's high-technology exports, financing its programmes internally since 2003 and deriving over 80 per cent of cumulative revenue from foreign sales. Its export performance remained strong at US$ 1.8 billion in both 2023 and 2024, accounting for up to 90 per cent of revenue, and placed it among Türkiye's top exporters. As of January 2026, Baykar expanded its global footprint, securing UAV export agreements with 37 countries, including contracts for the Bayraktar TB2 UCAV (36 countries) and the AKINCI UCAV (16 countries).[34] This performance demonstrates how a single high-demand platform segment can drive export expansion and global market visibility.

Türkiye's KAAN fifth-generation fighter programme marks a significant step beyond UAV-led exports into the higher end of the aerospace market. In June 2025, Türkiye and Indonesia signed agreements for the export of 48 KAAN aircraft, with SSB and TAI indicating that delivery will be phased over 120 months and that the arrangement includes production, engineering and technology-sharing components.[35] The deal is analytically important because it suggests that Türkiye's defence export profile is no longer limited to comparatively affordable and battlefield-proven platforms, but is beginning to extend into advanced combat aviation and deeper industrial cooperation.

At the same time, the KAAN case should be read as an emerging capability rather than a fully consolidated export success, since serial production is still in progress and the aircraft has only recently entered the export market. A key

vulnerability remains propulsion: the initial KAAN aircraft and prototypes are powered by US-supplied General Electric F110 engines, while Türkiye is developing the indigenous TF35000 turbofan, whose integration into KAAN is targeted for around 2032.[36] Access to additional F110 engines for serial production had previously encountered political opposition in the US due to concerns about Türkiye's continued possession of the Russian S-400 system. The US export-licensing process was cleared after immense efforts in July 2026, which allowed Türkiye to proceed with the planned acquisition of dozens of additional F110 engines.[37] The incident demonstrated that dependence on foreign propulsion systems can expose KAAN to external export-control decisions.

This experience also has implications for KAAN's export prospects. Any third-country buyer would depend on continued US approval for the transfer of the F110 engine, or an equivalent foreign-supplied engine. This dependence creates political risk for Türkiye and could weaken KAAN's appeal to countries seeking to avoid the export restrictions and conditions often associated with the Western defence suppliers.

Naval Platforms

Defense Technologies Engineering and Trade Inc. (STM) has reached a key milestone in its naval export programme for the Portuguese Navy with the keel-laying of an Auxiliary Oiler Replenisher and Logistics Ship in Istanbul. As the prime contractor, STM's project marks Türkiye's first military ship export to an EU and NATO member. The contract, signed in December 2024 after STM won a competitive international tender, progressed from design completion to construction, culminating in the keel-laying ceremony at ADA Shipyard in January 2025.[38] Moreover, the steel-cutting ceremony for the second Logistics Support Ship, N.R.P. D. Dinis (A5212), was held in Istanbul on 18 June 2026, marking the commencement of its construction.[39] This entry into European markets signals a qualitative shift in Türkiye's export profile towards higher-end and more competitive segments.

On 5 July 2018, Pakistan's Ministry of Defence Production concluded a US$ 1.5 billion agreement with Türkiye's Military Factory and Shipyard Corporation (ASFAT A.Ş.) for the acquisition of four customised MILGEM Ada-class corvettes for the Pakistan Navy.[40] Beyond platform procurement, the deal includes comprehensive technology transfer and intellectual property rights related to ship design. Unlike earlier programmes, this arrangement enables deeper collaboration with Pakistani entities such as Karachi Shipyard & Engineering Works and the Navy's R&D institutions to develop Pakistan's

first indigenously designed frigate and to reduce reliance on externally supplied kits of materials. These naval exports signal Türkiye's ambitions beyond UAVs into the blue-water naval capabilities and demonstrate an increasing emphasis on technology transfer and co-production models. In this context, the Pakistan case is particularly significant, as it reflects a shift from platform exports to long-term capability development and industrial collaboration, distinguishing it from more transactional export relationships.

Armoured Vehicles and Land Systems

Türkiye has consolidated its role as a major global supplier of armoured vehicles, exporting over 1,000 units between 2022 and 2023, including 501 vehicles to 11 countries in 2023 alone, according to its submission to the United Nations Register of Conventional Arms.[41] This indicates sustained demand for cost-effective land systems in diverse operational environments. Key recipients included the UAE, Kazakhstan, Saudi Arabia, and several African and Asian states, reflecting a broad and diversified export footprint across regions. Although total exports declined slightly from 549 units in 2022, the overall trend since 2019 indicates sustained growth, underscoring Türkiye's expanding presence in global defence markets. While specific platforms are not disclosed in official reporting, open-source evidence suggests widespread deployment of systems produced by firms such as Otokar and Nurol Makina, with vehicles like COBRA II and Ejder variants increasingly integrated into partner countries' security and military operations. Such platforms have gained traction due to their adaptability, affordability, and suitability for internal security as well as conventional roles.

Electronics, Missiles and Air Defence

ASELSAN has continued to expand its international defence business, rising to 40th place in the 2026 *Defense News* Top 100, up from 43rd in the previous ranking and becoming the first Turkish defence company to enter the global top 40. In 2025, the company secured more than US$ 2 billion in export contracts, while new contract awards increased by 72 per cent to US$ 4.9 billion in the first half of 2026, taking its backlog to a record US$ 23.2 billion.[42] Its global footprint also expanded to 97 countries. Complementing this outreach, ASELSAN intensified its participation in global defence exhibitions, attending 47 events in 2025 and engaging extensively with international delegations.[43]

ASELSAN's export portfolio increasingly encompasses high-technology capabilities across air defence, electronic warfare, radar, electro-optics,

communications, avionics, guided munitions, naval systems and unmanned platforms. This expansion reflects Türkiye's growing competitiveness in technologically sophisticated defence products and ASELSAN's transition from a predominantly domestic supplier to a globally oriented defence technology company.

Taken together, the composition of Türkiye's export portfolio reveals a distinct pattern, with dominance in cost-effective, operationally proven platforms such as UAVs and armoured vehicles, alongside a gradual expansion into higher-value-added segments, including naval systems and advanced electronics. This diversification has not only broadened Türkiye's market reach but also reduced dependence on any single category, thereby enhancing the resilience and sustainability of its export growth.

Geopolitical Dimensions of Türkiye's Arms Exports

Türkiye's arms export strategy is inextricably linked to its broader foreign policy objectives. Drawing on Ahmet Davutoğlu's concept of 'strategic depth', Türkiye has pursued a multi-dimensional foreign policy anchored in its historical and geostrategic linkages to surrounding regions, including West Asia, the Balkans, the Caucasus and Central Asia—an approach later expanded under the Erdoğan government to include additional theatres such as Africa. Defence exports serve as both a commercial activity and a diplomatic instrument, enabling Türkiye to build partnerships, demonstrate relevance, and underwrite its claims to regional leadership. In this framework, defence exports function as instruments of influence, enabling Türkiye to translate geopolitical positioning into sustained market access.

Africa: Expanding Footprint

As per the SIPRI data, Türkiye was the third-largest supplier of major arms to sub-Saharan Africa, accounting for 11 per cent of the region's total arms imports from 2021 to 2025.[44] This placed it just behind Russia (12 per cent), China (22 per cent), and ahead of most other suppliers to the sub-region. This highlights Türkiye's rapid penetration into a market traditionally dominated by established suppliers.

Ankara has actively sought to expand into external markets, with Africa emerging as a key destination, supported by prior investments through multi-track diplomatic engagement, including high-level visits, defence agreements and security cooperation initiatives. While this expanded outreach has

facilitated arms sales, it alone does not fully account for the marked rise in exports observed since 2021. Rather, this trend is better explained by a combination of sustained diplomatic engagement, a relatively flexible, 'no-strings-attached' export policy, and the demonstration effect of Turkish defence systems in operational contexts.[45]

Baykar has established a strong presence in Africa through its Bayraktar TB2 UCAV, which is widely valued for its intelligence, surveillance and precision strike capabilities. The continent has emerged as one of Baykar's fastest-growing markets, with its systems employed by several states to address internal security threats and enhance deterrence. Across Africa, countries including Mali, Morocco, Ethiopia, Nigeria, Libya, Burkina Faso, Togo, Niger, Djibouti, Somalia, Rwanda and Kenya have procured Baykar's indigenously developed UAV platforms, underscoring their expanding operational footprint.[46] For African nations, Türkiye offers a non-Western supplier that does not impose governance conditionalities—a significant attraction in a geopolitical climate where recipients of Western aid and equipment increasingly chafe against political restrictions. This diffusion underscores the scalability and operational appeal of Turkish UAV systems in low- and medium-intensity conflict environments.

Central Asia and Azerbaijan: Strategic Alignment

Türkiye's pan-Turkic solidarity, rooted in shared linguistic and cultural ties with Azerbaijan and the Central Asian republics, provides a natural diplomatic foundation for defence cooperation. The relationship with Azerbaijan is the most mature, with defence exports, intelligence-sharing arrangements and joint military exercises. Türkiye's defence engagement with Azerbaijan since the 2020 war has centered on high-technology and operationally critical systems. Various reports indicate that Azerbaijani acquisitions from Türkiye include UAVs such as the Bayraktar TB2 and AKINCI, precision-guided munitions (notably the KGK-83), and armoured vehicles such as the Cobra II.[47] Beyond hardware transfers, cooperation has extended to training of UAV operators, development of operational infrastructure, and defence-industrial collaboration, including agreements with Baykar for potential local production of unmanned systems. Collectively, these activities highlight Türkiye's role in strengthening Azerbaijan's capabilities in intelligence, surveillance and reconnaissance (ISR), precision strike and modern network-enabled warfare. This deep integration reflects a model of defence cooperation that extends beyond exports to encompass capability-building partnerships.

Türkiye's defence exports to Central Asia are primarily centered on UAVs and related industrial cooperation, with adoption varying across countries. Turkmenistan was among the earliest adopters, acquiring Bayraktar UAVs, while Kyrgyzstan has emerged as a major recipient, procuring advanced Turkish drones such as AKINCI and Aksungur as part of broader military modernisation efforts. Uzbekistan has also inducted Bayraktar TB2 UAVs into its arsenal, indicating growing acceptance of Turkish platforms in the region. In Kazakhstan, cooperation has taken a more industrial form, with an agreement signed with Turkish Aerospace Industries for the assembly and maintenance of ANKA UAVs, reflecting a shift towards technology transfer and local production.[48] Such arrangements indicate a gradual shift from transactional exports towards industrial collaboration and co-production models.

South Asia and the Indian Ocean: Emerging Presence

The integration of defence exports with longer-term strategic and industrial cooperation is most clearly evident in Türkiye's engagement with Pakistan, as shown in the naval domain in the previous section. Moreover, Türkiye's defence-export outreach has begun to extend into South Asia and the Indian Ocean, with Bangladesh and the Maldives indicating an emerging, though still limited, regional footprint.

Bangladesh's reported procurement of at least six Bayraktar TB2 systems in 2022,[49] six Turkish-built T129 ATAK attack helicopters under a US$ 600 million government-to-government agreement in January 2026,[50] and subsequent high-level defence engagement suggest a gradual shift from transactional acquisition towards broader security cooperation. In the Maldives, the transfer of Bayraktar TB2 platforms for maritime surveillance in 2024,[51] followed by the commissioning of a Turkish-origin 58-meter Doğan-class vessel (CGS Dharumavantha) in 2025,[52] reflects a complementary pattern of capability provision and defence diplomacy. While these engagements remain modest in scale, they are analytically significant in signalling Türkiye's entry into strategically sensitive sub-regions proximate to India. This expansion underscores the growing geographic diffusion of Turkish defence exports and their potential to shape security dynamics in the Bay of Bengal and the wider Indian Ocean.

The Russia–Ukraine War: Strategic Balancing and Export Pragmatism

Baykar, the producer of Bayraktar drones, signed an agreement with Ukraine during the SAHA Expo defence exhibition in Istanbul in October 2024.[53]

Ukrainian forces had widely employed the company's UAV systems in the early stages of the 2022 Russian invasion. While Bayraktar drones were initially lauded for their effectiveness in targeting and destroying Russian armour during the early phase of the 2022 invasion, the subsequent strengthening of Russian air defence and electronic warfare capabilities reduced their offensive role, with Ukrainian forces now primarily employing them for reconnaissance activities.[54] This evolution shows the dynamic interaction between battlefield conditions and the export utility of specific platforms.

Türkiye's arms sales to Ukraine, including TB2 drones, occurred while Ankara maintained significant economic and energy ties with Russia. Türkiye refused to join the Western sanctions on Moscow following the 2022 invasion and positioned itself as a mediator. This balancing act— selling arms to one belligerent whilst maintaining diplomatic and commercial relations with the other—exemplifies Türkiye's transactional and pragmatic approach to arms export diplomacy. Such strategic balancing enhances Türkiye's diplomatic leverage while preserving its access to multiple markets.

This broader external engagement also has implications for Türkiye's position within the European defence ecosystem. Türkiye's rapidly expanding defence industry, marked by adaptability, technological innovation and cost competitiveness, contrasts with several European defence sectors that are often more risk-averse.[55] Coupled with its demonstrated operational capabilities and expanding global footprint, this positions Türkiye as an increasingly relevant, albeit politically complex, defence partner for Europe. This creates both opportunities for selective cooperation and friction arising from political divergences.

Taken together, Türkiye's arms export geography reflects a differentiated strategy: expansion into emerging markets such as Africa through cost-effective, low-conditionality offerings; consolidation of influence in culturally proximate regions through deeper defence partnerships; and strategic balancing in contested theatres to maximise diplomatic and commercial flexibility. This multi-dimensional approach has enabled Türkiye to align defence exports with broader geopolitical objectives while sustaining market diversification.

Constraints and Contestations in Türkiye's Export Expansion

Despite this expansion, Türkiye's defence export trajectory has not been without constraints and contestation. Türkiye's defence export expansion has also been shaped by external constraints linked directly to the operational

use of its systems in conflict environments. A notable case is Canada's suspension and subsequent cancellation of export permits for certain military technologies to Türkiye after determining that Canadian-origin components had been used in Turkish UAVs deployed during the 2020 Nagorno-Karabakh conflict. The Canadian government confirmed the cancellation of these permits in April 2021, citing concerns over diversion and misuse of exported technology. These restrictions disrupted drone production supply chains and highlighted the vulnerability of export-oriented platforms to third-country export controls.[56]

At the same time, Türkiye's growing presence in Africa has been facilitated by demand in politically fragile and conflict-affected states, where rapid delivery and relatively fewer political conditionalities enhance the attractiveness of Turkish systems. However, this expansion is not without contestation. Reports argue that Turkish arms transfers to African states have increasingly intersected with ongoing conflicts, where weak regulatory oversight and fluid political conditions raise the risk of diversion, proliferation across rival factions, and escalation of violence.[57] It indicates that Türkiye's export model operates within a structurally contested environment, as instability creates market opportunities, but also exposes exports to regulatory pushback, reputational risks, and the unintended consequences of conflict diffusion.

Türkiye's expanding defence-industrial capabilities have also generated growing concern in Israel, particularly as Ankara's military power and regional role have expanded. This concern became especially explicit in 2026 over the prospect of Türkiye returning to the US F-35 programme. Following signals from Washington in July 2026 that it was considering renewed F-35 sales to Ankara, Israel's Prime Minister Benjamin Netanyahu publicly opposed the move, arguing that the transfer could disrupt the regional balance of power.[58] Other senior Israeli officials likewise voiced opposition, while Deputy Foreign Minister Sharren Haskel stated in January 2026 that Israeli-origin technology incorporated into the F-35 would not be shared with Türkiye even if Washington approved a sale.[59] Israeli concerns, therefore, extend beyond the aircraft itself to the protection of Israel's qualitative military edge and the implications of Türkiye's expanding military capabilities in Syria.[60] It elucidates that Türkiye's growing defence-industrial capabilities can generate strategic resistance not simply because of individual export contracts, but because they alter perceptions of the regional balance of power and raise questions over the transfer of advanced military technologies.

Implications for India's Defence Industrial and Export Strategy

India remains the world's second-largest arms importer, accounting for approximately 8.2 per cent of global arms imports between 2021 and 2025.[61] The implications for India extend beyond the bilateral dimension of Türkiye–Pakistan defence cooperation. Türkiye's expanding footprint in South Asia and the Indian Ocean Region—through armed drone exports to Bangladesh and maritime surveillance platforms in the Maldives—signals a broader pattern of strategic penetration into India's neighbourhood and extended maritime neighbourhood. Türkiye's rise as a defence exporter has direct implications for India across four interrelated dimensions: third-market competition, strategic spillovers through Pakistan, institutional design, and technological self-reliance. *First*, competition is likely to intensify in regions such as Africa, West Asia, and parts of Southeast Asia, where procurement decisions are shaped not only by technological capability but also by cost, delivery timelines, financing and political conditionalities. Türkiye's ability to bundle platforms with flexible financing, offsets and state-backed agreements gives it a systemic advantage. For India, this implies that export competitiveness must move beyond platform quality to integrated export packages that combine certification, financing, maintenance and industrial participation.

Second, the Türkiye–Pakistan defence relationship adds a strategic dimension to what would otherwise be a commercial challenge. Programmes such as MILGEM (Milli Gemi-National Ship) exemplify that Turkish exports increasingly involve co-production and long-term capability development rather than one-off sales. This creates enduring military-industrial linkages that may enhance Pakistan's operational capacity. While the Türkiye–Pakistan partnership remains the most advanced and institutionalised, including the naval domain, it now forms part of a wider regional pattern rather than a standalone case. For instance, on 7 August 2026, Saudi Arabia, Türkiye and Pakistan signed the Mecca Joint Defence Agreement, committing to treat an armed attack on any one signatory as an attack on all three. The pact is expected to provide an institutional platform to expand Turkish defence exports and deepen trilateral military–industrial cooperation across West Asia and South Asia.[62]

India's own experience and subsequent decisions substantiate this spillover. For instance, in April 2024, Hindustan Shipyard Limited formally terminated its 2020 technical-collaboration arrangement with the Turkish

TAIS consortium for building five 45,000-tonne Fleet Support Ships, citing concerns rooted in Ankara's close military alignment with Pakistan and its recurrent anti-India statements on Kashmir at international forums, and opted to complete the project indigenously.[63]

During a special press briefing on 9 May 2025, Indian government officials stated that Pakistan had conducted repeated incursions into Indian airspace between 8 and 9 May 2025 along the western border, reportedly deploying approximately 300–400 Turkish-manufactured Songar drones for reconnaissance and attempted strikes on military installations across 36 locations, from Leh to Sir Creek.[64] Assessments by the Indian military authorities indicated that the unmanned systems were likely Asisguard Songar platforms sourced from Türkiye, with further evidence suggesting the use of Turkish-origin UAVs referred to as 'Yiha'.[65] Consequently, India must treat Turkish exports not only as market competition but also as part of a broader regional security dynamic, requiring parallel responses in capability development, particularly in areas such as counter-drone systems and air defence.

Beyond its immediate military and diplomatic fallout, Operation Sindoor would most likely have prompted a reassessment within Türkiye's own defence-industrial establishment. Considering that Indian systems neutralised Turkish-origin UAVs, namely Yiha, showing the superiority of India's indigenous air defence and electronic warfare networks. It would have alarmed the Turkish–Pakistani military nexus. Beyond South Asia, Cyprus, itself wary of Ankara, has cited the battle-tested performance of Indian systems in Operation Sindoor as a reason to explore buying Indian defence platforms and co-work with Indian defence industries.[66]

Third, the Turkish experience highlights the importance of institutional coordination rather than institutional proliferation. Türkiye's defence-industrial system is marked by a high degree of centralised policy integration, particularly in aligning procurement decisions, industrial incentives, and export promotion under a relatively cohesive framework. In contrast, India possesses a comprehensive but functionally dispersed institutional architecture, with responsibilities distributed across multiple departments and policy instruments. The resulting coordination gaps can dilute the effectiveness of otherwise robust policy frameworks such as the Defence Acquisition Procedure (DAP) 2020, Positive Indigenisation Lists, SRIJAN portal, and test facility support for industries in DRDO labs,[67] among others. Given that the Defence Production and Export Promotion Policy (DPEPP)

2020 is yet to be finalised, there is a strong case for its formal approval and institutionalisation. Elevating DPEPP from a draft framework to an approved policy would enhance its authority as a coordinating instrument and improve alignment between procurement, industrial production and export promotion mechanisms. Accordingly, the policy challenge for India is not the creation of new institutions, but the strengthening of inter-agency coherence and strategic alignment across existing mechanisms.

Fourth, Türkiye's own KAAN programme offers a cautionary parallel on propulsion dependency that applies directly to India's fighter aircraft programmes. The US-origin General Electric F404-IN20 engine powers the Tejas Mk1A, while the higher-thrust F414-GE-INS6 has been selected for the Tejas Mk2 and for prototype development, testing and certification of the Advanced Medium Combat Aircraft (AMCA).[68] Delays in F404-IN20 deliveries have contributed to delays in the formal handover of Tejas Mk1A aircraft to the Indian Air Force: although deliveries under the 83-aircraft contract were originally scheduled to begin in March 2024, no Mk1A had been formally handed over by 3 September 2026, while only 10 of the 99 F404-IN20 engines ordered for the original Mk1A programme had been supplied.[69] The experience reinforces the strategic importance of developing indigenous propulsion capability alongside airframe design, since dependence on foreign engines can create a critical production bottleneck even when the aircraft itself is domestically designed and manufactured.

Four specific lessons follow from this comparison. The first is the need for institutional integration, which reduces coordination costs by linking export promotion more directly to procurement and industrial policy. The second is operational validation, prioritising a limited set of platforms that achieve credibility through sustained domestic deployment, as export success is strongly tied to demonstrated performance. The third is financing and market access: developing more structured export credit, offset, and industrial participation mechanisms that translate domestic production into external demand. The fourth is technological self-reliance, developing indigenous propulsion and other critical sub-systems to avoid production bottlenecks arising from dependence on foreign suppliers.

Taken together, the key lesson is that defence exports cannot be treated as a downstream outcome of production. They require a coordinated system in which design, procurement, validation, financing and diplomacy operate as a single chain. Without such integration, incremental policy improvements are unlikely to yield sustained export competitiveness.

Conclusion

Türkiye's emergence as a significant defence exporter reflects a broader shift in the global arms trade, where middle powers are increasingly leveraging industrial policy, operational experience and geopolitical positioning to expand their market presence. This study has shown that Türkiye's export success is not attributable to a single factor, but rather to the interaction of institutional coordination, industrial scaling, operational validation, and a strategically calibrated export policy. Together, these elements have enabled a relatively rapid transition from import dependence to export capability within a compressed timeframe.

The analysis also demonstrates that defence exports function not merely as commercial transactions but as instruments of statecraft, embedded within wider foreign policy objectives. Türkiye's differentiated regional approach, combining market expansion in South Asia, Africa, deepened defence partnerships in culturally proximate regions, and strategic balancing in contested theatres has allowed it to diversify markets while maintaining diplomatic flexibility. The evidence suggests that Türkiye's defence exports are increasingly embedded within region-specific strategic frameworks, including in South Asia and the Indian Ocean Region.

For India, the Turkish experience offers a set of conditional lessons rather than a replicable model. The central challenge lies not in the absence of policy initiatives but in the need to align procurement, industrial development, financing and export promotion into a coherent system. The absence of a formally approved DPEPP underscores the gap between policy articulation and institutional consolidation in India's defence-industrial framework. Export competitiveness in the defence sector is cumulative and path-dependent, built through sustained domestic adoption, credible operational performance, and integrated institutional support.

Ultimately, the comparison underscores that defence industrialisation translates into export success only when capability development and external market engagement are pursued as mutually reinforcing processes.

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