

RESEARCH DOSSIER

Türkiye Vehicle Market: Brands and Fuel Transition in August 2026

New registrations slowed while the existing fleet retained a different fuel mix. Five charts separate monthly activity, brand shares and the eight-month transition.

50.2% | hybrid plus electric share of newly registered cars

What the data shows

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01 Two markets behind new registrations

Motorcycles represented 47.5% and cars 38.4% of the 171,887 August registrations. Together they accounted for 85.9%. Vans represented 9.6%; other vehicle types made up the remainder. Treating the total as a car-market figure would therefore substantially change its meaning.

Registrations fell 17.2% from the previous month and 20.1% from the same month a year earlier. These comparisons use different bases and cannot be added. They are not a seasonally adjusted demand index. Registration timing and calendar effects require separate investigation before attributing the movement to a single cause.

Figure 1 / New registrations by type



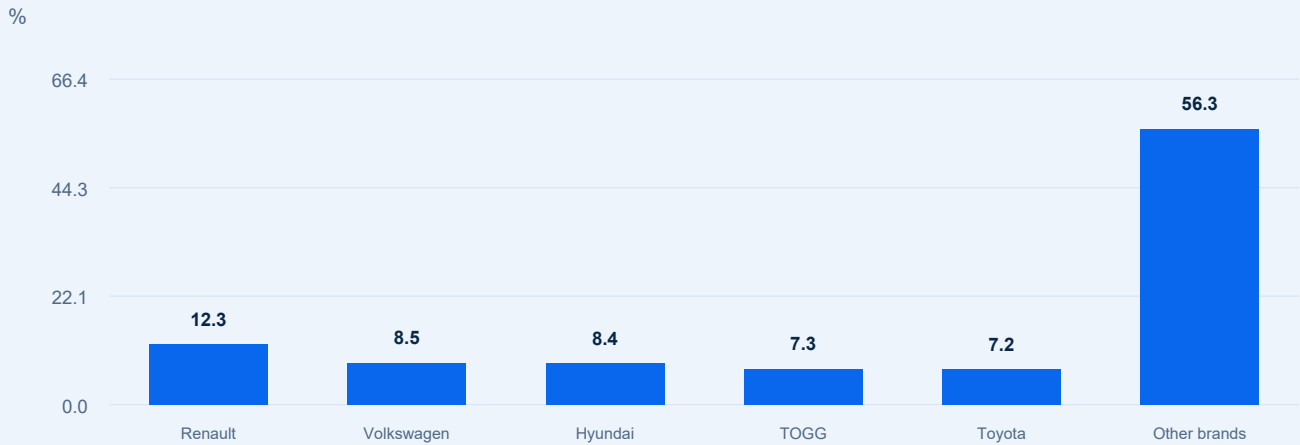
August 2026 registration shares; not sales or fleet shares.

02 Reading brand concentration

The 66,048 newly registered cars included Renault at 12.3%, Volkswagen at 8.5%, Hyundai at 8.4%, TOGG at 7.3% and Toyota at 7.2%. Their combined share was 43.7%; the residual for all remaining brands was approximately 56.3%. The chart groups those remaining brands for readability.

The gap between Volkswagen and Hyundai was only 0.1 percentage point, compared with 3.8 points between Renault and Volkswagen. Rounded shares cannot provide exact vehicle counts. A brand ranking is not a model ranking: each brand can contain several models and powertrains. No model-level figures are invented where this release does not provide them.

Figure 2 / Car registration shares by brand



TÜİK / MasVeri

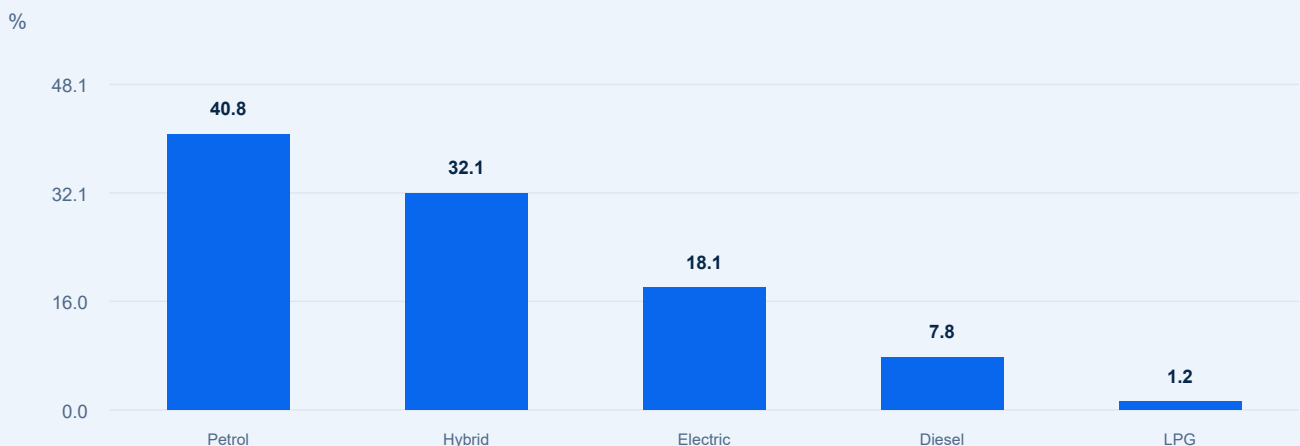
August 2026. Top five and all remaining brands; not the original outside-top-20 category.

03 Fuel mix in the eight-month flow

Among 600,859 cars registered from January through August, petrol accounted for 40.8%, hybrid for 32.1%, electric for 18.1%, diesel for 7.8% and LPG for 1.2%. Hybrid and electric together reached 50.2%, slightly above the other three categories combined at 49.8%.

This does not mean that battery-electric cars formed a majority: the electric category alone was 18.1%. Nor is the hybrid category assumed to mean plug-in hybrid. These are eight-month shares, not August-only shares. Energy demand or charging requirements cannot be calculated from registration composition alone.

Figure 3 / Fuel mix of newly registered cars



TÜİK

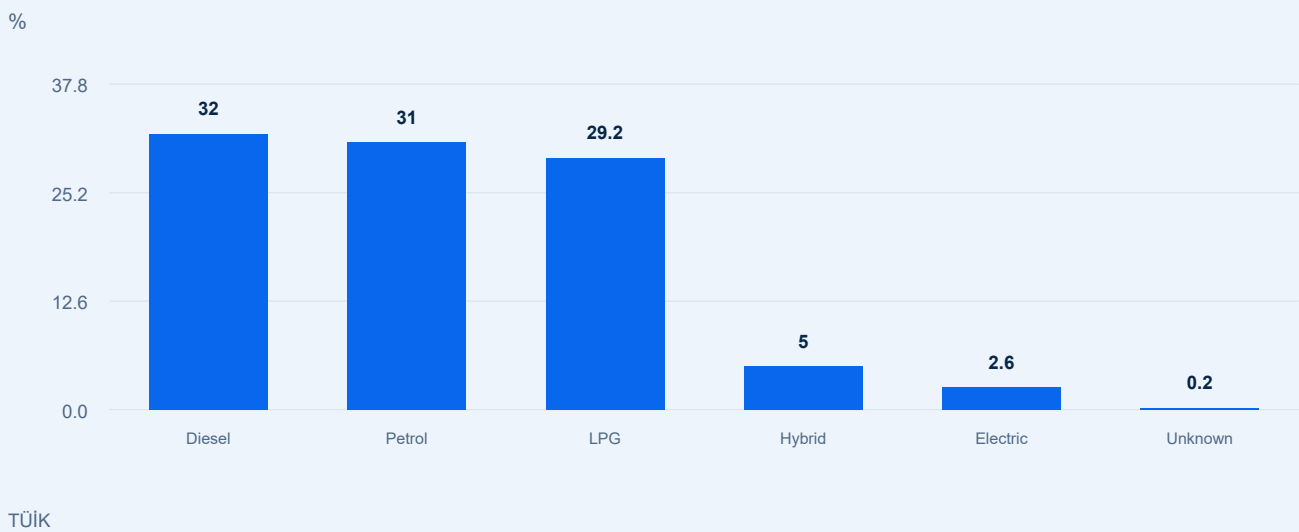
January–August 2026, 600,859 cars. Hybrid and electric are separate categories.

04 Why the existing fleet looks different

The end-August stock of 18,037,907 cars was 32.0% diesel, 31.0% petrol, 29.2% LPG, 5.0% hybrid and 2.6% electric, with 0.2% unknown. Hybrid and electric therefore represented 7.6% of the stock versus 50.2% of new registrations.

The 42.6-point difference compares a flow with an accumulated stock; it is not an annual growth rate. Cars remain in use for years, so new registration choices do not instantly transform the whole fleet. Regional distribution, mileage and retirement patterns are necessary to translate this observation into service or infrastructure requirements.

Figure 4 / Fuel mix of the existing car fleet



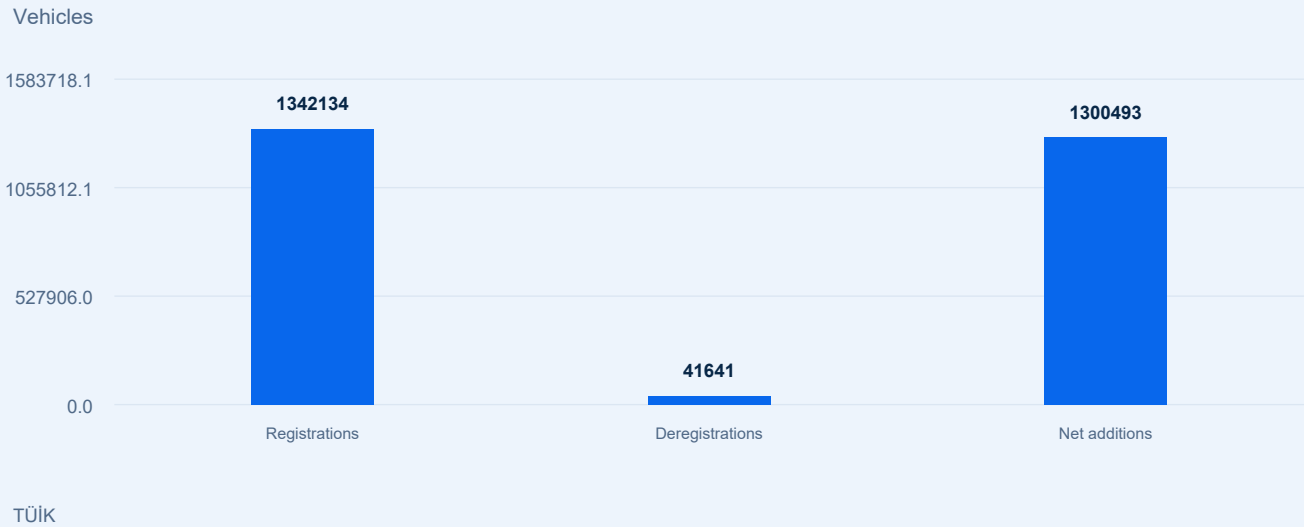
Stock of 18,037,907 cars at end-August.

05 Slower inflows can still expand the fleet

January–August registrations totalled 1,342,134 and deregistrations 41,641, producing 1,300,493 net additions. A 14.1% year-on-year fall in registrations can coexist with fleet growth whenever inflows still exceed outflows. These statements describe different quantities.

Deregistrations were roughly 3.1% of registrations. This is not a fleet-wide scrappage rate: the denominator is different and reasons for removal are not separated. The end-August total of 34,911,879 vehicles includes all types and must not be confused with the smaller car-only stock used in the fuel chart.

Figure 5 / Registrations and net fleet additions



January–August. Net additions = registrations minus deregistrations; transfers are not added.

06 Transfers measure another kind of activity

August recorded 917,143 ownership transfers. A transfer can change an owner without adding a vehicle to the fleet, so transfers and new registrations should not be summed as new demand. Cars accounted for 66.4% of transfers, vans 13.7% and motorcycles 12.5%.

Motorcycles led new registrations while cars dominated transfers. That contrast identifies different market channels, not a direct explanation of purchasing motives. The figures do not establish transaction prices, borrowing or the number of distinct buyers. Service planning may need the existing fleet, while first-registration products need the inflow composition.

07 Questions for sector planning

The data suggest examining both changing powertrains among new cars and continuing maintenance demand in the existing fleet. This is a research framework, not an investment recommendation or revenue forecast. National shares cannot establish the customer mix of an individual city or district.

Monthly brand rankings can be affected by delivery and registration timing. Persistent concentration requires a consistent sequence of observations. This report deliberately keeps monthly brand shares and eight-month fuel shares separate. Neither distribution alone explains why a consumer selected a particular model.

08 Method and source

All observations come from TÜİK's August 2026 motor-vehicle release, number 58052. MasVeri calculated combined shares and net differences and wrote the interpretation. Published percentages are rounded; the 56.3% residual for brands outside the leading five is calculated from those rounded values.

Monthly registrations, eight-month totals and end-month stock remain distinct. No missing historical values or model-level sales are estimated. The report is a dated snapshot of the cited release. Subsequent statistics will not silently replace this publication; any revision requires a separate review.

Source and coverage

August 2026 registrations; January–August fuel mix and net additions; end-August stock. TÜİK release 58052, 16 September 2026. Not full-year results or model-level sales.

New registrations by type

[TÜİK / 1 / veriportali.tuik.gov.tr](#)

[CSV / MasVeri](#)

Car registration shares by brand

MasVeri: Other brands = $100 - (12.3 + 8.5 + 8.4 + 7.3 + 7.2) = 56.3\%$.

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Fuel mix of newly registered cars

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Fuel mix of the existing car fleet

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Registrations and net fleet additions

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Executive summary

50.2% | hybrid plus electric share of newly registered cars

01 171,887 vehicles were newly registered in August, down 20.1% year on year; 66,048 were cars.

02 Hybrid plus electric: 50.2% of new cars versus 7.6% of the existing car fleet. The difference is 42.6 percentage points.

03 The five leading brands represented 43.7% of car registrations. Registrations, transfers and stock are distinct measures.