



# 2020 SHAPE THE WORLD WITH TURKISH STEEL



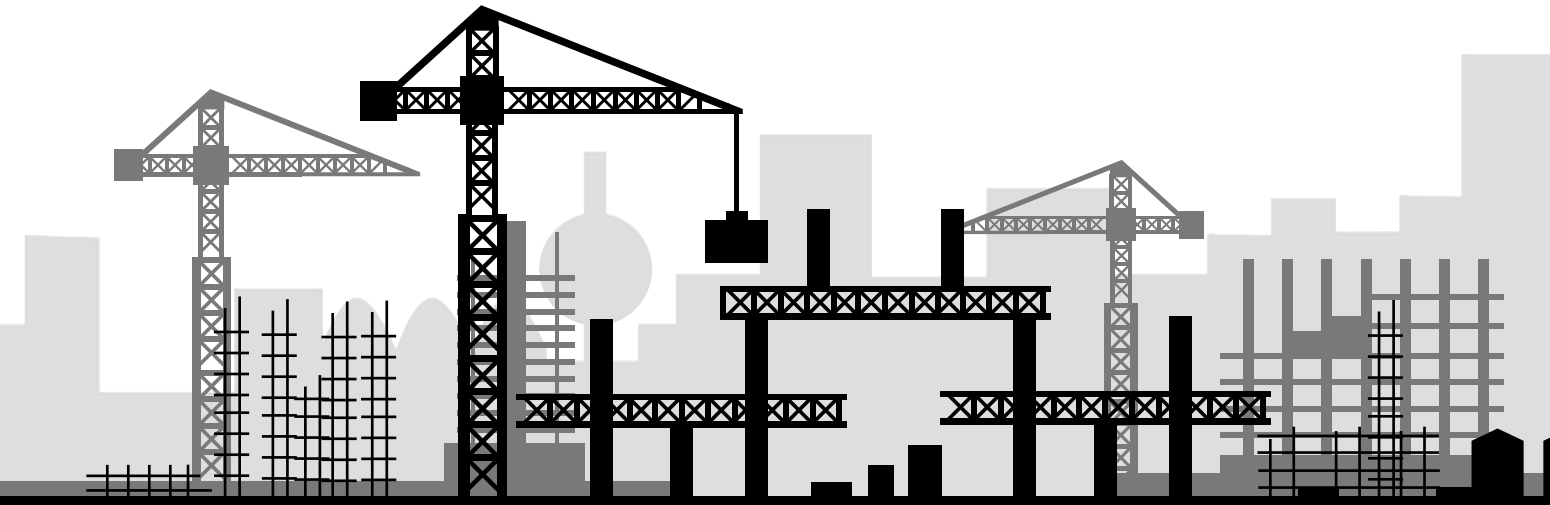
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REPUBLIC OF TURKEY  
MINISTRY OF TRADE

Turkey

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▶ **Europe's 2<sup>nd</sup> largest steel producer**

▶ **World's largest rebar exporter**

▶ **World's 8<sup>th</sup> largest steel producer**

▶ **The world's 6<sup>th</sup> biggest steel exporter**



**Exports to 197 countries**



**World's largest importer of scrap metal**



**68% of steel production from steel scrap**



**33.7 million tons crude steel production in 2019**

# TURKEY AT A GLANCE



- ▣ LOCATED ON A CENTRAL NODE BETWEEN WIDELY USED TRADE LINES
- ▣ MAIN DRIVING FACTOR OF THE TURKISH ECONOMY IS SET TO BE THE FOREIGN TRADE
- ▣ CONTINUOUSLY INCREASING EXPORT VOLUME AND HIGH QUALITY PRODUCTS
- ▣ STRONG INDUSTRY
- ▣ SKILLED AND EXPERIENCED WORK FORCE
- ▣ DYNAMIC POPULATION

**Official Name:** Republic of Turkey

**Capital City:** Ankara

**Currency:** Turkish Lira (TRY)

**Language:** Turkish

**Population:** 83,154,997 +%1.4 (2019-TURKSTAT)

**Civilian Labour Force:** 32,588 +%0.9 (Thousand) (2019 10 M. Average-TURKSTAT)

**Time Zone:** GMT + 3

**Public Holidays:** January 1<sup>st</sup>, April 23<sup>rd</sup>, May 1<sup>st</sup>, May 19<sup>th</sup>, July 15<sup>th</sup>, August 30<sup>th</sup>, October 29<sup>th</sup>, Ramadan Feast, Sacrifice Feast

**GDP (PPP):** 2,346,576 million USD +%2,0 (2019-IMF)

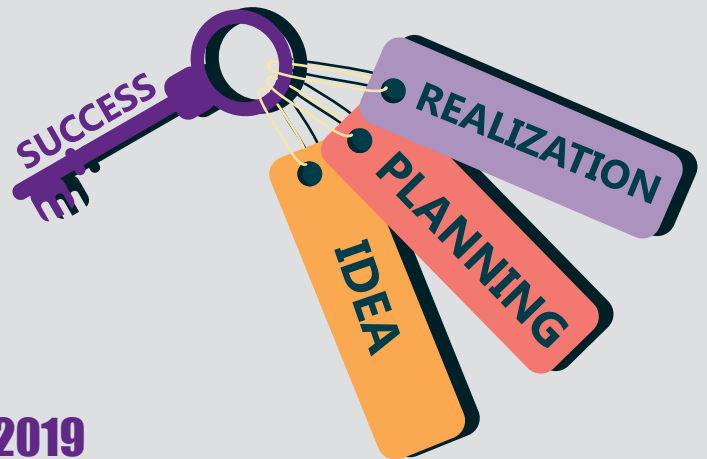
**GDP Per Capita:** 28,264 USD +%0,08

**Export:** 180 billion USD (2019-Turkish Exporters Assembly)

**Import:** 203 billion USD (2019 -TURKSTAT)



# TURKEY'S STRONG INDUSTRIAL BASE



## TURKEY'S EXPORT BY INDUSTRIES- 2019



### AUTOMOTIVE

Export Value **30.6 billion USD**  
Share in total export **%17.0**



### CHEMICALS & CHEMICAL PRODUCTS

Export Value **20.6 billion USD**  
Share in Total Export **%11.4**



### TEXTILE

Export Value **17.7 billion USD**  
Share in Total Export **%9.8**



### STEEL

Export Value **13.8 billion USD**  
Share in Total Export **%7.7**



### ELECTRICAL ELECTRONICS & SERVICES

Export Value **11.2 billion USD**  
Share in Total Export **%6.2**

**180 billion USD Total Export in 2019**

Turkey enjoys a significant advantage in trade due to its proximity to Europe as well as fast developing markets of the Middle East and Central Asia.

# ABOUT STEEL EXPORTERS' ASSOCIATION

Steel Exporters' Association is one of seven associations which has been operating under the body of General Secretariat of Istanbul Mineral and Metals Exporters' Association (IMMIB).

The Association is a non-profit business organization of more than 1750 companies representing the largest steel producers and exporters in the Turkish steel industry. It carries on its operations with the aim of increasing the export potential of the Turkish steel industry and paves the way for Turkish steel producers/exporters, with main objective to foster and attain sustainable global steel market based on free and fair trade. The Association also solves the problems of its member companies face at home and abroad, provides contact between members and foreign importers in order to ease the export processes, serves up-to-date domestic and global market news, reports and analyses.



**Our mission;** "Developing and implementing the strategies in order to increase the share of the Turkish steel exports in global markets and to maintain a sustainable global competitive strength."

**Our vision;** "Guiding and assisting the members of Turkish steel sector to become a leading industry in the global steel trade."

**Our values;** "Quality, reliability, continuous improvement and innovation."

established  
in  
2005

1787  
members

33.7  
million tons  
production

# TURKISH STEEL EXPORTER'S ASSOCIATION OPERATIONS



# TURKISH STEEL INDUSTRY

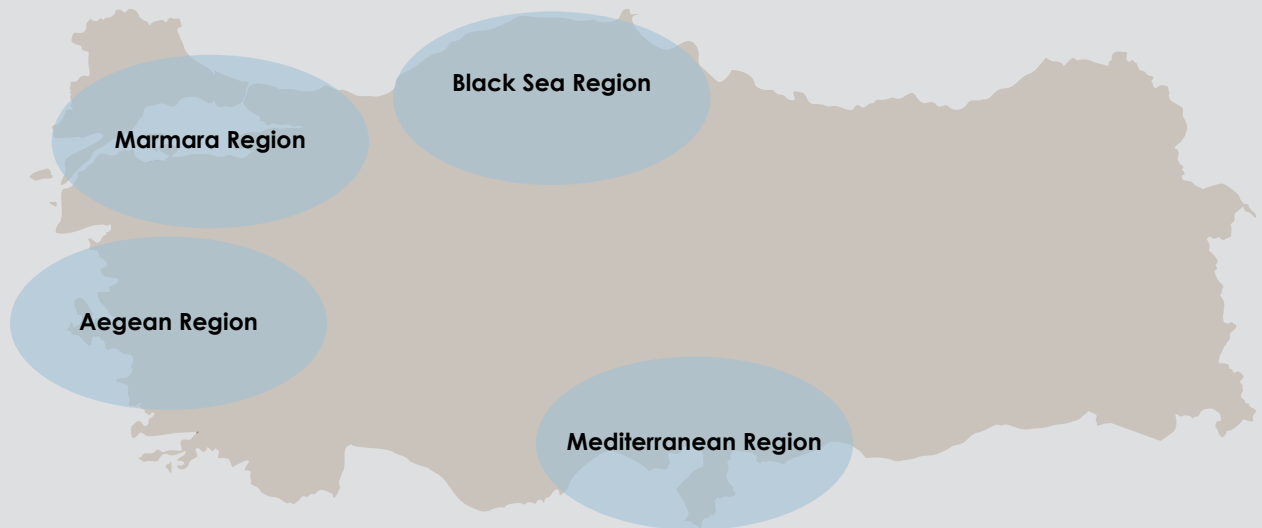
Today Turkey has 24 electric arc furnace mill plants (EAF), 7 induction furnace plants and 3 BOF plants.

In 2019, global output increased to 1.9 billion tons, up by 3.4% on 2018. Turkey's output was 33.7 million tons with a decrease of 9.6% in 2019.

In 1996, The European Coal and Steel Community (ECSC) agreement was signed between the EU and Turkey. With signing the agreement, customs duties on bilateral steel trade were abolished. The agreement allows Turkey to trade its iron and steel products without customs duty with all EU member states. Additionally, the Government does not subsidize Turkish domestic steel industry due to the European Coal and Steel Community (ECSC) agreement.

All steel companies in the country are privately held, and Turkish steelmakers continue to pursue technological developments to enhance the long-term viability of the industry in the global marketplace. The steel industry has become one of the most developed sectors in Turkey and today counts as the fourth largest contributor to the Turkish economy.

## TURKEY'S STEEL MAP

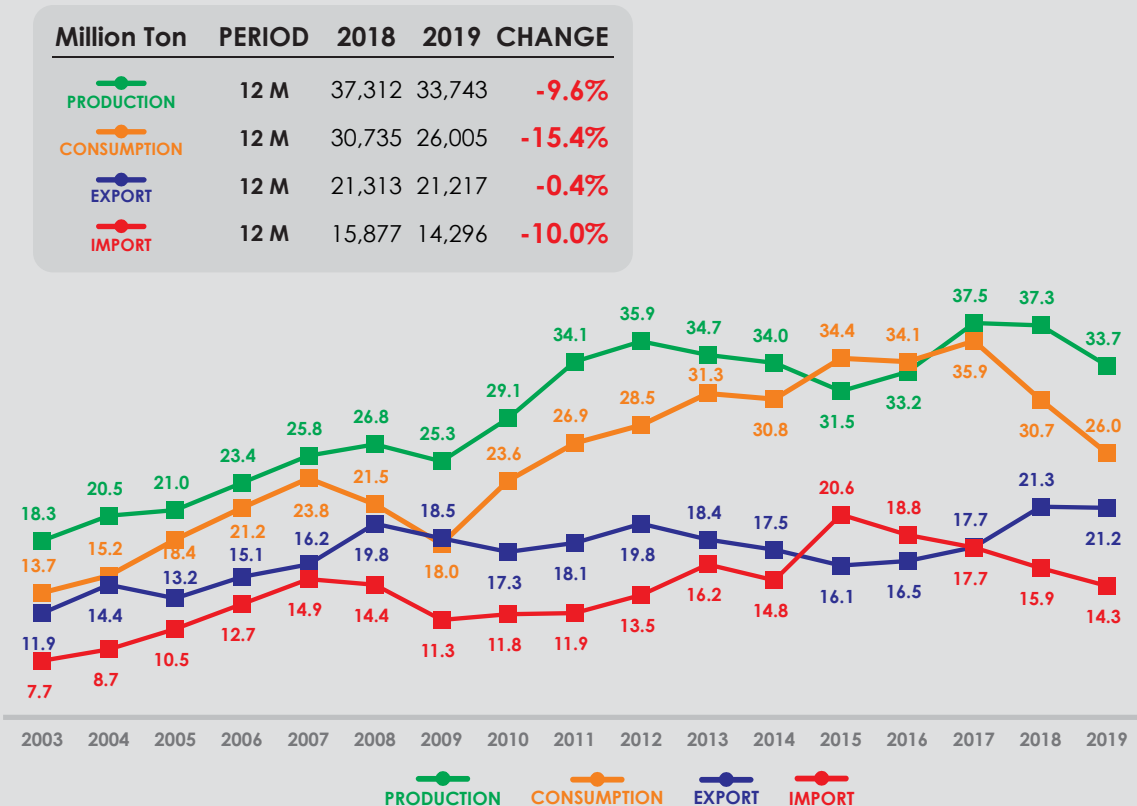


As of 2019, Turkey's total crude steel production capacity was 49,5 million tons.

# A GROWING INDUSTRY

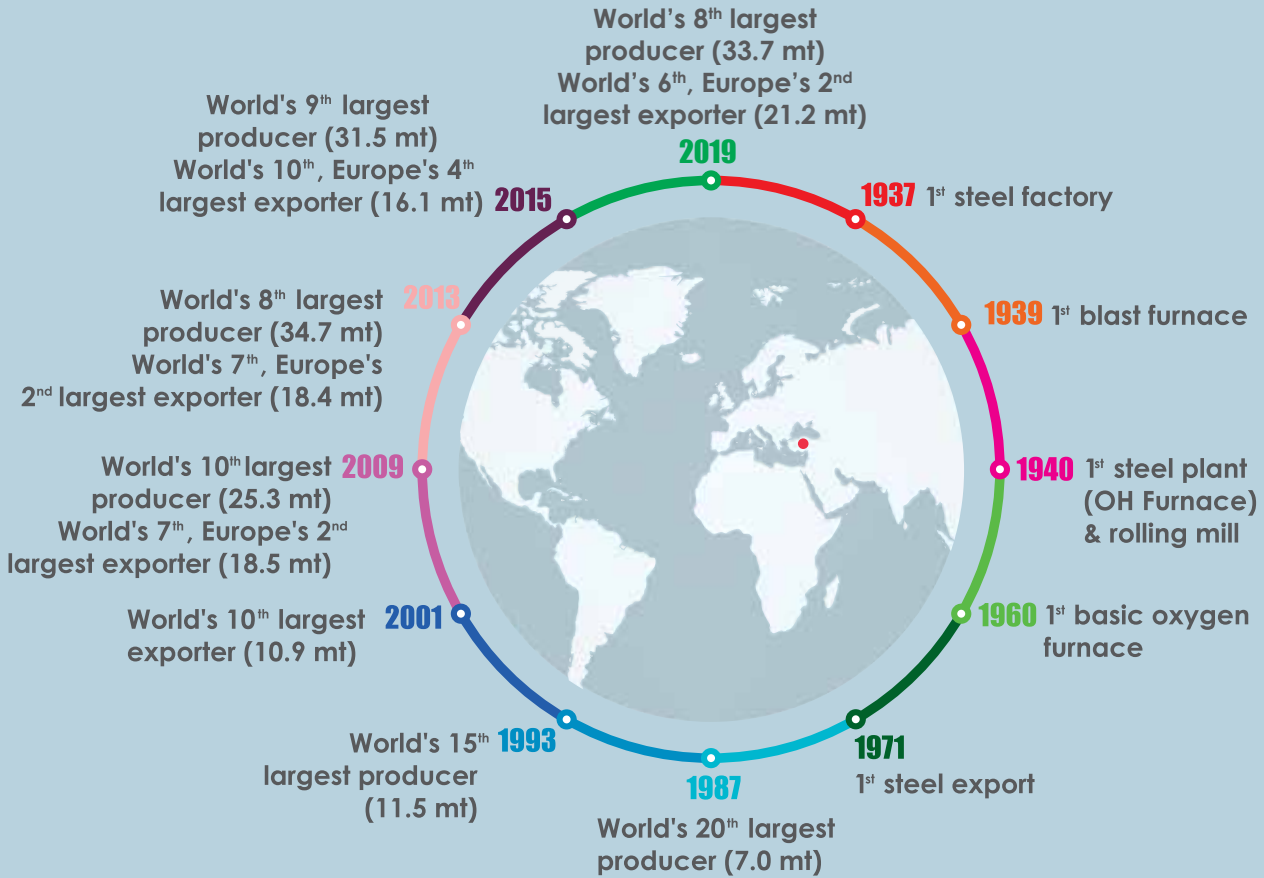
After 1980, with the implementation of import substitution system, Turkey has increased her steel export to primarily neighboring countries such as Iran, Iraq and North African countries. In the next 20 years, Turkey realized a major production and export boom. While Turkey was the world's 10<sup>th</sup> biggest steel producer in 2001, she has become the 8<sup>th</sup> biggest producer globally and 2<sup>nd</sup> largest steel producer in Europe in 2019. In fact, she was the third fastest growing steel producer in the world between 2001 and 2011, after China and India. Steel production in Turkey has increased significantly since 2001, growing from 15 million tons (mt) in 2001 to 33.7 million tons in 2019. Growth of the industry has been driven by strong domestic consumption. Turkey's crude steel consumption per capita has increased to 405 kg in 2019 and is expected to continue to growing in the medium-long terms. In addition to the strong domestic demand and dynamic steel using industries, Turkey's well placed position also supports exports and production.

## TURKISH STEEL INDUSTRY - OVERVIEW



SOURCE: Steel Exporters' Association, TCUD, WSA, TURKSTAT

# TIMELINE



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**TURKISH STEEL**  
— STEEL EXPORTERS' ASSOCIATION —



# WHY TURKISH STEEL?

## PRODUCTION CAPACITY

Proven to meet growing demand in the future Turkey is the 8<sup>th</sup> largest crude steel producer in the world.

Turkey's position at the Aegean Region and proximity to key industrial markets means it can respond to demand quickly and on time.

## PROXIMITY TO MARKETS

## MODERN INFRASTRUCTURE

Consolidated investments have provided Turkey a world-class infrastructure which enables the country to deliver its products faster.

Investments in technology provide state of the art production facilities and new production technologies mean that Turkey can offer quality products at consistently competitive prices.

## COMPETITIVE PRICING

## EXPERIENCED & SKILLED WORKFORCE

Excellent standards of training and education ensure an expert workforce for highest production standards.

Production techniques integrate world standard technological practices.

## LATEST TECHNOLOGIES

## CONTINUED INVESTMENTS

Turkey continues to invest in upgrading, enhancing and improving production methods and innovative products.

The industry is committed to meet global and local environmental standards without any course to state subsidies. 68% of Turkish steel production is carried out by electric arc furnaces. EAF steel production has lower CO<sub>2</sub> emissions intensity than production using BF/BOF. In this sense, Turkey is one of the few environment friendly steelmaker country in the world with 68% EAF route production, where average global EAF route production rate ranges between 28-29%.

## GREENER STEEL

# TURKISH STEEL INDUSTRY'S KEY FACTS AND FIGURES

**01** World's largest rebar exporter

World's 8<sup>th</sup> largest steel producer **02**

**03** The world's 6<sup>th</sup> biggest steel exporter

2<sup>nd</sup> largest producer of steel in Europe **04**

**05** Exports to 197 countries

World's largest importer of scrap metal **06**

**07** 68% of steel production is from steel scrap

Turkey's crude steel production was 33.7 million tons in 2019. **08**

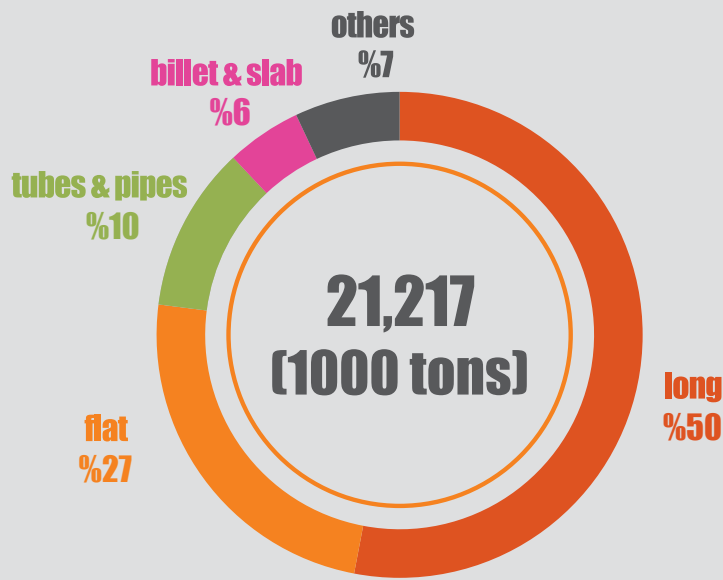
## TURKEY'S STEEL EXPORT BY REGION - 2019



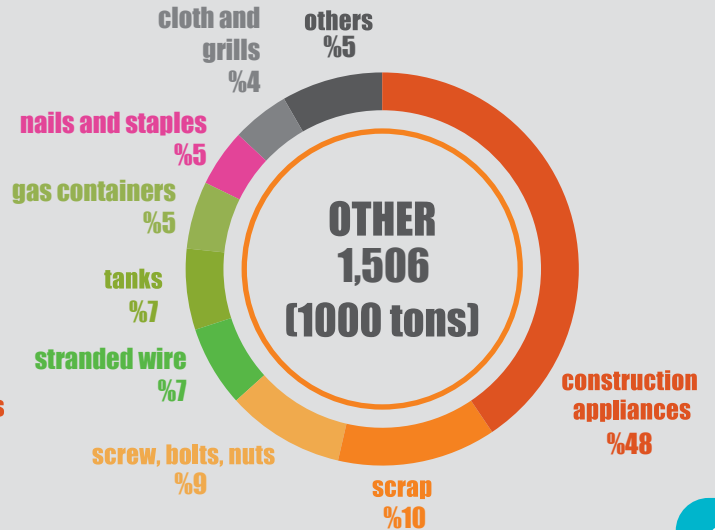
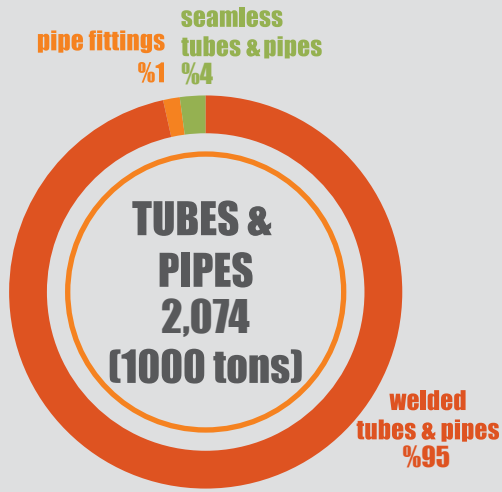
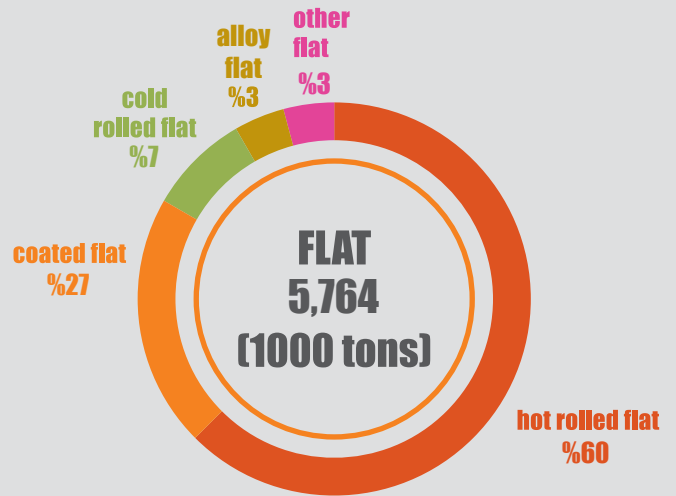
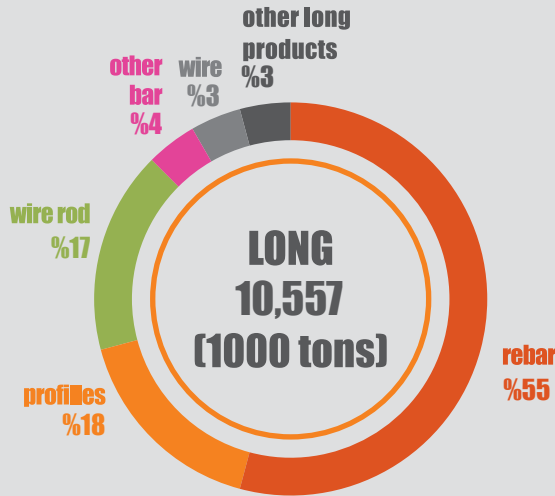
"21.2 million tons of steel export to 197 countries."



**TURKEY'S STEEL EXPORT BY  
PRODUCT GROUP 2019**



**TURKEY'S STEEL EXPORT BY  
PRODUCT 2019**



## TURKISH STEEL IN THE WORLD



Turkish steel manufacturers export to all over the world, due to competitive prices and effective marketing strategies. According to 2019 figures, Turkey's main export region is the European Union with 7.2 million tons by 16.2% decrease, making 34% of Turkey's total steel exports. Middle East is another main export destination of Turkish steel exports with 4.8 million tons and Turkey's export to the region increased by 26% in 2019. Turkey's steel export increased also to North Africa and Latin America by 41.7% and 9.5% respectively. On the other hand, Turkish steel exports to North America decreased by %67.7 in 2019.

### TURKISH STEEL IS BEING USED IN THE CONSTRUCTION OF WORLD'S MOST PRESTIGIOUS PROJECTS

#### **Burj Khalifa**

Dubai, United Arab Emirates

#### **Natural gas pipeline project**

Israel

#### **Infrastructure projects**

Dubai, United Arab Emirates

#### **Baku – Thilisi – Ceyhan (BTC) Crude Oil Pipeline Project**

#### **Heathrow Airport**

London, United Kingdom

#### **Automobile production**

#### **Hong Kong International Airport**

Hong Kong

#### **Production of the white goods and home appliances**

#### **BRUA natural gas pipeline project**

#### **Trans - Anatolian gas pipeline (TANAP)**

Turkey

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**SHAPE THE WORLD  
WITH  
TURKISH STEEL**



# TURKISH STEEL

— STEEL EXPORTERS' ASSOCIATION —

## STEEL EXPORTERS' ASSOCIATION

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Turkish Steel Exporters' Association



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