



2019 SHAPE THE WORLD WITH TURKISH STEEL



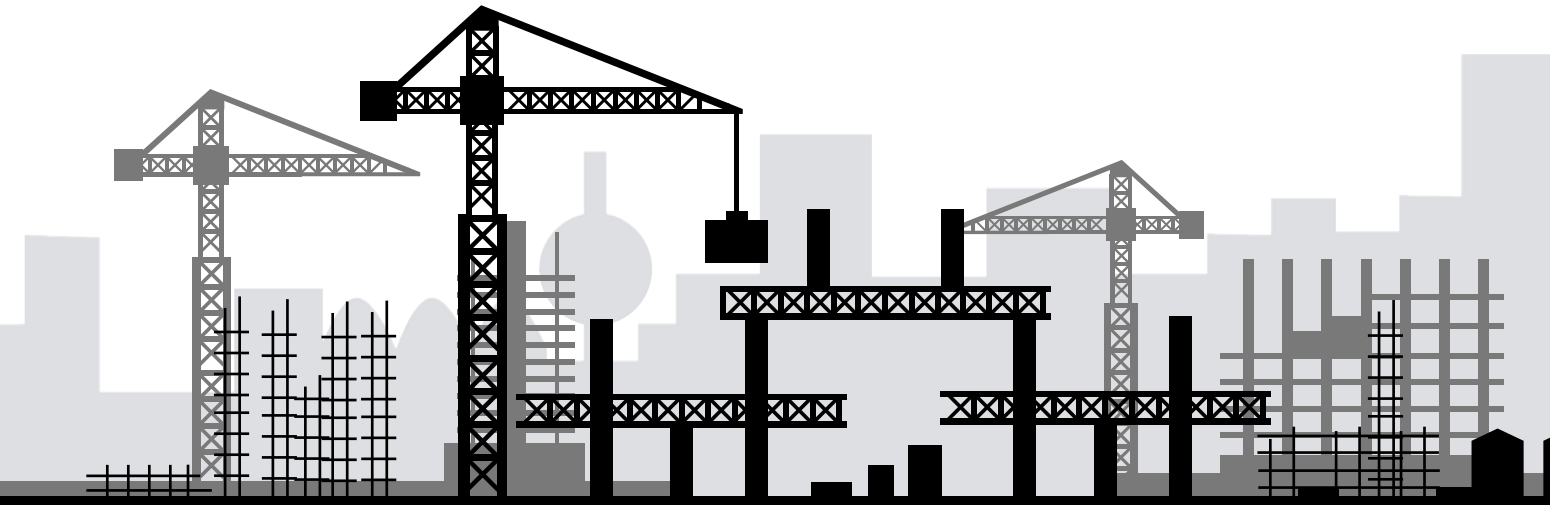
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REPUBLIC OF TURKEY
MINISTRY OF TRADE

Turkey

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the potential

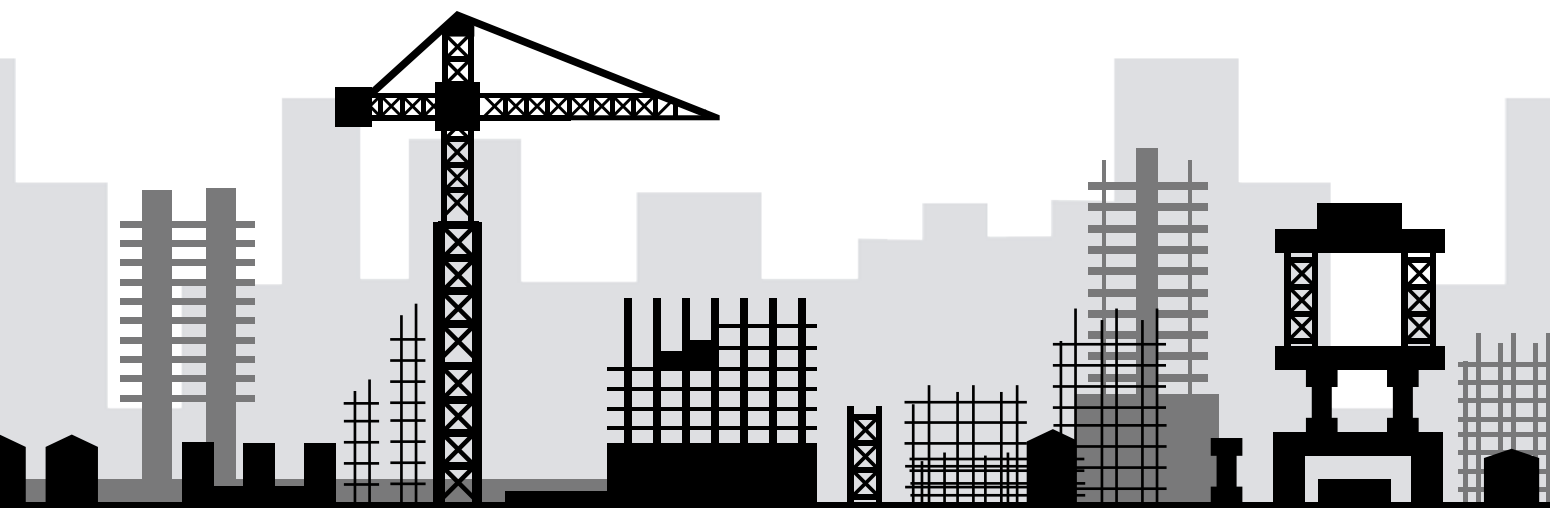


▶ **Europe's 2nd largest steel producer**

▶ **World's 2nd largest rebar exporter**

▶ **World's 8th largest steel producer**

▶ **The world's 6th biggest steel exporter**



Exports to 193 countries



World's largest importer of scrap metal



69% of steel production from steel scrap



37.3 million tons crude steel production in 2018

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: 82,003,882 +%1.5 (2018-TURKSTAT)

Civilian Labour Force: 32,658 +%3.2 (Thousand) (2018-TURKSTAT)

Time Zone: GMT + 3

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

GDP (PPP): 2,314,398 million USD +%5.9 (2018-IMF)

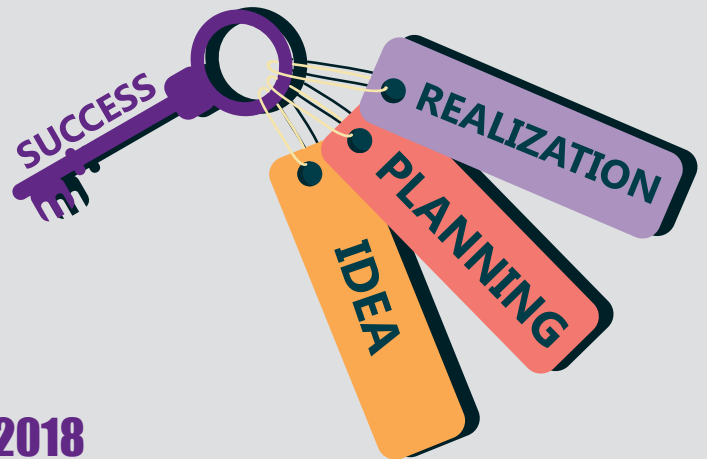
GDP Per Capita: 28,270 USD, +%4.5

19th biggest economy (2018 IMF)

Export: 168 million USD (2018-TURKSAT)

Import: 233 million USD (2018-TURKSAT)

TURKEY'S STRONG INDUSTRIAL BASE



TURKEY'S EXPORT BY INDUSTRIES- 2018



AUTOMOTIVE

Export Value **31.6 billion USD**
Share in total export **%18.8**



TEXTILE

Export Value **17.6 billion USD**
Share in Total Export **%10.5**



CHEMICALS & CHEMICAL PRODUCTS

Export Value **17.4 billion USD**
Share in Total Export **%10.3**



STEEL

Export Value **15.6 billion USD**
Share in Total Export **%9.3**



ELECTRICAL ELECTRONICS & SERVICES

Export Value **11.3 billion USD**
Share in Total Export **%6.7**

168 billion USD Total Export in 2018

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 1550 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

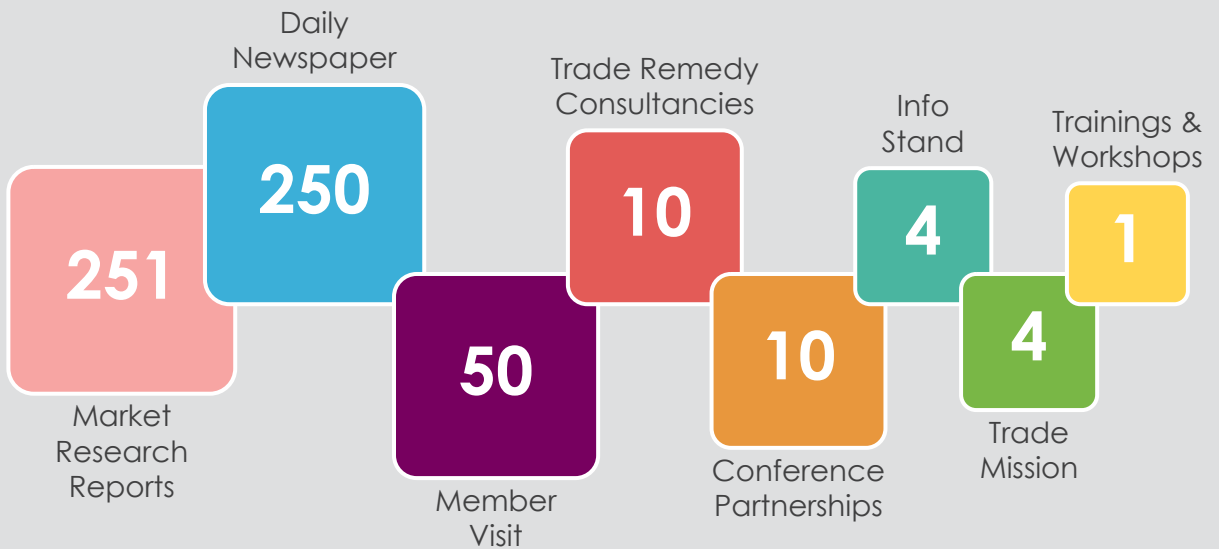
1568
members

37.3
million tons
production

TURKISH STEEL EXPORTER'S ASSOCIATION OPERATIONS



ACTIVITIES 2018



TURKISH STEEL INDUSTRY

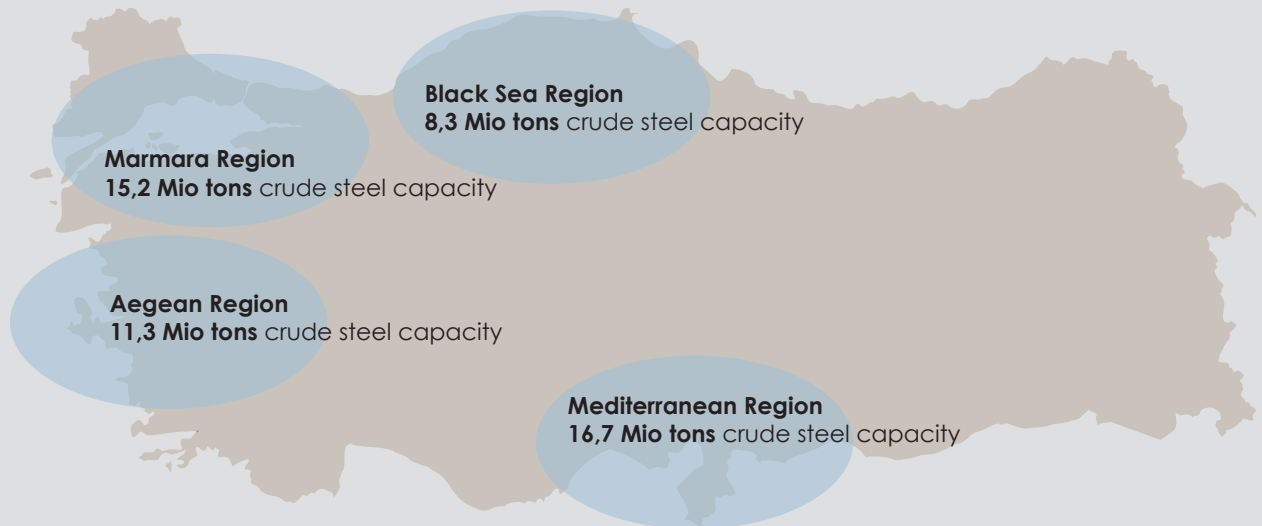
Today Turkey has 24 electric arc furnace mill plants (EAF), 5 induction furnice plants and its 3 BOF plants.

In 2018, global output increased 1,8 billion tons, up by 4.6% on 2017. She had a 0.6% decrease with 37.3 million tons in year 2018.

In 1996, The European Coal and Steel Community (ECSC) agreement 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.

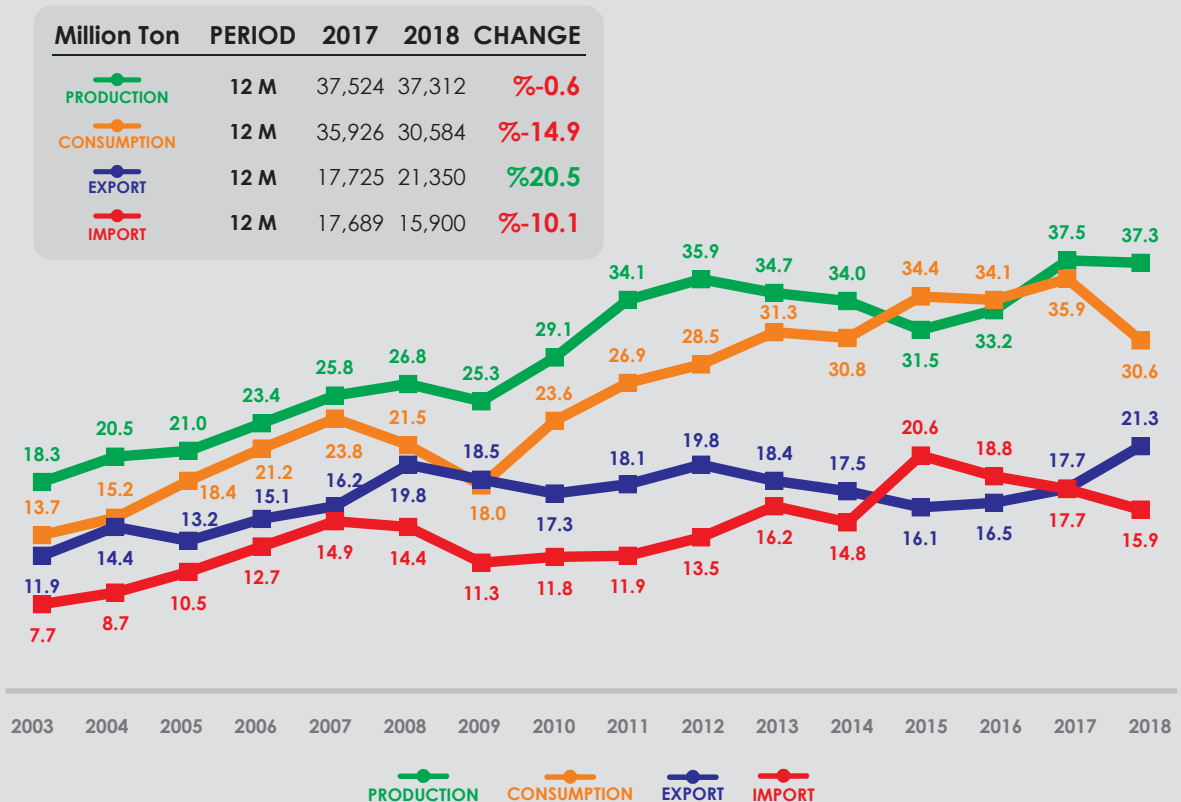
TURKEY'S STEEL MAP 2018



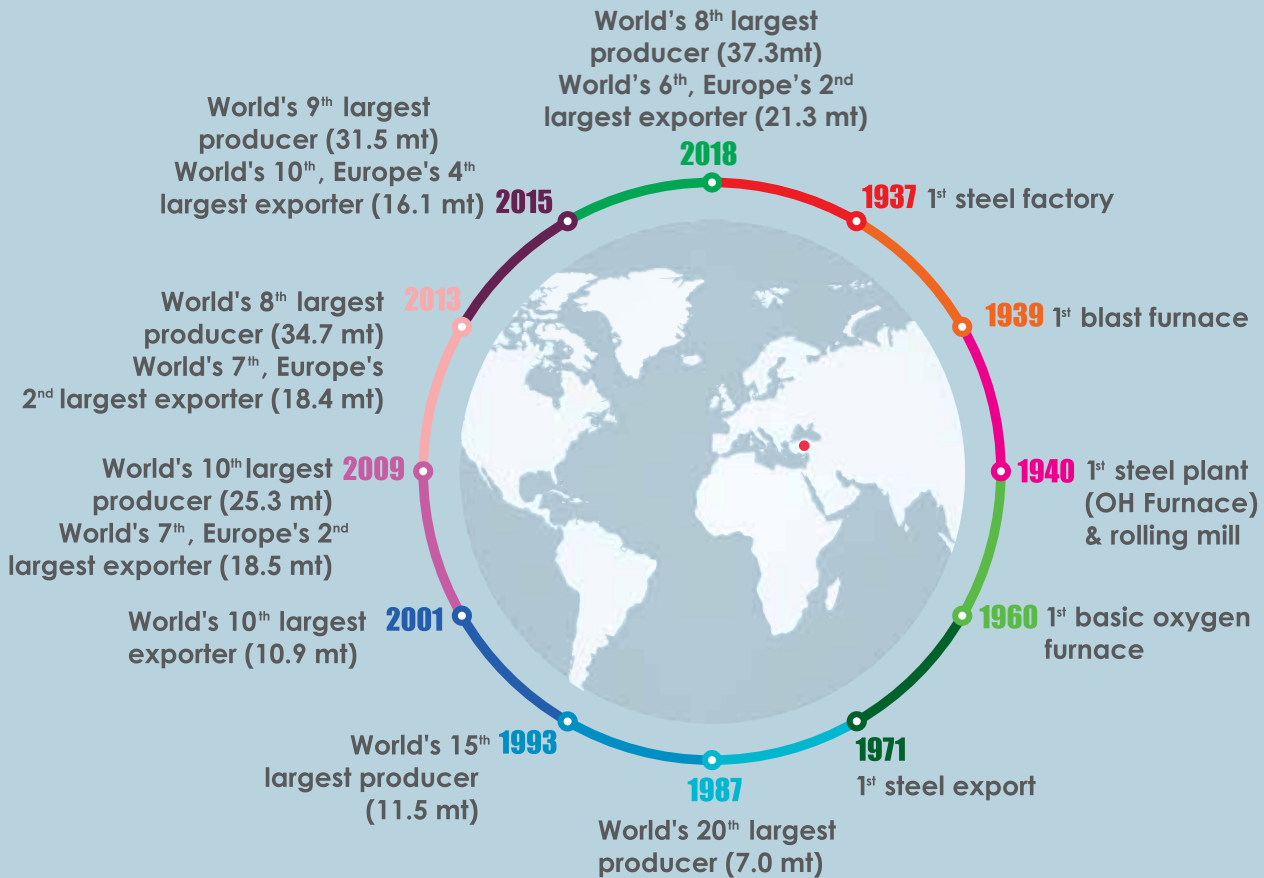
A GROWING INDUSTRY

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 10th biggest steel producer in 2001, she has become the 8th biggest producer globally and 2nd largest steel producer in Europe in 2018. 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 37.3 million tons in 2018. Growth of the industry has been driven by strong domestic consumption. Turkey's crude steel consumption per capita has increased to 455 kg in 2018 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



TIMELINE



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WHY TURKISH STEEL?

PRODUCTION CAPACITY

Proven to meet growing demand in the future Turkey is the 8th 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 all global and local environmental standards and without any recourse to state subsidies. Because 69% of Turkish Steel production is carried out by electric arc furnaces, the average CO₂ emission for producing 1 ton of crude steel in Turkey is 0.69 tons. This compares favorably with the global average of 1.5 tons.

GREENER STEEL

TURKISH STEEL INDUSTRY'S KEY FACTS AND FIGURES

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07 69% of steel production is from steel scrap

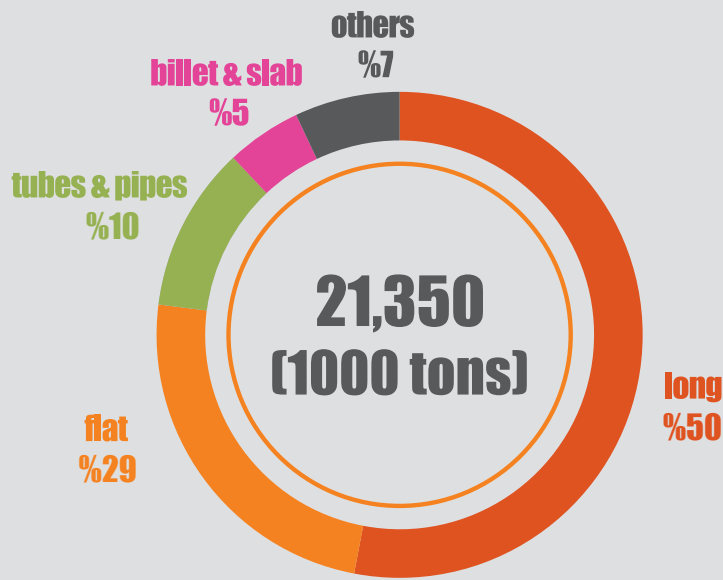
Turkey's crude steel production was 37.3 million tons in 2018. 08

TURKEY'S STEEL EXPORT BY REGION - 2018

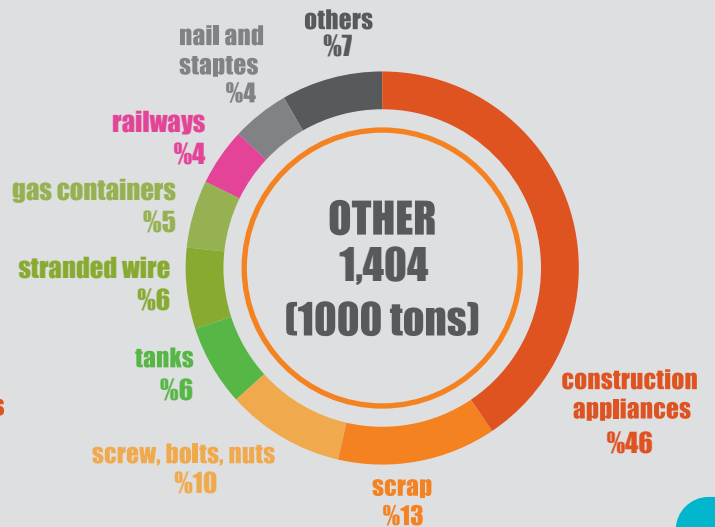
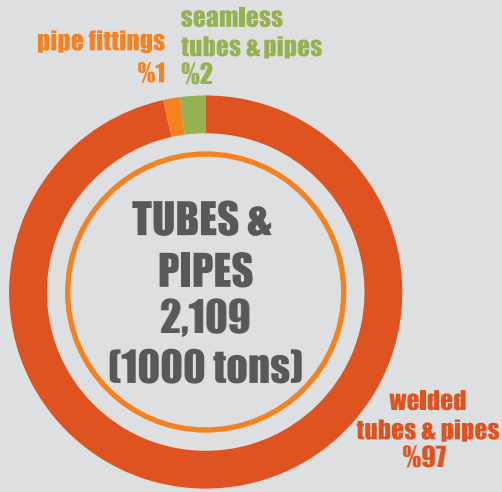
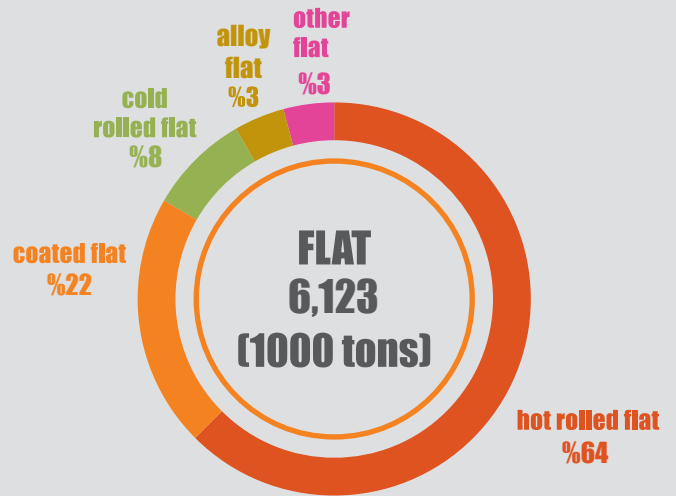
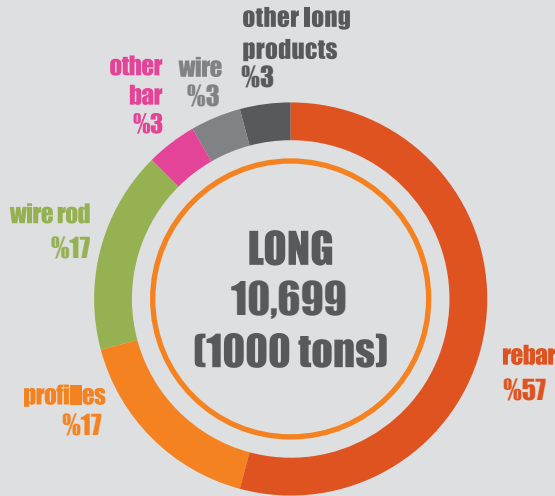


"21.3 million tons of steel export to 193 countries."

**TURKEY'S STEEL EXPORT BY
PRODUCT GROUP 2018**



**TURKEY'S STEEL EXPORT BY
PRODUCT 2018**



TURKISH STEEL IN THE WORLD



Turkish steel manufacturers export to all over the world, due to competitive prices and effective marketing strategies. According to 2018 figures, Turkey's main export region is the the European Union with 8.6 million tons by %54.4 increase and constituting 40% of Turkey's total steel exports. Middle East is another main export destination of Turkish steel exports with 3.8 million tons and Turkey's export to the region decrease 6.4% in 2018. Turkey steel export also decrease to North America by %15.2. On the other hand, in 2018, Turkish steel exports to Far East region and North Africa region increase by %34.5 and %5.1, respectively.

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)



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WITH
TURKISH STEEL**



TURKISH STEEL

— STEEL EXPORTERS' ASSOCIATION —

STEEL EXPORTERS' ASSOCIATION

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