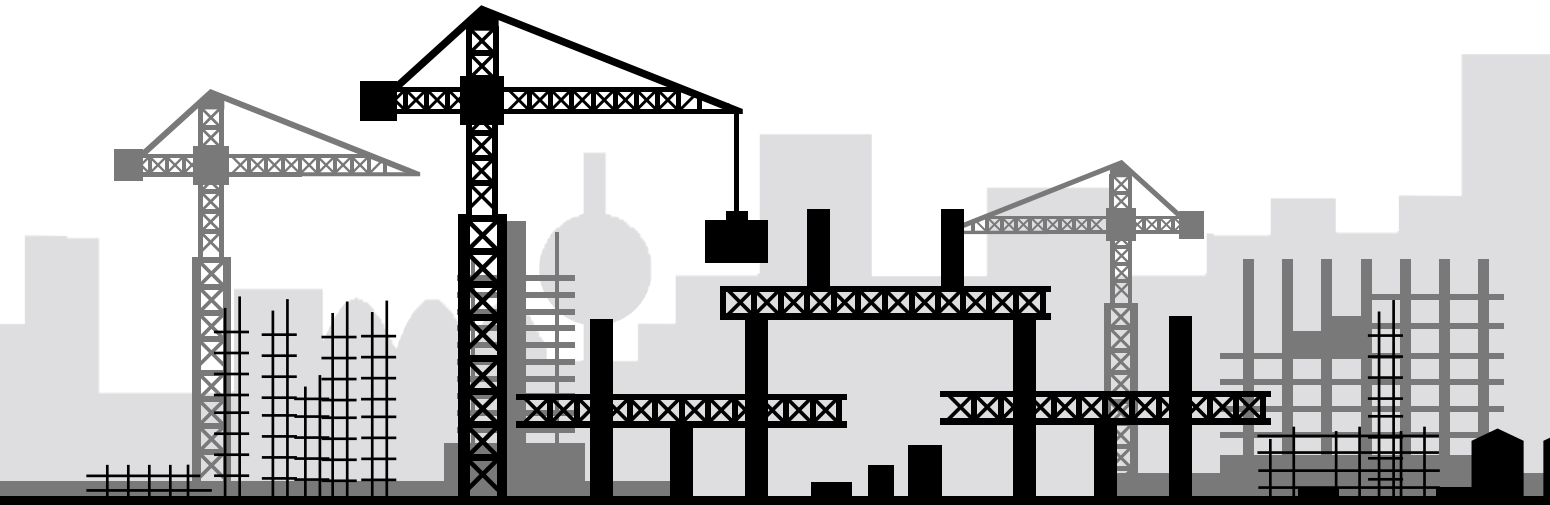
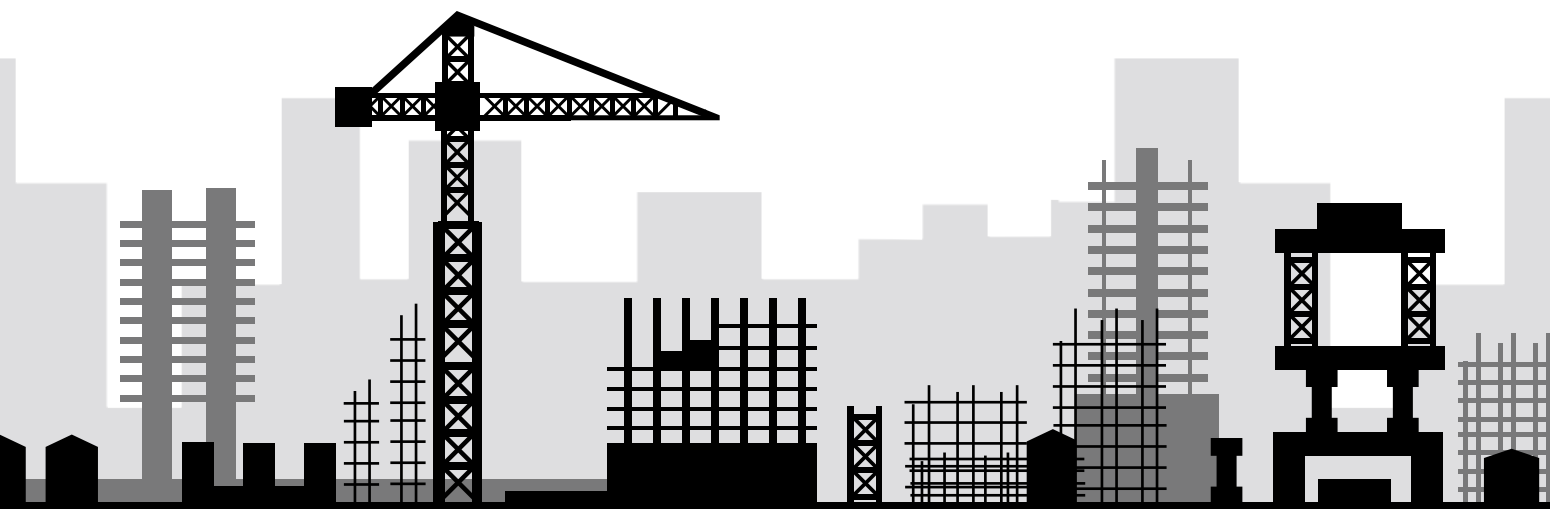


2021 SHAPE THE WORLD WITH TURKISH STEEL



- ▶ **Europe's largest steel producer**
- ▶ **World's largest rebar exporter**
- ▶ **World's 7th largest steel producer**
- ▶ **The world's 6th biggest steel exporter**



Exports to 197 countries



World's largest importer of scrap metal



69% of steel production from steel scrap



35.8 million tons crude steel production in 2020

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: 83,614,362

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 : 649 billion USD (2020e-IMF)

GDP (PPP): 2,382 billion USD (2020e-IMF)

GDP Per Capita: 7,715 USD (2020e-IMF)

Export: 170 billion USD (2020-Turkish Exporters Assembly)

Import: 220 billion USD (2020 -TURKSTAT)

TURKEY'S STRONG INDUSTRIAL BASE



TURKEY'S EXPORT BY INDUSTRIES- 2020



AUTOMOTIVE

Export Value **25.5 billion USD**
Share in total export **15.1%**



CHEMICALS & CHEMICAL PRODUCTS

Export Value **18.3 billion USD**
Share in Total Export **10.8%**



TEXTILE

Export Value **17.1 billion USD**
Share in Total Export **10.1%**



STEEL

Export Value **12.6 billion USD**
Share in Total Export **7.4%**



ELECTRICAL & ELECTRONICS

Export Value **11.1 billion USD**
Share in Total Export **6.5%**

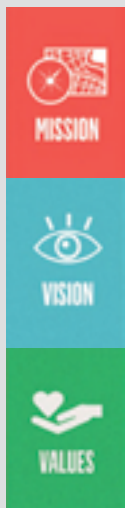
170 billion USD Total Export in 2020

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 2000 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

2033
members

35.8
million tons
production

TURKISH STEEL EXPORTER'S ASSOCIATION OPERATIONS



TURKISH STEEL INDUSTRY

Today Turkey has 26 electric arc furnace mill plants (EAF), 8 induction furnace plants and 3 BOF plants.

In 2020, global output decreased to 1.86 billion tons, down by 0.9% on 2019. Turkey's output was 35.8 million tons with an increase of 6.0% in 2020.

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.

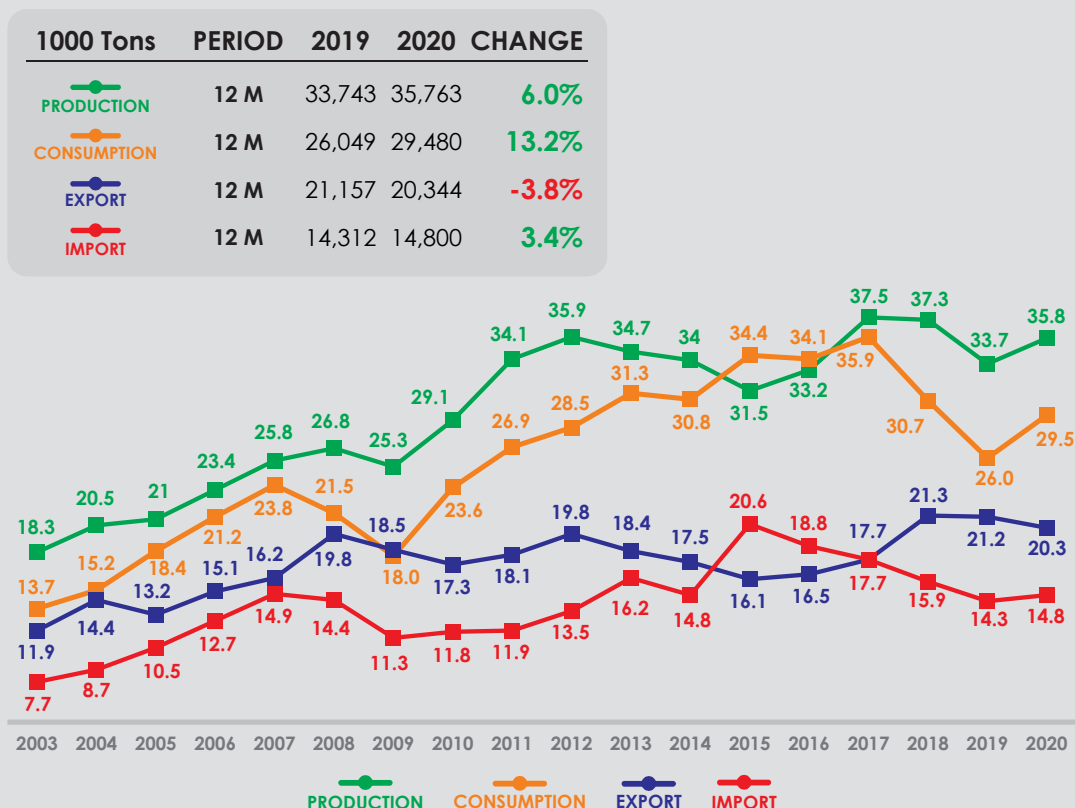
TURKEY'S STEEL MAP



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 7th biggest producer globally and largest steel producer in Europe in 2020. 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 35.8 million tons in 2020. Growth of the industry has been driven by strong domestic consumption. Turkey's crude steel consumption has increased by 13.2% to 29.5 million tons in 2020 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.

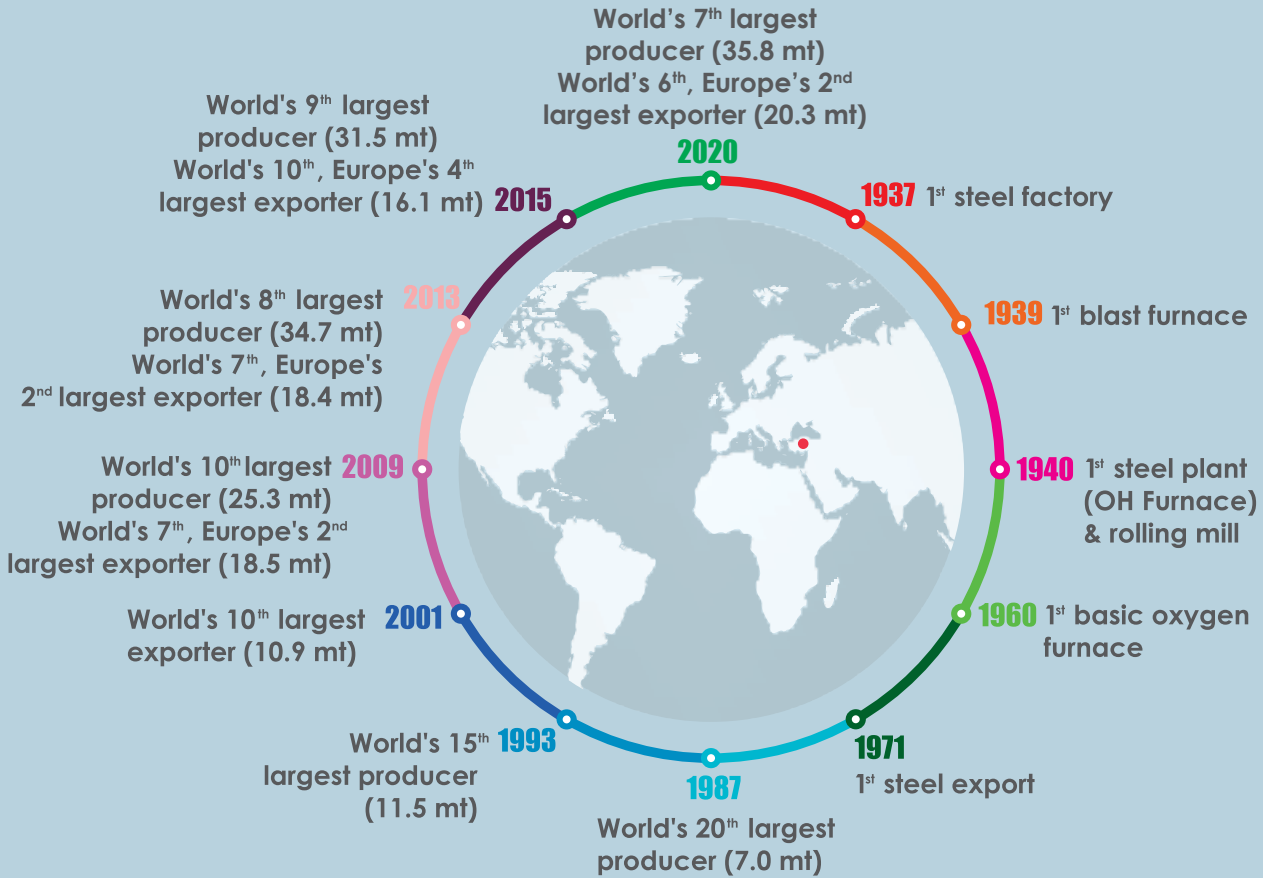
TURKISH STEEL INDUSTRY - OVERVIEW



Quantity: Million Tons

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

TIMELINE





WHY TURKISH STEEL?

PRODUCTION CAPACITY

Proven to meet growing demand in the future Turkey is the 7th 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. 69% of Turkish steel production is carried out by electric arc furnaces. EAF steel production has lower CO₂ emissions intensity than production using BF/BOF. In this sense, Turkey is one of the few environment friendly steelmaker country in the world with 69% EAF route production, where average global EAF route production rate is 29%.

GREENER STEEL

TURKISH STEEL INDUSTRY'S KEY FACTS AND FIGURES

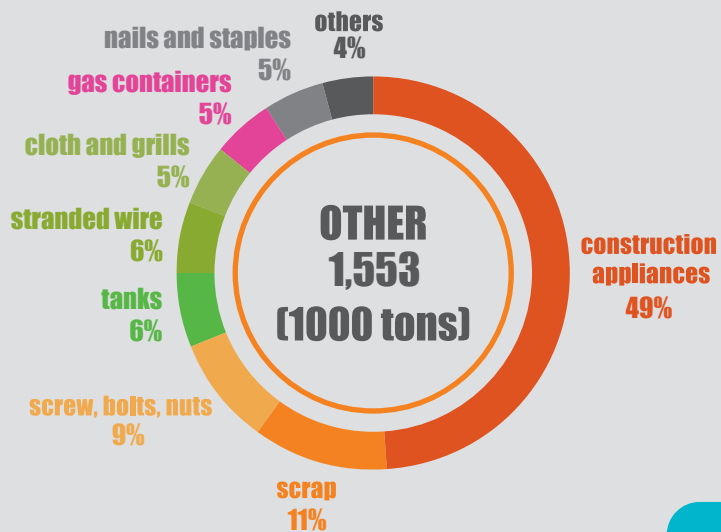
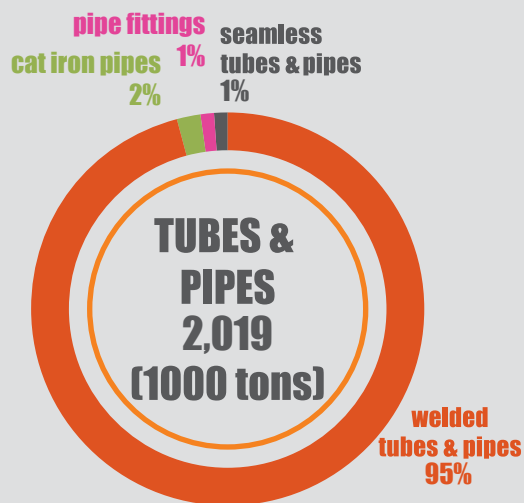
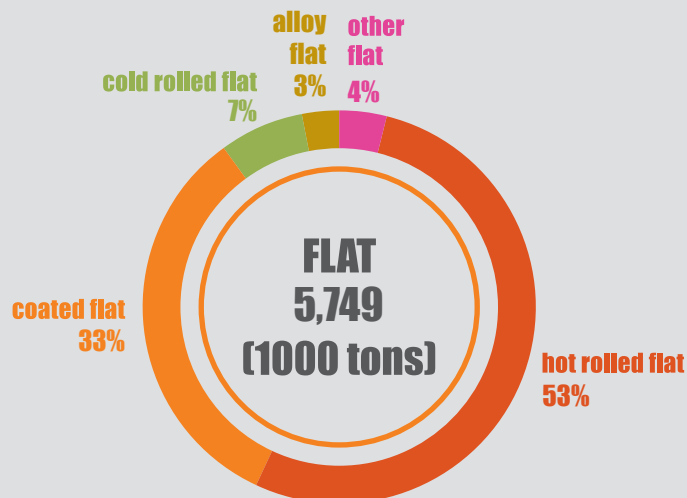
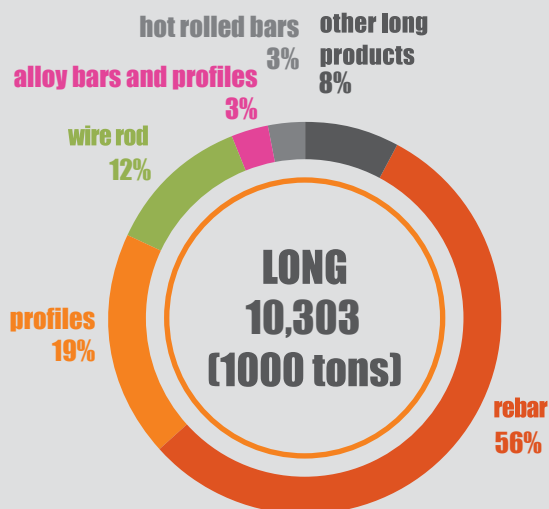
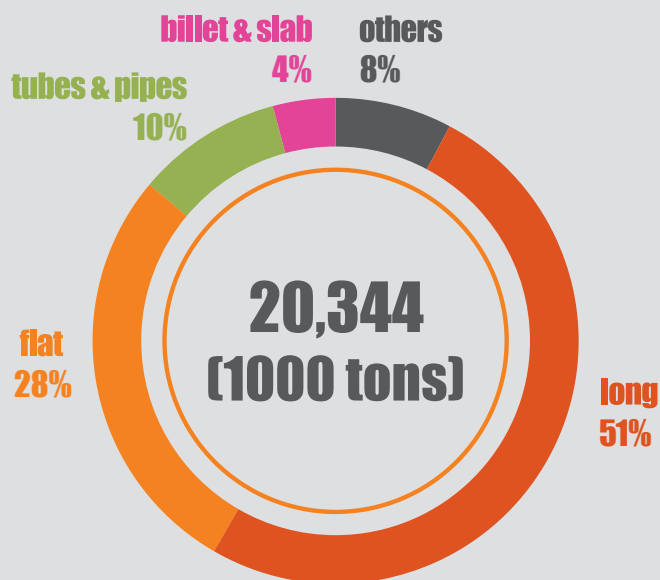


TURKEY'S STEEL EXPORT BY REGION - 2020



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

TURKEY'S STEEL EXPORT BY PRODUCT GROUP 2020



TURKEY'S STEEL EXPORT BY PRODUCT 2020



TURKISH STEEL IN THE WORLD

Turkish steel manufacturers export to all over the world, due to competitive prices and effective marketing strategies. According to 2020 figures, Turkey's main export region is the European Union with 5.8 million tons by 18.7% decrease, making 29% 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 0.2% in 2020. Turkey's steel export decreased to North Africa and Latin America by 11.8% and 3.1% respectively. On the other hand, Turkish steel exports to North America increased by 53.2% in 2020.

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)



**SHAPE THE WORLD
WITH
TURKISH STEEL**



STEEL EXPORTERS' ASSOCIATION

Çobançeşme Mevkii, Sanayi Cad. Dış Ticaret Kompleksi A Blok P.K.34197
Yenibosna – Bahçelievler / İstanbul / TURKEY
Phone: +90 212 454 00 00 Fax: +90 212 454 00 01 E-mail: cib@cib.org.tr



@Turkish_Steel



@Turkishsteel



Turkish Steel Exporters' Association



www.cib.org.tr