



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



BUILDING MATERIALS



TURKEY

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BUILDING MATERIALS

Construction is one of the key sectors in Turkey, being one of the main drivers of private and public investments in Turkey. As a result of economic reforms Turkey has established a large and strong construction industry in a short time. Today, Turkish construction and engineering companies are able to design, erect, build and operate almost all kinds of civil and industrial projects such as dams, hydroelectric and thermal power plants, industrial plants, airports and seaports, large scale petroleum and natural gas pipelines, fertilizer plants, petrochemical complexes and refineries, motorways, tunnels, bridges, large housing projects, hotels and all kinds of sophisticated buildings. Turkish contractors have achieved a volume of work exceeding US\$ 19,6 billion in 2011 in 43 foreign countries spread over four continents.

The concepts of advanced technology, on-time delivery, quick response, high quality, use of reasonably priced Turkish labor and goods, and equipment and building materials of international standards have enabled the Turkish construction sector to compete with the world.

Turkey is a major producer of basic construction materials such as cement, building steel, timber, bricks, PVC, polyethylene, glass, ceramic tiles and sanitary ware, being especially strong and competitive in producing construction steel, cement, ceramic and glass products.

BASIC CONSTRUCTION MATERIALS

Iron and Steel

Turkey has a huge iron and steel industry, which produces major inputs for the construction industry. Turkey's steel production rose 34.1 million tons in 2011. There are 29 firms, and more than 35.000 people are employed in the sector.

6.2 billion tons of long products exported in 2011, and major markets for long products are the UAE, Iraq, Singapore, Egypt and Israel.

Turkey produces different types of iron and steel pipes / pipe fittings. Turkey's iron and steel pipes / pipe fittings exports reached US\$ 1.8 billion in 2011. Major markets for iron and steel pipes / pipe fittings are the USA, Iraq, The United Kingdom, Czech Republic and Romania.

Cement

Cement, which is the basic construction material, is produced by 67 cement plants in Turkey. 19 of them are grinding units and the rest are integrated units. After the privatization program, capacity expansion and investments in technology in the sector accelerated. These positive developments has brought the quality of cement up to international standards.

In 2010 Turkey's cement export ranked first in the world. In 2010 the Turkish cement industry reached an annual production of 62.7 million tons. Turkish cement industry provides employment for more than 15 thousand employees.

In 2011, export earnings of the sector reached US\$ 914 million. In 2011 major markets for Turkish cement exports were Iraq, Syria, Russia, Brazil and Israel.

Natural Stones

Turkey's total probable marble reserves are 5.1 billion m³ –13.9 million tons. Turkey has a 33% share in the world's marble reserves.

In Turkish natural stone sector, there are about 1.500 mines, 2.000 plants and 9.000 workshops. The sector has also more than 300 thousand employees.

Total natural stone exports were US\$ 1.7 billion in 2011. Processed marble ranks first with US\$ 814 million exports in natural stone exports. In 2011 the main countries which Turkey exported processed marble to were the USA, Iraq, Saudi Arabia, the United Kingdom, Canada, and France.

Ceramic

Ceramics are amongst Turkey's oldest and best-known products. Turkey's share in world ceramic tiles production rose to 3,2%. There were also 30 thousand employments in the sector. Ceramic tile exports valued US\$ 521 million in 2011.

Turkey ranks first in Europe in the production of ceramic sanitaryware, as well. Sanitaryware production reached 17 million units in 2011. Sanitaryware exports were about US\$ 178 million in 2011. Turkey ranks first in Europe in the exports of sanitaryware in 2011.

Glass

The glass industry is one of the most important and highly developed industries in Turkey. Today, a group of companies, namely, Sisecam, accounts for approximately 90% of annual production. There are about 20 large and medium-scale firms dealing with production in the sector other than Sisecam and a certain number of small ones are also involved in production. The glass sector has approximately 20 thousand employees.

The Turkish glass industry has a highly intensive production technology and a vast accumulation of know-how combined with a high level of production capacity, good quality and wide sales services. Sisecam ranks 6th in Europe and 13th in the world in the glass production capacity.

The industry has shown an increasing trend in production in recent years and building glass production capacity was approximately 2,9 million tons in 2010.

Exports of the glass industry have been increasing continuously and totaled US\$ 124 million in 2011. The major export countries are Iraq, Azerbaijan, Israel, Turkmenistan and Russia.

Plastic-based Building Products

The domestic production of basic plastic raw materials has naturally resulted in a strong plastic processing industry in Turkey. At present, there are about 5,000 plastics processing

companies, which are mainly small and medium-scale. In the plastic sector, more than 200 thousand people have been employed.

In 2011, US\$ 1.1 billion worth of plastic building materials were exported. The plastic building materials were exported mainly to Iraq, Russia, Azerbaijan, Turkmenistan and Georgia.

The Turkish plastic sector today has attained world standards as far as raw materials, semi-finished and finished products are concerned. Finished plastic products are expected to comply with the related Turkish standards (TSE), International standards (ISO) and the standards set by the EU.

Paints and Coatings

Parallel to the developments in the construction, automotive and marine industries of Turkey, the paints and coatings industry has also developed and has become one of the most dynamic sectors of the Turkish Industry.

In 2011 the total value of paints and coatings' exports reached US\$ 364 million. The paints and coatings industry products were exported mainly to Iraq, Iran, Azerbaijan, Romania and Georgia.

The paint sector has reached world quality standards. The number of firms which have ISO 9000 certification is rapidly increasing in Turkey. The dyes and paints sector has adapted itself to ecological standards which are particularly developed in Europe.

EXPORTS

Building materials exports reached about US\$ 19.7 billion in 2011 with 20% growth.

Iron and steel products with an export value of US\$ 10 billion were the largest product group in sector exports. Within this group, iron & steel bars, sections and wires (US\$ 6.2 billion) rank first, and pipes and pipe fittings (US\$ 1.8 billion) rank second by value. Insulated wires with an export value of US\$ 1.5 billion were one of the largest product groups. Plastic-based building products exports also ranked high with a value of US\$ 1.2 billion in 2011.

Turkey's Exports of Major Building Materials (Value: US\$ 1,000)

| | 2009 | 2010 | 2011 | Share in 2011 among countries (%) |
|---|-----------|-----------|-----------|---|
| Gypsum | 67.406 | 68.707 | 72.117 | Russia (25), Ukraine (17) Nigeria (10), Turkmenistan (7) Georgia (7) |
| Cement | 1.200.822 | 1.131.081 | 914.441 | Iraq (25), Syria (14) Russia (6), Israel (5) Brazil (4) |
| Paints | 249.552 | 312.902 | 364.318 | Iraq (16), Iran (12) Azerbaijan (9), Georgia (7) Romania (5) |
| Plastic based building materials | 924.312 | 971.145 | 1.154.004 | Iraq (18), Russia (10) Azerbaijan (6), Turkmenistan (5) Georgia (5) |
| Wood based building materials | 327.014 | 372.988 | 423.369 | Iran (34), Iraq (16) Azerbaijan (8), Turkmenistan (7) Georgia (5) |
| Wall papers | 9.210 | 11.170 | 10.632 | Iran (56), Iraq (11) Azerbaijan (6), Spain (2) TRNC (2) |
| Processed natural stones (Marble, granite) | 742.355 | 814.584 | 864.825 | The USA (27), Iraq (9) S. Arabia (7), France (5) The United Kingdom (5) |
| Mineral wools | 16.341 | 19.556 | 19.190 | Azerbaijan (15), Turkmenistan (14) Iraq (14), Egypt (7) Israel (7) |
| Articles of asphalt, plaster, cement and concrete | 109.953 | 118.719 | 135.686 | Iraq (20), Azerbaijan (11) Turkmenistan (6), Algeria (4) Syria (3) |
| Bricks | 6.847 | 6.791 | 6.767 | The United Kingdom (27) Iraq (18), Azerbaijan (14) TRNC (11), Iran (6) |
| Ceramic tiles | 390.801 | 467.770 | 521.109 | Germany (13), Israel (11) The United Kingdom (9) Iraq (7), Azerbaijan (6) |
| Ceramic sanitaryware | 139.037 | 156.860 | 178.557 | Germany (14), Italy (11) France (11), The United Kingdom (10) Iraq (6) |
| Glass | 93.087 | 118.325 | 124.141 | Iraq (11), Azerbaijan (7) Israel (7), Russia (6) Turkmenistan (5) |
| Glass wool | 76.707 | 92.731 | 100.384 | Germany (16), Italy (12) France (8), Russia (4) Egypt (4) |
| Iron and steel bars, sections and wires | 4.935.541 | 4.533.026 | 6.239.125 | The UAE (13), Iraq (12) Singapore (6), Israel (5) Egypt (4) |
| Iron and steel nails, bolts, nuts, screws etc. | 158.991 | 215.851 | 292.790 | Germany (34), France (4) Iran (4), Slovakia (4) Turkmenistan (3) |
| Iron and steel sanitaryware | 62.223 | 73.553 | 82.720 | Russia (11), Iraq (10) Iran (7), Egypt (6) |

| | | | | |
|---|-------------------|-------------------|-------------------|---|
| | | | | Azerbaijan (6) |
| Iron and steel pipes / pipe fittings | 1.521.823 | 1.587.343 | 1.776.133 | The USA (12), Iraq (12) The United Kingdom (8) Czech Rep. (7), Romania (6) |
| Iron and steel radiators | 381.746 | 399.154 | 447.596 | The United Kingdom (27) Romania (9), Ukraine(8) Germany (7), Poland (5) |
| Iron and steel based other building materials | 990.033 | 923.165 | 1.102.177 | Iraq (19), Turkmenistan (13) Azerbaijan (9), Tunisia (4) Canada (3) |
| Aluminum sanitaryware | 53.718 | 54.371 | 60.283 | Italy (14), Iraq (11) Egypt (10), Azerbaijan (7) Netherlands (5) |
| Aluminum based building materials | 651.311 | 739.653 | 835.048 | Germany (25), Iraq (11) Azerbaijan (6), Turkmenistan (5) Bulgaria (3) |
| Locks and metal mountings | 336.509 | 415.435 | 496.718 | Russia (11), Iran (11) Germany (8), Romania (7) Ukraine (6) |
| Heating and cooling equipment | 558.320 | 603.858 | 791.349 | Germany (17), Russia (12) The United Kingdom (8) Italy (6), Spain (6) |
| Elevators | 19.113 | 21.805 | 35.145 | Iran (15), Russia (12) Iraq (12), Kazakhstan (8) Georgia (7) |
| Taps, Valves And Similar Appliances | 186.262 | 219.453 | 273.164 | Germany (16), Iraq (9) Iran (7), Russia (7) Egypt (5) |
| Electrical apparatus | 330.153 | 380.290 | 506.713 | Italy (14), Russia (13) Germany (8), Ukraine (7) Iraq (6) |
| Insulated cables | 859.124 | 1.175.221 | 1.450.300 | The United Kingdom (22) Iraq (14), Israel (8) Turkmenistan (6), Germany (5) |
| Lightening fittings | 193.896 | 207.918 | 238.004 | Turkmenistan (11) Azerbaijan (10), Iraq (10) Germany (6), Russia (5) |
| Prefabricated buildings | 196.560 | 163.812 | 214.104 | Iraq (25) Russia (11) Turkmenistan (11) Azerbaijan (10), Afghanistan (6) |
| Total | 15.788.767 | 16.377.236 | 19.730.910 | Iraq (12), Germany (5) The UAE (5), England (5) The USA (4) |

Source: Turkish Statistical Institute - TurkStat

Turkish building materials were exported to about 200 countries in 2011. The main export markets are Iraq, Germany, the UAE, the United Kingdom, and the USA.

Turkish building materials are exhibited in international and local fairs organized in Turkey. In 2012, 10 main building materials related fairs, which are listed below, will be organized in Turkey.

TRADE FAIRS IN TURKEY

- Eurasia Floor - 12th Floor Covering Materials Sector Fair
March, Gaziantep
- Unicera 24th International Ceramic, Bathroom, Kitchen Fair
March, Istanbul
- Kitchen World 2012 8th International Kitchen, Bathroom Furniture, And Built-In Appliances Fair-March, Istanbul
- 6. Yapidecoor Ankara 2012
March, Ankara
- Isk - Sodex 2012
May, Istanbul
- 35. International Yapi / Turkey Build 2012 İstanbul –
May, Izmir
- Yapitech 2012 - 11st International Build Product And Technology Expo –
May, Trabzon
- 25th International Yapi / Turkeybuild 2012 Ankara Fair
September, Ankara
- 18th International Yapi / Turkeybuild 2012 İzmir Fair
October, Izmir
- 20. International Yapex - Building Materials, Construction Technology And Building Renovation - October, Antalya.

USEFUL LINKS

- Republic of Turkey Ministry of Science, Industry, and Technology
www.sanayi.gov.tr
- Turkish Statistical Institute
www.tuik.gov.tr
- The Association of Real Estate Investment Companies
www.gyoder.org.tr
- Turkish Contractors Association
www.tmb.org.tr
- Turkish Ceramic Federation
www.serfed.com
- Association of Turkish Building Material Producers
www.imsad.org
- Turkish Iron and Steel Producers Association
www.d cud.org.tr
- Turkish Cement Manufacturers' Association
www.tcma.org.tr
- International Trade Center
www.trademap.org
- Building – Industry Centre – Turkish Building Sector Report 2011
www.yapiveri.com



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