



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY

INDUSTRY



CONSTRUCTION AND MINING MACHINERY



TURKEY
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CONSTRUCTION AND MINING MACHINERY

Construction is one of the key sectors in Turkey, being one of the main drivers of private and public investments. As a result of economic reforms, Turkey has established a large and strong construction industry in a short time.

Apart from the Middle East and North African market in which Turkish contractors have a great share of civil engineering and electromechanical erection work, the former USSR and some European countries have opened their construction market to Turkish contractors. Today, Turkish contractors work in four continents and over 70 countries, using all the financial, managerial and technological instruments of international contracting standards.

The development of construction industry has resulted in a large and diversified production capacity in building materials sector, a dynamic contracting and engineering services and a young but well-established construction and mining machinery sector.

Growth of the construction and mining machinery sector closely depends on the development of the construction sector. 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, fertiliser plants, petrochemical complexes and refineries, motorways, tunnels, bridges, large housing projects, hotels and all kinds of sophisticated buildings. Since 1970, Turkish contractors have completed about 6.500 projects in 93 countries. Total value of the projects undertaken by Turkish contractors abroad has reached \$205 billion.

Turkey is among the world's richest countries in minerals. Excluding petroleum and coal, there are approximately 4.400 mineral deposits in Turkey while 53 different minerals are produced. Turkey is a major producer of boron minerals, feldspar, marble, barite, celestite, emery, limestone, magnesite, perlite, pumice, copper and chromite. Modern production equipment as well as new technologies and methods has been very important factors in the development of the mining sector in Turkey. Improvements in the mining sector, especially in marble production, have accelerated the growth of the mining machinery sector.

PRODUCTION

Turkish construction and mining machinery industry manufactures and exports various kinds of construction and mining machinery including; pulley tackles, hoists other than skip hoists, winches, capstans, jacks, derricks, cranes, straddle carriers, works trucks fitted with a crane, forklift trucks, other work trucks fitted with lifting and handling equipment, lifting, handling, loading and unloading machinery, self propelled bulldozers, graders and excavators, moving, grading, scraping and boring machinery for earth, stone and mineral elements, spare parts of construction machinery, special purpose motor vehicles for persons and goods, work trucks and lifting equipment for factories and airports.

Turkish construction and mining machinery sector has produced lifting machinery, especially cranes, since 1970. Bridge and tower cranes, cranes designed for mounting on road vehicles and cranes used in the iron and steel sector have an important share in the production of cranes. Small and medium-sized companies dominate the crane industry.

Approximately, 50 companies are operational in the crane sector. Some of these companies have specialized in the production of certain models by means of mass production. For instance, the production of a special type of high capacity cranes is performed successfully by 10 big companies.

In Turkey, there are a few big companies producing small-capacity machines called forklifts, backhoe loaders, hammers and excavators. Backhoe loaders and excavators are among the fast developing products in the sector. At present, the share of backhoe loaders in the total sales of construction and mining machinery is about 40% while that of excavators is about 30%. This tendency for backhoe loaders and excavators is expected to continue.

Turkish construction and mining machinery industry is composed of about 500 companies, with medium and small-sized companies dominating the industry. About 100 of these are manufacturing companies 10 of which are large-sized companies. Manufacturing sites are mainly located in the Marmara, Central Anatolian and Aegean Regions of Turkey. Istanbul, Konya and Ankara are the major cities in construction and mining machinery and spare parts production. BMC, Temsa, Hema and Hidromek are among the important companies that are included in the list of 500 largest companies in Turkey, prepared by Istanbul Chamber of Industry in 2011. Çukurova İnşaat Makinaları, Parsan Makine Parçaları and Sanko Makina are other important companies in the industry.

EXPORTS

One of the most promising subsectors of the Turkish machinery industry in exports is construction and mining machinery. Turkish construction and mining machinery producers compete with world-wide well-known producers in domestic as well as foreign markets.

Total exports of the sector reached US \$1,5 billion in 2011 with an increase of 41% compared to the previous year. Main exports products are; machinery spare parts, machinery for sorting, screening, separating, washing, crushing, grinding, mixing or kneading earth, stone, ores or other mineral substances, lifting, handling, loading and unloading machinery, special purpose motor vehicles for persons and goods, self propelled bulldozers, graders and excavators, moving, grading, scraping and boring machinery for earth, stone and mineral elements, derricks and cranes. Among the product groups; construction and mining machinery spare parts and machinery for sorting, screening, separating, washing, crushing, grinding, mixing or kneading earth, stone, ores or other mineral substances are the most traded items. Total share of these groups in the total exports of construction and mining machinery is about 69,2%. Other important export products, namely lifting, handling, loading and unloading machinery, account for 7,8% of the total exports in the sector.

Turkish-made construction and mining machinery were exported to over 150 countries in the world in 2011. Major export markets were Germany, Romania, Iraq, England and Iran.

Turkey's Exports of Construction and Mining Machinery (Value: million US \$)

HS	Products	2008	2009	2010	2011	Share Of Major Export Markets In 2011 (%)
8425	Pulley tackles, hoists other than skip hoists, winches	22,2	23,5	21,4	23,5	China (17), Romania (12) Iran (9), Germany (5) Azerbaijan (5)
8426	Derricks, cranes	44,7	53,4	47,6	47,4	Iraq (11), Saudi Arabia (8) Russia (6) Turkmenistan (6) Azerbaijan (6)
8427	Forklift trucks	10,7	8,1	9,0	13,2	Algeria (25), Azerbaijan (14) Iraq (8), Russia (4), Poland (4)
8428	Lifting, handling, loading and unloading machinery	91,5	77,0	73,9	118,2	Russia (17), Iran (8) Iraq (6), Algeria (6), U.S.A. (6)
8429	Self-propelled bulldozers, angle dozers, graders and excavators	111,2	73,5	75,9	102,0	Algeria (27), (Azerbaijan (9) Iran (9), Georgia (7), Turkmenistan (5)
8430	Moving, grading, scraping and boring machinery for earth, stone and mineral elements	27,9	18,1	29,5	49,8	Romania (42), Azerbaijan (7), Germany (4), Iran (4) Syria (4)
8431	Spare parts	507,0	288,2	453,7	696,9	England (13), Germany (11) Romania (9), Italy (8) Free Zones (7)
8474	Machinery for sorting, screening, separating, washing, crushing, grinding, mixing or kneading earth, stone, ores or other mineral substances	341,6	248,4	255,7	346,5	Tunisia (16), Russia (10) Iraq (8), Iran (8), Algeria (7)
8705	Special purpose motor vehicles for persons and goods	173,4	136,1	95,6	107,6	Iraq (23), Azerbaijan (14) Syria (9), Romania (7) Iran (6)
8709	Work trucks and lifting equipment for factories, airports	1,4	1,3	1,5	1,3	France (27), Equatorial Guinea (19), T.R.N.C. (17) Azerbaijan (7), Kyrgyzstan (5)
	Total	1331,7	927,5	1063,8	1506,4	Germany (7), Romania (7) Iraq (7), England (6) Iran (6)

Source: Ministry of Economy

Turkish construction and mining machinery manufacturers and exporters follow European and international standards and norms. The obligation to affix the “CE Mark” was imposed on the Turkish market in 2002.

TRADE FAIRS

Detailed information about trade fairs organized in the construction and mining machinery sector is given at “<http://www.fuarrehberi.org.tr>” which is the official website of the Union of Chambers and Commodity Exchanges of Turkey (TOBB).

USEFUL ADDRESSES

- Central Anatolian Exporter Unions
www.oaib.org.tr
 - Machinery and Accessories Exporter Unions
www.makinebirlik.com
 - Turkish Machinery Promotion Group
www.makinetanitimgrubu.com.tr
 - Turkish Quality of Machinery
www.turqum.com
- Istanbul Minerals and Metals Exporters’ Associations
www.immib.org.tr
- Construction Equipment Distributors and Manufacturers Union
www.inder.org.tr



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Prepared by

General Directorate of Exports

Address: İnönü Bulvarı No:36
06510 Emek
Ankara - Turkey

www.economy.gov.tr

Turkey Contact Point



+90 312 444 43 63