



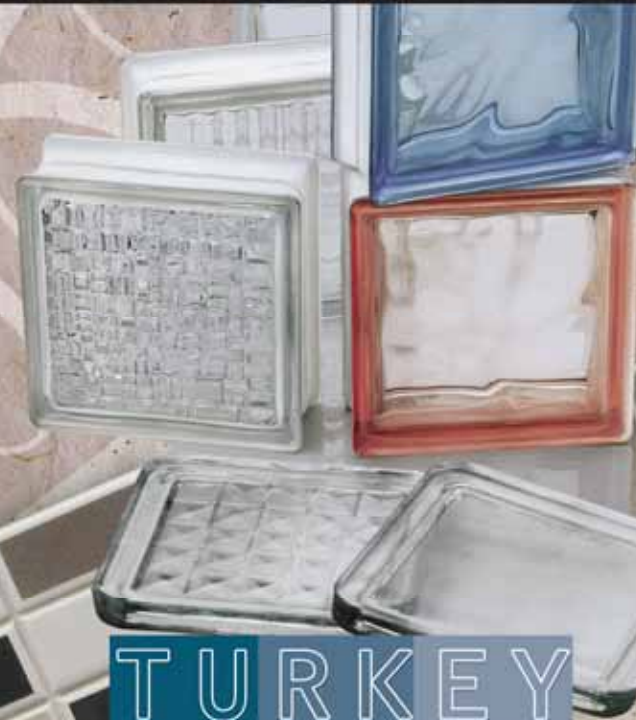
REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



BUILDING GLASS AND CERAMICS



TURKEY

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BUILDING GLASS AND CERAMIC INDUSTRY

BUILDING CERAMIC INDUSTRY

Production

The history of Turkish ceramics can be traced back several thousand years. The first notable ceramics from Turkish land were the tiles and bricks covered with coloured glazes made in Anatolia for architectural purposes in the 13th century.

The Turkish classic ceramic art of “Çini” is famous throughout the world. Early Turkish tribes who lived in Central Asia made the first examples of this ceramic art for their kitchen and household use. Later, with the Seljuk movement this art came to Anatolia and became a decorative art piece which was mostly used in the decoration of mosques, public libraries and Turkish baths.

The first commercial production of ceramics started in 1965 with the foundation of the first plant. At present, there are more than 60 establishments in ceramic production.

Turkey is rich in ceramic raw materials such as feldspar, clay, kaolin and quartz, and Turkish ceramic raw material reserves are large enough to satisfy the demand. Most Turkish firms have installed their own raw material preparation facilities within their facilities.

Ceramic industry is one of the fastest growing sectors of building materials industry in Turkey. Production of ceramic tiles and sanitaryware ~~can~~ meets the domestic demand and provides a significant export capacity.

Currently, 23 firms are actively carrying out production in the ceramic tiles sector. Eczacıbaşı (VitrA), Kale, Töprük, and Ege Seramik Groups, which are the leaders in the sector, are among the largest manufacturers in the world.

Today, about 40 manufacturer firms are operational in the Turkish sanitaryware sector. Eczacıbaşı (VitrA), Kale Seramik and Serel Seramik, which are among the leading firms of the sector, are also among the largest producers as well.

There are also significant acquisitions among the ceramic manufacturers. Engers Keramik, a well-established player in the German tile market with a history dating back to 1911, joined Eczacıbaşı's Building Products Division in 2006. Engers produces 2,300,000 m² of highly fashionable wall tiles. In 2007, Eczacıbaşı's Building Products Division acquired a 51% share of V&B Fliesen, the tile division of Villeroy&Boch, one of the world's oldest and best-known ceramic brands. V&B Fliesen produces 10,000,000 m² of ceramic and porcelain floor tiles annually at its two tile plants in Germany (Merzig and Mettlach) and the plant in France (La Ferté-Gaucher). One of the main Turkish ceramic products manufacturers, Kale Group, carried out the first foreign acquisition in Italy in 2011. Kale has bought the whole Edilcuoghi company, which is engaged in the production of ceramic tiles in the Sassuolo ceramic industry center that is located in Emilia-Romagna region of Italy.

Building Glass and Ceramics Companies in Top 500 Companies in Turkey

	Company Name	Location
1	Trakya Cam San. A.S.	İstanbul
2	Paşabahçe Cam San. Ve Tic. A.Ş.	İstanbul
3	Kaleseramik Çanakkale Kalebodur Seramik Sanayi A.Ş.	İstanbul
4	Eczacıbaşı Yapı Gereçleri San. Ve Tic. A.Ş.	İstanbul
5	Anadolu Cam Sanayi A.Ş.	İstanbul
6	Vitra Karo San. Ve Tic. A.Ş.	İstanbul
7	Anadolu Cam Yenişehir Sanayi A.Ş.	İstanbul
8	Paşabahçe Eskişehir Cam San. ve Tic. A.Ş.	İstanbul
9	İzocam Tic. ve San. A.Ş.	İstanbul
10	Camiş Ambalaj San. A.Ş.	İstanbul
11	Ege Seramik San. ve Tic. A.Ş.	İzmir
12	Cam Elyaf Sanayi A.Ş.	İstanbul

Source: Istanbul Chamber of Industry

Turkish wall and floor tiles and sanitaryware have exquisite designs and superior quality. In the sector, designers prepare high prestige products and collections in line with the trends and customer demand in a specific year. Turkish designers use Anatolian influences as well as world trends in their ceramic patterns and designs. Most of the large-scale companies have ISO 9000 Standards, CE mark and the other valid standards in major markets.

Exports

Parallel to the positive developments in production, the Turkish ceramic industry also shows an outstanding performance in exports. In recent years, Turkish ceramics industry exports have shown an upward trend. While in 2010, exports of the building ceramics industry were valued at US\$787 million, in 2011 exports increased to US\$883 million.

Building Ceramics Exports (Value: US\$ 1000)

HS Codes	Products	2009	2010	2011	Share of countries (%) in 2011
6907,6908	Ceramic wall and floor tiles	390,801	467,770	521,108	Germany(13,4), Israel(10,7), United Kingdom(8,7), Iraq(7,4)
6910	Ceramic sanitaryware	139,037	156,859	178,557	Germany(13,8), Italy(10,9), France(10,8), United Kingdom(9,9)
Total		529,838	624,629	699,665	Germany(13,53), United Kingdom(9,06), Israel(8,8), Iraq(6,9), France(6,6)

Source: Ministry of Economy

In 2011, ceramic wall and floor tiles had the largest share of exports among building ceramic products with a value of US\$521 million. Ceramic sanitaryware ranked second with an export value of US\$178 million.

In 2011 Turkish building ceramic products were exported to 158 countries in the world. The European Union has a share of 49.9% in the building ceramics exports of Turkey. In the same year, major markets for building ceramic products are Germany, the United Kingdom, Israel, Iraq and France.

BUILDING GLASS INDUSTRY

Production

Glass industry is one of the major industries which contribute to the construction industry in Turkey. Historically, glass production dates back to the Seljuk Period. Furthermore, substantial improvements were achieved in the 17th and 18th Centuries during the Ottoman Empire.

At present “Türkiye Şişe ve Cam Fab. A.Ş. (Şişecam Group)” is a group of companies in the sector which accounts for approximately 90% of the annual production. The company also has various packaging, chemical raw material and financial companies besides its glass producing companies. Şişecam ranks second in Europe, third in the world in the glass houseware field, fourth in Europe in the field of flat glass and glass packaging.

There are about 20 small and medium scale firms that produces glass in the sector other than Türkiye Şişe ve Cam Fab. A.Ş. Turkish glass industry utilizes a highly sophisticated production technology and a vast accumulation of know-how. Turkish glass industry had a total capacity of 125.303 tons/year in 2010.

Exports

In 2011 building glass products were exported to 132 countries in the world. The European Union has a share of 53.87% in the building glass exports of Turkey. In the same year, major markets for Turkish building glass products are Germany (12.6%), Italy (8%), France (5.7%) and Bulgaria (4.7%),

Exports of Building Glass and Ceramic Products (Value: US\$ 1,000)

HS Codes	Products	2009	2010	2011	Share of countries (%) in 2011
7005	Flat Glass	39.964	63.379	59.042	Iraq (12), Russian Fed.(10), Israel (9,5), Bulgaria(9,4)
7007	Safety Glass	116.607	127.409	179.953	Germany (18,3), Italy (8,8), the UK (8,2), France (7,3)
7008	Insulation Glass	40.100	38.249	48.767	Azerbaijan (14,7), Turkmenistan (12,3), Kazakhstan (10,6), Bulgaria (5,4)
7016	Glass Blocks and Mosaics	9.621	10.549	10.253	Iraq (25,5), Italy (16,8), Azerbaijan (6,3), Georgia (5,9)
7019	Glass Wool	76.707	92.730	100.384	Germany (15,6), Italy (12,2), France (7,8), Israel (4)
Total		283.002	332.319	398.401	Germany (12,6), Italy (8), France (5,7), Bulgaria (4,7)

Source: Ministry of Economy

TRADE FAIRS

Turkish building glass and ceramic products are exhibited in international and local fairs organised in Turkey. In 2012, the following fairs will be organised in Turkey:

- **“ISTANBUL WINDOW”** (Window, Glass Technology, Accessories and Side Industries Fair) in Istanbul in March,
- **“EURASIA FLOOR”** (Carpets, Parquets, Ceramics, All Floor Coverings Fair) in Istanbul in April,
- **“UNICERA”** (Ceramic and Bathroom Fair) in Istanbul in March,
- **“INTERNATIONAL TURKEYBUILD ISTANBUL FAIR”** (International Building Construction Materials and Technologies Fair) in May in Istanbul,
- **“YAPEX CERAMICS & BATH”** (Ceramics, Vitrified Products, Bathroom Armatures and Accessories Fair) in Antalya in October,
- **“YAPEX WINDOOR FAIR”** (Window-Door Systems, Accessories and Equipments Fair) in Antalya in October,
- **“INTERNATIONAL TURKEYBUILD IZMIR FAIR”** (International Building Construction Materials and Technologies Fair) in October in Izmir.

USEFUL LINKS

- Turkish Ceramics Federation
www.serfed.com
- Eskisehir, Bilecik, Kutahya Ceramics Cluster Association
www.ebkseramikumesi.org
- Cement, Glass and Ceramics Exporters' Union
www.cimentobirlik.org



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