

# TURKISH ALUMINIUM INDUSTRY

## *A Brief Overview*

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**POPULATION** : 82 Million (2018)  
**GDP** : USD 10.537 (2017)  
**Exports** : USD 168 billion  
**Imports** : USD 223 billion  
**F.D.I** : USD 10,9 billion  
**# of Foreign Capital Companies:** 58.418

**Major Exports:**

Germany (9.6%), UK(6.1%), Iraq (5.8%) USA (5.5%), Italy (5.4%)

**Major Imports:**

China (10%), Germany (9.1%), Russia (8.3%) USA (5.1%), Italy (4.8%), France (3.5%)

# TALSAD Members

- Established in 1971, one of the oldest industry organizations in Turkey.
- 76 Members / leading companies of the Turkish aluminium industry



ONURSAL ÜYELERİMİZ: ASİM KİBAR • CELAL BAŞER



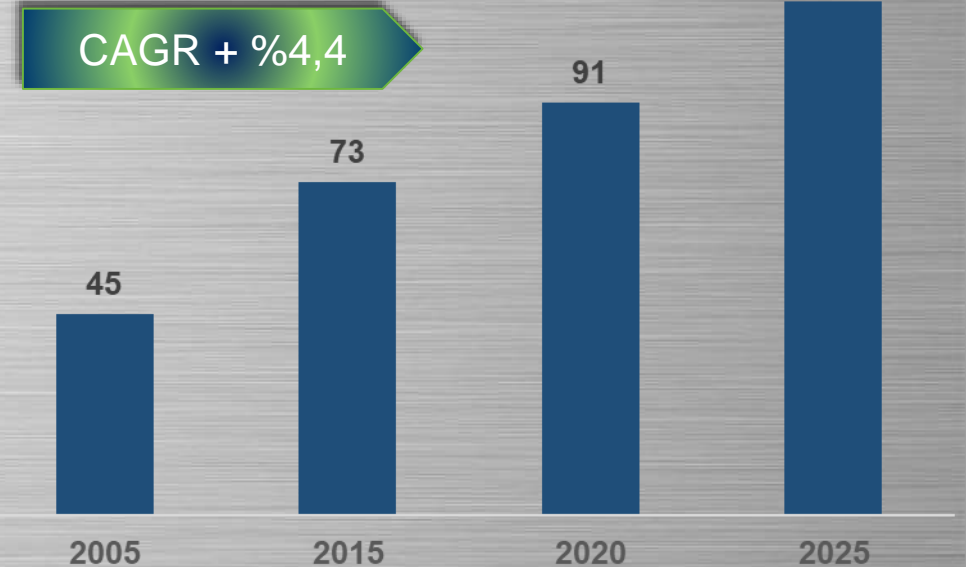
# Aluminium consumption in Turkey has grown by around 8% in the last decade

Aluminium Consumption of Turkey (ton)



Source: TALSAD, Turkey

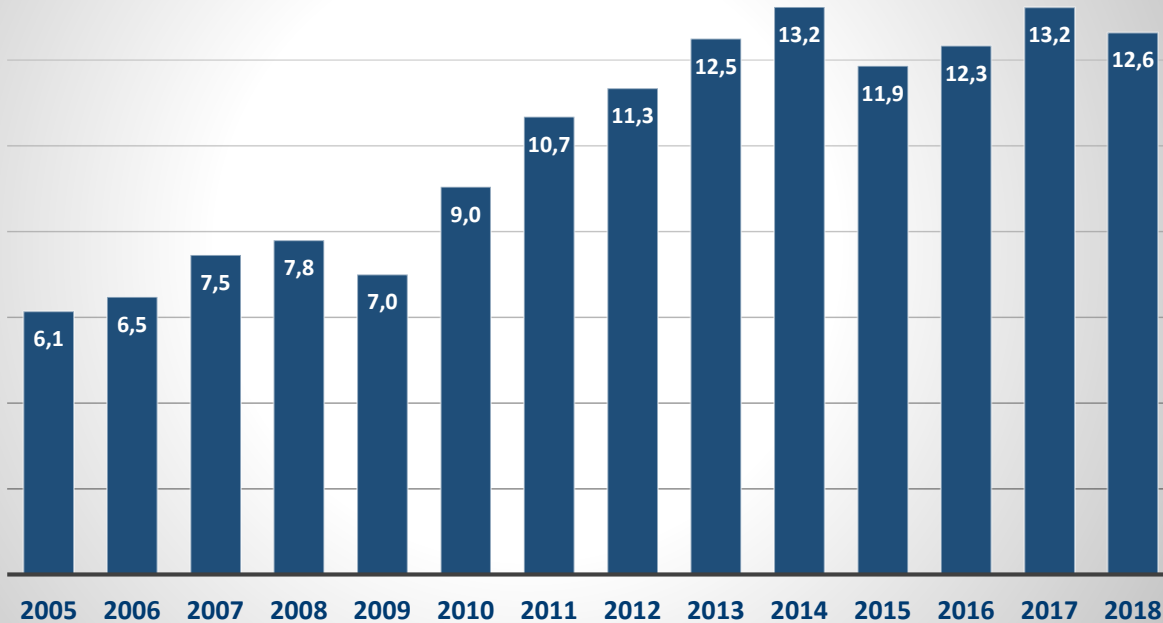
World aluminium consumption (Mt)



Source: MBR The Global Aluminium Industry Outlook to 2025

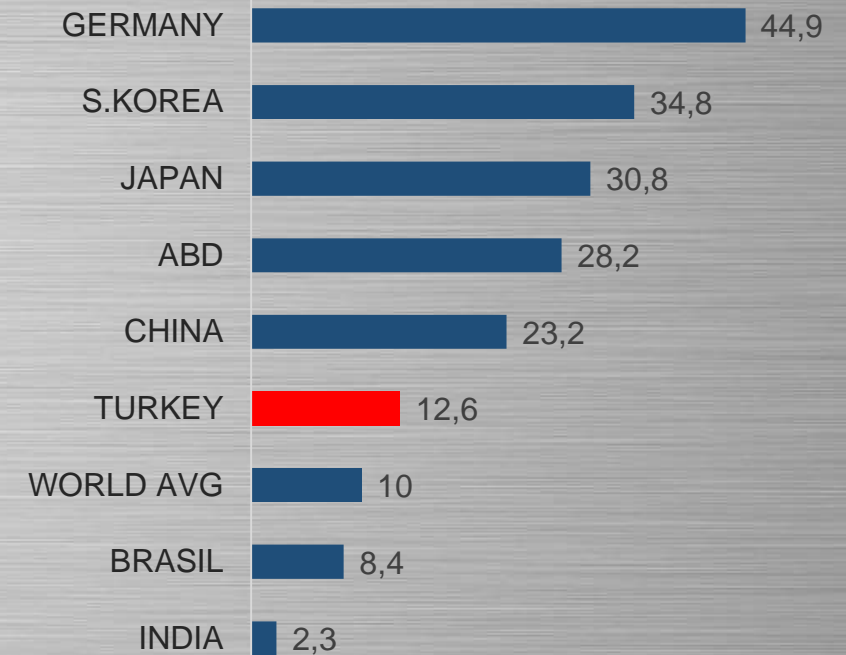
# Aluminium per capita consumption is around 12,5 kg, slightly above the world average

**Aluminum Consumption**  
kg/capita kg/year



Source: TALSAD, Turkey

**Aluminium Consumption**  
per capita kg/year



Source: MBR The Global Aluminium Industry Outlook to 2025

# Turkish aluminium industry is widespread in the whole value chain.

## 1 smelter



## 19 wrought aluminium producers



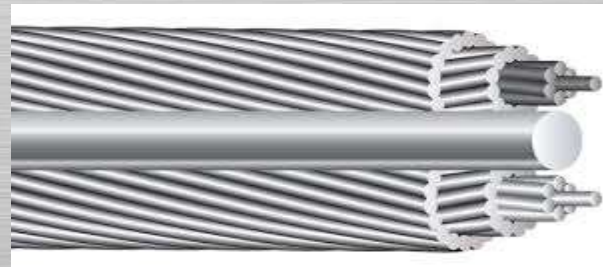
## 21 rollers, plate manufacturers



## 74 extruders



## 18 wire and cable manufacturers



## 10 packaging manufacturers



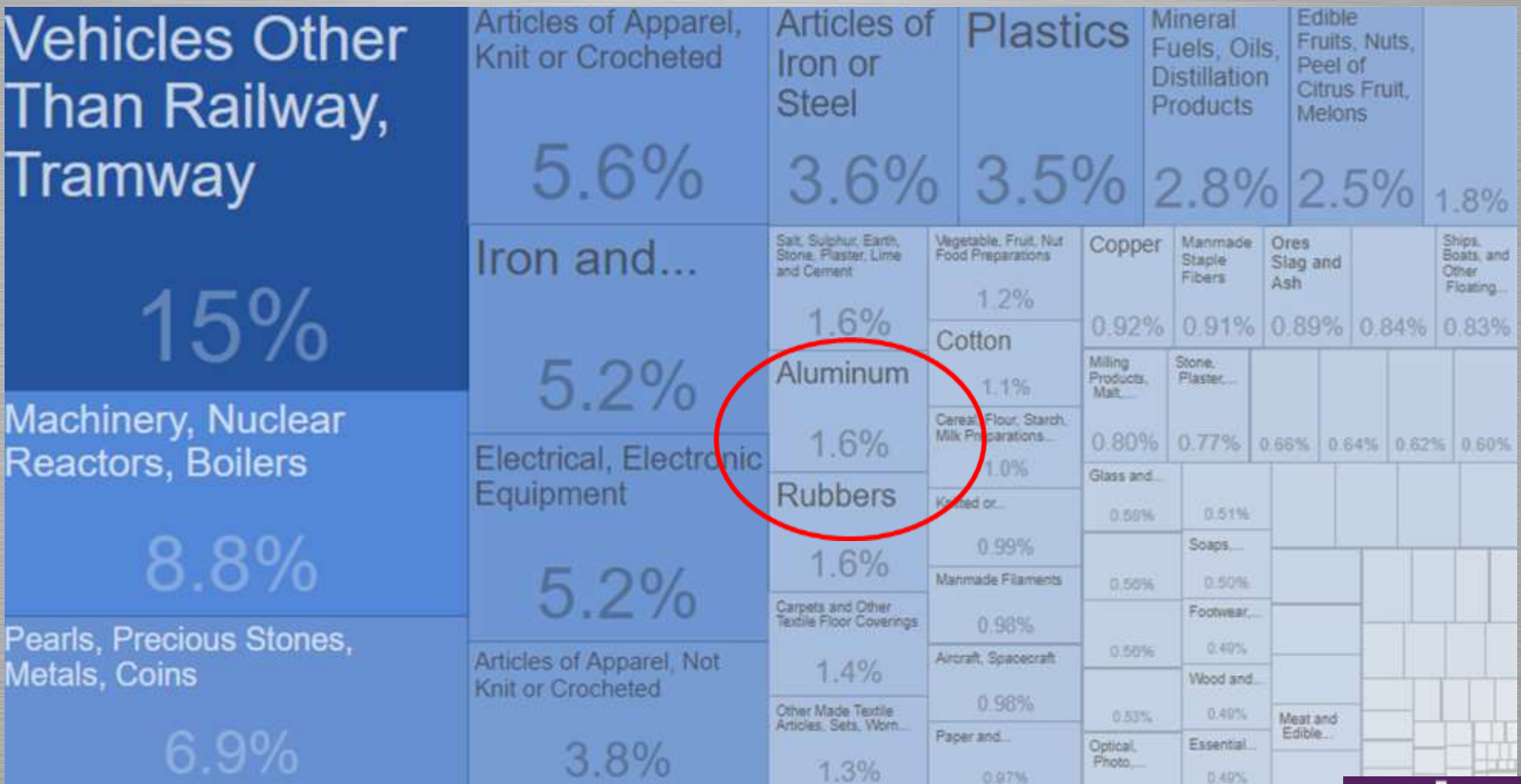


# Turkey Imports By Category-

Aluminium Imports represents 1.5% of total imports by category,  
USD 3.9 Billion (2018)



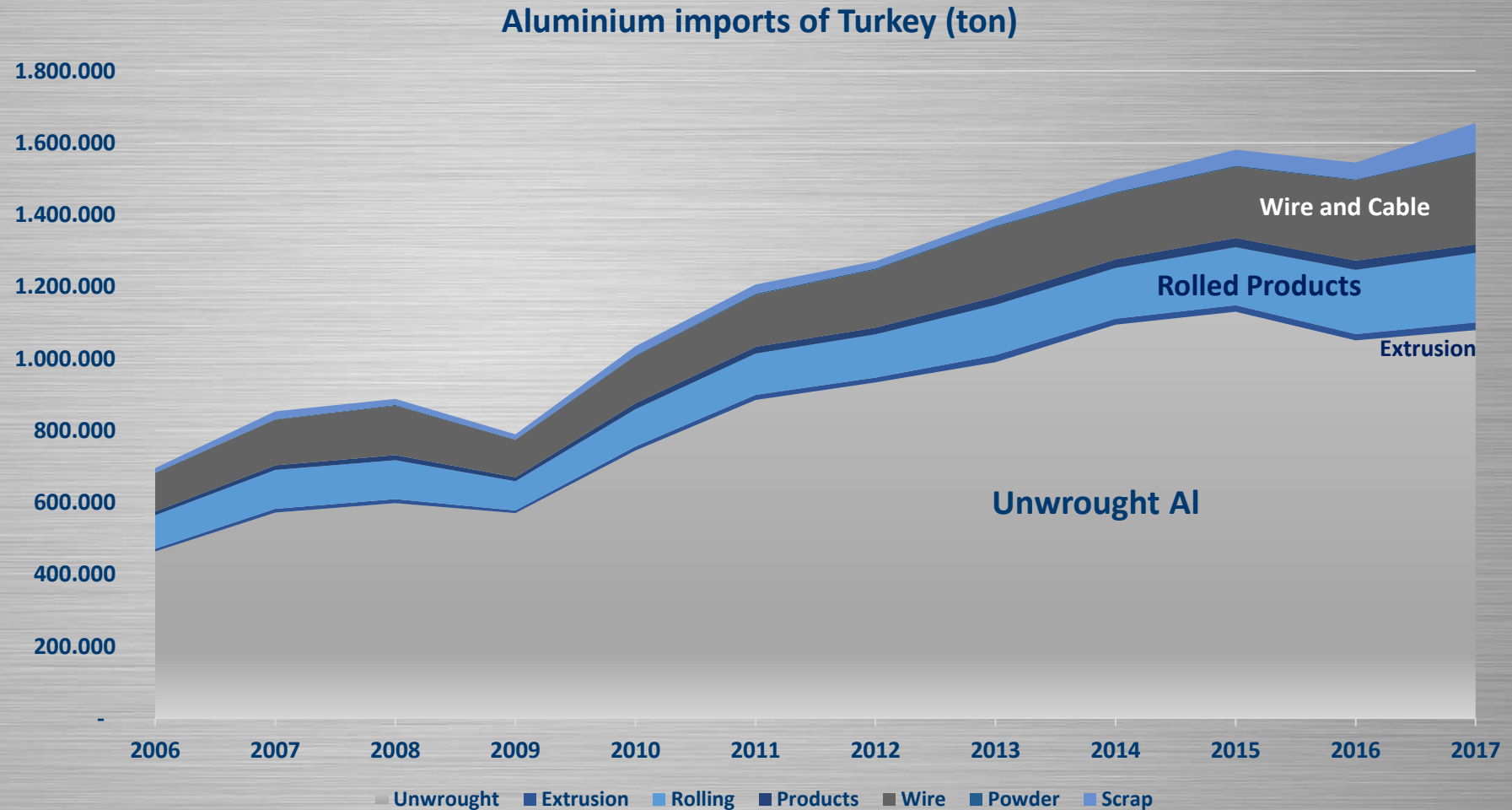
Turkey Exports By Category-  
 Aluminium Exports represents 1.6% of total exports by category,  
 USD 3.0 Billion (2018)



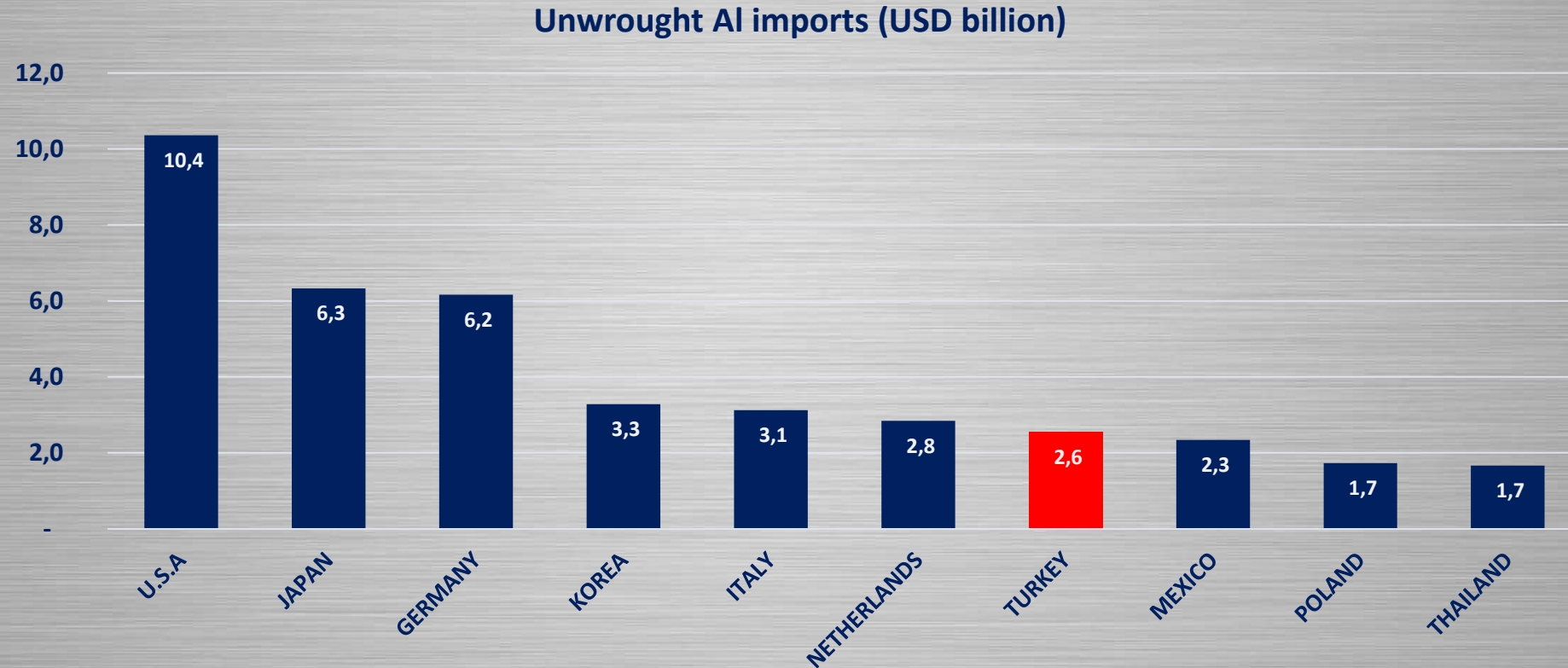


# Aluminium industry of Turkey is based on value adding manufacturing processes

- Turkey imports 1.6 million tons of aluminium products, 1.1 million tons of which is unwrought aluminium.

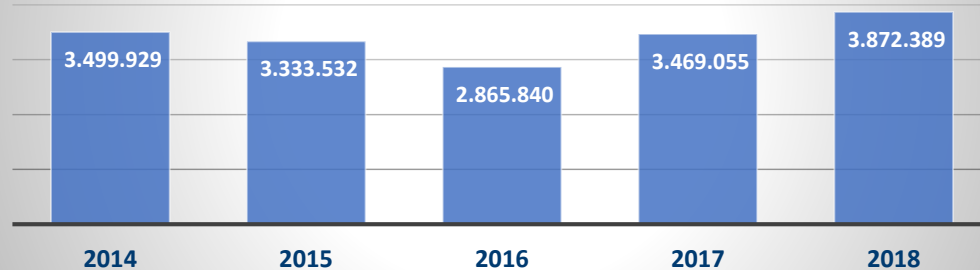


# Turkey ranks 7<sup>th</sup> among unwrought Al importing countries



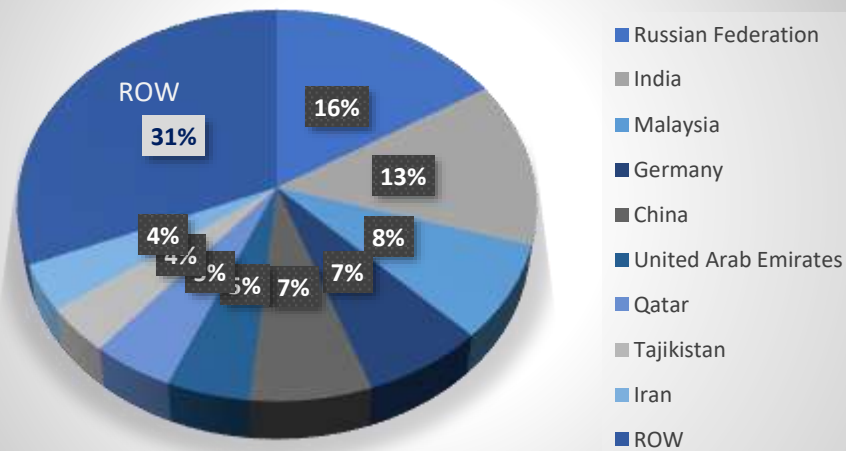
# Turkey's aluminium imports reached to USD 3.9 billion

Aluminium Imports of Turkey (\$)

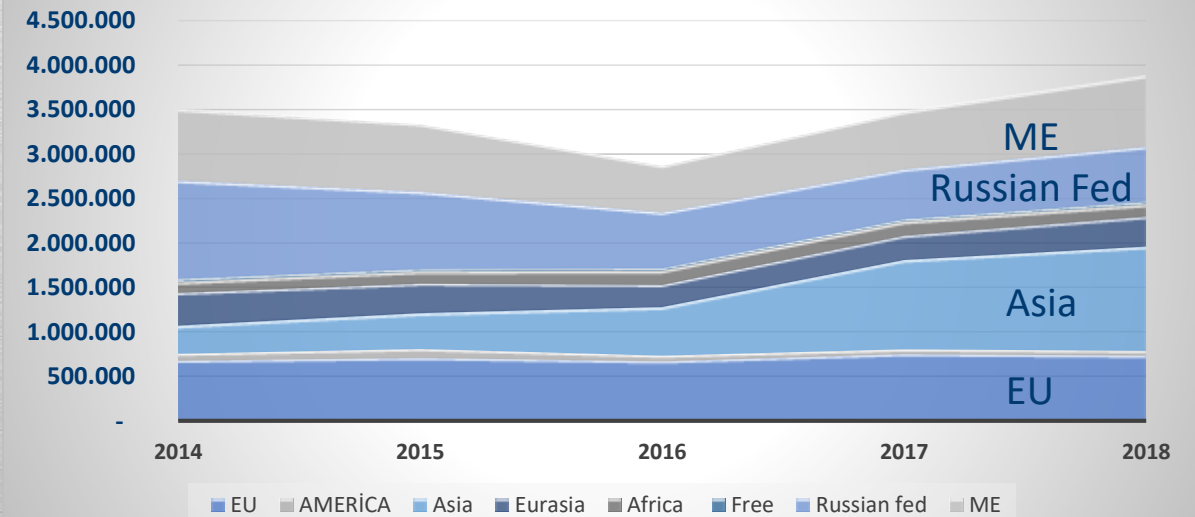


Turkey ranks 7<sup>th</sup> in primary (16<sup>th</sup> in total) aluminium importing countries

Supply source of Aluminium for Turkey

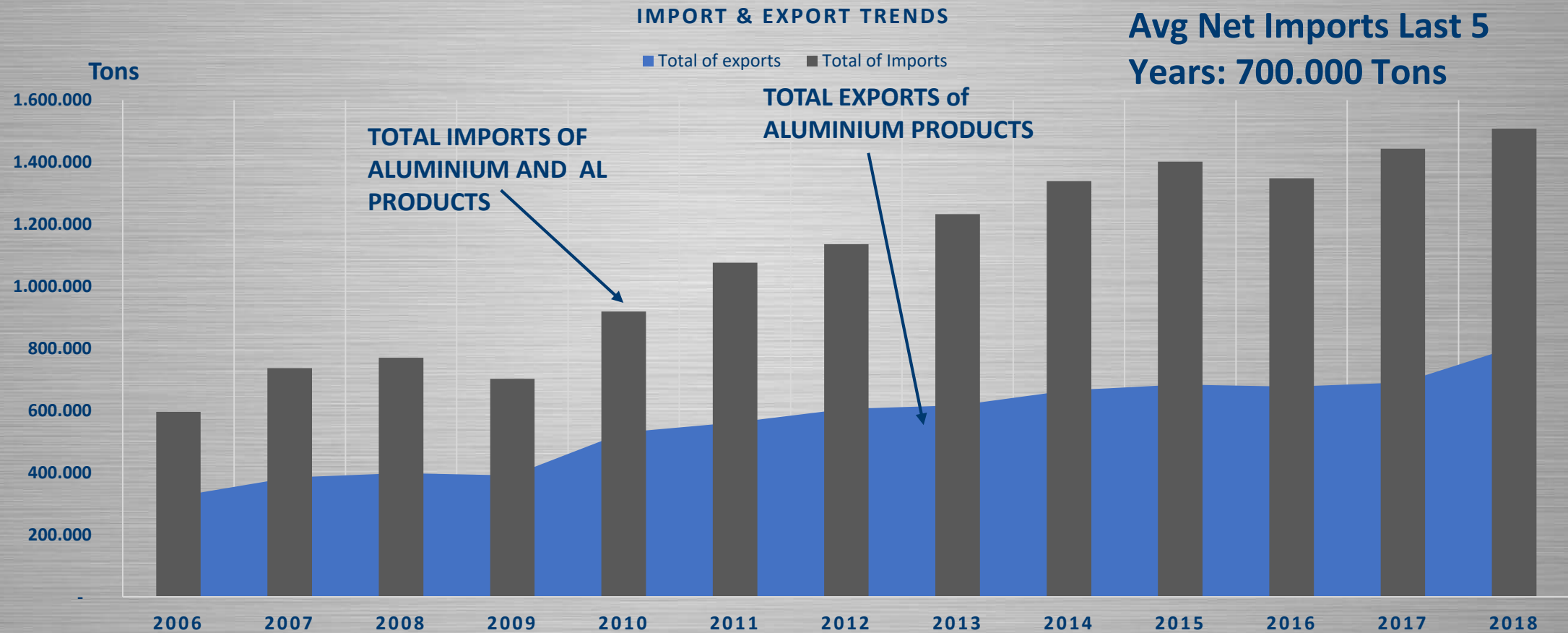


Supply Sources, (USD)

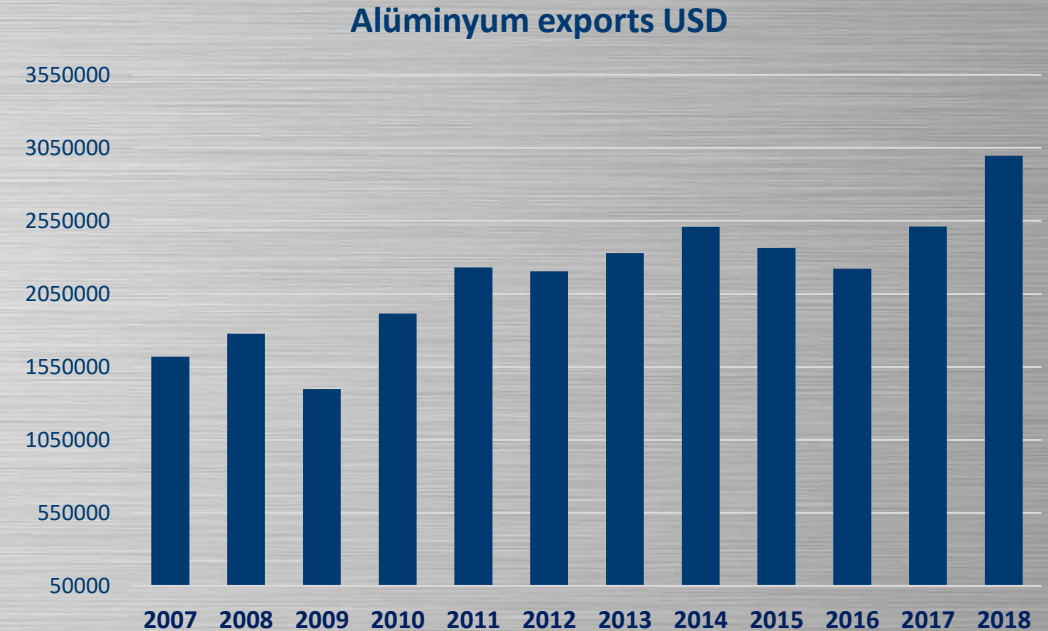
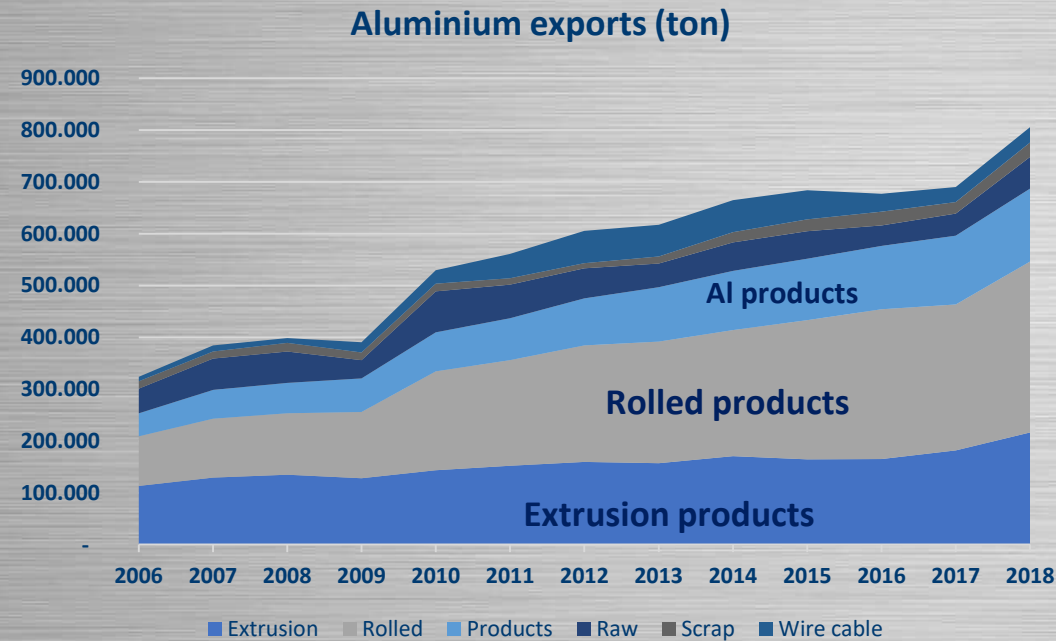




# Turkey is a net importer of Aluminium and products



# Turkey's export of aluminium products doubled in last 10 years. (2018 total exports 805.000 tons)

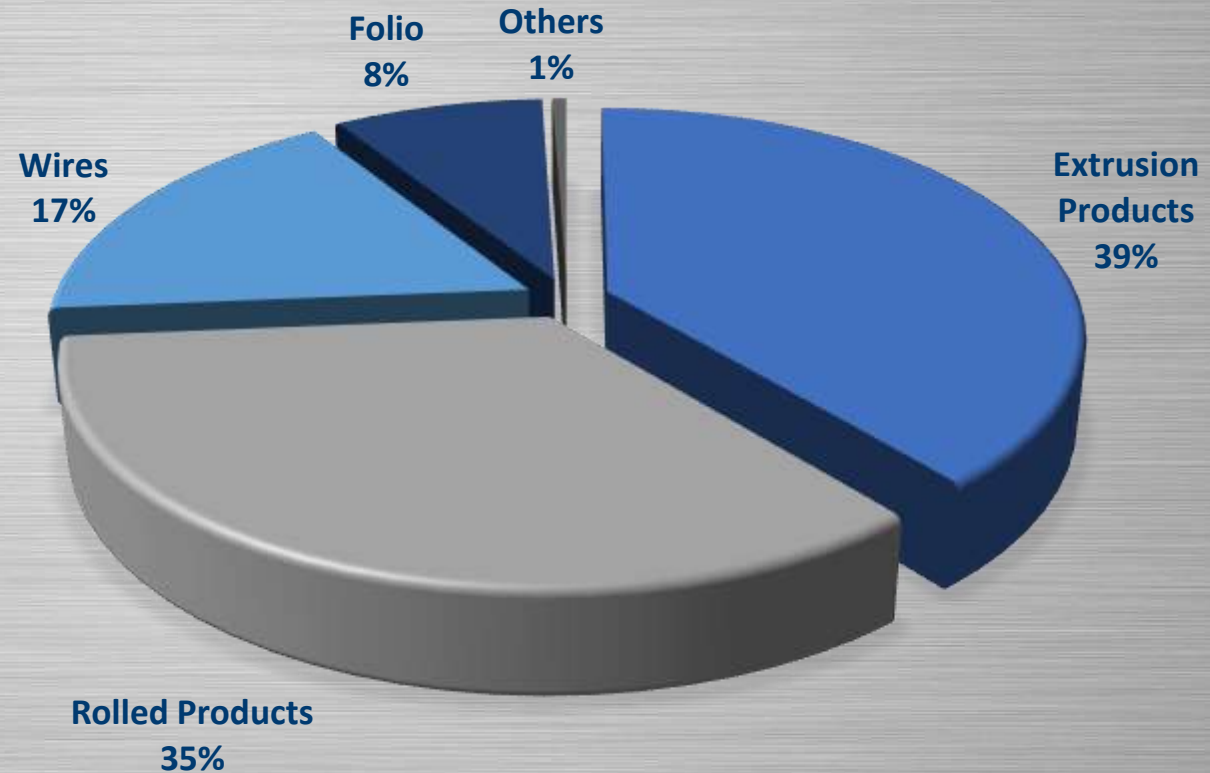


Aluminium industry of Turkey is based on value adding manufacturing processes

# Share of Semi Products Consumption in Turkey



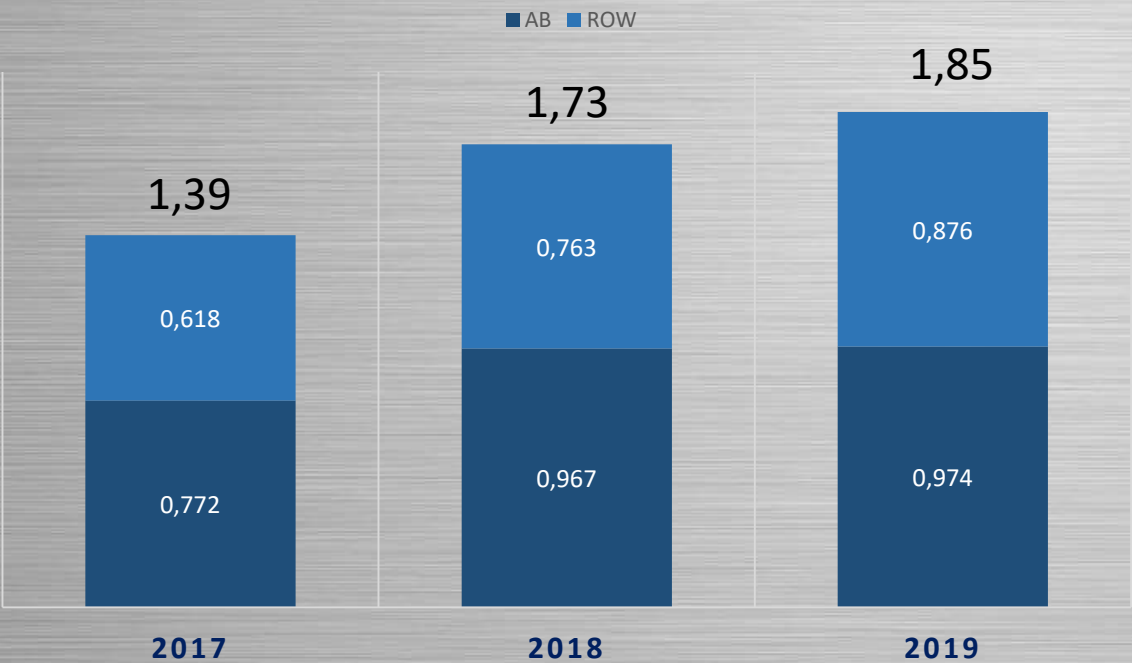
CONSUMPTION OF SEMIS IN TURKEY



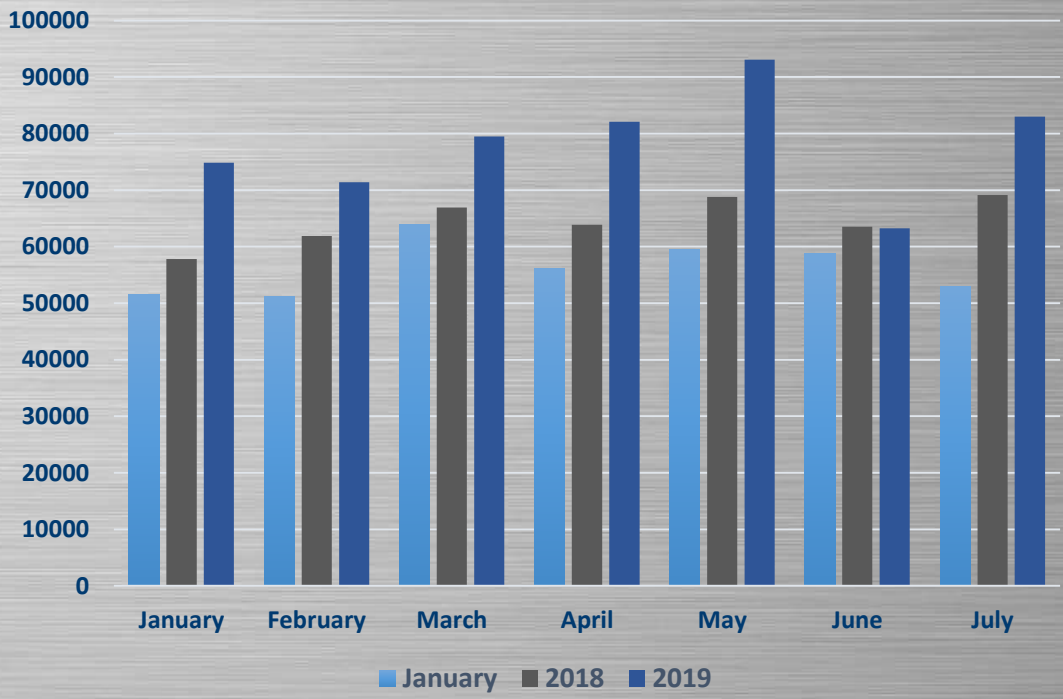


# Aluminium product exports continue to increase in 2019

ALUMINIUM PRODUCTS EXPORTS  
(JANUARY - JULY BILLION \$)

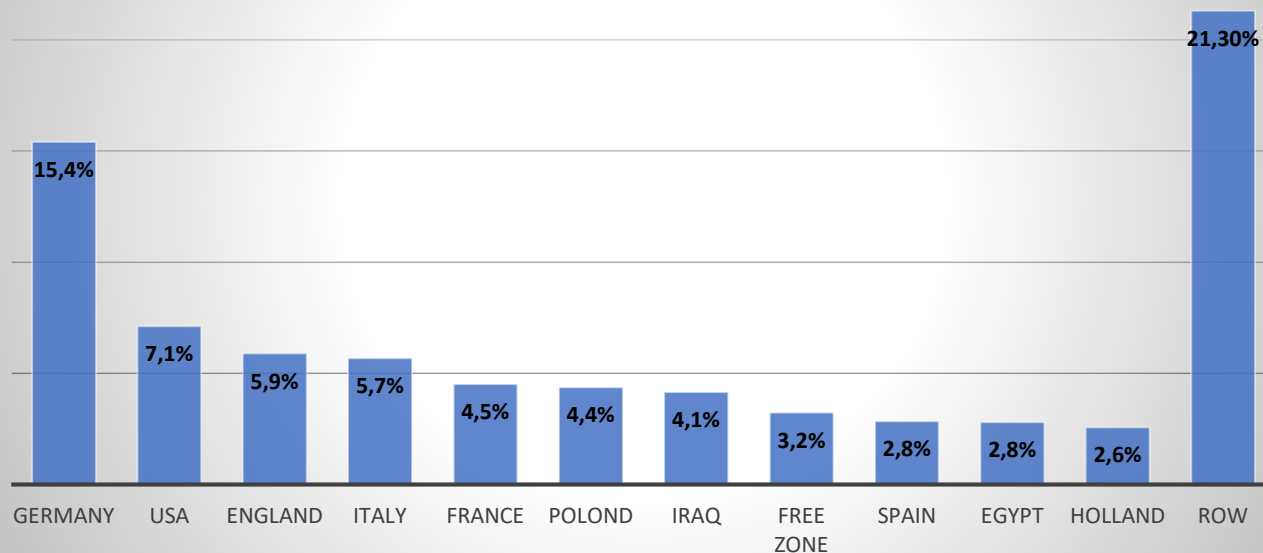


Aluminium exports (tons/month)

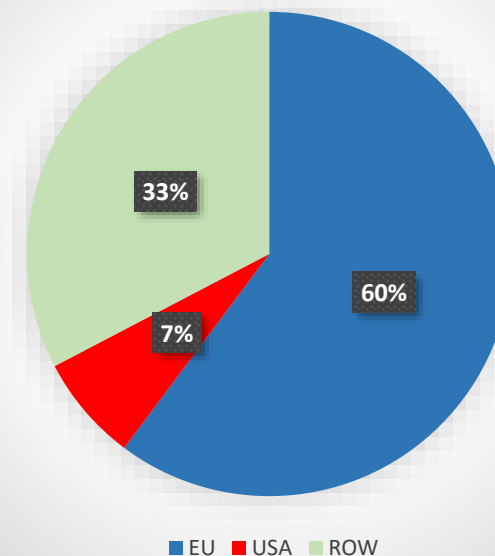


# EU ve USA constitute 2/3 of Turkey's aluminium exports

Aluminium trade



Share of regions by export (2018, %)

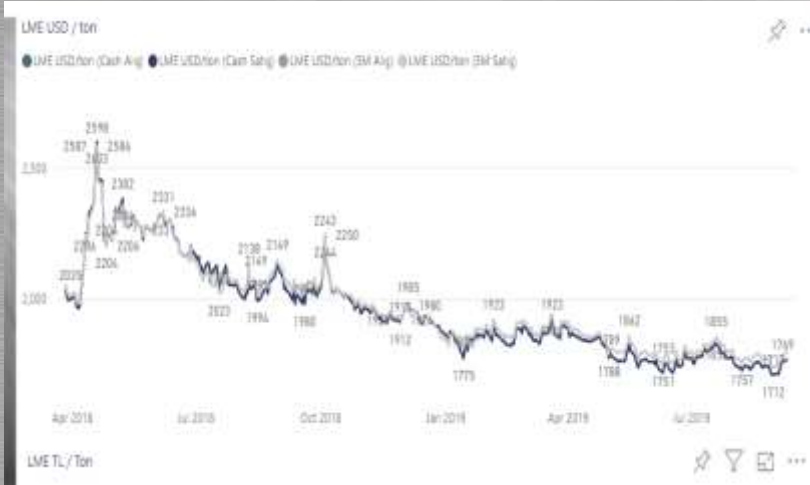


TURKISH ALUMINIUM INDUSTRIALISTS ASSOCIATION

- 
- Dünya Haritası
- Canada
- KUZEY AMERİKA
- ABD
- ABD Küçük Out.Adı.
- Fas
- Küba
- Anguilla
- Meksika
- Kosta Rika
- Dominik Cumhuriyeti
- Kolombiya
- Panamá
- Peru
- Surinam
- Botivya
- Brezilya
- Paraguay
- Uruguay
- Sili
- Arjantin
- Atlantik Olyanusu
- İzlanda
- İsveç
- Finlandiya
- Norveç
- Almanya
- Danimarka
- Hollanda
- Çekya
- İtalya
- Polonya
- Letonya
- Kazakistan
- Rusya Federasyonu
- Moğolistan
- Çin
- Japonya
- Güney Kore
- BAE
- Kamboçya
- Filipinler
- Singapur
- Malezya
- Avustralya
- Okyanusya
- Portekiz
- Birleşik Krallık
- İsviçre
- Azerbaycan
- Kırgızistan
- Gürcistan
- Özbekistan
- İrak
- Kuzey Kıbrıs Türk Cum.
- Bulgaristan
- İspanya
- Mısır
- İsrail
- İran
- Pakistan
- Hindistan
- Sri Lanka
- Maldivler
- Mauritius
- Madagaskar
- Namibya
- Güney Afrika Cumhuriyeti
- Tanzanya
- Kenya
- Etiyopya
- Kamerun
- Somali
- Seyşeller
- Libya
- Cezayir
- Mali
- Moritanya
- Nijer
- Nijerya
- Gine
- Senegal
- Gambiya
- Yeni Zelanda

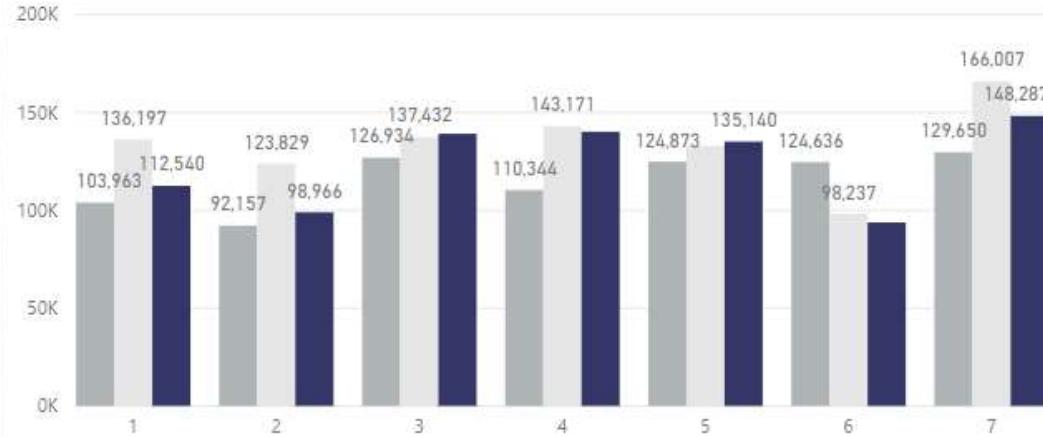


# TALSAD DIGITAL PLATFORM

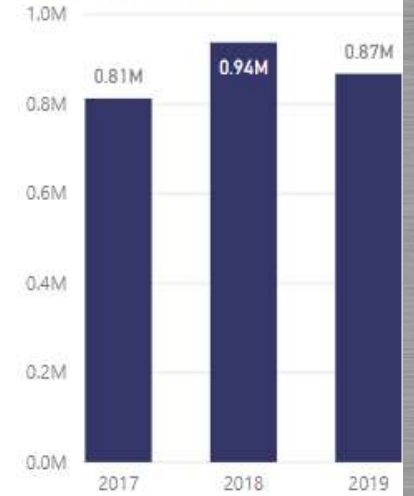


Türkiye Alüminyum İhracatı Miktar (ton)

YIL ● 2017 ● 2018 ● 2019



İthalat Miktarı (Ton) by YIL



- ONLINE ALUMINIUM INDUSTRY DATA. MOBILE AND WEB BASED APPLICATIONS
- LME PRICE UPDATES
- TURKISH ALUMINIUM INDUSTRY TRADE DATA, TRADE MAP AND TRENDS – MONTHLY UPDATES
- TALSAD INDUSTRY DATA- YEARLY UPDATES

# CONCLUSIONS

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- Turkish Aluminium market is characterized by high import dependency, mainly on primary aluminium, and widespread manufacturing base to serve whole world
  - Turkish aluminium industry is the “**manufacturing base**” of the region.
- Local aluminium consumption has shown significant and stable growth since 2005. Automotive and construction industries are the main drivers of the aluminium growth in the Turkish market.
- The effect of economic slow down in 2018 yield a decrease in local construction and automotive industries.
- The growth, both in local and export markets has picked up and likely to continue in 2019.

Thank you.

**TALSAD**  
TURKISH ALUMINIUM INDUSTRIALISTS ASSOCIATION

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