

50 YEARS

TURKISH ALUMINIUM INDUSTRY OVERVIEW

Decarbonization and Implementations in
the Construction Industry

Alum Forum 2021

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EUROPEAN ALUMINIUM

OUTLINE

TALSAD and TURKISH ALUMINIUM INDUSTRY

- *Industry statistics*
- *Trends and opportunities*

GREEN DEAL and NATIONAL ACTIONS IN TURKEY

- *Decarbonization and certification initiatives*
- *Specifics related with the construction industry*

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EUROPEAN ALUMINIUM

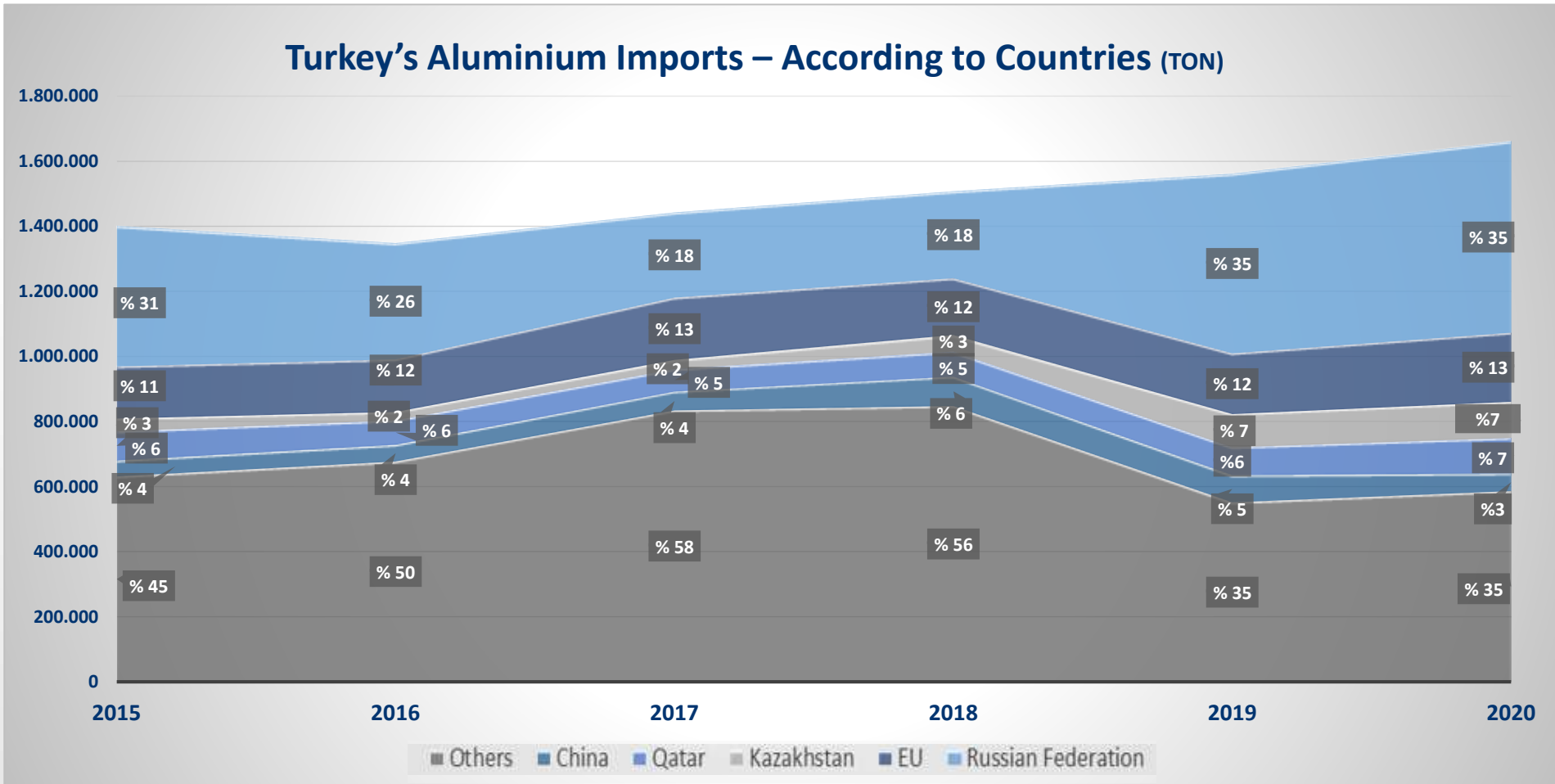
Overview of 2020 _Aluminium in Turkey

IMPORTS	2019	2020	%
Primary Imports	1.155.884	1.218.057	5,4%
Scrap Imports	138.528	179.590	29,6%
Semi's and Products	267.298	263.871	-1,3%
TOTAL	1.561.710	1.661.518	6,4%

EXPORTS	2019	2020	%
Primary Exports	105.709	46.785	-55,7%
Scrap Exports	20.292	17.517	-13,7%
Semi's and Product Exports	801.764	839.551	4,7%
TOTAL	927.765	903.853	-2,6%

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Turkey imports around 1.67 million tons of aluminium (unwrought and finished) main supplier is Russian Federation



Turkey's aluminum imports increased by 6.4% in 2020 compared to the previous year and amounted to 1.66 million tons. Turkey made the most aluminum import from Russia in 2020.



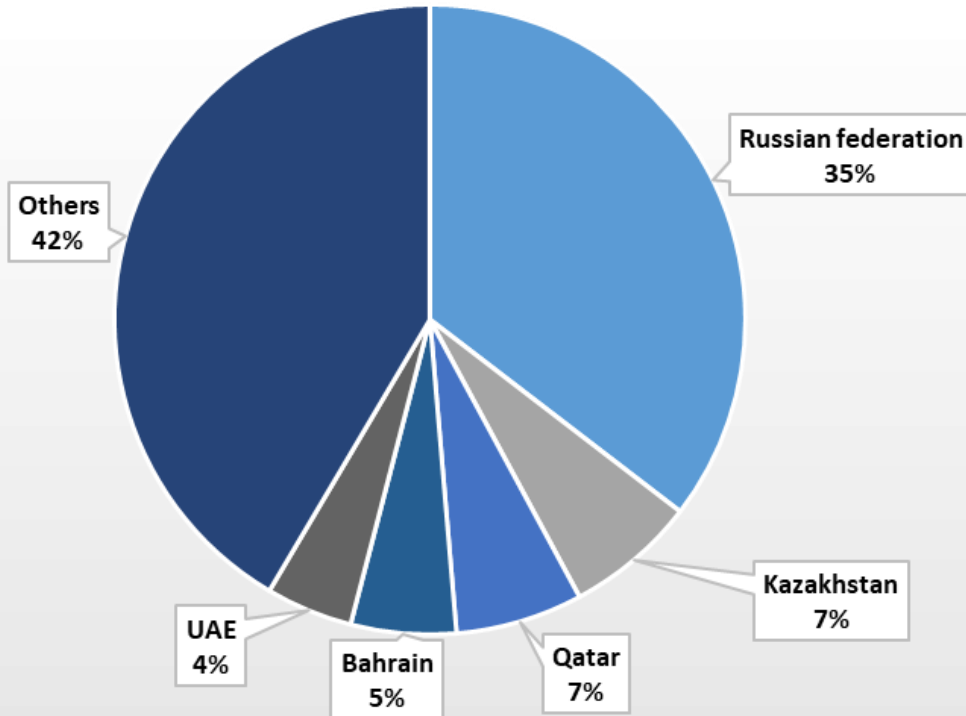
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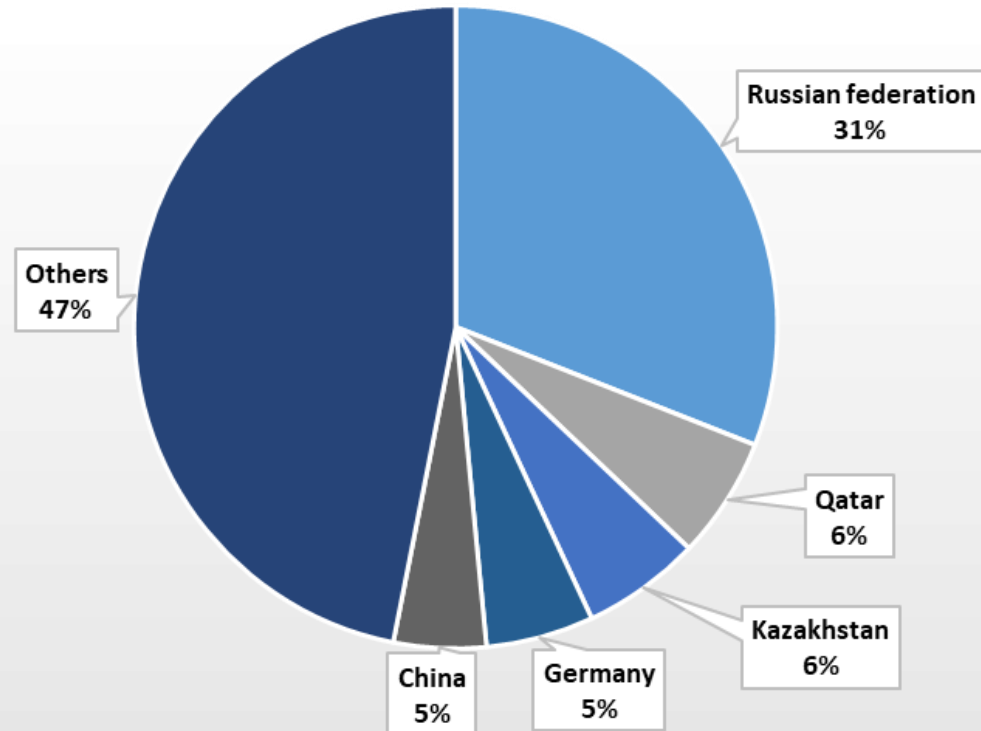
Source: TUIK Foreign Trade Statistics

ALUMINIUM IMPORTS BY COUNTRY

Turkey 2020 Imports (TON)



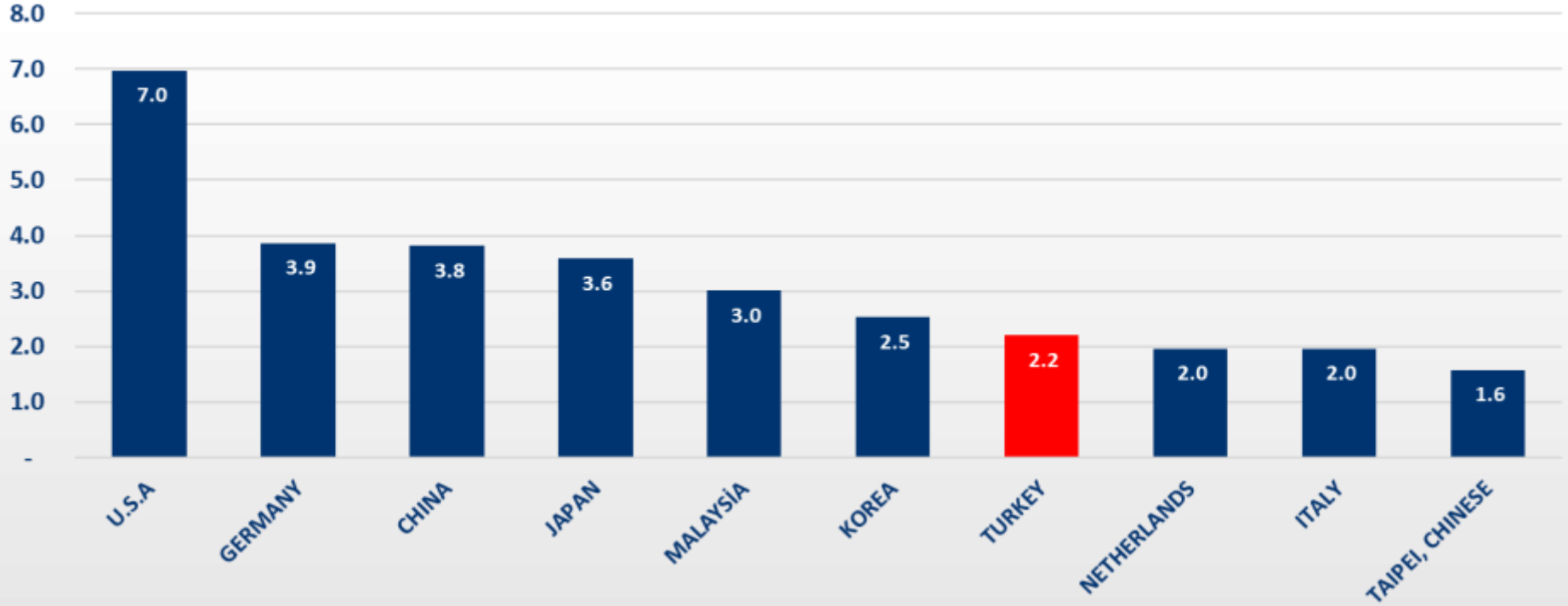
Turkey 2020 Imports (USD)



Turkey ranks 7th among unwrought Aluminium importing countries

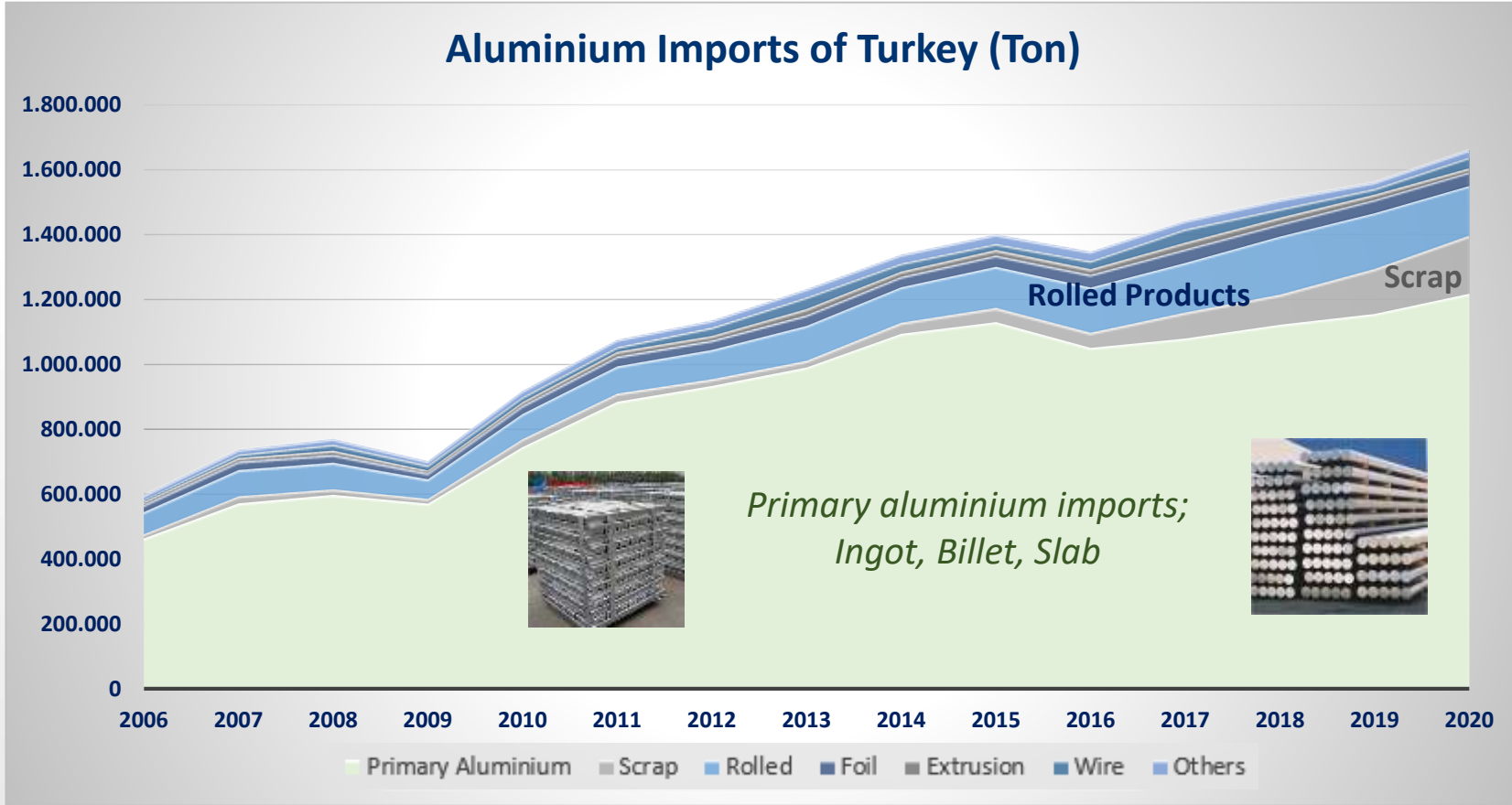


Unwrought Al Imports (USD Billions)



Source: Trade Map

UNWROUGHT ALUMINIUM REPRESENTS 70% OF TOTAL ALUMINIUM IMPORTS



Turkey's aluminum products imports decreased by 1.7% on a US dollar basis in 2020 and amounted to 3.4 billion US dollars. 73% of our imports are Primary Aluminum, and the contribution to recycling tends to increase with scrap imports.



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Source: TUIK Foreign Trade Statistics

Turkish aluminium industry is established as a manufacturing base for semi's and final products

1 smelter



12 wrought aluminium producers



10 rollers, plate manufacturers



78 extruders



13 wire and cable manufacturers



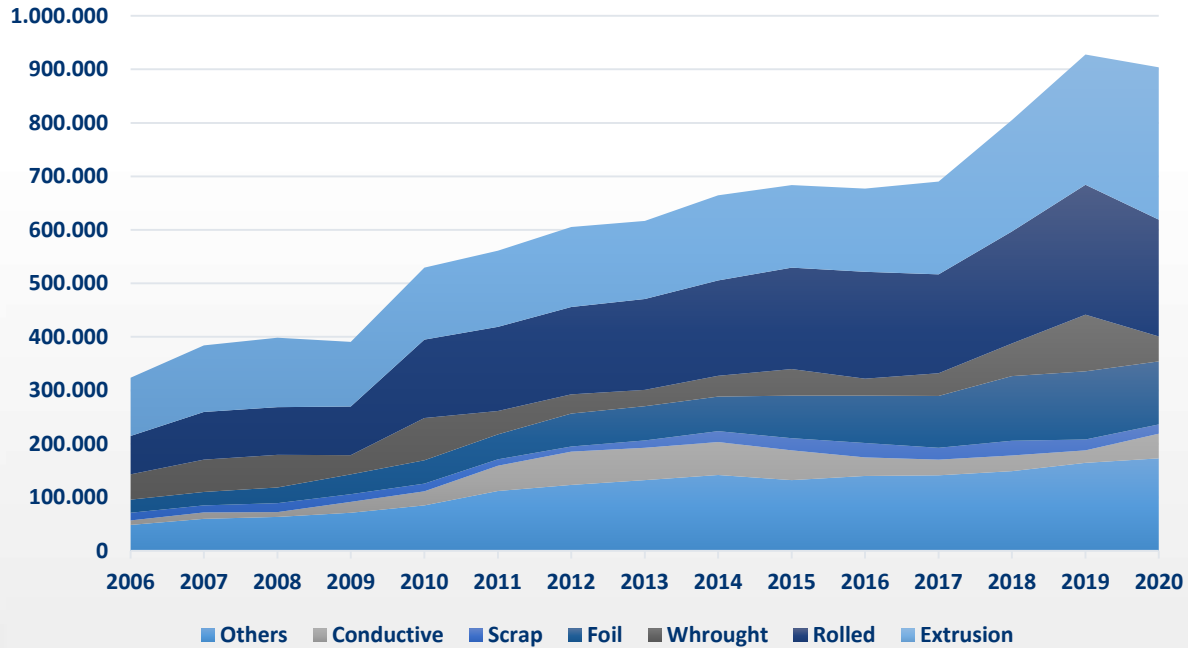
Packaging manufacturers



Promising growth in aluminium exports (2020 total exports 904.000 tons)



Aluminium Exports (ton)

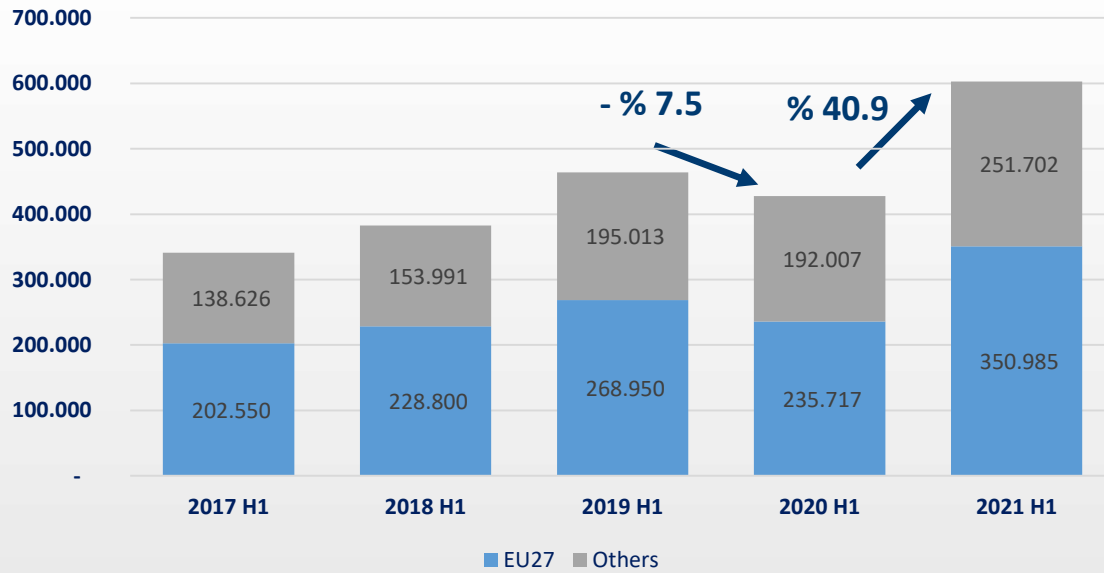


Aluminium industry of Turkey is based on value adding manufacturing processes, with products expanding in global markets

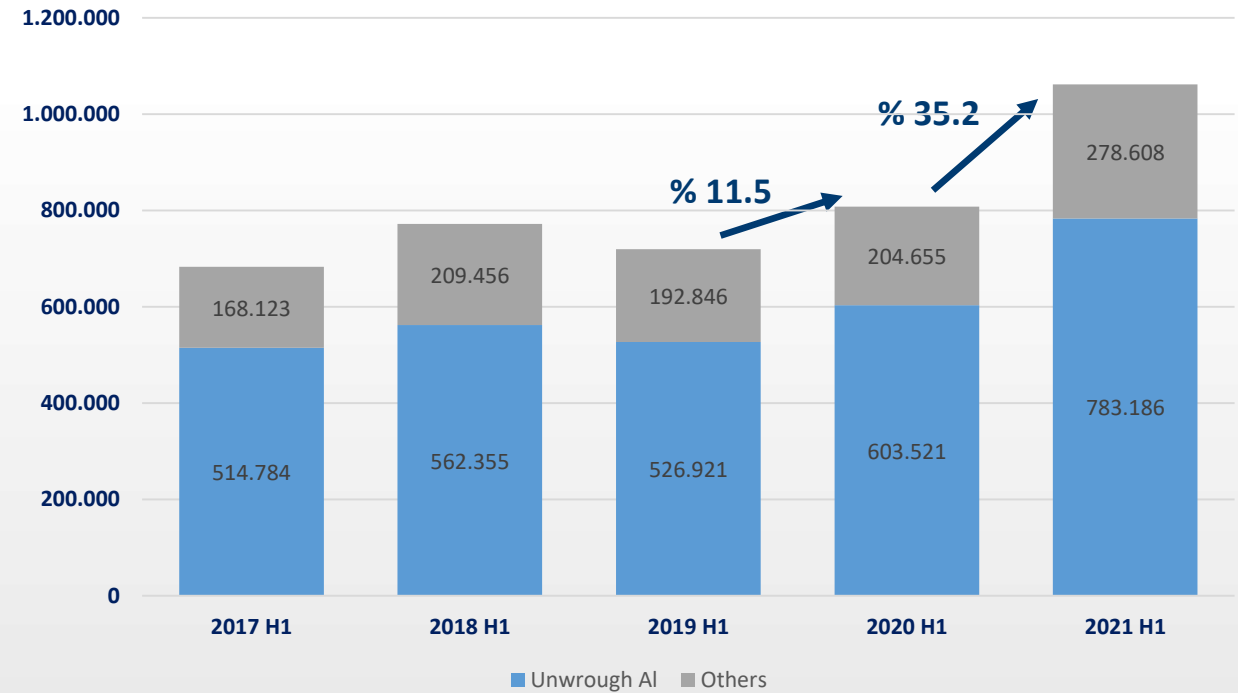


2021 shows strong increase in aluminium manufacturing volumes, both imports and exports have shown significant growth

**ALUMINIUM EXPORTS (TON)
2017 - 2021 H1**



**ALUMINIUM IMPORTS (TON)
2017 - 2021 H1**



Total aluminium exports of Turkey has shown strong increase in 2021 H1, based on this drive total of imports increased by 35.2%;

2021 H1 Total Imports: 1.061.793 tons

2021 H1 Total Exports: 602.686 tons

Turkey is a net importer of Aluminium and Aluminium products



Total imports of aluminium and aluminium products

Total exports of aluminium products

IMPORT & EXPORT TRENDS

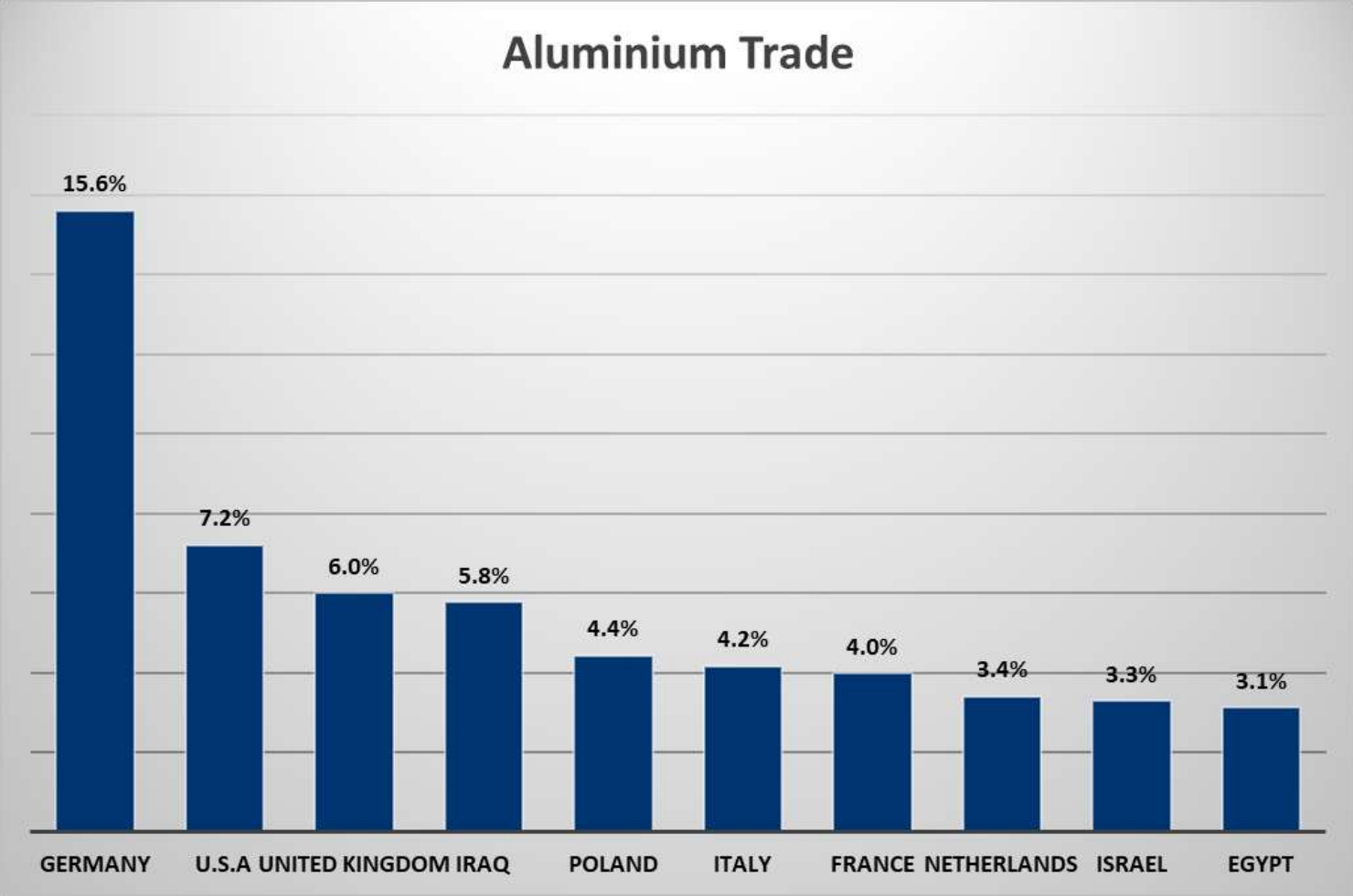
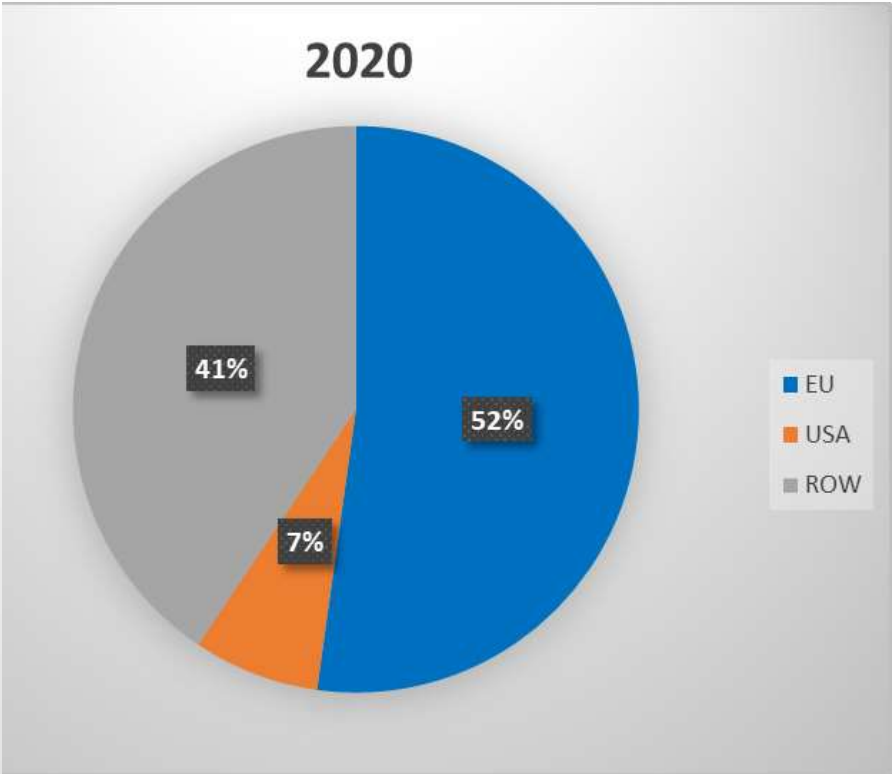


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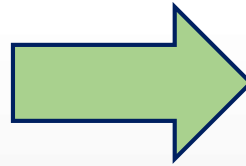
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European Countries represent 52% of exports, together EU and U.S.A represent 60% of Turkey's aluminium exports, while Russian Fed. And Middle East represent 60% of Turkey's aluminium imports



European Green Deal leads to strong trends towards decarbonization and energy efficient systems



- **Carbon Border Adjustment Mechanism**
 - Reduce Carbon Footprint
 - Ensure and certify Carbon Footprint
- **Sustainability and Circular Economy**
 - Increase quantity and quality of recycling
 - Measure and certify recycling content
- **Energy Efficiency**
 - Improve and certify energy efficiency in manufacturing processes
 - Implement energy efficient products
- **Clean Energy**
 - Transition to Renewable energy and Hydrogen
 - Reporting and Certification of RenE

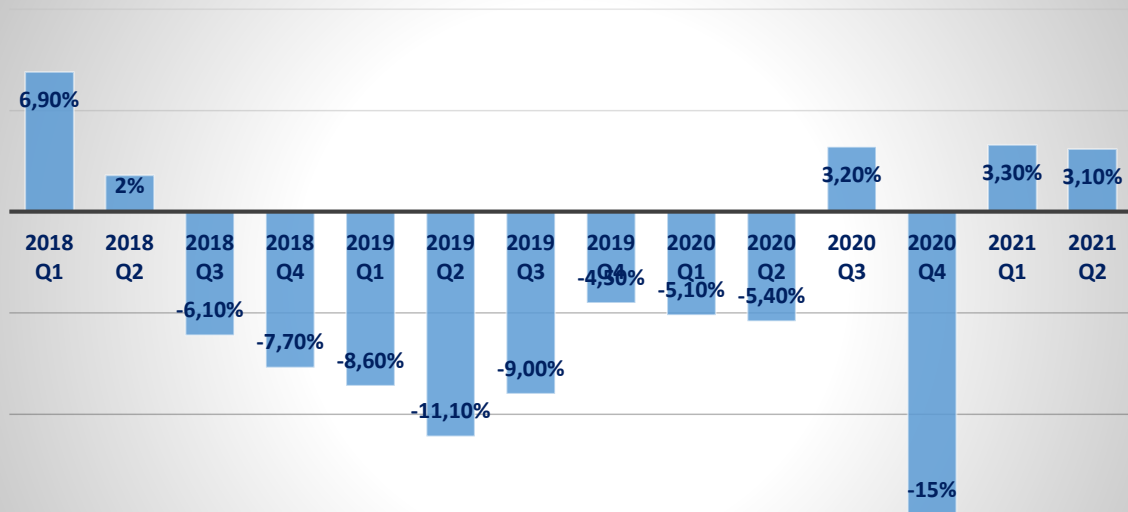
NATIONAL ACTION PLAN ON GREEN DEAL
9 ACTION CATEGORIES, 32 NATIONAL TARGETS AND 81 ACTION ITEMS

- **OUTCOMES for TURKISH ALUMINIUM INDUSTRY**
- Low Carbon aluminium as a primary input of manufacturing systems
 - Increased recycled content
 - Implement Energy Efficiency programs
 - Carbon footprint certification initiatives.

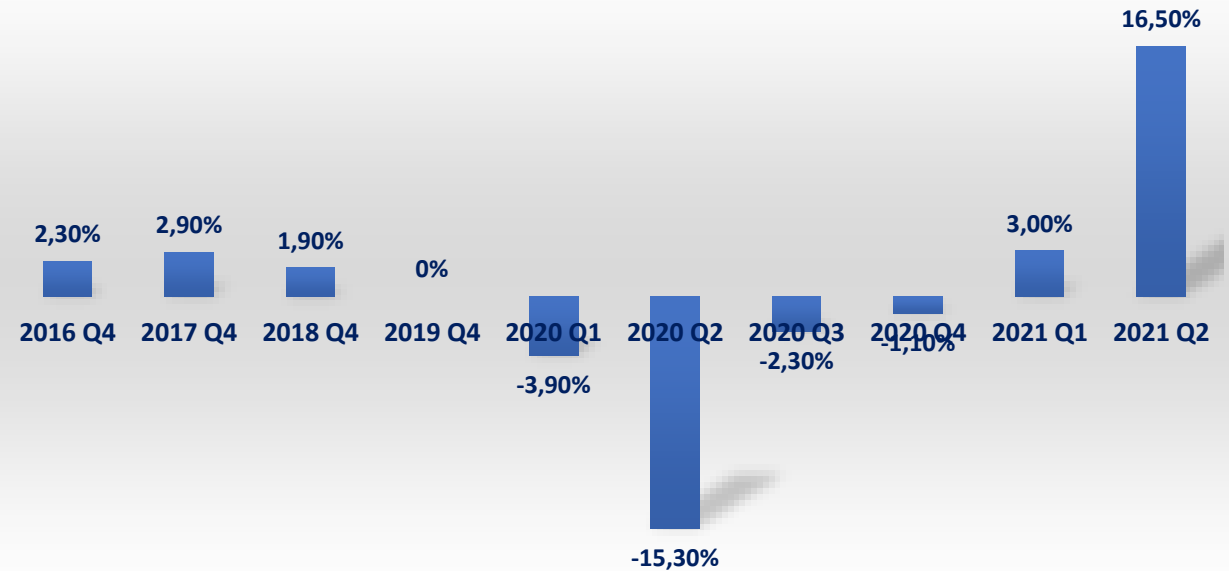
Implementations; Construction Industry

- **Economy:** Growth in Q2, 21.7% sends strong growth signals for the coming months. Forth consecutive strong growth
- **Construction:**
 - After 9 quarters of negative growth, the construction industry in Turkey is finally picking up growth
 - Rebuilding the old houses and buildings, as a part of the “earthquake safety program” would likely to help pick up of construction industry
 - Delayed construction vs demand on new housings, likely to help boosting the construction projects
 - Demand in aluminium extrusion products; 250 ktons up from 221 ktons

Construction in Turkey

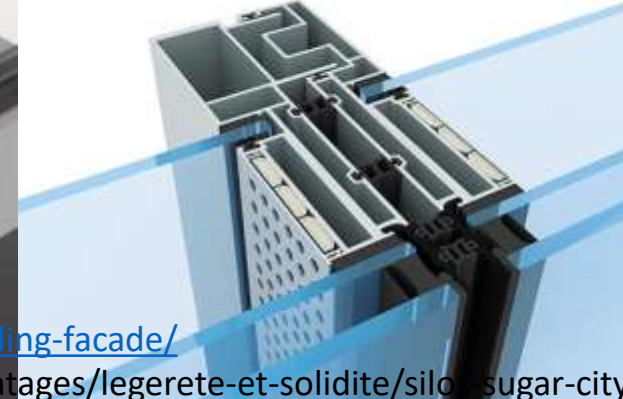
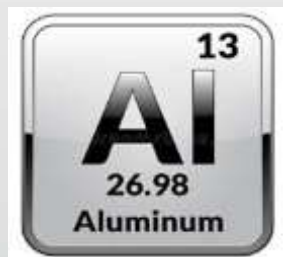
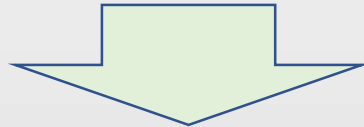


Construction in Euro Area



Aluminium, the “fit material” to meet stringest new standards of the construction industry’s

- **Improved energy efficiency** requirements in new buildings leading to tighter manufacturing standards
- **Durable** materials for longer terms of exposure to external conditions, such as heat, humidity, cold and hot wheater conditions, i.e. resistance to extreme climate conditions, perfect sealing throughout the life time
- Increase in **demand for high rise buildings**, requiring light weight and high strength material properties
- Complicated design parameters, with **rigid specifications**,
 - Better U values, better sound resistance, water penetration resistance
- **%100 recyclability**, the best fit material for new “ sustainability criteria”
- **Exceptional formability** to meet sophisticated façade designs



Sources:

<https://wfmmedia.com/aluminium-extrusion-building-facade/>

<https://greenbuilding.world-aluminium.org/fr/avantages/legerete-et-solidite/silo-sugar-city/>

CONCLUSIONS

- Turkish Aluminium industry is characterized by high import dependency, mainly on unwrought aluminium, an established “manufacturing base” of the region to serve the global demand.
- Increasing intergovernmental concentration and public pressure around the effects of climate change, the strong policy drive by Green Deal would likely to drive aluminium demand
- Aluminium demand would likely to benefit from new policies around decarbonization such as carbon border adjustment mechanism, however, likely to lead to carbon leakage if not supported by a global initiative around certification and standardized reporting.

Thank you

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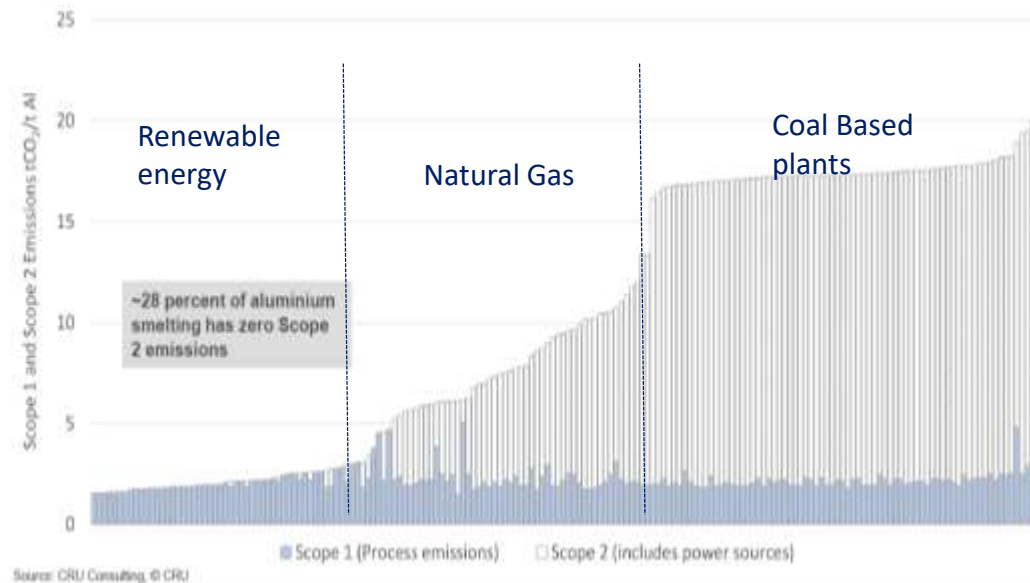
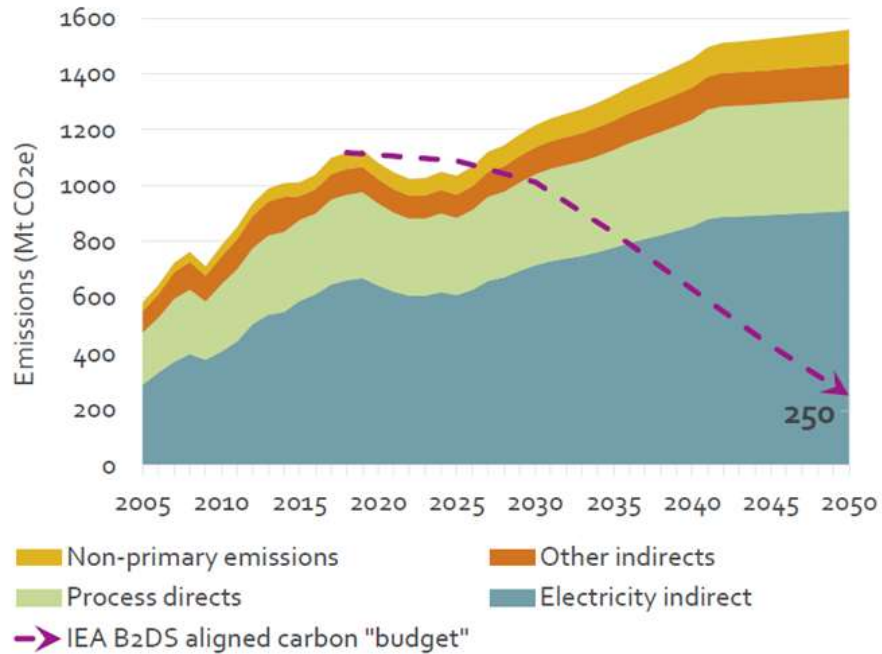


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Thank You...

NET ZERO CARBON EMISSIONS BY 2050

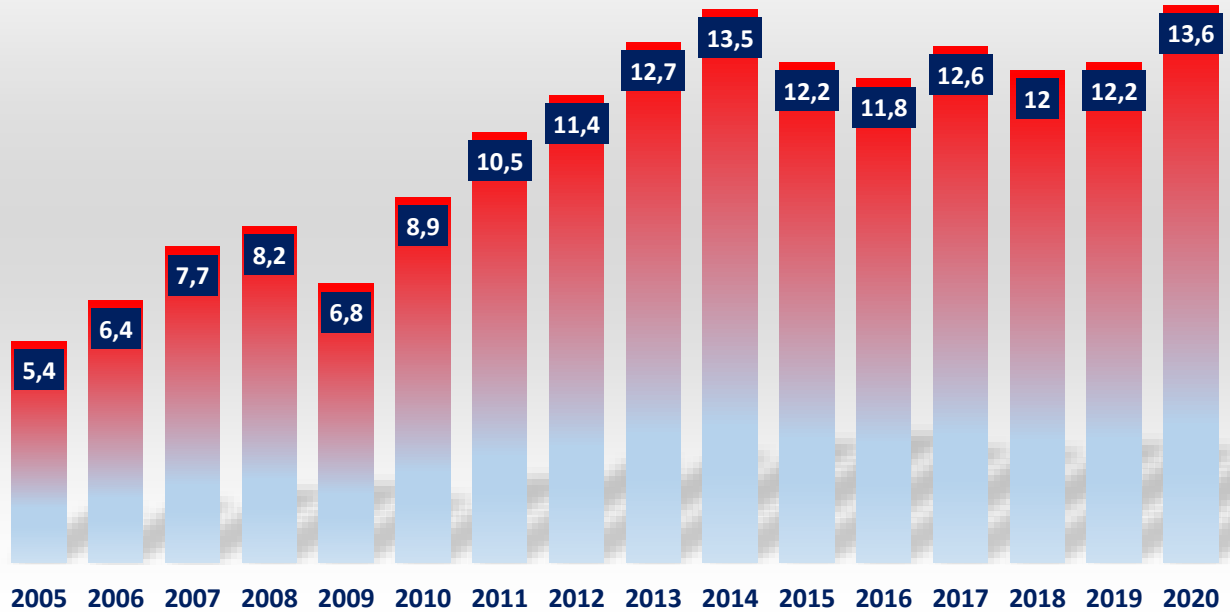
- Aluminium Industry, needs to reduce carbon emissions by %80 until 2050. This is tough target and requires strong international commitment
- Focus will be on primary and alumina production. Coal based and NG powered electricity production should be replaced by non carbon power systems.



Aluminium per capita consumption is around 12,3 kg, slightly above the world average



Aluminum Consumption
kg/capita kg/year



Aluminium Consumption
per capita kg/year

