

World Ceramic Tiles Forum

20th meeting, Rio de Janeiro

National Context

Turkey



World Ceramic Tiles Forum

National Context – Turkey

- I. General economic situation and trend in the construction sector/demand
- II. Trend in production, consumption and trade in ceramic tiles
- III. Latest developments at national level in energy supply regulation and taxation
- IV. Development in standardisation or regulation at national level affecting ceramic tiles
- V. Other national developments

I. General demographic and economic situation,

POPULATION 2012	
75,6	Millions
50,2%	Male
77,3	Living in Urban Area
30,1	Average Age (Years)
67,6%	Age 15-64

GDP	
Years	Billion
2012	\$786,293
2011	\$773,980
Growth in GDP	2,24%

PER CAPITA INCOME	
2012	\$10.504
2011	\$10.444

OTHER RATIOS	
INFLATION RATE	6,16%
OFFICIAL BANK RATE	10,97%
NOMINAL WAGE INCREASE	6,00%
UNEMPLOYMENT	10,10%

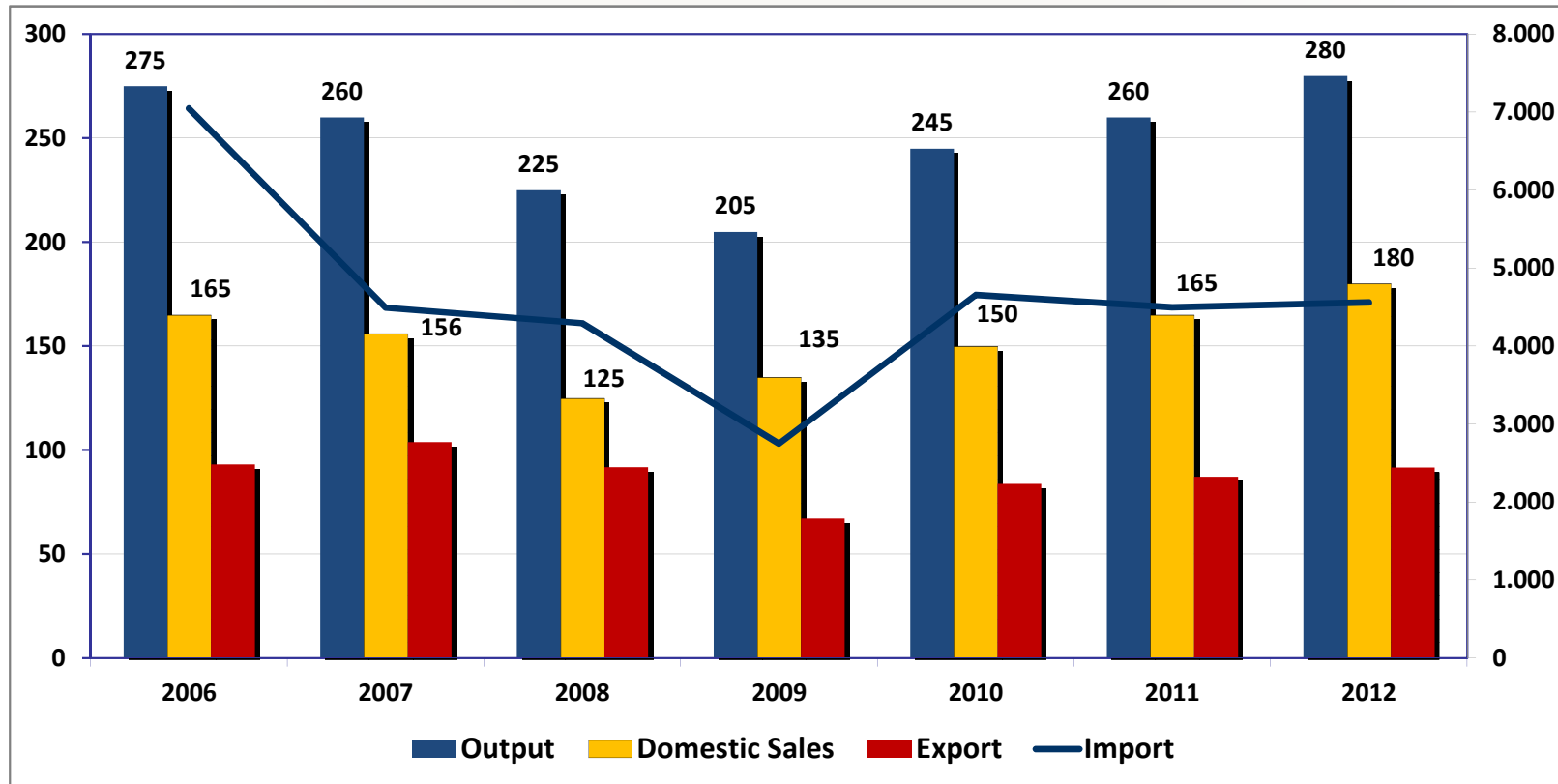
GREATEST ECONOMY ON THE WORLD		
TURKEY	2012	17th.
	2011	18th.
	2004	17th.
	2003	21st.

II. Trend in the construction sector/demand

TWO OR MORE DEWELLING RESIDENTIAL BUILDINGS				
YEARS	OCCUPANCY PERMITS		CONSTRUCTION PERMITS	
	Number of Houses	Surface Area m2	Number of Houses	Surface Area m2
2011	523.484	75.127.127	622.848	89.466.460
2012	516.922	73.545.294	722.508	108.251.890
2012/2011	-1,25%	-2,11%	16,00%	21,00%

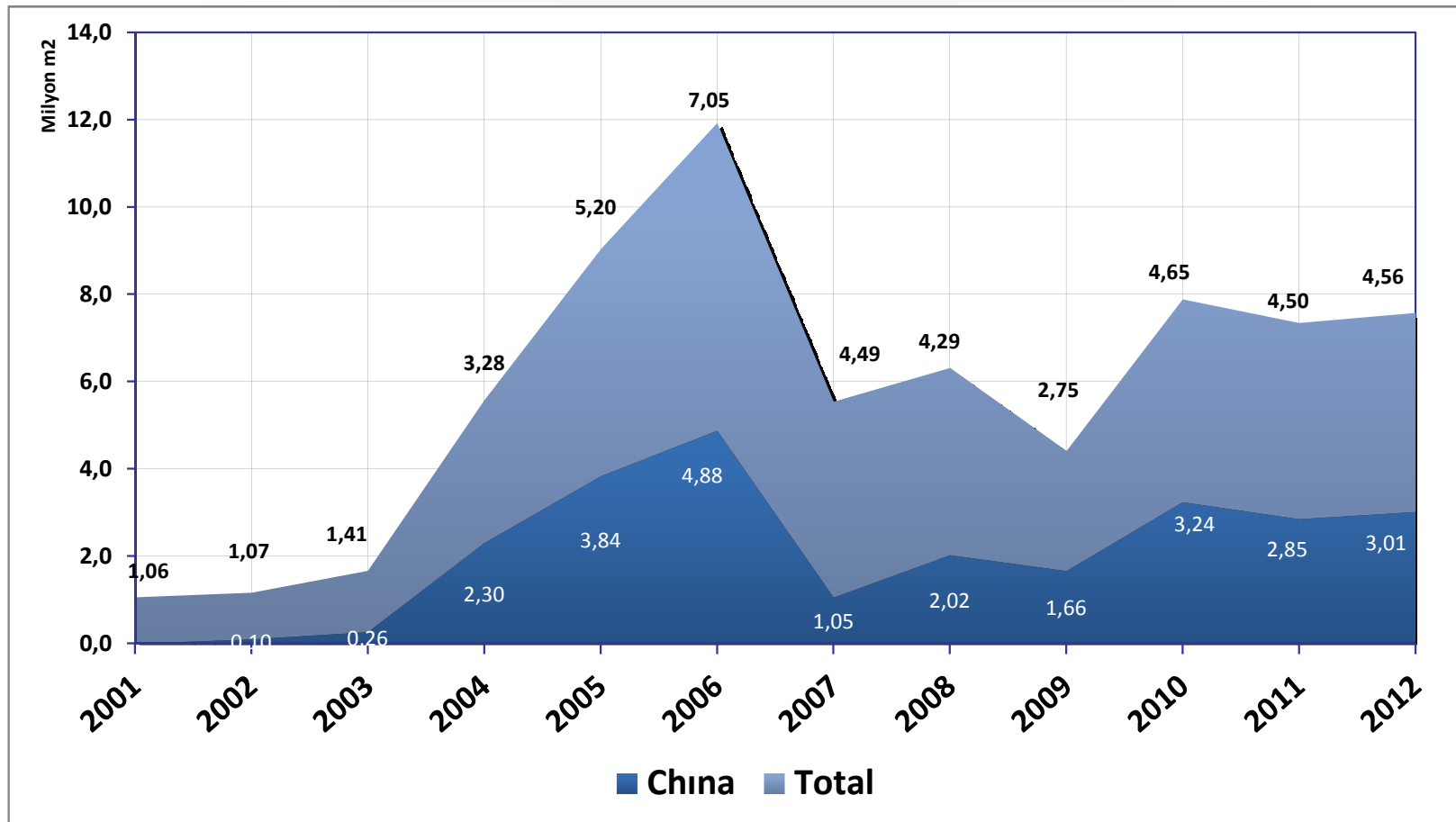
TWO OR MORE DEWELLING RESIDENTIAL BUILDINGS				
YEARS	OCCUPANCY PERMITS		CONSTRUCTION PERMITS	
	Number of Houses	Surface Area m2	Number of Houses	Surface Area m2
2012 First Half	234.457	33.558.104	350.502	52.227.200
2013 First Half	289.159	40.850.889	380.791	57.106.817
2013/2012 First Half	23,33%	21,73%	8,64%	9,34%

III (a). Trend in production, consumption and trade in ceramic tiles



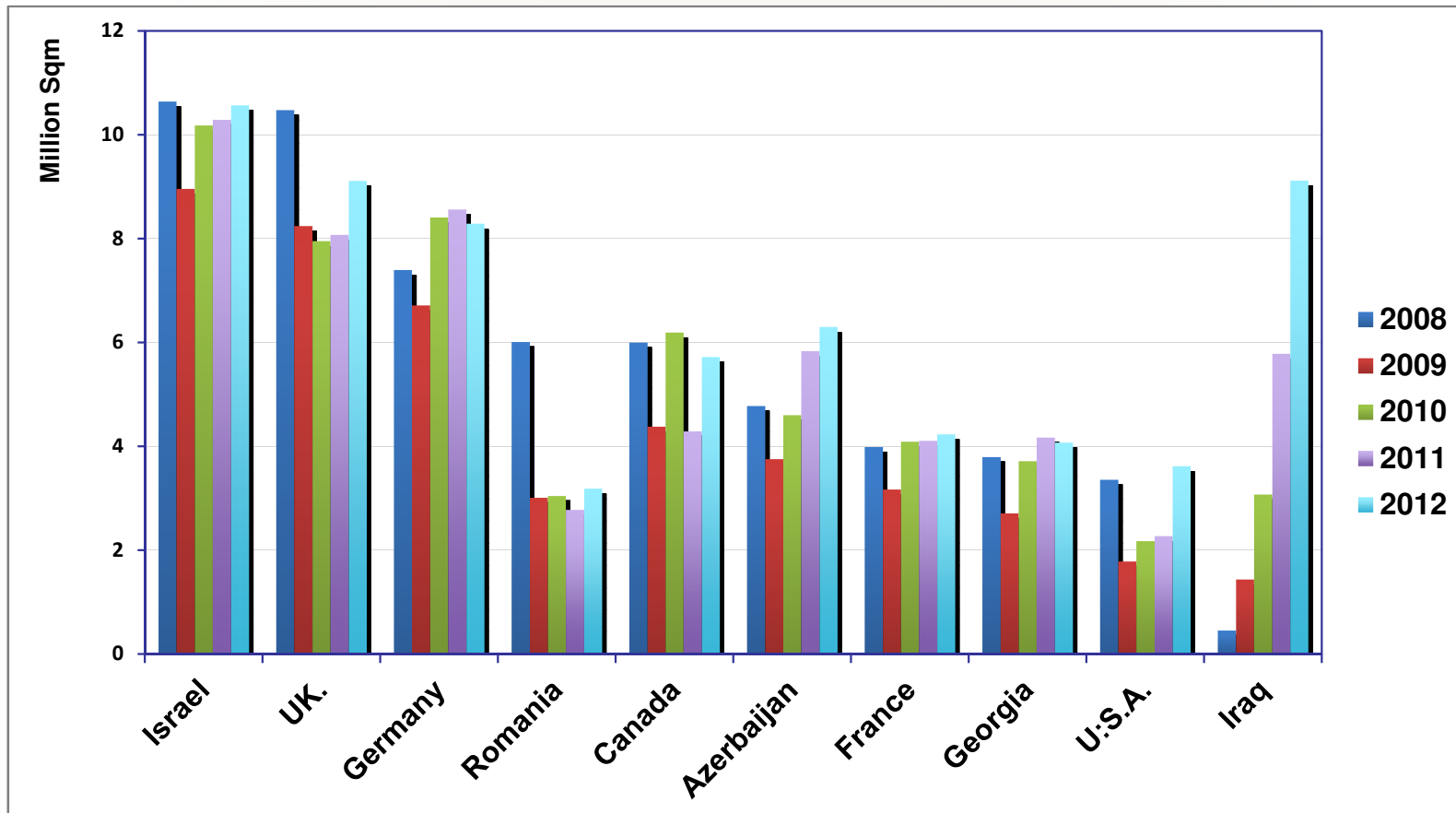
III (b). Trend in production, consumption and trade in ceramic tiles

Ceramic Tile Imports



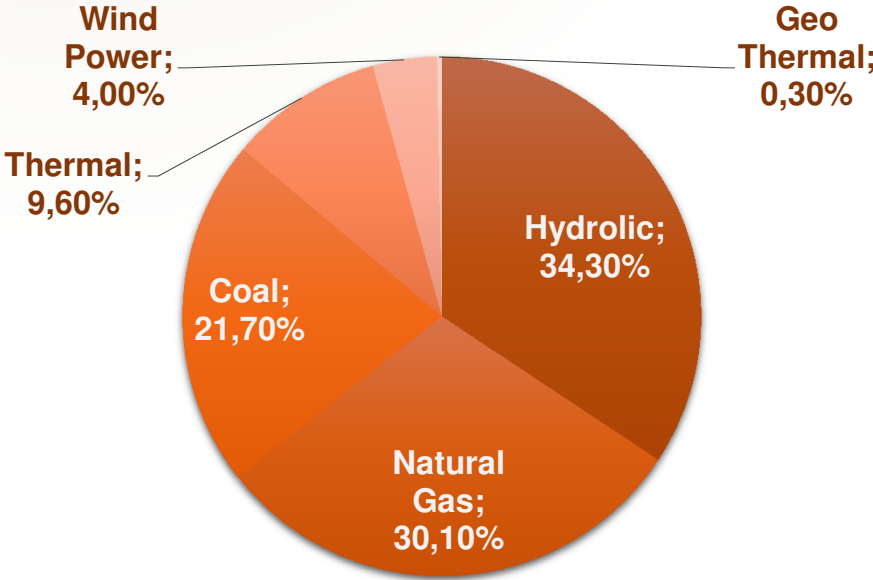
III (c). Trend in production, consumption and trade in ceramic tiles

Ceramic Tile Exports (Sorted 2008)



IV (a). Latest developments at national level in energy supply regulation and taxation

ELECTRICITY	
PRODUCTION (Billion kWh)	
2012	239,5
2011	229,4
CONSUMPTION (Billion kWh)	
2012	242,00
2011	230,50
ESTABLISHED POWER (MW)	
2011	52.800
2012	57.000
2013	61.422



IV (b) . Latest developments at national level in energy supply regulation and taxation

NATURAL GAS	
PRODUCTION (Million M3)	
2012	664
CONSUMPTION (Billion M3)	
2012	45,50
2011	44,20
2020 (Expected)	60,00
IMPORT (Billion M3)	
2011	39,723
2012	43,092

IMPORT SHARE OF THE PRIVET SECTOR	
2012	8%
2013	19%

IV (c) . Latest developments at national level in energy supply regulation and taxation

- **REGULATIONS PUBLISHED ON ENERGY:**
- 14.03.2013 Nr/6446 **Electricity Market Regulation**
- 26.07.2008 Nr/26948 **Amendment on the Natural Gas Market Regulation**
(Various items and descriptions change)
- 25.05.2007 Nr/5669 **Amendment on the Natural Gas Market Regulation**
(Privatization of Ankara City gas distribution)
- 16.06.2005 Nr/5367 **Amendment on the Natural Gas Market Regulation**
(about the number of districts private gas distribution companies may acquire license and BOTAŞ should not make any new gas purchase agreement until it's share decreases to 20% on the market)
- 08.07.2003 Nr/4918 **Amendment on the Natural Gas Market Regulation**
(Privatization of the distribution for the Eskişehir-Bursa cities.)
- 18.04.2001 Nr/4646 **Natural Gas Market Regulation**

IV (d). Any development in standardisation or regulation at national level affecting ceramic tiles

The purpose and the content of the main regulations for gas and electricity:

- To establish an energy market for supply of environment friendly electric and gas energy, continuously to consumers in adequate quantity and quality, with low cost, in free competition by financially strong, consistent and transparent companies and
- To create an independent regulation for control of production, transmission, distribution, wholesale, retail sale, import and export of energy.

IV (c). Any development in standardisation or regulation at national level affecting ceramic tiles

Regulations published for the protection of the environment:

- 25.0.2012 Nr/28274 **Regulation for the Control of Greenhouse Gases**

(monitoring, verifying and reporting the greenhouse gasses originated by the industrial installations)

22.07.2006 Nr/26236 **Regulation for Control of Air Pollution Originated by Industrial Installations.**

(control and prevent air polluting substances delivered to the air by the industrial installations)