

2019 World Ceramic Tiles Forum

6 November - 9 November

Westin Grand Hotel Berlin

Berlin, Germany



2019 World Ceramic Tiles Forum - National Context -

TURKEY



National Context – TURKEY



- I. 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 at national level
- V. Development in regulations at national level affecting ceramic tiles (notably environmental or health & safety regulation (e.g. silica))
- VI. Other national developments



I. Trend in the construction sector/demand

CONSTRUCTION PERMIT				
New buildings and additions by use of building				
Years		Total	One dwelling buildings	Two and more dwelling buildings
2017	Number of buildings	160 959	25 574	113 129
	Floor Area (m2)	283 579 404	5 739 593	218 233 277
	Value (TL)	307 906 500 366	6 051 914 584	239 191 898 911
	Number of dwelling units	1 387 310	25 574	1 354 199
2018	Number of buildings	103 069	21 448	61 410
	Floor Area (m2)	146 683 781	4 516 448	99 038 853
	Value (TL)	200 755 530 107	5 986 041 731	137 228 151 113
	Number of dwelling units	656 120	21 448	631 483
2019	Number of buildings	22 485	6 807	10 643
	Floor Area (m2)	30 496 899	1 349 377	17 813 949
	Value (TL)	48 806 035 903	2 084 935 623	28 865 266 287
	Number of dwelling units	119 982	6 807	112 644

Note: The information for data of 2019 is for the six months of 2019.

OCCUPANCY PERMIT				
Completed or partially completed new buildings and additions by use of building				
Years		Total	One dwelling buildings	Two and more dwelling buildings
2017	Number of buildings	117 465	19 694	83 238
	Floor Area (m2)	161 874 021	4 354 788	121 936 131
	Value (TL)	176 779 066 771	4 629 282 740	134 484 656 582
	Number of dwelling units	824 861	19 694	801 979
2018	Number of buildings	124 223	20 265	87 382
	Floor Area (m2)	170 513 095	4 454 936	129 341 881
	Value (TL)	237 612 306 077	6 047 833 671	181 720 651 845
	Number of dwelling units	873 621	20 265	849 828
2019	Number of buildings	50 277	7 946	35 178
	Floor Area (m2)	80 114 927	1 782 056	60 237 794
	Value (TL)	130 059 102 633	2 831 314 492	98 664 214 243
	Number of dwelling units	389 517	7 946	379 626

Note: The information for data of 2019 is for the six months of 2019.

I. Trend in the construction sector/demand

CONSTRUCTION PERMIT			
New buildings and additions by use of building			
Change 2018/2017	Total	One dwelling buildings	Two and more dwelling buildings
Number of buildings	-36,0%	-16,1%	-45,7%
Floor Area (m2)	-48,3%	-21,3%	-54,6%
Value (TL)	-34,8%	-1,1%	-42,6%
Number of dwelling units	-52,7%	-16,1%	-53,4%

OCCUPANCY PERMIT			
Completed or partially completed new buildings and additions by use of building			
Change 2018/2017	Total	One dwelling buildings	Two and more dwelling buildings
Number of buildings	5,8%	2,9%	5,0%
Floor Area (m2)	5,3%	2,3%	6,1%
Value (TL)	34,4%	30,6%	35,1%
Number of dwelling units	5,9%	2,9%	6,0%

I. Trend in the construction sector/demand

Building Permits Statistics and Percentage Changes									
Building permits					Building permits				
Floor area (m ²)					Number of dwelling unit				
Year	Quarter		Percentage change on the same period of the previous year (%)		Year	Quarter		Percentage change on the same period of the previous year (%)	
	I	II	I	II		I	II	I	II
2017	46 596 507	84 858 068	-15,4	61,4	2017	236 842	425 023	-9,5	68,4
2018	31 626 950	44 742 502	-32,1	-47,3	2018	139 197	216 687	-41,2	-49,0
2019	19 482 088	11 014 811	-38,4	-75,4	2019	76 406	43 578	-45,1	-79,9
Occupancy permits					Occupancy permits				
Floor area (m ²)					Number of dwelling unit				
Year	Quarter		Percentage change on the same period of the previous year (%)		Year	Quarter		Percentage change on the same period of the previous year (%)	
	I	II	I	II		I	II	I	II
2017	39 723 775	37 644 520	23,3	-0,7	2017	196 019	194 140	19,0	3,0
2018	39 954 063	38 012 835	0,6	1,0	2018	203 057	196 631	3,6	1,3
2019	51 776 509	28 338 418	29,6	-25,5	2019	246 419	143 098	21,4	-27,2

I. Trend in the construction sector/demand

Other house sales in detail of first sale and second hand sale by years,

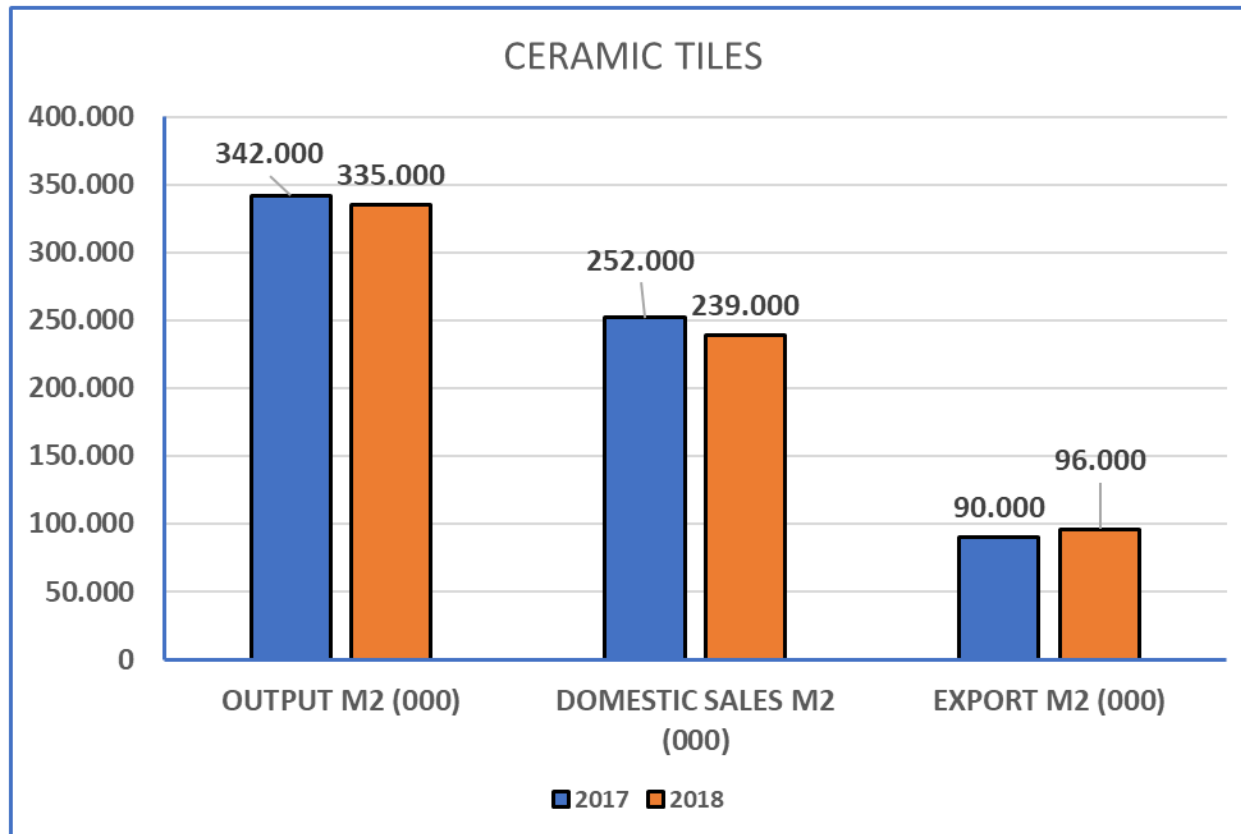
Year		01 January -30 September 2019			Change %		
		Other house sales ⁽¹⁾	First sale ⁽²⁾	Second hand sale ⁽³⁾	Other house sales ⁽¹⁾	First sale ⁽²⁾	Second hand sale ⁽³⁾
2019	Türkiye	677 565	269 892	407 673	-9,19%	-23,34%	3,45%
2018	Türkiye	746.108	352.048	394.060			

(1) Other house sales cover the types of sales other than mortgaged house sales.

(2) First sale is the first time sale of a house that was bought by flat received for landownership agreement made between buyers and firms or persons that build residential.

(3) Second hand sale means that a house sold by an owner, that has bought the house by first sale, to another person.

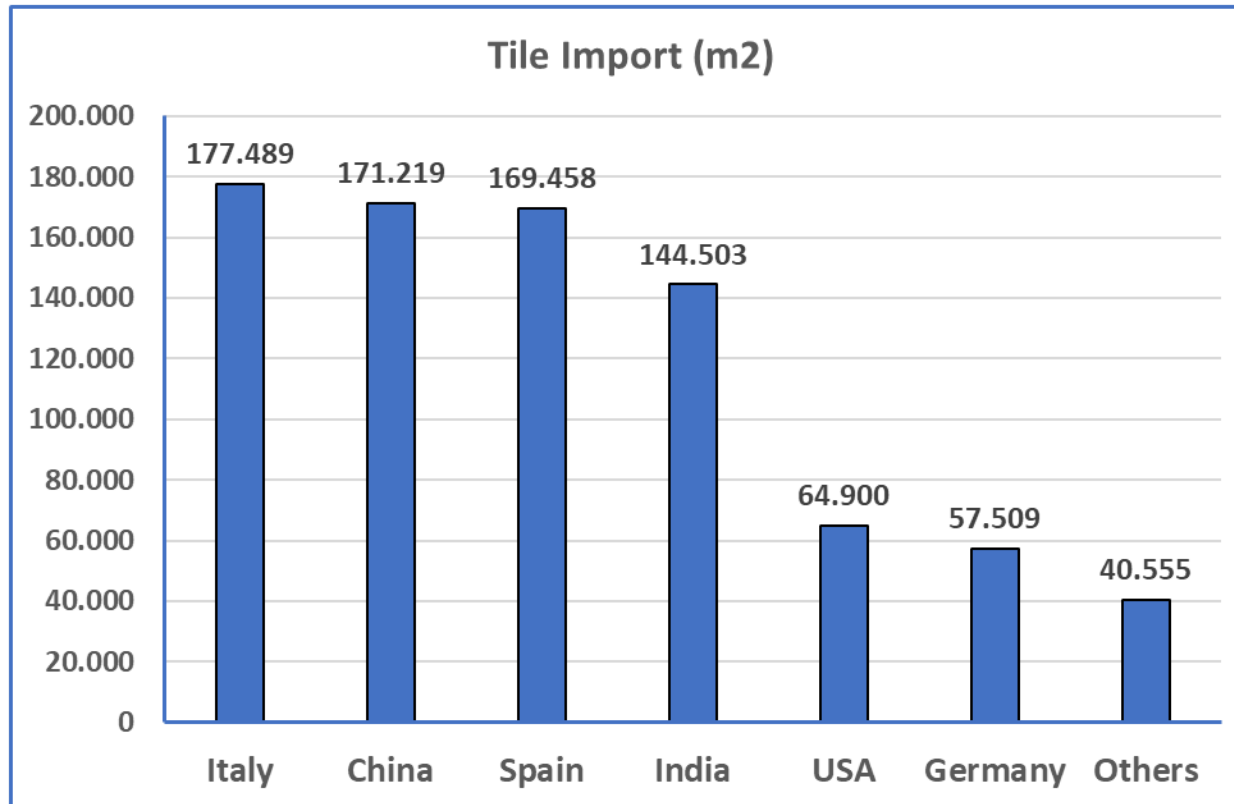
II. Trend in production, consumption and trade in ceramic tiles



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Country: All	Export Tons.	Export m2	Export Dollars	Export Euros
Total 2018 January-December	1.780.550	95.783.335	597.756.864	506.068.662
Total 2017 January-December	1.603.975	89.869.873	551.645.578	488.977.271
Change	11,01%	6,58%	8,36%	3,50%
Country: All	Import Tons.	Import m2	Import Dollars	Import Euros
Total 2018 January-December	16.910	825.633	18.089.526	15.162.045
Total 2017 January-December	25.170	1.255.739	32.683.159	29.038.805
Change	-32,82%	-34,25%	-44,65%	-47,79%

II. Trend in production, consumption and trade in ceramic tiles



III. Latest developments at national level in energy supply regulation and taxation

- **1-Natural Gas Market Law Nr: 4646** with Instruction Nr. 7915 from Energy Market Regulation Board (EPDK)
 - Aim of this Law published at Official Journal dated 02.05.2001 with number 24390 is to liberalise natural gas market and make it financially strong and consistent for consumers to have at a fair play level high quality and environmentally friendly natural gas at an affordable price. For this purpose Energy Market Regulation Board (EPDK) is performing an independent regulation and supervision.
- **2-Electricity Market Law Nr. 6446** with Instruction Nr. 11981 from Energy Market Regulation Board (EPDK)
 - Aim of this Law published at Official Journal dated 30.03.2013 is to establish a financially strong, environmentally friendly, transparent and consistent electricity market operating on a fair play level with special law provisions to supply to consumers high quality electricity energy at an affordable price and to provide an independent regulation and supervision by Regulation Nr. 29313 dated 01.04.2015 through (EPIAŞ) Energy Market Enterprise Corporation



IV. Development in standardisation at national level

TSE Turkish Standards Institute by law adopted all

ISO Standards for Ceramic Tiles

CEN Standards for Ceramic Tiles

As,

National Standards (TSE)

by translating them into Turkish Language

We do not have any other National Standard for ceramic tiles



V. Development in regulations at national level affecting ceramic tiles (notably environmental or health & safety regulation)

1) Current legislation applicable to respirable crystalline silica (RCS)

Regulation for Fighting with Dust Nr. 28812 Published at Official Journal dated 05.11.2013

1.1.0 - Emissions limit in force for respirable crystalline silica: **10 mg/m³ %SiO₂+2**

To be revised for 0,05

1.1.1 Emissions limit in force for Total Silica: **30 mg/m³ %SiO₂+2**

To be revised for %0,3

1.2 - Labelling requirements

1) Current legislation affecting other raw materials (e.g. TiO₂)

2) Other legislation on environment, health or safety



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Thank you for your attention!

