



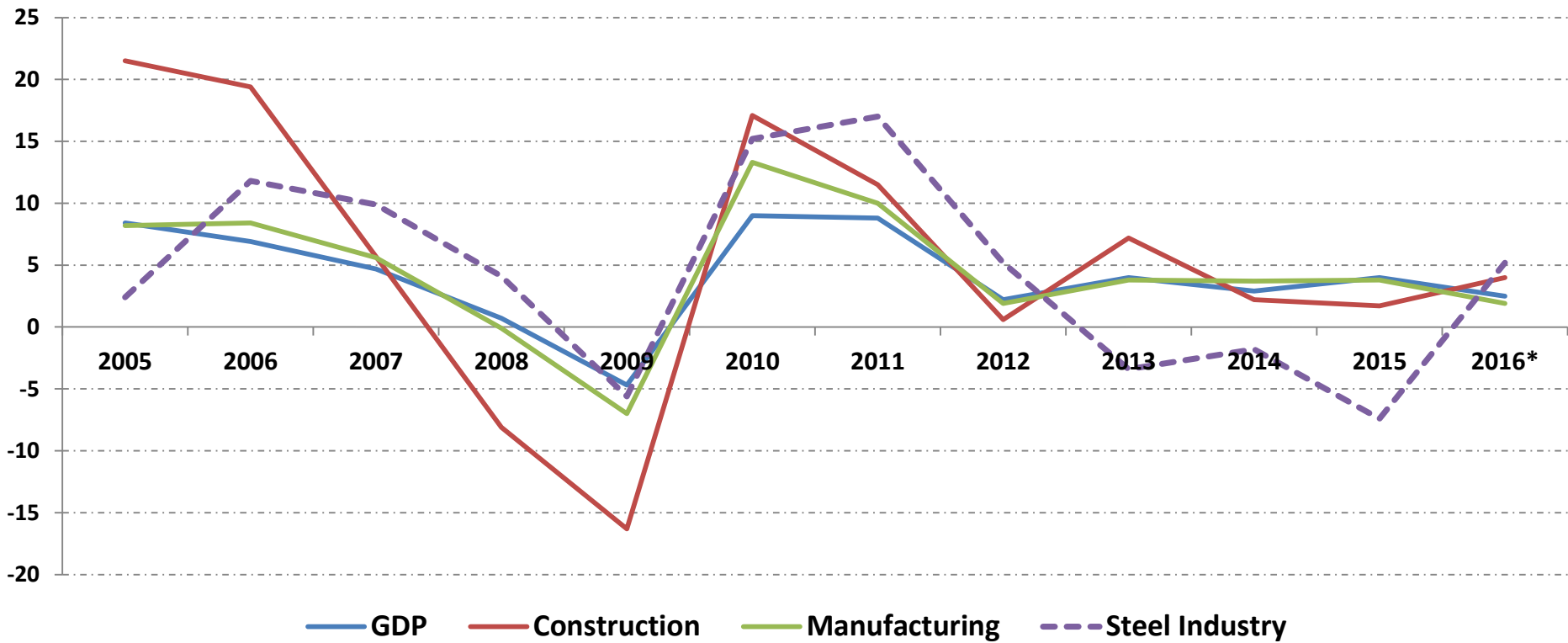
# **CURRENT SITUATION IN TURKISH STEEL INDUSTRY & OUTLOOK**

## **82<sup>nd</sup> OECD Steel Committee Meeting**

**Dr. Veysel Yayan**  
*Secretary General*  
*Turkish Steel Producers Association*

**23-24 March 2017**  
**Paris**

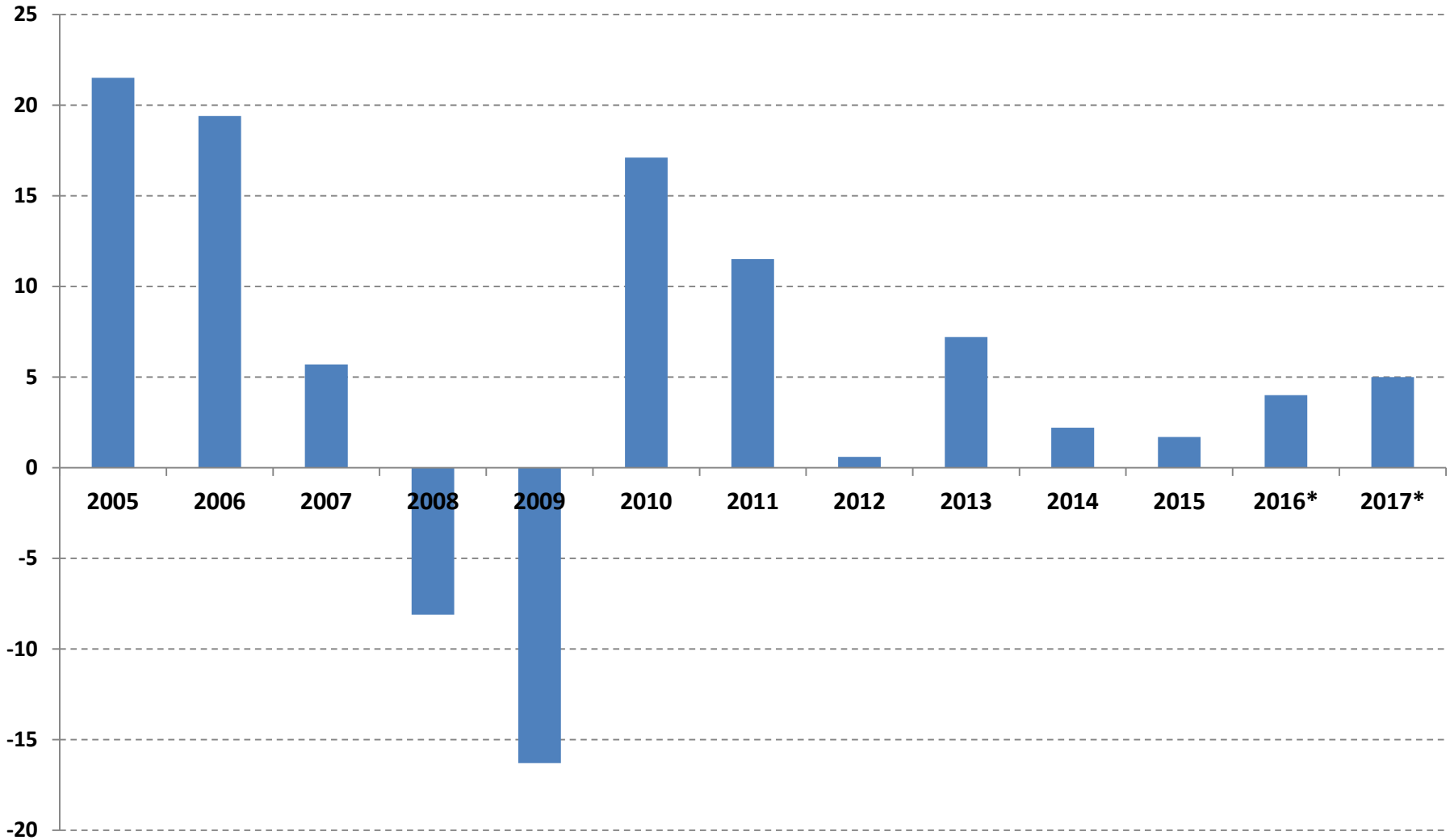
# Development of Turkish Economy, Construction, Manufacturing and Steel Industries (%)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
GDP*	8,4	6,9	4,7	0,7	-4,7	9	8,8	2,2	4,0	2,9	4,0	2,5
Construction*	21,5	19,4	5,7	-8,1	-16,3	17,1	11,5	0,6	7,2	2,2	1,8	4,0
Manufacturing	8,2	8,4	5,6	-0,1	-7	13,3	10	1,9	3,8	3,7	3,7	1,9
Steel Industry	2,4	11,8	9,9	4,1	-5,6	15,2	17	5,2	-3,4	-1,8	-7,4	5,2

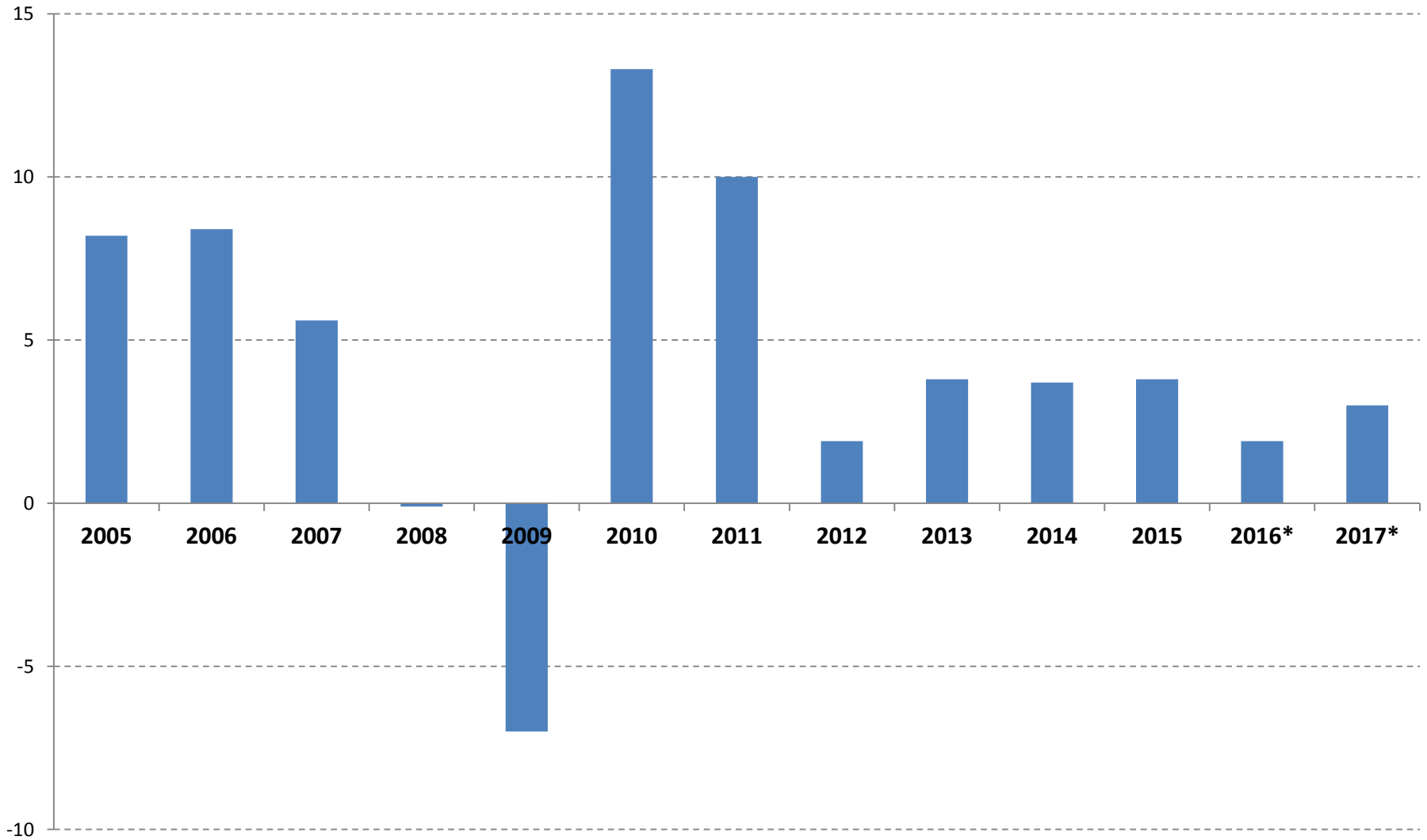
\* 2016 estimated

# Steel Using Industries - Construction



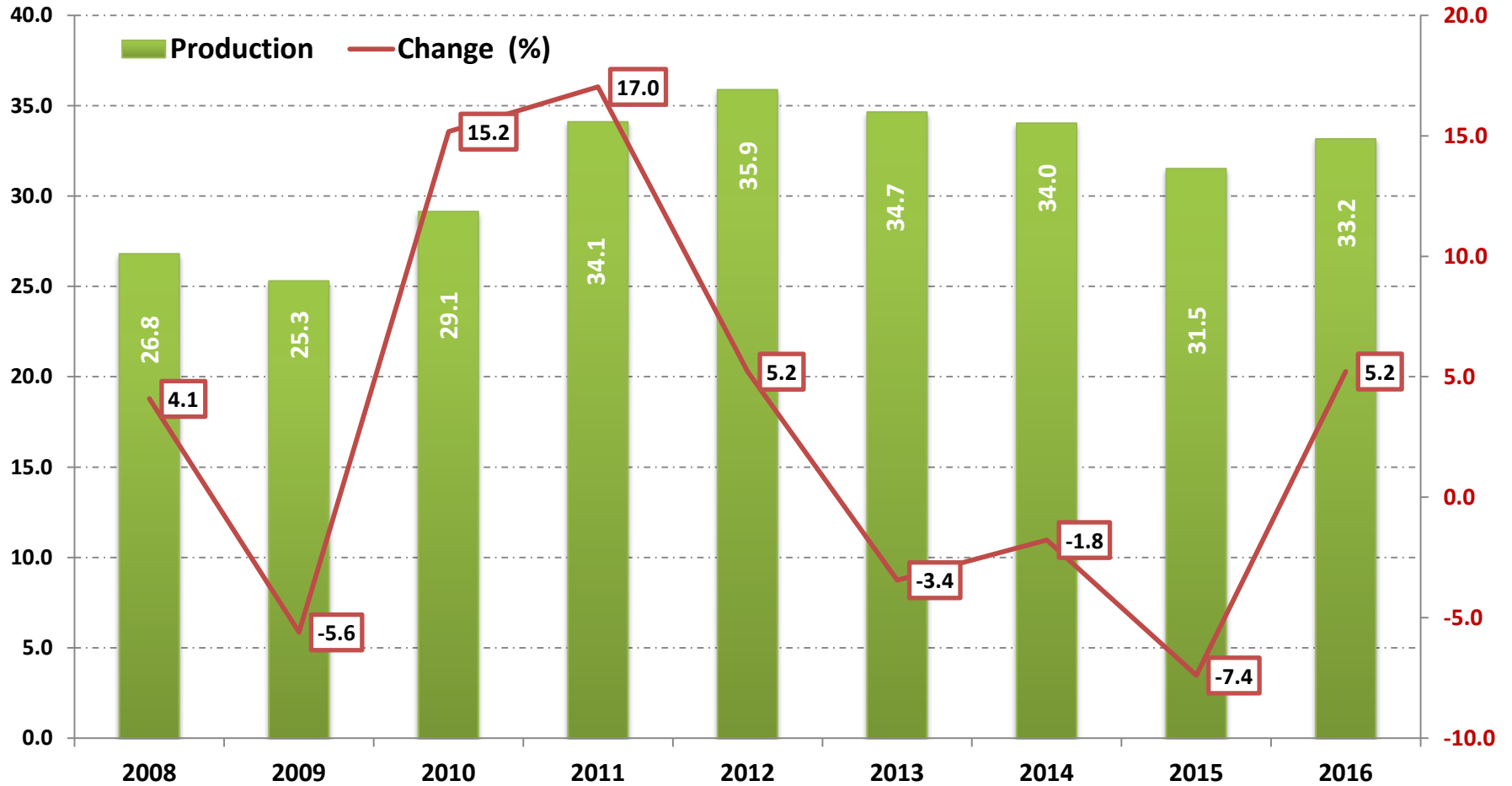
\* estimated

# Steel Using Industries - Manufacturing

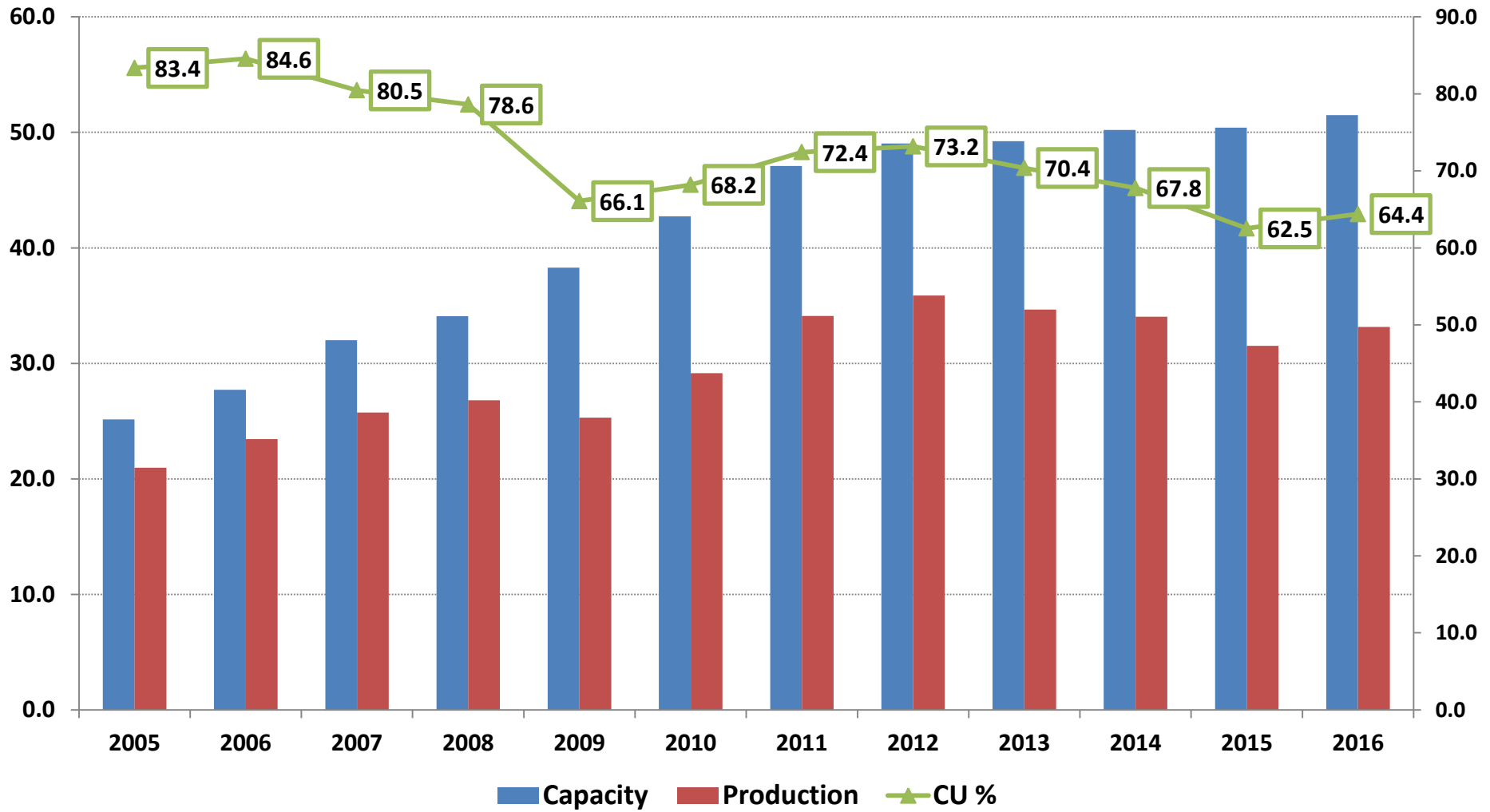


\* estimated

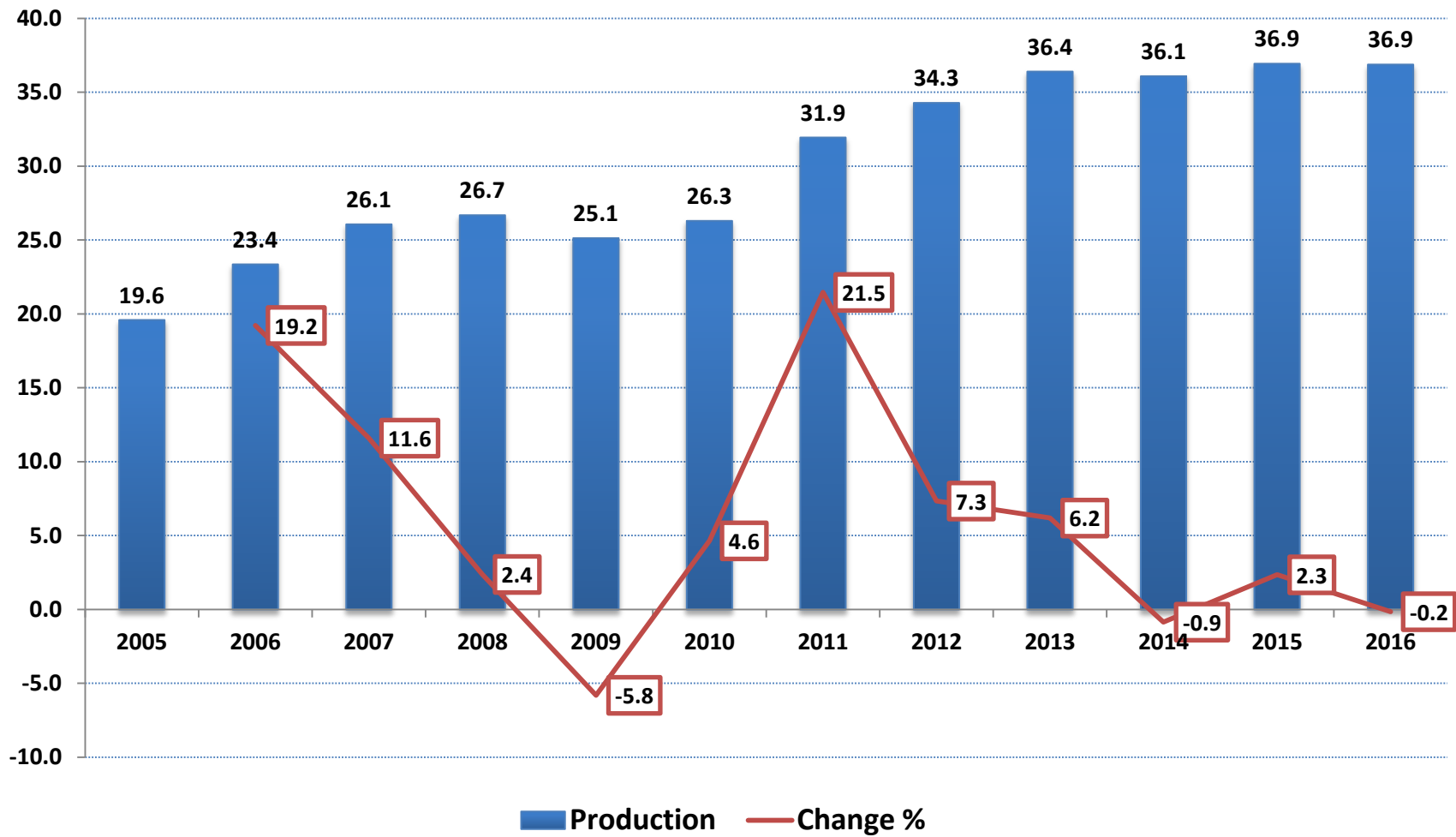
# Crude Steel Production of Turkey (Mt) & yoy Growth (%)



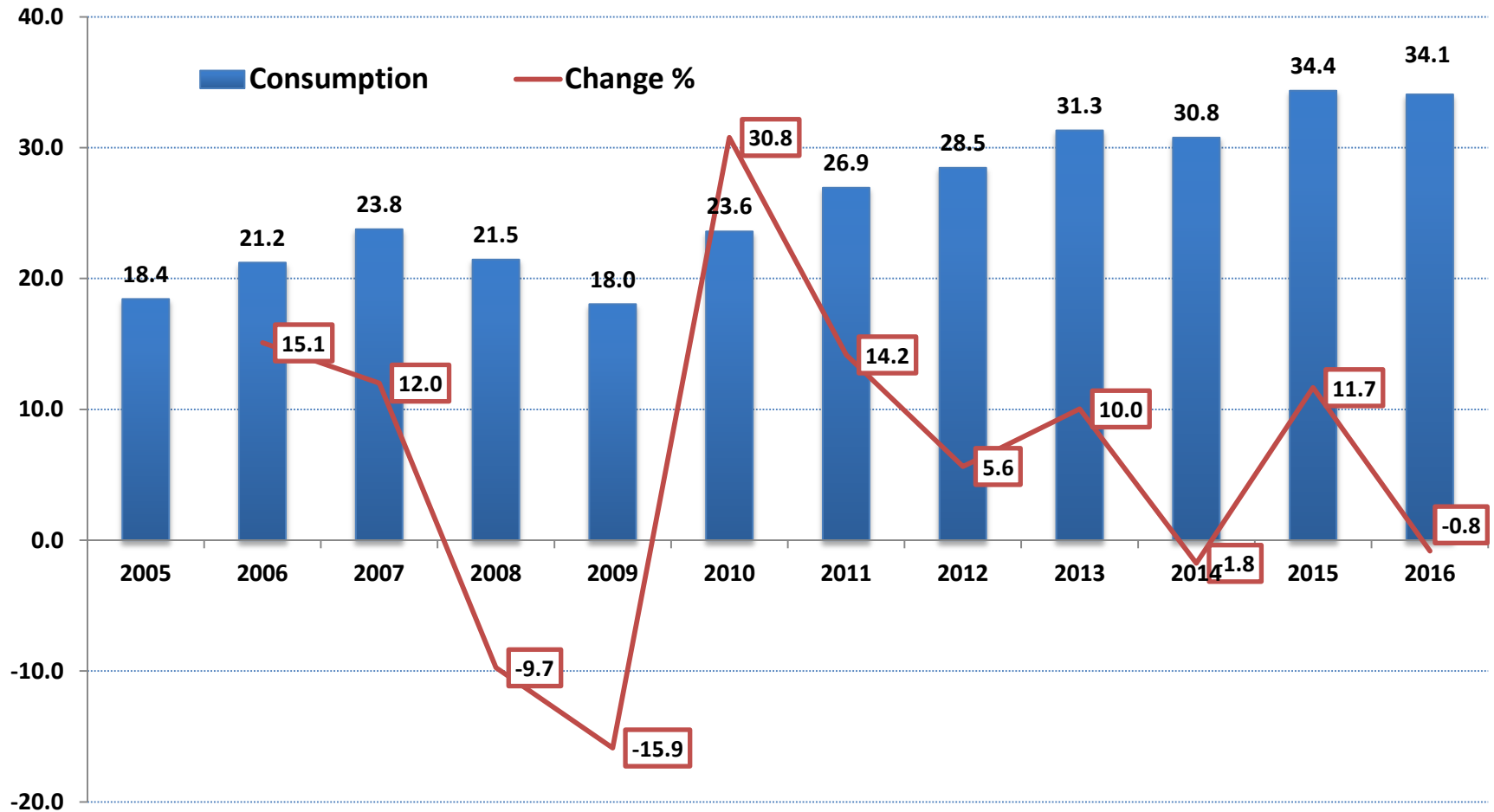
# Turkey's Crude Steel Production Capacity, Production (mt) & Capacity Utilisation (%)



# Turkey's Finished Steel Production (Mt)

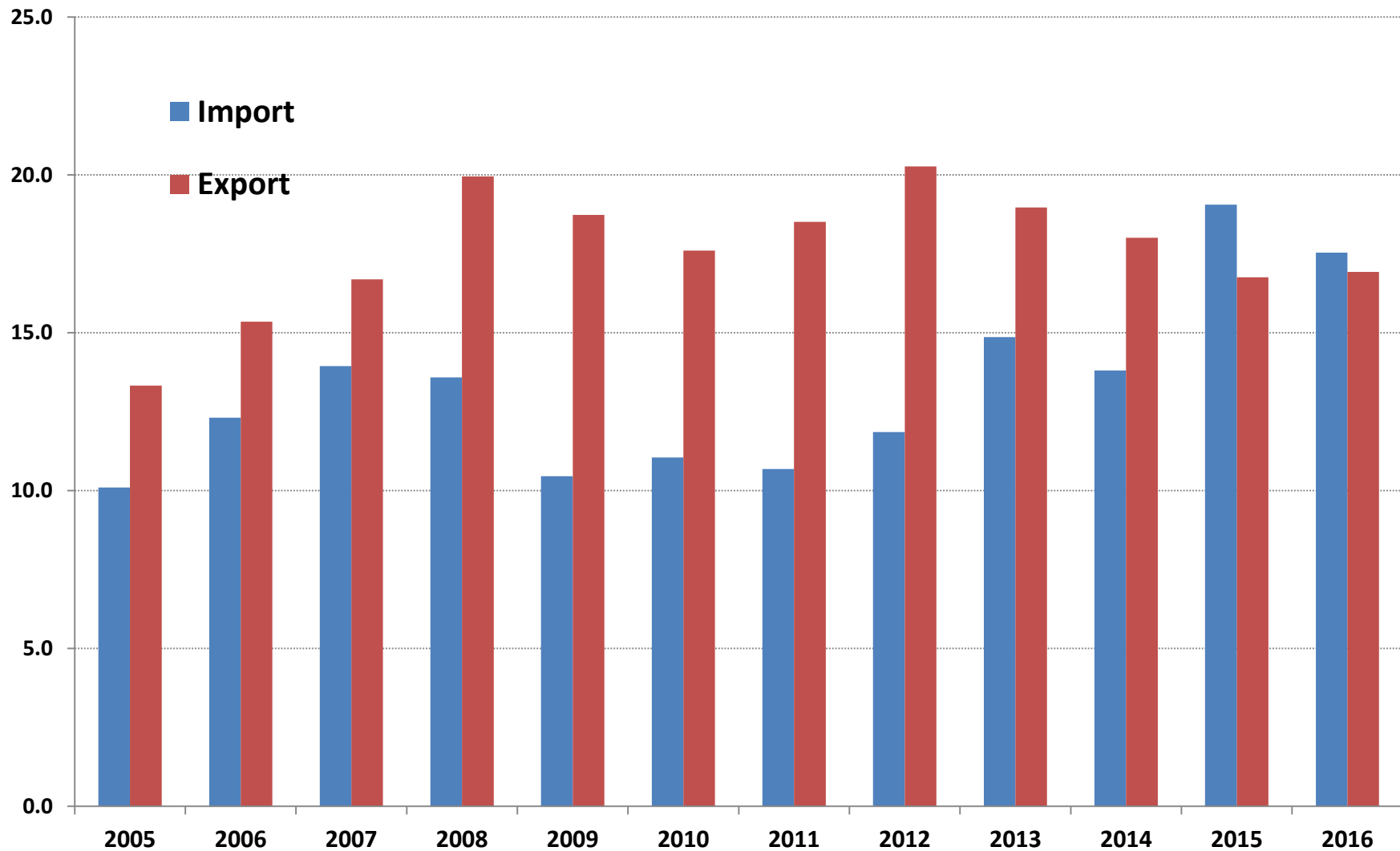


# Turkey's Finished Steel Consumption (Mt)

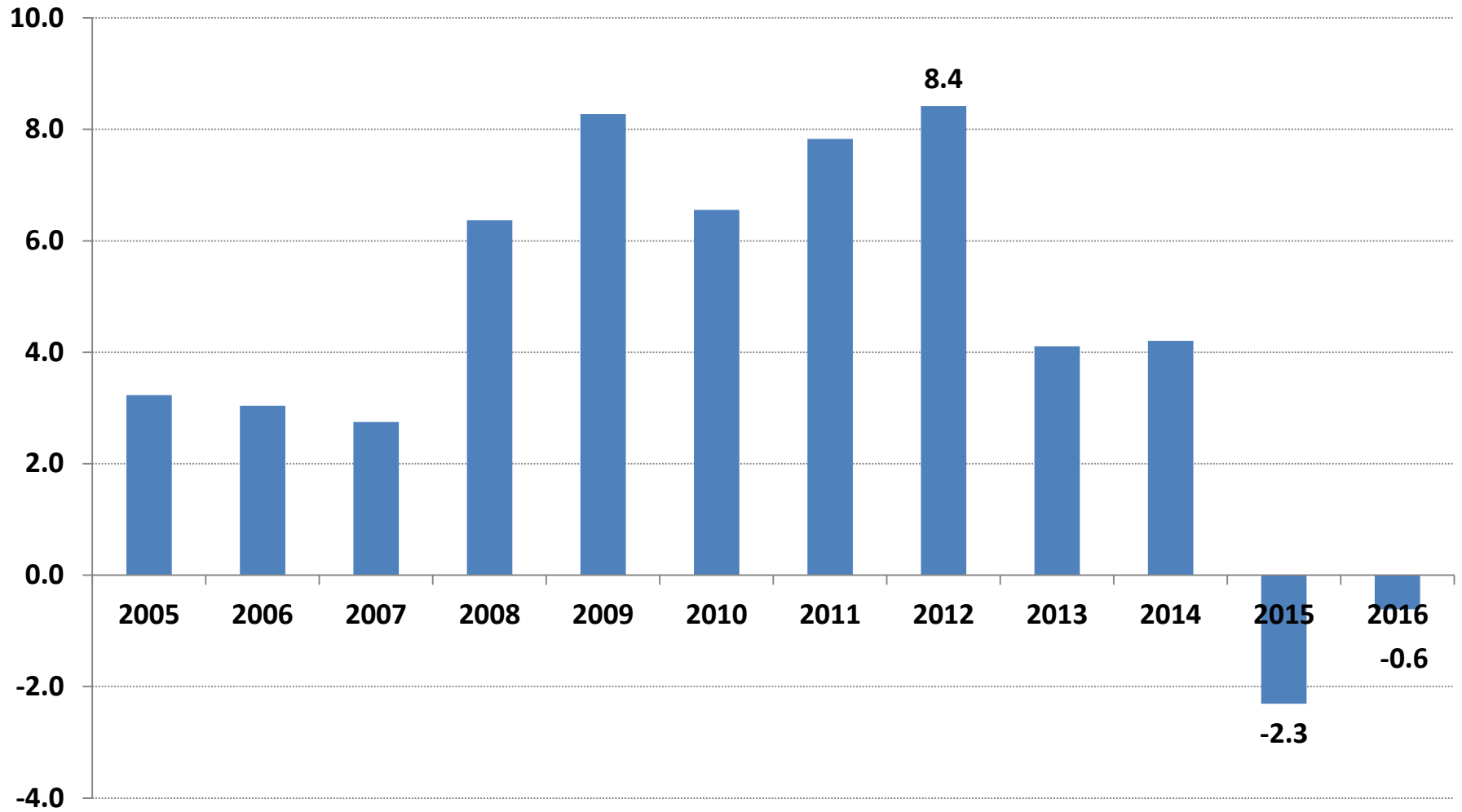




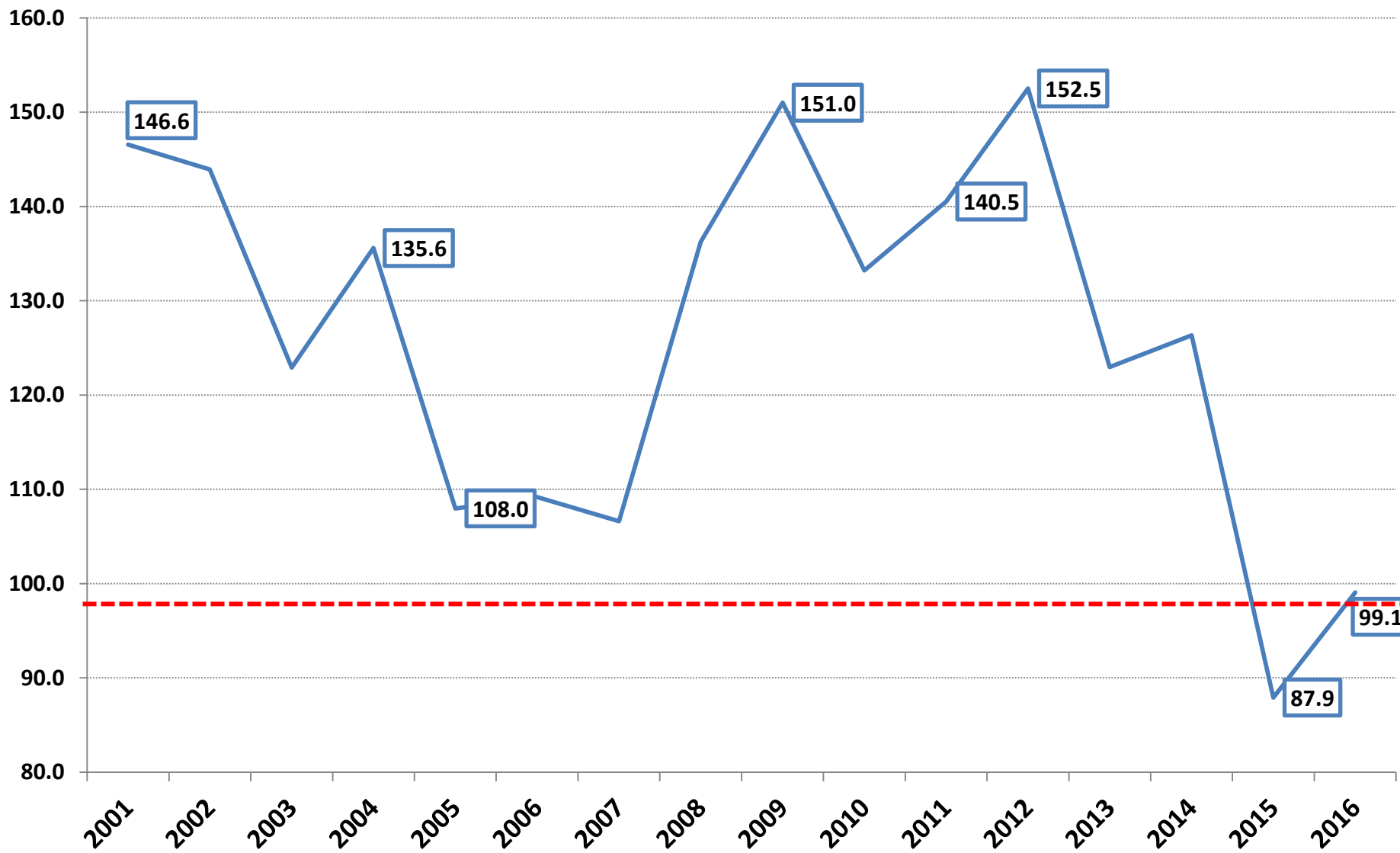
# Turkey's Total Steel Trade (million tons)



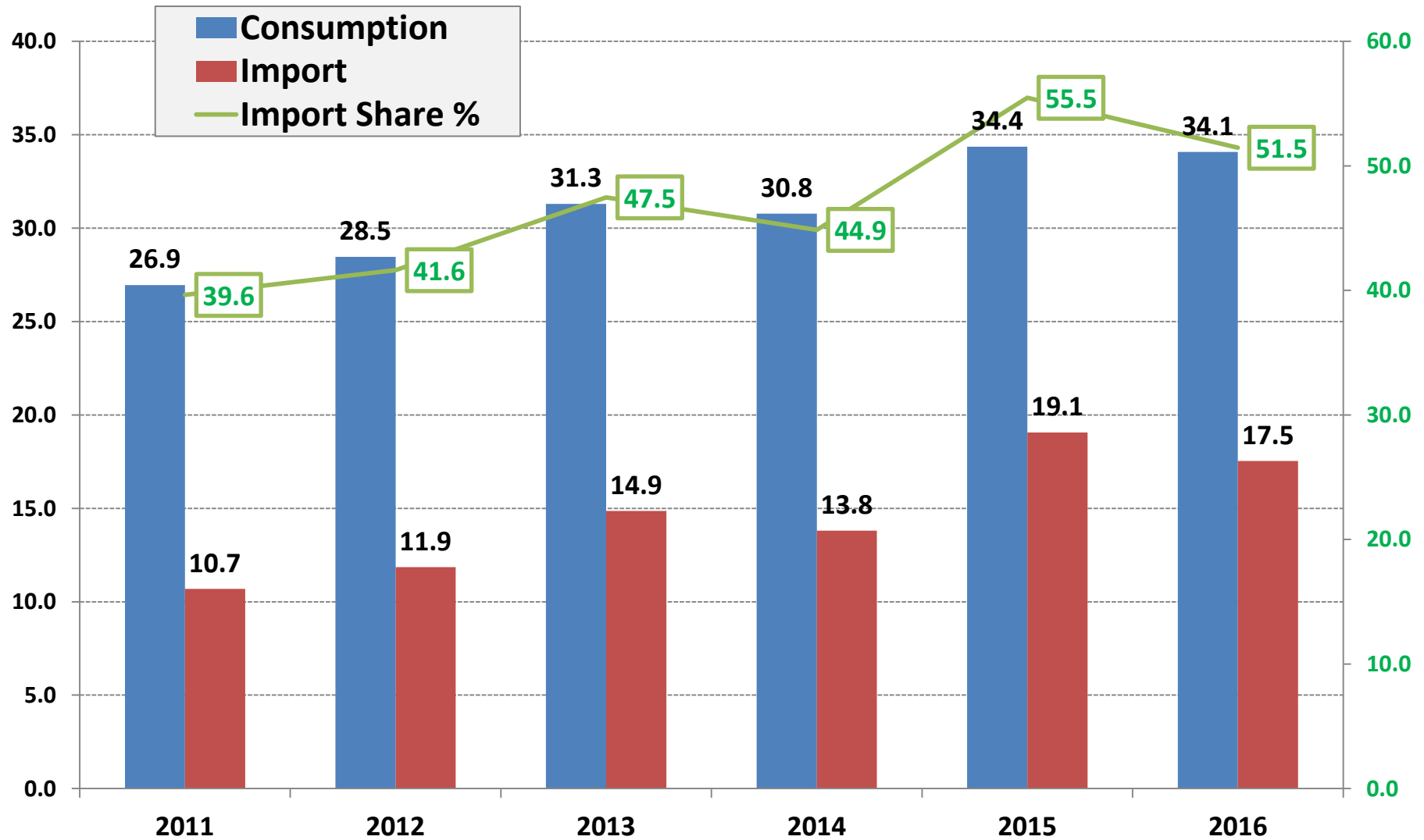
# Turkey's Net Total Steel Export (million tons)



# Turkey's Total Steel Export/Import Ratio, %



# Turkey's Steel Consumption & Import ('000 tons), Share of Import (%)





- Turkish steel industry entered growth trend in 2016 after continued drop in the previous 3 years.
- The global efforts on decreasing market distorting practices, leaving support and incentives for inefficient capacities and eliminating surplus capacity contributed to increasing steel prices globally to a level which can be more comparable with production costs. All these efforts to stabilize the markets, allowed also Turkish steel industry to enter growth tendency again.
- Despite all those efforts to establish balance in the world steel industry, global capacity surplus and market distorting practices in the world steel markets are still an important concern for the Turkish steel industry.
- In addition to the improvement in those global factors, it is expected that the mega projects developed by the Turkish government will increase domestic steel demand and thus support Turkey's steel production growth.