



Türk Plastik Sanayicileri Araştırma, Geliştirme ve Eğitim Vakfı

TURKISH PLASTICS CONSTRUCTION MATERIALS
INDUSTRY FOLLOW UP REPORT
2015 – 6 M
PAGEV
Turkish Plastics Industry Foundation

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EXECUTIVE REPORT

Among all applications of plastics, construction materials, having 20% - 25 volume, is the second most important area after packaging applications.

Share and the growth of plastic construction materials industry continues to increase in total world plastics industry. Total foreign trade volume of plastic construction materials rose to 28 million tons and USD billion 92 in 2014.

In the first six months of 2015 compared to the peers period of 2014, although there have been some increases in unit base, the consumption of plastics construction materials declined in value base due to the impact of declining unit prices.

The forecasts show that there will be increases in unit and value base at the end of 2015, compared to the year of 2014.

PRODUCTION OF PLASTIC CONSTRUCTION MATERIALS:

In Turkey, 697 companies manufacture plastic construction products, and 84% of these companies operate in 9 provinces. The companies operating in İstanbul, İzmir and Ankara make up the 63% of total number of companies in the industry.

The companies operating in construction plastics industry manufacture more than 60 kinds of products. The products which the manufacturers focus on are ; the are profiles, fresh water pipes, waste pipes, pipe connection elements, window systems, bathroom and kitchen sinks, and hoses.

Number of Manufacturing Companies in Construction Plastics

Construction Products	Number of Companies	Construction Products	Number of Companies	Construction Products	Number of Companies
Profile	130	Corner band	8	Wall coating	1
Fresh water pipes	125	Concrete cover	8	Ladder step	1
Window systems and accessories	113	Pressure-resistant pipe	7	Tape measure	1
Waste pipes	106	Electricity pipes	7	Acoustic materials	1
Pipe Connection parts	82	Cable duct	7	Tile	1
Bathroom, kitchen sink	60	Chemical transmission pipes	6	Glazed tile moulding	1
Hose	52	Gutter and accessories	6	Foam Insulation Tape	1
Water and liquid containers	47	Insect screen	6	Mortar Board	1
Insulation materials	47	Rod	5	Ballet	1
Decorative ceiling coverings	42	Connector	5	Elevator plastic parts	1
Jacuzzi, blinds, shutter	38	Ground grids	4	Water meter and acc.	1

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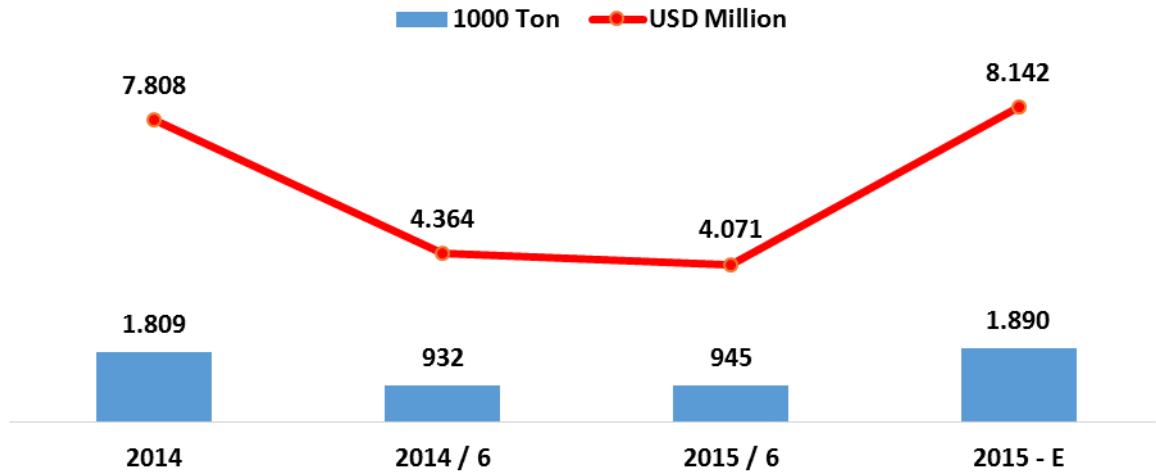
Floor tiles	21	Chimney systems	4	Electric Wire	1
Spiral pipe	16	Tube	3	Clip	1
Sanitation plumbing equip.	15	Board	3	Curtain materials	1
Pool equipment	13	Curtain rod	3	Paint Materials	1
Exterior paint insulation systems	12	Greenhouse	2	Gusset	1
Modular cabin	11	PVC-covered wire	2	Inferior tile	1
Toilet flush	11	Panel	2	Lock	1
Curtain track	10	Water catcher tapes	2	Door handle	1
Roofing	9	CTP pipe tanks	2	Fiberglass mould	1
Skirting	9	Fibre materials	1		
Plates	8	Curtain ring	1		

Source : PAGEV Data Bank

Production of plastics construction materials realised as 945 thousand tons and USD billion of 4,0 in the first half of 2015 increasing by 1,4 % in unit base and decreasing by % 7,1 in value base, compared to the peers period of 2014.

Total production is expected to be 1,9 million tons and USD billion of 8,1 at the end of 2015, increasing by % 4,5 in unit and % 3,8 in value base, compare to 2014.

Plastics Construction Materials Production

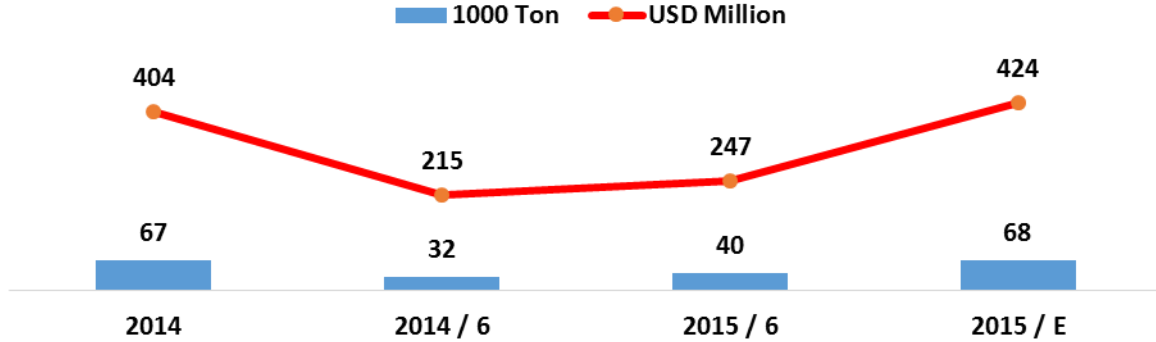


PLASTICS CONSTRUCTION MATERIALS IMPORTS :

Imports of plastics construction materials realised as 34 thousand tons and USD million of 211 in the first half of 2015 increasing by 7,9 % in unit base and decreasing by % 2,2 in value base, compared to the peers period of 2014.

Total imports are expected to be 69 thousand tons and USD million of 421 at the end of 2015, increasing by % 2,3 in unit and % 4,2 in value base, compare to 2014.

Plastics Construction Materials Imports



Plastics Construction Materials Imports (1000 Ton)

HS No	Products Name	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	10	5	6	12	30,0	19,3
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	23	11	12	25	11,1	9,5
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	31	14	13	27	-0,7	-12,0
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	3	2	3	5	15,8	58,3
3925	CONSTRUCTION MATERIALS FROM PLASTIC	7	3	5	9	41,5	44,9
	TOTAL Construction Materials	67	32	34	68	7,9	2,3

Source : Turkish Staistics Department

Plastics Construction Materials Imports (USD Million)

HS No	Products Name	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	52	26	25	51	-3,3	-2,4
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	209	109	101	203	-6,9	-2,8
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	76	36	32	64	-11,8	-16,2
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	28	24	26	52	7,0	82,3
3925	CONSTRUCTION MATERIALS FROM PLASTIC	39	20	26	52	31,7	33,6
	TOTAL Construction Materials	404	215	211	421	-2,2	4,2

Source : Turkish Staistics Department

Plastics construction materials taking part in 39.18 make up the biggest part of the total imports of construction plastics in unit base while the materials in 3917 in value base



Türk Plastik Sanayicileri Araştırma, Geliştirme ve Eğitim Vakfı

PLASTICS CONSTRUCTION MATERIALS IMPORTS BY COUNTRIES :

Turkey imports construction plastics from almost 70 countries. 10 countries shared 74 % in unit base and 80 % of total import in value base in the first half of 2015.

Germany, China, France, Italy, and the USA are the major import partners of Turkey in the construction plastics imports.

Plastics Construction Materials Imports By Countries

2014 / 6			2015 / 6		
ÜLKELER	1000 TON	USD Million	ÜLKELER	1000 TON	USD Million
Germany	6,1	50,7	Germany	7,3	45,3
China	6,9	36,0	China	8,2	42,4
France	2,7	20,0	France	3,7	24,0
Italy	1,7	15,5	Italy	2,3	16,2
USA	1,8	13,9	USA	1,6	12,0
UK	1,3	10,3	UK	1,1	8,1
Belgium	2,2	5,3	Chez Rep.	0,3	4,8
Chez Rep.	0,5	4,7	Spain	0,4	4,8
Spain	0,4	4,7	Poland	1,6	4,8
Poland	1,2	4,4	Belgium	2,2	4,5
Total of 10 Countries	24,8	165,6	Total of 10 Countries	28,8	167,1
Others	10,1	49,8	Others	10,3	43,2
Total	34,9	215,3	Total	39,1	210,3
Share of 10 Countries (%)	71	77	Share of 10 Countries (%)	74	80

Source : Turkish Statistics Department

PLASTICS CONSTRUCTION MATERIALS EXPORTS :

Exports of plastics construction materials realised as 304 thousand tons and USD million of 737 in the first half of 2015 increasing by 15,5 % in unit base and decreasing by % 20,4 in value base, compared to the peers period of 2014.

Total exports are expected to be 607 thousand tons and USD billion of 1,47 at the end of 2015, decreasing by % 14 in unit and % 19 in value base, compare to 2014.

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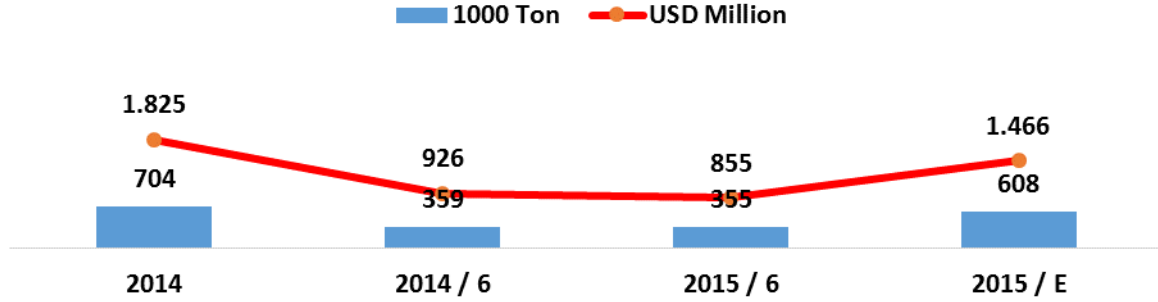
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Plastics Construction Materials Exports



Plastics Construction Materials Exports (1000 Ton)

HS No	Products Name	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	195	97	76	152	-21,5	-22,1
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	351	181	156	312	-13,5	-11,0
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	17	8	8	15	-7,4	-8,6
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	26	13	12	25	-5,0	-3,4
3925	CONSTRUCTION MATERIALS FROM PLASTIC	116	61	51	103	-15,1	-11,0
	TOTAL Construction Materials	704	359	304	607	-15,5	-13,8

Source : Turkish Statistics Department

Plastics Construction Materials Exports (USD Million)

HS No	Products Name	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	407	199	149	298	-24,9	-26,8
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	925	475	382	763	-19,7	-17,5
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	38	19	15	30	-22,1	-22,0
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	128	65	57	113	-12,6	-11,7
3925	CONSTRUCTION MATERIALS FROM PLASTIC	326	168	134	268	-20,0	-17,7
	TOTAL Construction Materials	1.825	926	737	1.473	-20,4	-19,3

Source : Turkish Statistics Department



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Plastics construction materials taking part in 39.17 make up the biggest part of the total exports of construction plastics in unit and value base.

PLASTICS CONSTRUCTION MATERIALS EXPORTS BY COUNTRIES :

Turkey exports construction plastics to more than 150 countries. 10 countries shared 63 % in unit base and 58 % of total export in value base in the first half of 2015.

Iraq, Azerbaijan, Libya and Turkmenistan are the major export partners of Turkey in the construction plastics exports.

Plastics Construction Materials Export By Countries

2014 / 6			2015 / 6		
ÜLKELER	1000 TON	USD Million	ÜLKELER	1000 TON	USD Million
Iraq	94	199	Iraq	68	137
Russian Fed.	24	74	Azerbaijan	18	43
Libya	25	64	Libya	16	38
Azerbaijan	22	54	İran	13	34
Turkmenistan	16	38	Turkmenistan	14	34
Iran	12	34	North Cyprus Turkish Rep.	18	34
Georgia	16	34	Russian Fed.	11	33
Kazakhstan	14	33	Georgia	15	31
Romania	11	28	Romania	11	22
Bulgaria	8	25	Algeria	8	21
Total of 10 Countries	241	582	Total of 10 Countries	192	428
Diğer 150 Ülke Toplamı	118	343	Diğer 150 Ülke Toplamı	111	308
Total	359	926	Total	304	737
İlk 10 Ülke Pay (%)	67	63	İlk 10 Ülke Pay (%)	63	58

Source : Turkish Statistics Department

FOREIGN TRADE BALANCE OF CONSTRUCTION PLASTICS:

Turkey is a net exporter in foreign trade of construction plastics. Foreign trade surplus, which was 634 thousand tonnes and USD billion of 1,4 in 2011, realised as 264 thousand tonnes and USD 526 million in the first half of 2015, decreasing by % 18,5 in unit and % 26 in value base comparing to the perrs period of 2014.

The foreign trade surplus in plastics construction materials is expected to be 529 thousand tons and USD billion of 1,05 at the end of 2015, decreasing by % 16 in unit and % 26 in value base compared to 2014.

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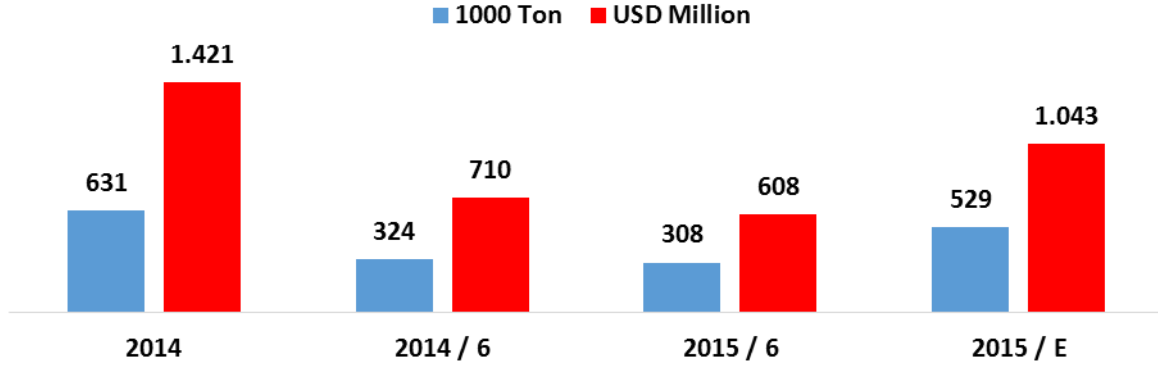
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Foreign Trade Surplus in Plastics Construction Materials



Foreign Trade Balance in Plastics Construction Materials (1000 Tons)

HS No	Products Name	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	3916	92	70	140	-24,1	-24,3
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	3917	169	144	288	-15,1	-12,5
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	3918	-5	-6	-12	9,5	-16,1
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	3922	11	10	20	-9,2	-12,2
3925	CONSTRUCTION MATERIALS FROM PLASTIC	3925	57	47	93	-18,4	-14,4
	TOTAL Construction Materials		324	264	529	-18,5	-16,2

Source : Turkish Statistics Department

Plastics construction materials taking part in 39.17 make up the biggest part of the total foreign trade surplus of construction plastics in the first half of 2015.

Foreign Trade Balance in Plastics Construction Materials (USD Million)

HS No	Products Name	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	356	173	124	248	-28,2	-30,3
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	716	366	280	561	-23,5	-21,8
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	-38	-17	-17	-34	0,0	-10,2
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	100	40	31	61	-24,4	-38,6
3925	CONSTRUCTION MATERIALS FROM PLASTIC	287	148	108	216	-26,9	-24,7
	TOTAL Construction Materials	1.421	710	526	1.052	-26,0	-26,0

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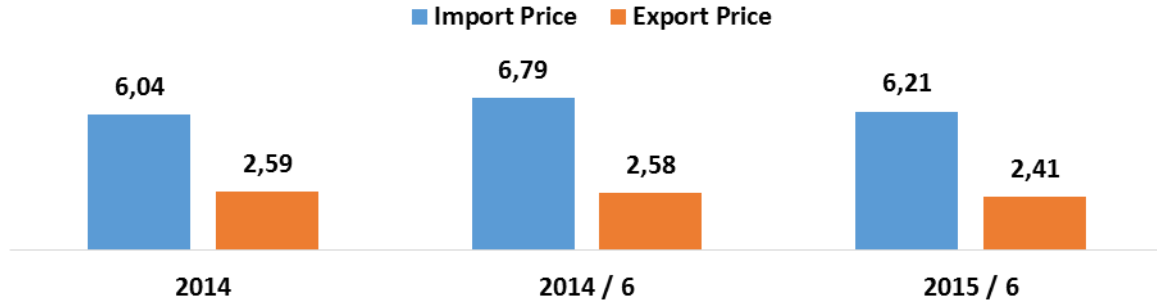


Source : Turkish Statistics Department

AVERAGE UNIT PRICES IN FOREIGN TRADE OF PLASTIC CONSTRUCTION MATERIALS:

Even though Turkey has foreign trade surplus in construction plastics, import unit prices are more than 2 times the export unit prices. This is a result of the fact that Turkey imports construction plastics with higher added-value while exports construction plastics with lower added-value.

Plastics Construction Materials Average Unit Foreign Trade Prices (USD / KG)



The average unit import price realised as 6,15 USD / KG in the first half of 2015, declining with % 9,4 compared to peers period of 2014. On the other hand average unit export price decreased to 2,43 USD / KG decreasing with % 5,9 in the same period.

Average Unit Import Prices (USD / KG)

HS No	Products Name	2014	2014 / 6	2015 / 6	% Increase 2015/2014 (6)
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	5,21	5,73	4,26	-25,6
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	9,18	9,73	8,15	-16,3
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	2,49	2,67	2,37	-11,1
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	8,82	10,99	10,16	-7,6
3925	CONSTRUCTION MATERIALS FROM PLASTIC	5,95	5,89	5,48	-6,9
	TOTAL Construction Materials	6,04	6,79	6,15	-9,4

Average Unit Export Prices

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(USD / KG)

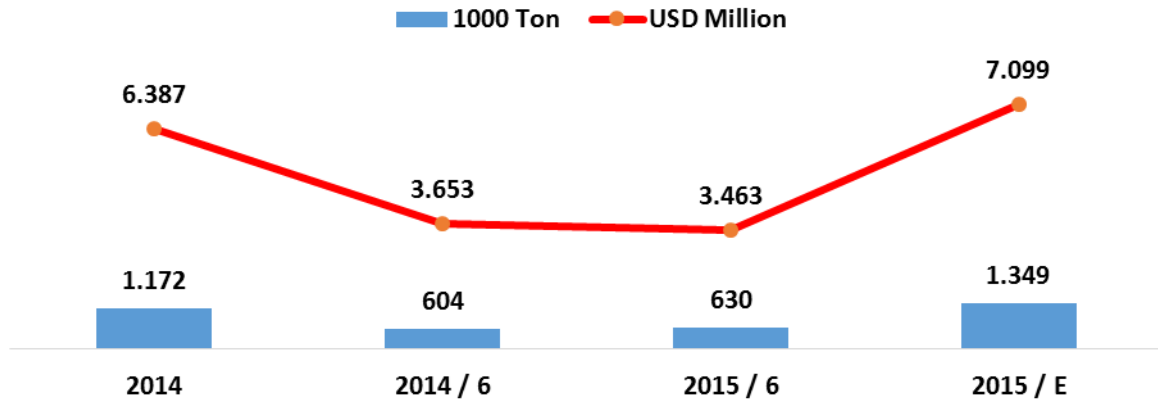
HS No	Products Name	2014	2014 / 6	2015 / 6	% Increase 2015/2014 (6)
3916	MONOFILAMENT, BAR, PROFILES FROM PLASTIC-CROSS SECTION OVER 1MM	2,09	2,05	1,97	-4,3
3917	TUBES, PIPES, HOSES FROM PLASTIC; GASKET, ELBOW, UNION ETC	2,63	2,63	2,44	-7,2
3918	FLOOR COVERINGS FROM PLASTIC – INCL. WALL AND CEILING COVERINGS	2,31	2,35	1,97	-15,9
3922	BATHTUB, SHOWER, SINK, BIDET, WATER-CLOSET PAN AND HARDWARE FROM PLASTIC	4,99	4,95	4,56	-8,0
3925	CONSTRUCTION MATERIALS FROM PLASTIC	2,82	2,77	2,61	-5,8
	TOTAL Construction Materials	2,59	2,58	2,43	-5,9

DOMESTIC CONSUMPTION OF CONSTRUCTION PLASTICS:

Domestic consumption of plastics construction materials realised as 676 thousand tons and USD billion of 3,5 in the first half of 2015 increasing by 11,8 % in unit base and decreasing by % 3,4 in value base, compared to the peers period of 2014.

Total domestic consumption is expected to be 1,4 million tons and USD billion of 7,1 at the end of 2015, increasing by % 15 in unit and % 11 in value base, compare to 2014.

Plastics Construction Materials Domestic Consumption



SUPPLY AND DEMAND EQUILIBRIUM IN CONSTRUCTION PLASTICS IN THE FIRST HALF OF 2015:

In the first half of 2015 compare to the peers period of 2014, in plastics construction materials **in unit base** ;

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- ✓ Production increased by % 1,4
- ✓ Imports declined by % 7,9,
- ✓ Exports decreased by % 15,5
- ✓ Domestic consumption increased by % 11,8
- ✓ Foreign trade surplus decreased by % 18.

Supply and Demand Equilibrium in Plastics Construction Materials (1000 Ton)

	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
<i>Production</i>	1.809	932	945	1.890	1,4	4,5
<i>Import</i>	67	32	34	68	7,9	2,3
<i>Export</i>	704	359	304	607	-15,5	-13,8
<i>Domestic Consumption</i>	1.172	604	676	1.351	11,8	15,3
<i>Foreign Trade Deficit / Surplus</i>	637	328	269	539	-17,8	-15,4
<i>Export / Production (%)</i>	39	39	32	32		
<i>Import / Domestic Consumption (%)</i>	6	5	5	5		
<i>Export / Import (%)</i>	1.052	1.133	887	887		

On the other hand, in the same period and in value base ;

- ✓ Production decreased by % 7,1
- ✓ Imports declined by % 2,2
- ✓ Exports decreased by % 20,4
- ✓ Domestic consumption decreased by % 3,4
- ✓ Foreign trade surplus decreased by % 26.

Supply and Demand Equilibrium in Plastics Construction Materials (USD Million)

	2014	2014 / 6	2015 / 6	2015/ E	% Increase 2015/2014 (6)	% Increase 2015/2014
<i>Production</i>	7.808	4.364	4.054	8.106	-7,1	3,8
<i>Import</i>	404	215	211	421	-2,2	4,2
<i>Export</i>	1.825	926	737	1.473	-20,4	-19,3
<i>Domestic Consumption</i>	6.387	3.653	3.528	7.055	-3,4	10,5
<i>Foreign Trade Deficit / Surplus</i>	1.421	710	526	1.052	-26,0	-26,0
<i>Export / Production (%)</i>	23	21	18	18		
<i>Import / Domestic Consumption (%)</i>	6	6	6	6		
<i>Export / Import (%)</i>	452	430	350	350		

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2015 EXPECTATIONS :

Considering the realization of the first 6 months of 2015, It is estimated for the end of 2015 that ;

- ✓ Production will reach to 1,9 million tones and USD billion of 8,1 by increasing % 4,5 in unit base and % 3,8 in value base,
- ✓ Imports will reach to 68 thousand tons and USD million of 421 by increasing % 2,3 in unit base and % increasing by % 3,8 in value base,
- ✓ Exports will reach to 1,4 million tons and USD billion of 1,73 decreasing by % 14 in unit base and decreasing by % 19 in value base,
- ✓ Domestic consumption will be 1,4 million tones and USD billion of 7,1 by increasing % 15 in unit base and % 11 in value base,
- ✓ In 2015 the industry will give 539 thousand tone and USD billion of 1,1 foreign trade surplus,
- ✓ % 32 of production in unit base and % 18 of it in value base will be exported,
- ✓ % 5 of domestic consumption in unit base and % 6 of it in value base will be met by imports.

2015 Expectation for Turkish Plastics Construction Materials Industry

	1000 Ton			USD Million		
	2014	2015/ E	% Increase 2015/2014	2014	2015/ E	% Increase 2015/2014
<i>Production</i>	1.809	1.890	4,5	7.808	8.106	3,8
<i>Import</i>	67	68	2,3	404	421	4,2
<i>Export</i>	704	607	-13,8	1.825	1.473	-19,3
<i>Domestic Consumption</i>	1.172	1.351	15,3	6.387	7.055	10,5
<i>Foreign Trade Deficit / Surplus</i>	637	539	-15,4	1.421	1.052	-26
<i>Export / Production (%)</i>	39	32		23	18	
<i>Import / Domestic Consumption (%)</i>	6	5		6	6	



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