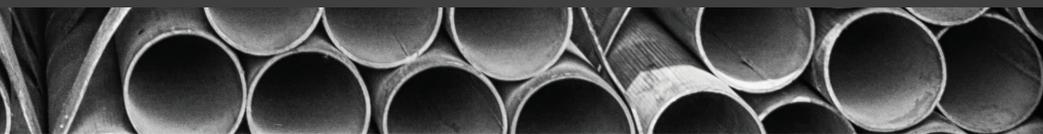




PAGEV

**TURKISH PLASTICS CONSTRUCTION MATERIALS INDUSTRY
FOLLOW-UP REPORT
2017**



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— PREFACE —

The plastic industry is one of the most important actors of the Turkish economy. Today, the contribution of the plastics industry to the country's economy is gradually increasing with the total production exceeding 9 million tons, and 35 billion dollars worth of turnover, the approaching direct exports of 5 billion dollars and the annual growth of 12% for the last 10 years.

Our industry, with its production capacity, has reached the second place in Europe and the sixth place in the world. As PAGEV, we continue to lead the industry successfully in the framework of the "Connecting Power" mission of the Turkish Plastics Industry.

We also know that having the right and reliable data and information is the most important part of the solution when we sign the indispensability of Plastics in our lives and sign our work to tackle our industrial problems with concrete steps based on scientific evidence. In this direction we constantly investigate, collect new data, compile and report them. We present our reports that we believe are important for the development of our industry and our booklets containing important information to the plastics industry representatives, stakeholders and public institutions.

As PAGEV, we prepared a report set that will contribute to the industry in a serious way in the face of our long and dedicated researches. With our reports, we made booklets with the comments of our expert reporters about the point where the Turkish Plastics Industry is in the right and reliable light, common problems and what should be the search for concrete solutions. We believe that our reports and information set will benefit all of our stakeholders, especially our members, and will guide the plastics world. At the same time, we are pleased that our public institutions have reached the most up-to-date and accurate information about the plastics industry.

On the other hand, with our sector reports in English, we think that our colleagues will be able to share the potential of our country's plastics industry with the most up-to-date business partners in the global marketplace.

Hereby, presenting our current reports and information files relating with our industry, we would like to thank all of our colleagues who have contributed to this day's achievement of our industry, who has taken a position as a locomotive mission in the development of our country.

**Best regards,
Yavuz EROĞLU
PAGEV President**

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- EXECUTIVE SUMMARY -

The share of the construction sector which is the driving force of economic activity in global and Turkish economy in recent years realized as 10-12%. The share of construction industry in GDP in Turkey is below the world average of 5.5%. The growth rates of construction industry in developing countries is relatively higher than in the developed countries. In this context, the share of construction industry in 2025, is estimated as 16-17% in developing countries and 10% in developed countries.

The urban transformation work, including 10 million won and residential construction industry plays an important role in the construction industry. On the other hand, the changes in early 2013 and the changes in value added tax rate application is also making a positive impact on the growth of the construction sector. Urban transformation has brought vitality to all sub-sectors of the construction industry.

The growth of plastic construction material in the first half of 2017 based mainly on the increase in domestic sales despite the decline in exports. In the plastics construction materials by the end of 2017 compare to 2016, on amount base it is expected that production to increase by 6%, imports to decline by 4%, exports to decreased by 1%, domestic consumption to increase by 8%, foreign trade surplus to say almost the same level. In the same period, 24% of production will be exported, 4% of domestic sales will be met by imports. Export coverage of imports is expected to be 656%.

The production of plastics construction materials by the end of 2016 is expected that to increase by 7.1%, imports by 7.9%, exports to decrease by 16%, domestic consumption to increase by 17 %. In the same period, 24% of production will be exported, 5% of domestic sales will be met by imports. Export coverage of imports is expected to be 660% on amount base.

1. HS CODES OF PLASTICS CONSTRUCTION MATERIALS

The plastics construction materials are described in the HS numbers of 3916, 3917, 3918, 3922 and 3925 are

taken into account in this report.

HS CODE	Product Description
3916	Monofilament, bar, profiles from plastic-cross section over 1mm
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.
3918	Floor coverings from plastic – incl. wall and ceiling coverings
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic
3925	Construction materials from plastic

Table 1: HS Codes of Plastics Construction Materials

Source: TurkStat & ITC Trade Statistics

2. COMPANIES OPERATING IN PLASTICS CONSTRUCTION MATERIALS INDUSTRY

There are 697 companies operating in the plastic construction materials industry 84% of which are operating in 9 provinces. The companies operating in

Istanbul, İzmir and Ankara make up the 63% of total number of companies in the industry.

Province	Number	% Share
İstanbul	301	43.8
İzmir	71	10.3
Ankara	65	9.5
Konya	38	5.5
Kocaeli	27	3.9
Bursa	23	3.3
Adana	22	3.2
Antalya	21	3.1
Kayseri	14	2.0
Mersin	13	1.9
Gaziantep	12	1.7
Samsun	12	1.7
12 Province Total	619	90.1
Others	68	9.9
Total	687	100.0

Table 2: Plastics Construction Materials Companies by Provinces

Source : PAGEV Data Base

2. COMPANIES OPERATING IN PLASTICS CONSTRUCTION MATERIALS INDUSTRY

The companies operating in construction plastics industry, produce more than 60 kinds of products. The main products which the manufacturers are focusing

on are profiles, fresh water pipes, waste pipes, pipe connection elements, window systems, bathroom and kitchen sinks and hoses.

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 molding	1
Hose	52	Gutter and accessories	6	Foam Insulation Tape	1
Water and liquid containers	47	Insect screen	6	Mortar Board	1
gvlInsulation 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
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 mound	1
Skirting	9	Fiber materials	1		
Plates	8	Curtain ring	1		

Table 3: Number of Manufacturing Companies in Construction Plastics Materials Industry by Products

Source: PAGEV Data Bank

3. PRODUCTION

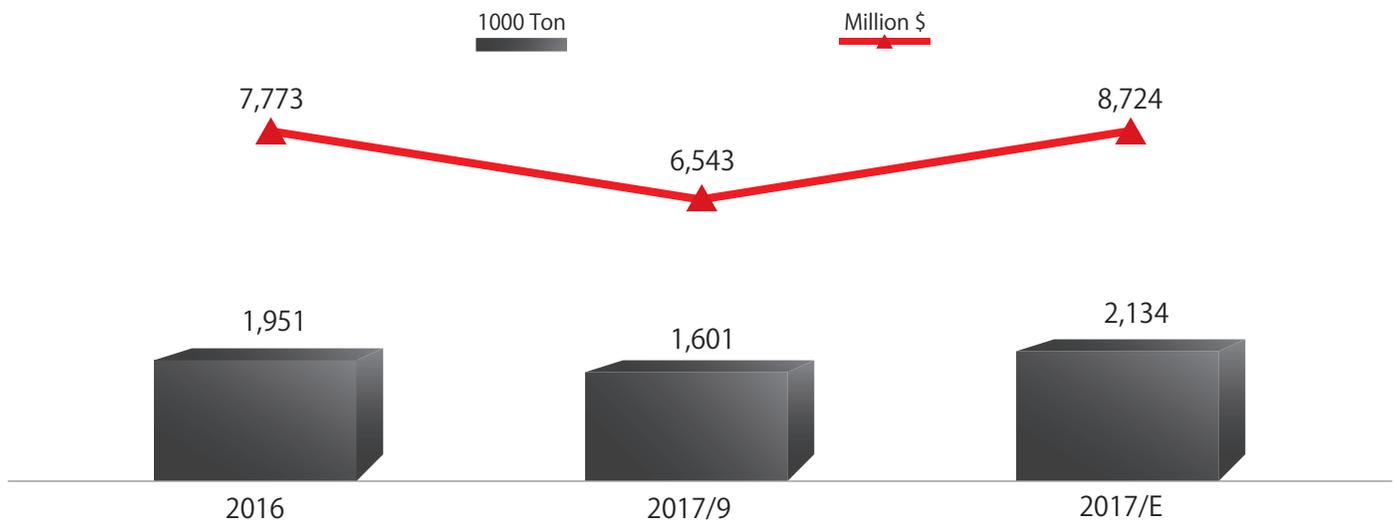
The annual average increase of plastics construction materials production has realized as 4% on amount and value basis within 2012-2016 period. The Production realized as 1 million 601 thousand tons and 6,54 billion dollars in the January–September period of

2017 and expected to increase to 2 million 134 thousand tons and 8.7 billion dollars by the end of the year, increasing by 9% on amount and 12% on value base with respect to 2016.

	2016	2017/9	2017/E	% Increase 2017/2016 (E)
1000 Ton	1,951	1,601	2,134	9
USD Million	7,773	6,543	8,724	12

Table 4: Plastics Construction Materials Production

Source: TurkStat & ITC Trade Statistics



Graphic 1: Plastics Construction Materials Production

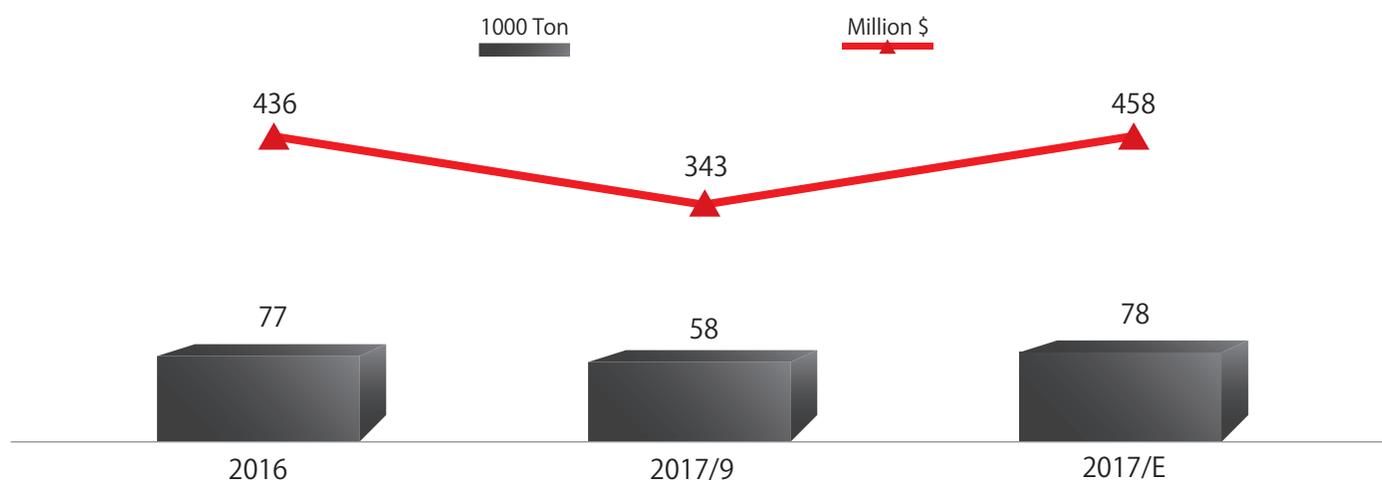
Source: TurkStat & ITC Trade Statistics

4. FOREIGN TRADE

4.1. IMPORTS

Imports of plastics construction materials realized as 58 thousand tons and 343 million dollars in the January - September period of 2017, are expected to increase to

78 thousand tons and 458 million dollars by the end of the year, increasing by 1% on amount and increasing by 5% on value basis.



Graphic 2: Plastics Construction Materials Imports

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	2017/E	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	14	9	12	-9
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	26	21	27	5
3918	Floor coverings from plastic – incl. wall and ceiling coverings	22	19	25	11
3922	Bathub, shower, sink, bidet, water-closet pan and hardware from plastic	4	3	5	2
3925	Construction materials from plastic	10	6	9	-17
	Total construction materials	77	58	78	1

Table 5: Plastics Construction Materials Imports (1000 Ton)

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	2017/E	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	57	42	56	-2
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	209	173	231	10
3918	Floor coverings from plastic – incl. wall and ceiling coverings	89	67	90	2
3922	Bathub, shower, sink, bidet, water-closet pan and hardware from plastic	42	33	44	6
3925	Construction materials from plastic	39	28	37	-5
	Total construction materials	436	343	458	5

Table 6: Plastics Construction Materials Imports (USD Million)

Source: TurkStat & ITC Trade Statistics

4. FOREIGN TRADE

4.2. IMPORTS BY COUNTRIES

Turkey imports construction plastics from almost 70 countries. 10 countries shared 75% on amount and 73% of total imports on amount and 76% on value basis in the January - September period of 2017.

Germany, China, France, Italy and the Czech Republic are the major import partners of Turkey in the construction plastics imports in this period.

Countries	1000 Ton	Million \$	Ton -%	\$ -%
Germany	11	75	19	22
China	11	49	19	14
France	5	42	9	12
Italy	4	25	6	7
Czech Rep.	1	15	2	4
USA	1	14	2	4
Poland	3	12	6	3
UK	1	11	2	3
S. Korea	3	10	5	3
Sweedden	2	9	4	2
10 Countries Total	43	261	73	76
Others	16	83	27	24
Total	58	343	100	100

Table 7: Plastics Construction Materials Imports by Countries (2017/9)

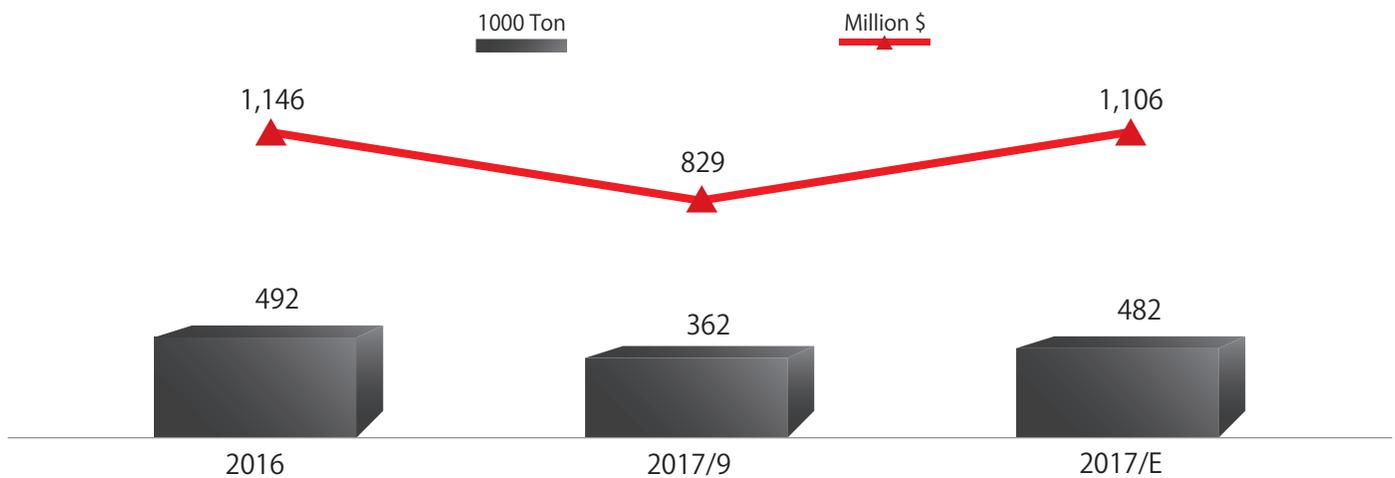
Source: TurkStat

4. FOREIGN TRADE

4.3. EXPORTS

Exports of plastics construction materials realized as 362 thousand tons and 829 million dollars in the January - September period of 2017 and expected to be as

482 thousand tons and 1 billion 106 million dollars by the end of the year, decreasing by 16% on amount, 4% on value basis with respect to 2016.



Graphic 3: Plastics Construction Materials Exports

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	2017/E	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	146	113	151	3
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	215	158	211	-2
3918	Floor coverings from plastic – incl. wall and ceiling coverings	13	9	12	-8
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic	24	19	25	5
3925	Construction materials from plastic	94	62	83	-12
	Total construction materials	492	362	482	-16

Table 8: Plastics Construction Materials Exports (1000 Ton)

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	2017/E	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	250	188	251	0
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	553	389	519	-6
3918	Floor coverings from plastic – inc wall and ceiling coverings	26	19	25	-2
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic	100	76	102	2
3925	Construction materials from plastic	217	157	209	-4
	Total construction materials	1,146	829	1,106	-4

Table 9: Plastics Construction Materials Exports (1000 Ton)

Source: TurkStat & ITC Trade Statistics

4. FOREIGN TRADE

4.4. EXPORTS BY COUNTRIES

Turkey exports construction plastics to more than 150 countries. Iraq, Algeria, Georgia, Germany and Romania are the 5 major export partners of Turkey in the construction plastics exports realised in the

January - September period of 2017. The first 10 export partners shared 53% on amount and 49% on value basis of total plastic construction materials exports.

	1000 Ton	USD Million	% Share 1000 Ton	% Share USD Million
Iraq	76	138	21	17
Algeria	23	46	6	6
Georgia	22	41	6	5
Germany	9	34	3	4
Romania	15	32	4	4
Bulgaria	8	31	2	4
France	8	24	2	3
Libya	12	23	3	3
Azerbaijan	11	22	3	3
Iran	9	19	3	2
10 Countries Total	193	409	53	49
Others	169	420	47	51
Total	362	829	100	100

Table 10: Plastics Construction Materials Exports by Countries (2017/9)

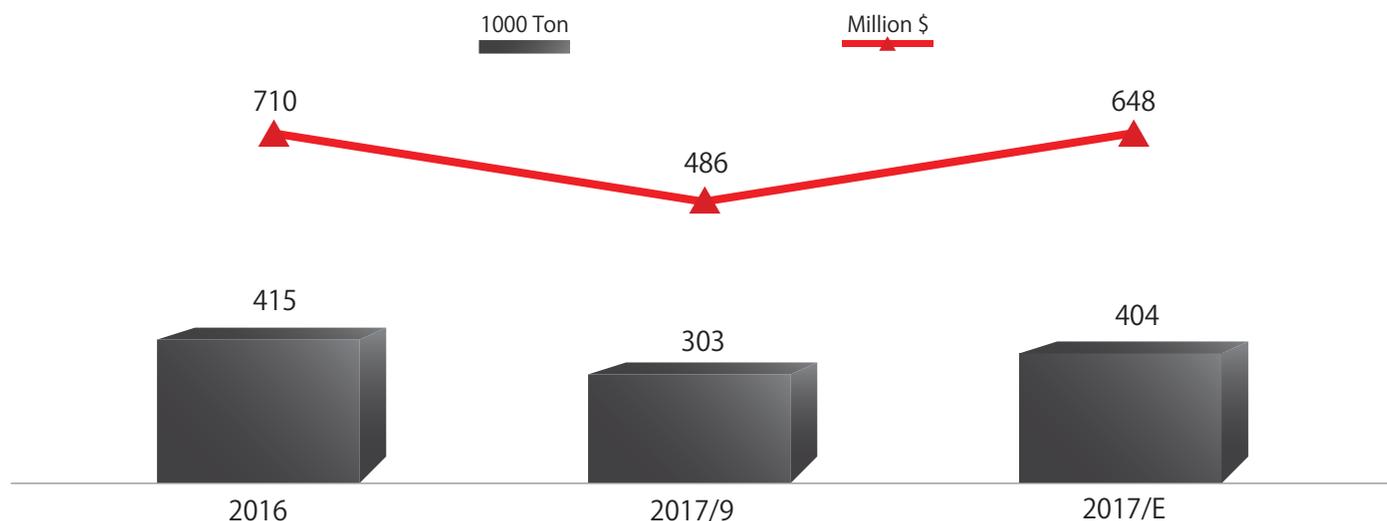
Source: TurkStat & ITC Trade Statistics

4.5. FOREIGN TRADE SURPLUS

Turkey is a net exporter in foreign trade of construction plastics. Foreign trade surplus which was 303 thousand tons and 486 million dollars in the January - September period of 2017 is expected to be 404 thousand tons and

648 million dollars by the end of the year, increasing by 3% on amount and decreasing by 9% on value basis with respect to 2016.

4. FOREIGN TRADE



Graphic 4: Plastics Construction Materials Foreign Trade Surplus

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	2017/E	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	132	104	138	5
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	189	137	183	-3
3918	Floor coverings from plastic – incl. wall and ceiling coverings	-9	-9	-13	38
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic	20	15	21	5
3925	Construction materials from plastic	84	56	74	-11
	Total construction materials	415	303	404	-3

Table 11: Plastics Construction Materials Foreign Trade Surplus (1000 Ton)

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	2017/E	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	194	146	195	1
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	343	216	288	-16
3918	Floor coverings from plastic – incl. wall and ceiling coverings	-63	-49	-65	3
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic	58	43	58	-1
3925	Construction materials from plastic	178	129	172	-3
	Total construction materials	710	486	648	-9

Table 12: Plastics Construction Materials Foreign Trade Surplus (Million \$)

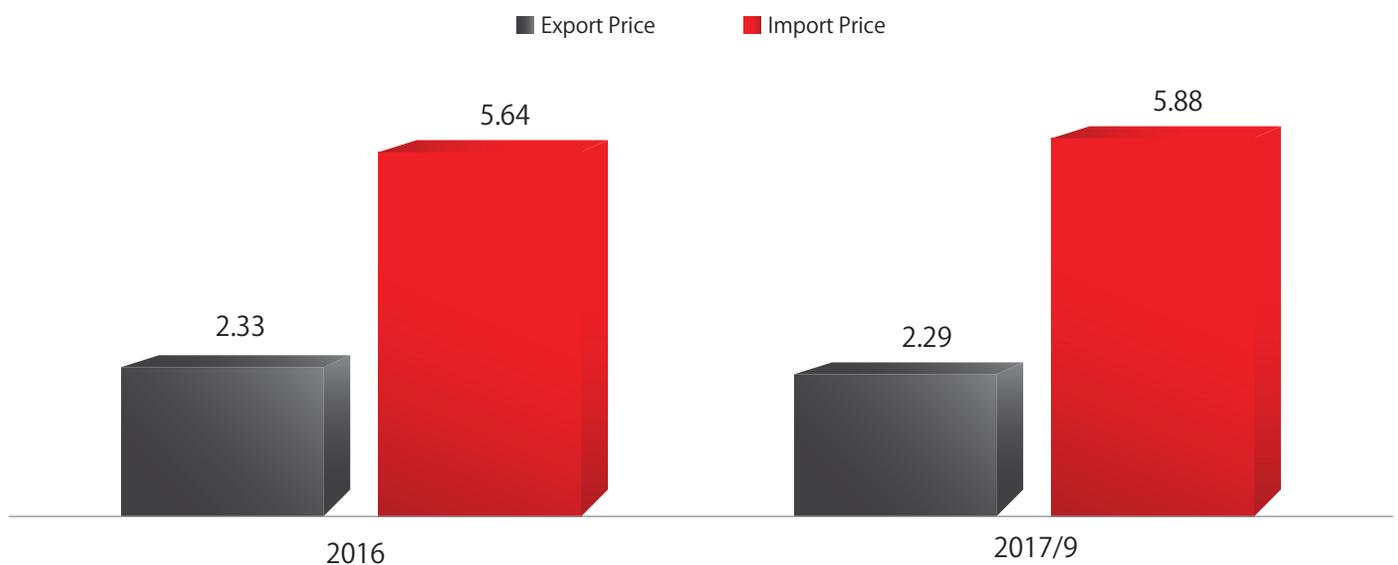
Source: TurkStat & ITC Trade Statistics

4. FOREIGN TRADE

4.6. IMPORT AND EXPORT PRICES

The average unit import price realized as 5.88 \$/kg in the January - September period of 2017, increasing by 4.2% compared to 2016. On the other hand average unit export price decreased to 2.29 \$/kg decreasing by 1% in the same period.

Even though Turkey has foreign trade surplus in construction plastics, import unit prices are more than 2.5 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.



Graphic 5: Plastics Construction Materials Average Foreign Trade Prices

Source: TurkStat & ITC Trade Statistics

HS Code	Products Name	2016	2017/9	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	4.13	4.47	8.2
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	7.97	8.41	5.5
3918	Floor coverings from plastic – incl. wall and ceiling coverings	3.97	3.63	-8.5
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic	9.26	9.63	4.0
3925	Construction materials from plastic	3.78	4.32	14.2
	Total construction materials	5.64	5.88	4.2

Table 13: Plastics Construction Materials Average Import Prices (\$/kg)

Source: TurkStat & ITC Trade Statistics

4. FOREIGN TRADE

HS Code	Products Name	2016	2017/9	% Increase 2017/2016
3916	Monofilament, bar, profiles from plastic-cross section over 1mm	1.72	1.66	-3
3917	Tubes, pipes, hoses from plastic; gasket, elbow, union etc.	2.57	2.46	-4
3918	Floor coverings from plastic – inc. wall and ceiling coverings	1.94	2.07	7
3922	Bathtub, shower, sink, bidet, water-closet pan and hardware from plastic	4.16	4.04	-3
3925	Construction materials from plastic	2.30	2.52	9
	Total construction materials	2.33	2.29	-1

Table 14: Plastics Construction Materials Average Export Prices (\$/kg)

Source: TurkStat & ITC Trade Statistics

5. DOMESTIC CONSUMPTION

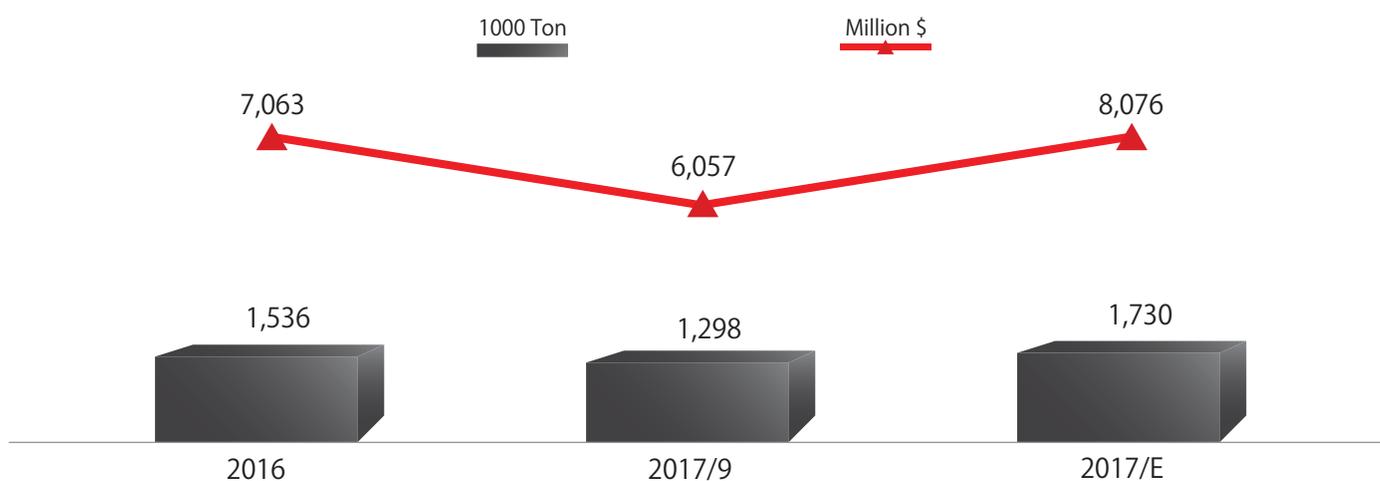
Domestic consumption of plastics construction materials realized as 1 million 298 thousand tons and 6.06 billion dollars in the January - September period of 2017 and expected to increase to 1.75 million tons and

8.08 billion dollars by the end of the year, increasing by 13% on amount and 14% on value basis compared with 2016.

	2016	2017/9	2017/E	% Increase 2017/2016 (E)
1000 Ton	1,536	1,298	1,730	13
USD Million	7,063	6,057	8,076	14

Table 15: Plastics Construction Materials Domestic Consumption

Source: TurkStat & ITC Trade Statistics



Graphic 6: Plastics Construction Materials Domestic Consumption

Source: TurkStat & ITC Trade Statistics

6. 2017 EXPECTATIONS

The growth of plastic construction material in the January - September period of 2017 based mainly on the increase in domestic sales despite the decline in exports.

In the plastics construction materials, by the end of 2017 compare to 2016, on amount base it is expected that;

- Production to increase by 9%, domestic consumption increase by 13%, imports to increase by 1%.
- Exports to decreased by 2% and foreign trade surplus to decline by 3%.

In the same period, 23% of production will be exported, 5% of domestic sales will be met by imports and export coverage of imports is expected to be 619%.

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

- Production to increase by 12%, imports to increase 5% and domestic consumption to increase by 14% .
- Exports to decrease by 4% and foreign trade surplus decrease 9%.

In the same period, 13% of production will be exported, 6% of domestic sales will be met by imports. Export coverage of imports is expected to be 241%.

	1000 Ton				1000 Million			
	2016	2017/9	2017/E	% Increase (E) (2017/2016)	2016	2017/9	2017/E	% Increase (E) (2017/2016)
Production	1,951	1,601	2,134	9	7,773	6,543	8,724	12
Imports	77	58	78	1	436	343	458	5
Exports	492	362	482	-2	1,146	829	1,106	-4
Domestic Consumption	1,536	1,298	1,730	13	7,063	6,057	8,076	14
Foreign Trade Deficit/Surplus	415	303	404	-3	710	486	648	-9
Exports / Production (%)	25	23	23		15	13	13	
Imports/Domestic Consumption (%)	5	5	5		6	6	6	
Exports / Imports (%)	638	619	619		263	241	241	

Table 16: Supply and Demand Equilibrium

Source: TurkStat & ITC Trade Statistics

7. CONCLUSION

The construction activity in Turkey is undergoing a transformation due to changing lifestyles and evolving needs. Intelligent building systems in line with new trends occurring in the industry in recent years, environmental structures, modern living spaces with entertainment systems and home-office activity centers became an indispensable part of the modern projects. The importance of urban regeneration in the housing market increased while commercial non-residential building construction field studies focused on social needs are concerned. Foreign country with a publicly funded major infrastructure transformation projects and jobs also has a significant share in the volume of the business industry. Foreign direct investments in the industry, especially in big cities is increasing.

The housing production which accounts for approximately 60% of total production of the construction industry is increasing rapidly in domestic market of Turkey. The building construction sub-sector in recent years seems to be the engine of growth in Turkey's construction activity. 2017 Mid-Term Prospects and Future Trends in the Guidance to the Construction Sector can be summarized as follows:

- Macroeconomic and political environment
- Financing conditions
- Legal regulations
- Urban transformation
- Mega projects
- Demographic structure in the internal market
- Rapid urbanization and increased domestic level.

8. PAGEV PROJECTS

PAGEV which is the "Unifying Power" of the Turkish Plastics Industry develops different projects aiming to solve the problems outlined above. These are in summary: "PAGEV Plastics Center of Excellence" and "International Regional Plastics Production Center".

8.1. PAGEV PLASTICS CENTER OF EXCELLENCE

Plastic materials, used in all areas of life, are rapidly taking place of other alternative products, because of their superior properties. In Turkey as well as in all over the world, plastics which useage in all sectors increasing is becoming an indispensable material for the 21st century.

Turkish Plastics Industry which is one of the fastest growing sectors in our country despite being young, is the 6th in the world and the 2nd in Europe. Growing with the goal of leadership in Europe, the Turkish Plastics Sector aims to increase the certification and added value of its products.

PAGEV, "Unifying Power" of the Turkish Plastics Industry, is leading the industry with the "PAGEV Plastics Center of Excellence" for realizing this purpose. The mission of the PAGEV Center for Plastics Excellence will include the following activities,

- Research and Development
- Test and Laboratory Services
- Certification
- Training
- Competent Consulting

With the Center of Excellence, the test and laboratory support that the plastic industry needs will be provided to the industry. So, many problems that lead to loss of time and energy such as high test costs, overseas shipping, customs clearance, long test times will be removed.

The platforms that will provide information to and knowledge sharing in the industry will be developed by the Center and detailed training programs will be prepared and presented for the benefit of the industry. While working on the newest technologies, the Center of Excellence will work together with industry organizations, universities, research institutes, professional associations and non-governmental organizations to work for the Turkish Plastics Industry to be the world leader with R&D and innovation based work.

Established with the support of the Ministry of Science, Industry and Technology, PAGEV Plastics Center of Excellence will provide to the plastics industry and Turkish economy, especially the development of industrial skills and capabilities that will form the basis of Turkey's national projects.

By PAGEV Plastics Center of Excellence, which will be established by strategic cooperation, it is aimed to grow the plastic industry faster with its traceable targets, scientific quality and high potential for commercialization.

Upon completion, the Center of Excellence, which will have an area of over 30 thousand m², rises right beside PAGEV Vocational and Technical Anatolian High School in Küçükçekmece, Istanbul. PAGEV Plastics Center of Excellence, which will make Turkey the center of plastic production in the world, will carry out innovative projects.

In addition to this, the Center will create a control mechanism for the products exported abroad. The Center will also contribute to the preservation of the reliability and reputation of the plastic products produced in Turkey. On the other hand, the introduction of poor quality and non-standard goods into the country will be prevented by determining the technical suitability of the plastic products imported from abroad without any definite importation in the laboratories.

With its superior information infrastructure, the Center of Excellence will present the important documents required by the players of the sector more economically and quickly.

By accelerating the development, we will focus on the development of products and production technologies that will increase the competitive power of our firms.

The Center of Excellence, which will develop innovative ideas by following the developments in the world plastic sector, will increase the competitive power of our firms by providing many field consultancy services from the determination of appropriate input materials to the optimization of production process.

8. PAGEV PROJECTS

8.2. INTERNATIONAL REGIONAL PLASTIC MANUFACTURING CENTER

Although the Turkish Plastics Sector, with its process capacity reaching 9 million tons, has the 6th largest plastics production capacity in the world and 2nd in Europe, imports more than 85% of the plastic raw material it needs.

One of the most important advantages of the plastics industry in Turkey is that it is located between the Middle East countries which are the main petroleum and plastic raw material producer and the European market which is the main plastic consumer.

PAGEV aims to unify the plastic raw materials potential of Middle East countries with the Turkish Plastics Industry's competent production capability and experience at the international regional plastic production center, which Turkey aims to establish in South East Anatolia Region.

In the center, to be established with the win-win principle, the plastics raw materials producer countries will be supplying cheap and reliable raw materials having a large volume and reliable market while Turkish Plastics Industry will have greater competition possibilities in the global markets with its growing production capacity and falling costs.

CONNECTING POWER OF PLASTICS INDUSTRY



PAGEV

PAGEV is member of;

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