



TURKISH PLASTICS INDUSTRY COVID-19 PANDEMIC OBSERVATIONS AS OF SECOND HALF OF APRIL 2020

**(THIS INFORMATION WAS COMPILED
USING REDUCTION IN COMPANY DEMAND
AND OTHER MARKET OBSERVATIONS)**

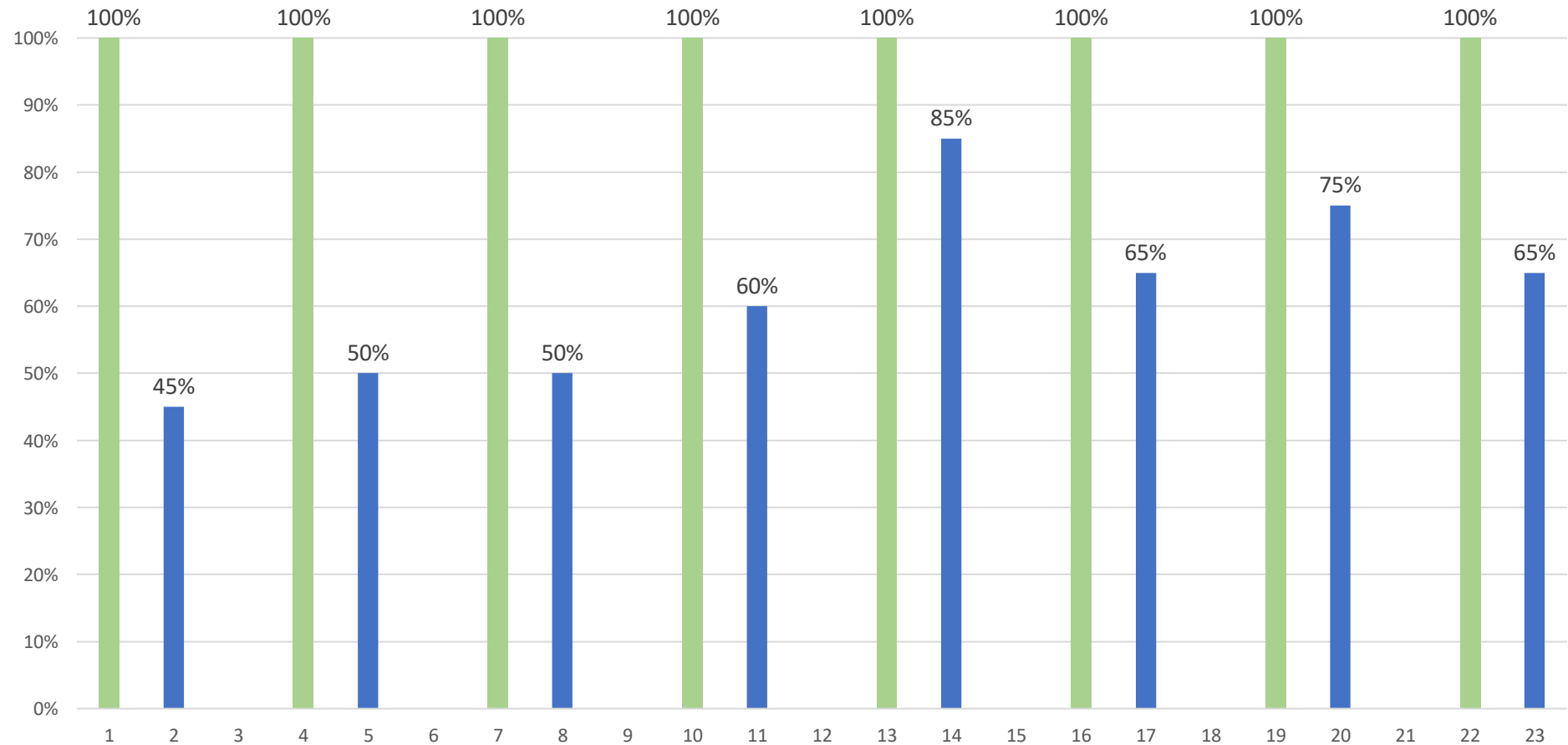
*** THE DECLINE IN PETROLEUM PRICES BROUGHT A REDUCTION IN RAW MATERIAL PRICES.**

**PIPE - WHITE GOODS - CABLE - AUTOMOTIVE - RAFFIA -
ROTATION - INFLATION AND MACHINERY INDUSTRIES**

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| PIPE | | <p>ALTHOUGH THE PIPE INDUSTRY REMAINS ACTIVE <u>AS A LOCAL MARKET</u> DUE TO CONTINUATION OF GOVERNMENT CONTRACTS, THE PANDEMIC HAS AFFECTED OPERATIONS, AND THE SHRINKING OF THE CONSTRUCTION INDUSTRY CAUSED A REDUCTION IN THE DOMESTIC MARKET.</p> <p><u>EXPORTS</u> HAVE DECLINED DUE TO CUSTOMS DIFFICULTIES AND REDUCTION IN OPERATIONS IN THE MAIN MARKETS OF MIDDLE EAST AND CENTRAL ASIAN COUNTRIES. THE DECLINE IN PRODUCTION IN THE WHITE GOODS INDUSTRY IS AROUND 50 TO 60%.</p> |
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| WHITE GOODS | | <p>PRODUCTION HAS DECLINED BY 50% DUE TO NOT BEING PRIORITY PRODUCTS FOR CONSUMERS, AND THE SHRINKAGE HAS AFFECTED COMPONENT MANUFACTURERS SUCH AS INJECTION MOLDERS, SHEET/PLATE AND POLYURETHANE FOAM MAKERS.</p> |
| | | |
| CABLE | | <p>PRODUCTION IN THE CABLE SECTOR DECREASED BY ABOUT 50%, PARTICULARLY DUE TO SIGNIFICANT RECESSION IN IMPORTERS BASED IN THE UK, EUROPE'S TRADER OF CABLE, AND IN SALES TO TURKIC REPUBLICS AND THE AUTOMOTIVE AND CONSTRUCTION INDUSTRIES.</p> |
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| AUTOMOTIVE | | <p>ITS SHRINKING BY ABOUT 40% HAD SIMILAR REPERCUSSIONS ON INJECTION AND CABLE COMPANIES THAT PROVIDE SUPPLIES TO THE INDUSTRY.</p> |

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| RAFFIA | | THE LOCAL MARKET REMAINS IN FULL VOLUME, WHILE COMPANIES THAT WORK FOR THE EXPORT MARKET (FOR NON-FOOD BAGS, AWNINGS AND OTHER PRODUCTS) SUFFER PARTIAL RECESSION. |
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| ROTATION | | COMPANIES THAT MANUFACTURE WATER AND OTHER TANKS AND OUTDOOR PLAYGROUND EQUIPMENT HAVE SHRUNK BY 30 TO 40%. |
| | | |
| BLOW MOLDING | | THERE IS NO RECESSION IN COMPANIES THAT MANUFACTURE FOR THE FOOD AND CLEANING-HYGIENE INDUSTRIES; HOWEVER, COMPANIES THAT MANUFACTURE FOR OTHER INDUSTRIES (VARIOUS CHEMICALS, MOTOR OILS ETC.) HAVE SHRUNK BY ABOUT 25%. |
| MACHINERY | | THE MACHINERY INDUSTRY SHRUNK BY ABOUT 35% DUE TO RISING CURRENCY RATES AND POSTPONEMENT OF INVESTMENTS AS A RESULT OF ONGOING UNCERTAINTY. |

PIPE WHITE GOODS CABLE AUTOMOTIVE RAFFIA ROTATION BLOW MOLD MACHINERY

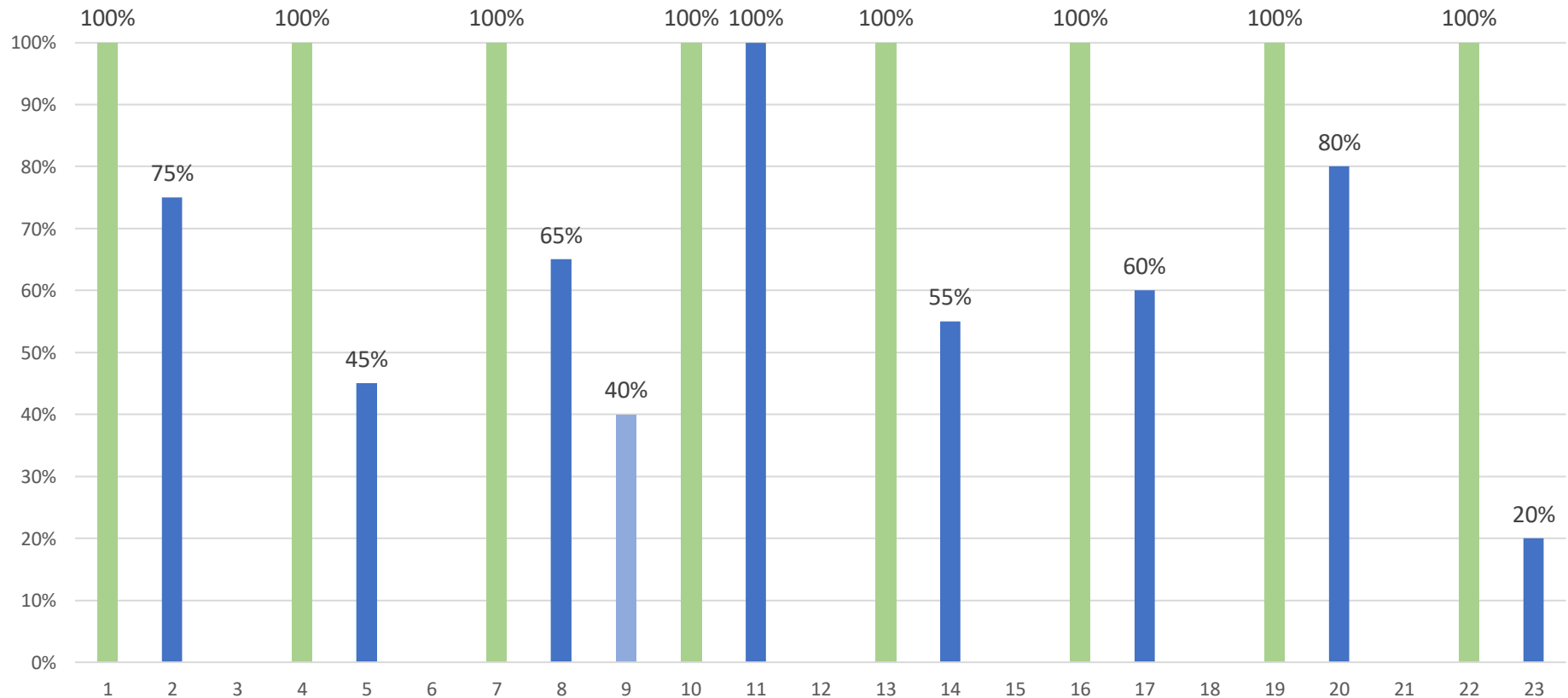


INJECTION

**MISCELLANEOUS - HOUSEHOLD APPLIANCES –
GARDENING - CRATES - BATHROOM PRODUCTS -
ELECTRIC/ELECTRONIC - TOYS AND COSMETICS**

| | | |
|-----------|---|--|
| INJECTION | MISCELLANEOUS | SEGMENTS THAT SERVE THE FOOD AND BEVERAGE INDUSTRIES, SUCH AS CLOSURES (FOREIGN MARKETS DEMAND 0.25 TO 1.5-LITER BOTTLE CAPS WHILE THE DOMESTIC MARKET PREFERS 5-10 LITER CAPS), AS WELL AS THOSE SERVING THE MEDICAL OR VITAL INDUSTRIES, WHILE INJECTION SEGMENTS THAT SERVE THE WHITE GOODS AND AUTOMOTIVE MARKETS HAVE SHRUNK BY 40 TO 50%.THE SHRINKING IN MISCELLANEOUS INJECTION IS ABOUT 25%. |
| | HOUSEHOLD APPLIANCES | PARALLEL TO WHITE GOODS, THIS INDUSTRY HAS BEEN AFFECTED BY ABOUT 55%. KITCHEN APPLIANCES IN PARTICULAR HAS SHRUNK BY 50% IN THE DOMESTIC MARKET AND 70% IN FOREIGN MARKETS. |
| | GARDEN EQUIPMENT (CHAIRS, TABLES ETC.) | CURRENTLY THE DECREASE IS AROUND 30 TO 40%, BUT CONSIDERING THAT PURCHASES OF THE TOURISM SECTOR, WHICH IS A LARGE BUYER, MAY BE POSTPONED, SHRINKING MAY REACH 60% IN THE MONTHS TO COME (THE DEMAND FOR DECK AND LOUNGE CHAIRS OR TABLES FROM TOURISTIC FACILITIES WILL NOT BE AS HIGH). |
| | CRATES | : ALMOST 100% OF MANUFACTURERS SERVE THE FOOD AND BEVERAGE INDUSTRIES, SO THERE IS NO IMPACT. |
| | BATHROOM PRODUCTS: | NEGATIVE IMPACT IS AROUND 40 TO 50%. |
| | ELECTRIC-ELECTRONIC | : NEGATIVE IMPACT IS AROUND 40%. |
| | TOYS | : DISRUPTIONS IN RETAIL CHANNELS LED TO AN NEGATIVE IMPACT OF AROUND 20%. COMPANIES WITH ONLINE SALES UNEFFECTED |
| | COSMETICS | : HAIR SALONS, WHOLESALERS, BEAUTY SALONS AND OTHER SERVICE LOCATIONS ARE CLOSED, LEADING TO A DECLINE OF ABOUT 80%. |

MISC. HOUSEHOLD APP GARDEN CRATES BATHROOM ELECTRONICS TOYS COSMETICS



FILM – TEXTILE – XPS - SHEET

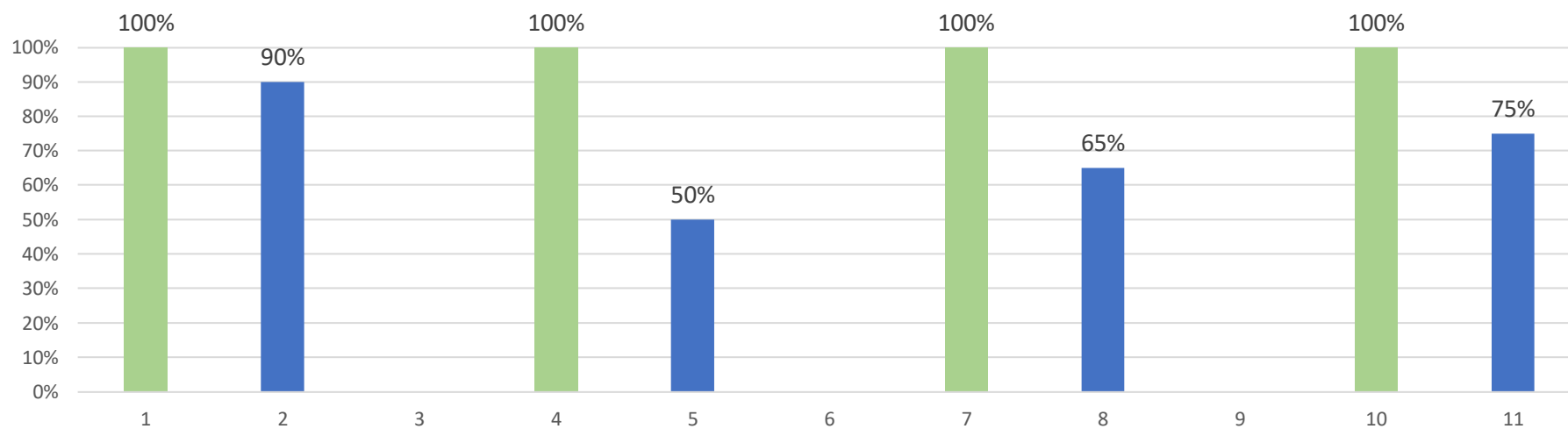
| | | |
|----------------|--|---|
| FILM | | BLOWN, CAST, BOPP, GREENHOUSE SHEETS, MEDICAL INDUSTRY |
| | | COMPANIES IN THE ABOVE SEGMENTS THAT ARE PREDOMINANTLY EXPORT-ORIENTED HAVE SEEN PARTIAL DECLINE, BUT THE REMAINDER SERVE THE FOOD, MEDICAL, HYGIENE AND VITAL INDUSTRIES, SO THERE ARE NO SIGNIFICANT ISSUES WITH CAPACITY USE. CURRENTLY, THE NEGATIVE IMPACT IS LIMITED TO 5 TO 10% MAXIMUM. |
| | | |
| TEXTILE | | SPUNBOND, YARN, FIBER |
| | | PP AND PA RUG INDUSTRIES HAVE LOST RETAIL SALES, EXPORTS OF CARPETS TO MIDDLE EAST AND TURKIC COUNTRIES, AND YARN AND CARPETS TO EUROPE HAVE DECLINED TOGETHER WITH SALES TO AUTOMOTIVE, HOME TEXTILE AND APPAREL INDUSTRIES SUCH AS PES-PA HAVE LED TO A RECESSION OF ABOUT 50 TO 60% IN THE YARN AND FIBER INDUSTRIES. SPUNBOND WAS ONLY PARTIALLY AFFECTED IN THE EXPORT SEGMENT. |
| | | |
| XPS | | FOOD : NO DECLINE IS REPORTED. |
| | | CONSTRUCTION : DECLINED BY AROUND 50%. |
| | | |
| SHEET | | BUILDING-CONSTRUCTION : SHEET MANUFACTURERS OTHER THAN XPS THAT SERVED THE CONSTRUCTION SECTOR DECLINED BY ABOUT 50% (PC SHEET, EXTERIOR PP - ENGINEERING POLYMERS AND OTHER SHEETS). |
| | | FOOD : PP, PS, PET AND OTHER SHEET OR THERMOFORM MANUFACTURERS THAT SERVE THE FOOD INDUSTRY HAVE NOT BEEN ADVERSELY AFFECTED. |

FILM

TEXTILE

XPS

SHEET



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