

# Exportwin

TRADING AND CONSULTING GROUP

Market Entry Solution

Your Passport To



You have a great service or product that  
you think **NEW MARKETS** is ready for?

How do you start and where do you begin?

Let us help you get off the ground

● BUSINESS SETUP    ● INVESTMENT    ● IMPORT

## Strategic Relationship Between Consultants and Business Owners;

### EXPORTWIN; Key Of Success

While there are many significant opportunities for foreign companies in Turkey, Iraq and Afghanistan, there are also challenges to entering these markets. Any market entry strategy for Turkey, Iraq and Afghanistan should begin with a thorough understanding of the costs and benefits to doing business in these markets. One of the essential expenditures will be visiting the market to establish relationships with partners in these countries. Investing in these relationships early and routinely will increase the likelihood of more successful business ventures. For many companies, representation in Turkey, Iraq or Afghanistan by a local agent, distributor, liaison office or partner will be key to their success. A local market entry consultant can provide knowledge of the local regulatory framework, language assistance, and valuable business contacts. As business develops, companies may open subsidiaries and make further local investments to expand their market share.

Exportwin offers numerous programs and services to assist foreign businesses in establishing a presence in these markets and developing appropriate contacts. Staffed with experienced Commercial Specialists with many years of industry and sector expertise, the Exportwin team can tailor your business approach to the right audience, and provide advice on your business strategy in Turkey, Iraq and Afghanistan.





WHO ARE WE ?



is an Istanbul-based full service consultant group established in 2008 and now it is one of the most experienced consultant companies in Turkey with several branches all around the world including Japan, Malaysia, Iraq and Afghanistan. Our services range from market research to company formations and business services, giving our clients the opportunity of having a unique local service partner in Turkey, Iraq and Afghanistan. Over the recent years, we have undertaken more than 100 projects in over 20 different practice areas.

Furthermore, with a strong determination beside counseling, executive and communication experiences and capabilities in Turkey, Iraq and Afghanistan, Exportwin attempts to develop commercial-economic cooperation between these markets and other countries. Conducting feasibility study and market entry research, Study and consulting for investing, B2B and B2C marketing services as well as trade supportive services are parts of our services for foreign business owners who want to have market shares in these countries.



## Supportive Service Model

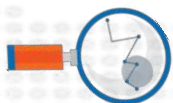
Exportwin Supportive Service Model, which includes a set of research, advisory, and executive activities, attempts to achieve its short and medium term goals by implementing the pre-requisites and strategies required by each of the businesses in the development of trade in Turkey, Iraq and Afghanistan. Exportwin Supportive Service Model, in line with the needs of many foreigner business owner that do not have the knowledge, capability and communication required in the field of market entry and exports to Turkey, Iraq and Afghanistan, should be designed, planned and implemented step-by-step as shown.



# HOW CAN WE ASSISST YOU ?



# Exportwin Services



Market Research



Marketing Services



Partnerships



Company Formations



Financial Services



Trade Logistic Services



Business Consulting



Market Entry Solution



Service	Tools	Advantages
<p><b>Market Analysis</b></p> <ul style="list-style-type: none"><li>❖ Market size and potential</li><li>❖ Sales &amp; distribution channels</li><li>❖ Market structure</li><li>❖ Competition analysis</li><li>❖ Client's market position</li><li>❖ Trends &amp; developments</li><li>❖ SWOT analysis</li><li>❖ Market entry and business development strategies</li></ul> <p><b>Benchmarking Studies</b></p> <ul style="list-style-type: none"><li>❖ Best practice in Turkey, Iraq and Afghanistan</li></ul>	<p>Methodology design according to the needs of the projects.</p> <p>Each research project is a unique combination of:</p> <ul style="list-style-type: none"><li>❖ Desk research</li><li>❖ Phone interviews</li><li>❖ Face-to-face in-depth interviews</li><li>❖ Online surveys</li><li>❖ Focus Groups</li></ul>	<ul style="list-style-type: none"><li>❖ Tailor made research; from answering a few questions up to a fully comprehensive market study with board presentations</li><li>❖ Creating a real team environment with our clients, enabling them to dynamically steer the research according to findings</li><li>❖ Highly flexible and responsive to any urgent demands from our clients' internal organization.</li></ul>

# Market Assessment Studies Service

## Base Your Export Strategy on Hard Facts

Entering a new export market can be a daunting one for many businesses. However, the correct careful planning can be the difference between export failure and export success. An overseas market entry can provide huge rewards to businesses wanting to grow their sales but it's not without its challenges.



- ✓ Market size and growth
- ✓ Competitors, prices & selling features
- ✓ Trade partners
- ✓ Shipping & Duty Costs
- ✓ Intellectual Property
- ✓ Restrictions

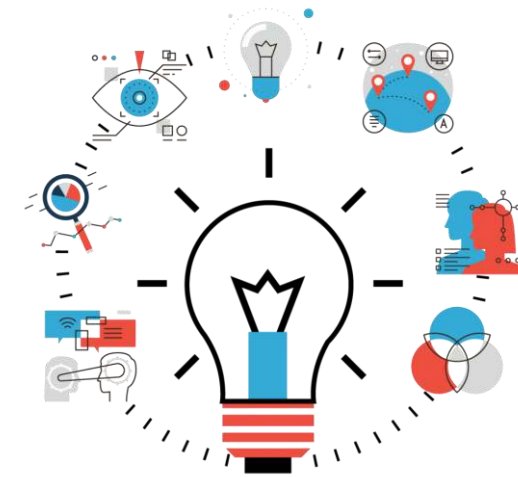
Using this information, you can then decide if the market is even feasible at all. If it isn't, keep moving forward to find one that is. If it is, then you can start developing a market entry strategy (more on these in a future post) Ultimately, a relatively small investment in an Exportwin market research study now, could save you considerable time, expense and heartache later on!

## Market Entry Research Service

Market-wise Strategies delivers market insights that help businesses to reach beyond their current markets, to understand and attract new customer groups and build new market segments. For the past 10 years, we have been helping clients to de-risk their market entry decisions into Turkey, Iraq and Afghanistan and shape their entry strategies in the Turkey, Iraq or Afghanistan .

Our sector specialist teams can help you to:

- ✓ Analyze market size and growth potential
- ✓ Clarify purchasing patterns and criteria
- ✓ Assess your competitors and their strategies
- ✓ Explore distribution channels
- ✓ Identify potential partners
- ✓ Investigate promotional opportunities
- ✓ Refine price points and pricing strategies
- ✓ Understand how purchase decision-makers and influence's view



Market-wise Strategies informs business, investment and marketing planning. We work across education and B2B markets.

## Marketing Services

Service	Tools	Advantages
<p>Meetings with potential customers</p> <ul style="list-style-type: none"><li>❖ Researching suitable, potential customers (B2B &amp; B2C)</li><li>❖ Arrangement of appointments</li><li>❖ Joint visits together with our clients to identify the market potential, interest and the general market conditions</li></ul>	<ul style="list-style-type: none"><li>❖ Standardized, optimized procedures using telephone and electronic communications</li><li>❖ Business meetings</li><li>❖ Trade-Show and events</li></ul>	<ul style="list-style-type: none"><li>❖ Combining potential customer searches with sales meeting appointment setting and direct market insight</li><li>❖ Effective services that give an initial impression of the potential market</li><li>❖ Support from a highly dedicated and communicative team</li><li>❖ Hassle free service, everything is pre-arranged, including airport transfers</li><li>❖ Client support and guidance during customer visits</li></ul>

To identify prospective buyers, sales agents or representatives, Exportwin will provide appropriate communication with potential customers or partners via various B2B or B2C marketing methods including:



Telemarketing



Business Meeting



Trade-show & Event



Commercial Reference Journal



Content Marketing



Email Marketing

We provide an affordable outsource B2B or B2C marketing services solution to your marketing needs in Turkey, Iraq and Afghanistan. We will provide turnkey services, or you can pick the marketing services you need and determine the extent of our collaboration. Flexibility, personal attention and common sense are the hallmarks of our client services.

## ▶▶ Partnerships

Service	Tools	Advantages
Distributor search and Supervision	<ul style="list-style-type: none"><li>❖ Partner research in complementary business fields</li><li>❖ Customer interviews to seek recommendations</li><li>❖ Face-to-face meetings with our client and candidates together</li><li>❖ Reference checks</li></ul>	<ul style="list-style-type: none"><li>❖ Systematic searches ensure the best candidates in Turkey, Iraq or Afghanistan are found</li><li>❖ Cultural guidance, we understand different business mentalities</li></ul>
Supplier search	<ul style="list-style-type: none"><li>❖ Systematic research</li><li>❖ Prequalification</li><li>❖ Price negotiation</li><li>❖ Reference checks</li></ul>	<ul style="list-style-type: none"><li>❖ Knowledge of the market and culture</li></ul>

## ▶▶ Company Formations

Service	Tools	Advantages
<p>Company Formations</p> <ul style="list-style-type: none"><li>❖ Limited Companies</li><li>❖ Branch Offices</li><li>❖ Liaison Offices</li><li>❖ Stock Companies</li></ul>	<ul style="list-style-type: none"><li>❖ Providing sample documents</li><li>❖ Complete handling of all formalities</li><li>❖ General commercial consulting for company formation</li></ul>	<ul style="list-style-type: none"><li>❖ Guaranteed professional handling of company formations</li><li>❖ Assurance of legal and financial compliance</li><li>❖ Experience of nearly 50 company formations</li></ul>

## Establishing Business and company formation

We will help you to form your company in Turkey, Iraq and Afghanistan;

Turkey's FDI Law is based on the principle of equal treatment, allowing international investors to have the same rights and liabilities as local investors. The conditions for setting up a business and share transfer are the same as those applied to local investors. International investors may establish any form of company set out in the Turkish Commercial Code (TCC),

A company in Turkey must be registered at the local Trade Register and, after this procedure is accomplished, the investor can begin his activity. The following documents are necessary to incorporate the company:

- letter of undertaking;
- articles of association;
- proof that the share capital has been deposited;
- company establishment statement form;
- identification documents for the company founders;
- documents for individuals appointed to represent the company;

Our company registration agents in Turkey can help you submit these documents and obtain any other special permits and licenses to begin your commercial activity.



## ▶▶ Financial Services

Service	Tools	Advantages
<b>Finance Consulting</b> <ul style="list-style-type: none"><li>❖ Handling all type of daily finance issues</li><li>❖ Management consulting on daily tax and financial issues</li><li>❖ Payroll</li></ul>	<ul style="list-style-type: none"><li>❖ A team of highly skilled and qualified finance experts</li></ul>	<ul style="list-style-type: none"><li>❖ Communication of finance issues in the way our international clients are familiar with</li></ul>
<b>Payment Services</b> <ul style="list-style-type: none"><li>❖ Payment transfers</li><li>❖ Controlling</li><li>❖ Cash flow planning</li></ul>	<ul style="list-style-type: none"><li>❖ Communication with banks</li><li>❖ Controlling content of costs</li><li>❖ Preparation of payment and liquidity plan</li><li>❖ Weekly payments of invoices, wages, expenses, tax and social security</li></ul>	<ul style="list-style-type: none"><li>❖ No in-house financial department necessary</li><li>❖ Professional, well established, standardized service package with control loops</li><li>❖ Additional security</li></ul>



CLASSIFICATION & DUTY  
CALCULATION

Exportwin

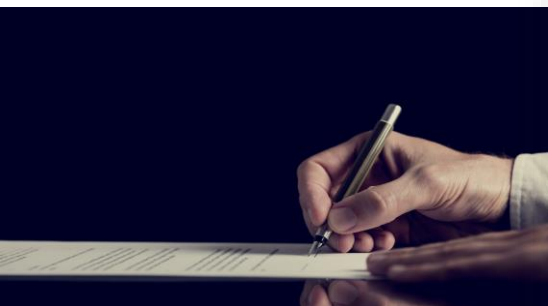
▶▶ Trade  
Logistic  
Services



WAREHOUSING & DISTRIBUTION



EXPORT DOCUMENTATION



SHIPPING & FREIGHT FORWARDING



TURKEY AND IRAN CUSTOMS  
CLEARANCE



## ▶▶ Trade Logistic Services (1)

Service	Tools	Advantages
<b>Classification &amp; Duty Calculation</b> <ul style="list-style-type: none"><li>❖ classifying any products you are importing</li><li>❖ providing your company with the total amount of customs duties that are found due</li></ul>	<ul style="list-style-type: none"><li>❖ A team of highly skilled and qualified trade experts</li></ul>	<ul style="list-style-type: none"><li>❖ It is useful to plan for the added expense and factors it in as part of your costs.</li></ul>
<b>Export Documentation</b> <ul style="list-style-type: none"><li>❖ Preparing documentation in order to move your goods from your country to Turkey, Iraq and Afghanistan</li><li>❖ Helping you to complete the documentation process without delays</li></ul>	<ul style="list-style-type: none"><li>❖ Communication with local partners and related organizations</li></ul>	<ul style="list-style-type: none"><li>❖ Ensuring that everything is done properly means no bureaucracy-induced headaches</li></ul>

## ▶▶ Trade Logistic Services (2)

Service	Tools	Advantages
<b>Shipping &amp; Freight Forwarding</b> <ul style="list-style-type: none"><li>❖ Managing the movement of your freight for exporting to Turkey, Iraq and Afghanistan</li><li>❖ Advising on carrier selection, the best shipping routes, ports of entry, and all aspects of global shipping and freight forwarding</li></ul>	<ul style="list-style-type: none"><li>❖ A team of highly skilled and qualified trade experts</li></ul>	<ul style="list-style-type: none"><li>❖ Offering complete solutions from a single provider, saving your company valuable time and money</li></ul>
<b>Turkey Customs Clearance</b> <ul style="list-style-type: none"><li>❖ Obtaining the fastest possible clearance into Turkey, Iraq and Afghanistan</li><li>❖ Ensuring all government agency requirements are met, such as FDA requirements on food safety</li></ul>	<ul style="list-style-type: none"><li>❖ Communication with local partners and related organizations</li></ul>	<ul style="list-style-type: none"><li>❖ Dealing with Turkey, Iraq and Afghanistan Customs and all other government agencies on behalf of your company</li></ul>

## ▶▶ Trade Logistic Services (3)

Service	Tools	Advantages
<b>Warehousing &amp; Distribution</b> <ul style="list-style-type: none"><li>❖ Arranging for the warehousing of your goods at the port of entry, at your destination, or at a strategically located facility to assist with distribution</li><li>❖ Handling all consolidation and break-bulk operations, pick-and-pack, and the final delivery and distribution of your products</li></ul>	<ul style="list-style-type: none"><li>❖ A team of highly skilled and qualified trade experts</li></ul>	<ul style="list-style-type: none"><li>❖ Offering complete solutions from a single provider, saving your company valuable time and money</li></ul>

Low-budget, overworked team or simply lacking the time, experience or expertise to participate in special event, trade-shows, conventions or exhibit programs for entering Turkey and Iran markets?

Exportwin can help you as your representative in exhibit programs or trade-shows, seamlessly integrating with the responsible parties or departments in Turkey

#### Our Services:

- ✓ Booking exhibit space and registration
- ✓ Providing onsite logistical supports
- ✓ Handling the design of exhibit booths and advertising
- ✓ Managing the trade-shows as your representative with native and professional teams
- ✓ Integrated marketing (pre-event, on-event and post-event marketing plans)

#### Our Benefits:

- Booking the exhibit space at the lower price as a local company
- Excellent working relationships with local venues and local labor unions
- Having extensive knowledge of local venues and business partners
- Conducting deep business meeting with professional negotiator team

## ▶▶ Support for Consulates and Chambers of Commerce

Service	Tools	Advantages
<h3>Matchmaking / Forums</h3> <ul style="list-style-type: none"><li>❖ Understanding the exact needs and goals of each participant company</li><li>❖ Approaching different companies according to these needs and goals to locate local counterparts for each of the participants</li><li>❖ Arranging business meeting and plans.</li><li>❖ Arrange on-site visits (to the local companies' premises by delegate companies) if necessary</li></ul> <h3>Event Organization</h3> <ul style="list-style-type: none"><li>● Seminars</li><li>● Networking Events</li><li>● Business Lunch</li><li>● Round Tables</li></ul>	<ul style="list-style-type: none"><li>❖ Turkish counterpart screening and selection for the targeted industries with long lists and shortlists</li><li>❖ Standardized, optimized procedures using telephone and electronic communication with the possible customers as well as business partners</li></ul>	<ul style="list-style-type: none"><li>❖ Providing individual consultancy to each participant company</li><li>❖ Systematic search ensure the best candidates in Turkey, Iraq and Afghanistan are found.</li><li>❖ Knowledge of the market and culture</li><li>❖ Wide experience and knowledge</li></ul>





# We will assist you for investing in Turkey, Iraq and Afghanistan



General & customized  
business information &  
Sectoral analysis & reports

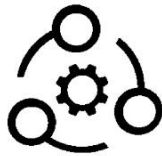


Site selection support to find  
appropriate location/land for  
your investment



Arrangements of meetings  
with governmental bodies  
and other stakeholders

AFTERSALES



Facilitating your  
investment at all stages



Matchmaking with local partners  
& establishing business linkages



Project launch &  
Press release Services



Facilitating your visit  
to Turkey



## Exportwin Commercial Reference Journal (ECRJ)

Through its knowledge and experience in these markets, the Exportwin is trying to offer professional and practical solutions to trade and export demands shortly and efficiently, providing the ground for the presence and success of many foreigner companies.

One of the leading initiatives in this area is the Exportwin Commercial Reference Journal, which, with an efficient and effective approach, enables the owners of goods and services of other countries to offer their businesses in these two markets at the lowest possible cost. The executives of the Exportwin Commercial Reference Journal have created a unique opportunity to increase the likelihood of successful acceptance of foreigner goods and services by potential applicants and potential customers in the region.



## Exportwin Commercial Reference Journal (ECRJ)

The ECRJ has been published in Turkey for the purpose of introducing targeted foreigner goods and services to potential customers. The business reference journal is published in specified time periods and is provided by experienced experts in the field of industrial and commercial affairs.

The special method of distribution of the Exportwin Commercial Reference Journal and introducing businesses in the Journal by qualified and influential representatives of the Exportwin will result in the provision of higher-precision goods and services to individuals and centers with a greater ability and talent to form a business relationship. Now, the Exportwin Commercial Reference Journal is prepared and distributed every three months in two languages: Turkish and English, with a print edition of 6,000 copies. In each edition, 150 foreigner export companies can be introduced. Due to the specialized and professional distribution of the business reference journal, the focus will be on introducing active firms from a limited number of industrial and serving sectors.



# Our Benefits

## Focus on What You Do Best:

Our marketing services enable you to focus on what they like and do best. And, provide more time and attention to other target markets.

## Reduce Business Risk:

Outsourcing B2B or B2C marketing in Turkey, Iraq and Afghanistan as new export target markets will prevent the business owners from making costly mistakes in time and money in trying to implement their own marketing.

## Do More with Less:

Accomplish multiple business priorities simultaneously knowing that your marketing effort in Turkey, Iraq and Afghanistan is being professionally managed and multiple marketing projects are being implemented to grow your business while you resolve other critical business issues in other target markets.

## Save Money:

Hiring and training marketing staff for entering to Turkey, Iraq and Afghanistan adds costly payroll and overhead to your business. Marketing outsourcing can provide more expertise, capabilities and flexibility at less short-term and long-term cost.

# WHY TURKEY ?





# Turkey

Looking for commercial partners in Turkey? List your company on [Macro Market](#).



IMPORTER

EXPORTER

0.03 **ECON COMPLEXITY**  
37TH OF 89



\$139B **EXPORTS**  
25TH OF 120



\$188B **IMPORTS**  
18TH OF 120



\$24.2K **GDP PER CAPITA**  
33RD OF 89



## Economy of Turkey

Turkey is the 25th largest export economy in the world and the 38th most complex economy according to the Economic Complexity Index (ECI). Turkey is often classified as a newly industrialized country by economists and political scientists; while Merrill Lynch, the World Bank, and The Economist describe Turkey as an emerging market economy. The World Bank classifies Turkey as an upper-middle income country in terms of the country's per capita GDP in 2007. In 2016 the GDP of Turkey was \$857B and its GDP per capita was \$24.2k. In 2016, Turkey exported \$139B and imported \$188B, resulting in a negative trade balance of \$49.1B. The EU is by far Turkey's number one import partner. EU exports to Turkey are dominated by machinery and transport material, chemical products and manufactured goods. In 2017 Turkey imported \$188B, making it the 18th largest importer in the world. Turkey imports mainly machinery, chemicals, semi-finished goods, fuels and transport equipment.





## Country of Opportunities

Turkey, with a population of nearly 80 million people, is the country of opportunities so as industrial countries from east and west are seriously competing to seize Turkey' market. Turkey has a special significance in the world of commercial merchandise in terms of its place of business. One of the most important features of this market is the high volume of its import that was about \$188 billion in 2017.





# Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market





# Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

## 1. SUCCESSFUL ECONOMY

- Booming economy; more than tripling its GDP, reaching USD 851 billion in 2017, up from USD 231 billion in 2002 (TurkStat)
- Stable economic growth with an average annual real GDP growth rate of 5.8 percent between 2002 and 2017 (TurkStat)
- Promising economy with a bright future as it is expected to become one of the fastest growing economies among the OECD members during 2018-2019 with an average annual real GDP growth rate of 5.0 percent (OECD)
- 13th largest economy in the world and 5th largest economy compared with the EU in 2017 (GDP at PPP, IMF WEO)
- Institutionalized economy fueled by USD 193 billion of FDI in the last 15 years (CBRT)
- A dynamic and mature private sector with USD 157 billion worth of exports and an increase of 335 percent between 2002 and 2017 (TurkStat)



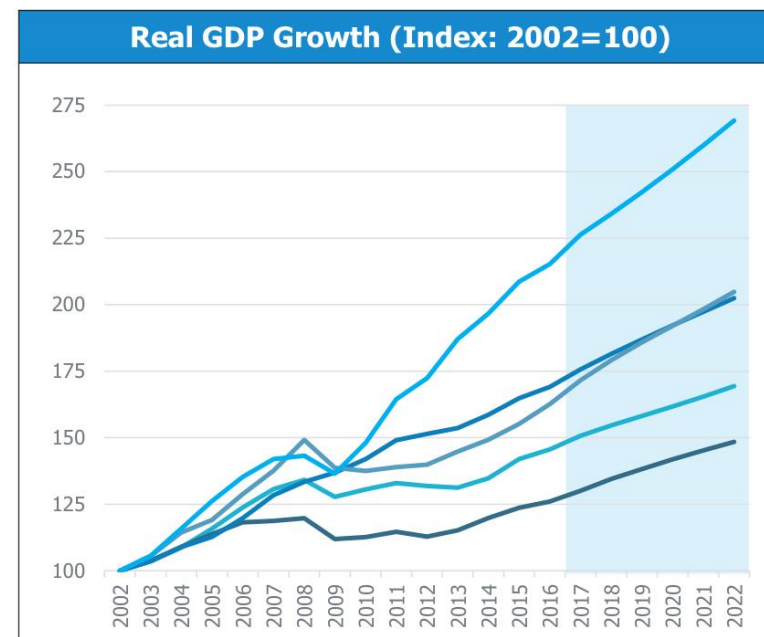
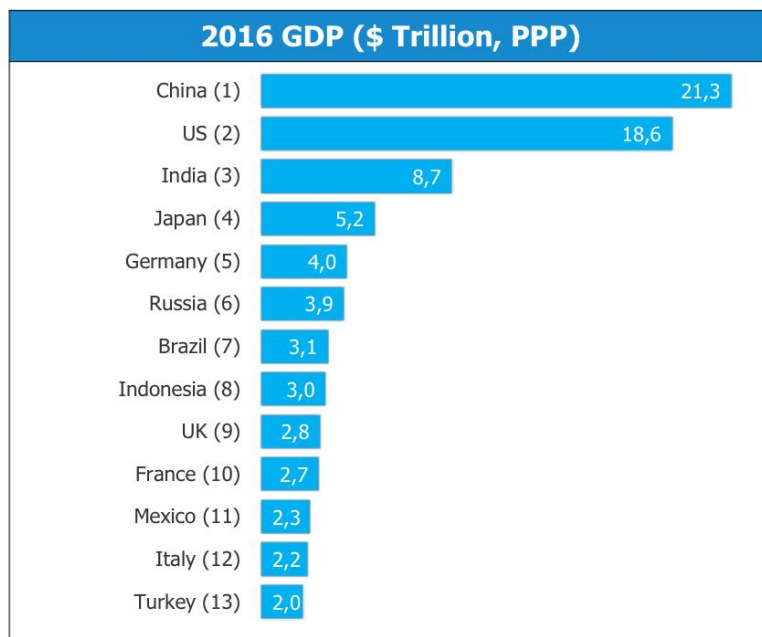


# Robust Economy

Track record growth and bright future ...



13<sup>th</sup> largest economy in the world



Average Annual GDP Growth 2003-2016 %

Turkey **5.6**

Poland **3.8**

Romania **3.5**

Czechia **2.7**

Hungary **1.1**



## Robust Economy

Track record growth and bright future ...

### Real GDP Growth in G20 – 2017

Despite global and regional challenges, Turkey was the fastest growing economy among the G20 members in 2017.



Source: OECD



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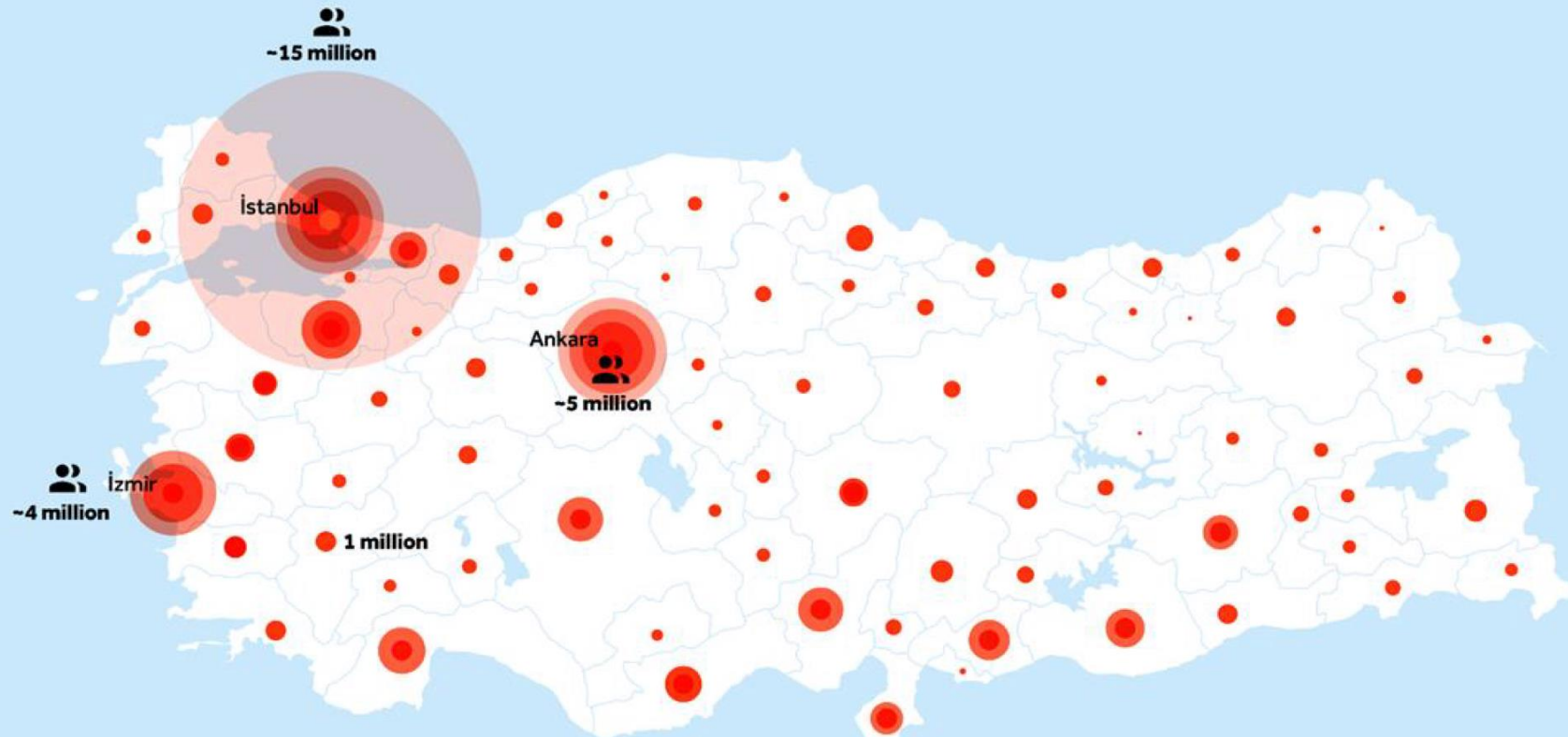
## 2. POPULATION

- A population of 81 million (2017, TurkStat)
- Largest youth population compared with the EU (Eurostat)
- Half the population under the age of 31.7 (2017, TurkStat)
- Young, dynamic, well-educated and multi-cultural population

The demographics of Turkey's population have a positive impact on the country's economy, representing a window of opportunity in many respects. The young and well-educated population of Turkey is considered to be a great asset as investors are facing considerable challenges elsewhere in Europe, such as ageing and shrinking populations.

## Reach 80 million potential consumers in Turkey; More than **20 urban centers** with populations **over 1 million**

There are 22 cities with populations of over 1 million in Turkey. These cities are the engines of economic growth and social development through their production of goods and services. In terms of population, Istanbul is the largest city in Europe.

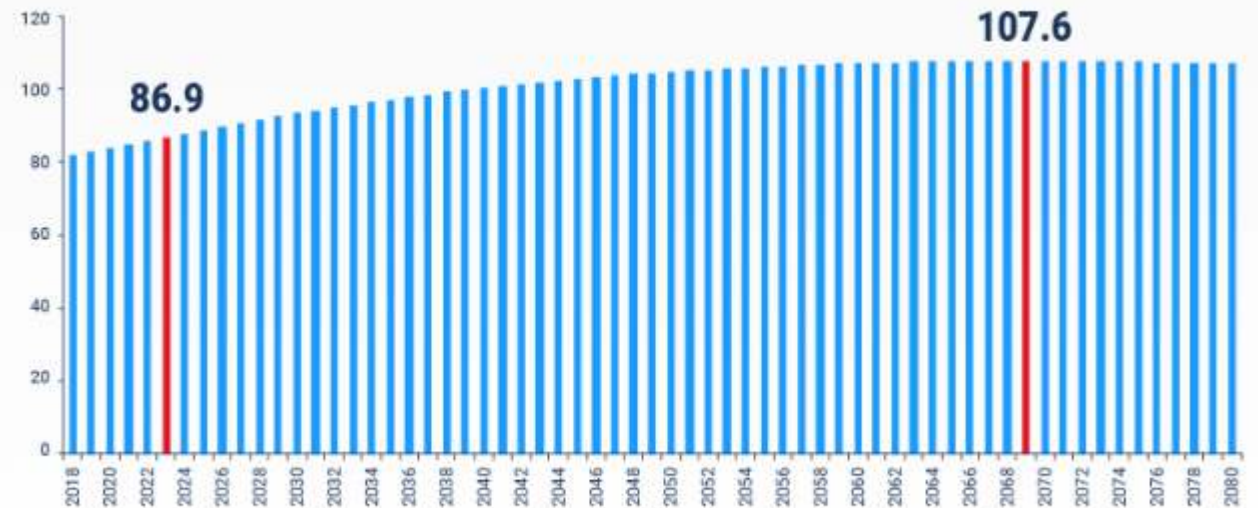




## Turkey Population

Turkey's population was registered as 80.8 million in 2017. It is expected to reach 86.9 million by 2023, and 100.3 million by 2040, according to the Turkish Statistical Institute (TurkStat). The population is projected to maintain its growth momentum until 2069, where it will peak at 107.6 million.

Population Projections – 2018-2080 (millions)



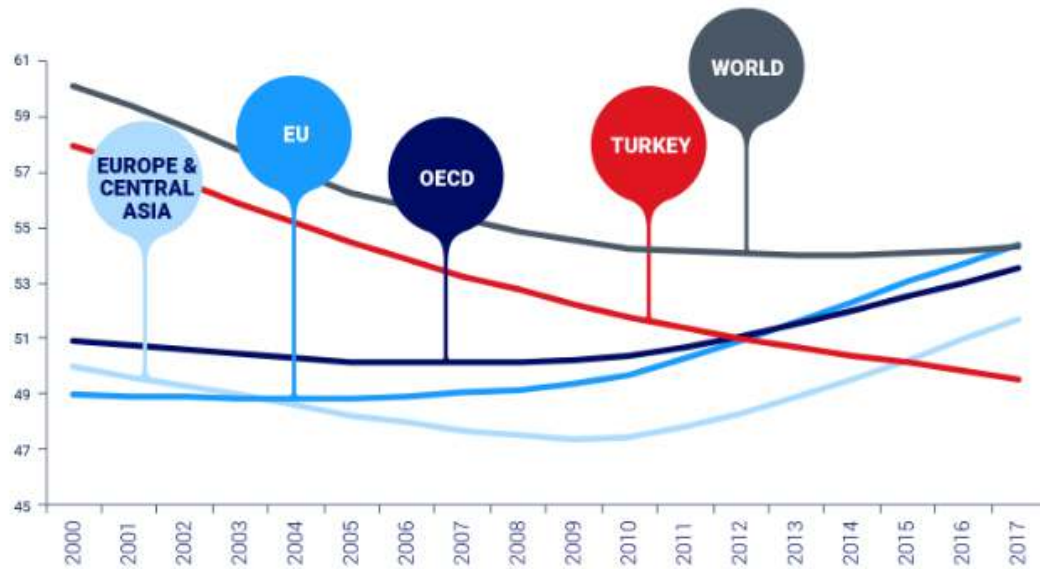
Source: TurkStat



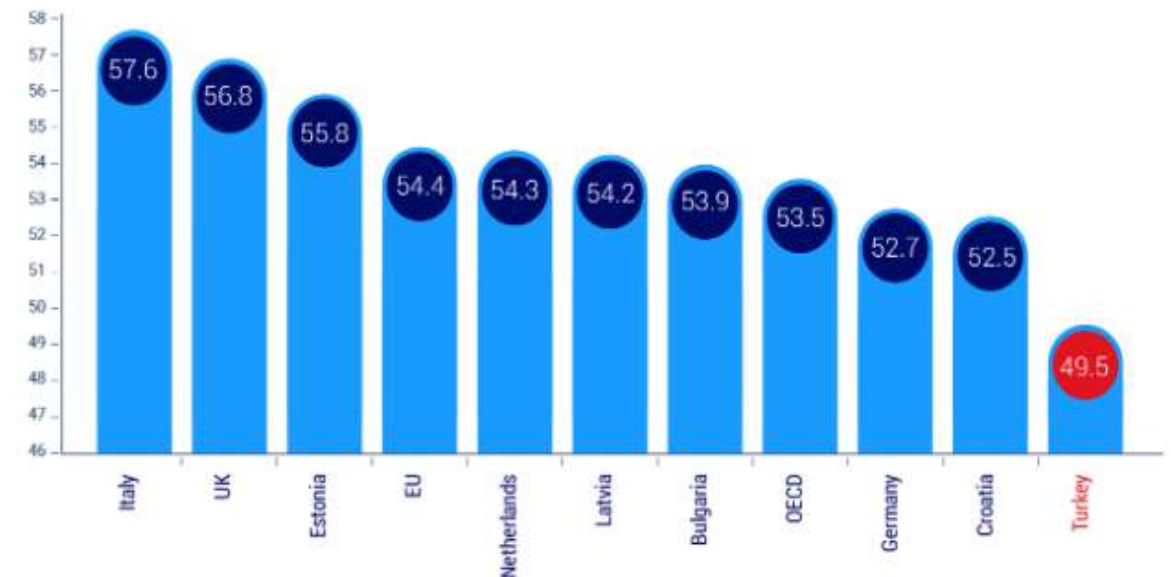
# Population

Turkey offers excellent opportunities with its growing, young, and dynamic population – an indispensable contributor to a strong labor pool and a lucrative domestic market.

Age Dependency Ratio by Region (% of working-age population) – 2017



Age Dependency Ratio by Countries (% of working-age population) – 2017







# Turkey Population

## Labor Force

Turkey's labor force is around 31.6 million people, which makes Turkey the 3rd largest labor force market in Europe.

Turkey's young population is an important contributor to labor force growth and has boosted the country's rank over its competitors. Turkey has posted the largest labor force growth in relation to EU countries.

	Germany	UK	Turkey	France	Italy	Spain	Poland	Romania	Czech Rep.	Hungary
Labor Force (million)	43.3	33.4	31.6	29.7	25.9	22.7	17.3	8.8	5.4	4.6
Growth Rate % (2005-2017)	0.5	0.9	3.2	0.7	0.5	0.6	0.1	-0.1	0.3	0.8
Growth Projection % (2017-2019)	0.8	0.8	3.2	0.5	0.5	0.1	0.1	N.A.	0.5	0.9



Annual Average Increase in Labor Productivity (%)

Source: OECD, World Bank, ISPAT, NA: Not Available



## Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

### 3. QUALIFIED AND COMPETITIVE LABOR FORCE

- Over 30.5 million young, well-educated and motivated professionals (2016, TurkStat)
- Increasing labor productivity
- Approximately 800,000 students graduate annually from over 183 universities (2016, CoHE)
- More than 950,000 high school graduates with around half from vocational and technical high schools (2016, Ministry of National Education)





# Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

## 4. LIBERAL AND REFORMIST INVESTMENT CLIMATE

- The 2nd biggest reformer among OECD countries in terms of its restrictions on FDI since 1997 (OECD FDI Regulatory Restrictiveness Index 1997-2017)
- Business-friendly environment with an average of 6.5 days to set up a company (World Bank Doing Business Report 2018)
- Highly competitive investment conditions
- Strong industrial and service culture
- Equal treatment for all investors
- Around 58,400 companies with international capital in 2017 (Ministry of Economy)
- International arbitration
- Guarantee of transfers



## Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

### 5. INFRASTRUCTURE

- New and highly-developed technological infrastructure in transportation, telecommunications and energy
- Well-developed and low-cost sea transport facilities
- Railway transport advantage to Central and Eastern Europe
- Well-established transportation routes and direct delivery mechanism to most of the EU countries



## Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

### 6. CENTRALLY LOCATED

- A natural bridge between both East-West and North-South axes, thus creating an efficient and cost-effective outlet to major markets
- Easy access to 1.7 billion customers in Europe, Eurasia, the Middle East and North Africa
- Access to multiple markets worth USD 25 trillion of GDP



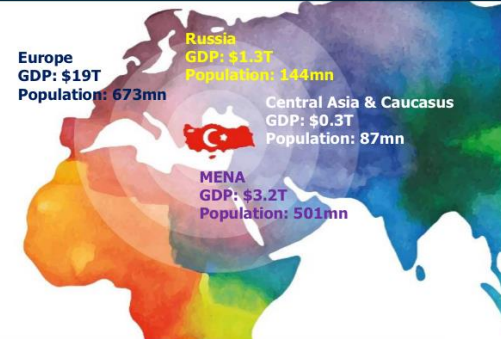
# Strategic location

To manufacture, provide international service, export and manage ...

## Connectivity with key markets through road, rail, sea and air..



## Proximity to major markets (1.5 billion people and \$24T GDP\* at 4 hour flight-distance)



## Follow and cover markets in 16 time zones from New York to Tokyo



## Turkish Airlines connects you to 246 destinations in 120 countries



## Already a manufacturing & export hub for global companies..

**TOYOTA** Exporting 85% of its production



Exporting 77% of its production



Production base for MENA



Largest production facility worldwide

## As well as a management hub managing dozens of countries..

B/S/H/	89 countries
GE Healthcare	80 countries
intel	67 countries
Verifone	60 countries
RIFC	52 countries
Unilever	35 countries
gsk	30 countries



## Why Invest in Turkey

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### 7. ENERGY CORRIDOR AND TERMINAL OF EUROPE

- An important energy terminal and corridor in Europe connecting the East and the West
- Located at a close proximity of more than 70 percent of the world's proven primary energy reserves, while the largest energy consumer, which is Europe, is located right to the west of Turkey, thus making the country a linchpin in energy transit and an energy terminal in the region



## Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

### 8. LOW TAXES & INCENTIVES

- Corporate Income Tax reduced from 33 percent to 20 percent (22 percent for 2018, 2019 and 2020)
- Tax benefits and incentives in Technology Development Zones, Industrial Zones and Free Zones, including total or partial exemption from Corporate Income Tax, a grant on employer's social security share, as well as land allocation
- R&D and Innovation Support Law
- Incentives for strategic investments, large-scale investments and regional investments



## Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

### 9. CUSTOMS UNION WITH THE EU SINCE 1996

- Customs Union with the EU since 1996 and Free Trade Agreements (FTA) with 21 countries (Ministry of Trade)
- More FTAs underway
- Accession negotiations with the EU





## Customs Union and Free Trade Agreements (FTA)

A Customs Union Agreement between Turkey and the European Union has been in effect since 1996. The agreement allows trade between Turkey and the EU countries without any customs restrictions. The EU-Turkey Customs Union is one of the steps toward full Turkish membership of the EU itself.

Turkey has FTAs with 42 countries, creating a free trade area in which the countries agree to eliminate tariffs, quotas and preferences on most goods and services traded between them. This framework explains why many global companies are now using Turkey as a second supply source and manufacturing base, not only for the EU and rapidly growing Turkish markets, but also for the Middle East, Black Sea and North African markets, with the added advantage of a relatively low-cost but well-educated labor force, coupled with cost-effective transportation.

### 37 countries

Albania, Bosnia and Herzegovina, Egypt, Georgia, EFTA, Faroe Islands, Israel, South Korea, Macedonia, Moldova, Morocco, Malaysia, Mauritius, Palestine, Jordan, Singapore, Syria\*, Tunisia, Montenegro, Serbia, Chile  
Countries that have finalized the negotiation process:, Ghana, Kosovo, Lebanon, Sudan ,

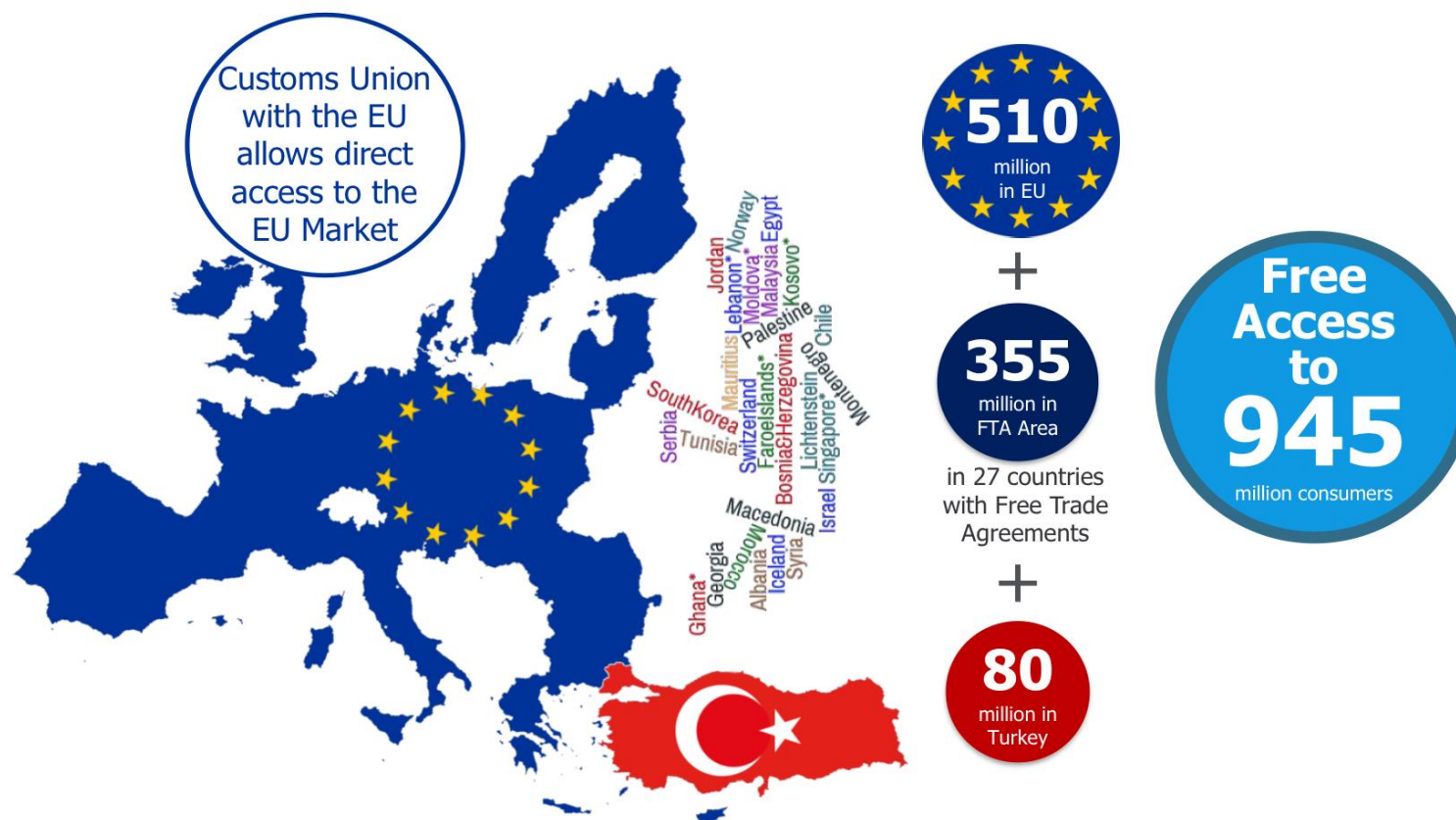
Countries in the negotiation process: Chad, Democratic Republic of the Congo, Cameroon, Colombia, Djibouti, Ecuador, Gulf Cooperation Council, Indonesia, Japan, Libya, Mexico, Mercosur, Pakistan, Peru, Seychelles, Thailand, Ukraine

**Source:** Ministry of Trade



## Domestic market + EU market

Direct access to the EU market via Customs Union with the EU ; .





## Why Invest in Turkey

10 strong reasons to invest and expand your business in turkey market

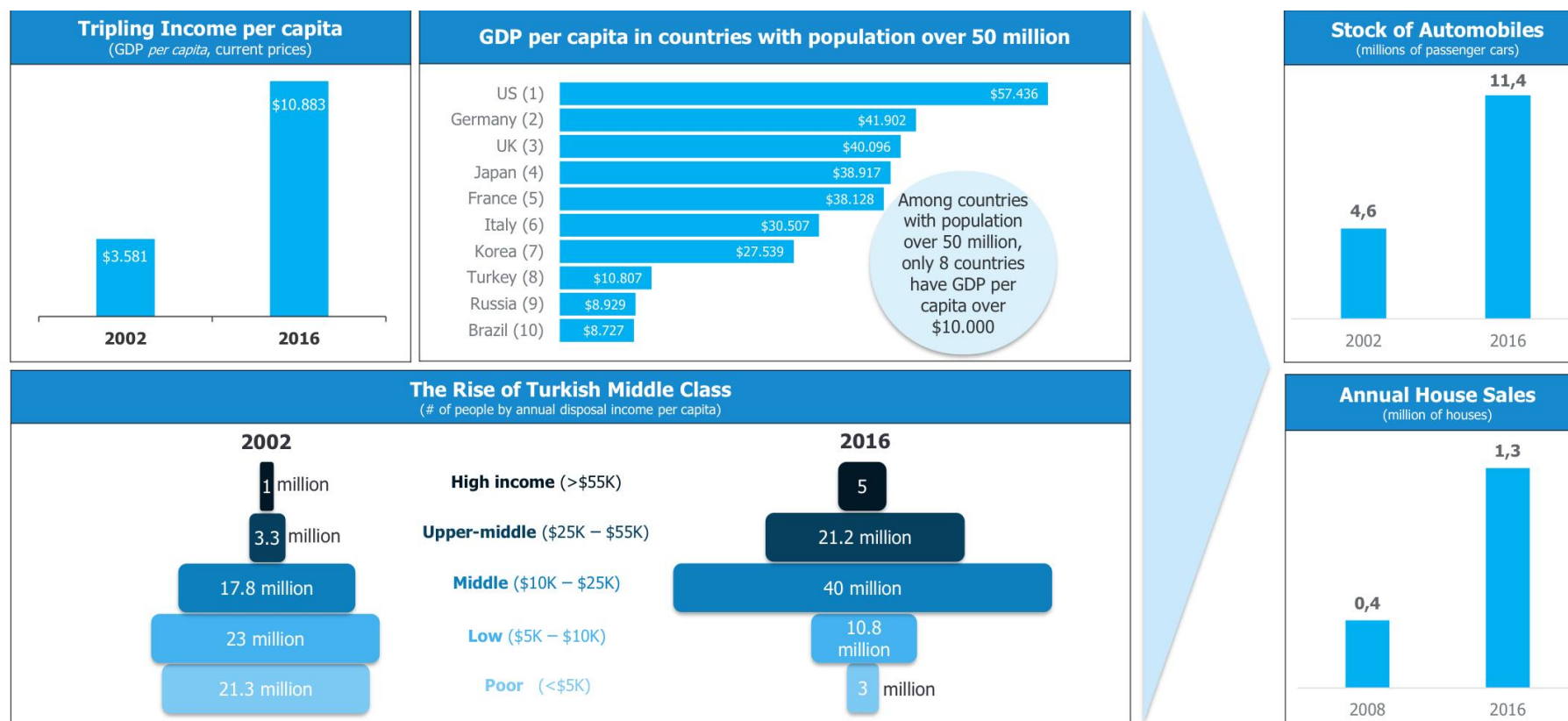
### 10. LARGE DOMESTIC MARKET

- 69 million broadband internet subscribers in 2017, up from 0.1 million in 2002 (ICTA, TurkStat)
- 78 million mobile phone subscribers in 2017, up from 23 million in 2002 (TurkStat)
- 62.5 million credit card users in 2017, up from 16 million in 2002 (The Interbank Card Center of Turkey)
- 193 million airline passengers in 2017, up from 33 million in 2002 (TurkStat)
- 38 million international tourist arrivals in 2017, up from 13 million in 2002 (TurkStat)



# Turkey Domestic Market

Economic growth has paved the way for emergence of a sizable middle-class with an increasing purchasing power



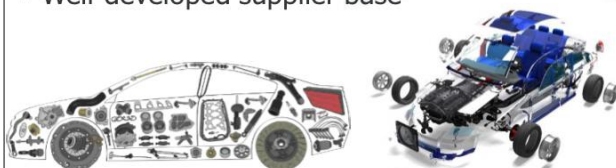


# Opportunities

Turkey Offers abundant opportunities in a variety of sectors

## AUTOMOTIVE

- 14<sup>th</sup> largest auto producer in the world
- 2<sup>nd</sup> largest auto source to the EU
- Production: over 1 million vehicles per year
- Market: \$25 bn (CAGR: 6%)
- Export: \$20 bn
- Well-developed supplier base



## MACHINERY & ELECTRICAL EQUIPMENT

- Largest TV & white goods producer in Europe
- Market: \$40 bn (CAGR: 6.5%)
- Export: \$21 bn



## AEROSPACE & DEFENCE

- \$15 bn defense spending
- Market: \$5+ bn (CAGR: 12%)
- Exports: \$1.7 bn (CAGR: 13%)
- A civil aviation hub
- Civilian fleet size: 540
- Civilian passengers: 174 mn
- Well-developed clusters
- Strong support for joint ventures with foreign firms



## ENERGY

- Market: \$70 bn (CAGR: 8%)
- Growing demand
- Energy corridor; proximity to 70% of world's proven primary energy sources
- Untapped renewable sources
- Government support to renewables



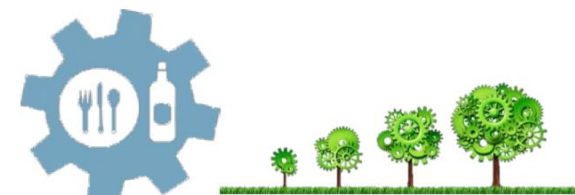
## METALS

- 8<sup>th</sup> largest steel producer in the world
- 2<sup>nd</sup> largest steel producer in EU
- Production: \$55B [CAGR: 7%]
- Export: \$25B [CAGR: 8.5%]
- Import: \$31B [CAGR: 5.8%]



## AGROFOOD & BEVERAGE

- Market: \$70 bn (CAGR: 8%)
- Export: \$17 bn
- Turkey exports 1,781 types of agricultural products to 190 countries






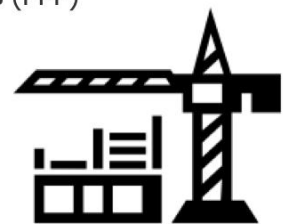







# Opportunities

Turkey Offers abundant opportunities in a variety of sectors

<b>FINANCIAL SERVICES</b> <ul style="list-style-type: none"><li>▪ Robust growth with double digits</li><li>▪ Growing interest in Islamic finance</li><li>▪ Istanbul Financial Center</li><li>▪ Unsaturated insurance sector</li><li>▪ Strong presence of foreign investors</li></ul> 	<b>PPP</b> <ul style="list-style-type: none"><li>▪ ~\$150 bn PPP investment (2003-2016)</li><li>▪ \$325 bn PPP investment expected (2017-2023)</li><li>▪ Transportation</li><li>▪ Healthcare</li><li>▪ Energy</li></ul>  	<b>RETAIL</b> <ul style="list-style-type: none"><li>▪ Increasing income per capita</li><li>▪ Wealthy tourists from West and Gulf generating sales for retailers in medium and high price range segments.</li><li>▪ Growing affluence for luxury retailers</li></ul> 
<b>PRIVATE EQUITY</b> <ul style="list-style-type: none"><li>▪ Growth companies with track record, but need financing for their full potential</li><li>▪ Companies on fast track to international growth with lucrative export opportunities</li><li>▪ Diversified sectors with promising growth</li><li>▪ Successful family-owned firms with succession issues</li><li>▪ Strong int'l PE presence</li><li>▪ Entrepreneurial business culture</li></ul> 	<b>CONSTRUCTION</b> <ul style="list-style-type: none"><li>▪ Market: \$93bn with CAGR of 10% ('06-'15)</li><li>▪ Annual average number of new dwelling units: &gt;800K in past 5 years</li><li>▪ Infrastructure projects (PPP)</li></ul> 	<b>REAL ESTATE</b> <ul style="list-style-type: none"><li>▪ Turkish Citizenship offered to property buyers</li><li>▪ No reciprocity</li><li>▪ Residential and commercial opportunities</li><li>▪ Strong demand for malls &amp; grade A retail units</li><li>▪ Sustainable yields</li></ul> 



Turkey

## Imports

In 2017 Turkey imported \$188B, making it the 18th largest importer in the world

The Turkish import regime highlights the liberalization of Turkish imports in line with its commitment to complete the Customs Union with the EU, its relationship with EFTA, and its obligations under the World Trade Organization (WTO). Turkey has placed special emphasis on its commitment to reduce customs duties in order to align itself with the Common Customs Tariff. Turkey has made some necessary modifications to its import regime, and on January 1, 1996 the Customs Union with the EU became effective.

The basic aims of Turkey's import policy since the early 1980s can be summarized as follows:

- To reduce protectionist measures in conformity with the new GATT rules
- To reduce bureaucratic procedures
- To secure a supply of raw materials and intermediary goods at suitable prices with certain quality standards

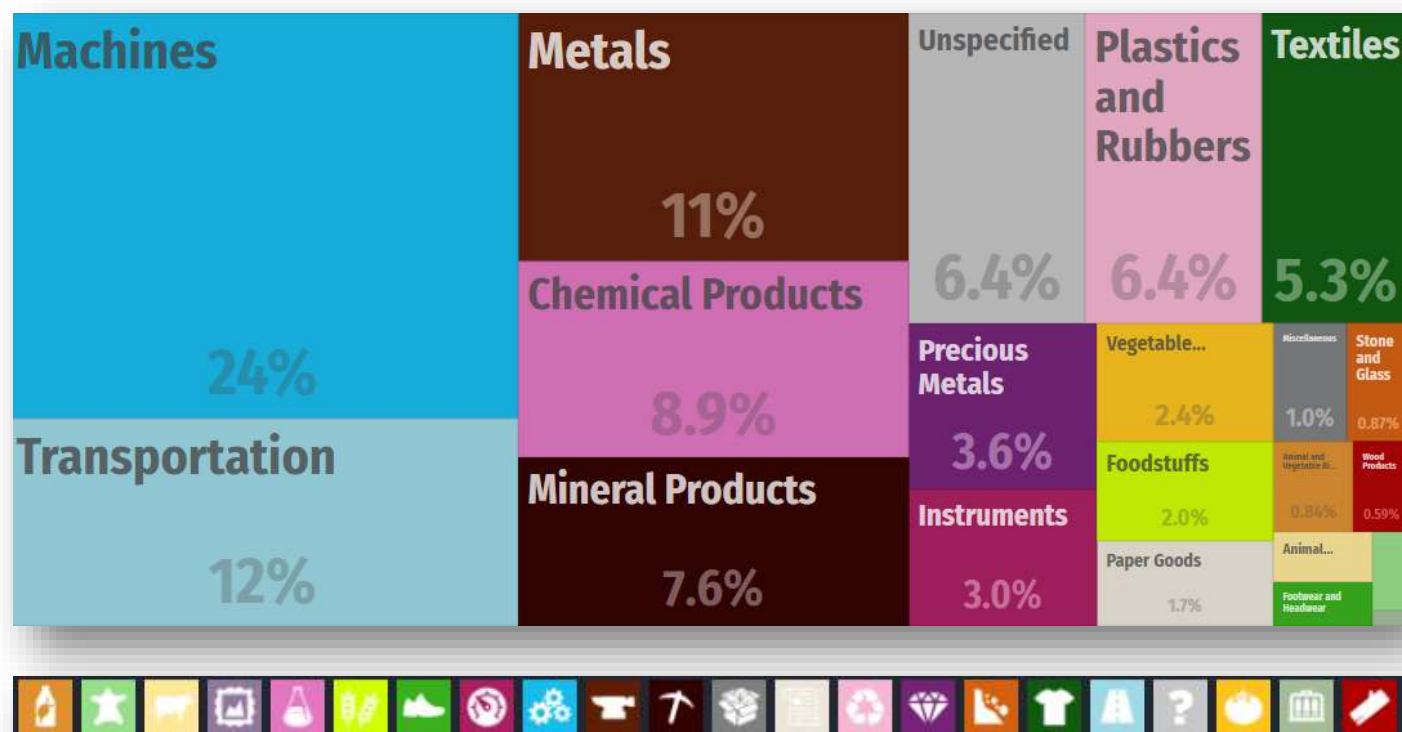




Turkey

## Imports

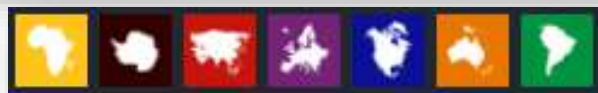
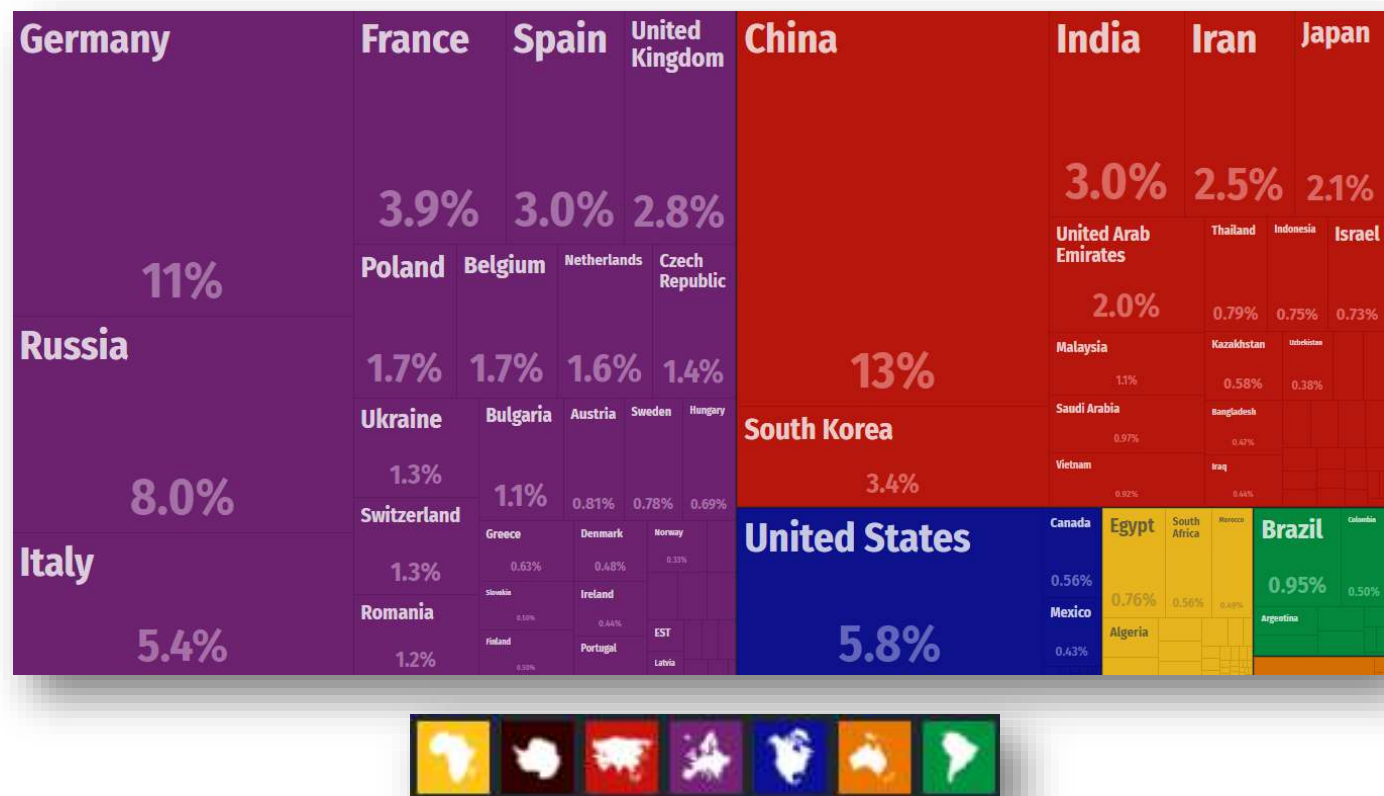
In 2017 Turkey imported \$188B, making it the 18th largest importer in the world





# Imports

Where does Turkey import from in 2017?



# Organizations and Institutions We Cooperate



REPUBLIC OF TURKEY  
**PRIME MINISTRY  
INVESTMENT  
SUPPORT & PROMOTION  
AGENCY**



REPUBLIC OF TURKEY  
**MINISTRY OF TRADE**



World Association of  
Investment Promotion  
Agencies



**TİM** TURKISH  
EXPORTERS  
ASSEMBLY



Discover  
the potential



MUSIAD



MOSFED



TETSIAD



T.C. Sağlık Bakanlığı



MİB



SİDEFE



TASEV



TİSAD



T.C. İçişleri Bakanlığı



T.C. Adalet Bakanlığı



AYSAAD



TÜRKİYE SERAMİK FEDERASYONU  
TURKISH CERAMICS FEDERATION



TİMİDER



ETÜDER



İSTANBUL  
BÜYÜKŞEHİR  
BELEDİYESİ



KOSGEB



SGK



T.C. Kültür Bakanlığı



OHSAD



İSEM



EVSAD



ASANİSAD



PROMOTURK



TASIAD



DISSIAD



T.C. MADEN BAKANLIĞI



BASIN YATIRIM BİRLİĞİ



T.C. SANAYİ BAKANLIĞI



T.C. TURİZM BAKANLIĞI



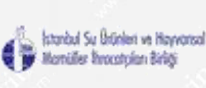
TCDD



MTSO



T.C. Sağlık Bakanlığı



İSTANBUL SU ÜRÜNLERİ VE HAYVANSAL ÜRÜNLER DERNEĞİ



TÜBİTAK



YESİDEF



İYSAD



TÜRES



TÜRİSAB



TÜRİOB



T.C. SANAYİ BAKANLIĞI



T.C. SANAYİ BAKANLIĞI



MTSO



T.C. SANAYİ BAKANLIĞI



MESİAD



AKİB

## Success Stories



Unilever, one of the oldest global corporations in the world, is a one-hundred percent publicly held company that operates in more than 190 countries. While Unilever made its first investment in Turkey in 1952 with the Sana factory established in Bakırköy, Istanbul, Unilever has been creating added value in Turkey for more than 100 years with its products. Unilever's products in Turkey include OMO, Rinso, Yumoş, Domestos, Cif, Sunlight, Elidor, Dove, Dove Men, Toni&Guy, Signal, Clear, Rexona, Lux, Axe, Sana, Lipton, Knorr, Calve, Becel, Algida, Carte d'Or, Cornetto, Magnum, UFS, Hellmann's and Vaseline

With cooperating to Exportwin, it continues to invest in Turkey, an important regional base, in order to increase its sustainable growth capacity. After a EUR 95 million investment made for the Algida ice-cream factory in Konya, which started its operations in June 2013, the second investment in Konya was made for a home and personal care products factory in May 2017. Thus, Unilever has created a strong supply chain ecosystem in Konya with its suppliers and has implemented the largest factory investment of the last decade in the Turkish FMCG sector with an integrated investment value reaching EUR 350 million in total. This is also the largest investment ever made in Konya across all sectors.



## Success Stories



Founded in Berlin, Germany in 2011, Delivery Hero has become a worldwide leader in the online food ordering business. The company serves over 17 million users, has operations in 33 countries, and partners with more than 271,000 restaurants,. Delivery Hero has received a record number of 127 million orders in the first three quarters of 2016 alone. Delivery Hero is a parent company that brings together more than 20 successful brands. Among its leading brands is Yemeksepeti – a pioneer in the formation and development of the e-commerce industry in Turkey, and one of the first online food ordering platforms in the world.

With cooperating to Exportwin in 2015, Delivery Hero came to Turkey and it acquired 100 percent of Yemeksepeti's shares, which at the time were valued at USD 589 million. Labelled a record investment, this takeover stood unmatched as the biggest investment in Turkey's internet sector at the time. The acquisition seamlessly integrated Yemeksepeti into Delivery Hero's business. Allowed to maintain its established brand identity, Yemeksepeti has been propelled today to reach a record growth rate of approximately 70 percent in its 15<sup>th</sup> year in business. Yemeksepeti serves more than 6 million users and is constantly adding to its current 13,000 restaurant partners.

## Success Stories









UPS was founded in 1907 in Seattle, Washington, USA, and has since become a global leader in logistics. It offers a broad range of solutions including the transportation of packages and freight, facilitation of international trade, and deployment of advanced technology to more efficiently manage the world of business. With its wide array of services to more than 220 countries and territories, UPS delivers more than 20 million packages every day.

With Turkey increasingly becoming a transportation bridge and near-sourcing location connecting Europe and Asia, having a young and dynamic population, and offering good opportunities for long-term growth, the market has become increasingly important to UPS. In 2010, UPS acquired its long-standing Turkish authorized service contractor and started its own operations in Turkey. Today, the UPS network covers the whole of Turkey and has sizeable domestic and international operations with more than 20 points of access, 18 hubs equipped with the latest technology, one Supply Chain Solution center including more than 3,000 m<sup>2</sup> of warehouse space, more than 2,100 employees, 500 delivery vehicles, and a dedicated daily flight to/from Istanbul and Cologne.

## Some other Customers







# Market Entry: Business Setup Projects in Turkey

Company		Field of Activity	Year	Contact
Techno System Japan		Energy "Water," "food" and "electricity"	2018	<a href="mailto:info@techno-sys.jp">info@techno-sys.jp</a> <a href="http://www.techno-sys.jp">www.techno-sys.jp</a>
Navid Zar Chimi Industrial		Polypropylene products	2018	<a href="mailto:info@navidzarchimi.com">info@navidzarchimi.com</a> <a href="http://www.navidzarchimi.com">www.navidzarchimi.com</a>
Negin Tejarat Shargh Chemical		Chemical raw materials	2017	<a href="mailto:nchemicalgroup@gmail.com">nchemicalgroup@gmail.com</a> <a href="http://www.nchemicalgroup.com">www.nchemicalgroup.com</a>
Zipcar		car club and hire	2017	<a href="mailto:info@zipcar.com.tr">info@zipcar.com.tr</a> <a href="http://www.zipcar.com.tr">www.zipcar.com.tr</a>
Sompo Japan Sigorta		Insurance	2016	<a href="mailto:info@sompojapan.com.tr">info@sompojapan.com.tr</a> <a href="http://www.sompojapan.com.tr">www.sompojapan.com.tr</a>
Zarrin Jam Marina Company		Beverage	2016	<a href="mailto:marina@zjm.ir">marina@zjm.ir</a> <a href="http://www.sunstarjuice.ir">www.sunstarjuice.ir</a>



## Some other Customers

# Market Entry: Business Setup Projects in Turkey

Company		Field of Activity	Year	Contact
MINI SOU		Chain Stores	2015	<a href="mailto:info@miniso.com.tr">info@miniso.com.tr</a> <a href="http://www.miniso.com.tr">www.miniso.com.tr</a>
Behran Oil Company		lubricant manufacturing	2015	<a href="mailto:export@behranoil.com">export@behranoil.com</a> <a href="http://www.behranoil.com">www.behranoil.com</a>
Alborz Steel Industries Co.		Kitchen hood, oven and sink	2014	<a href="mailto:info@steelalborz.com">info@steelalborz.com</a> <a href="http://www.steelalborz.com">www.steelalborz.com</a>
Alborz Ceramic		Construction ceramics	2013	<a href="mailto:export@alborzceramic.com">export@alborzceramic.com</a> <a href="http://www.alborzceramic.com">www.alborzceramic.com</a>
Alvan		paint & resin production	2012	<a href="mailto:info@alvanpaint.com">info@alvanpaint.com</a> <a href="http://www.alvanpaint.com">www.alvanpaint.com</a>
Barez Industrial Group		tire	2011	<a href="mailto:info@barez.com">info@barez.com</a> <a href="http://www.barez.com">www.barez.com</a>

# Some other Customers






## Market Entry: Business Partner

(Sales Representative or Distributor)

Company		Field of Activity	Year	Contact
TANER INDUSTRIAL TECHNOLOGY (M) SDN BHD		equipment for the palm oil mill industry	2018	<a href="mailto:info@taner.com.my/">info@taner.com.my/</a> <a href="http://www.taner.com.my/">www.taner.com.my/</a>
White Glove		Rubber Gloves	2018	<a href="mailto:info@fseason.vn">info@fseason.vn</a> <a href="http://fseason.vn">http://fseason.vn</a>
Assel		contract manufacturing services provider	2018	<a href="mailto:servis@asselems.com">servis@asselems.com</a> <a href="https://asselems.com">https://asselems.com</a>
Kachiran		Sewing Machine Factory	2017	<a href="mailto:crm@kachiran.ir">crm@kachiran.ir</a> <a href="http://www.kachiran.ir">www.kachiran.ir</a>
Mammut Industrial Complex		All kinds of dump trailers, trailers	2017	<a href="mailto:info@mammutco.com">info@mammutco.com</a> <a href="http://www.mammutco.com">www.mammutco.com</a>
Naamjoo Company		Industrial Machinery Manufacturer	2017	<a href="mailto:info@namjoo-ft.com">info@namjoo-ft.com</a> <a href="http://namjoo-ft.com">http://namjoo-ft.com</a>

## Some other Customers

### Market Entry: Purchase Order Projects

Company		Field of Activity	Year	Contact
Tak Makaron		pasta	2018	<a href="mailto:info@takmakaron.com">info@takmakaron.com</a> <a href="http://www.takmakaron.com">www.takmakaron.com</a>
Zarif Mosavar Industrial Production Group		moquette and nonwoven fibers	2018	<a href="mailto:export@zarifmosavar.com">export@zarifmosavar.com</a> <a href="http://www.zarif-mosavar.com">www.zarif-mosavar.com</a>
Victoria Oil		Olive oil	2018	<a href="mailto:info@voil.ir">info@voil.ir</a> <a href="http://www.voil.ir">www.voil.ir</a>
Mehr Chemistry of Sepidar		Detergents and beauty products	2017	<a href="mailto:Info.alovex@gmail.com">Info.alovex@gmail.com</a> <a href="http://www.alovex.ir">www.alovex.ir</a>
Kaveh Industrial Group		Safe box and equipment	2017	<a href="mailto:officecenter.co@yahoo.com">officecenter.co@yahoo.com</a> <a href="http://www.offdc.com">www.offdc.com</a>





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