

TÜRKİYE

**A LAND OF MINERAL WEALTH.
A HUB FOR GLOBAL INVESTMENT.**

Strategically located between Europe, Asia, the Middle East, and Africa, Türkiye offers rich mineral resources, skilled workforce, modern infrastructure, and government support for a strong and sustainable mining sector.



STRATEGIC LOCATION

A natural bridge between continents and global markets.



RICH MINERAL RESERVES

Over 90 types of minerals with high economic value.



GROWING INVESTMENTS

Attractive opportunities with strong returns and government incentives.



SUSTAINABLE FUTURE

Innovation, responsible mining, and environmental commitment.

**“ Strong resources.
Smart investments.
Sustainable future.
Türkiye leads the way. ”**

TÜRKİYE'S MINERAL DIVERSITY



BORON



COPPER



CHROMIUM



MARBLE



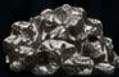
LIMESTONE



GOLD



IRON ORE



ZINC



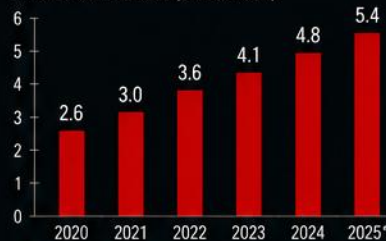
AND MORE...



Over 90 types of minerals with high economic potential.

MINING INVESTMENTS ON THE RISE

INVESTMENT VOLUME (BILLION USD)



TOTAL INVESTMENT VOLUME 2025*
5.4
BILLION USD

AVERAGE ANNUAL GROWTH (2020-2024)
+16.1%

KEY ADVANTAGES



STRONG LEGAL FRAMEWORK

Stable mining laws and investor protection.



MODERN INFRASTRUCTURE

Developed transport, energy, and logistics networks.



SKILLED WORKFORCE

Experienced engineers and qualified professionals.



SUSTAINABILITY FOCUS

Responsible mining for a greener and better tomorrow.

GLOBAL MARKETS, GLOBAL REACH

Exporting to 180+ countries worldwide.



OUR VISION

To be a leading force in global mining through value creation, innovation, and sustainable practices.



LET'S BUILD THE FUTURE TOGETHER

Partner with Türkiye for a stronger, more sustainable, and prosperous future.



02 COUNTRY OVERVIEW

A STRATEGIC BRIDGE BETWEEN RESOURCES AND MARKETS

Türkiye is uniquely positioned at the crossroads of Europe, Asia, and the Middle East, offering a rare combination of rich mineral resources, developed infrastructure, and a dynamic industrial base.

The country's mining and natural stone sectors play a vital role in the economy, supporting manufacturing, construction, energy, and technology industries while creating employment and driving exports.



KEY FACTS



POPULATION

85+

MILLION



GDP (2025)

~1.1

TRILLION USD



GDP GROWTH (2025)

~3.2%

(EST.)

STRATEGIC
LOCATIONBridge between
3 continents

SECTOR OVERVIEW



MINING

Diverse mineral resources with high potential for growth and value addition.



MINERALS

Critical and industrial minerals essential for energy transition and high-tech industries.



NATURAL STONE

World-renowned marble and decorative stones with strong global demand.



MACHINERY

Advanced mining and processing machinery supporting productivity and innovation.



EXPORTS

Strong export network reaching Europe, Asia, Middle East and beyond.

MAJOR MINING REGIONS



Türkiye's geological diversity offers a wide range of minerals across multiple regions, from industrial hubs to emerging exploration areas.

WHY TÜRKİYE?

- ✓ Abundant mineral reserves and high-quality natural stone.
- ✓ Strategic location with access to major global markets.
- ✓ Skilled workforce and strong industrial base.
- ✓ Competitive production costs and supportive government policies.
- ✓ Growing focus on sustainability and responsible mining.

03 KEY STATISTICS & NUMBERS
TÜRKİYE AT A GLANCE

Türkiye possesses a wide range of mineral resources and high-quality natural stone reserves. The sector continues to contribute to the economy through exports, employment, and regional development.



ECONOMIC CONTRIBUTION (2025)



~1.1%

MINING SECTOR
CONTRIBUTION TO GDP

~150,000+

DIRECT & INDIRECT
EMPLOYMENT~6.2
BILLION USD
MINERAL & STONE
EXPORTS~10.7
BILLION USD
TOTAL MINING SECTOR
REVENUE

MINERAL RESERVES (SELECTED)

MINERAL	RESERVES
Borates	~2.1 Billion Tons
Feldspar	~90 Million Tons
Chromite	~163 Million Tons
Copper	~1.0 Million Tons
Lead-Zinc	~4.5 Million Tons
Iron Ore	~1.5 Billion Tons
Marble (Dimension Stone)	~5.0 Billion m ³
Travertine	~65 Million m ³

Source: MTA, TUIK, IMIB, Various 2025

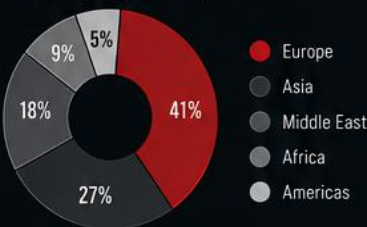
PRODUCTION (2025)

COMMODITY	ANNUAL PRODUCTION
Borates	~5.3 Million Tons
Chromite	~4.3 Million Tons
Copper (Contained)	~110,000 Tons
Iron Ore	~9.0 Million Tons
Lignite	~105 Million Tons
Marble (Block)	~7.5 Million m ³
Natural Stone (Processed)	~2.1 Million Tons

EXPORTS (2025)

TOP EXPORT PRODUCTS	EXPORT VALUE (USD)
Natural Stone	~2.1 Billion
Borates	~1.3 Billion
Feldspar	~550 Million
Chrome Ore	~420 Million
Copper & Concentrates	~350 Million
Iron & Steel Raw Materials	~320 Million
Industrial Minerals	~1.2 Billion

EXPORTS BY REGION (2025)



MINING SECTOR CONTRIBUTION TO GDP



TOP MINING REGIONS



Türkiye's mineral wealth is widely distributed across strategic regions with strong infrastructure potential.

SECTOR HIGHLIGHTS

- Türkiye ranks among the world's leading countries in boron and natural stone reserves.
- Strong industrial base and skilled workforce.
- Strategic location bridging Europe, Asia, and the Middle East.
- Growing focus on sustainable mining and green transformation.

INVESTMENT SNAPSHOT

- Increasing domestic and foreign investment interest.
- Government incentives for strategic mineral projects.
- ESG and environmental standards becoming a key priority.

OUTLOOK

With its rich resources, expanding infrastructure, and supportive policies, Türkiye is well-positioned to enhance its role in global mineral supply chains while advancing value-added production and sustainable growth.



KEY PLAYERS IN TÜRKİYE



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DISCUSSION 1

THE MINING LANDSCAPE OF TÜRKİYE – PART 1

Türkiye possesses a broad spectrum of mineral resources that support a wide range of industries, from construction and energy to high-tech manufacturing. With strong geological potential and strategic location, the country continues to attract both domestic and foreign investments.



STRATEGIC IMPORTANCE



ECONOMIC PILLAR

Mining contributes to industrial production, exports, employment, and regional development.



GEOGRAPHIC ADVANTAGE

Situated between major markets in Europe, Asia, and the Middle East.



INDUSTRIAL DEMAND

Rising domestic demand for raw materials drives sustainable growth.



SUSTAINABLE FOCUS

Transition towards environmentally responsible mining and green practices.

TÜRKİYE MINING SNAPSHOT



~110

 ACTIVE
MINING SITES


~5.3

 MILLION TONS
TOTAL PRODUCTION
(SELECTED MINERALS)


~85,000+

 PEOPLE EMPLOYED
(DIRECT & INDIRECT)


~1.6%

 CONTRIBUTION TO
GDP (EST.)

MAJOR MINING ACTIVITIES



EXPLORATION



PROCESSING



TRANSPORTATION



EXTRACTION



BENEFICIATION



EXPORT

TÜRKİYE'S KEY MINERAL WEALTH

BORON



Türkiye holds the world's largest boron reserves.

MAIN USES:

Glass, ceramics, detergents, agriculture, metallurgy

CHROMITE



High-quality reserves vital for stainless steel production.

MAIN USES:

Stainless steel, alloys, refractories

COPPER



Essential for electronics, construction, and energy.

MAIN USES:

Electrical, construction, infrastructure

LEAD & ZINC



Important base metals for industrial and manufacturing sectors.

MAIN USES:

Galvanization, batteries, metal alloys

IRON ORE



Abundant reserves supporting steel production.

MAIN USES:

Steel manufacturing, infrastructure

MARBLE & NATURAL STONE



World-renowned quality and variety.

MAIN USES:

Construction, decoration, architecture

PERLITE



Widely used in construction, agriculture, and industry.

MAIN USES:

Insulation, horticulture, construction

KEY CHALLENGES



Complex permitting and licensing processes



High energy costs and global price volatility



Infrastructure and logistics limitations



Environmental concerns and community impact

OUTLOOK

With the right policies, technology investments, and sustainable practices, Türkiye can strengthen its position as a leading mining hub in the region and beyond.



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DISCUSSION 1

THE MINING LANDSCAPE OF TÜRKİYE – PART 2

BUILDING A COMPETITIVE EDGE

Türkiye's mining sector combines natural resource wealth with strategic location, skilled workforce, and modern infrastructure. Continued investment, innovation, and sustainable practices will unlock greater value and global competitiveness.

KEY OPPORTUNITIES



INCREASING DEMAND

Rising global demand for minerals and metals creates long-term opportunities.



VALUE ADDITION

Expanding beneficiation and processing to move up the value chain.



GLOBAL MARKETS

Strong potential to increase exports and access new international markets.



TECHNOLOGY & INNOVATION

Adoption of advanced technologies for higher efficiency and sustainability.

TÜRKİYE MINING INFRASTRUCTURE



ROAD NETWORK

~70,000 km

providing access to major mining areas



RAIL NETWORK

~13,000 km

connecting industrial hubs and ports



PORTS

20+

major seaports enhancing export capabilities



ENERGY SUPPLY

Stable and growing energy capacity to support industrial needs

SUSTAINABILITY IN FOCUS



- ✓ Implementing environmental management systems
- ✓ Rehabilitation and land restoration projects
- ✓ Efficient water and energy use
- ✓ Reducing emissions and promoting green mining
- ✓ Supporting local communities and social development

CHALLENGES TO ADDRESS



Complex permitting and regulatory processes can slow down new projects.



High production costs and global price volatility affect profitability.



Logistics constraints in remote areas increase transportation costs.



Need for continuous investment in human resources and safety.



Balancing resource development with environmental protection.



TOP MINERAL EXPORT MARKETS (2025)



Türkiye exports a wide range of minerals and natural stone products to more than 100 countries worldwide.

OUTLOOK

With its resource potential, strategic location, and dynamic industry, Türkiye is poised to strengthen its position as a reliable supplier of minerals and natural stone, while advancing towards sustainable and innovative mining practices.



The future of mining in Türkiye lies in innovation, sustainability, and global collaboration.





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DISCUSSION 2

MINERALS / CRITICAL MINERALS

PART 1

CRITICAL MINERALS: EXPORT RAW OR PROCESS LOCALLY?

The strategic question is no longer only what Türkiye can extract, but how much value it can retain. Processing, refining and advanced materials can deepen industrial capability, while raw exports offer speed, cash flow and market access. The balance will shape competitiveness.

transition towards environmentally responsible mining and green practices.



EXTRACTION



BENEFICIATION



EXPORT

TÜRKİYE'S KEY MINERAL WEALTH

BORON



Türkiye holds the world's largest boron reserves.

MAIN USES:

Glass, ceramics, detergents.

CHROMITE



High-quality reserves vital for stainless steel production.

MAIN USES:

Stainless steel, alloys.

COPPER



Essential for electronics, construction, and energy.

MAIN USES:

Electrical, construction.

LEAD & ZINC

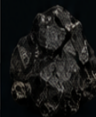


Important base metals for industrial and manufacturing sectors.

MAIN USES:

Galvanization, batteries.

IRON ORE



Abundant reserves supporting steel production.

MAIN USES:

Steel manufacturing.

MARBLE & NATURAL STONE

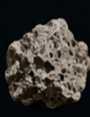


World-renowned quality and variety.

MAIN USES:

Construction, decoration.

PERLITE



Widely used in construction, agriculture, and industry.

MAIN USES:

Insulation, horticulture.

STRATEGIC MINERALS IN FOCUS

TÜRKİYE'S KEY

BORON



BORON

Strong reserve base

Glass • ceramics • clean energy

MINERAL WEALTH

CHROMITE



CHROMITE

Established production

Stainless steel • alloys

COPPER



COPPER

High strategic demand

Power • grids • renewables

LEAD & ZINC



RARE EARTHS

Exploration & development

Magnets • electronics • EVs

IRON ORE



LITHIUM

Emerging potential

Batteries • storage

TÜRKİYE'S KEY

BORON



TUNGSTEN

Industrial importance

Hard metals • aerospace

WHERE VALUE IS CREATED

1

MINE

Resource extraction

→

CONCENTRATE

Sorting & beneficiation

→

REFINE

Purity & chemical processing

4

ADVANCED MATERIALS

Specialty compounds & alloys

→

COMPONENTS

Industrial integration

→

EXPORT

Global customers

CORE CHOICE

Raw exports maximize speed. Local processing maximizes retained value — but requires capital, energy, technology and scale.

RAW EXPORT vs LOCAL PROCESSING

RAW EXPORT

- Faster route to market
- Lower capital intensity
- Immediate export revenue
- Greater exposure to global markets

LOCAL PROCESSING

- Higher value per ton
- More skilled employment
- Deeper industrial ecosystem
- Needs scale, power & technology

THE STRATEGIC BALANCE

The winning model may differ by mineral: process locally where Türkiye can build scale and technology; export selectively where markets reward speed and flexibility.

PAGE 07 → PART 2 LOCAL PROCESSING • INVESTMENT • TECHNOLOGY • GLOBAL SUPPLY CHAINS

Next: What would it take to move from mineral supplier to value-chain partner?

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DISCUSSION 2

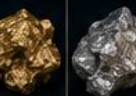
CRITICAL MINERALS & STRATEGIC IMPORTANCE – PART 2

RESOURCES THAT POWER THE FUTURE

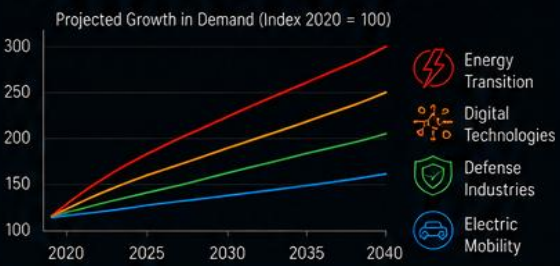
Türkiye is rich in a variety of critical minerals that are essential for modern industries, advanced technologies, and the green transition. Developing the full potential of these resources will strengthen Türkiye's industrial base and reduce dependency on imports.



TÜRKİYE'S KEY CRITICAL MINERALS

BORON  World leader with 72% of global reserves.	CHROMIUM  Among top global producers; vital for stainless steel.	LIGNITE  Major domestic energy resource with high potential.	MARBLE  High-quality reserves for construction and decoration.	FELDSPAR  Important for ceramics, glass, and industrial applications.	
BAUXITE  Raw material for aluminum; strategic for lightweight industries.	LEAD & ZINC  Significant reserves supporting metal and mining industries.	COPPER  Key for electrical systems, energy, and construction.	RARE EARTH ELEMENTS  Essential for high-tech, defense, and renewable energy technologies.	GOLD  High economic value with growing exploration investments.	SILVER  Industrial and investment value with wide usage potential.

GLOBAL DEMAND FOR CRITICAL MINERALS



WHY IT MATTERS

-  Critical minerals are the backbone of green energy, electric mobility, digital technologies, and defense industries.
-  Global competition for these resources is intensifying; securing supply chains is a national priority.
-  Value-added processing and advanced refining will unlock higher economic returns.
-  Strategic partnerships and responsible mining practices will ensure long-term sustainability.

SELECTED MINERAL RESERVES IN TÜRKİYE (approx.)

MINERAL	RESERVES	UNIT	GLOBAL RANK / POSITION
Boron	3.5	Billion tonnes	World Leader (%72 of global reserves)
Chromium	1.3	Billion tonnes	Top 10 Global Reserves
Lignite	15.0	Billion tonnes	Major Regional Resource
Marble (block)	2.0	Billion m ³	Top Exporting Countries
Bauxite	350	Million tonnes	High Potential
Lead & Zinc	2.0	Million tonnes	Significant Reserves
Copper	50	Million tonnes	Growing Potential
Gold	450	Tonnes	Active Exploration
Rare Earths	694	Thousand tonnes	High Potential

Sources: MTA (Mineral Research & Exploration General Directorate), TÜİK, USGS, Industry Reports

FROM RESOURCES TO VALUE



INVESTMENT & DEVELOPMENT FOCUS AREAS

-  Advanced exploration technologies
-  Sustainable and responsible mining
-  Local processing and refining capacity
-  R&D and innovation in mineral technologies
-  Skilled workforce and technical education
-  International cooperation and investment



“

Türkiye's critical minerals are not only a national asset, but also a strategic contribution to the world's sustainable future.

”

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DISCUSSION 3

NATURAL STONE & MARBLE
INDUSTRY IN TÜRKİYE – PART 1

A WORLD-CLASS HERITAGE

With its rich geological structure and thousands of years of stone craftsmanship, Türkiye is one of the world's most important centers for natural stone and marble. The sector combines traditional expertise with modern technology, serving global markets with high-quality products.

TÜRKİYE'S NATURAL STONE STRENGTHS



RICH VARIETY

A wide range of marbles, limestones, travertines, onxy, and granites in various colors and textures.



PREMIUM QUALITY

High-quality and durable stones suitable for luxury projects and long-term use.



GLOBAL REACH

Exported to over 100 countries across Europe, Asia, North America, and beyond.



SKILLED WORKFORCE

Generations of craftsmanship combined with modern processing capabilities.



ADVANCED CAPABILITIES

Modern quarries, state-of-the-art processing plants, and high production capacity.



SUSTAINABILITY FOCUS

Responsible quarrying and eco-friendly production for a greener future.

MAJOR NATURAL STONE RESOURCES

STONE TYPE		MAIN REGIONS		KEY FEATURES	
	MARBLE	Afyon, Bilecik, Denizli, Muğla, Isparta		Variety of colors and patterns, high market demand	
	TRAVERTINE	Denizli, Aydın, Sivas, Mersin		Widely used in construction and landscaping	
	LIMESTONE	Balıkesir, Bursa, Kütahya, Eskişehir		Ideal for cement, construction, and industrial use	
	ONYX	Isparta, Afyon, Denizli		Unique translucent beauty for premium projects	
	GRANITE	Muğla, Antalya, Kütahya		Highly durable, preferred for monuments and exterior applications	

EXPORT PERFORMANCE



EXPORT VOLUME (2025)

~2.1

MILLION TONS



EXPORT VALUE (2025)

~2.6

BILLION USD



ANNUAL GROWTH

5-7%

AVERAGE (LAST 5 YEARS)



MAIN MARKETS

USA, CHINA, INDIA,
ITALY, SPAIN, GERMANY,
FRANCE, UAE

KEY APPLICATION AREAS

ARCHITECTURE &
INTERIOR DESIGNCONSTRUCTION
PROJECTSLANDSCAPING &
OUTDOOR SPACESMONUMENTS &
ARTWORK

NATURAL STONE PRODUCTION PROCESS



QUARRYING
Careful extraction
from quality
quarries.



BLOCK CUTTING
Advanced machines
cut blocks with
precision.



PROCESSING
Slabs, tiles, and
custom products
are processed.



QUALITY CONTROL
Rigorous inspection
ensures premium
standards.



PACKAGING & EXPORT
Secure packaging
and global
delivery.

CHALLENGES TO OVERCOME

- ⚠️ High energy and production costs.
- ⚠️ Skilled labor shortage in certain regions.
- ⚠️ Environmental compliance and sustainability.
- ⚠️ Global competition and price volatility.
- ⚠️ Need for more innovation in design and marketing.

“ From ancient heritage to modern innovation,
Türkiye's natural stone industry builds beauty that lasts forever. ”

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DISCUSSION 3

NATURAL STONE IN TÜRKİYE – PART 2

A LEGACY OF STONE, A FUTURE OF VALUE

Türkiye is one of the world's richest countries in natural stone resources. With a combination of geological diversity, modern production, and skilled craftsmanship, Turkish natural stone brings beauty and durability to projects around the globe.



TÜRKİYE'S PREMIUM NATURAL STONES

MARBLE

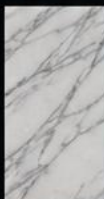
TRAVERTINE

LIMESTONE

ONYX

GRANITE

BASALT



Wide range of colors and patterns. Ideal for luxury interiors and architectural projects.



Timeless beauty and versatile applications for indoor and outdoor uses.



Perfect for cladding, flooring, and wall covering with natural elegance.



Translucent and unique formations for exclusive designs.



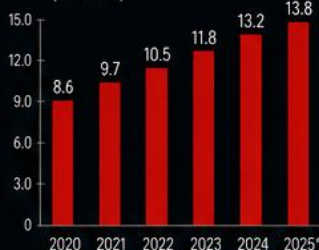
Extreme hardness and durability for high-traffic areas and demanding projects.



Strong, durable, and ideal for landscaping, paving, and infrastructure.

PRODUCTION & EXPORT PERFORMANCE

NATURAL STONE PRODUCTION
(Million m³)



*2025 data is annualized based on first 6 months.



EXPORT VALUE 2025*
2.1+
BILLION USD



EXPORT VOLUME 2025*
6.5+
MILLION TON



MAJOR EXPORT MARKETS
USA, China, India,
Italy, Spain, Germany,
Iraq, UAE, France



AVG. ANNUAL GROWTH
(2020–2024)
+11.3%

WHY CHOOSE NATURAL STONE FROM TÜRKİYE?



SUPERIOR
QUALITY

High standards and consistent quality control.



DIVERSE
RESOURCES

Wide variety of stone types and unique colors.



EXPERIENCED
WORKFORCE

Skilled labor and traditional stone craftsmanship.



ADVANCED
TECHNOLOGY

Modern quarries and processing facilities.



SUSTAINABLE
PRACTICES

Environmentally responsible extraction and production.

APPLICATIONS ACROSS INDUSTRIES

LUXURY RESIDENTIAL



COMMERCIAL BUILDINGS



HOTELS & RESORTS



PUBLIC INFRASTRUCTURE



LANDSCAPING



MONUMENTS & HERITAGE



FROM QUARRY TO PROJECT



EXPLORATION
& QUARRYING

Responsible extraction from rich reserves.



CUTTING
& BLOCKING

Advanced equipment for precise cutting.



PROCESSING
& FINISHING

Polishing, honing, and finishing to perfection.



QUALITY
CONTROL

Rigorous testing ensures global standards.



PACKAGING &
SHIPPING

Secure packaging and on-time delivery.



ABUNDANT RESERVES, STRATEGIC ADVANTAGE

- ✓ Over 1.2 billion m³ of natural stone reserves.
- ✓ More than 400 types of natural stone.
- ✓ Quarries located close to major ports.
- ✓ Competitive costs with high value creation.



KEY STONE PRODUCING REGIONS

- Marmara Region: Marble, Granite, Limestone
- Aegean Region: Marble, Travertine, Onyx
- Central Anatolia: Travertine, Limestone
- Mediterranean Region: Marble, Limestone
- Southeastern Anatolia: Basalt, Limestone



Nature creates the stone, we bring it to life. Türkiye's natural stone builds iconic spaces and timeless beauty worldwide.



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DISCUSSION 4

INVESTMENT & TECHNOLOGY IN TÜRKİYE'S MINING SECTOR - PART 1



INVESTING TODAY, LEADING TOMORROW

Türkiye offers a unique combination of rich mineral resources, strategic location, modern infrastructure, and government support that make it an attractive destination for mining investments.

ATTRACTIVE INVESTMENT ENVIRONMENT



STABLE LEGAL FRAMEWORK

Strong mining laws and transparent regulations protect investors.



GOVERNMENT SUPPORT

Incentives, tax advantages, and investment-friendly policies.



STRATEGIC LOCATION

Bridge between Europe, Asia, and the Middle East markets.



SKILLED & EXPERIENCED WORKFORCE

Qualified engineers and technicians powering the sector.

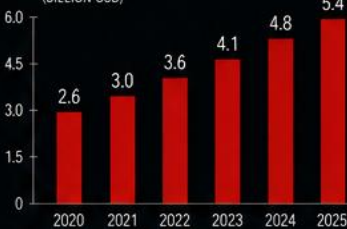


MODERN INFRASTRUCTURE

Developed transport, energy, and logistics networks ensure smooth operations.

MINING INVESTMENTS IN TÜRKİYE (EST.)

INVESTMENT VOLUME (BILLION USD)



*2025 data is annualized based on first 6 months.



TOTAL INVESTMENT VOLUME 2025*

5.4
BILLION USD



AVERAGE ANNUAL GROWTH (2020-2024)
+16.1%



ACTIVE MINING INVESTMENT PROJECTS
150+

PRIORITY MINERAL INVESTMENT AREAS

METALLIC MINERALS



Copper, Lead, Zinc, Chromium, Iron, Manganese

INDUSTRIAL MINERALS



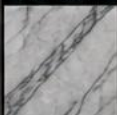
Boron, Feldspar, Barite, Bentonite, Perlite

ENERGY MINERALS



Lignite, Hard Coal, Uranium, Rare Earth Elements

NATURAL STONE & MARBLE



Marble, Travertine, Limestone, Onyx and more

PRECIOUS METALS



Gold, Silver and associated metals

TECHNOLOGY DRIVING THE FUTURE OF MINING

AUTOMATION & DIGITALIZATION



Smart mines, IoT sensors, real-time monitoring, and data analytics improve efficiency and safety.

ADVANCED EXPLORATION



Drones, 3D mapping, and AI-based exploration reduce risks and discover new resources.

SUSTAINABLE TECHNOLOGIES



Renewable energy integration, water recycling, and low-emission technologies minimize impact.

MODERN PROCESSING



High-efficiency crushing, grinding, flotation and beneficiation technologies.

EQUIPMENT & INNOVATION



Latest generation machinery ensures higher productivity and lower operating costs.

GOVERNMENT INCENTIVES FOR INVESTORS



- ✓ VAT exemption on machinery and equipment imports
- ✓ Customs duty exemption
- ✓ Corporate tax incentives
- ✓ Support for R&D and innovation projects
- ✓ Land allocation and infrastructure support
- ✓ Environmental and social responsibility guidance

SUCCESSFUL INVESTMENT PROJECTS

COPPER MINE EASTERN ANATOLIA



High-grade copper deposit with modern processing facility.

GOLD MINE WESTERN ANATOLIA



Advanced technology plant producing doré gold.

BORON PROJECT CENTRAL ANATOLIA



World-class boron processing and R&D center.

MARBLE QUARRY MARMARA REGION



Premium quality marble exported to global markets.

RISK MANAGEMENT & SUSTAINABILITY



OPERATIONAL SAFETY
Strict safety standards and continuous training.



ENVIRONMENTAL PROTECTION
Responsible mining with minimal environmental footprint.



COMMUNITY ENGAGEMENT
Supporting local communities and creating shared value.



TRANSPARENT GOVERNANCE
Ethical practices and compliance with international standards.

WHY INVEST IN TÜRKİYE?

- ✓ Abundant and diverse mineral resources
- ✓ Strong economic growth and market potential
- ✓ Skilled workforce and technical expertise
- ✓ Favorable investment climate and incentives
- ✓ Commitment to sustainability and innovation
- ✓ Gateway to global markets

“

Türkiye's mining sector is built on resources, powered by technology, and driven by sustainable growth.

”

STRONG RESOURCES. SMART INVESTMENTS. SUSTAINABLE FUTURE.

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DISCUSSION 4

INVESTMENT & TECHNOLOGY IN TÜRKİYE'S MINING SECTOR - PART 2

INNOVATION TODAY, COMPETITIVENESS TOMORROW

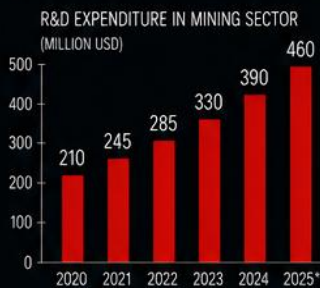
Technology and innovation are transforming the mining industry worldwide. Türkiye is investing in smart solutions and advanced technologies to increase efficiency, safety, and sustainability in mining operations.



TECHNOLOGICAL TRENDS TRANSFORMING MINING

DIGITAL MINING	AUTOMATION & ROBOTICS	IoT & SMART SENSORS	GREEN TECHNOLOGY	3D MODELING & SIMULATION	CYBERSECURITY & DATA SAFETY
Real-time data analytics and predictive modeling for smarter decisions.	Automated equipment and robots enhance productivity and safety.	Connected sensors monitor operations, equipment, and environment.	Cleaner energy solutions and low-carbon technologies reduce impact.	Advanced modeling optimizes design, planning, and production.	Protecting critical data and systems in a connected mining world.

R&D AND INNOVATION INVESTMENTS IN TÜRKİYE



- FOCUS AREAS**
Automation, energy efficiency, environmental protection, advanced materials, and data analytics.
- STRONG COLLABORATION**
Universities, research centers, and private companies working together for innovation.
- GLOBAL COMPETITIVENESS**
Innovation-driven growth increases Türkiye's global mining competitiveness.

SMART MINING APPLICATIONS

DRONES FOR SURVEY & MAPPING	REAL-TIME MONITORING SYSTEMS
Accurate mapping and monitoring reduce time and costs.	Instant data and alerts improve efficiency and safety.
AUTOMATED EQUIPMENT	REMOTE OPERATIONS
Automation reduces human risk and increases productivity.	Operate equipment remotely from safe control centers.

SUSTAINABLE MINING FOR THE FUTURE

	RESOURCE EFFICIENCY Maximizing resource use and minimizing waste.
	WATER MANAGEMENT Advanced water treatment and recycling systems.
	RECLAMATION & BIODIVERSITY Rehabilitation of mined areas and protection of ecosystems.
	SOCIAL RESPONSIBILITY Creating value for local communities and future generations.

“Mining today with responsibility, for a sustainable tomorrow.”

TECHNOLOGY PARTNERS & SOLUTIONS

	Advanced mining equipment and automation solutions.
	Drilling, crushing, and cutting technologies for higher efficiency.
	Innovative solutions for sustainable productivity.
	Digital solutions and smart mining technologies.
	Automation and electrification for the mining industry.
	Software solutions for modeling and optimization.

INVESTMENT INCENTIVES & OPPORTUNITIES

TAX INCENTIVES	CUSTOMS DUTY EXEMPTIONS	GOVERNMENT SUPPORT	STRATEGIC LOCATION	EXPORT POTENTIAL
Corporate tax reductions and VAT exemptions for investments.	Exemptions on machinery and equipment imports.	Grants, low-interest loans, and investment support programs.	Bridge between Europe, Asia, and the Middle East.	Access to global markets with competitive advantages.

TÜRKİYE MINING SECTOR AT A GLANCE

	Mineral resources: 90+ types
	Mining companies: 1,500+
	Direct employment: 200,000+
	Annual mineral production value: 10+ billion USD
	Export to 180+ countries

INVEST IN THE FUTURE



“Strong resources, advanced technology, and strategic vision make Türkiye a rising star in global mining investments.”



TECHNOLOGY DRIVES PROGRESS. INVESTMENTS BUILD THE FUTURE.



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GSR ANALYTIX

OPPORTUNITIES & CONNECTIONS POWERING GLOBAL GROWTH



“

Strong resources.
Smart investments.
Sustainable future.
Türkiye leads
the way.

”

Türkiye is more than a resource-rich country.

It is a strategic partner for global businesses, offering unique opportunities, strong connections, and a future-focused mining sector.



STRATEGIC PARTNER

A reliable bridge between resources and markets.



GLOBAL CONNECTIONS

Access to international markets and networks.



SUSTAINABLE GROWTH

Investing in long-term value and innovation.



MUTUAL SUCCESS

Working together for a stronger tomorrow.



TÜRKİYE'S MINING SECTOR STRENGTHS



RICH MINERAL DIVERSITY

Over 90 types of minerals with high economic value.



STRATEGIC LOCATION

A natural hub between Europe, Asia, the Middle East, and Africa.



STRONG INFRASTRUCTURE

Modern mining operations and well-developed transport networks.



SKILLED WORKFORCE

Experienced engineers and technicians driving excellence.

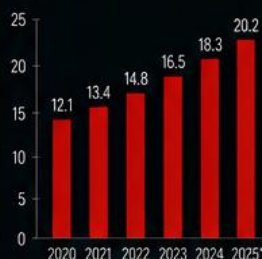


SUSTAINABLE COMMITMENT

Responsible mining practices for a greener and better environment.

TÜRKİYE MINING SECTOR OUTLOOK

MINING SECTOR GROWTH PROJECTIONS (BILLION USD)



*2025 data is estimated.

- ✓ Increasing global demand for minerals.
- ✓ Expansion of processing and value-added production.
- ✓ Growth in exports to 180+ countries.
- ✓ Rising investments in technology and innovation.
- ✓ Strong government support and incentive programs.

OUR SERVICES FOR THE MINING INDUSTRY



MARKET INTELLIGENCE

In-depth analysis and reports for better decision-making.



INVESTMENT CONSULTING

Identifying opportunities and maximizing returns.



PROJECT DEVELOPMENT

From exploration to operation, we support your projects.



TECHNOLOGY SOLUTIONS

Connecting you with advanced technologies and equipment.



GLOBAL NETWORKING

Building strong connections with key players worldwide.

SUCCESS IS BUILT ON COLLABORATION



“ We believe in partnerships that create value, drive innovation, and build a sustainable future for generations to come. ”

RECENT MINING INVESTMENTS IN TÜRKİYE (EXAMPLES)

COPPER PROJECT EASTERN ANATOLIA



State-of-the-art processing facility investment.

GOLD PROJECT WESTERN ANATOLIA



Advanced technology plant producing doré gold.

BORON PROJECT CENTRAL ANATOLIA



New boron processing and R&D center investment.

MARBLE QUARRY MARMARA REGION



High-capacity quarry expansion for global supply.

LET'S CONNECT



We connect Türkiye's mining potential with the world.
Let's build a stronger, more sustainable, and successful future together.



GLOBAL REACH

We work with partners and clients in more than 180 countries.



180+
COUNTRIES



1,500+
COMPANIES



50+
INDUSTRIES



10+
YEARS EXPERIENCE

WHY WORK WITH GSR ANALYTIX?

- ✓ Global perspective, local expertise
- ✓ Data-driven insights and solutions
- ✓ Results-oriented and client-focused
- ✓ Integrity, transparency, and trust
- ✓ Your growth is our mission



VALUE BEYOND MINING



We go beyond mining.



We provide business consulting across multiple sectors to empower sustainable growth and long-term success.

TOGETHER, WE MINE **TODAY** FOR A BETTER **TOMORROW**.