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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.*

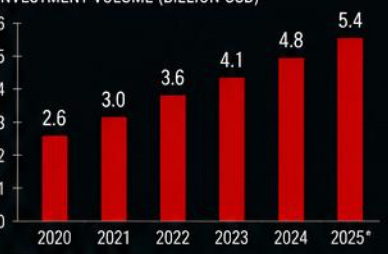
TÜRKİYE'S MINERAL DIVERSITY

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)



*2025 data is estimated.

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.



COUNTRY OVERVIEW

INSIDE TURKIYE'S MINING ECONOMY

RESOURCES, INDUSTRY AND MARKET ACCESS

A STRATEGIC RESOURCE BASE

Turkiye connects a diverse geological endowment with established manufacturing, construction, logistics and export networks.



The sector includes metallic minerals, industrial minerals, energy raw materials, natural stone, extraction services, machinery, processing and rehabilitation. Its future competitiveness depends on better exploration, higher-value processing, operational safety and reliable environmental performance.

01 GEOLOGICAL DIVERSITY

A wide resource mix supports construction, ceramics, glass, steel, chemicals, energy and advanced manufacturing. Exploration quality remains the starting point for investment.

02 INDUSTRIAL DEMAND

Domestic manufacturing creates a natural customer base for copper, chromium, boron products, feldspar, aggregates and processed stone. Linkages can retain more value locally.

03 EXPORT REACH

Ports, road corridors and proximity to Europe, the Middle East and North Africa support international sales. Consistency, certification and delivery reliability determine premium positioning.

04 NATURAL-STONE HERITAGE

Marble, travertine, limestone and other stones combine geological variety with centuries of craftsmanship. Design, branding and finished products can multiply value beyond block exports.

05 TECHNOLOGY TRANSITION

Automation, sensors, drones, modelling, electrification and advanced processing can improve productivity while reducing exposure to hazards and unnecessary resource loss.

06 RESPONSIBLE DEVELOPMENT

License discipline, transparent reporting, water and energy efficiency, land rehabilitation and community dialogue are essential operating capabilities rather than optional extras.

EDITORIAL VIEW

The strongest strategy is not simply to extract more. It is to understand the resource better, process selectively, sell reliably and restore responsibly.

Sources: MAPEG mining statistics and sector announcements; Ministry of Energy and Natural Resources; GSR Analytix assessment.

MARKET INTELLIGENCE

MINING SECTOR DASHBOARD

OFFICIAL INDICATORS AND OPERATING CONTEXT

SCALE, DIVERSITY AND RESPONSIBILITY

Official figures show a broad licensing base and a large workforce. They also show why investors must separate licensed areas, operating permits and genuinely active operations when evaluating market scale.



13,378

TOTAL MINING LICENCES

MAPEG, July 2026.

7,668

OPERATING-PERMIT LICENCES

MAPEG, July 2026.

4,375

ACTIVE OPERATIONS IN 2025

Across all licence groups.

140,039

MINING WORKERS IN 2024

Public and private employment.

$6B+

RECENT ANNUAL MINING EXPORTS

Sector statement for 2024/2025.

70 / 90

GLOBAL MINERAL TYPES FOUND

Official sector statement, 2025.

HOW TO READ THE NUMBERS

01 LICENCE BASE

A licence is a legal and administrative position; it is not identical to production. Project screening must confirm status, commodity, coordinates, permits and ownership.

02 OPERATIONAL BASE

Operating permits narrow the field, while annual active-operation data provide a more realistic picture of current production activity.

03 EMPLOYMENT

Workforce figures underline the importance of safety systems, technical training, contractor management and regional economic contribution.

Sources: MAPEG Maden Istatistikleri (July 2026); MAPEG Responsible Mining Summit, Dec. 2025. Figures rounded.

DISCUSSION 1

THE MINING LANDSCAPE OF TURKIYE

FROM EXPLORATION TO INDUSTRIAL USE



Turkiye's mining economy is geographically dispersed and industrially connected. Western regions combine metallic minerals, boron, natural stone and dense manufacturing networks. Central Anatolia is important for industrial minerals, boron and processing. Eastern and north-eastern regions hold metallic-mineral potential, while many provinces participate through quarrying, cement inputs, ceramics and stone processing.

01 MARMARA & AEGEAN

Strong ports, manufacturing clusters, marble and natural-stone production, metal processing and access to export logistics.

02 CENTRAL ANATOLIA

Boron, industrial minerals, machinery, rail connections and a growing role in processing and advanced-material development.

03 BLACK SEA BELT

Metallic-mineral potential, complex terrain and community-sensitive project conditions requiring careful logistics and environmental planning.

04 EASTERN ANATOLIA

Copper, gold and polymetallic prospects coexist with high-altitude infrastructure challenges and opportunities for regional investment.

05 MEDITERRANEAN

Chromium, industrial minerals, construction materials and port access support both domestic industry and external markets.

06 SOUTH-EAST

Growing infrastructure and industrial demand increase interest in construction materials, energy inputs and new exploration programmes.

PROJECT LENS

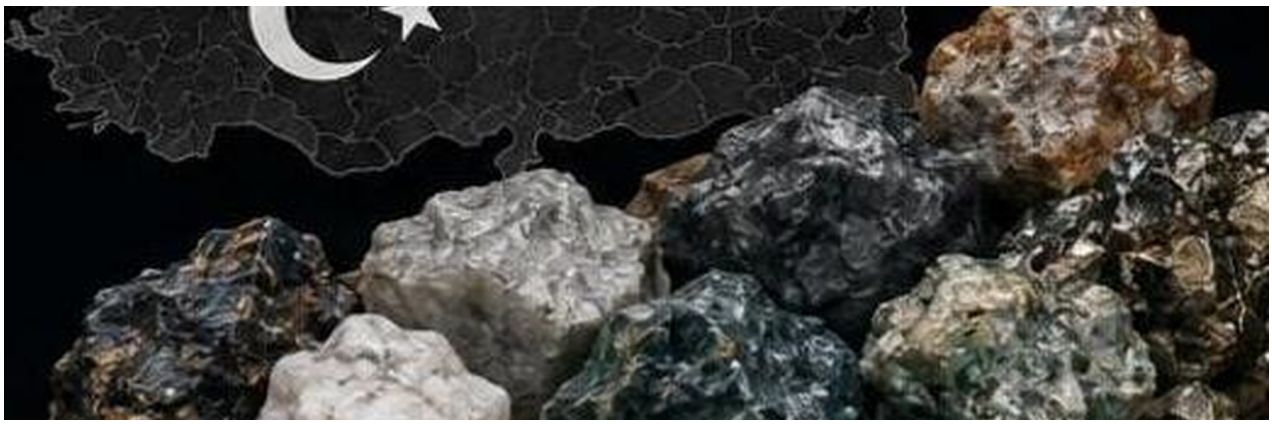
A strong deposit is only one part of a bankable project. Infrastructure, metallurgy, permitting, water, energy, workforce, community acceptance and market access must be tested together.

Sources: MTA and MAPEG public information; Ministry of Energy and Natural Resources; GSR Analytix regional assessment.

DISCUSSION 2

STRATEGIC MINERALS IN FOCUS

RESOURCES THAT POWER INDUSTRY



Criticality is not a permanent label. A mineral becomes strategic when supply concentration, import dependency, demand growth, defence or energy-transition needs and the difficulty of substitution create risk. Turkiye's opportunity is to connect geology with processing know-how and demanding end-use industries.

01 BORON

Global leadership in boron resources supports glass, ceramics, detergents, agriculture and advanced compounds. The commercial question is how far speciality products can extend downstream value.

02 COPPER

Power grids, electrification, electronics and construction keep copper strategically important. MTA reported 5.4 million tonnes of discovered metal-copper resources in 2025.

03 CHROMIUM

Turkiye has long-standing chromite production and trade. Stainless-steel and alloy demand make grade, beneficiation, energy cost and logistics central to competitiveness.

04 RARE EARTHS

Rare-earth potential attracts attention because magnets and advanced technologies depend on complex separation and refining. Resource definition and process capability matter more than headline tonnage.

05 GOLD & SILVER

Precious metals support export earnings and investment interest, but projects require rigorous metallurgy, water management, tailings governance and community engagement.

06 INDUSTRIAL MINERALS

Feldspar, perlite, bentonite, magnesite and other materials feed ceramics, glass, construction, filtration and specialised industrial applications.

STRATEGIC PRINCIPLE

Mineral policy should distinguish between fast raw-material sales and selective local processing. The right answer differs by ore quality, scale, power, water, technology and customer requirements.

Sources: Ministry of Energy and Natural Resources - Copper (MTA 2025); MAPEG; public MTA mineral information.

VALUE-CHAIN STRATEGY

FROM RESOURCE TO VALUE

RAW EXPORT, PROCESSING AND INDUSTRIAL INTEGRATION

THE CORE CHOICE

The strategic question is not only what can be extracted, but which stages Turkiye can perform competitively and safely.



01 EXPLORE

Geology, geophysics, drilling, sampling and reliable resource models reduce uncertainty before capital is committed.

02 MINE

Selective extraction, dilution control, safety and equipment productivity determine the quality and cost of feed.

03 BENEFICIATE

Crushing, grinding, sorting and concentration can upgrade material and reduce the cost of moving waste.

04 REFINE

Chemical and metallurgical processing may capture higher value but requires scale, energy, water, technology and strict controls.

05 MANUFACTURE

Components, engineered stone, compounds and industrial inputs deepen links with domestic and export customers.

06 RECOVER

Recycling, by-product recovery, waste reprocessing and circular design can extend resource productivity.

RAW EXPORT VS LOCAL PROCESSING

RAW EXPORT

Speed, lower capital intensity and immediate market access can be rational advantages. Exposure to commodity prices and limited retained value are the trade-offs.

LOCAL PROCESSING

Higher value per tonne, skilled jobs and supply-chain depth are possible when feed quality, scale, technology, utilities and customer demand are proven.

DECISION RULE

Process locally where Turkiye can build a defensible cost, quality or technology advantage. Export selectively where speed and flexibility create more value.

Source: GSR Analytix value-chain framework; sector context from MAPEG and the Ministry of Energy and Natural Resources.

DISCUSSION 3

NATURAL STONE & MARBLE

GEOLOGY, CRAFTSMANSHIP AND GLOBAL MARKETS



Turkiye's natural-stone industry combines large geological variety, established quarrying, processing knowledge and access to major markets. MAPEG reported an official sector statement of approximately 50 billion tonnes of natural-stone reserves and more than 650 marble varieties in 2025. The value opportunity lies in consistent quality, design, traceability, finished products and trusted delivery.

01 MARBLE

Colour, veining and finish create distinct architectural identities. Careful block selection and digital slab presentation help buyers manage variation.

02 TRAVERTINE

Recognisable texture and warm tones support flooring, cladding, landscaping and hospitality projects across indoor and outdoor applications.

03 LIMESTONE

A versatile material for architecture, facades, interiors and construction. Technical data and application guidance improve specification confidence.

04 ONYX

Translucency and dramatic patterning serve premium interiors and feature applications. Yield control and skilled fabrication are especially important.

05 GRANITE & BASALT

Durability supports paving, monuments, landscaping and demanding exterior uses. Performance documentation strengthens project selection.

06 ENGINEERED VALUE

Cut-to-size, book-matching, surface treatment, mosaics, furniture and design collaboration can outperform low-margin commodity positioning.

MARKET ADVANTAGE

Natural stone is sold twice: first as a material and then as confidence. Samples, digital imagery, testing, packaging, documentation and on-time logistics make the second sale possible.

Source: MAPEG, 30th Marble Izmir International Natural Stone and Technologies Fair announcement, April 2025.

NATURAL-STONE VALUE CHAIN

FROM QUARRY TO PROJECT

TURNING GEOLOGICAL VARIETY INTO SPECIFIED PRODUCTS

QUALITY IS A CHAIN OF DECISIONS

Every stage affects colour consistency, recovery, surface quality, delivery and buyer trust.



01 RESOURCE & BENCH PLANNING

Map variation, fractures, colour zones and recovery before extraction. Quarry plans should integrate safety, waste movement and future rehabilitation.

02 BLOCK EXTRACTION

Diamond wire, controlled cutting and handling practices protect block integrity and reduce avoidable damage.

03 SLAB PROCESSING

Sawing, resin treatment, polishing and calibration convert geological character into repeatable commercial products.

04 QUALITY ASSURANCE

Shade classification, dimensional checks, surface inspection, laboratory testing and traceable batches reduce disputes.

05 DESIGN COLLABORATION

BIM libraries, sample kits, mock-ups, technical advice and rapid visualisation help architects specify stone earlier.

06 PACKING & LOGISTICS

Crate design, moisture control, labelling, container planning and documentation protect value until final delivery.

BUYER QUESTIONS THAT MATTER

- ORIGIN & QUARRY
- TECHNICAL TESTS
- FINISH CONSISTENCY
- LEAD TIME
- PACKAGING
- AFTER-SALES

Sources: MAPEG natural-stone sector information; GSR Analytix quarry-to-project commercial framework.

DISCUSSION 4

INVESTMENT & REGULATORY LANDSCAPE

FROM LICENCE SCREENING TO BANKABLE PROJECTS



Mining investment requires a disciplined sequence: verify title and coordinates, understand the resource, test metallurgy, map permits and land access, define infrastructure, build a social and environmental baseline, and stress-test economics. Turkiye's 2025 legal changes increased the emphasis on defining reserves in three dimensions and strengthening exploration-project commitments.

01 LICENCE & TITLE

Confirm licence group, stage, ownership, boundaries, obligations, fees, royalties and any overlap with restricted areas. Never rely on presentation summaries alone.

02 RESOURCE CONFIDENCE

Review drilling, sampling, QA/QC, density, geological interpretation and classification. Independent technical review can prevent expensive assumptions.

03 METALLURGY & PRODUCT

Understand recovery, impurities, processing route, product specification, by-products and waste streams before choosing equipment or customers.

04 PERMITS & LAND

Environmental, forestry, pasture, land-use, water and operating approvals need an integrated schedule. Sequencing risk can affect the whole financing plan.

05 INFRASTRUCTURE

Power, water, roads, rail, ports, communications, camps and skilled contractors determine both capital cost and operational resilience.

06 MARKET & CONTRACTS

Price assumptions, logistics, customer qualification, penalties, payment terms and offtake flexibility must match the product and project stage.

INVESTOR DISCIPLINE

The correct question is not 'Is there a mine?' but 'Is there a technically credible, permitted, financeable and marketable project with acceptable environmental and social performance?'

Sources: MAPEG notices on Law No. 7554 and the 2025 draft Mining Regulation; GSR Analytix due-diligence framework.

INVESTMENT & TECHNOLOGY

SMART MINING: PRODUCTIVITY WITH CONTROL

DATA, AUTOMATION AND SAFER OPERATIONS



Digital mining is valuable when it improves a real operating decision. Sensors, fleet systems, drones, plant historians and geological models should share consistent data definitions and ownership. Technology projects succeed when operators, engineers, maintenance, safety and finance teams agree on the problem before selecting the tool.

01 DRONES & SURVEYING

Rapid mapping, stockpile measurement, slope observation and progress tracking improve visibility while reducing exposure in hazardous areas.

02 FLEET MANAGEMENT

Dispatch, payload, cycle-time and fuel data reveal bottlenecks. Benefits depend on accurate inputs, operator adoption and maintenance discipline.

03 PREDICTIVE MAINTENANCE

Condition monitoring and failure analysis can reduce unplanned downtime when alerts are connected to work orders, spares and accountability.

04 ORE SORTING

Sensors may reject waste earlier, improve feed quality and reduce downstream energy and water use. Testing must represent real variability.

05 REMOTE OPERATIONS

Control centres can centralise expertise and reduce exposure, but require resilient communications, cybersecurity and clear emergency procedures.

06 ENERGY & ELECTRIFICATION

Renewables, storage, efficient drives and electrified equipment can lower emissions and operating costs where duty cycles and infrastructure support them.

IMPLEMENTATION RULE

Start with a measurable operating problem, prove the data, run a controlled pilot, train users and scale only when the change is embedded in daily work.

Source: GSR Analytix mining-technology assessment; sector context from MAPEG and Ministry publications.

RESPONSIBLE MINING

OPERATE, ENGAGE, RESTORE

ENVIRONMENTAL PERFORMANCE AS A CORE CAPABILITY

RESPONSIBILITY BEGINS BEFORE MINING

Baseline studies, design choices and community dialogue determine how effectively impacts can be avoided, reduced and repaired.



01 WATER STEWARDSHIP

Build a site-wide water balance, separate clean and contact water, monitor quality, reduce withdrawals and plan for climate variability and closure.

02 TAILINGS & WASTE

Use risk-based design, independent review, instrumentation, emergency planning and transparent governance across the full facility life cycle.

03 LAND & BIODIVERSITY

Apply the mitigation hierarchy: avoid, minimise, restore and offset only where necessary. Progressive rehabilitation reduces long-term liability.

04 WORKER SAFETY

Critical controls, fatigue management, contractor standards, equipment isolation and learning from near misses must be visible in daily operations.

05 COMMUNITIES

Engage early, explain uncertainty honestly, maintain grievance mechanisms and track local procurement, employment and shared regional outcomes.

06 CLOSURE READINESS

Closure cost, landform design, water treatment, post-mining land use and financial assurance should be updated throughout operation.

13,000 HECTARES

MAPEG reported roughly 13,000 hectares of rehabilitated mine land by December 2025.

23.7 MILLION TREES

The same official statement reported 23.7 million trees planted on rehabilitated sites.

Source: MAPEG Responsible Mining Summit statement, 5 Dec. 2025; figures rounded. GSR Analytix operational framework.

OPPORTUNITIES & CONNECTIONS

FROM TURKIYE TO GLOBAL MARKETS

STRONG RESOURCES. SMART PARTNERSHIPS.

CONNECTING RESOURCES WITH MARKETS

GSR Analytix supports visibility, market understanding, partner discovery and strategic dialogue across mining, natural stone, machinery and related industries.



PARTNERSHIP OPPORTUNITIES

01 MARKET INTELLIGENCE

Country, commodity, competitor and customer analysis that turns broad interest into focused commercial questions.

02 PARTNER DISCOVERY

Structured identification of producers, buyers, distributors, technology providers, advisers and investment counterparts.

03 EXPORT POSITIONING

Sharper value propositions, sector visibility, market narratives and buyer-focused content for international outreach.

04 PROJECT VISIBILITY

Clear presentation of resource, capability, location, sustainability and partnership needs without replacing technical due diligence.

05 TECHNOLOGY DIALOGUE

Connections around machinery, processing, digital systems, safety, water, energy and operational improvement.

06 RESPONSIBLE GROWTH

Commercial development that recognises licensing, technical quality, community relationships and environmental performance.