

TURKEY AS THE GLOBAL LEADER IN BORON EXPORT & PRODUCTION



ETİ MİNE
THE LEADER IN THE WORLD BORON SECTOR

ETİ MINE

- **Date of Establishment: 1935**
 - 1935 -1998 ETİBANK
 - 1998 -2004 ETİ Holding A.Ş.
 - 2004 -..... **Eti Mine Works**
- **Main Field of Activity:** The production and sales of boron products.
- **Legal Status:** State owned company
- **Management Systems:**
 - Quality Management System TS-EN-ISO 9001: 2008
 - Environmental Management System TS-ISO-EN-14000
 - Occupational Health & Safety Management System TS-İSG-OHSAS 18001
 - General requirements for competence of test and calibration laboratories TS-EN ISO/IEC 17025



Boron Minerals

Following four minerals comprise around 90 % of commercially use.

Colemanite

Tincal

Ulexite

Kernite

Colemanite and tincal are the most widely-used boron minerals.

Turkey is the world's major source of colemanite.



World Boron Minerals Reserves



WORLD BORON SECTOR (2012)

Consumption

- 3.9 million tons

Production Capacity

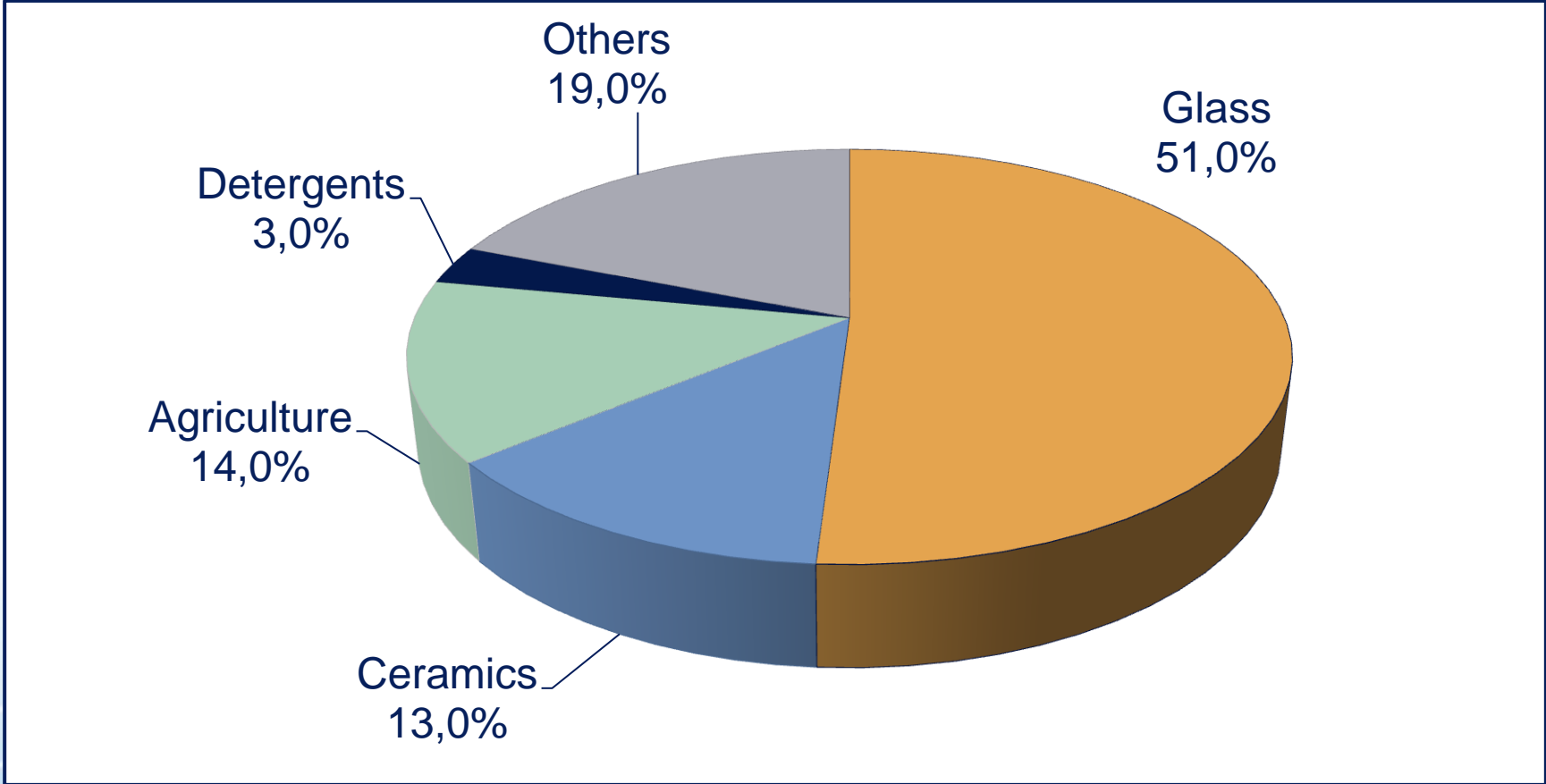
- 4.9 million tons

Production

- 4.1 million tons

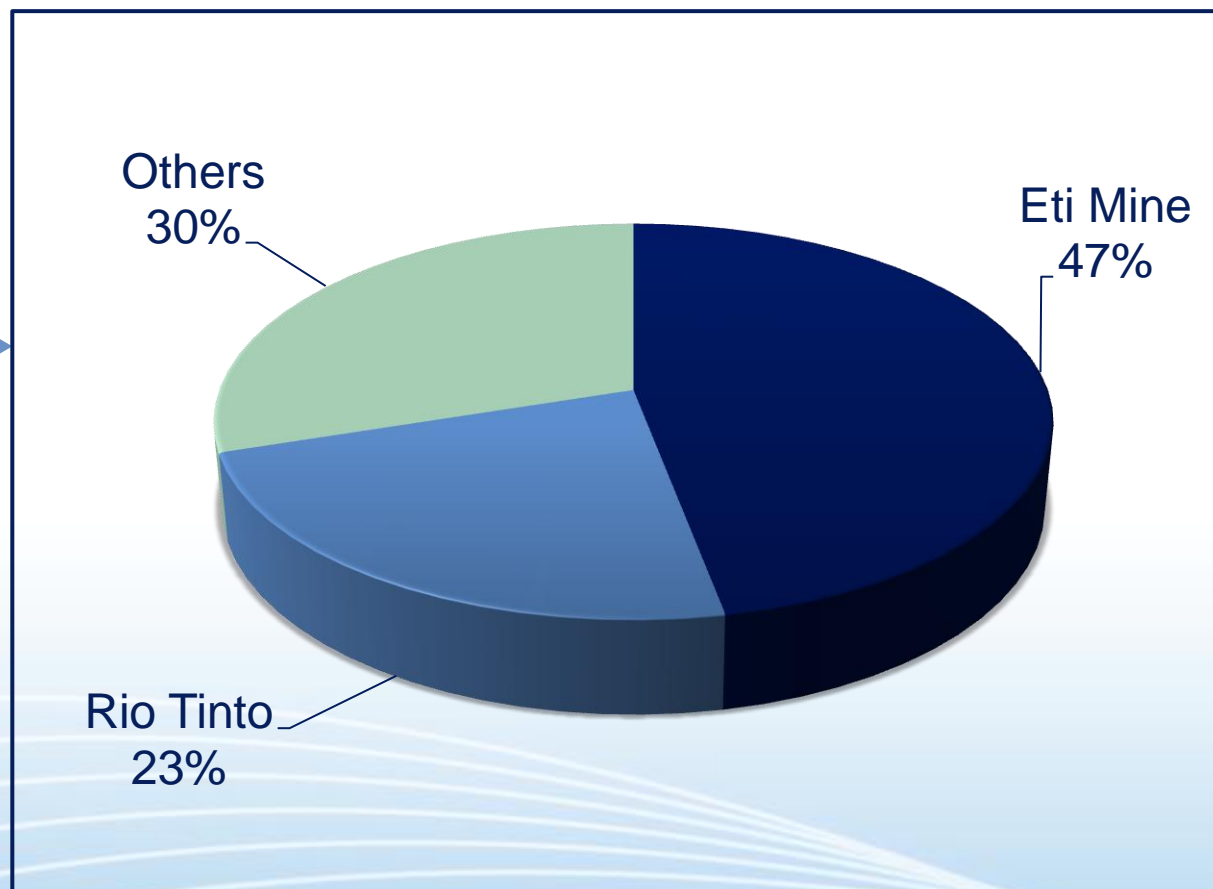


World Boron Consumption by End-Use in 2012



World Boron Market Shares, 2012

- Russia
- China
- South America



Mission & Vision



MISSION

- To utilize the national boron resources within the framework of sustainable development, and to serve these goods to all humanity by converting them into high quality value added boron products, thus to contribute to the nation's prosperity.



VISION

- To become an establishment which continues steady growth in traditional boron products market and takes a pioneering role in developing new boron products that make difference, and creates maximum added value from boron resources by making the country information and technology base of the world boron industry.

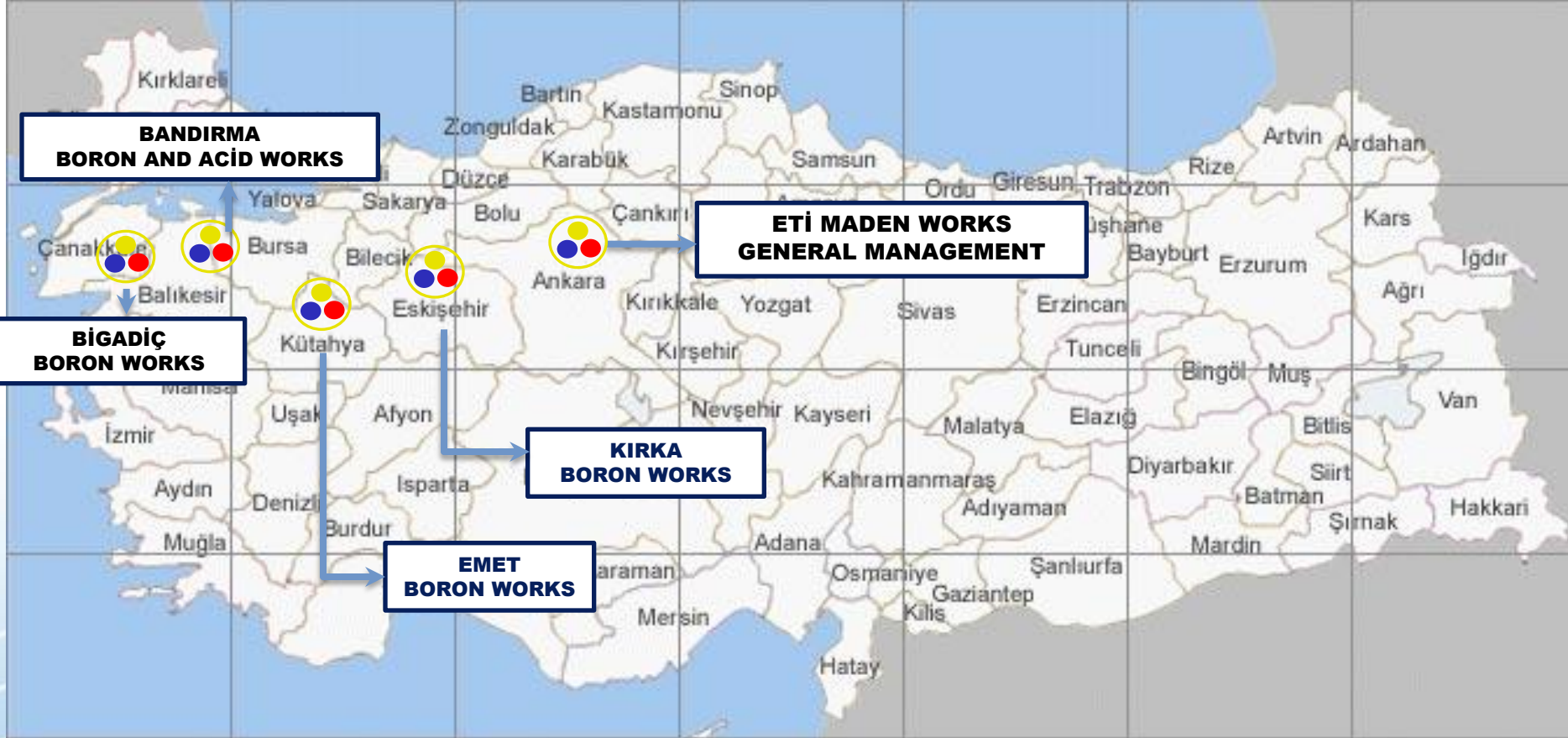


Boron Minerals Reserve of Eti Mine

BASIN NAME	AMOUNT (Tons)
EMET (Colemanite)	1.818.264.009
KIRKA (Tincal)	838.152.732
BİGADIÇ (Colemanite-Ulexite)	636.287.478
KESTELEK (Colemanite)	5.420.009
TOTAL	3.298.124.228



Production Sites of Eti Mine



Boron Products of Eti Mine

BANDIRMA BORON WORKS

- Borax Decahydrate
- Borax Pentahydrate
- Boric Acid
- Boron Oxide
- Etidot-67 (Agri Boron)
- Sodium Perborate

EMET BORON WORKS

- Boric Acid
- Concentrated Colemanite

KIRKA BORON WORKS

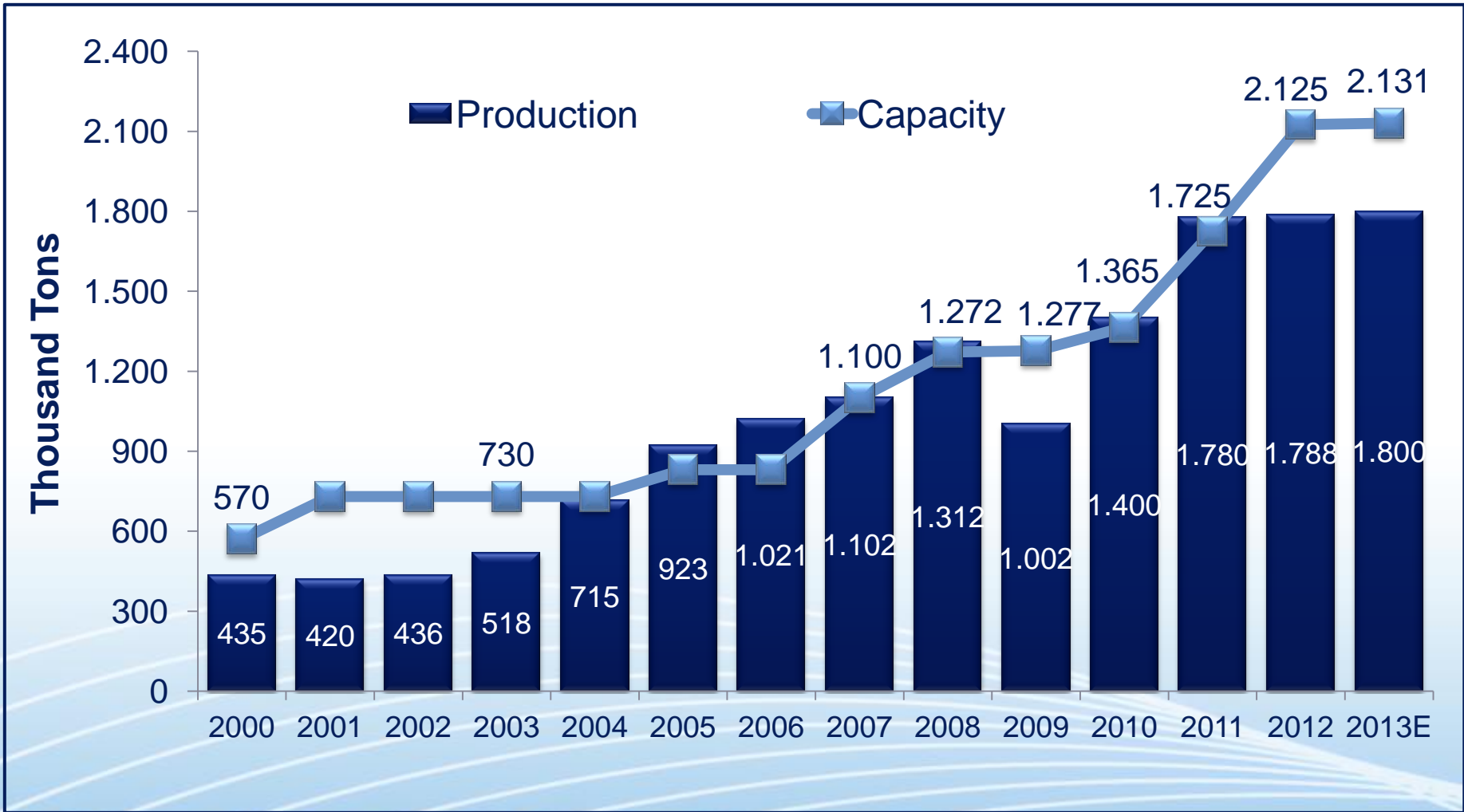
- Etibor-48 (Borax Pentahydrate)
- Etibor-68 (Anhydrous borax)
- Calcined Tincal (Compacted)

BİGADIÇ BORON WORKS

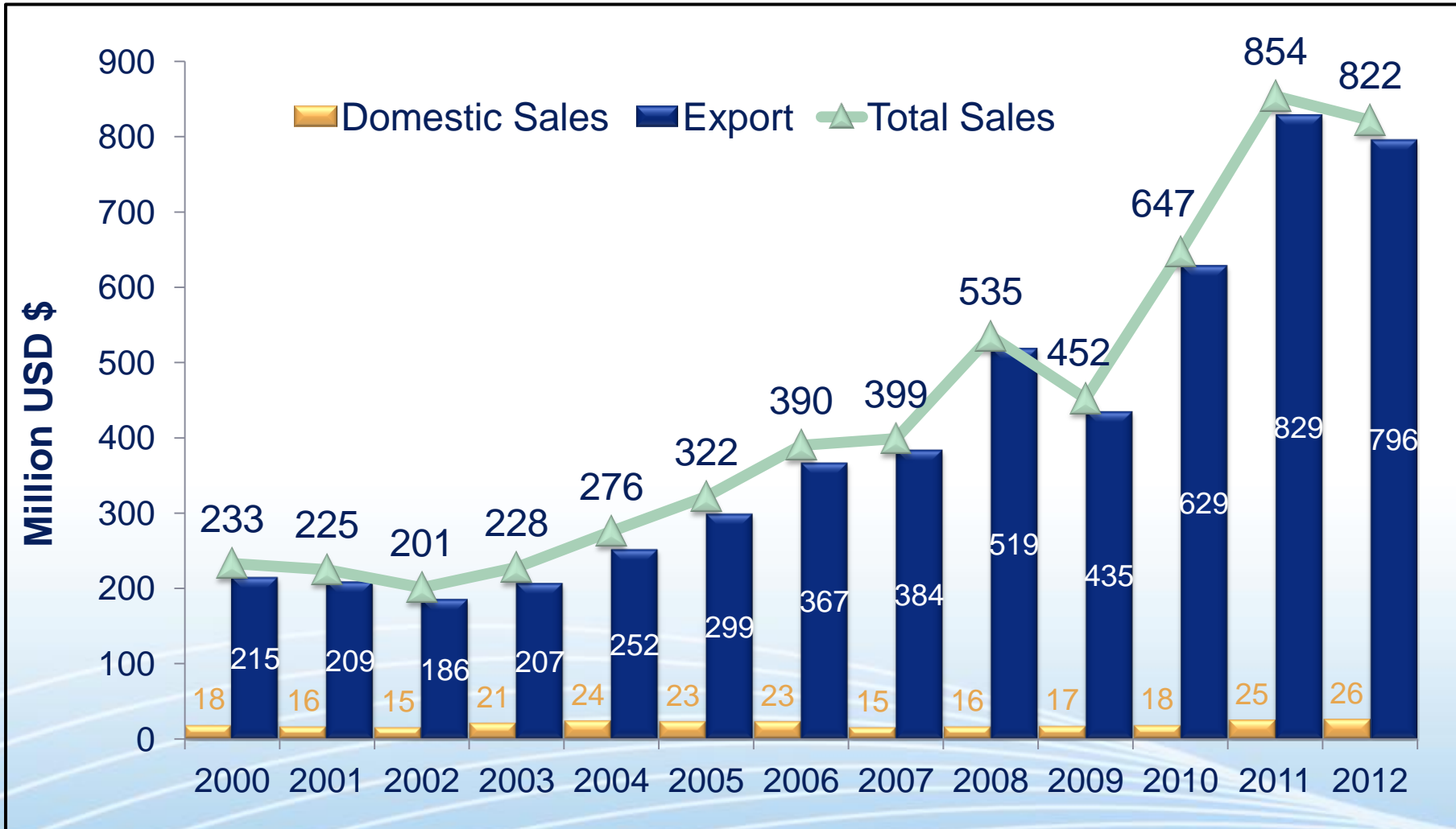
- Ground Colemanite / Ulexite
- Concentrated Colemanite / Tincal / Ulexite
- Natural Zeolite



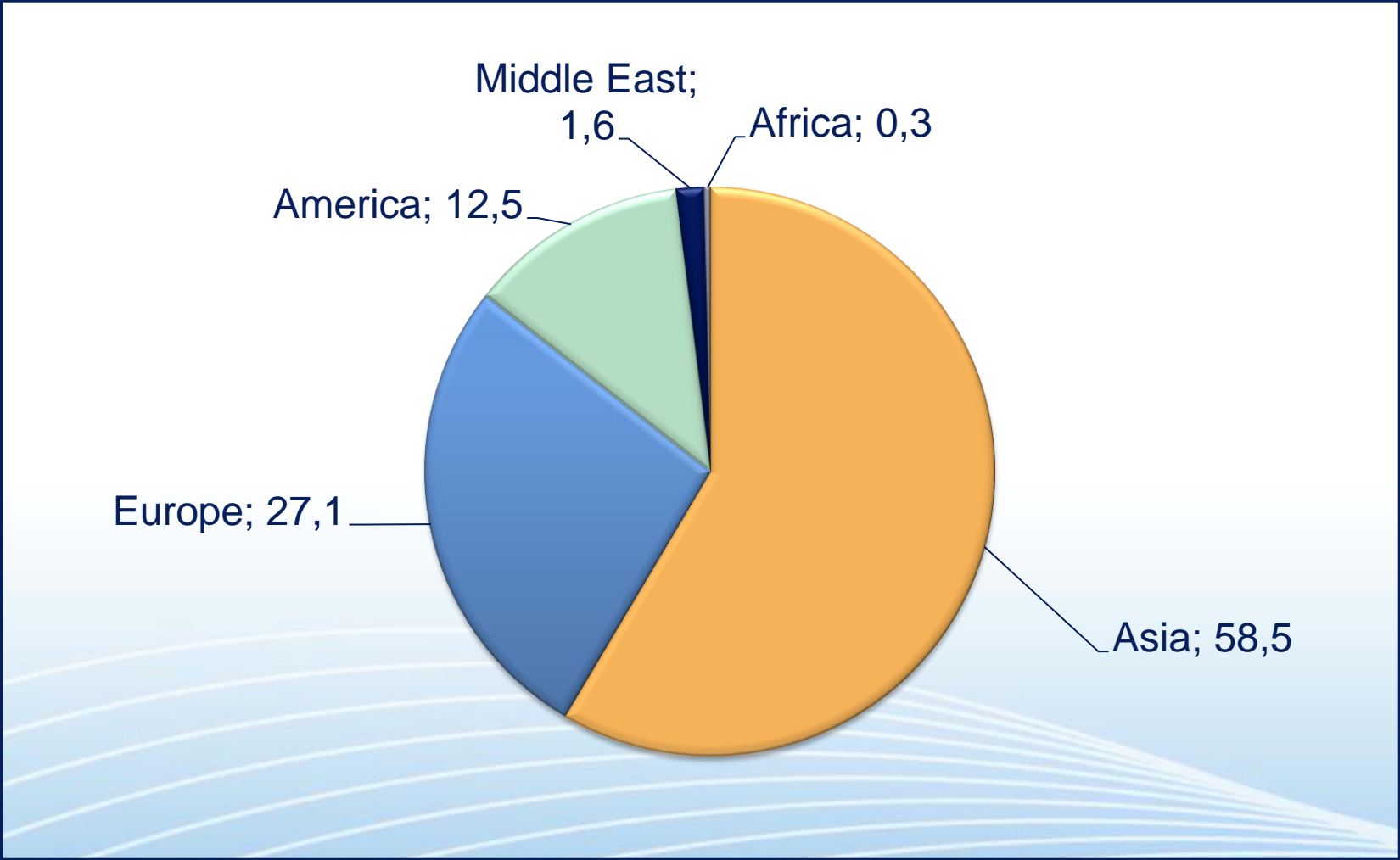
Eti Mine in Figures; Production & Capacity of Boron Products



Eti Mine in Figures; Sales



Regional Export of Eti Mine



Consumption of Boron Products in the World & Change in Eti Mine's Market Share

Consumption of Boron Products in the World (Million Tonnes)



Change in Eti Mine's Market Share



Eti Mine in Turkish Economy

2012 **TİM** TÜRKİYE İHRACATÇILAR MECLİSİ
TÜRKİYE'NİN İLK 1000 İHRACATÇI FİRMASI
AMONG TOP 1000 EXPORTERS OF TURKEY

Eti Mine is stated as 15th in export rank in the list of “Top 1000 Exporters of Turkey”



R & D Works

Strategy; Rather than waiting the growth of boron market, leading to develop market by finding new boron products and new usages.

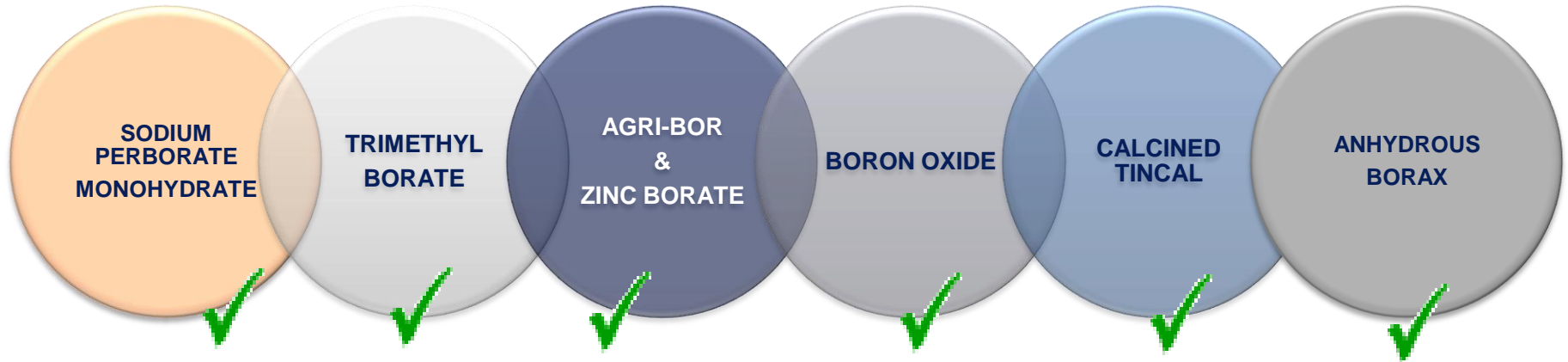
Aim;

- Increase production efficiency
- **Develop new usage areas**
- Develop new products
- **Contribute boron technology**

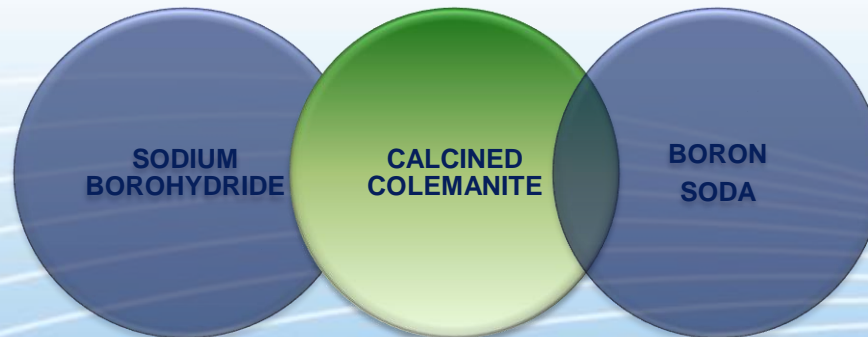


R & D Works

Completed projects



Ongoing projects



Targets of Strategic Plan



- PRODUCTION CAPACITY OF BORON CHEMICALS

2.1 MILLION TONS

Long Term Targets



- PRODUCTION CAPACITY OF BORON CHEMICALS

5.5 MILLION TONS

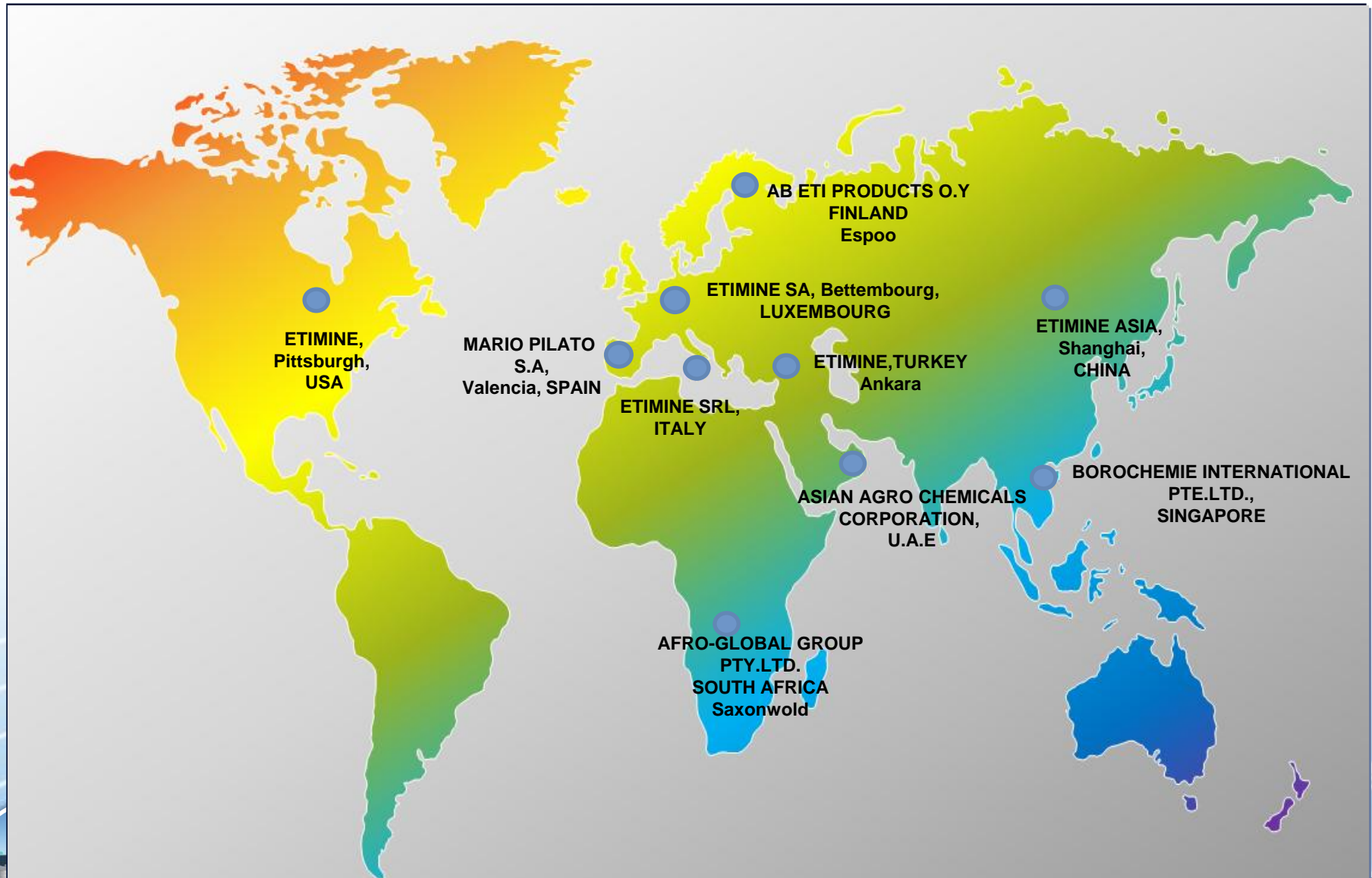


OUTLOOK

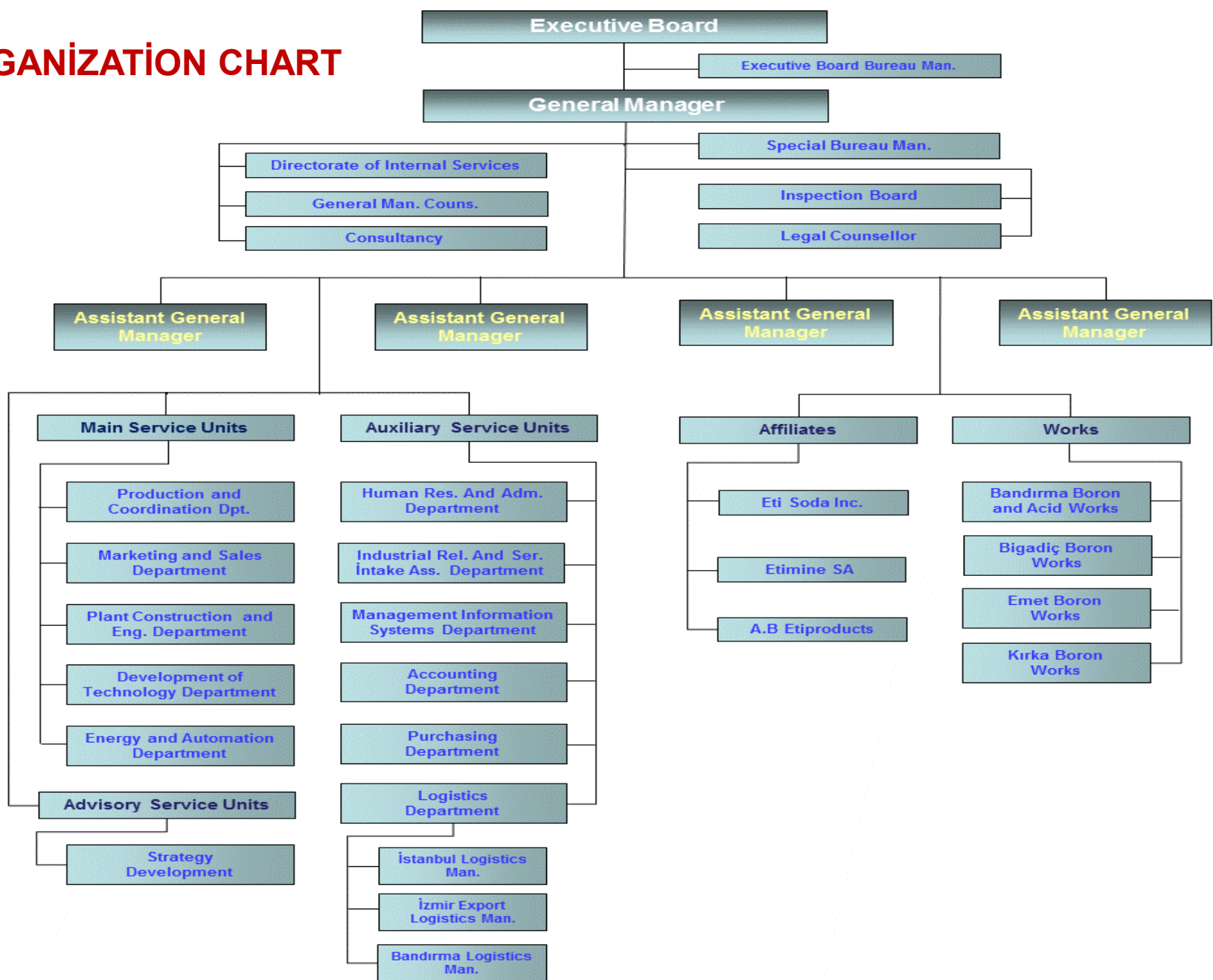
- Eti Maden is open to cooperate with local or foreign technology firms to develop innovative boron products.
- As a reliable and the leading supply source of boron, Eti Maden encourages the local and foreign private investors to invest in those boron using industries in our country.



Our Marketing Representatives & Agencies



ORGANIZATION CHART



HUMAN RESOURCES Mission & Vision



MISSION

- Mission is to utilize national boron resources within the framework of sustainable development, and to serve all humanity by converting them in to high value added boron products, thus to contribute to the nations's prosperity.



VISION

- To create a qualified work force with a spirit of unity, mindful to his duties, putting innovative efforts at front, protecting and upgrading institutional image and with strong motivation.



Human Resources*

UNIT	CIVIL SERVANT	CONTRACT EMPLOYEE	TOTAL	LABOR	PERSON WITH DISABILITIES	TOTAL
CENTRE	210	537	747	29	2	778
PROVINCE	69	702	771	2.302	83	3.166
GRAND TOTAL	279	1.239	1.518	2.331	85	3.944

* August 31st 2013

For more information: www.etimaden.gov.tr





ETİ MADEN İŞLETMELERİ GENEL MÜDÜRLÜĞÜ
KIRKA BOR İŞLETME MÜDÜRLÜĞÜ



KIRKA



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BEFORE



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BEFORE



AFTER



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BİGADIÇ





BANDIRMA



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THANKS

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