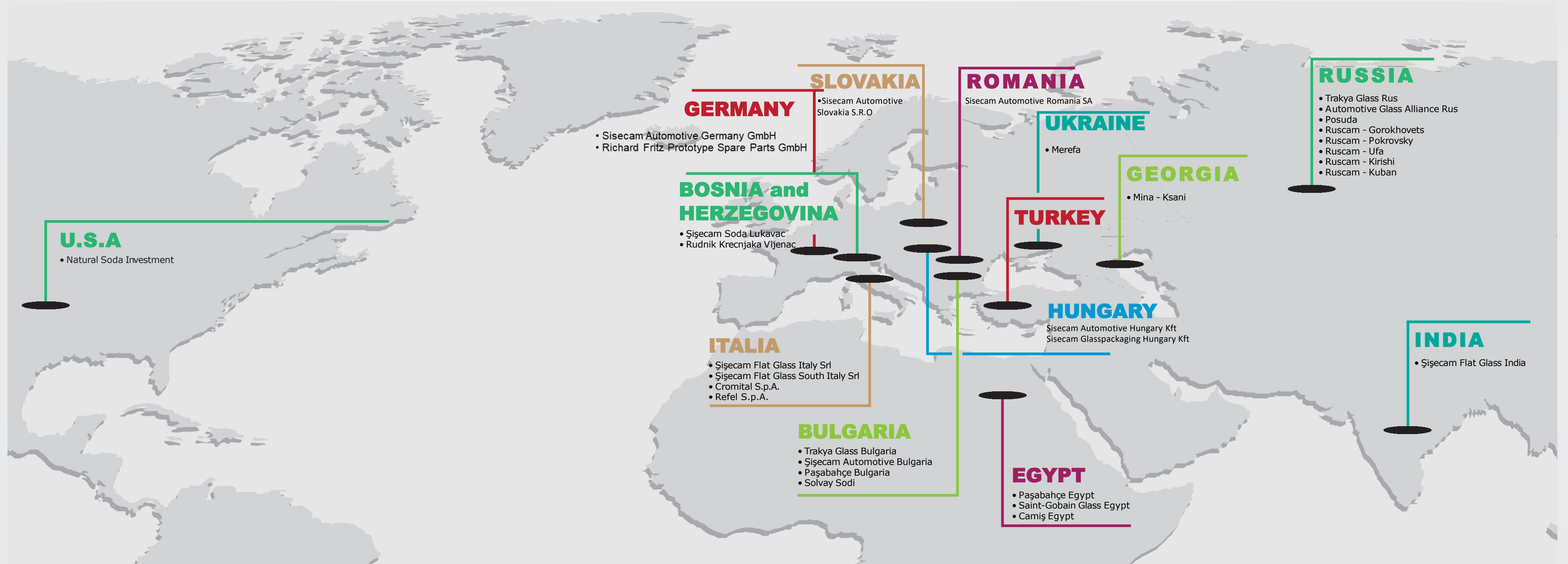


**ŞİŞECAM**

# PRODUCTION IN 4 CONTINENTS

Production facilities in 4 continents and 14 countries with 45 plants in total, 24 thousand employees, sales in more than 150 countries



## ŞİŞECAM PRODUCTION PLANTS IN TURKEY

### Flat Glass

Kırklareli Plant Branch  
Mersin Plant Branch  
Bursa Plant Branch  
Ankara Plant Branch

### Glassware

Kırklareli Plant Branch  
Eskişehir Plant Branch  
Denizli Plant Branch  
Camiş Ambalaj Sanayi A.Ş.  
Tuzla Plant

### Glass Packaging

Mersin Plant Branch  
Yenişehir Plant Branch  
Eskişehir Plant Branch

### Chemicals

Mersin Soda Plant Branch  
Mersin Kromsan Plant Branch  
Oxyvit Kimya Sanayii ve Ticaret A.Ş.  
Mersin Plant  
Mersin Kojenarasyon Plant

### Automotive Glass

Otocam Plant

### Mining

Yalikoş Sand Processing Facilities  
Trakya Limestone and Dolomite Grinding Plant  
Bilecik Raw Material Processing Facilities  
Balıkesir Duvertepe Kaolin Crushing and Screening Plant  
Aydın Çine Feldspar Processing and Magnetic Separation Plant  
Karabük Quartz Sand Processing Plant  
Mersin Quartz Sand Processing Plant  
Mersin Limestone and Dolomite Grinding Plant

### Glass Fiber

Şişecam Elyaf Sanayii A.Ş.  
Balıkesir Plant

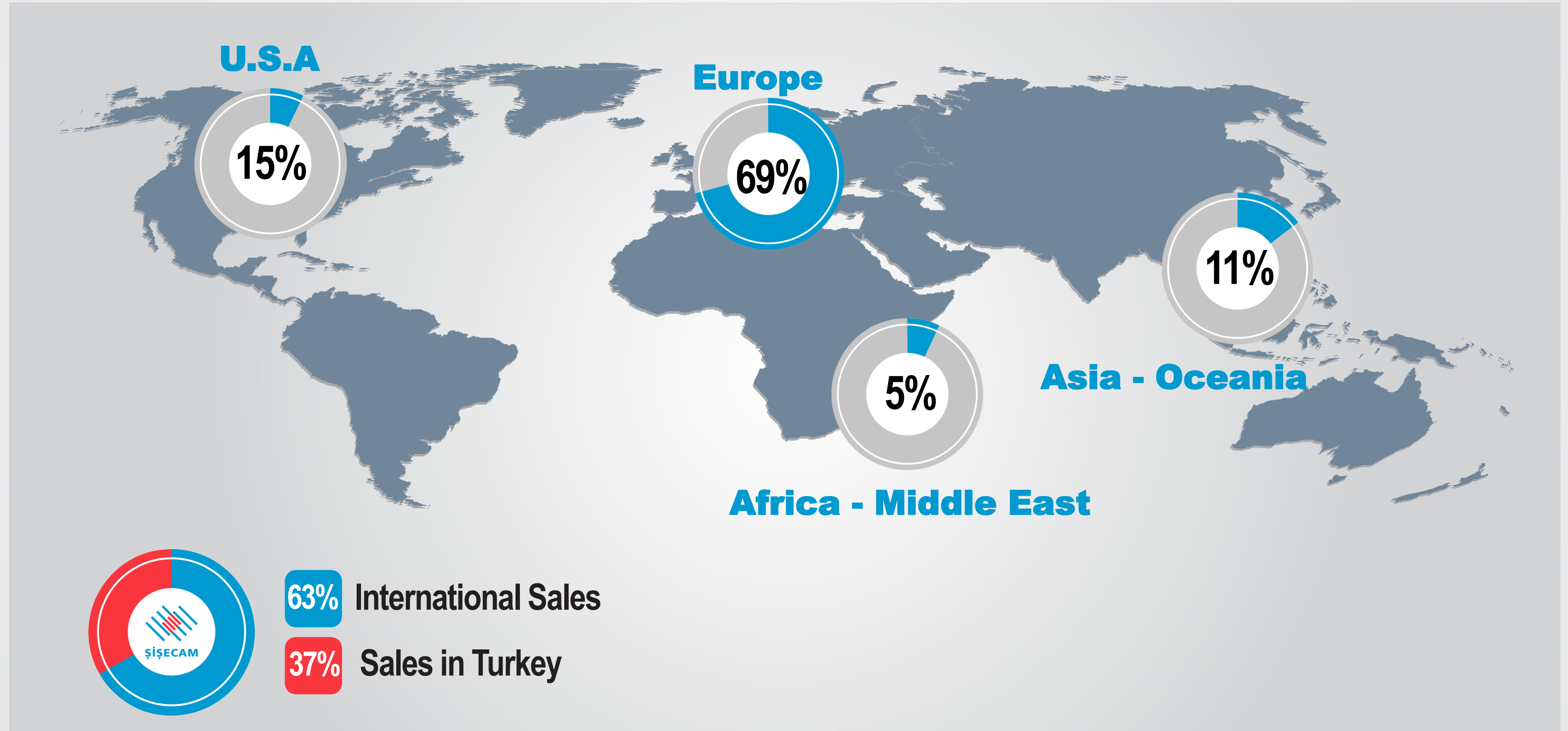
### Energy

Camiş Elektrik Üretim A.Ş.  
Trakya Regional Power Plant

### Recycle

Şişecam Çevre Sistemleri A.Ş.  
Yenişehir Facility  
Eskişehir Facility



# ŞİŞECAM'S PRESENCE IN GLOBAL MARKET



# AREAS OF ACTIVITY

 <b>FLAT GLASS</b>	 <b>HOUSEHOLD GLASSWARE</b>	 <b>GLASS PACKAGING</b>	 <b>CHEMICALS</b>	 <b>AUTOMOTIVE</b>
<p>Architectural glasses, solar power glasses, white goods glasses</p>	<p>Automatic and handcrafted household glassware production from soda, crystalline, heat-resistant borosilicate glass, and lead-free crystal, paper and cardboard packaging production, and retailing.</p>	<p>Glass packaging production for the food, beverage, pharmaceuticals, and cosmetics industries</p>	<p>Production of soda derivatives and chromium chemicals, glass-fiber, industrial raw materials, electricity, Vitamin K3 derivatives, and sodium metabisulphite.</p>	<p>Şişecam is Turkey's leading automotive glass producer. Utilizing state-of-the-art production technologies and boasting synchronous design capabilities, the Company meets the differentiated needs of customers in the global automotive industry as well as in the spare parts market.</p>

## GLOBAL POSITION\*

	 <b>Europe</b>	 <b>Global</b>
<b>Flat Glass</b>	<b>2</b>	<b>5</b>
<b>Glassware</b>	<b>2</b>	<b>2</b>
<b>Glass Packaging</b>	<b>5</b>	<b>5</b>
<b>Chemicals - Soda Ash**</b>	<b>4</b>	<b>2*</b>

\* On the basis of production as of 2021

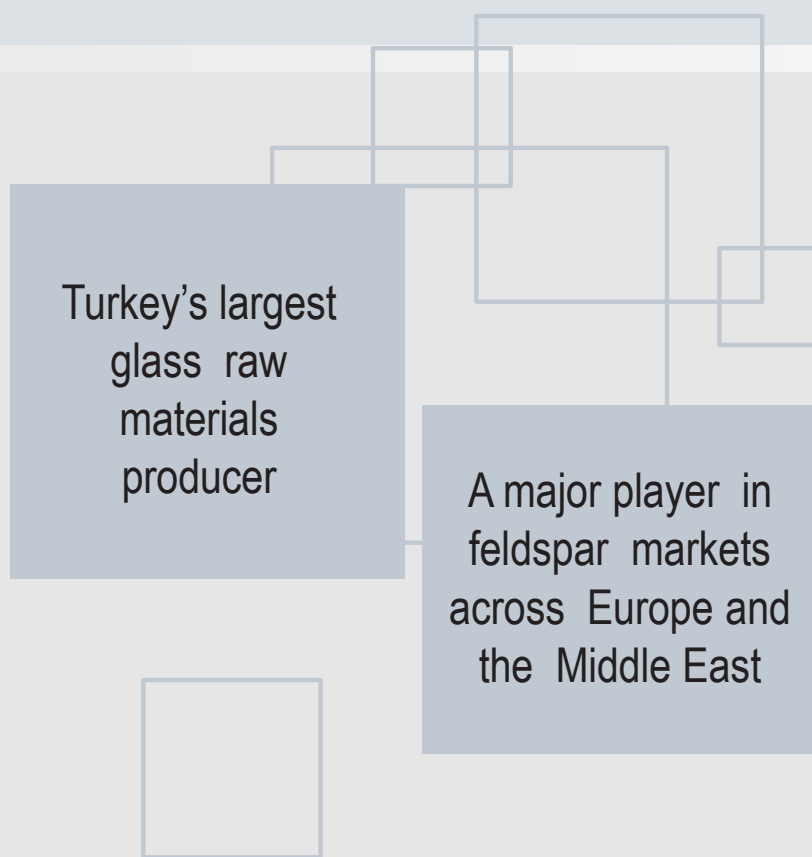
\*\* In the European position, only the total production capacities of the manufacturers in their factories in the European Area are evaluated.

# AREAS OF ACTIVITY



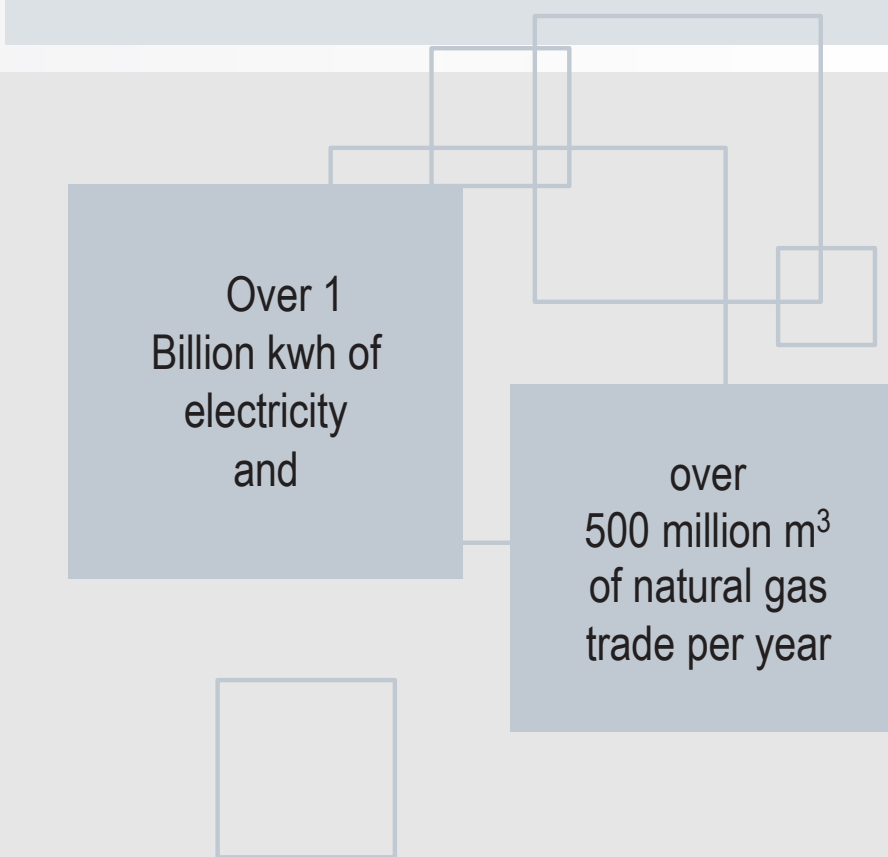
## MINING

Şişecam is Turkey's largest glass raw materials producer. The Company is a reliable and sustainable raw material supplier for its own glass and glass fiber production facilities as part of its mining operations. In addition, Şişecam provides high-quality sustainable raw material input to numerous sectors, including glass, ceramics, chemicals, metallurgy, agriculture and construction.



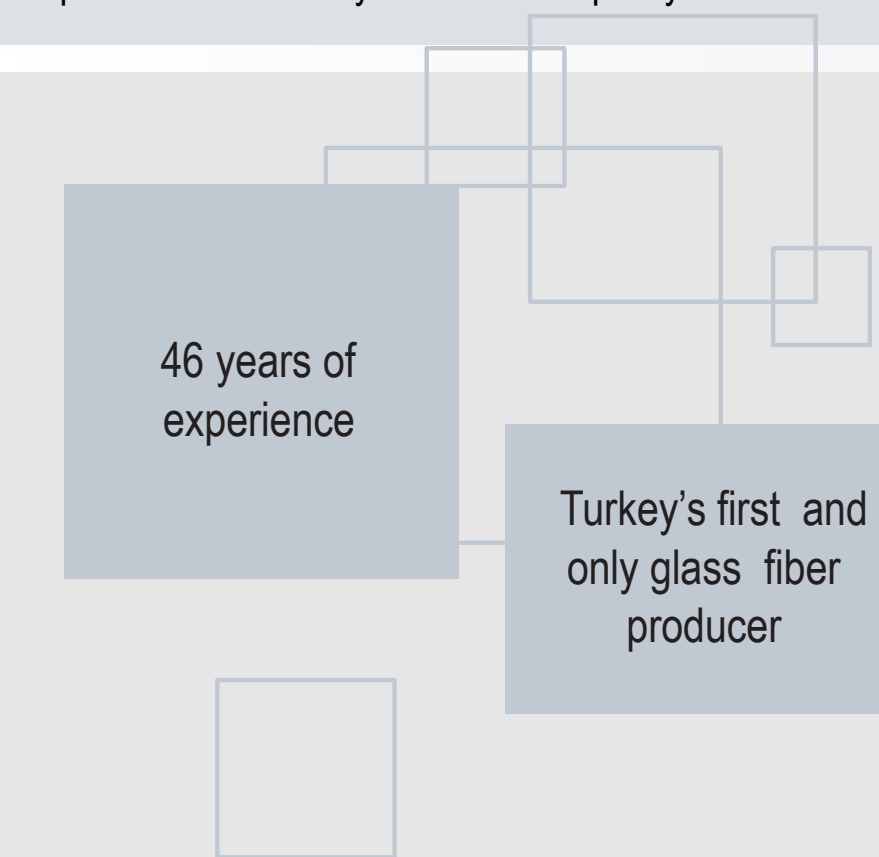
## ENERGY

Şişecam executes energy operations in electricity and natural gas markets. The Company's operations are aimed at generating and trading electricity and energy capacity; trading, importing, exporting and storing compressed natural gas (CNG) and liquefied natural gas (LNG); and building the infrastructure necessary to perform such operations. Şişecam also conducts marketing, research and business development activities in this area.



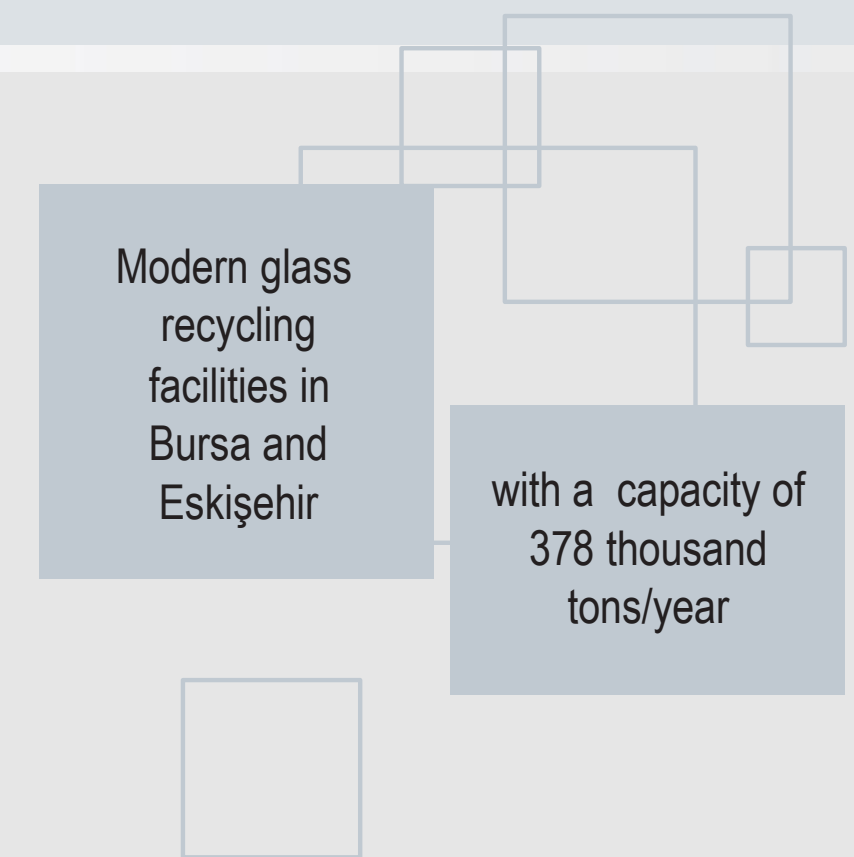
## GLASS FIBER

Şişecam is Turkey's first and only glass fiber producer. The Company acts as a guarantor of local glass fiber supply for sectors it provides input. Şişecam transforms local resources into value-added products via the production of glass fiber, one of the key inputs of the composite industry. With its extensive R&D operations, Şişecam serves a wide array of sectors worldwide – including wind energy, electronics, automotive, engineering plastics, infrastructure, marine, industrial applications, defense and construction – with glass fiber products certified by international quality institutions.



## RECYCLING

Şişecam is Turkey's leading group in glass recycling. The Company recovers resources by recycling waste within the endless cycle of glass – the world's most sustainable packaging material. Waste glass is separated from other contaminants and glass is sorted on the basis of color (e.g. amber, flint, green) at Şişecam's recycling facilities.



\* On the basis of production

# ŞİŞECAM AT A GLANCE

5.78 MILLION TONS  
OF GLASS PRODUCTION

~5 MILLION TONS  
OF SODA PRODUCTION

PRODUCTION IN  
14 COUNTRIES

24.000+  
EMPLOYEES

5<sup>th</sup> Largest Player  
Globally in **Flat  
Glass**

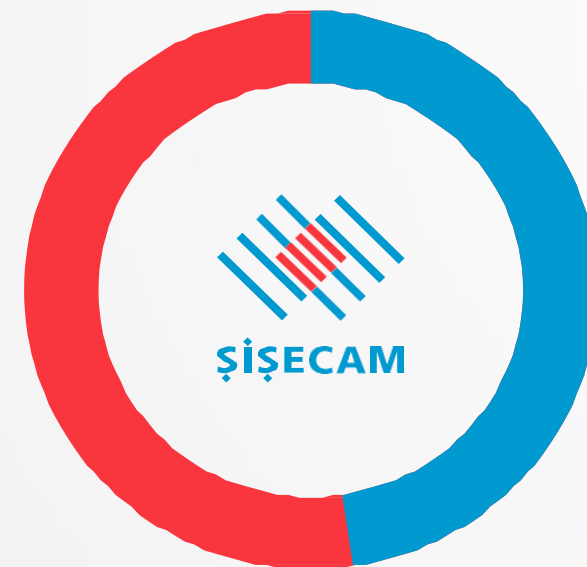
2<sup>nd</sup> Largest Player  
Globally in  
**Glassware**

5<sup>th</sup> Largest Player  
Globally in **Glass  
Packaging**

2<sup>nd</sup> Largest Player  
Globally in **Soda  
Ash Production**

World leader in **Basic  
Chromium Sulphate  
Production**

4<sup>th</sup> Largest Player  
Globally in **Chromic  
Acid Production**



**PUBLICLY LISTED BY 49%**

**OWNED BY İŞ BANKASI  
AND AFFILIATES THEREOF BY 51%**

**87 YEARS OF  
CORPORATE  
HISTORY**

**PRODUCTION  
AT 45 PLANTS**

**SALES IN  
150 COUNTRIES**

**LISTED IN STOCK  
EXCHANGE SINCE 1986**

# ŞİŞECAM'S OPERATIONS IN THE RUSSIAN FEDERATION



## MARKET LEADER

Şişecam is in the leading position in Russia with its glass packaging and glassware production capacities. With a market share of nearly 30% Şişecam is the market leader in glass packaging and glassware.



## 94 BILLION RUB

Şişecam's investments in Russian Federation exceed RUB 94 BN.



## 5.000 EMPLOYEES

Şişecam employs nearly 5.000 people at its 8 plants in the Russian Federation.



## 1,6 MILLION TONS OF PRODUCTION

Şişecam Flat Glass, Glass Packaging, and Glassware plants operating in Russia have an annual production capacity of more than 1,6 million tons.



## 3,2 MILLION M2 PRODUCTION

Şişecam Automotive Glass Alliance Rus AO plant operating in Tatarstan serves with an annual automotive glass production capacity of 3,2 million m2.



## MORE THAN 20 YEARS OF EXISTENCE

Şişecam has been performing its operations for more than 20 years in the Russian Federation.

# ŞİŞECAM'S OPERATIONS IN THE RUSSIAN FEDERATION



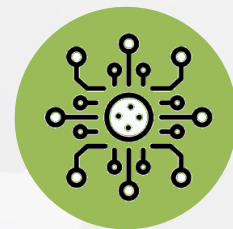
## ECONOMY

Being the largest exporter of Russia in its industry, Şişecam offers considerable benefits in its capacity of a domestic capital entity. In addition, Şişecam contributes to Russian economy through not only exports but also creating employment in the country including subcontractors and suppliers.



## SKILLED TALENT

The Leadership School of Şişecam- Şişecam Academy serves in the Russian Glass Packaging facility. Classroom trainings in Russian help to improve skills and capabilities.



## DIGITALISATION INVESTMENTS

The investments of Şişecam on digitalisation have been amounted to approximately USD 10-15 MN in the Russian Federation.

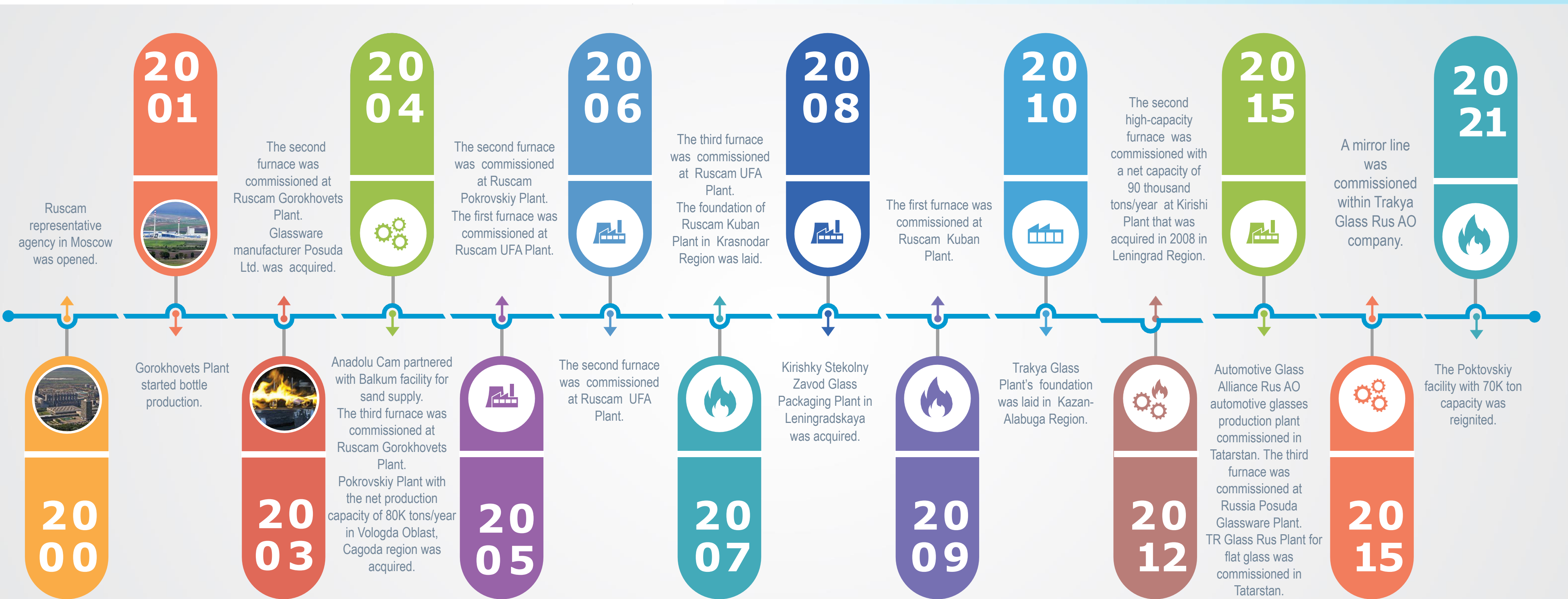


## SALES CONTRIBUTION

Around 14% of Şişecam consolidated net sales (~ RUB 21 BN) originated from companies located in the Russian Federation.



# EXPERIENCE IN THE COUNTRY FOR MORE THAN 20 YEARS



Richard Fritz Holding GmbH, the choice of world's leading high-end car makers, was acquired by Şişecam in 2013.



**€ 65 MN**

Şişecam's total investments in Germany, Hungary, and Slovakia amount to nearly **Eur 65 million**.



**945  
EMPLOYEES**

Şişecam Automotive nearly **945 persons** at its **4 plants** in Germany, Hungary, and Slovakia.



**15-MILLION  
PLATES**

Şişecam plants in Germany, Hungary, and Slovakia operate with a total production capacity of **15 Million** plates per year.



**4 PRODUCTION  
PLANTS**

Şişecam Automotive encapsulated glass production plants operating within Şişecam Automotive Co., Inc. are established at **4 different** locations of Europe, two in Germany and one in each Hungary and Slovakia.



## World Leader in Technology

Operating within Şişecam, Şişecam Otomotiv ranks as the world leader in the encapsulated glass production technologies thanks to its design, engineering, and know-how.



## Production for High-End Brands

Among the customers of Şişecam Otomotiv plants in Germany, Hungary, and Slovakia, there are high-end car brands such as **Audi, Bentley, BMW, Daimler, Porsche and Rolls Royce.**

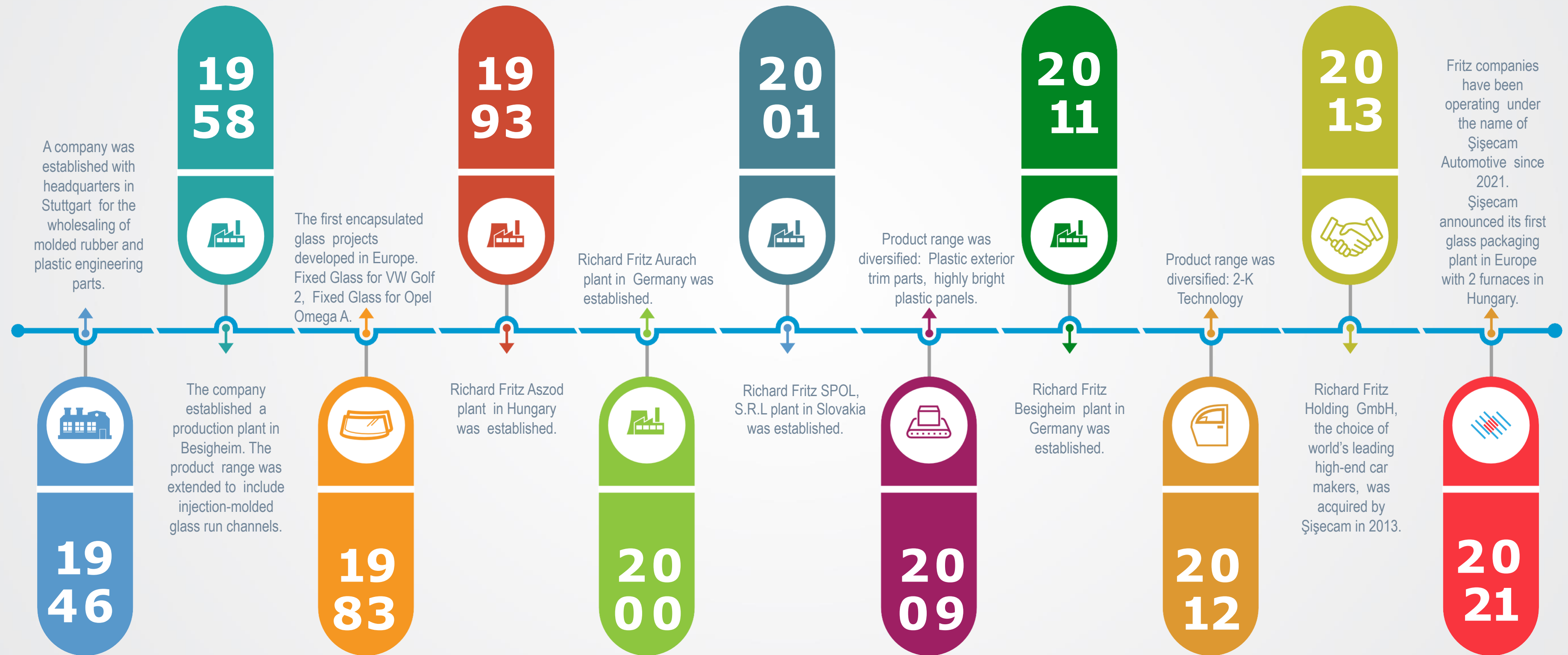
Şişecam will establish its first glass packaging plant in Europe with 2 furnaces in Hungary. .



## **GLASS PACKAGING PRODUCTION INVESTMENT**

Şişecam will establish its first glass packaging plant in Europe with 2 furnaces in Hungary. The greenfield glass packaging project with two furnaces and 220 million EUR investment will have an annual net production capacity of 330,000 tons. The Hungarian facility is planned to be commissioned in 2023 and reach full production capacity in 2025.

# JOURNEY OF ŞİŞECAM IN GERMANY - HUNGARY - SLOVAKIA



# BOSNIA AND HERZEGOVINA



**€ 190 MN**

Investments by Şişecam in Bosnia and Herzegovina near **EUR 190-million**.



**2.1 MILLION  
TONS**  
OF PRODUCTION

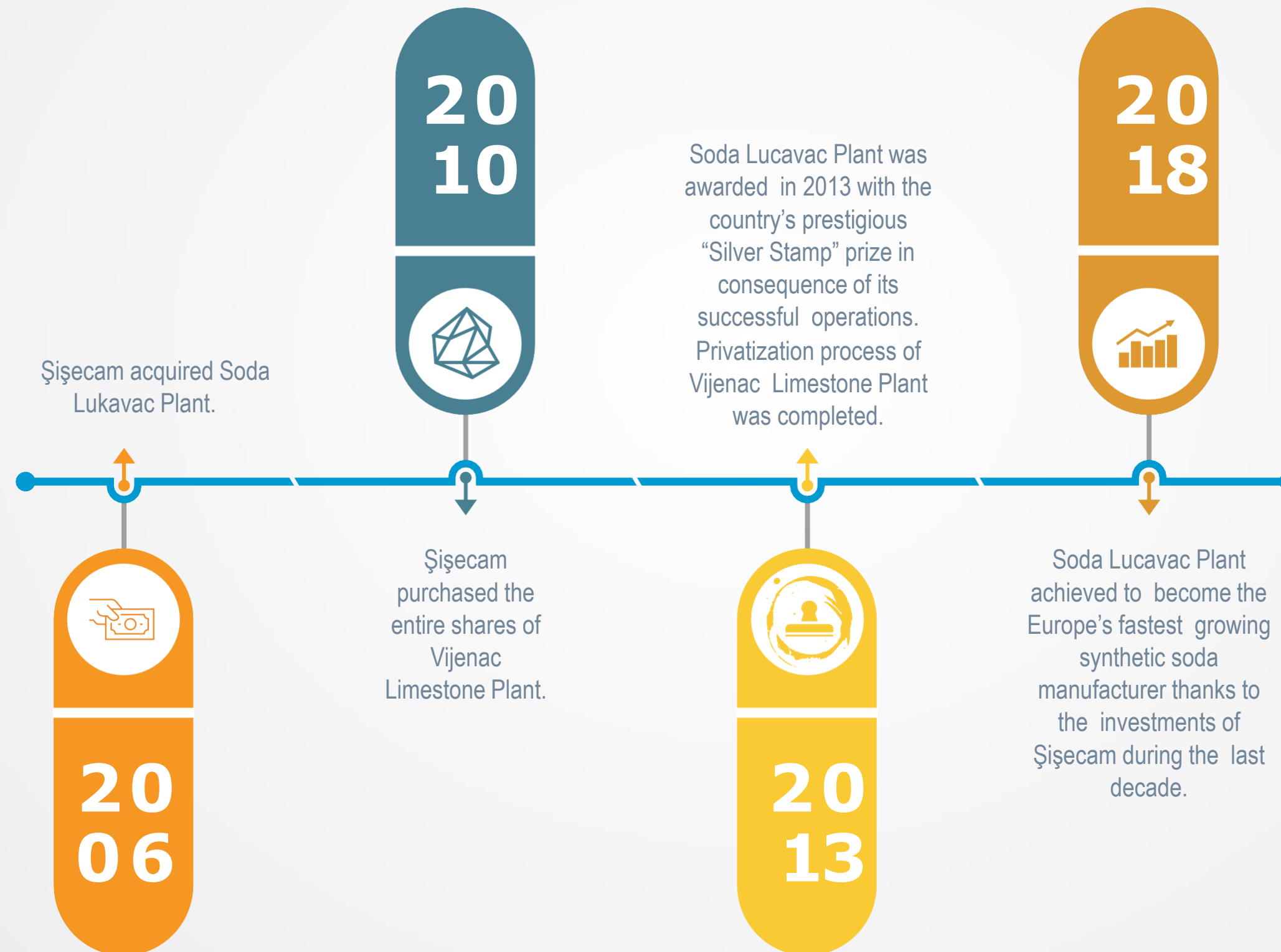
Şişecam Soda Lukavac plant and Rudnik Krecnjaka Vijenac D.O.O. operating in Bosnia and Herzegovina serves with an annual production capacity of 2.1 million tons.



**1.000**  
EMPLOYEES

Şişecam employs nearly **one-thousand persons** at its **2 plants** in Bosnia and Herzegovin

# ŞİŞECAM'S JOURNEY IN BOSNIA AND HERZEGOVINA





## The Largest Greenfield Investor

Şişecam took the first step of new direct investments in Bulgaria in 2004 and laid the foundations of its plants for the production of basic glasses, white goods glasses, automotive glasses, and household glassware. Thanks to this large-scale direct investment, the Group holds the title of "The Biggest Greenfield Investor" in Bulgaria.



USD  
905 MN

Investments by Şişecam in Bulgaria exceed USD 905-million.



3070  
EMPLOYEES

Şişecam employs nearly 3,070 persons at its 5 plants in Bulgaria.



620  
THOUSAND  
TONS  
OF PRODUCTION

Şişecam Flat Glass and Household Glassware Plants operating in Bulgaria have an annual production capacity of 620 thousand tons.



5.3 MN  
m<sup>2</sup>  
PRODUCTION

Şişecam processed glass and automotive glass plants operating in Bulgaria have an annual production capacity of 5.3-million m<sup>2</sup>.



SUSTAINABLE  
INVESTMENT  
AWARD

Şişecam, was awarded the "Sustainable Investment Award" given for the first time in 2020 by the Bulgarian Investment Agency.





## Power

Within the framework of the Group's sustainability approach, the waste-heat of the production process is recovered to generate electric power thanks to the investment made in **2015** in the Bulgarian Flat Glass Plant. Thus, the waste-heat of the natural gas firing melting furnaces is recovered.



## Innovation

At the household glassware plant in Bulgaria, the melting process is conducted via **oxy-fuel** (burning process with a mixture of oxygen and natural gas instead of air) technology. Thanks to this technology, which is the first in the global household glassware production industry, natural gas is saved by **6 to 8%** annually as a result of the preheating of oxygen and natural gas prior to their delivery to the burning process.



## Leadership

The **Bulgarian Glass Association** established by Şişecam in 2018 for the development of the industry represents the Bulgarian glass industry both nationwide and also at the industrial institutions and organizations in **Europe**.



## Training

Cooperation is made with schools and training scholarships are granted to create employment opportunities in the region and to benefit from the hands-on vocational training practices and incentives.



## True Leaders Award

Within the scope of “**ICAP True Leaders**” awards granted in Bulgaria since 2012 to determine the leading companies of Bulgaria, Paşabahçe Bulgaria EAD Plant was awarded in 2017 with the prize of “**Industry Leader**”.

# ŞİŞECAM'S JOURNEY IN BULGARIA

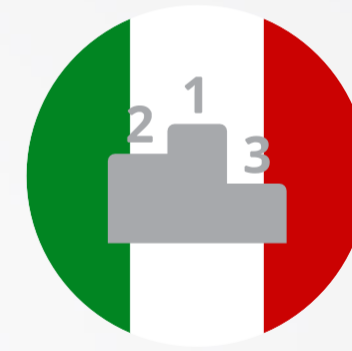




Chromic Acid  
Production

**LEADER in  
EUROPE**

Cromital S.p.A investment plays a major part in Şişecam leading position in the chromic acid production in Europe.



Liquid and Powdered Basic Chromium  
Sulphate production

**LEADER in ITALY**

Besides providing inputs for many industries in Europe led by the Italian leather and metal plating sector, Cromital S.p.A. is in a leading position in the chromium based chemicals business line in Italy, which is the largest leather processing center in Europe, thanks to its liquid and powdered basic chromium sulphate production and sales.



**€ 172 MN**

Investments by Şişecam in Italy exceed **EUR 172-million**.



**550 EMPLOYEES**

Şişecam employs **550 persons** within the scope of its Italian Operations.



**6.000 TONS OF PRODUCTION**

Operating in the AZS refractory material field, Refel S.p.A. plant serves with an annual production capacity of **6.000 tons**.



**FLAT GLASS PRODUCTION LEADER in EUROPE**

Today, it is the Europe's largest flat glass producer with Şişecam annual flat glass production capacity of more than **2.8 million tons**.



**RECYCLING**

Şişecam's Italian investment Cromital S.p.A. operates as the **only plant licensed in Italy** to treat and recycle chromium-contaminated wastewater of the metal plating sector. At this plant, the chromium recycled from wastes is made reusable to contribute to the protection of the environment.



**410.000 TONS OF PRODUCTION**

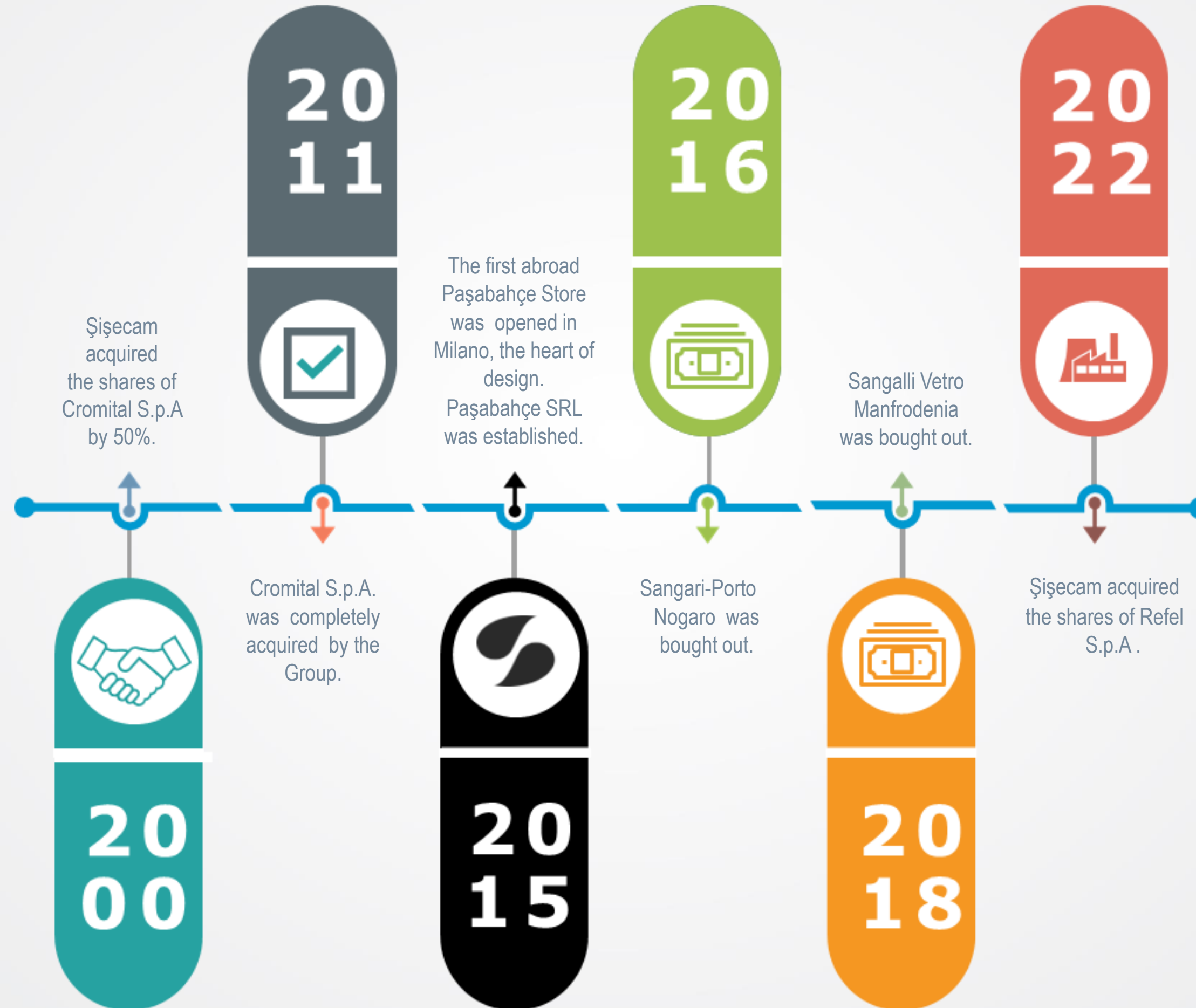
Şişecam Flat Glass Plants operating in Italy have an annual production capacity of **410 thousand tons**.



**8.800 TONS OF PRODUCTION**

Operating in the chromium based chemicals field, Şişecam Cromital S.p.A. plant serves with an annual production capacity of **8-thousand and 800 tons**.

# ŞİŞECAM'S JOURNEY IN ITALY



# ROMANIA



**€ 80 MN**

**INVESTMENT**

Şişecam's investments in Romania reached **EUR 80 mn.**



**505**

**EMPLOYEES**

Şişecam employs nearly **505 persons** at its Romanian plant operating in the automotive glass industry.



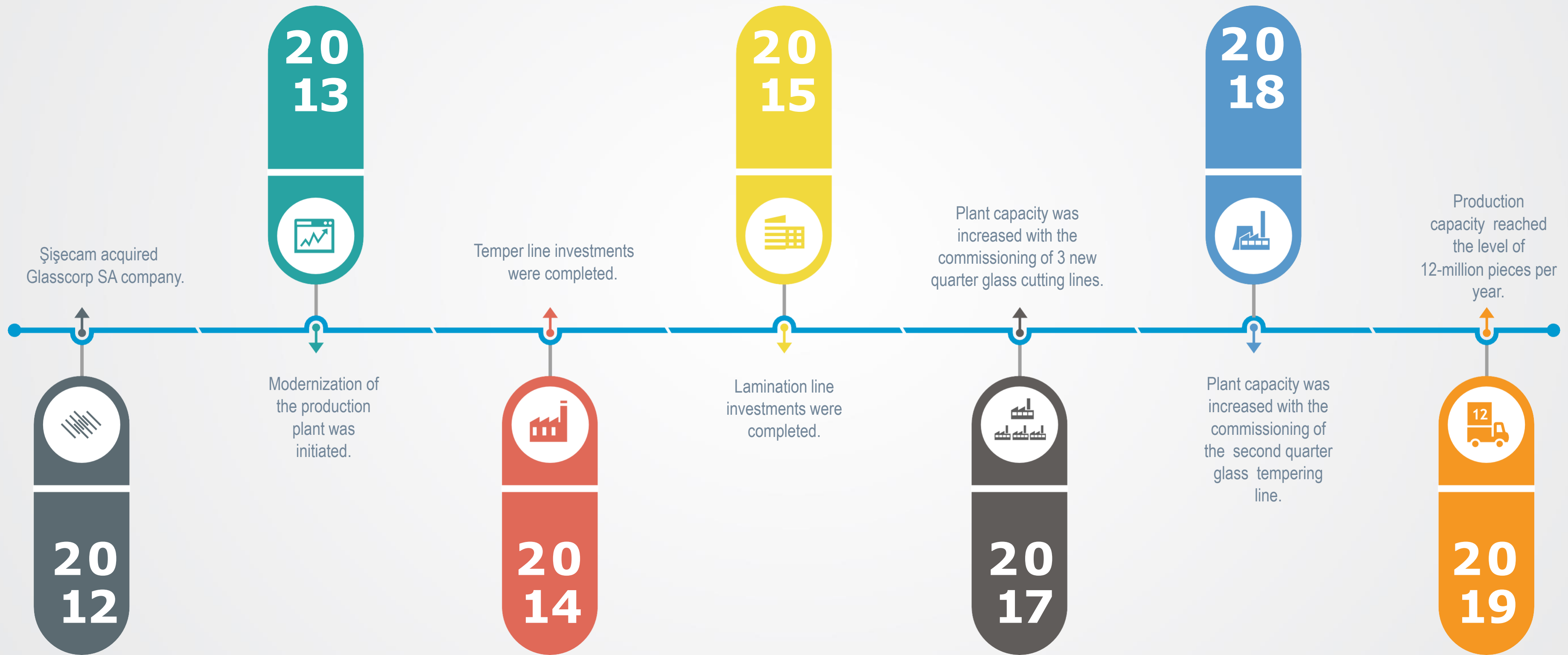
**12-MILLION**

**UNITS**

**PRODUCTION  
CAPACITY OF**

Şişecam's Romanian plant operating in the industry of automotive glasses has an annual production capacity of **12-million pieces.**

# ŞİŞECAM'S JOURNEY IN ROMANIA



# ŞİŞECAM'S OPERATIONS IN THE U.S.A



## 2nd LARGEST SODA ASH PRODUCER IN THE U.S.A

Şişecam has made an investment in the USA to change the structure of its partnership with Ciner Group. With this investment, Şişecam has become one of the top 3 soda ash producers in the world.  
Catering the market in glass segments through exports



## 500 EMPLOYEES

Şişecam employs nearly 500 persons in USA  
Together with suppliers and subcontractors, supporting the ecosystem of Wyoming Region with nearly 2000 direct and indirect employment



## 8 MILLION TONS PRODUCTION CAPACITY

Şişecam's controlled soda ash production capacity will exceed 8 Million metric tons by the completion of the investment, compared to the existing capacity of 2.5 Million metric tons today.



## 4 BILLION USD INVESTMENT

Şişecam and its partner Ciner Group will invest 4 Billion USD in the US Soda Ash Industry  
Exporting more than 50% of production as of today, will go beyond 75% after new investment is completed, replacing Chinese productions

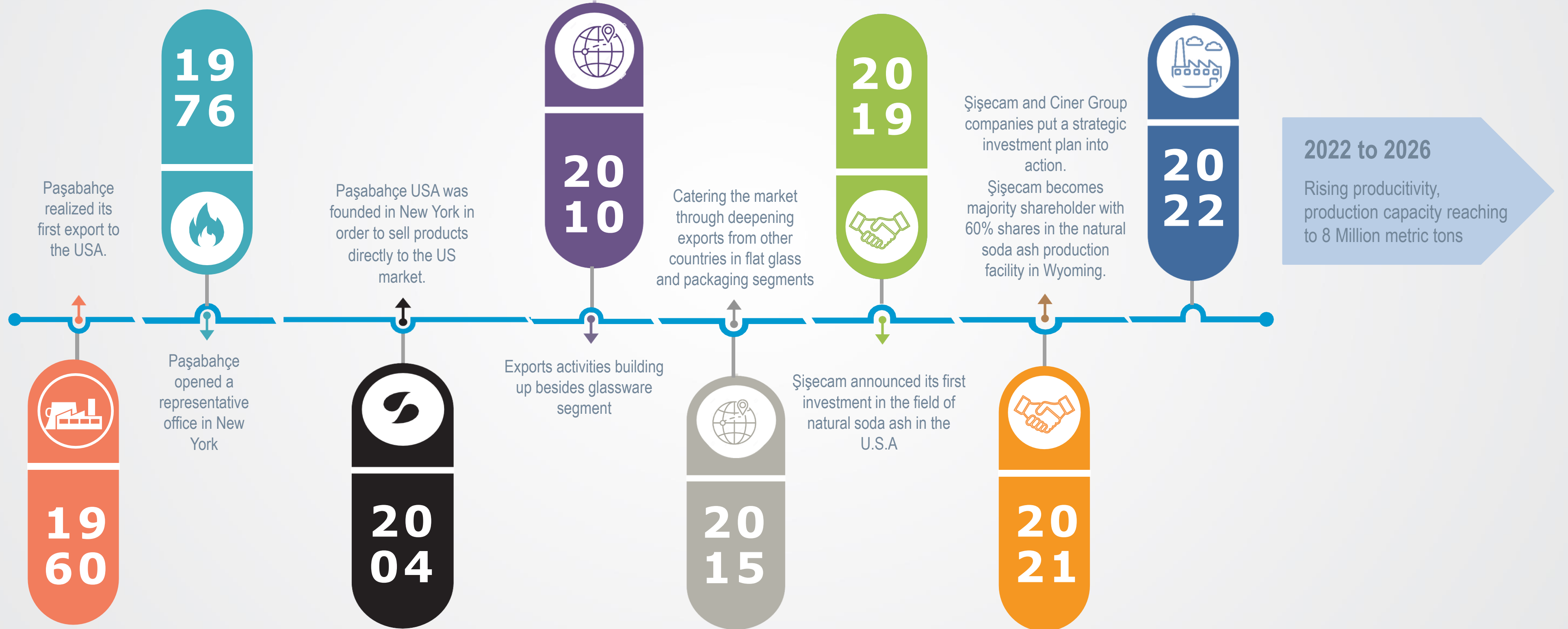


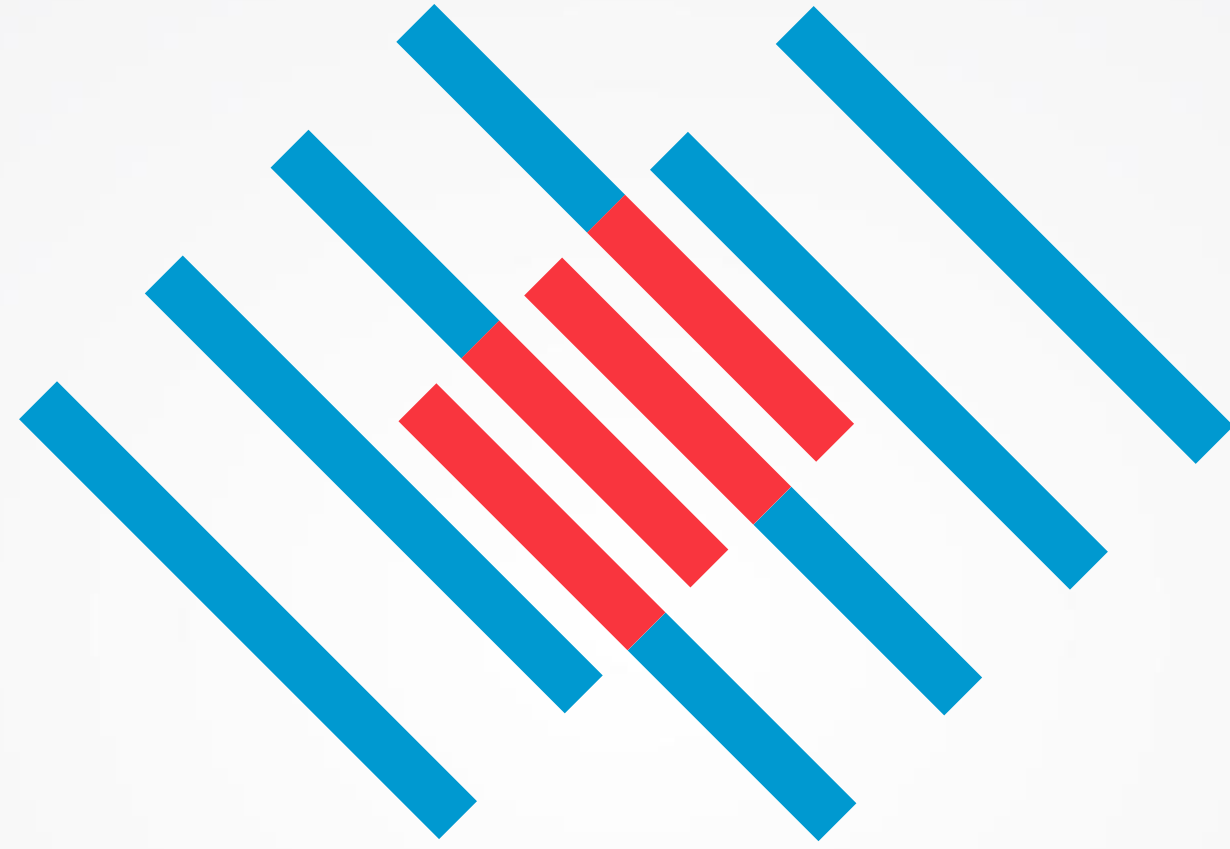
## SUSTAINABILITY

Most sustainable production of soda ash in new investment  
The lowest ever energy consumption amongst comparable facilities



# ŞİŞECAM'S JOURNEY IN THE U.S.A





**ŞİŞECAM**