

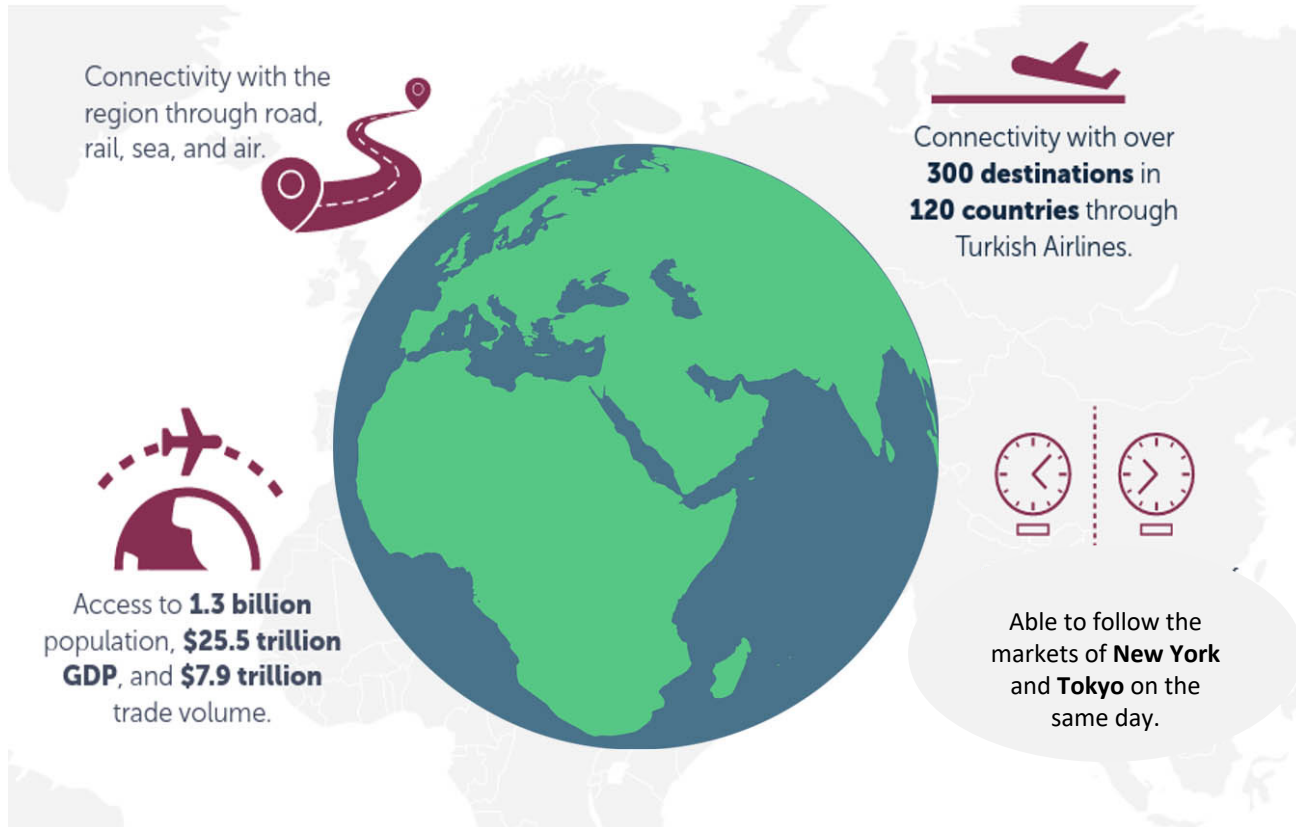
SGS
Investor Days
2022



SGS Turkiye

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Turkiye at a glance



11% GDP growth (2021)

5.5% GDP growth (CAGR 2002-2021)

84.68 million population (2021)

76,337 foreign capital company

1st
★★★★★

33.1 avg age of population (2021)

225.4 bn USD exports (2021)

Fastest growing economy in the G20, OECD, and the EU in 2021

271 bn USD imports (2021)

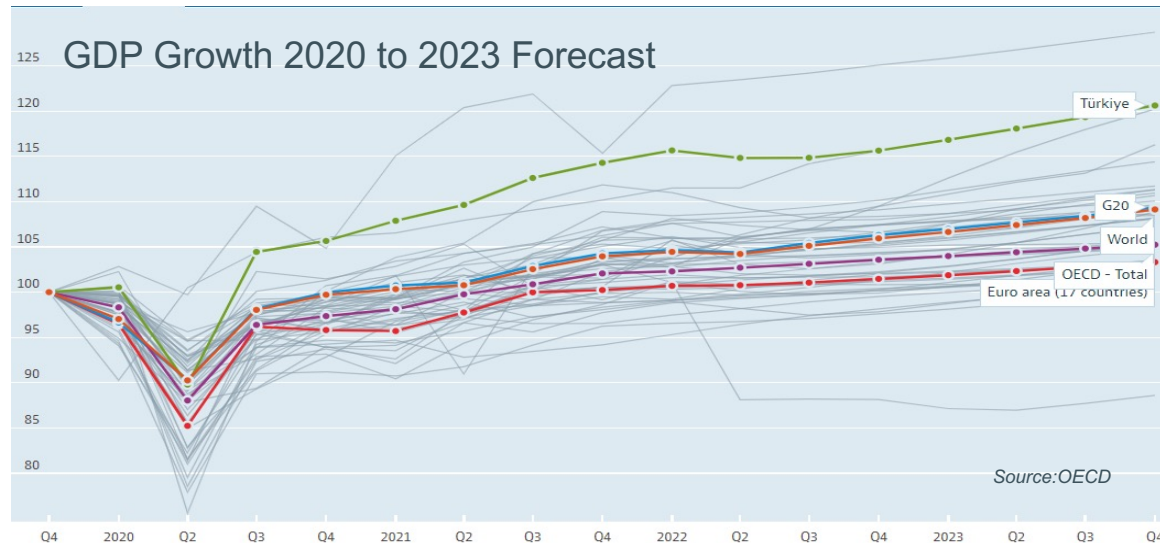
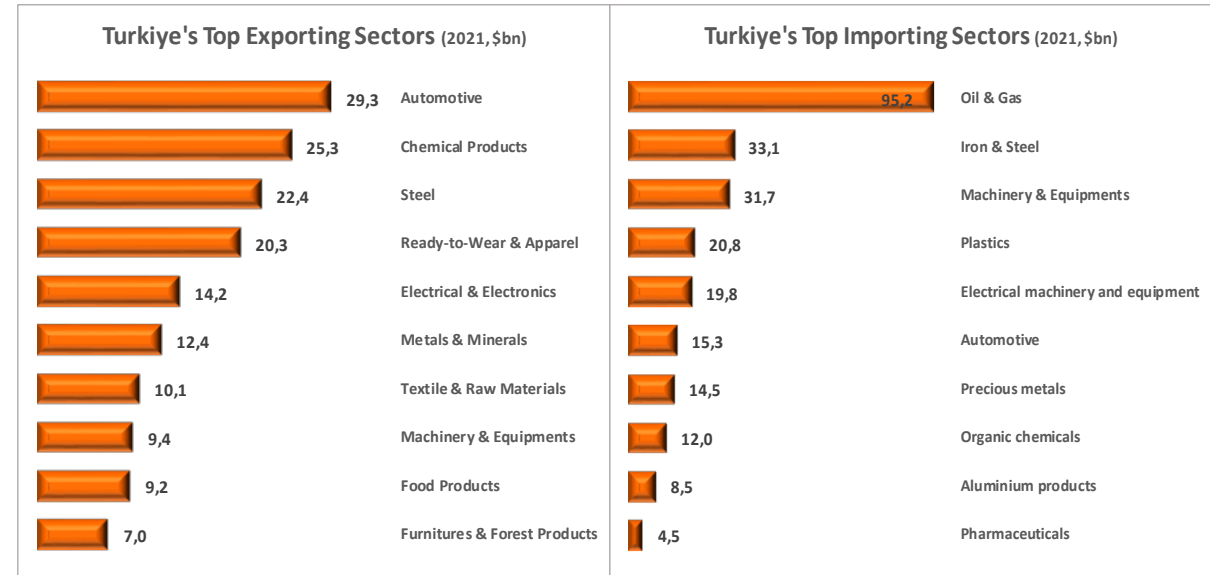
803 bn \$ GDP current prices

239 bn USD FDI (2003-2021)

87,741 exporting companies

Economy

- Türkiye a very open economy with total foreign trade volume corresponding to more than 60% of GDP.
- Exports from 36 \$bn in 2002 to 225.4 \$bn in 2021, and planned to reach 255 \$bn in 2024. most important export products are automotive, ready-made clothing and textiles, white goods, agriculture and food products.
- Total imports of 271 \$bn in 2021 highest import products are natural gas and petroleum, automotive and electronic devices.



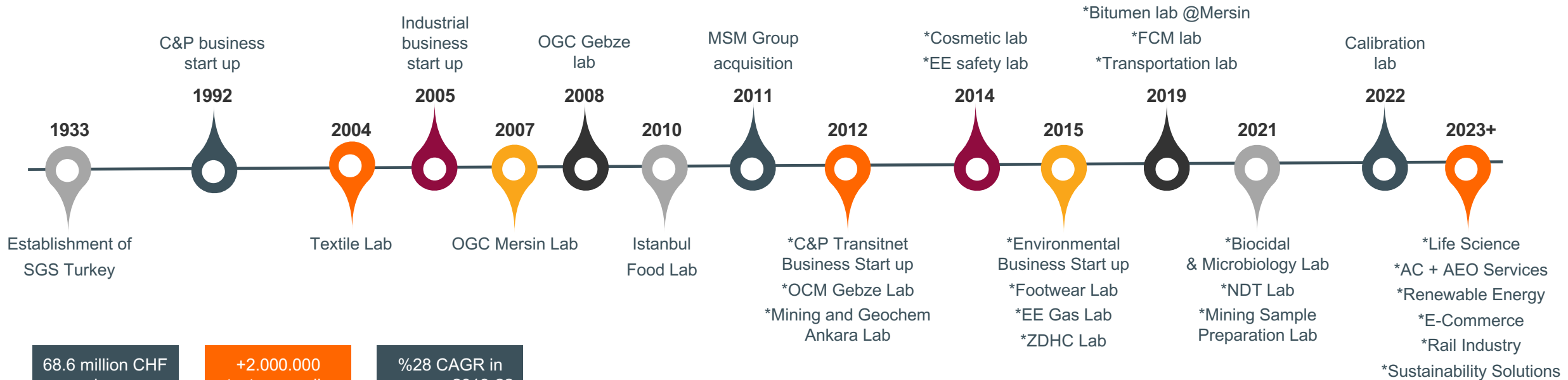
- The countries with the largest share in Turkey's exports are respectively; Germany with 8.4%, the USA with 6.8%, the United Kingdom with 5.2%, Italy with 5.1%, Iraq with 5.0%.
- The countries with the highest share in Turkey's imports are respectively; Russia with 15.5%, China with 11.5%, Germany with 6.4% and the USA with 4.3%.

Strategic location

- Reliable partner to both East & West facilitating flow of goods, «Grain Corridor» in Ukraine – Russia dispute.
- In the heart of OBOR (One Belt One Road) Project connecting China and Europe.
- Turkiye plays quite important role to be a reliable energy corridor between the source & consumption, gateway to alternative sources for Eurozone.
- **Existing Natural Gas Pipelines (NGP)**
 - TANAP: Azerbaijan - Turkey NGP
 - Turkish Stream: Russia - Turkey NGP
 - Blue Stream: Russia - Turkey NGP
 - Iran- Turkiye Natural Gas Pipeline
 - Baku Tiblisi Erzurum NGP: Azerbaijan - Turkey
 - Trans Balkan NGP: Russia – Turkey
- **Existing Crude Oil Pipelines (COP)**
 - BTC: Baku Tiblisi Ceyhan COP
 - Kirkuk - Ceyhan COP
 - Erbil - Ceyhan COP
- The Turkish textile sector has the competencies and attributes to meet the sector's sustainability expectations. With its standards and measures in agriculture, raw materials, production, environmental safeguards, geographical location, and social compliance, it is the address where brand owners can fulfil their sustainability strategy, vision and expectations in one place, under one roof and together.



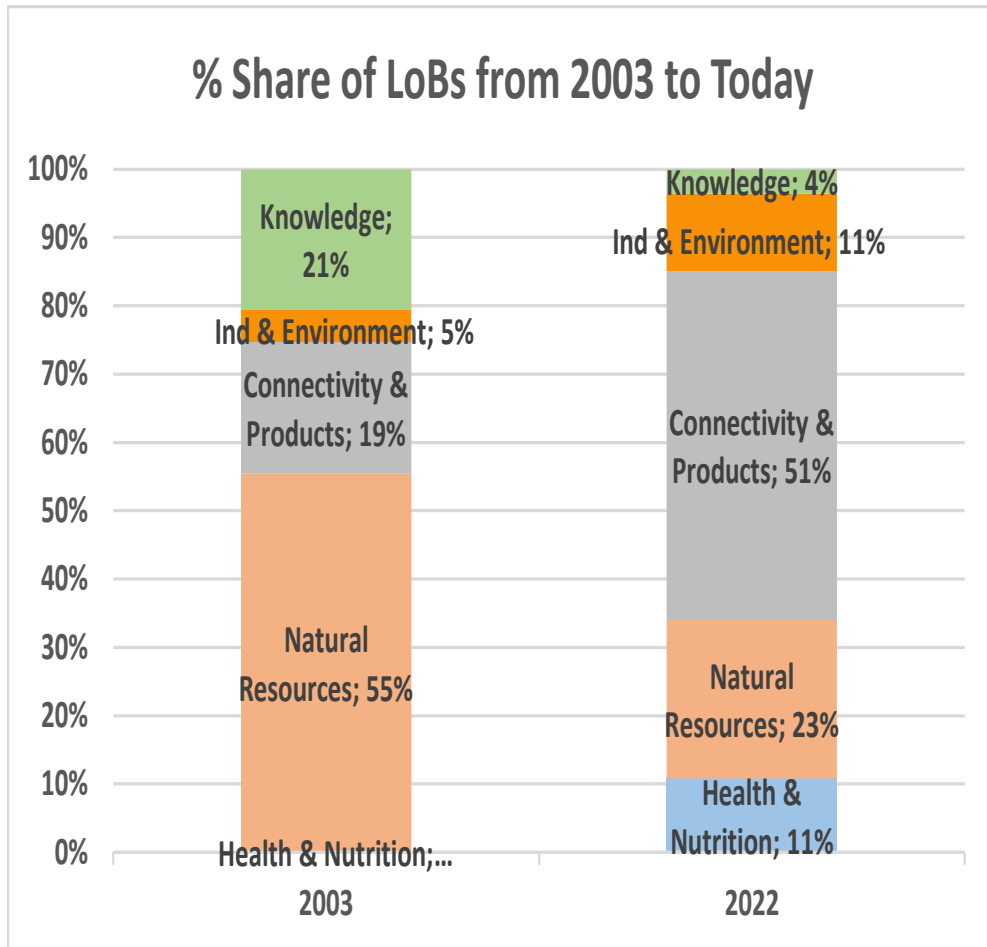
SGS Turkiye at a glance



68.6 million CHF annual revenue	+2.000.000 tests annually	%28 CAGR in revenue 2019-22
+1300 employees	★★★★★ In top 3 fastest growing SGS affiliate	+620.000 samples annually
18 labs in 19 locations		+15.000 sqm lab area
32% women employees	40% women in leadership	+6.500 active customers

- Strong block in SGS Group value chain serving global clients such as Inditex, Shell, H&M, Nestle, Ferrero, Carrefour, Siplec, C&A, Puma, Unilever and many others.
- Strong local presence in all business lines, one-stop-shop for customers such as Turkish Asset Fund, Arcelik, SiseCam, Sasa Polyester, Migros, Yayla Agro, Petkim / Socar and many others.
- Besides being the market leader in TIC industry by best practices, numerous accreditations to local and global agencies and helping the business community to align with global trends, SGS Turkiye is also an important contributor to society by social responsibility projects.

Evolution of portfolio



Today, we are far beyond our traditional grain inspection services; which was the initial line of business and exist in all industries with an extensive service portfolio.

Our service portfolio has evolved in line with; changes in the global business practices, digitalisation of the world and TIC market mega trends.

SGS Türkiye has reached its current scope by developing and transforming itself in parallel with all these global strategies.

Our contemporary portfolio consists services;

- Environmental due diligence, Holistic solutions for zero-discharge, marine ballast water analysis in relation with developments in Sustainability.
- Microbiological tests in food, cosmetics, textile, biocidals and waste-water in Health & Life science.
- Partnering with e-commerce platforms in product safety & reliability.
- Solutions for periodic controls for renewable energy production (solar & wind) sites.

Future prospects



Life science

Ambition to be market leader in BioAnalysis, BioEquivalence by integrating SGS Turkiye into SGS Global network in Life Science segment.



AC + AEO services

Expand service portfolio in Trade Facilitation segment through new investment in Authorised Consignor and Authorised Economic Operator licenses.



Renewable energy

Targeted to be a regional center of competency for renewable energy services by taking the advantage of high engineering quality as well as comparatively low labour costs in Turkiye.



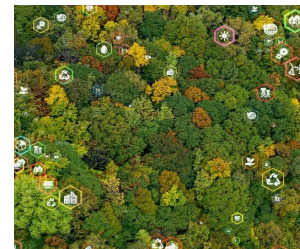
E-Commerce

Be the leading e-commerce product compliance service provider in region. Our expertise covers every aspect of compliance for a wide variety of consumer products.



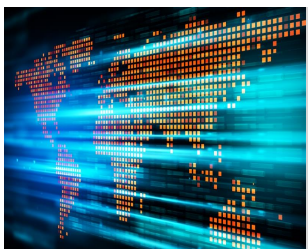
Rail industry

Enlarge services in railway industry to meet market demand driven by Turkiye's long-term railway investment plan of 13 billion EURO by 2035.



Sustainability Solutions

Aim to be a market leader on the sustainability services which is mainly driven by European Green deal and Net Zero emission targets of European Union.



Digitalization

To increase our business volume in a sustainable way by digitizing all possible processes and offering more efficient and more technological solutions.

Thank you!

