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THE TURKISH FOUNDRY  
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# Covid-19 Outbreak Impact Analysis

Metalcasting Industries in Turkey & Europe

*Covering End of April – Beginning of May*



-  /Turkish Foundry Association
-  /Tüdöksad @TurkDokum
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# Content

## 1. Current Situation in Turkish Metalcasting Industry

a) Foundries

b) Foundry Suppliers

## 2. Current Situation in EU Countries

Members  
only!



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# TÜDÖKSAD Survey Results

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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Foundries



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# Raw Material Supply

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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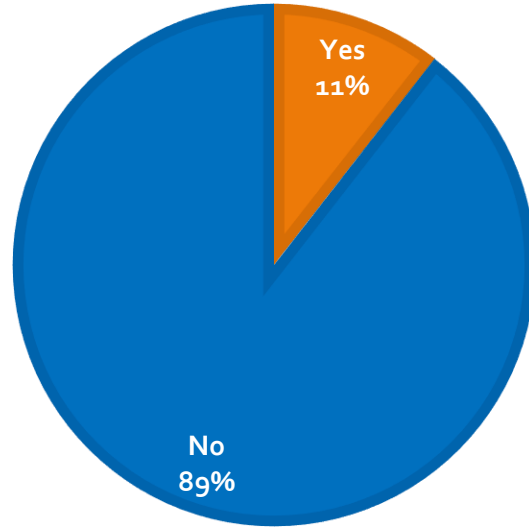
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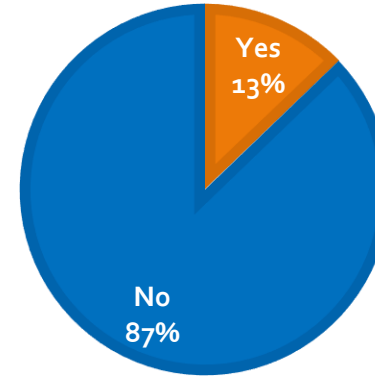
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Have you encountered any problems in terms of raw material supply during the outbreak?

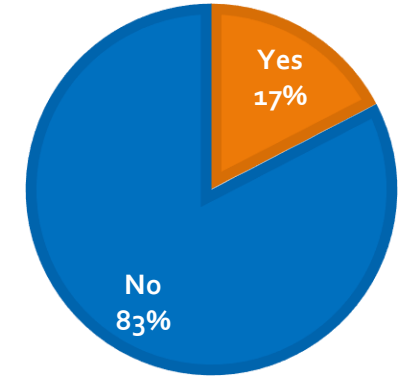
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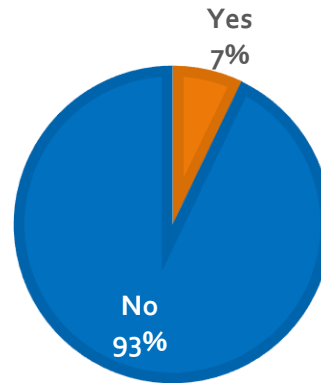
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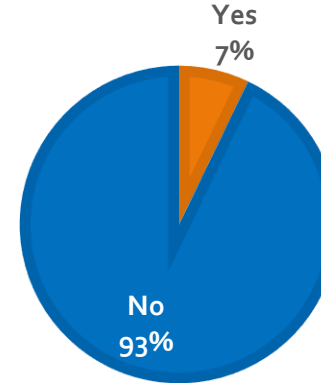
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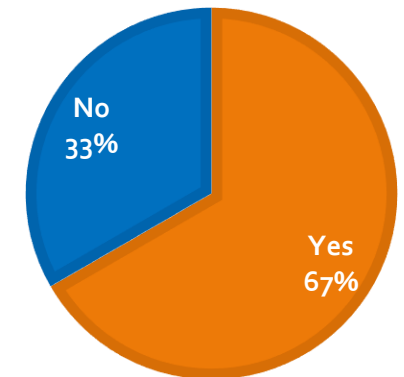
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# Raw Material Supply

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## Items with supply problems

### Alcohol (IPA)

- Iron and steel foundries
- Excessive price increase

### Steel scrap

- Iron and steel foundries
- Although it is still a problem for some foundries, it has been partially eased.
- Excessive price increase, due to production cut-offs and slow downs in manufacturing industries

### Ferro Alloys

- Iron and steel foundries
- Although it is still a problem for some foundries, it has been partially eased.

### Extended delivery times in imported products

- Investment casting foundries

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# Raw Material Supply

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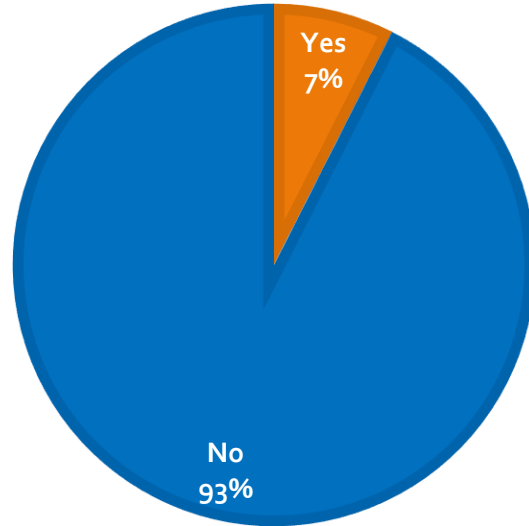
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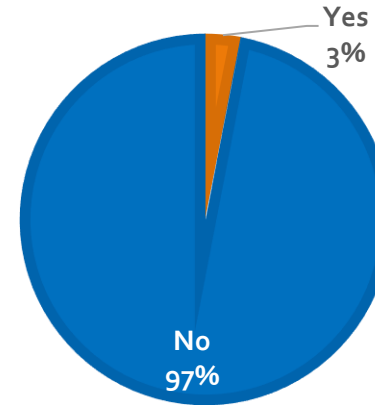
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Do you anticipate any problems in this regard in the short term?

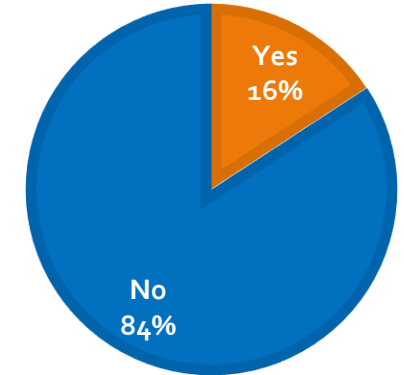
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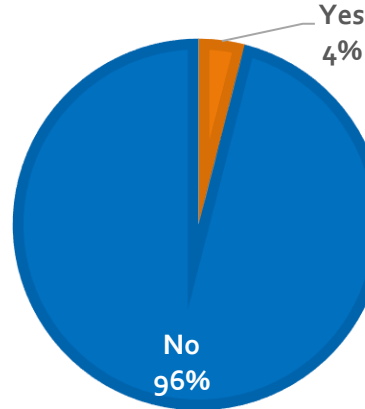
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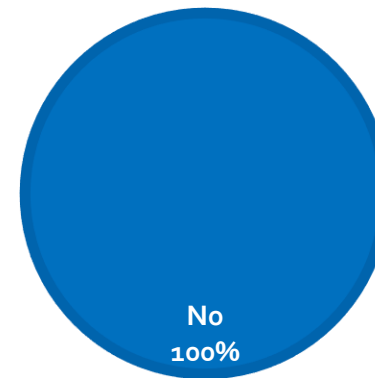
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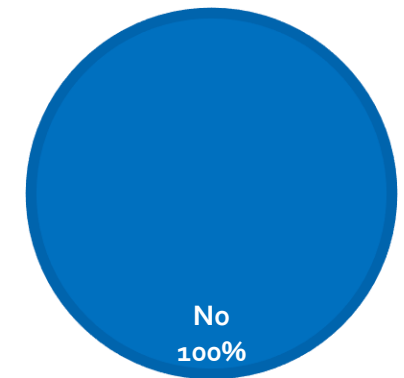
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# Raw Material Supply

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If yes, in which items?

## Alcohol (IPA)

- Steel foundries

## Steel scrap

- Iron and steel foundries
- Depending on the normalization period

## Ferro Alloys

- Steel foundries
- Possible problems on products imported from China

## Overview

- Foundry suppliers shifting their sales to large volume buyers due to falling orders
- Problems may occur in raw material supply starting from June

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# Personal Protective Equipment Supply

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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Foundries



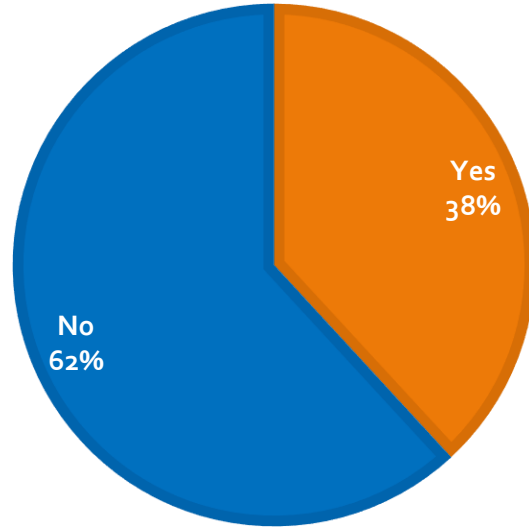
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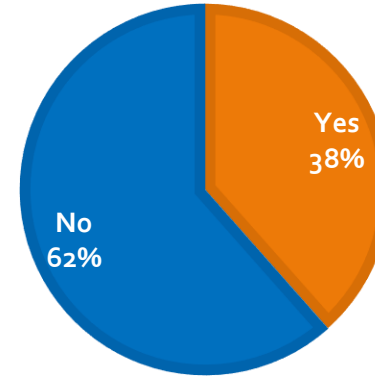
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Have you encountered any problems in terms of PPE supply during the outbreak?

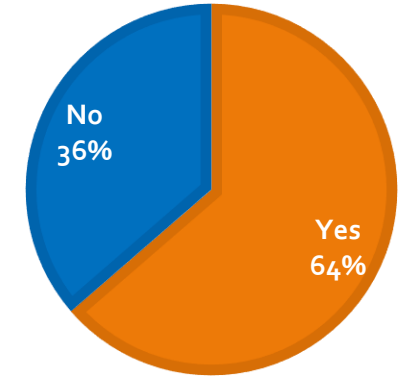
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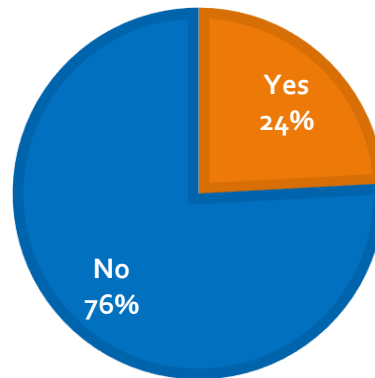
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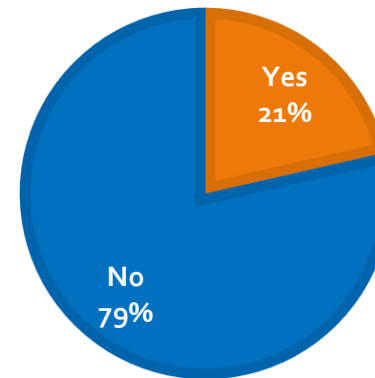
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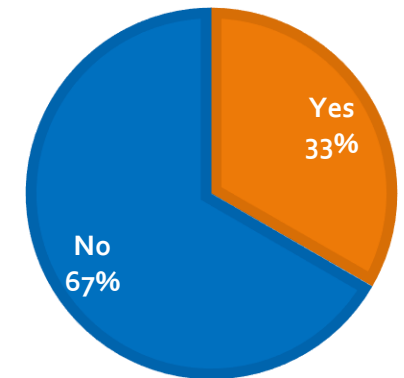
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# Personal Protective Equipment Supply

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## How did you resolve the problem?

Organized Industrial Zone Administrations provided surgical masks (which is not suitable for foundries, 2 per each employee). Delivery times are very long.

MESS-Turkish Employers' Association of Metal Industries created an online portal to provide masks to its members

Governorate made a query for monthly demand. However, they sent less than 5% of the requested amount.

It was provided without invoice in order to avoid any official sales and punishment.

Due to exorbitant prices, the purchase of dust mask was stopped and handled with medical masks.

Stocking (One of our members donated its medical mask stock to the Ministry by re-accessing the appropriate mask sources)

Activated carbon reusable masks

Masks were distributed to employees in certain numbers and embezzled in monthly basis.

Although it is still a problem for some foundries and prices are still high, it has been partially eased

Excessive prices in gloves as well

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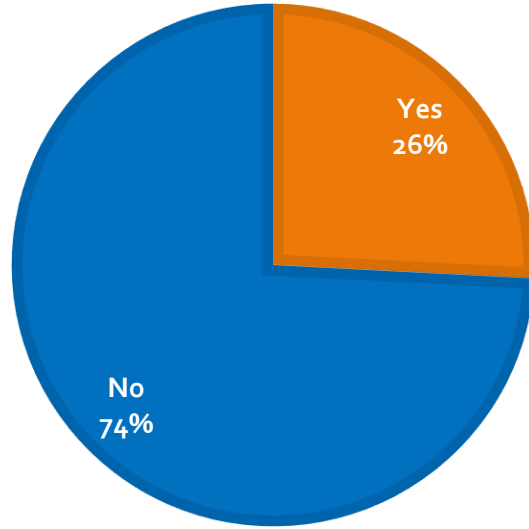
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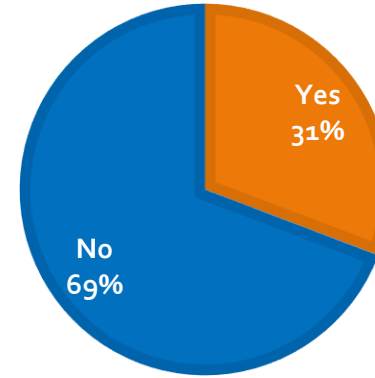
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Do you anticipate any problems in this regard in the short term?

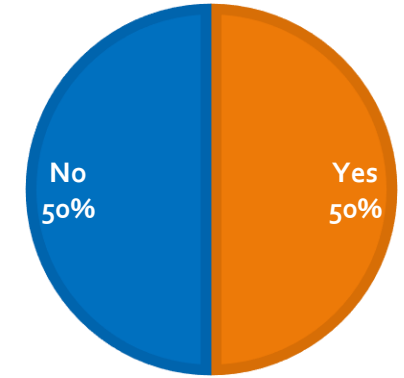
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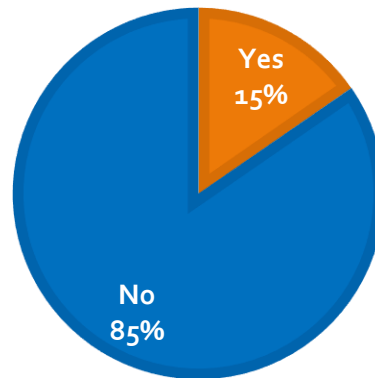
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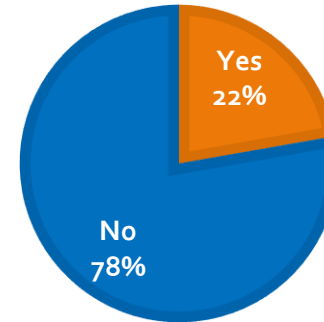
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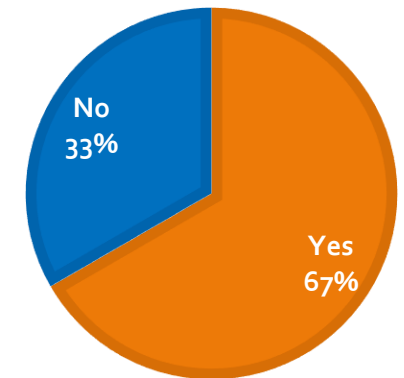
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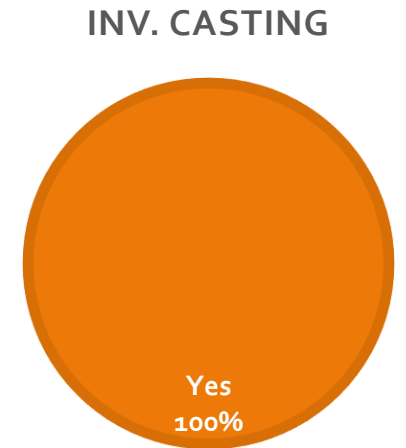
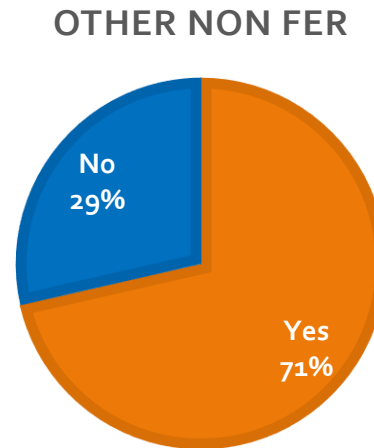
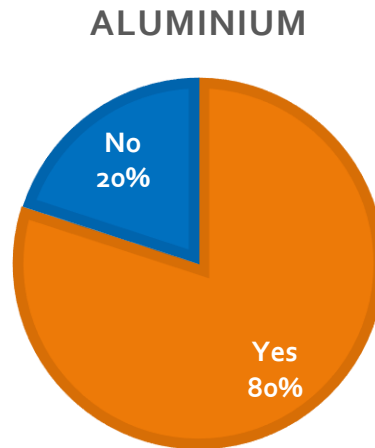
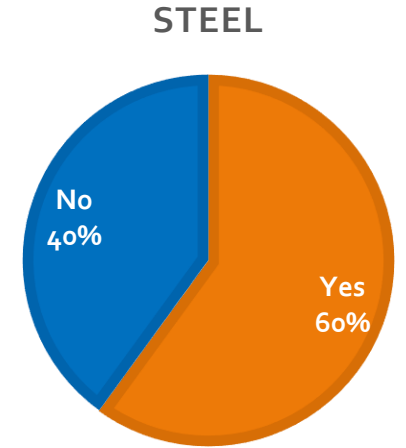
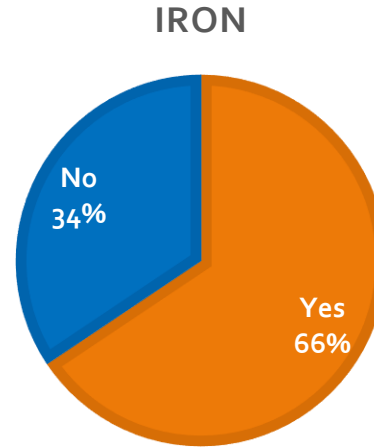
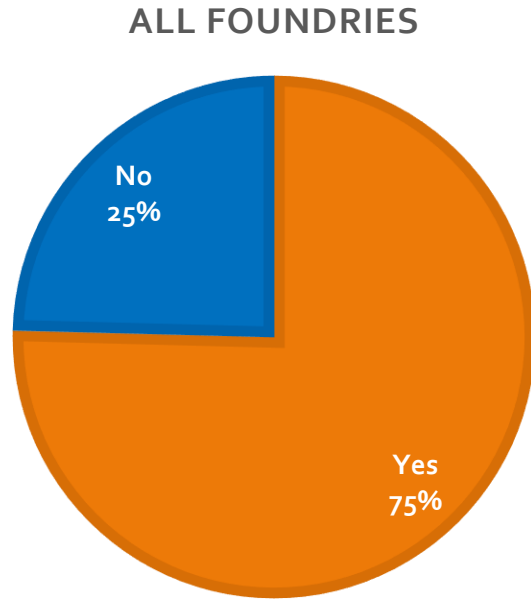
# Domestic Orders

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Have you encountered any cancellation/postponement of orders from domestic buyer sectors?



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# Domestic Orders

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If yes, which sectors?

## Iron foundries

- Agriculture/tractor (postponements), automotive (mostly postponements), white goods, construction (postponements), elevator, pump, infrastructure, electric motor (at very low levels), stove, medical, machinery, hydraulic, mining (at very low levels)

## Steel foundries

- Energy (postponements), machinery, medical, defense and aviation (at low levels), steel shots, mining (at very low levels)

## Aluminium foundries

- Automotive (mostly postponements), machinery, white goods, medical, electric, radiators

## Other non ferrous foundries

- Machinery, automotive, white goods, medical, electric, radiator

## Investment casting foundries

- Machinery, medical (at high levels), defense and aviation (at very low levels), automotive

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# Domestic Orders

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In which buying sectors there were no significant cancellation/postponement?

## Iron foundries

- Automotive, agriculture/tractor, machinery, valve, marine, heavy industry machinery frames, wind turbine, defense and aviation, cement, mining, energy

## Steel foundries

- Cement, machinery, earth mover (crusher/grinder), defense and aviation, agriculture/tractor, quarry, concrete plants, mining, iron-steel, energy

## Aluminium foundries

- Energy, defense and aviation, automotive, white goods, lighting, tractor, medical, safety

## Other non ferrous foundries

- White goods, lighting, defense and aviation, medical

## Investment casting foundries

- Defense and aviation



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# Export Orders

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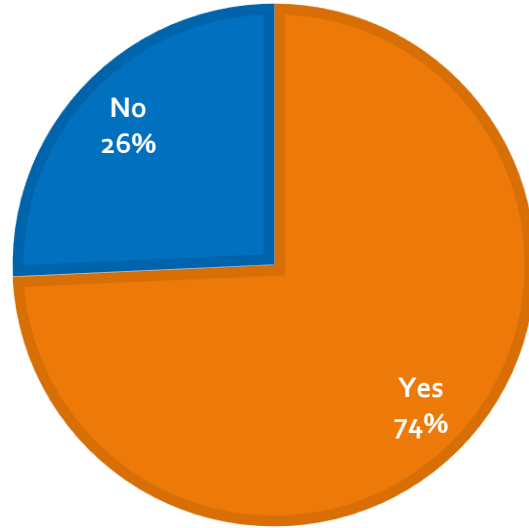
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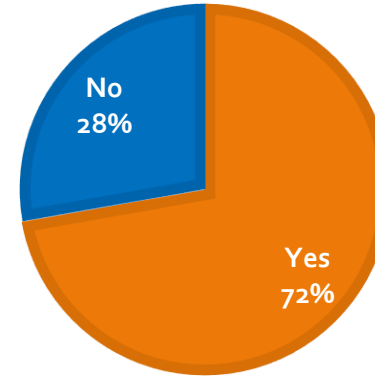
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Have you encountered any cancellation/postponement of orders from foreign buyer sectors?

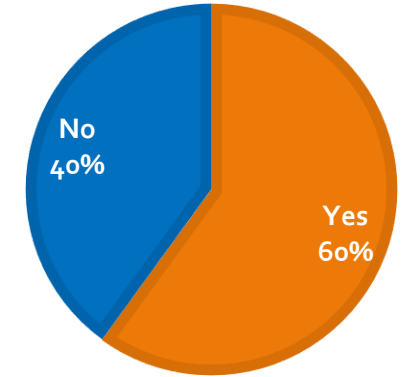
ALL FOUNDRIES



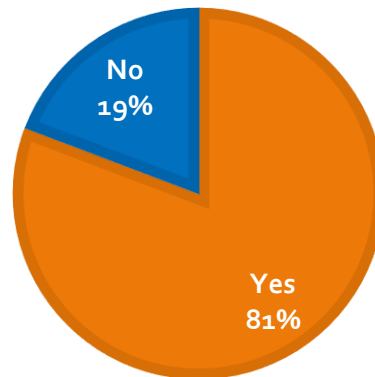
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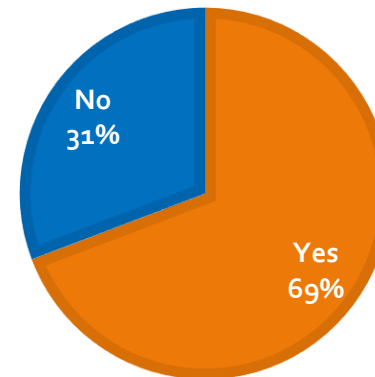
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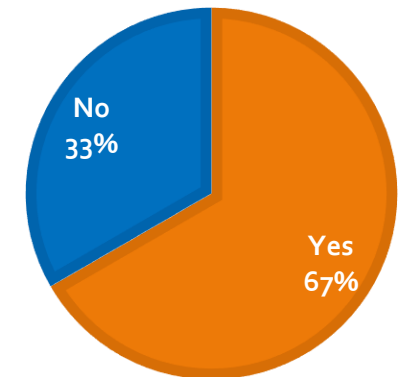
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# Export Orders

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## Foundries

## If yes, which sectors?

### Iron foundries

- Agriculture/tractor (postponements), automotive (postponements at high levels), white goods, construction (postponements), infrastructure (postponements at high levels), machinery (postponements at high levels), pump (postponements), railways, earth movers and counter weights (postponements at high levels), aviation (postponements), mining (postponements), energy (postponements)

### Steel foundries

- Agriculture/tractor (postponements), construction (postponements), mining (postponements), automotive (postponements at high levels), aviation (postponements), machinery (postponements)

### Aluminium foundries

- automotive (postponements at high levels), railways, aviation (postponements), white goods, pressure filter, electric

### Other non ferrous foundries

- automotive, machinery (postponements at high levels), aviation (postponements), electric, filter

### Investment casting foundries

- automotive (postponements at high levels), aviation (postponements), machinery (postponements)

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# Export Orders

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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Foundries

In which buying sectors there were no significant cancellation/postponement?

## Iron foundries

- cement, machinery, automotive, agriculture, construction, quarry, valve, marine, heavy industry machinery, wind turbine, mining, iron-steel, energy, electric motor, earth mover, railways

## Steel foundries

- cement, machinery, mining, quarry, concrete plant, valve, pump, iron-steel, energy, agriculture, railways, earth movers (crusher/grinder)

## Aluminium foundries

- Energy, defense (mostly Germany), valve, pump, machinery

## Other non ferrous foundries

- Defense

## Investment casting foundries

- Valve, pump, machinery





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# Sales Decline Due to the Outbreak

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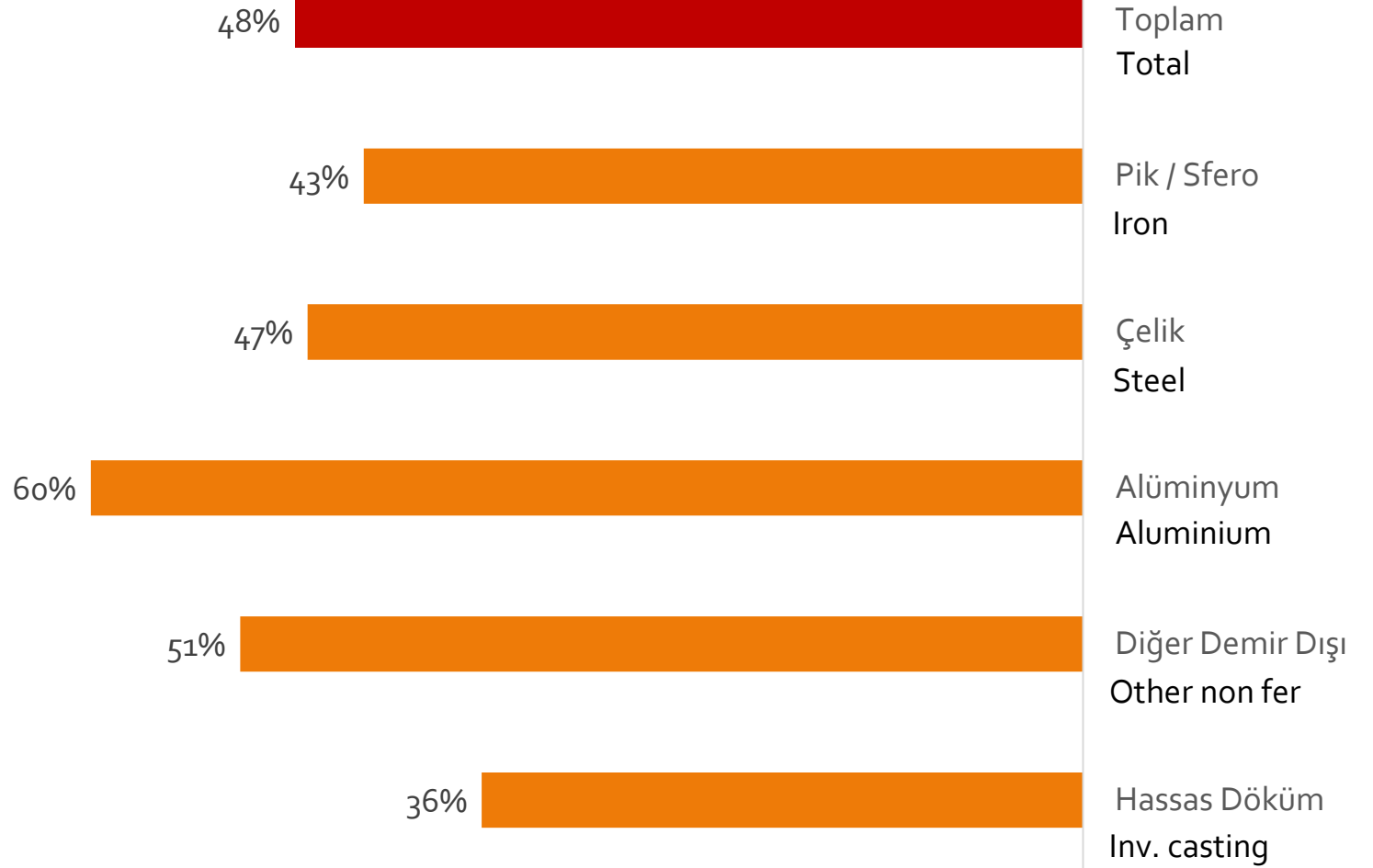


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Current sales decline due to the outbreak\*



\* Formulated and weighed in accordance with the production capacities

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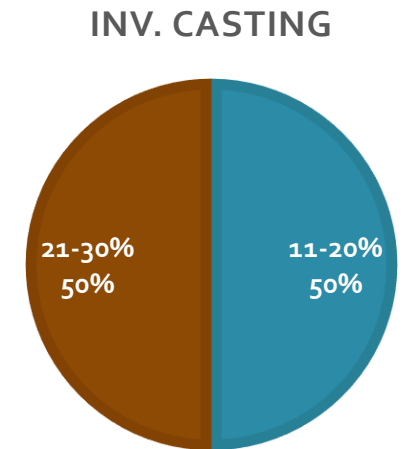
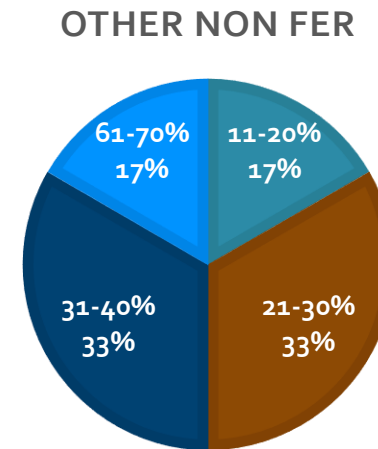
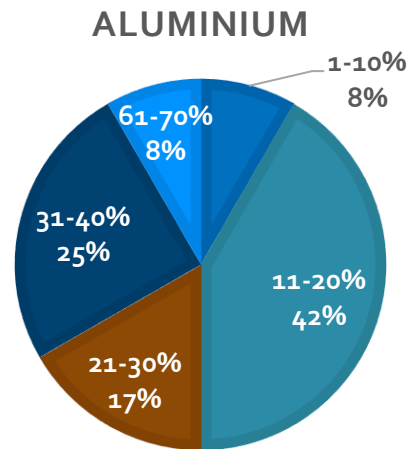
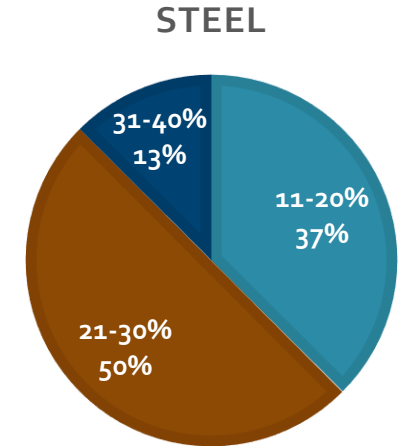
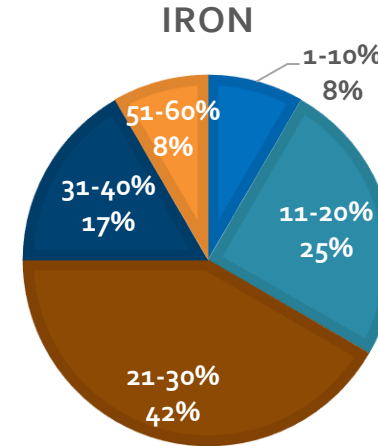
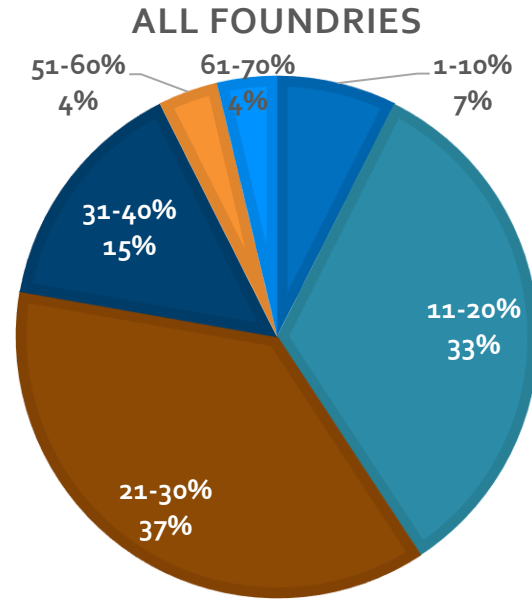


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## Annual sales decline anticipation



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# Product Shipments

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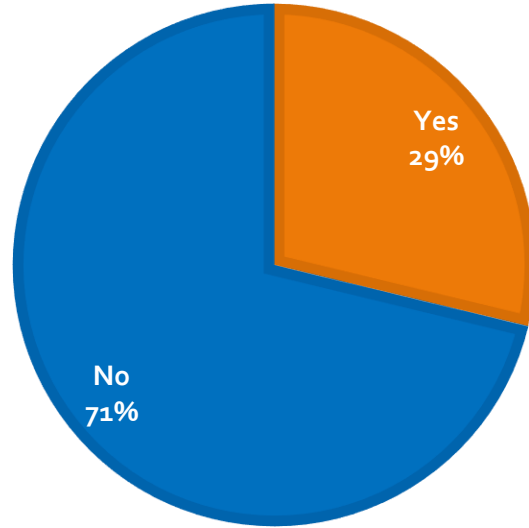
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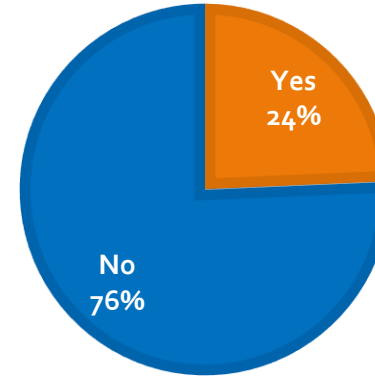
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Have you encountered product shipment problems?

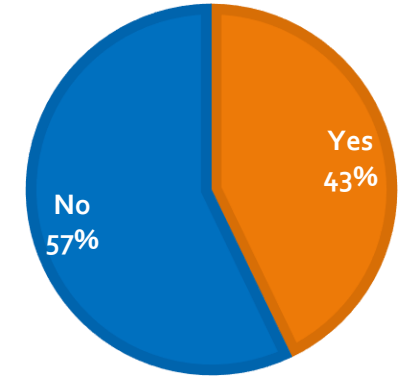
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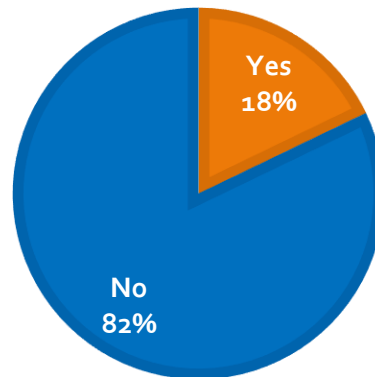
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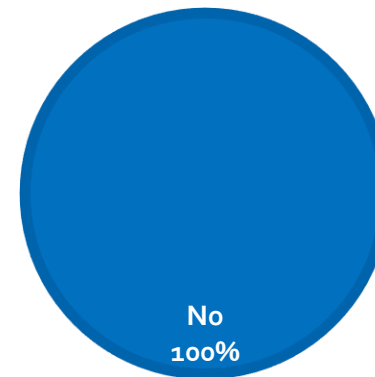
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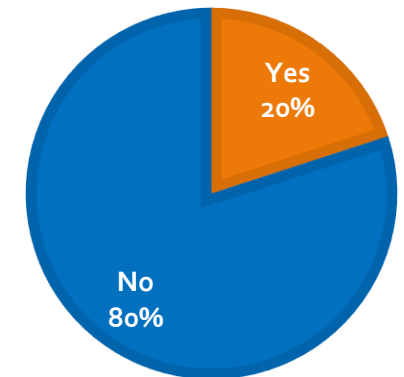
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# Sickness Absence of Staff

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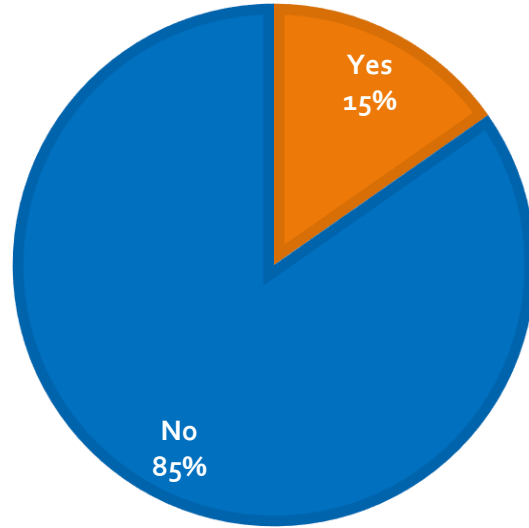
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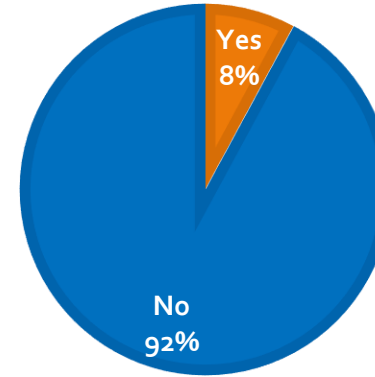
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Have you had production loss due to the sickness absence of staff?

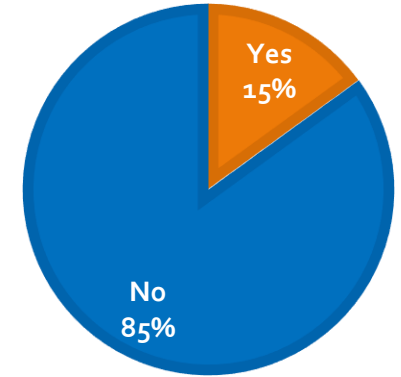
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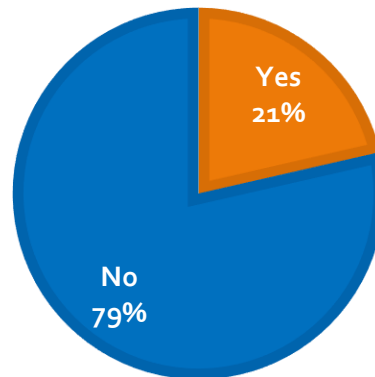
IRON



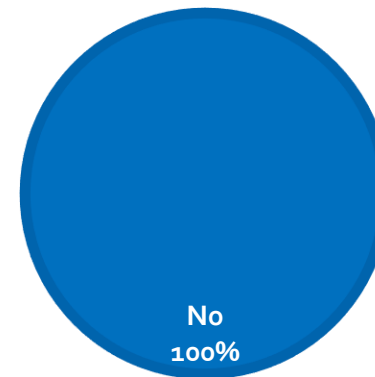
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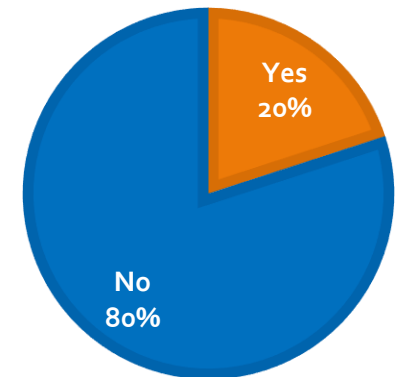
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# Production Cut-off

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries



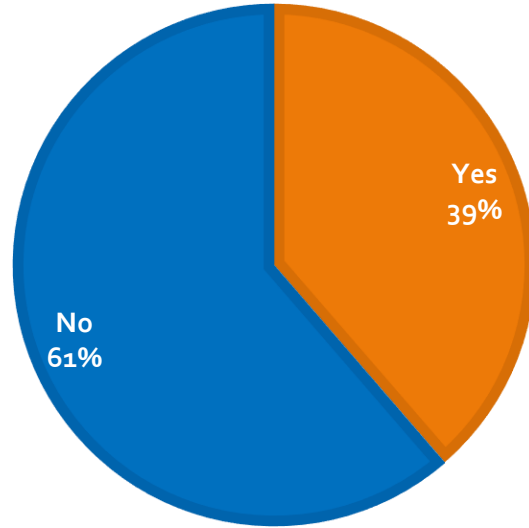
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Organization



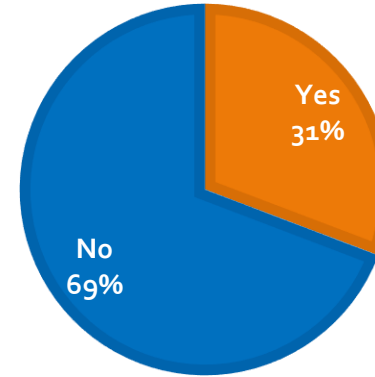
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Have you stopped your production during the outbreak?

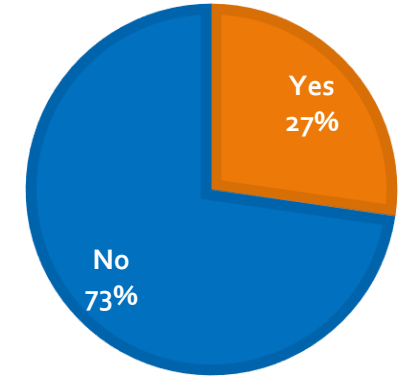
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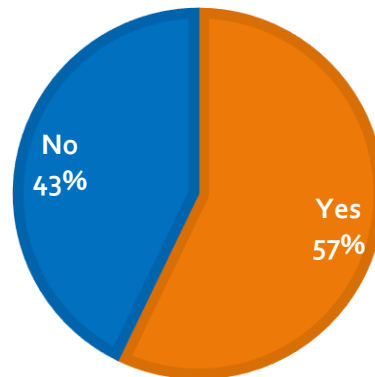
IRON



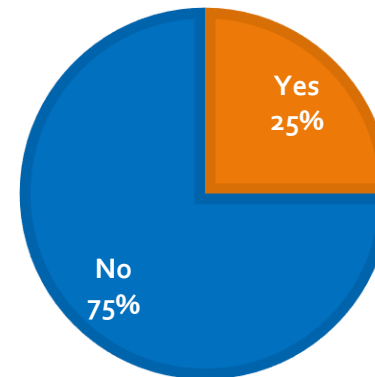
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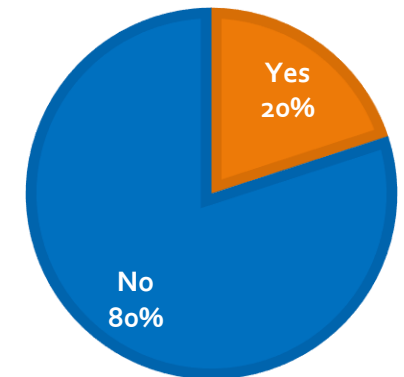
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# Production Cut-off

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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Foundries



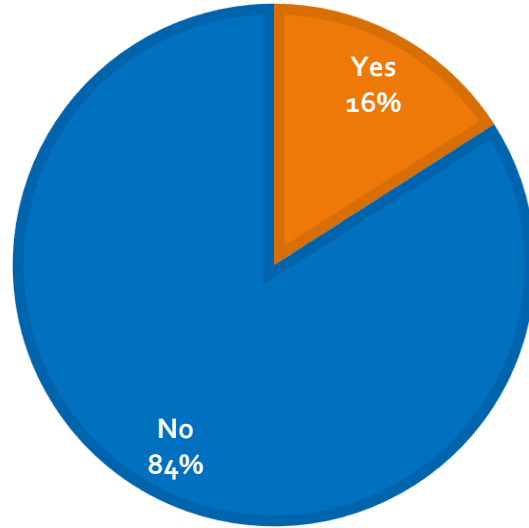
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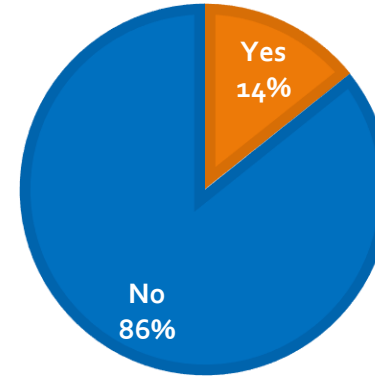
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Are you planning to stop production in the near future?

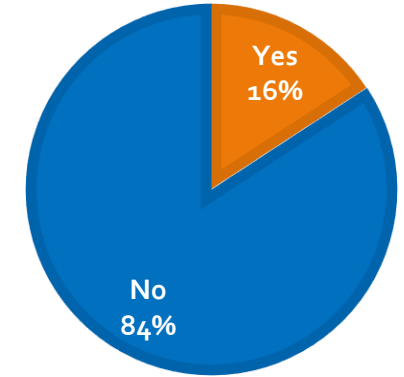
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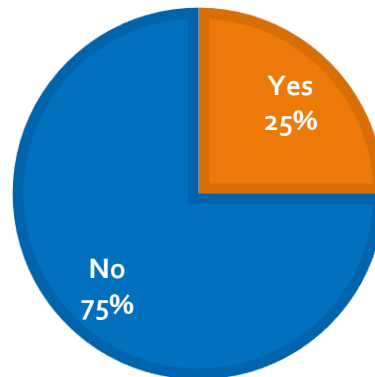
IRON



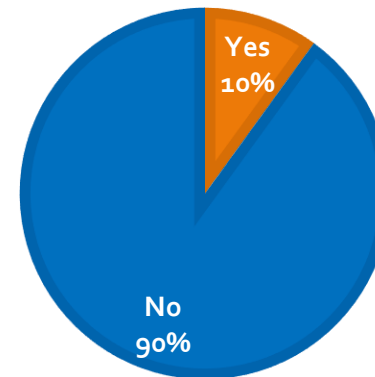
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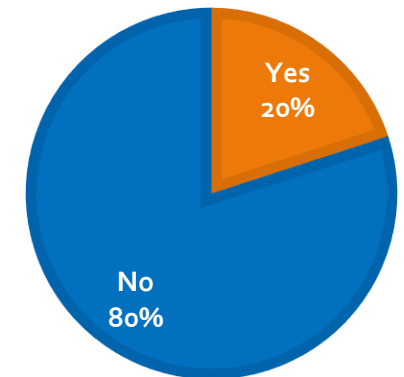
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# Production Cut-off

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries

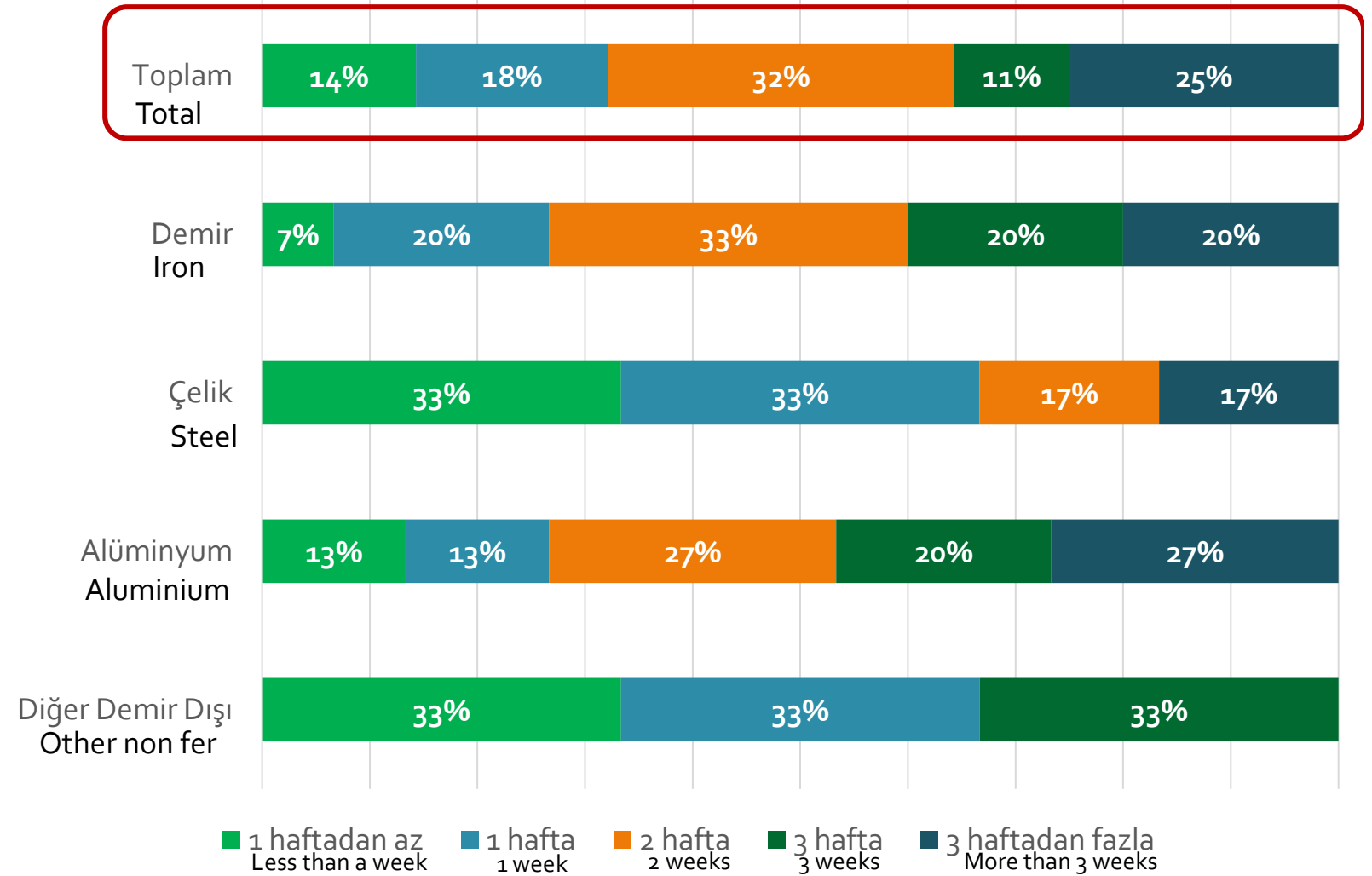


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If you temporarily stopped production, how long was that period?



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# Curfew Exceptions

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries



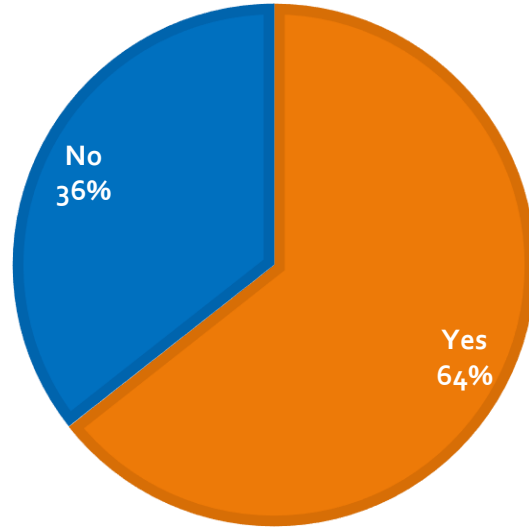
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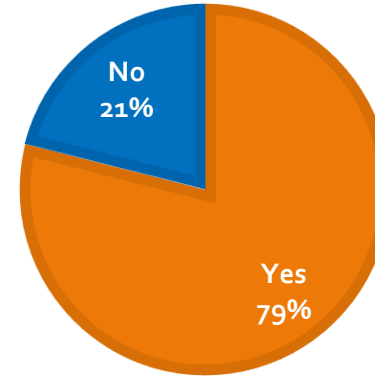
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Have your facility utilized the curfew period exceptions to continue its operations?

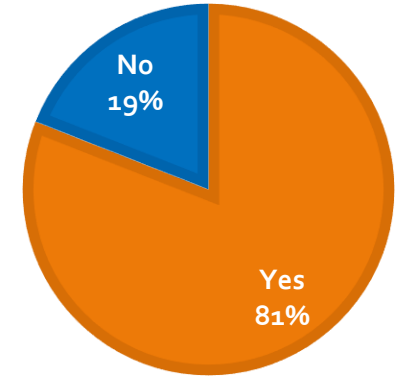
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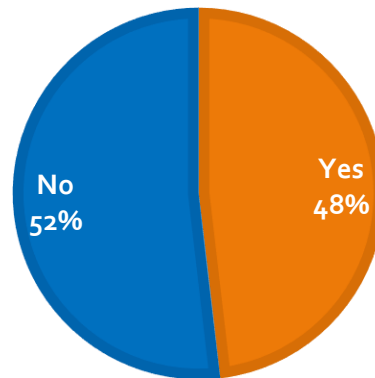
IRON



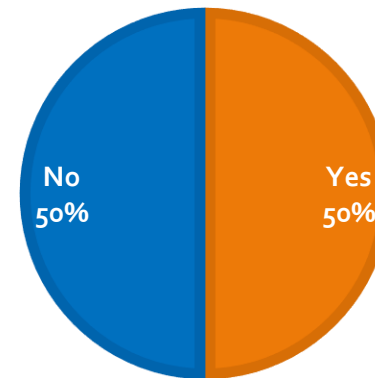
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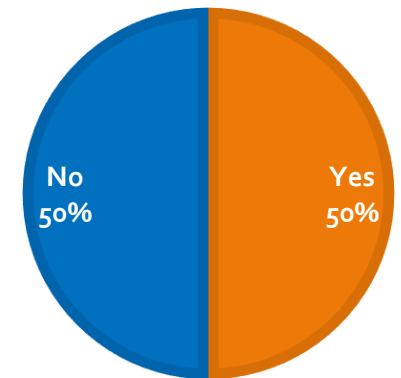
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# Curfew Exceptions

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries



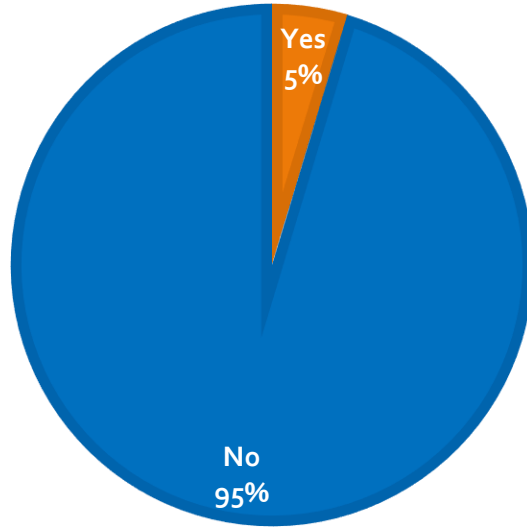
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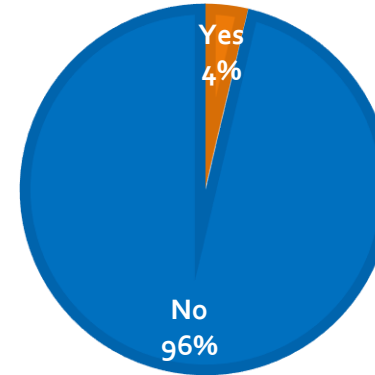
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Have you encountered any problems during the application and execution periods?

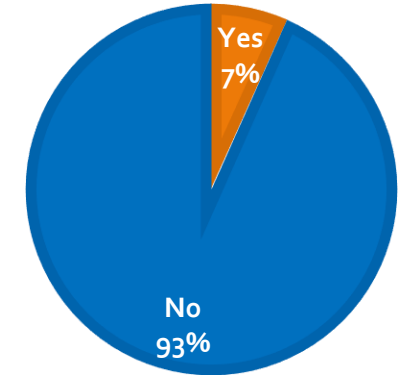
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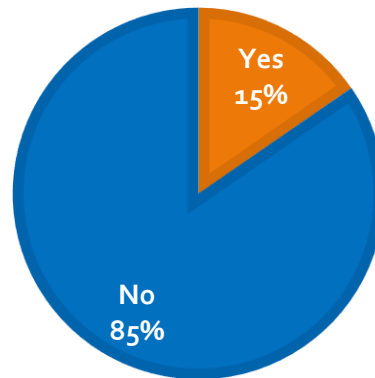
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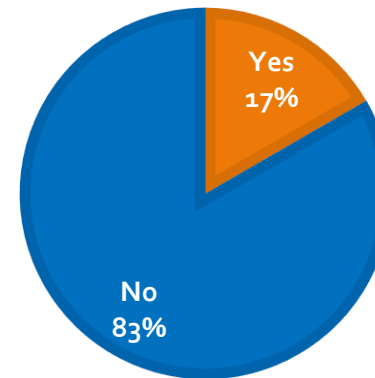
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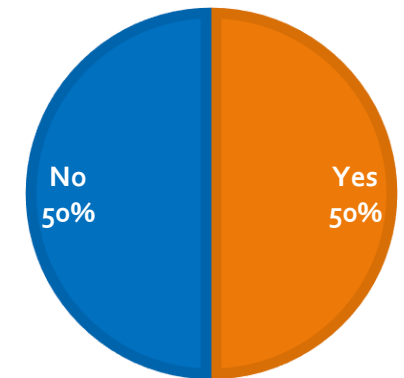
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# Curfew Exceptions

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If yes, what kind of problems?

Since the application procedures were not clearly defined in the published circulars, the problems were mostly experienced during the application process.

There were many different applications across the country.

In some districts, district governorships responded to the applications, while others did not.

Applications were made through the appropriate ones from the district governorships or governorates.

In some cities, the permitting process was carried out through OIZs or Chambers of Commerce.

Together with TÜDÖKSAD, chambers of industry and exporters' associations also provided information and guidance.

Implementing the social distance rules led to an increase in transportation costs.

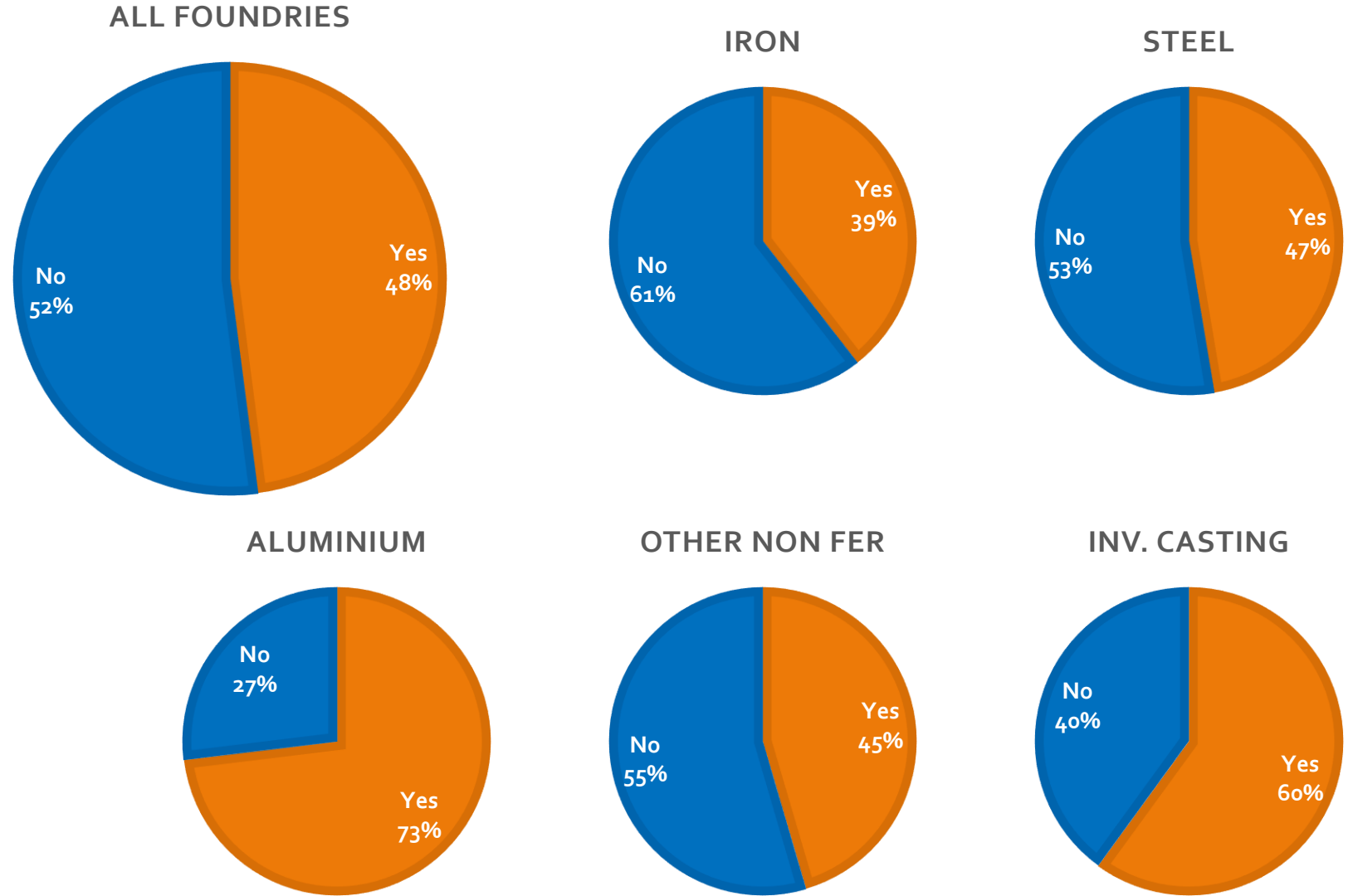
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# Short-time Work Allowance

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## Have you applied for the short-time work allowance?



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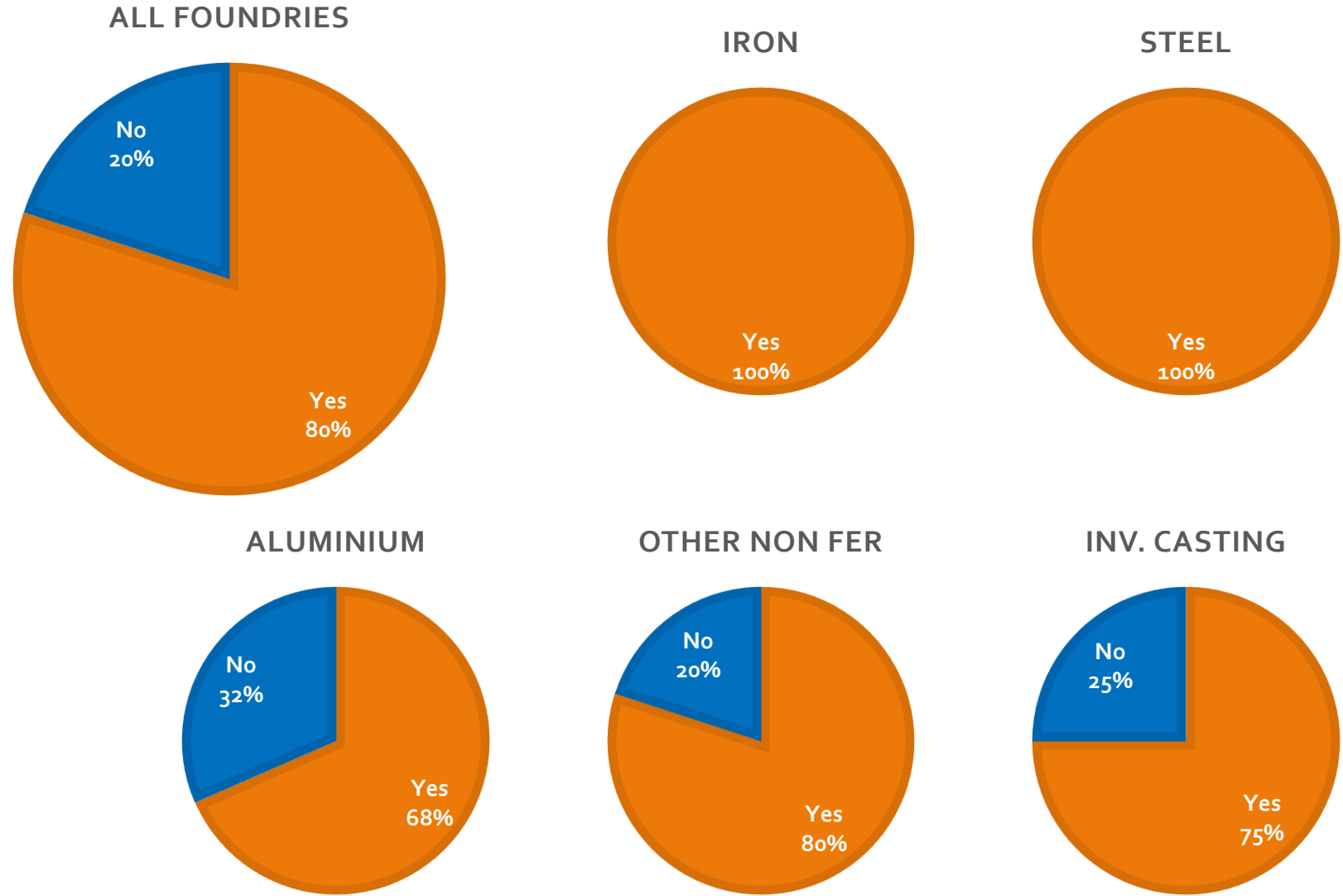


# Short-time Work Allowance

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If yes, have you implement short-time working system?



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## Short-time Work Allowance

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If yes, since when?

Small number of foundries have started at the end of March.

Companies that received approval and started short time working mostly gather in the second half of April.

Some foundries is planning to start at the beginning of May.

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# Unpaid leave

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries



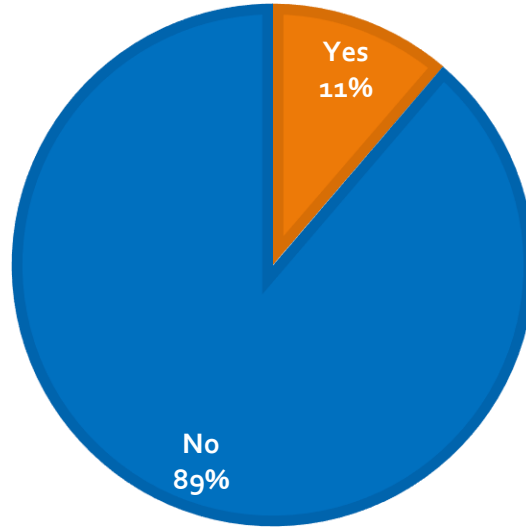
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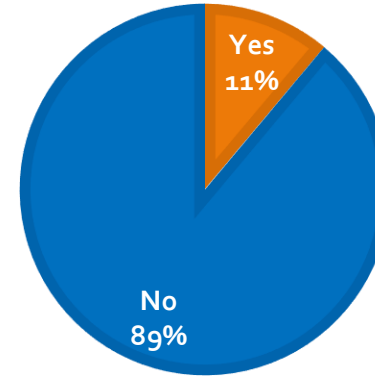
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Have your company announced unpaid leave for employees?

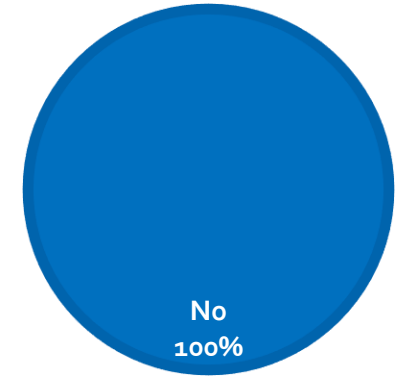
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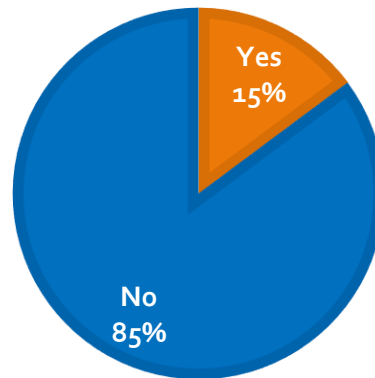
IRON



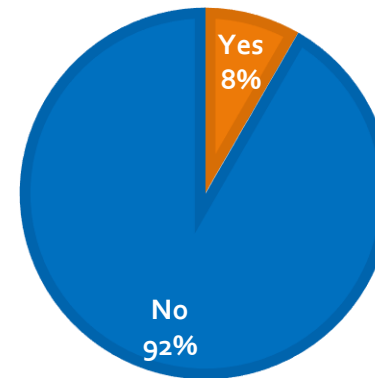
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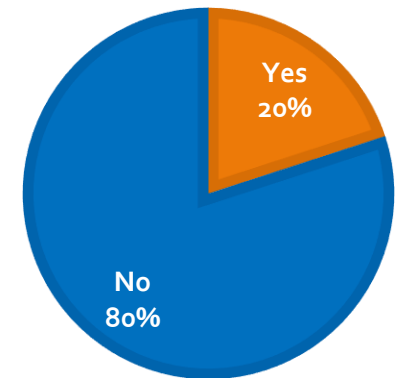
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# Other Industry Support Programs

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries



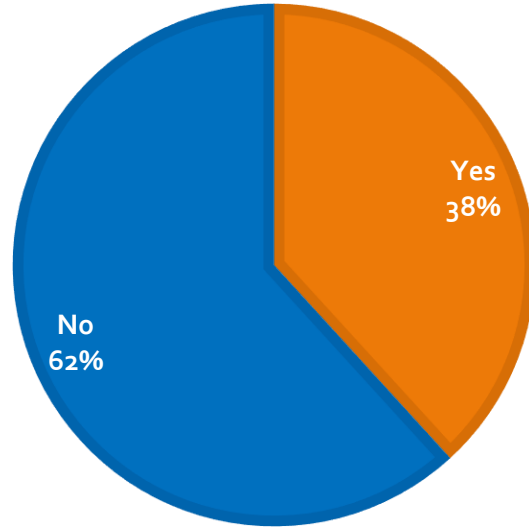
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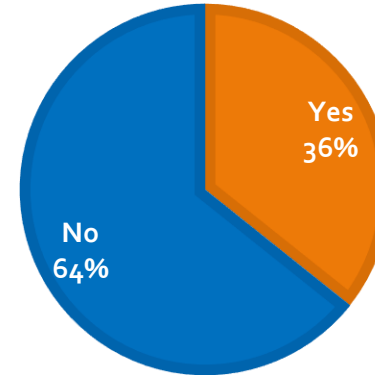
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Have you applied for other industry support programs provided by the government?

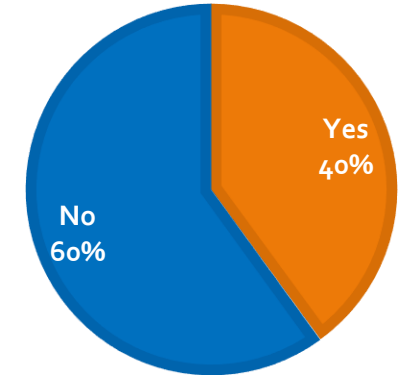
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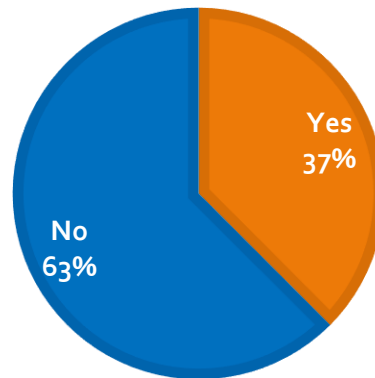
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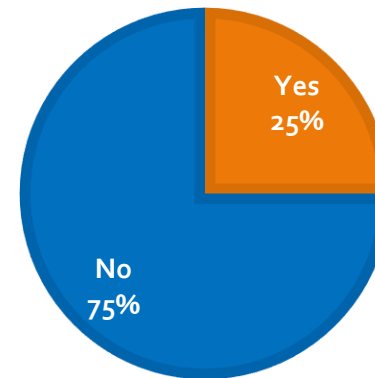
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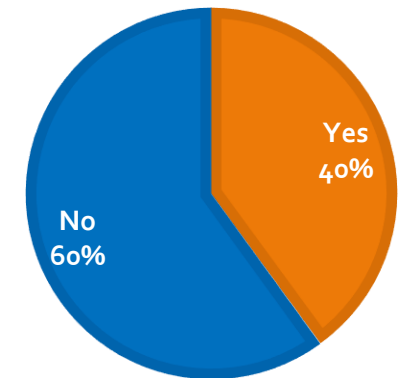
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## Other Industry Support Programs

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries

If yes, which programs?

Tax / insurance delay within the  
Economic Stability Shield Package

KGF (Credit Guarantee Fund) support  
with a 6-month grace period

Other credit supports

Credit delays (Deferred by banks  
without application, KOSGEB etc.)

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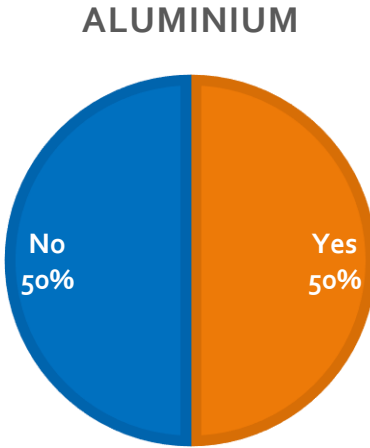
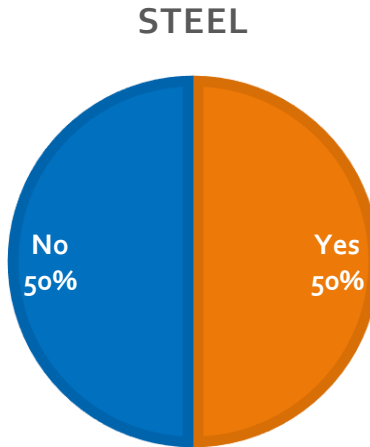
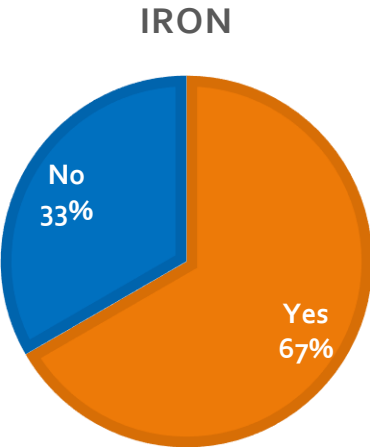
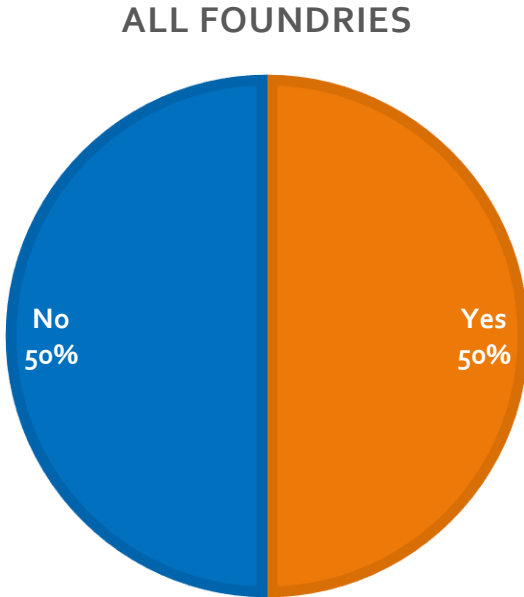


Have you encountered any problems during the application and implementation process?

# Other Industry Support Programs

COVID-19 Outbreak Impact Analysis, Turkish Metalcasting Industry

Foundries



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## Other Industry Support Programs

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

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If yes, what kind of problems?

Getting offered lower amounts than applied due to lack of resources and therefore unfulfillment of the demands

High interest rates

Since SMEs are prioritized in the support loans announced by public banks, the applications of large foundries are still waiting approvals.

Short-time working fund application procedures are too complex for small size foundries.

Inclusive new support packages should be announced, for those who could not apply for the announced programs.

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# Impact of the Outbreak on Metalcasting Business

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

Foundries

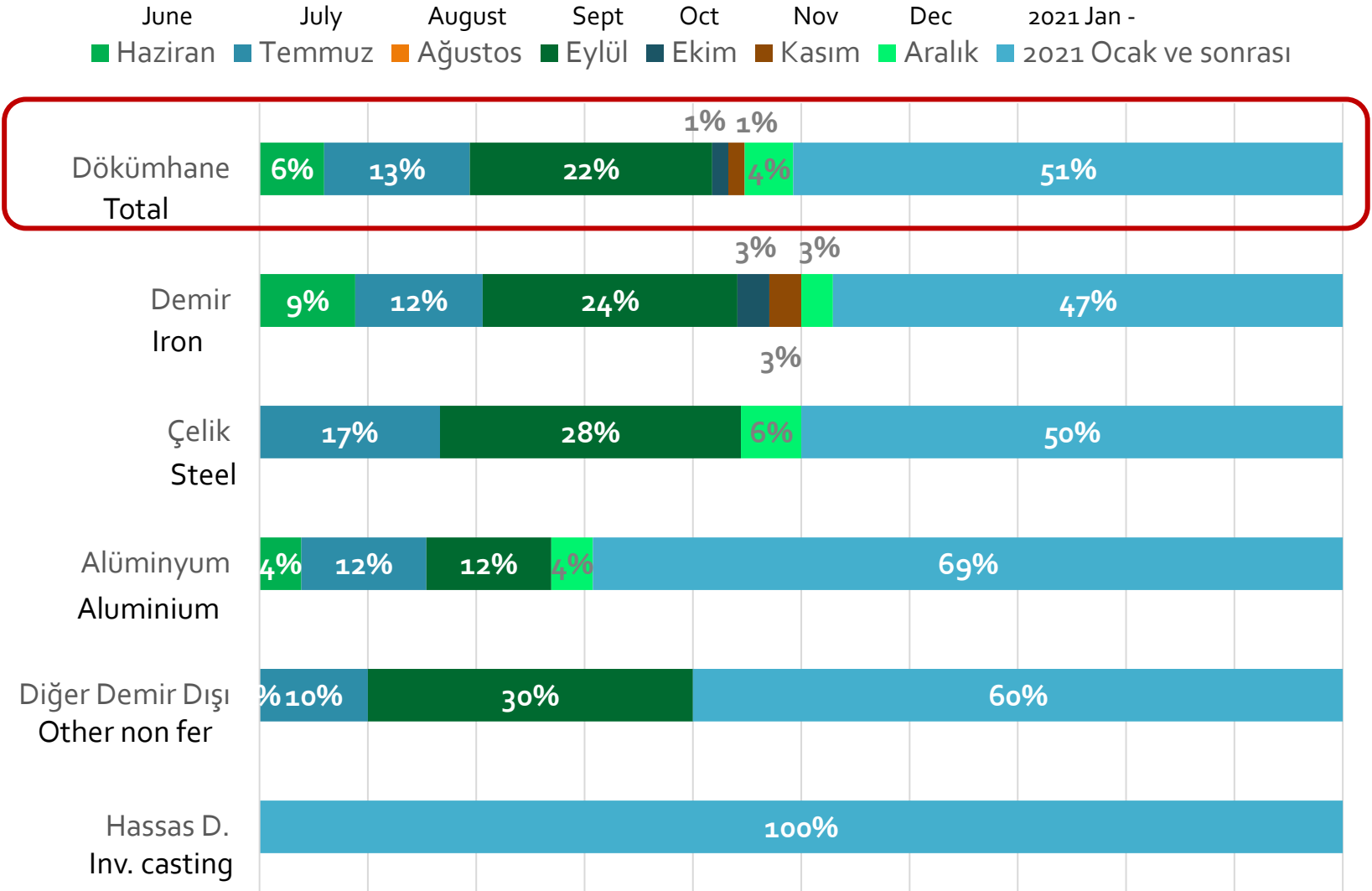


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When do you think the impact of the outbreak on business volume will end?



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# TÜDÖKSAD Survey Results

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# Supply Chain

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Analysis, Turkish Metalcasting  
Industry

Foundry Suppliers



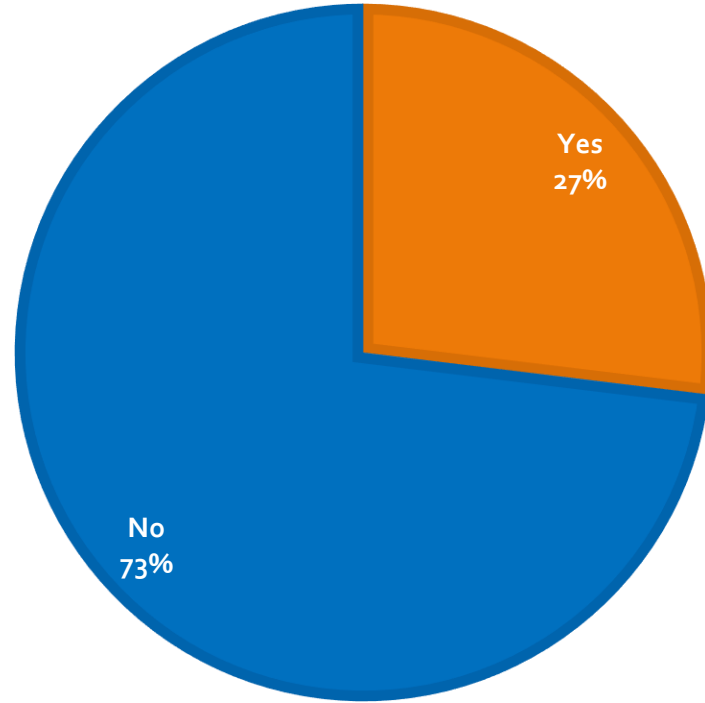
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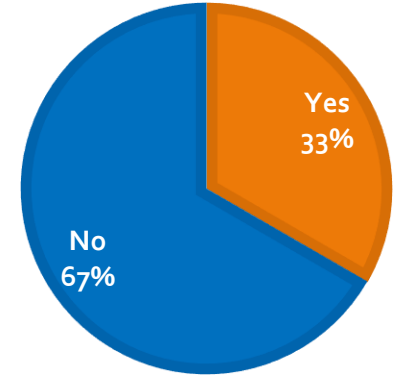
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Have you encountered any problems in terms of raw materials/consumables/equipment supplies during the outbreak?

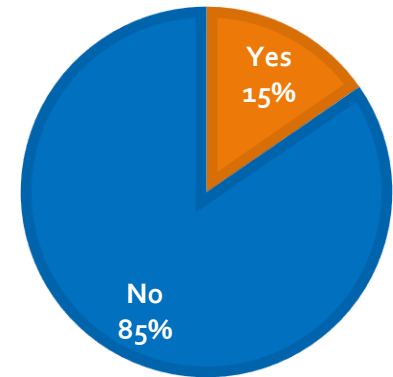
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## Supply Chain

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

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## Items with supply problems

### Manufacturers

- Cooling pipes (short term)
- Electronic components (short term)
- There was a problem due to the production slow downs in manufacturing industries.

### Representatives

- Shipping problem, especially from Europe, the UK and China, is the major issue in the supply of all items.
- Production slowdowns and quarantines at customs are the other factor
- Since the Metalcasting production has declined, there has not been any important breakdowns.

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# Supply Chain

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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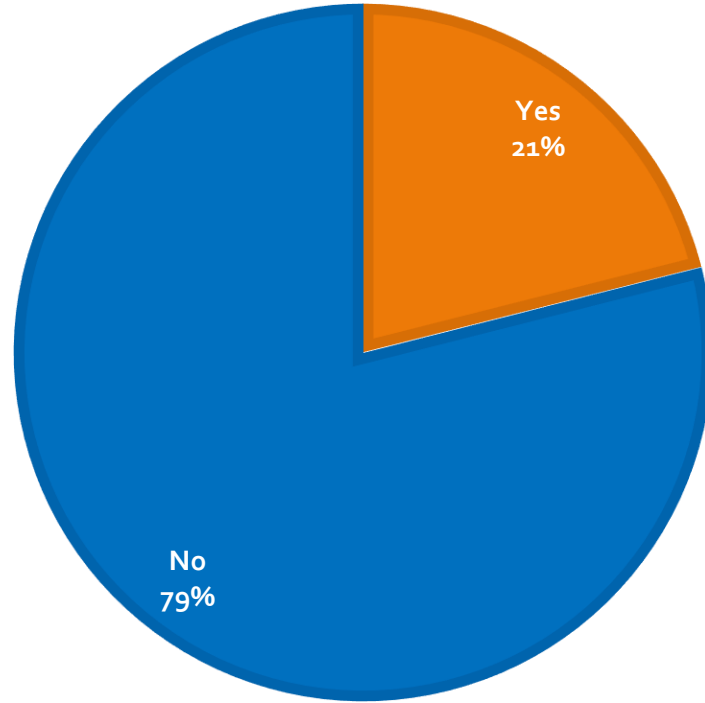
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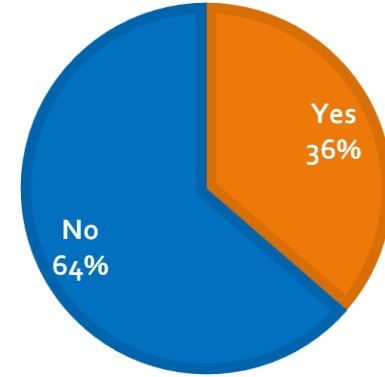
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Do you anticipate any problems in this regard in the short term?

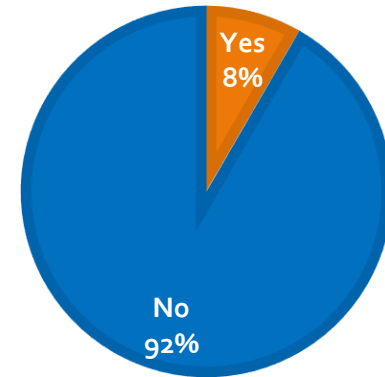
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## Supply Chains

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If yes, in which items?

If the production capacity does not increase in June-July, there would be problems in the scrap supply.

Due to the volatility in the exchange rates, import problems may occur.

There may be problems with machine spare parts coming from abroad.

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# Personal Protective Equipment Supply

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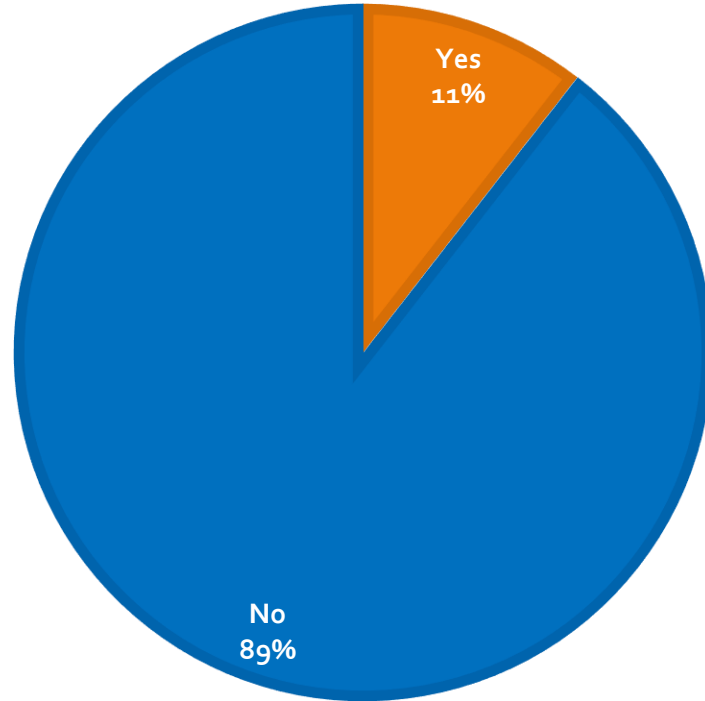
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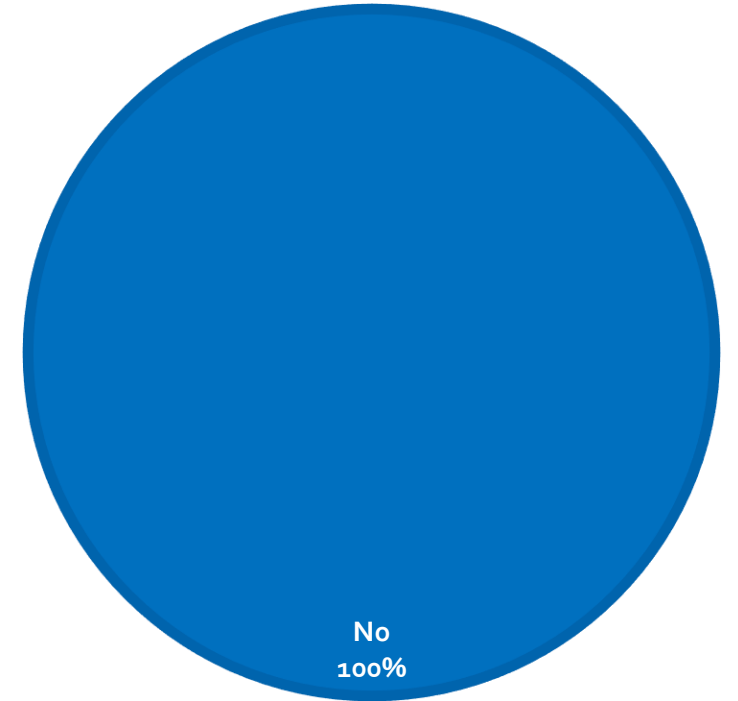
Have you encountered any problems in terms of PPE supply during the outbreak?

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Do you anticipate any problems in this regard in the short term?

SUPPLIERS



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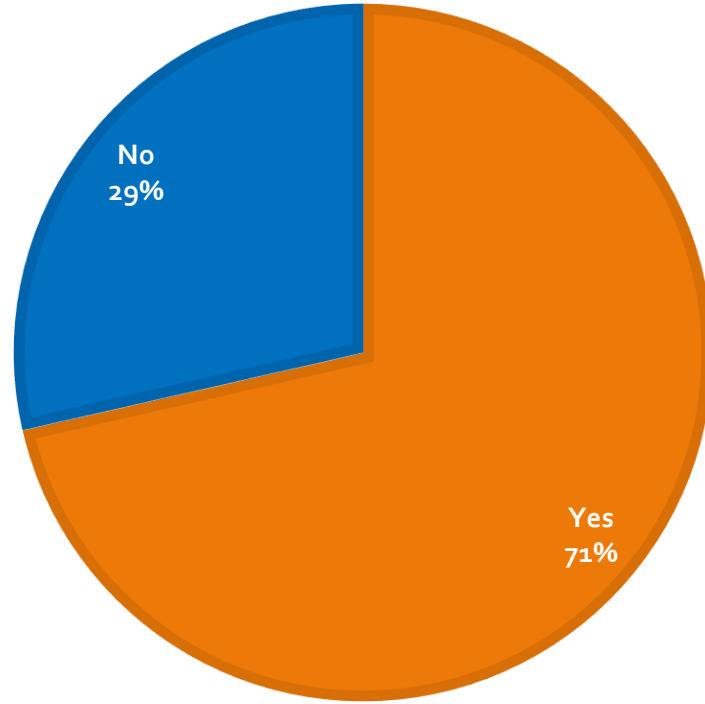
Have you encountered any cancellation/postponement of orders from domestic buyer sectors?

# Domestic Orders

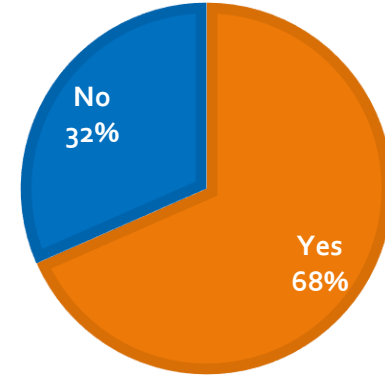
COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

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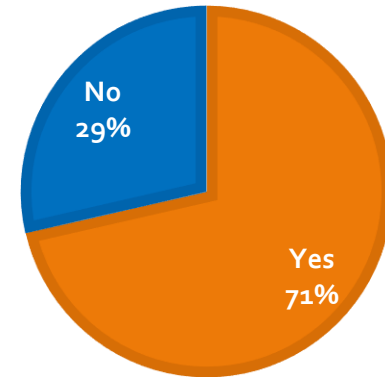
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Have you encountered any cancellation/postponement of orders from the metalcasting sector?



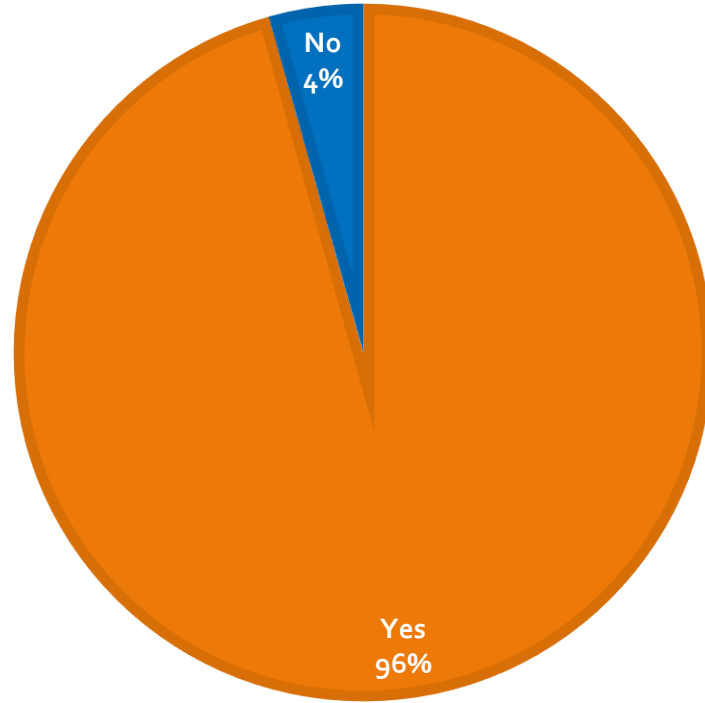
# Domestic Orders

COVID-19 Outbreak Impact Analysis, Turkish Metalcasting Industry

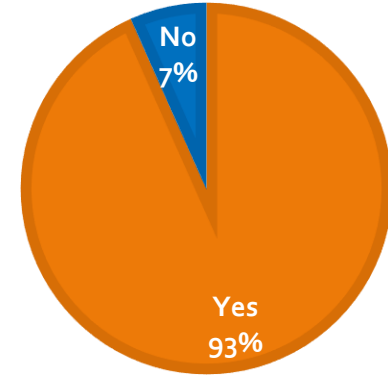
Foundry Suppliers



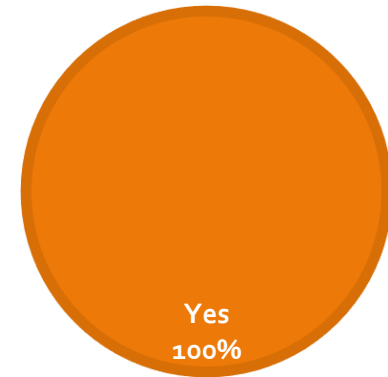
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# Domestic Orders

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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## Decline in orders from the metalcasting industry

33%



Toplam  
Total

34%



Üretici  
Manufacturers

26%



Müessil  
Representatives

\*Based on turnover

\*Ciro bazında

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# Domestic Orders

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Analysis, Turkish Metalcasting  
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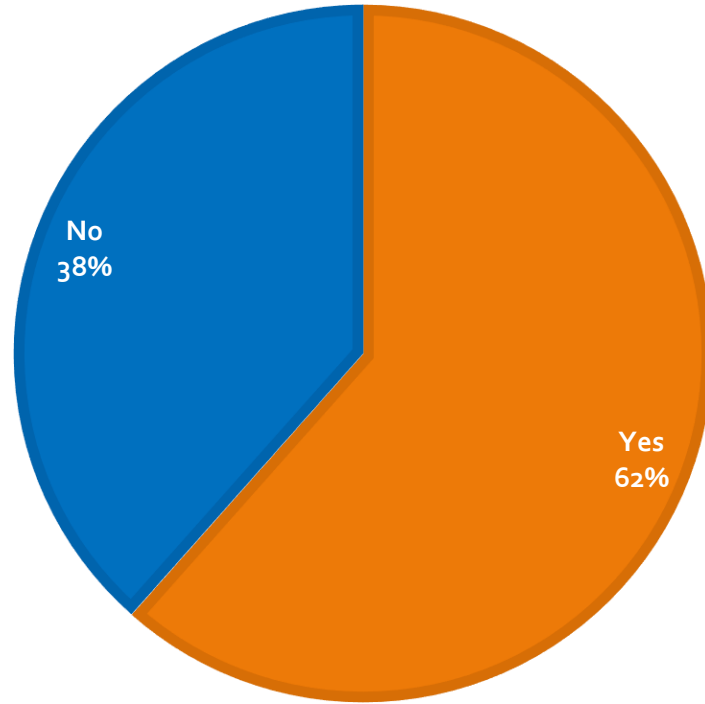
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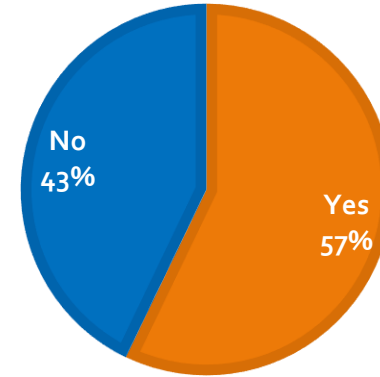
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Have you encountered any cancellation/postponement of orders from the other sectors?

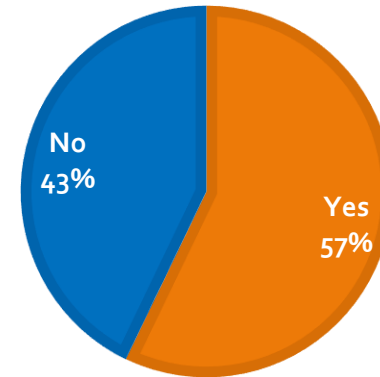
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# Domestic Orders

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Analysis, Turkish Metalcasting  
Industry

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If yes, from which sectors?

## Manufacturers

- Refractories
- Lining
- Construction chemicals
- Sports
- GRP pipes
- Iron-steel
- Tractor

## Representatives

- Iron-steel
- Granite
- Mechanics
- NDT
- Non ferrous

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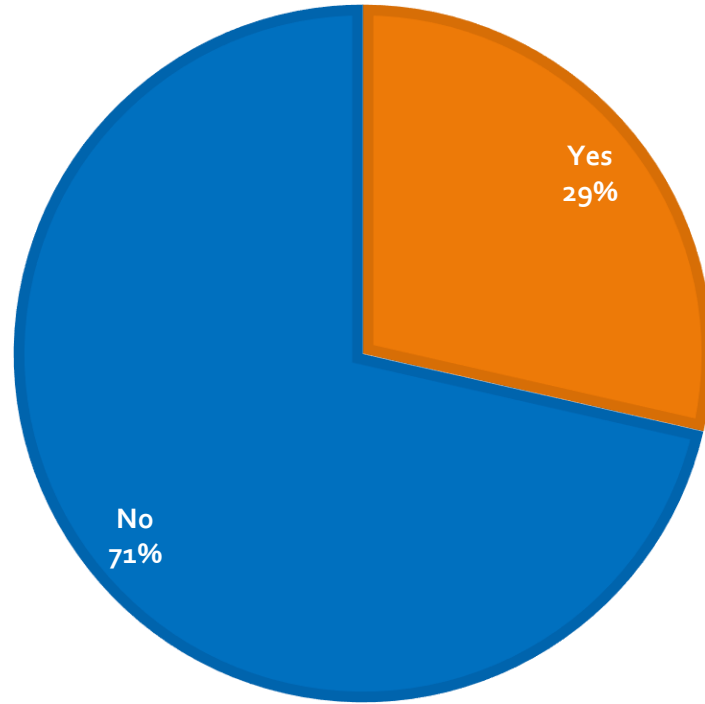
Have you encountered any cancellation/postponement of orders from foreign buyer sectors?

# Export Orders

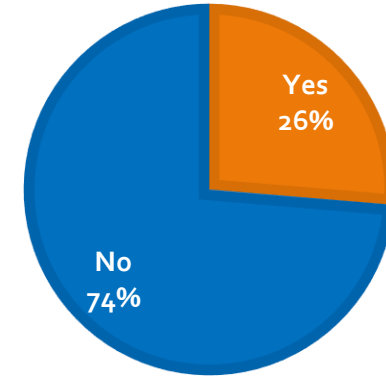
COVID-19 Outbreak Impact  
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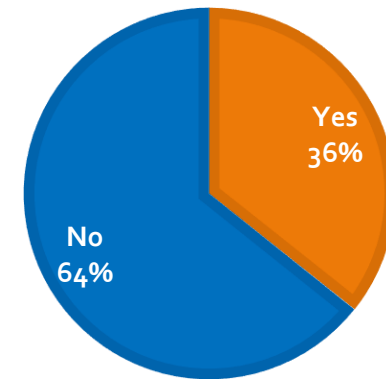
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# Export Orders

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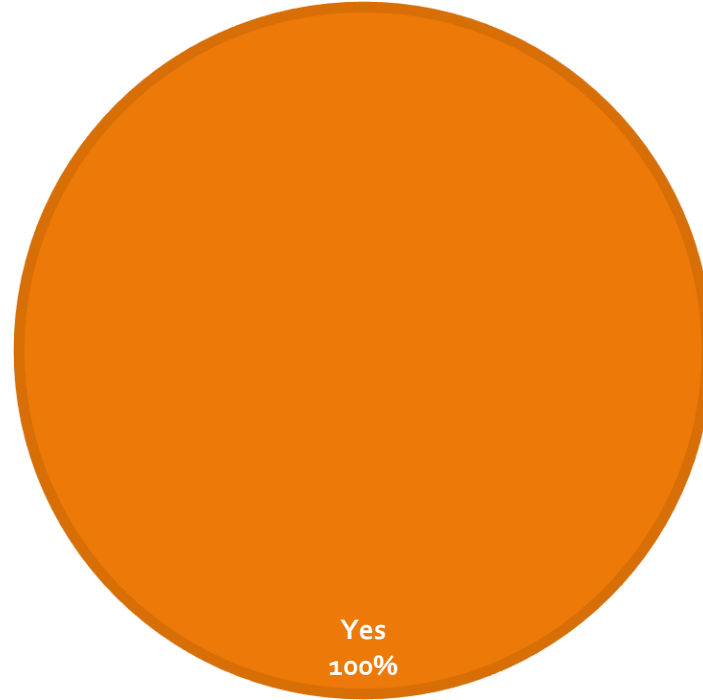
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Have you encountered any  
cancellation/postponement of orders from  
metalcasting industry?

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If yes, from which countries?

## Manufacturers

- Middle-East
- Russia (postponements)
- Czech Republic (postponements)
- Poland (postponements)
- Israel
- Egypt
- Morocco

## Representatives

- Europe
- Italy
- Austria
- Russia(postponements)
- Czech Republic (postponements)
- Poland (postponements)
- North Africa
- Middle-East

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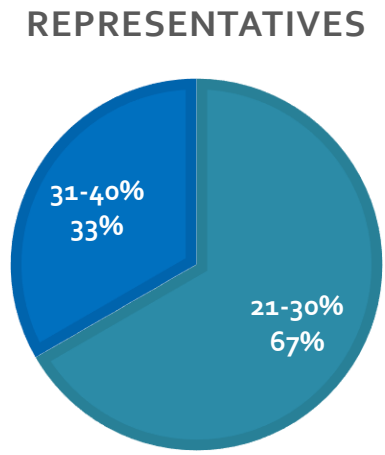
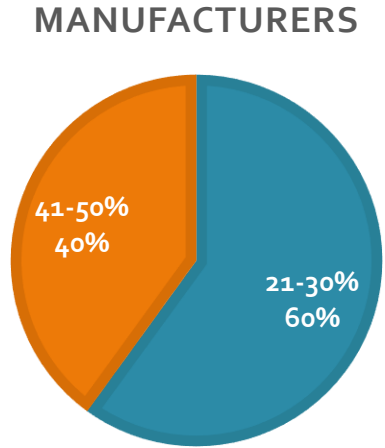
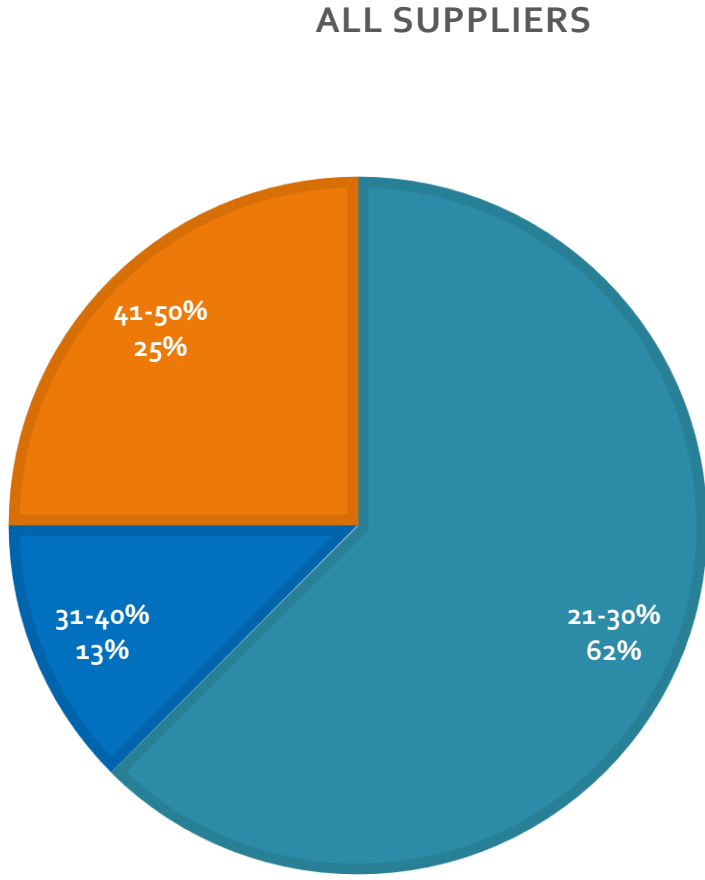




# Sales Decline Due to the Outbreak

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# Product Shipments

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
Industry

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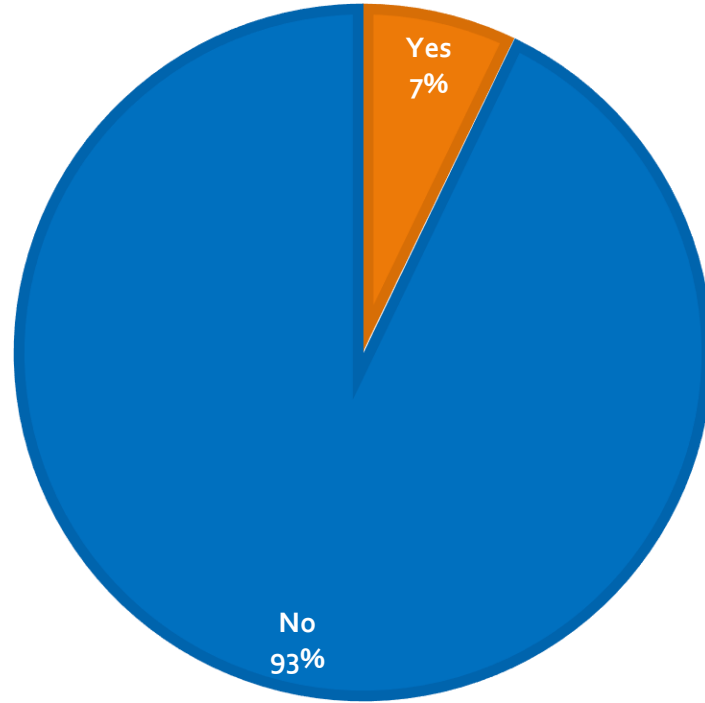
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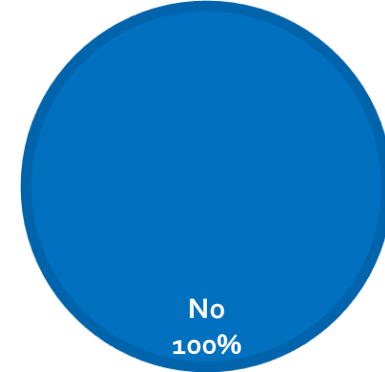
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Have you encountered product shipment problems?

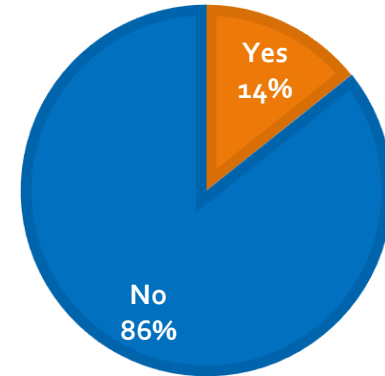
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# Sickness absence of staff

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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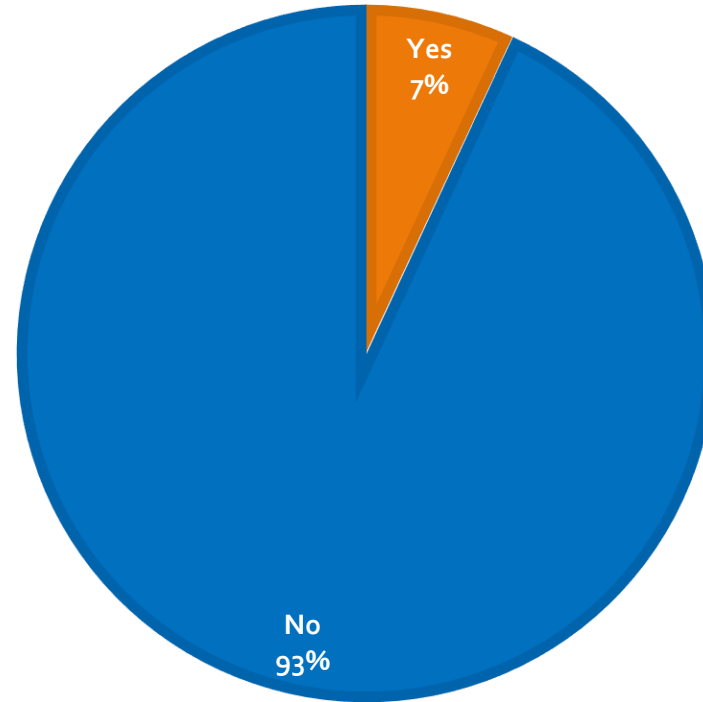
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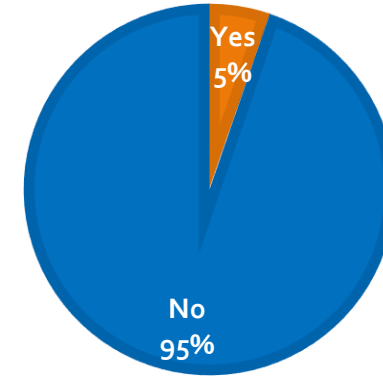
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Have you had production loss due to the sickness absence of staff?

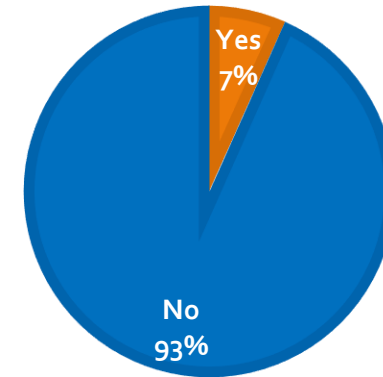
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# Production Cut-Off

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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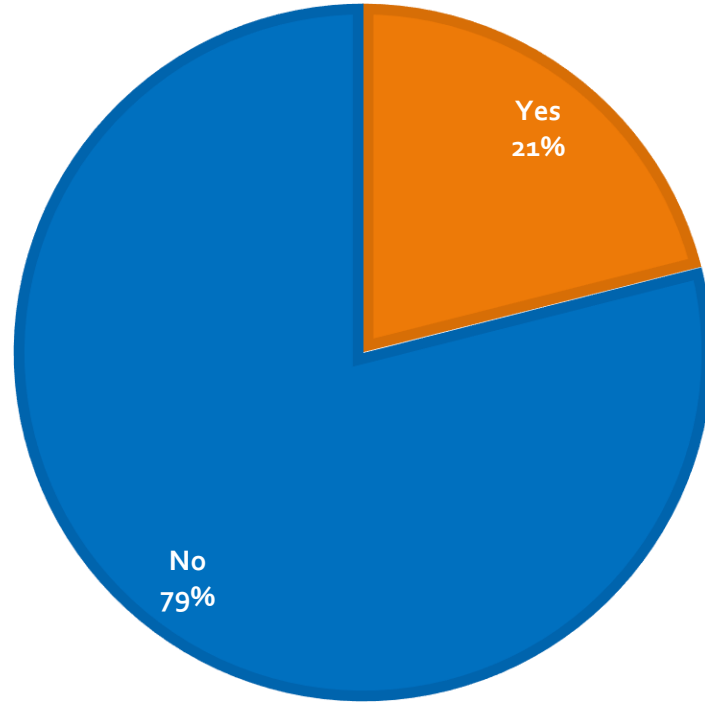
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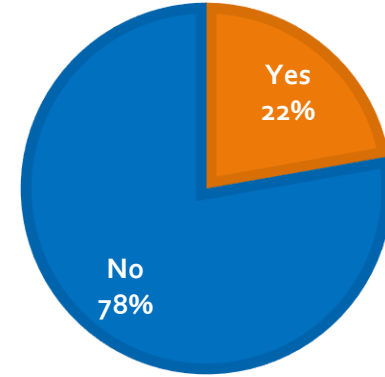
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Have you stopped your production during the outbreak?

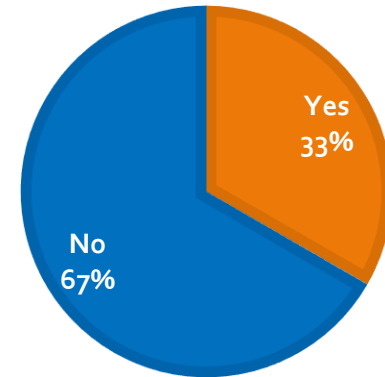
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# Production Cut-Off

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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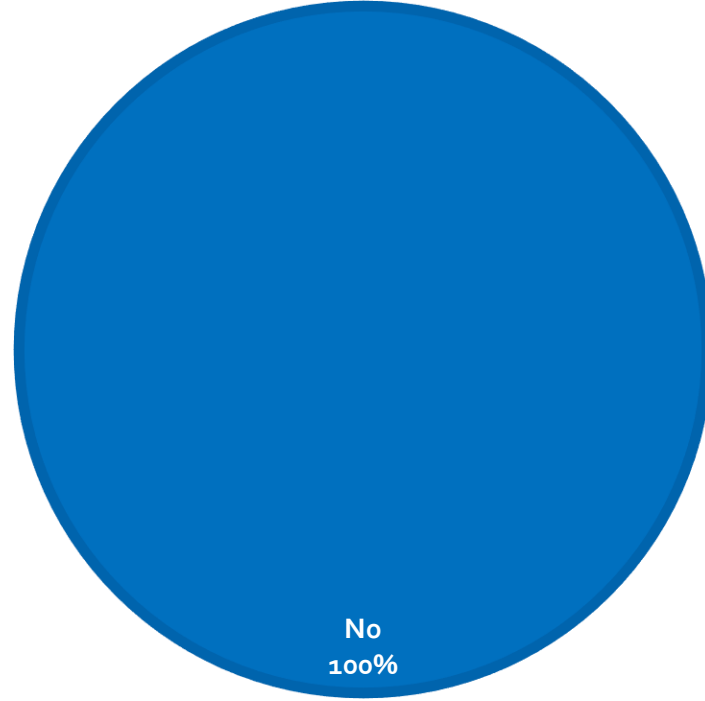
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Are you planning to stop production in the near future?

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# Curfew Exceptions

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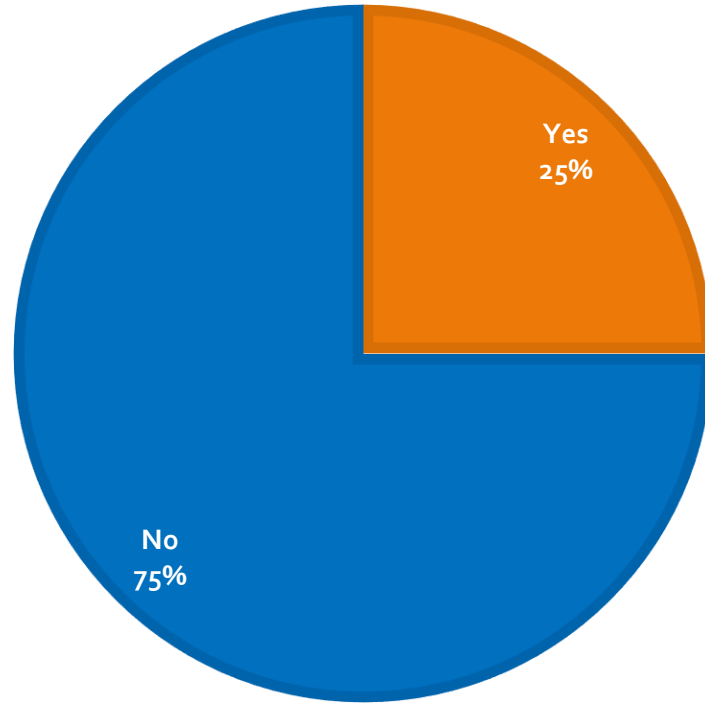
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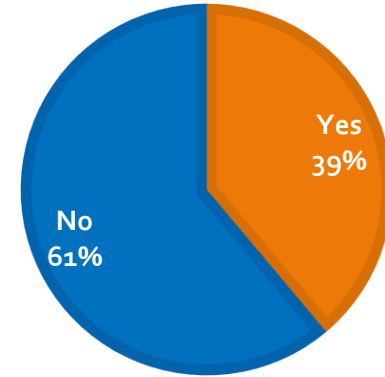
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Have your facility utilized the curfew period exceptions to continue its operations?

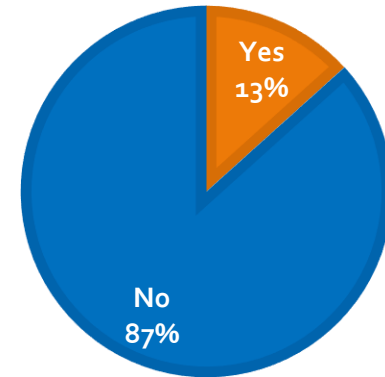
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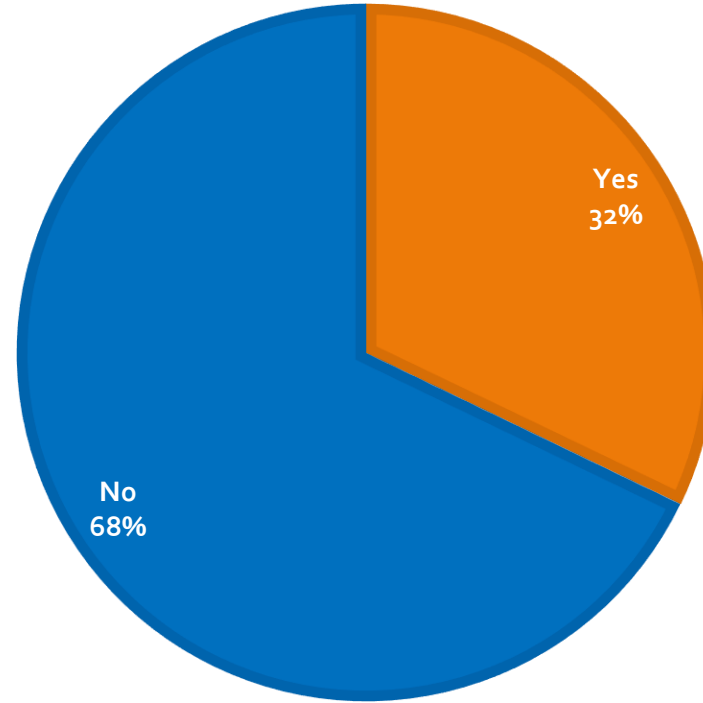
# Short-time Work Allowance

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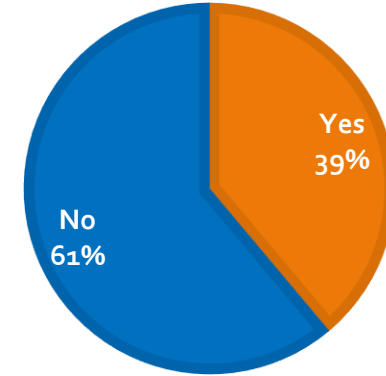
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## Have you applied for the short-time work allowance?

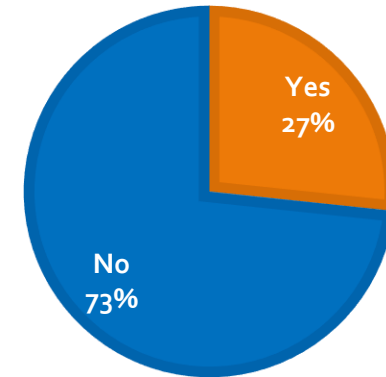
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# Short-time Work Allowance

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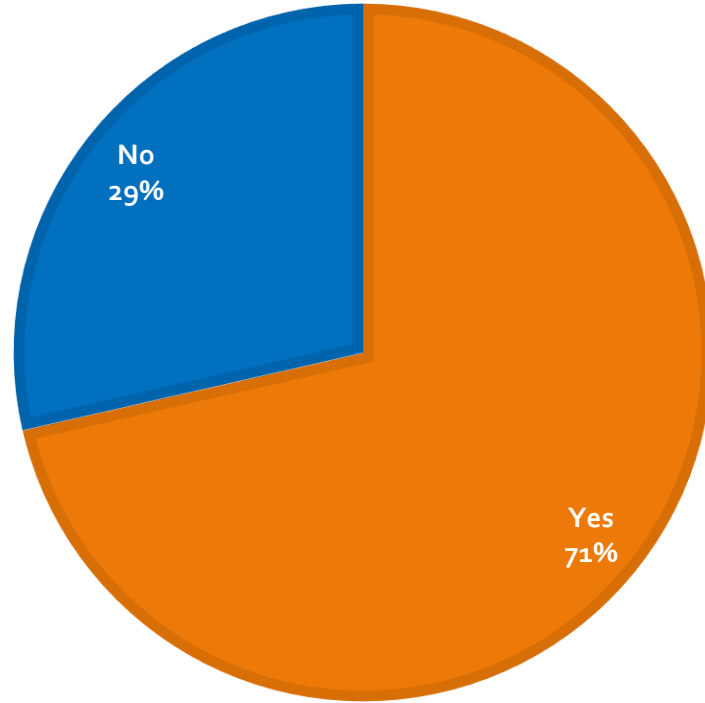
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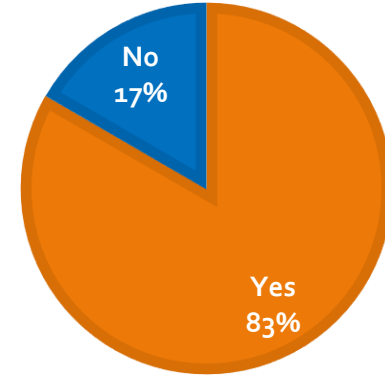
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If yes, have you implemented the short-time working system?

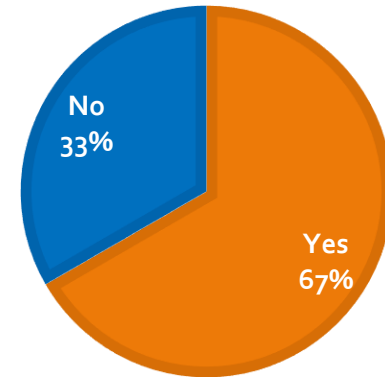
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## Short-time Work Allowance

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If yes, since when?

The majority of the applicants received approvals for short-term working fund.

Most of the companies have started short working in April. Some of them have started in May.

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# Unpaid leave

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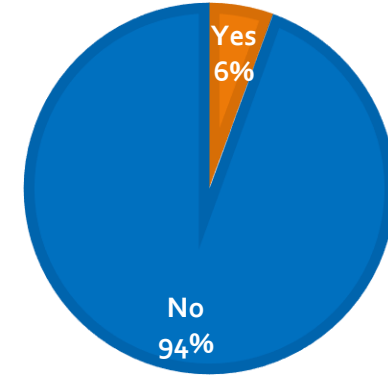
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## Have your company announced unpaid leave for employees?

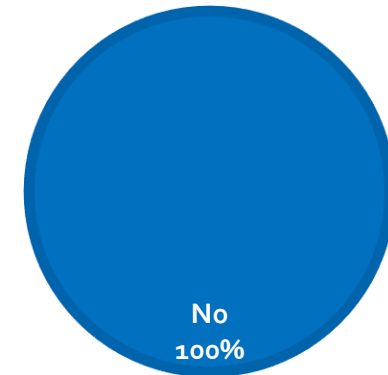
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# Impact of the Outbreak on Metalcasting Business

COVID-19 Outbreak Impact  
Analysis, Turkish Metalcasting  
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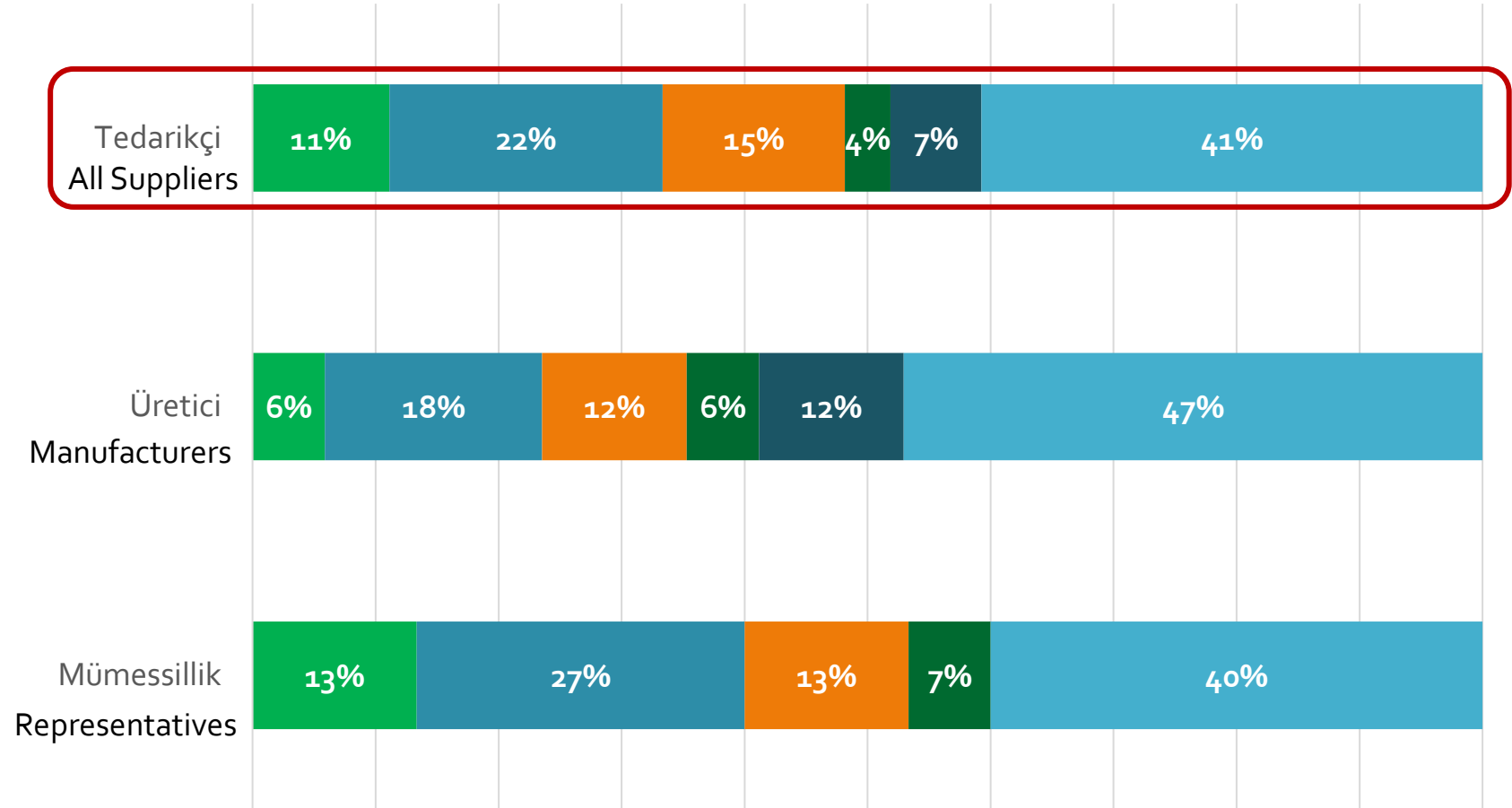
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When do you think the impact of the outbreak on business volume will end?

June Haziran July Temmuz August Ağustos Sept Eylül Oct Ekim Nov Kasım Dec Aralık 2021 Jan - 2021 Ocak sonrası



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# CAEF Survey Results

COVID-19 Outbreak Impact  
Analysis, European Metalcasting  
Industries

Only available to TUDOKSAD members on our website at:  
[tudoksad.org.tr/dosyalar](http://tudoksad.org.tr/dosyalar)

**Survey Period: 1-8 May**

**Participant CAEF Member**

**Countries:** Germany, Italy,  
France, Spain, UK, Austria,  
Sweden, Hungary, Portugal,  
Finland, Netherlands

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+90-212-2671398

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Heraeus  
Electro-Nite





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# Covid-19 Outbreak Impact Analysis

Metalcasting Industries in Turkey & Europe

*End of April – Beginning of May*



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