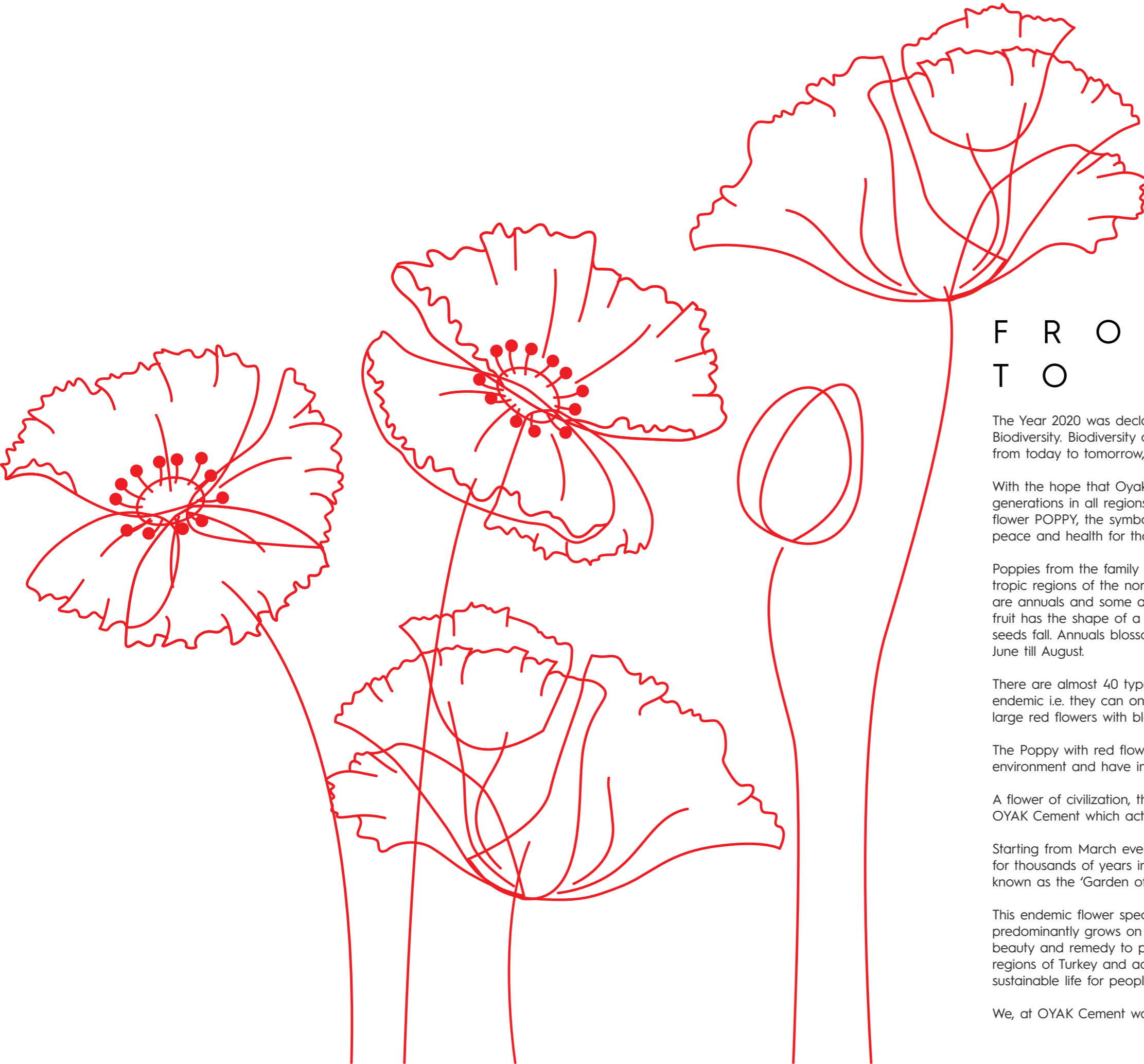




**CEMENT**



# 2020 Integrated Report



## F R O M   T O D A Y T O   T O M O R R O W

The Year 2020 was declared by the United Nations (UN) as the Year for Nature and Biodiversity. Biodiversity and sustainability, two most important constituents of our journey from today to tomorrow, have been and will be integrated into all our works and activities.

With the hope that Oyak Cement acts as a bridge with sustainable structures to raise healthy generations in all regions of Turkey, we want to include in our 2020 Integrated Report the flower POPPY, the symbol of elegance, which has our corporate colors and has brought peace and health for thousands of years, a true survivalist and embellishment of civilizations.

Poppies from the family of Papaveraceae in Latin are mostly seen in temperate and sub-tropic regions of the northern hemisphere. Some of the species of the family Papaveraceae are annuals and some are perennials and their flowers have red, pink or orange color. Their fruit has the shape of a capsule. When the capsule matures, the holes at the top open and seeds fall. Annuals blossom in May and June whereas perennials have flowers starting from June till August.

There are almost 40 types of poppy species indigenous to Turkey. Some of them are endemic i.e. they can only be found in Turkey. The most common Poppy species in Turkey has large red flowers with black spots at the base of their petals.

The Poppy with red flowers and black spots were frequently mentioned in Roman cultural environment and have intriguing meanings in Ottoman Divan Literature.

A flower of civilization, the poppy also represents the building of a sustainable future just like OYAK Cement which acts as a bridge between civilizations in its industry.

Starting from March every year, poppies, as Spring flowers, have accompanied civilizations for thousands of years in every region of our country from most notably Southeast Anatolia, known as the 'Garden of Eden' to Aegean and Mediterranean regions.

This endemic flower species which has the same color as OYAK Cement corporate color predominantly grows on vast uncultivated fields adapting to the environment and brings beauty and remedy to people. OYAK Cement is represented in all of the geographical regions of Turkey and adopts to different environments contributing to a higher quality and sustainable life for people.

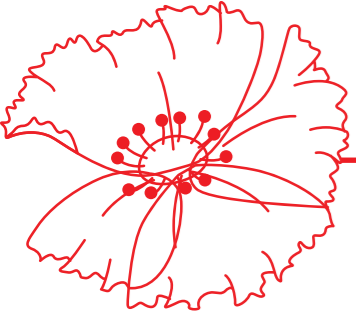
We, at OYAK Cement work to act as a bridge leading to a happier and healthier future.



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Trade Name : OYAK Çimento Fabrikaları A.Ş.  
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Central Registration System No : 0612005096100011  
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Tel : +90 312 220 02 90 Fax: +90 312 220 02 91  
Website Address : www.oyakcimento.com



## About The Report

OYAK CEMENT FACTORIES INC. (OYAK CEMENT) Integrated Report (IR) is published within the period of 14 May 2020 - 31 December 2020, covering all locations and activities. Our integrated reporting frequency is one year from now on. OYAK Cement's merged structure is reflected as a separate company with structural changes, five cement factories united under one roof and continuing their activities under the new merged structure.

Our next IR of 2021 will be published in 2022. Our IR is prepared based on the International Integrated Reporting Council (The International Integrated Reporting Council (IIRC) and Global Reporting Initiative (GRI) frameworks.

The Integrated Report was published on 28 May 2021.

All information included in this report had been provided by OYAK Cement, and the report had not been verified independently. The subjects covered by the report are based on reliable and verifiable information. The content of the report cannot be copied, amended or distributed without explicit written approval of OYAK Cement. All rights of OYAK Cement are reserved. The report can be reached at **[www.oyakcimento.com](http://www.oyakcimento.com)** and our e-mail address for your questions and suggestions: **[iletisim@oyakcimento.com](mailto:iletisim@oyakcimento.com)**



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# Corporate Overview



## Top Management Statements



# Chairman's Message



We have spent a year under the shadow of a global pandemic. The year 2021 where transformation is gaining speed, is also taking us to a world where value-based cooperation will increase. During these times when Covid-19 pandemic has a big impact on the entire world, I would like to express the importance of our commitment to our corporate culture and values while fighting against the pandemic. Our companies Adana Cement, Aslan Cement, Bolu Cement, Mardin Cement and Ünye Cement which are all separate legal entities as the constituents of the development of our industry merged under the name OYAK ÇİMENTO FABRİKALARI A.Ş. on May 14, 2020 in line with the strategic plans and goals in the cement industry.

We believe that the decision to merge will bring synergy to our company and see it as an important step to continue our operations within a business model that balances environmental, social and economic effect of our innovation-based growth goal. We shall have to follow the global developments as well as the ambitious climate-related goals of the European Union(EU) as listed

in the Green Deal, and reflect this transformation in our strategies. In this regard, acknowledging that we are at the beginning of a strategic transition by prioritizing our environmental, social and economic effect, we present you our 2020 Integrated Report at the service of our stakeholders.

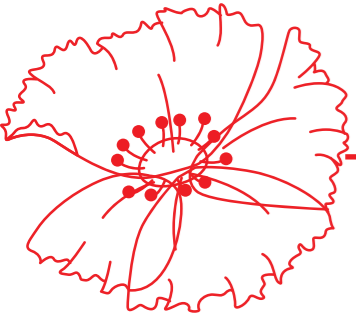
With this merge which we believe will create a synergy in our group and industry, OYAK Cement will continue to be a pioneer in the industry and to be the proud owner of the vision of "Turkey's biggest cement brand". OYAK Cement will continue its operations based on value creation by closely following all global and local developments.

I, representing the leadership of the company, would like underline that we have maintained our perspective which prioritizes people and the environment also in 2020.

Kind regards,

**Suat ÇALBIYIK**  
CEO of Oyak Cement  
Concrete Paper Group

## Top Management Statements



## General Manager Message



Oyak Cement will contribute to Turkey's economic and social development as part of its culture of building bridges between the past and the future.

In 2020, with the merging of our five companies which have been operating under the same corporate umbrella, we coalesced as Oyak Cement to increase our competitiveness on a global scale. Our integrated reports which we have prepared separately as Oyak Aslan Cement and OYAK Adana Cement before this merging will be delivered under the name of OYAK Cement starting from this report year. In this transition process, at the heart of value of the system approach, we reflect the business model in which our performance indicators are complemented by environmental, social and economic requirements on our process.

Value based business model with supported 6 capitals is integrated into our processes and managed accordingly.

We revised our materiality assessment in the scope of sustainability and made essential changes into our strategies on the way of sustainable management implementation.

We are closely following the work of the European Union on new economic, environmental and energy transformation as well as other

developments on climate and energy in the world.

Transformation in global trades as a result of climate concerns is leading us to a model of circular economy. In 2020, we focused on energy efficiency projects at OYAK Cement, increasing the percentages of the use of alternative fuels to increase our efficiency as well as to fight with climate change.

We acknowledge the potential effects of the Glasgow Climate Talks in 2021 on the industries, and we are moving forward to achieve our goals.

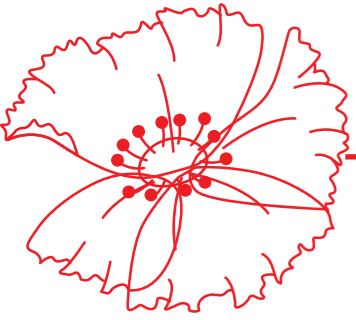
We are going to promote our supply chain sustainability indicators in the near future under the IR practices and continue to comply with all requirements.

OYAK Cement with located production sites in all regions in Turkey, supports economic and social developments, will continue to pass its mission to the next generations. Based on this aim, we prepared our IR and shared it with all our stakeholders.

Best Regards,

**Ali PASTONOĞLU**  
OYAK Cement  
General Manager

## Top Management Statements



# Director of Alternative Resources and Environment



Besides environmental sustainability we are in a vision of transformation that not only increasing our performance but also our social and economic impacts.

After merging in 2020, we will continue our sustainability journey with the support of our corporate culture more strongly. In this context, OYAK Cement will continue to lead IR with a communication of all stakeholders.

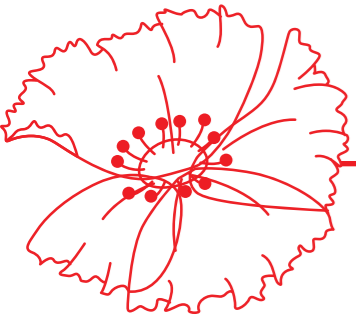
We focused on a low carbon economy in the shadows of climate change, reduction of raw materials based on innovative solutions in short, medium and long term targets in IR, 2020.

The year 2020 was a year of productivity and creativity with supporting economic, environmental and social indicators and reviewing circular economy transitions and processes. At the same time, unfortunately, 2020 was a year of fighting Covid 19 pandemics in all our sources. We also summarize all our

efforts against Covid 19 pandemic in the IR of 2020. With Power of merging organizational structure we are in a period of strong sustainability. We will continue to improve our product and production lines in a way of low carbon economy and innovative production technologies.

Best Regards,

**Galip TEKİNER**  
Director of Alternative Resources  
and Environment



## Corporate Profile

6 Integrated cement factories, 3 grinding plant, 51 ready mixed concrete plant, 3 aggregate crushing plants, production of 12 million ton clinker, 22 million ton cement grinding, 3 million ton slag grinding, 9 million m<sup>3</sup> ready mixed concrete production.

OYAK Cement  
Factories Inc.  
Adana Cement  
Branch

1954 ›

OYAK Cement  
Factories Inc.  
Ünye Cement  
Branch

1969 ›

OYAK Cement  
Factories Inc.  
Arkara Cement  
Branch

1998 ›

1910 ›

OYAK Cement  
Factories Inc.  
Aslan Cement  
Branch

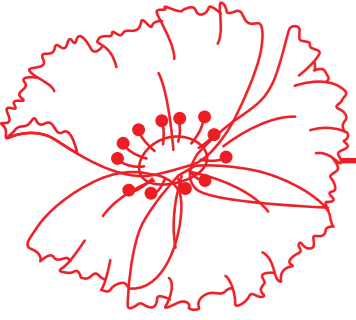
1968 ›

OYAK Cement  
Factories Inc.  
Bolu Cement  
Branch

1969 ›

OYAK Cement  
Factories Inc.  
Mardin Cement  
Branch

OYAK Cement is currently Turkey's largest cement producer and market leader. It is the first Turkish manufacturer to grow in the global market.



## Corporate Profile

### History of Branches

#### OYAK Çimento Fabrikaları A.Ş. Adana Cement Branch

Adana Cement was established under the name Çukurova Çimento Sanayii T.A.Ş. in 1954 with the collaborative work of Türkiye Emlak Bankası, Akbank and Türkiye İş Bankası. Production started in the factory in 1957 and in 1998 the factory started to produce white cement and sulphate resisting cement (SRC).

In 2006 a cement terminal with an annual capacity of 200,000 tons started to operate in the Free Port Zone in Gazimagosa in the Turkish Republic of Northern Cyprus (KKTC). In 2007 Iskenderun Grinding and Packaging Plant with an annual capacity of 1 M tons slag and slag cement was bought by the company.

With the grinding plant with an annual capacity of 1 M tons built within the facilities of Iskenderun Demir ve Çelik A.Ş. in 2009, the company's slag and slag cement grinding capacity was increased to a total of 2 M tons/year. Annual total grinding capacity in Adana Central and Iskenderun 1 and 2 plants reached to 5.5 M tons.

With the investment of Adana Cement in its clinker production line no 5, its clinker production capacity was increased in white and grey cement,

- White clinker production capacity, 1.1 M ton/year,
- Gray clinker production capacity, 3.3 M ton/year,

#### OYAK Çimento Fabrikaları A.Ş. Bolu Cement Branch

Bolu Cement was founded in 1968 under the name Bol-Bak Gıda ve Sanayii Ticaret A.Ş. and 25% of its shares were transferred to Türkiye Çimento Sanayii ve Ordu Yardımlaşma Kurumu (OYAK) and 16% were transferred to Turkish Cement Industry (ÇİSAN). In 1990 OYAK's shares in Bolu Cement increased over 50%.

The construction of Bolu Cement Plant started in 1969 and after trial productions were completed, the plant started to operate in 1974. Investments have continued in the plant until today. Bolu Cement Plant also designs and produces cement for special projects.

#### OYAK Çimento Fabrikaları A.Ş. Ankara Cement Branch

Ankara Packaging Plant was established in 1996 as part of Bolu Çimento San. A.Ş. and became Ankara Grinding and Packaging Plant in 1998. The construction of Ankara Branch Integrated Cement Plant that has started in 2014 ended in 2015 and with this investment, Ankara Branch of OYAK Çimento Fabrikaları A.Ş. achieved an annual production capacity of 1,300,000 tons of clinker and 1,950,000 tons of cement and slag.

#### OYAK Çimento Fabrikaları A.Ş. Aslan Cement Branch

The first cement factory in Turkey built in 1910, Aslan Cement, put their first wet process kiln into use in 1953. Being the first plant to switch to the dry system in 1969, Aslan Cement reached to an annual capacity of 1 M with a single kiln in 1978. Aslan Cement was privatized in 1989 and operated by Lafarge Cement company for 20 years and then bought by OYAK Group in 2010. The plant exceeds the average in the industry in use of alternative fuels and therefore is one of the plants with the lowest carbon footprint.

#### OYAK Çimento Fabrikaları A.Ş. Mardin Cement Branch

Mardin Cement was established in 1969 in Mardin to lead the way in development and reconstruction in Southeast Anatolia Region and meet cement demands of neighbor countries in the Middle East.

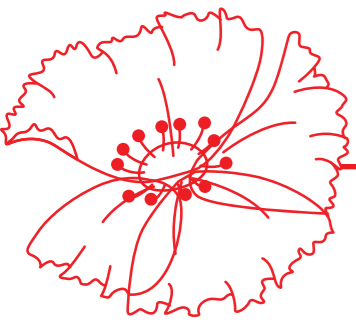
OYAK had 40% share, Türkiye Çimento Sanayii T.A.Ş. had 40% share and local organizations and individuals had 20% share in the founding capital of the plant. OYAK increased its share in Mardin Cement to 50% in 1990. Mardin Cement became an OYAK Cement affiliate in 2015. Mardin Cement continued to grow with investments parallel to the development of Turkey and the region. Taking into consideration the changing market conditions, Mardin Cement has one of the best clinker use ratio based on the distribution of cement types produced in the plant, and therefore stands out among others by lowering its carbon footprint in the final product and contributing to sustainability.

#### OYAK Çimento Fabrikaları A.Ş. Ünye Cement Branch

Ünye Çimento Sanayii ve Ticaret A.Ş. was founded in Ünye, Turkey in 1969 to produce clinker and cement. Ünye Cement in which Türkiye Çimento Sanayii T.A.Ş. and OYAK have 40% share started cement production in 1974.

Ünye Cement's initial capacity was 600,000 tons/year cement and today the plant has 1.5 million tons/year clinker and 2.6 million tons/year cement production capacity thanks to its priority efforts in capacity increase, improvement and modernization.





# Corporate Profile

## Organizational Structure at OYAK Cement

**Ali PASTONOĞLU**

OYAK ÇİMENTO FABRİKALARI A.Ş.  
GENERAL MANAGER



**Vedat ULUĞTEKİN**

INDUSTRIAL  
ACTIVITIES VICE  
PRESIDENT



**Cem ÇELİK**

SALE and MARKETING  
VICE PRESIDENT



**Kaan KAHVECİ**

FINANCIAL AFFAIRS  
VICE PRESIDENT



**Ozan ERİNÇKAN**

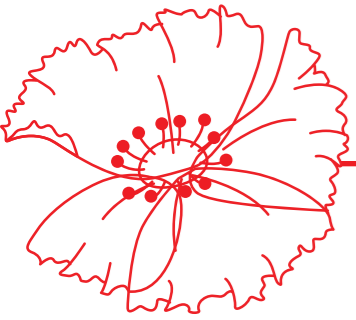
SUPPLY CHAIN  
VICE PRESIDENT



**Levent ÖZÇENGEL**

HUMAN RESOURCES  
VICE PRESIDENT





## Corporate Profile

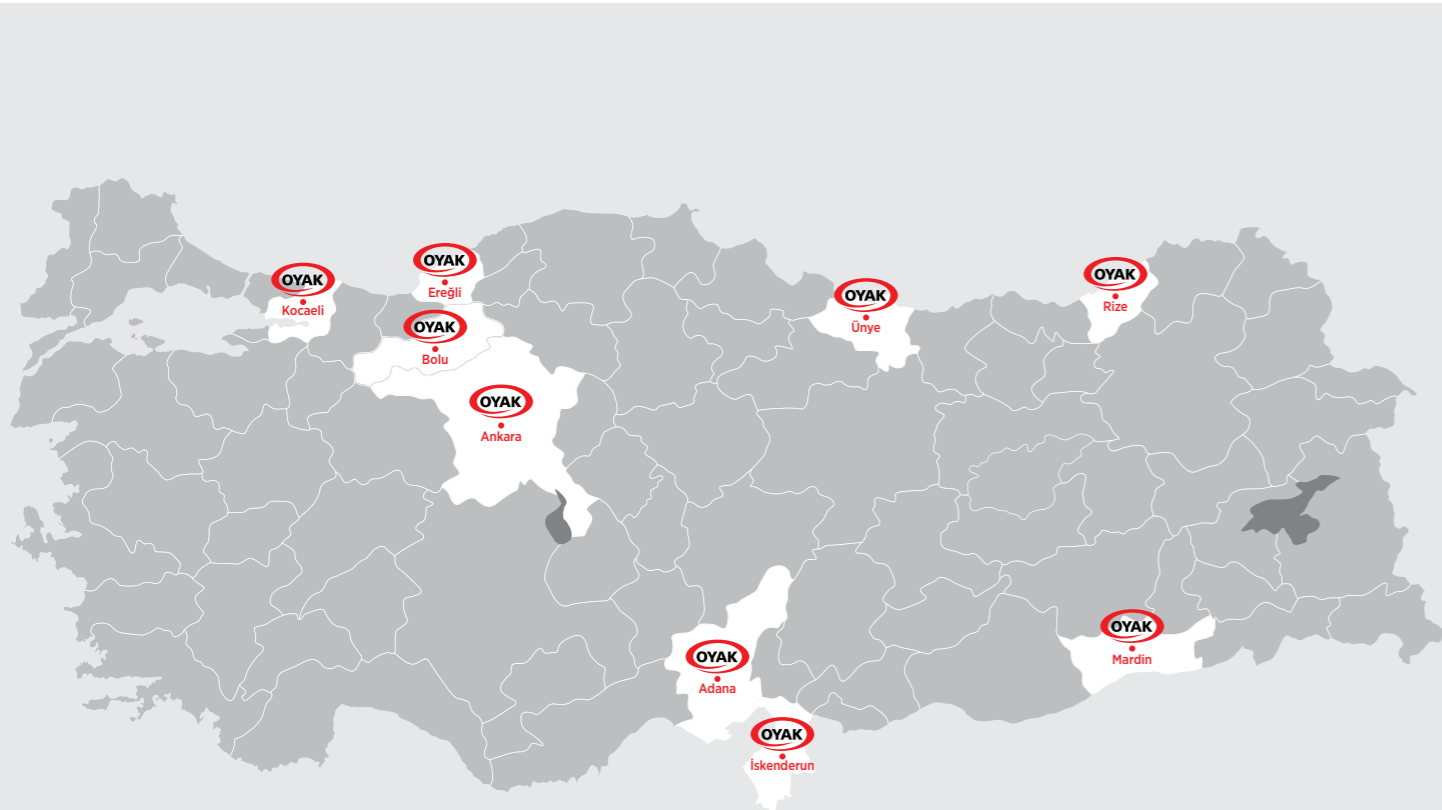
OYAK Cement Factories Inc. (OYAK Cement), on 13.12.2019 strategic plans and Adana Çimento Sanayii T.A.Ş. aims to create synergy in line with the targets in the cement sector. Aslan Çimento A.Ş., Bolu Çimento Sanayi A.Ş. and Ünye Cement Industry and Trade Inc. merged with Mardin Cement Industry and Trade. Inc. as on 14.05.2020 Registered in Mardin Trade Registry Office.

Operating in five geographical regions of Turkey with each of its factories, OYAK Cement's flagship and the first cement factory in our country is also owned by OYAK Cement. OYAK Cement is the capacity and market leader of the Turkish cement industry.

As Aslan Cement and Adana Cement, in 2016, 2018 and 2019, Integrated reports have been published. Now as OYAK Cement, we prepared our first integrated report after merging group companies.

OYAK Cement shares, Borsa İstanbul A.Ş. (BIST) is traded with the OYAKC code.

OYAK Cement's product types depending on its locations are shown in Table 1, Distribution of branches is given in Table 2.



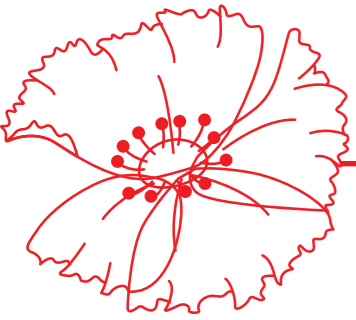
**Table 1**  
**Branches and Production Distribution**

Location	Subject of Activity
Aslan Cement Branch	Grey Cement and Clinker Production
Bolu Cement Branch	Grey Cement and Clinker Production, Blast Furnace Slag Production
• Ereğli Plant	Grey Cement and Blast Furnace Slag Production
Ankara Cement Brach	Grey Cement and Clinker Production
Adana Cement Branch	Grey Cement and Clinker Production, White Cement and Clinker Production
• İskenderun 1 Plant	Grey Cement and Clinker Production, Blast Furnace Slag Production
• İskenderun 2 Plant	Grey and White Cement Production, Blast Furnace Slag Production
Ünye Cement Branch	Grey Cement and Clinker Production
Mardin Cement Branch	Grey Cement and Clinker Production,

**Table 2**  
**Branches and Capacity Distribution**

Branches	Foundation Year	Grey Clinker Capacity (ton/year)	White Clinker Capacity (ton/year)	Grey Cement and Slag Capacity (ton/year)	White Cement Capacity (ton/year)
Aslan Cement Branch	1910	1.250.850	-	2.000.000	-
Bolu Cement Branch	1974	1.450.000	-	2.500.000	-
• Ereğli Plant	2011	-	-	792.000	-
Ankara Cement Brach	1996	1.300.00	-	1.950.000	-
Adana Cement Branch	1954	3.329.800	1.098.900	2.750.000	750.000
• İskenderun 1 Plant	1977	-	-	1.000.000	-
• İskenderun 2 Plant	2009	-	-	1.000.000	-
Ünye Cement Branch	1969	1.560.000	-	2.600.000	-
Mardin Cement Branch	1969	2.000.000	-	3.340.000	-

The values in the table are taken from the Capacity Reports.



# Corporate Profile

Shareholder structure of OYAK Cement for 2020



Names of Partnership and Subsidiaries	Activity
Adana Çimento Sanayi ve Ticaret Ltd.	Cement and clinker production and sales
OYAK Beton Sanayi ve Ticaret A.Ş.*	Ready mixed concrete production and sales
Marmara Madencilik San. ve Ticaret Ltd. Şti.	All kinds of mineral exploration, extraction, discovery, processing and operation of these and their raw, semi-finished products, manufacture, purchase and sale

\* A 100% subsidiary of our company, all assets and liabilities of OYAK Beton Sanayi ve Ticaret A.Ş. Registration procedures regarding the merger within our Company by means of "taking over" by applying the "Merger in the Facilitated Procedure" method as a whole, Ankara Trade Registry Office was completed as of 31/12/2020.

Our shareholder structure is given in Table 3.

**Table 3**  
**Shareholder Structure**

Name of Foreign Affiliates	Activities
Adana Çimento Free Port Ltd.	Cement and Clinker
Ünye Cem SRL	Cement and Packaging

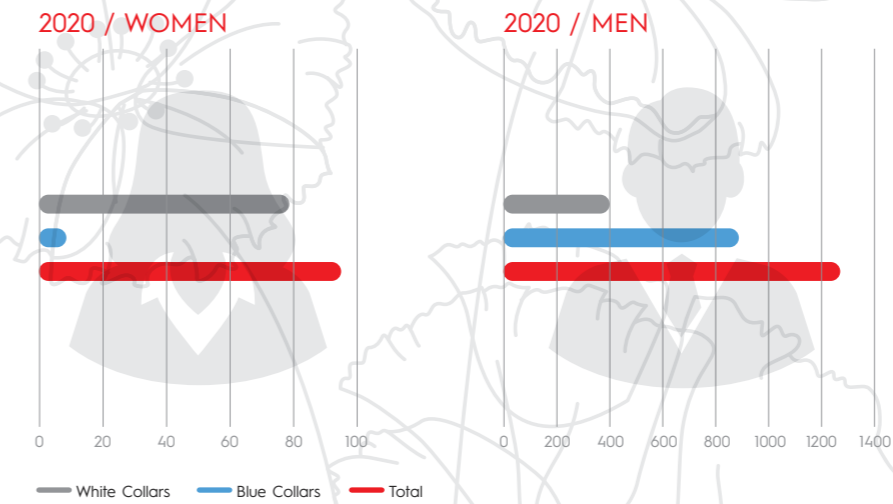
Our corporate memberships are given in Table 4.

**Table 4**  
**Our Corporate Memberships**

Name	Abbreviation
Turkish Cement Manufacturers' Association	TÜRKÇİMENTO
Cement Industry Employers's Association	ÇEİS
Cement Workers Union	ÇİMSE-İŞ
Integrated Reporting Turkey Network	ERTA
Ankara Chamber of Commerce	ATO
Turkish Ready Mixed Concrete Association	THBB
Waste and Environment Management Association	TAYÇED
World Cement Association	WCA
Global Cement and Concrete Association	GCCA

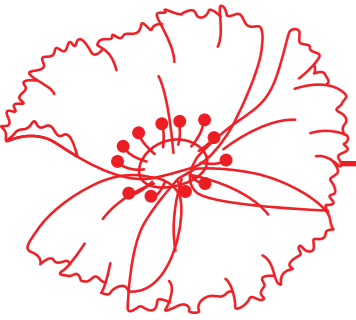
The distribution of our employees as male-female and blue-white collar is given in Chart 1.

**Chart 1**  
**Number of Employees**



Employees	Women	Men
White Collars	89	398
Blue Collars	6	841
<b>Total</b>	<b>95</b>	<b>1,239</b>

2020



# Corporate Profile

## Financial Profile

Capacity utilization in cement production is 56% and clinker is 65% in 2020. The impact of the economic contraction in 2019 and Covid 19 epidemic also has been added in 2020. The distribution of production given in Table 5.

Total Sales Revenue (TL) / 2020
2.930.599.794

**Table 5**  
**Distribution of Production in 2020**

Product Name	Capacity (ton/year)	2020	
		Production (ton/year)	The Capacity Utilization Rate (%)
Clinker (Grey and White)	11.989.550	7.536.107	63
Cement and Slag	18.682.000	10.438.495	56

Cement and clinker production distribution is given in Table 6.

**Table 6**  
**Clinker and Cement Production Distribution in 2020**

Year	CLINKER (ton)						
	Aslan	Mardin	Ünye	Adana-Beyaz	Adana-Gri	Bolu	Ankara
2017	1.209.450	1.121.251	1.339.566	384.907	1.550.455	1.064.823	1.286.800
2018	1.209.020	967.070	1.418.066	515.290	1.641.500	1.198.083	1.159.958
2019	1.123.458	692.609	1.067.164	520.000	1.260.000	743.253	760.530
2020	962.927	980.191	1.324.521	542.330	1.354.604	1.346.654	1.024.881

Year	CEMENT (ton)						
	Aslan	Mardin	Ünye	Adana-Beyaz	Adana-Gri	Bolu	Ankara
2017	1.971.725	1.586.840	1.642.242	456.834	2.157.474	1.767.948	1.281.000
2018	1.683.517	1.225.815	1.613.077	567.410	1.964.801	1.559.603	1.188.071
2019	1.386.900	969.874	1.358.104	553.586	1.264.912	973.391	871.723
2020	1.839.902	1.189.399	1.489.531	637.707	1.652.986	1.425.525	1.137.622

Financial capital indicators shown in Table 7 and distribution of sold products are given in Table 8.

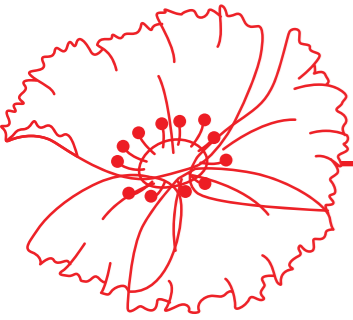
**Table 7**  
**Financial Indicators**

Indicators	2020	2021 (Target)
Net Sales Value (TL)	2.930.599.794	3.522.694.875
Net Profit (TL)	356.957.598	254.731.891
Total Current Assets (TL)	1.906.836.013	1.836.102.077
Total Assets (TL)	5.651.841.906	5.580.114.526
Total Equity (TL)	3.825.037.201	3.937.040.791

**Table 8**  
**Distribution of Sold Products**

Products	2020 Sales Rate (%)
Grey Cement	74,8
White Cement	5,2
Grey Clinker	2,3
White Clinker	0,2
Grinding Slag	7,9
Granule Slag	9,6





# Corporate Profile

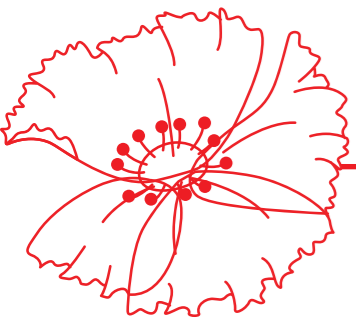
The distribution of product types and classes by branches is given in Table 9.

**Table 9**  
**Distribution of Product Types and Classes**

Product Name	Type and Classification	Standard
<b>Adana Cement Branch</b>		
Portland Cement	CEM I 42,5 R	TS EN 197-1
Portland Cement	CEM I 52,5 R	TS EN 197-1
White Portland Cement	CEM I 52,5 R / BPÇ 52,5 R/85	TS EN 197-1 TS 21
White Portland Lime Cement	CEM II/B-LL 42,5 R	TS EN 197-1
Composite Cement	CEM V/A (S-P) 32,5 R	TS EN 197-1
Portland Slag Cement	CEM II/A-S 42,5 R	TS EN 197-1
<b>İskenderun Facilities Branch</b>		
Portland Cement	CEM I 52,5 R	TS EN 197-1
Portland Cement	CEM I 42,5 R	TS EN 197-1
White Portland Cement	CEM I 52 R / BPÇ 52,5 R/85	TS EN 197-1 TS 21
Blast Furnace Slag Cement	CEM III/A 42,5 N	TS EN 197-1
Portland Composite Cement	CEM II/B-M (S-V) 42,5 R	TS EN 197-1
Composite Cement	CEM V/A (S-V) 32,5 R	TS EN 197-1
Ground Blast Furnace Slag	-	TS EN 15167-1
<b>Bolu Cement Branch</b>		
Portland Cement	CEM I 42,5 R	TS EN 197-1
Sulfate Resistant Portland Cement	CEM I 42,5 R-SR5	TS EN 197-1
Portland Composite Cement	CEM II/A-M (P-L) 42,5 R	TS EN 197-1
Pozzolan Cement	CEM IV/B (P) 32,5 R	TS EN 197-1
API Well Cement	Class G, Type HSR	API Spec Q1-API-10A
Ground Blast Furnace Slag	-	EN 15167-1
<b>Ereğli Branch</b>		
Sulfate Resistant Blast Furnace Slag Cement	CEM III B (S) 32,5 N-SR	TS EN 197-1
Ground Blast Furnace Slag	-	EN 15167-1
Blast Furnace Slag Cement	CEM III/A (S) 42,5 N	TS EN 197-1
Blast Furnace Slag Cement	CEM III/A (S) 32,5 N	TS EN 197-1
Blast Furnace Slag Cement	CEM III/A (S) 42,5 R	TS EN 197-1
<b>Ankara Branch</b>		
Portland Cement	CEM I 42,5 R	TS EN 197-1
Pozzolan Cement	CEM IV/B (P) 32,5 R	TS EN 197-1
Ground Blast Furnace Slag	-	TS EN 15167-1

Product Name	Type and Classification	Standard
<b>Aslan Cement Branch</b>		
Portland Cement	CEM I 42,5 R	TS EN 197-1
Portland Composite Cement	CEM II/A-M (S-L) 42,5 R	TS EN 197-1
Composite Cement	CEM V/A (S-P) 32,5 N	TS EN 197-1
Portland Composite Cement	CEM II/B-M (S-L) 42,5 R	TS EN 197-1
Portland Cement (Low Alkaline Content)	TYPE I	ASTM C 150
<b>Ünye Cement Branch</b>		
Portland Cement	CEM I 42,5 R	TS EN 197-1
Portland Composite Cement	CEM II/A-M (P-LL) 42,5 R	TS EN 197-1
Blast Furnace Slag Cement	CEM III/A 42,5 N	TS EN 197-1
Pozzolan Cement	CEM IV/B (P) 32,5 R	TS EN 197-1
<b>Mardin Cement Branch</b>		
Portland Cement	CEM I 42,5 N	TS EN 197-1
Portland Composite Cement	CEM II/A-M (P-LL) 42,5 R	TS EN 197-1
Pozzolan Cement	CEM IV/B (P) 32,5 N	TS EN 197-1
Sulfate Resistant Cement	CEM I 42,5 R-SR3	TS EN 197-1

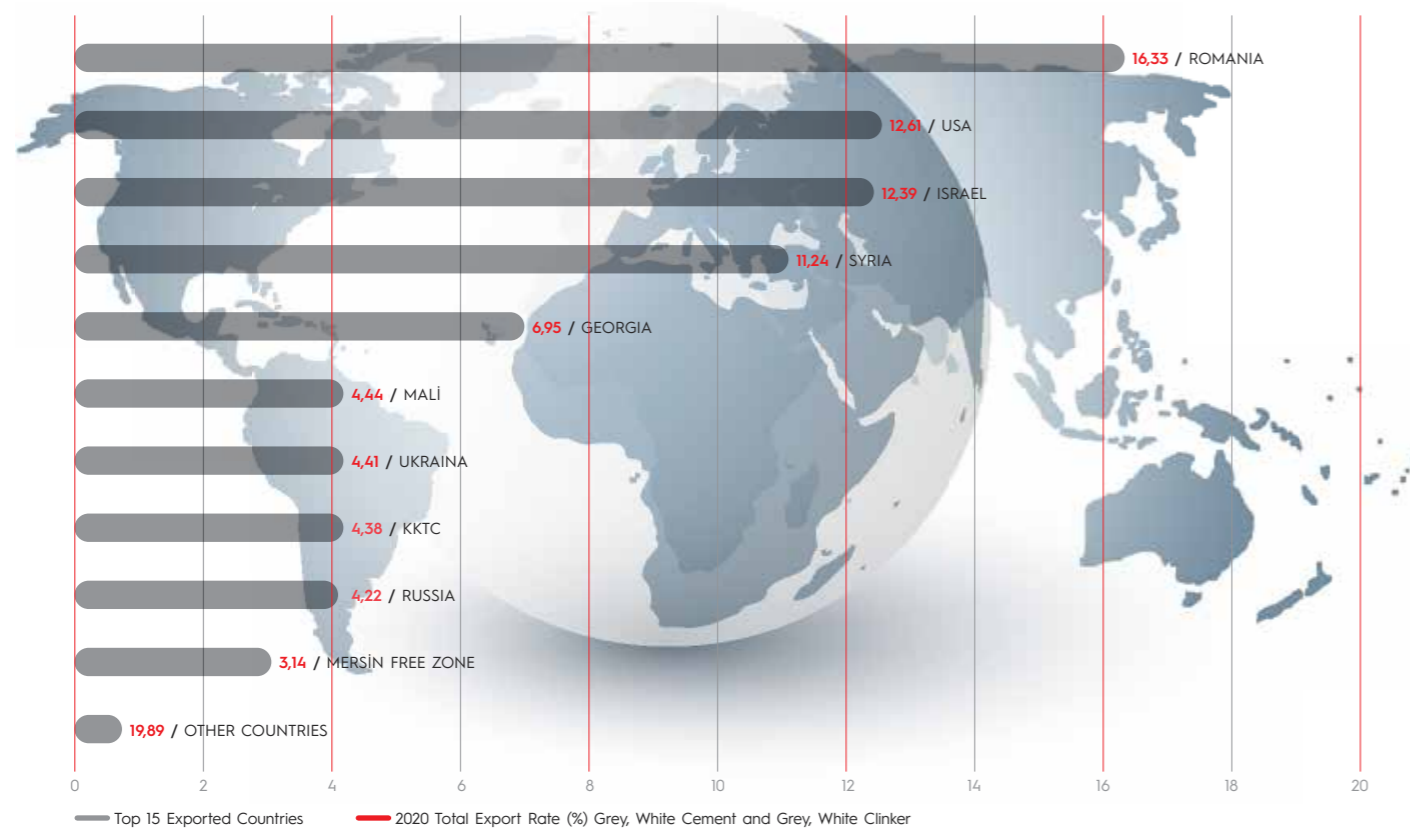




## Corporate Profile

The distribution of exports of cement and clinker by countries is given in Chart 2.  
The distribution of granulated slag exports is given in Table 10.

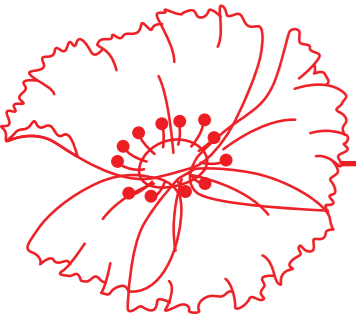
**Chart 2**  
Cement and Clinker Exports Distribution



**Table 10**  
Ground and Granular Blast Furnace Slag's Exports by Countries

Exported Countries	2020 Total Export Rate (%)
GERMANY	37,86
BELGIUM	21,83
SPAIN	10,47
EGYPT	4,85
PORTUGAL	4,50
USA	3,98
FRANCE	3,90
CANADA	3,68
LUBNAN	2,29
ITALY	1,84
OTHER REGIONS	4,40





# Corporate Profile

## OYAK Cement in 2020

OYAK Cement is working in five different regions all around Turkey which leads to sustainable development. OYAK Cement implemented a value based business model and integrated into its processes. Pressure of climate change is required to decarbonize energy in the world, at the center of OYAK Cement's short, medium and long-term plans, transition to a carbon-free process.



### INDUSTRIAL DIGITALIZATION

OYAK Cement with 4.0 Industrial Digitalization Project many firsts have been signed in terms of supported by digital transformation and artificial intelligence projects developed within the scope of transition to operation;

- Digital asset architecture
- Industrial data pool and instant traceability
- Artificial intelligence and machine learning modeling integration
- Turkey's first Automatic Machine Learning (AutoML) Platform
- Predictive process and quality control, analytical maintenance adaptation
- Unique Advanced Process Control (APC) platform
- Digital Quality Management System
- Posture Tracking and Fault Recording System
- Technical Intranet Platform: BINDER



### OCCUPATIONAL HEALTH and SAFETY (OHS) LEADERSHIP

We provided 23 person/h OHS training to our employees and the ratio of OHS trainings among all trainings was 75%.



### COVID 19 EPIDEMIC MANAGEMENT

OYAK Cement, within the scope of cafeteria regulations, allocated additional budget and appointed hygiene personnel.

Additional resources are allocated for PCR testing and testing of risky personnel is being carried out.

In the internal communication platform, a module under the heading "Coronavirus Developments" has been opened. All news and information about Covid 19 has been transferred.

Masks and face shields were provided to health institutions of the regions where we operate.

- Masks: 300,000 piece
- Visors: 2.000

The total material cost was 300,000 TL. We assigned 60 personnel for delivery of the provided material.



### OUR ENVIRONMENTAL PERFORMANCE

The total cost of our environmental investments was **27.175.159 TL**.

Alternative raw material displacement rate was **20.74%**.

Our environmental trainings were realized as 0.5 person/hour.



### CLIMATE and ENERGY

**Total production:** 20.974.602 ton (grey and white clinker, grey and white cement and slag)

**Energy consumption:** 6.775.043 Gcal 1,180,834 Gcal (17.5%) was from thermal substitution. With this savings, reduce fossil fuel use by 153,121 tons.

1,176 MWh of electrical energy was produced from our solar panels.



### CIRCULAR ECONOMY

Our investments in alternative fuel supply units continued, in the first half of 2021.

- Mardin,
- Adana,
- Bolu,
- Unye

will take place in our factories, in alternative fuel supply units.

By increasing the power of these units with the implementation of investments, It will contribute to our power to fight against climate change.

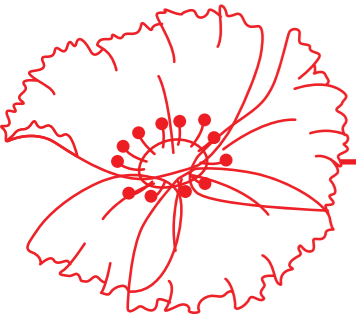
In our factories,  
Our thermal substitution rates are;  
ASLAN Cement: 100%,  
Our other branches: 80%.



### ENERGY SAVING and CO<sub>2</sub> REDUCTION

Energy saving in 2020: **117.357.220 kWh**

CO<sub>2</sub> reduction: **62.082 ton**



# Integrated Corporate Management

OYAK Cement, with a total of 9 facilities, focuses on a value based business model of creating sustainable products. Focusing and supporting corporate sustainable management models it continues its determination to create value. 6 capitals of integrated reporting were merged into our core business processes. This awareness; value in the short, medium and long term manifests itself in the processes of creating circular economy and energy. In the framework of transformation, a carbon neutral roadmap is one of our focuses.

The year 2020 is strategically the beginning of transformation.

## OUR STRATEGIC FOCUS

- Technological adaptation,
- With innovative products with low carbon emissions, to enable our customers to lead a better quality of life to enable,
- Creating the best teams within our organization,
- Energy conversion

Our value based business model is updated together with United Nations (UN) 2030 Sustainable Development Goals (SDG). 2020 was a year of reviewing and updating our management plans and also we prepared sustainable guidelines of OYAK CEMENT.

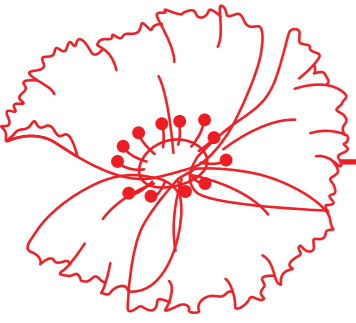
## 5S Sensitivity Rules



- Sustainable economic growth and profitability
- Circular economy
- Occupational health and safety
- Climate change and energy
- Growth in the international market
- Technological transformation and operational efficiency
- Environmental footprint
- Digitalization

We create a value with our **focusing areas** in all of our factories.





# Integrated Corporate Management

In 2020, our committees reporting to the board of directors;

## Corporate Governance

Committees have been established to facilitate the duties and responsibilities of the board of directors.

Taking into consideration the structure of the Company's Board of Directors, the Capital Markets Board with Communiqué Regarding Determination and Application of Corporate Governance Principles to fulfill the duties for the Nomination Committee and the Remuneration Committee authority, duty and responsibility to be brought to the Corporate Governance Committee was allowed.

Duties, working principles and members of the committees was determined by the Board of Directors and announced on the web page.

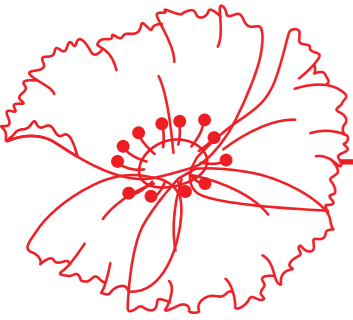
The board of directors reporting committees in 2020;



Corporate management model that has been using supporting with quality, environment, energy and occupational health and safety. Our management approach is based on corporate governance with all our stakeholders by creating value and synergies in short, medium and the long term.






Capital implementation is provided in Table 11.





# Integrated Corporate Management

Tablo 11  
**Capital Items and Applications**

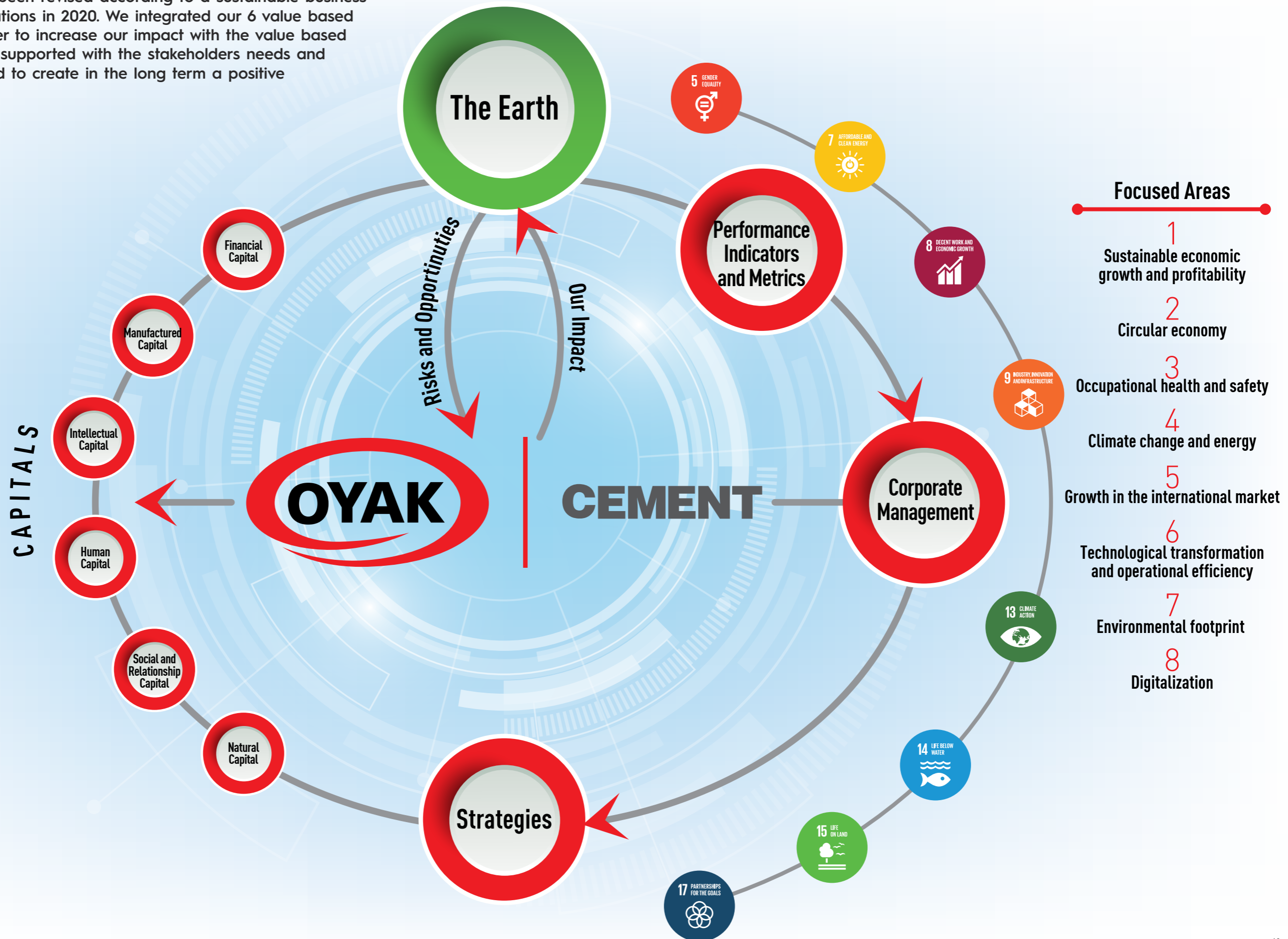
Capitals	Implementation	Integration with UN SDG
<b>FINANCIAL CAPITAL</b>	Economic growth with a net profit of 356,957,598 TL contribution has been made.	   
<b>MANUFACTURED CAPITAL</b>	<p>In our factory site where we provide our production our facilities, our waste-derived fuel plant, and with our waste heat generation facilities contributed to sustainable production.</p> <p>Depending on the use of alternative fuel the actual thermal substitution rate was 17.42% and all the highest rate of thermal substitution of all times has taken place.</p> <p>Logistic support from our ports, was 34%.</p> <p><b>1.176 MWh</b> of electricity was produced from our solar power plant.</p>	    
<b>INTELLECTUAL CAPITAL</b>	<p>An effective digital human resources management system, DIGITAL HR has been put into practice.</p> <p>SAP within the scope of corporate resource planning, different modules of the software have been used.</p> <p>OYAK Cement 4.0 Industrial Digitalization Project has pioneered digital transformation in the industry that provide handling approximately 650 billion unique records per year. This is allowed for repository, digital traceability and artificial intelligence assisted operation using for control purposes.</p> <p>R&amp;D new product development activities were carried out.</p> <p>We started to implement Ethi.co application.</p>	   

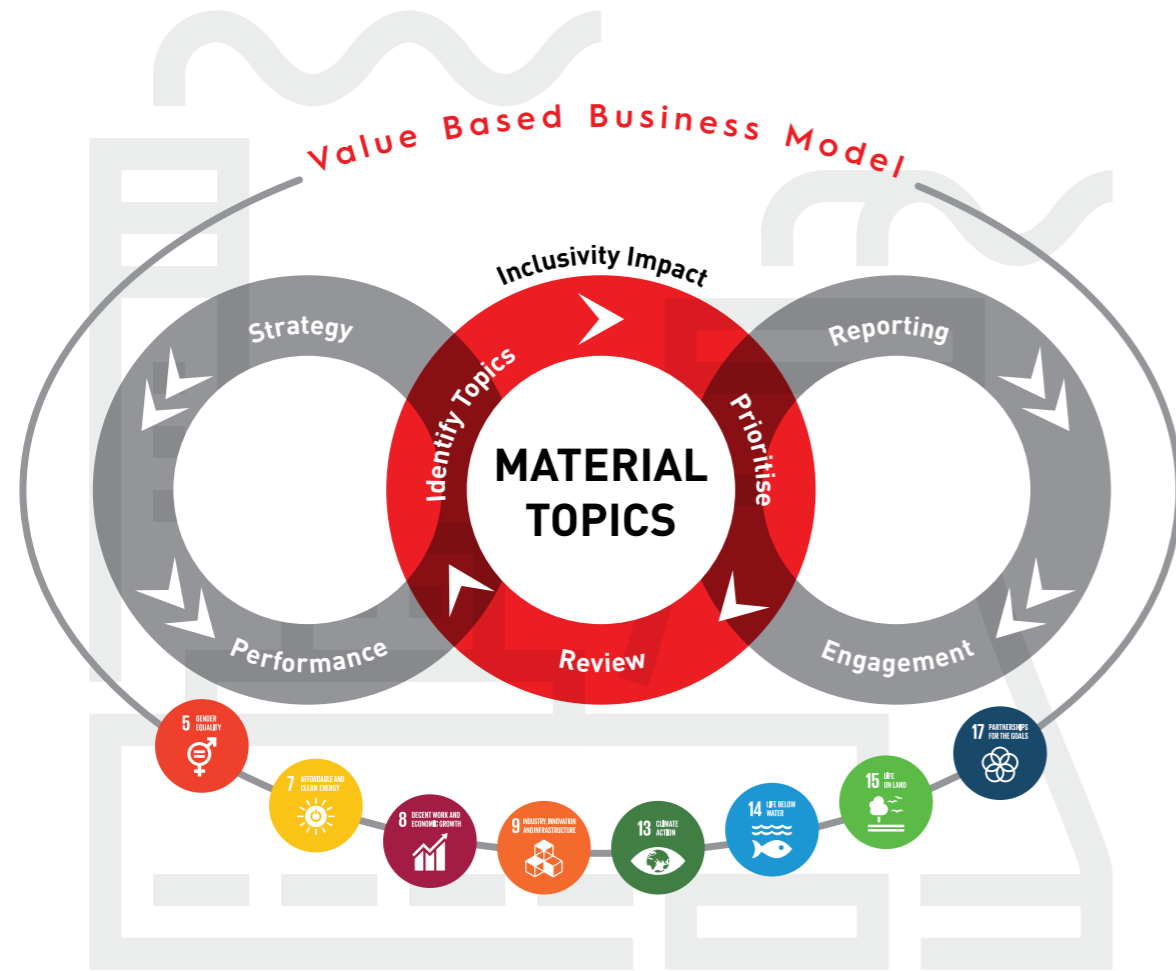
Capitals	Implementation	Integration with UN SDG
<b>HUMAN CAPITAL</b>	<p>Training, competence and development programs together with career planning programs were continued.</p> <p>Employee engagement surveys were conducted in 2019 by making comparisons in two year periods, and improvement fields were selected.</p>	      
<b>SOCIAL and RELATIONSHIP CAPITAL</b>	<p>We are implementing a sustainable business model with a framework under the 5S which is life, sustainable business, traditions, environment and international rules.</p> <p>Stakeholder management is a part of our management that supports a very strong brand image.</p>	   
<b>NATURAL CAPITAL</b>	The Zero waste program was implemented under the circular economy. We started to work with the Concrete Sustainability Council.	    

# Business Model and Creating Value

Our business processes have been revised according to a sustainable business model that covers all our locations in 2020. We integrated our 6 value based capitals with UN SDGs in order to increase our impact with the value based business model. This model is supported with the stakeholders needs and expectations that we expected to create in the long term a positive impact in our society.

## Our Stakeholders



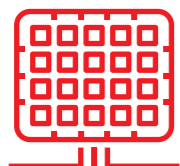


### Our Materialities

Sustainable economic growth and profitability



Growth in the international market transformation and operational efficiency



Circular economy



Technological transformation and operational efficiency



Occupational health and safety



Environmental footprint



Climate change and energy



Digitalization

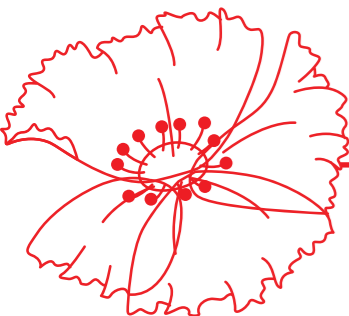


A close-up photograph of a field of red poppies. The flowers are in various stages of bloom, with some showing dark centers. The background is a soft, out-of-focus mix of green and yellow, suggesting a sunny day in a field. The overall tone is warm and natural.

2

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# Management Strategy



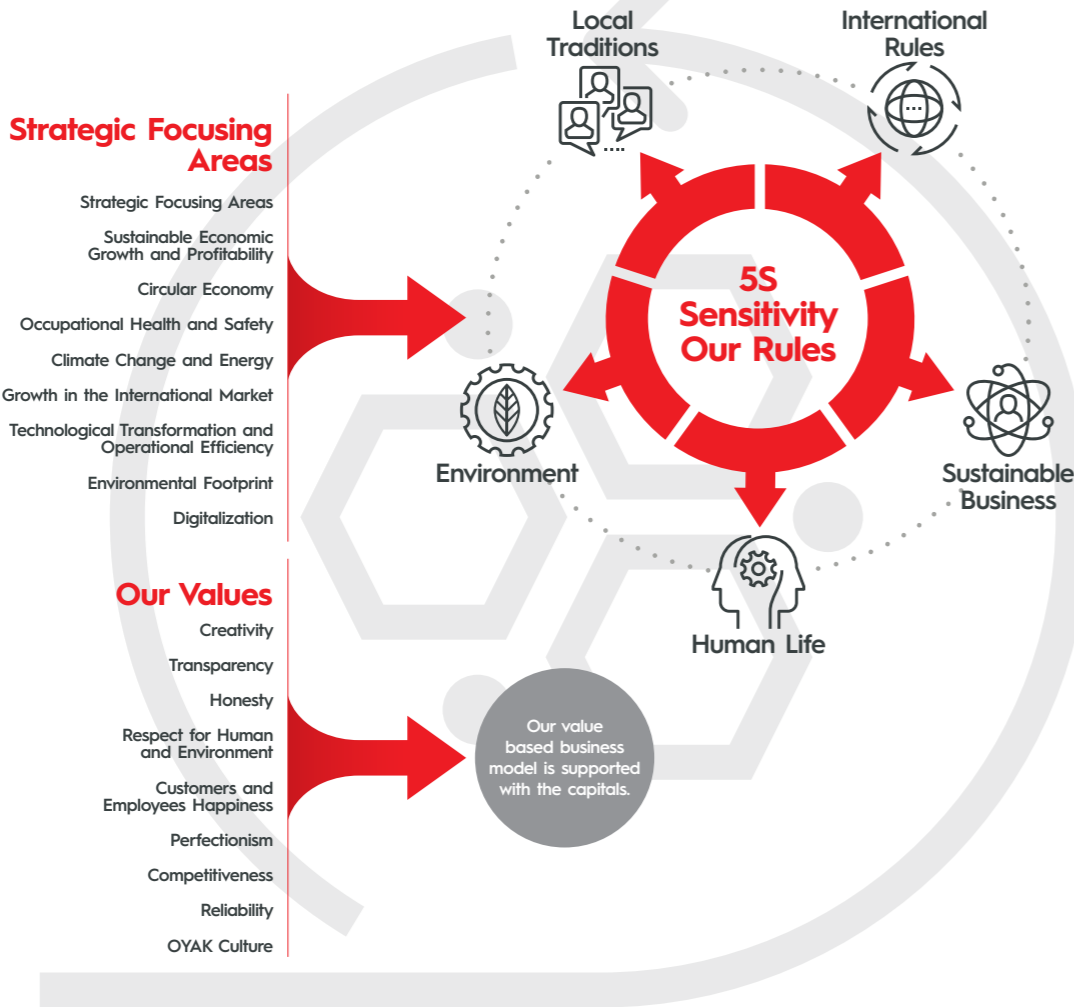
In line with the growth target of our country, we are working towards making transactions in international markets and carrying our competition to global markets. OYAK Cement has 15% of the total clinker production capacity of Turkey with its 7,536,107 tons of clinker production and 16% of the total cement production capacity of Turkey with its 9,372,672 tons of cement production.

We are in a period where works on energy transformation is followed closely to assess risks and opportunities in the industry.

With the COVID-19 pandemic showing its full impact all over the world in 2020, crisis management has become one of our priorities.

As the management, we have also started a process in which sustainability is at the core of our business and management is designed with our capitals.

Works on the integration of sustainable management with business processes and establishment of a management system is ongoing.



Focus Areas	Key Indicators	UN, SDG
<b>Sustainable Economic Growth and Profitability</b>	Thermal substitution and alternative raw materials rates will increase and energy costs reduction will continue our focusing area in the short, medium and long term.  Our business model's impact will be adapted to metrics in order to measure our impact.	
<b>Circular Economy</b>	Under the Zero waste implementation to use alternative raw materials and thermal substitution is being targeted.	
<b>Occupational Health and Safety</b>	Leadership and safety culture in OHS dissemination of stakeholders (subcontractors and contractors) with OHS campaigns increasing their competencies.  Fighting with Covid 19 epidemic system's efficiency will be increased.	
<b>Climate Change and Energy</b>	Usage of thermal substitution, alternative raw materials, waste heat recovery, additive cement production together with energy efficiency projects will continue within aim of GHG reductions.	
<b>Environmental Footprint</b>	Air quality, water and biodiversity monitoring under the sustainability performance indicators will continue.	

**We aim to have a stronger position in the international markets after the merger.**

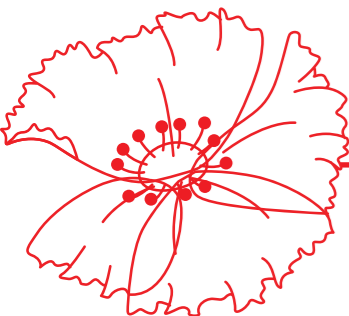
We touch all our shareholders' lives with respect to the environment and society providing sustainable profitability.

A low-angle photograph of a field of red poppies. The flowers are in various stages of bloom, with some fully open and others as buds. The stems are green and thin. The background is a bright blue sky with scattered white clouds. A strong sun is visible on the right side, creating a lens flare effect that illuminates the scene.

3

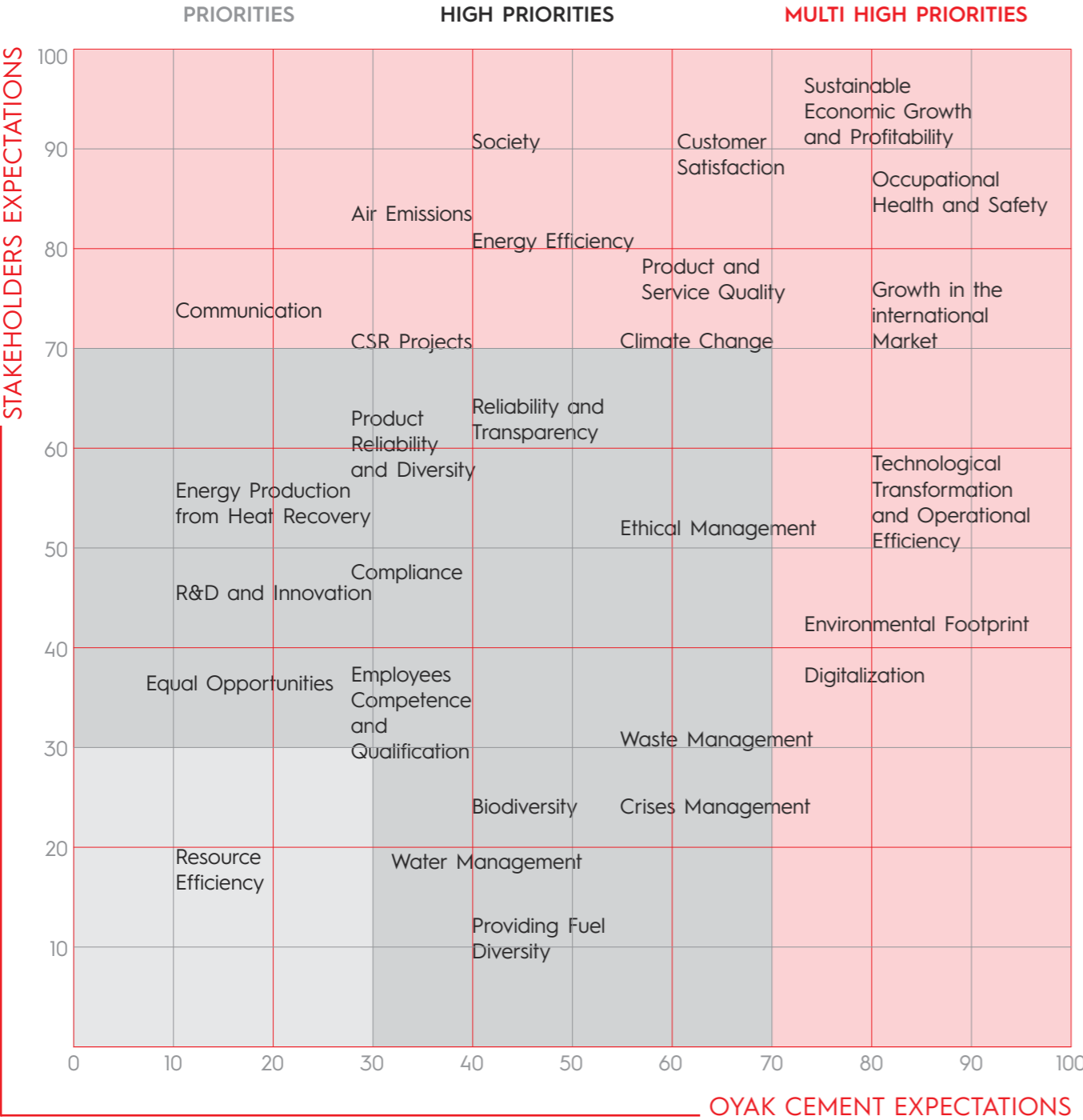
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# Stakeholder Engagement and Materiality



OYAK Cement analysing needs and expectations of stakeholders, reviewing its risks and opportunities. After re-organization and merging process, materiality index updated together with stakeholders (Chart 3).

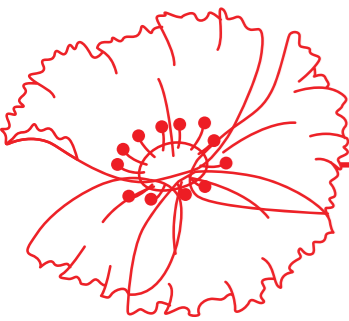
Chart 3  
Materiality Matrix



Communication with stakeholders is given in Table 12.

Table 12  
Stakeholder Communication

Stakeholders	Communication Channel
Employees	Process management meetings, sustainable management and integrated management systems, employee satisfaction surveys and ethics line, employee support programs and CSR projects.
Shareholders	General assembly, integrated report, annual report, social media and corporate governance compliance report.
Customers	Marketing activities, B2B meetings, management visits, dealer meetings, customer satisfaction surveys and visits.
Society	Stakeholder meetings, supplier days, corporate social responsibility (CSR) projects and sectoral days.
Suppliers	Tenders, purchasing management, integrated report, social and environmental inspections, meetings and web page.
Ministries/Local Administration/Public Organizations	Integrated report, compliance processes, meetings, conferences and information systems.
NGOs/Sectoral Institutions/Universities	Conferences, meetings, newsletter, CSR projects, integrated report and web page.

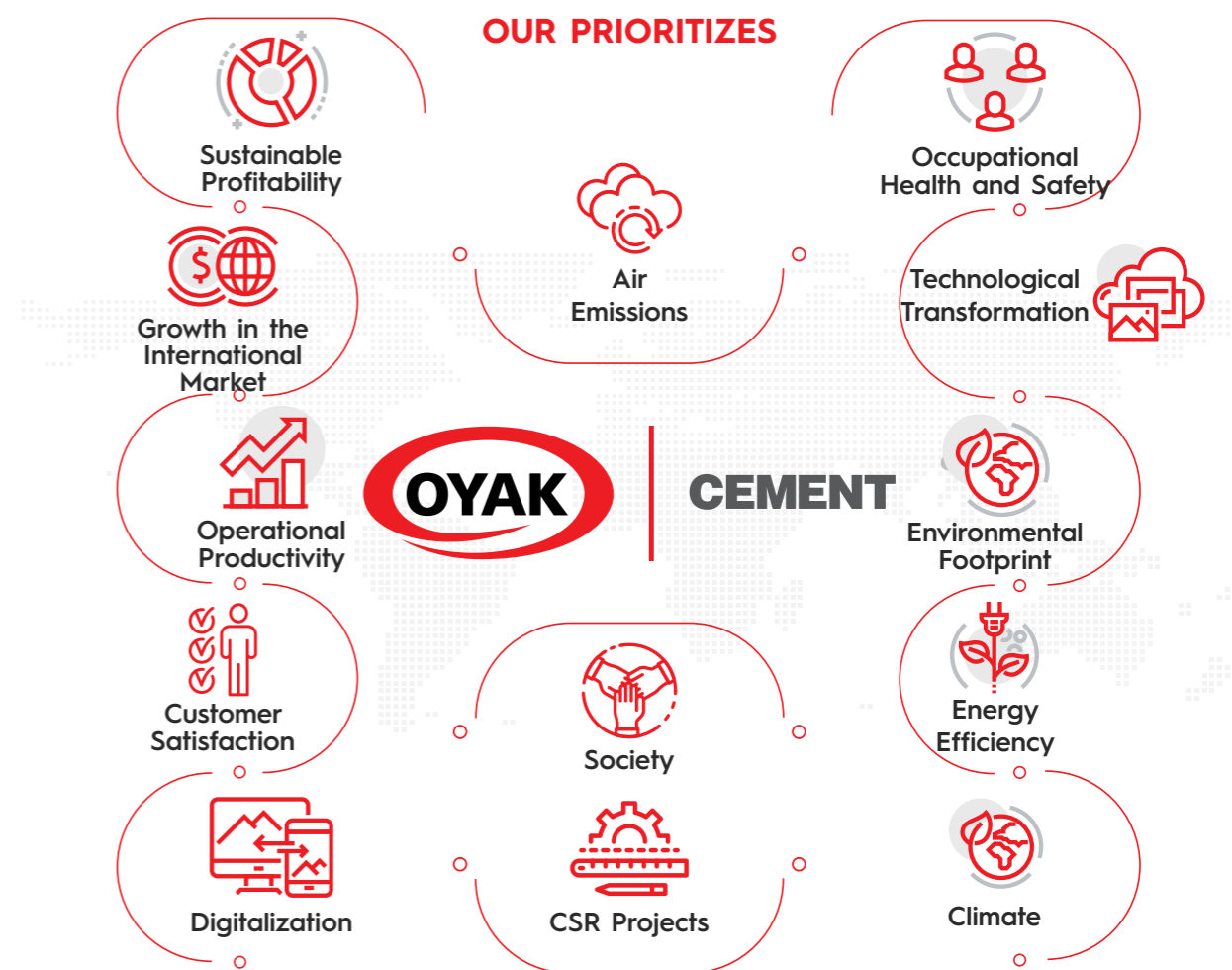


## Our Prioritized Stakeholders, and Their Integration with Sustainable Development Goals

Stakeholder engagement and materiality topics have been prepared and our material issues matrix is supported to the UN SDG is given in Table 13.

**Table 13**  
Stakeholders and Their Needs and Expectations

Stakeholders	Needs and Expectations	UN, SDG
<b>Employees</b>	<ul style="list-style-type: none"> <li>- Career Planning and Personal Development</li> <li>- Business Ethics</li> <li>- Gender Equality</li> <li>- Commitment of Employee and Satisfaction</li> <li>- Occupational Health and Safety</li> <li>- Energy Efficiency</li> <li>- Contribution to Society with Environmental and Social Practices</li> </ul>	   
<b>Shareholders</b>	<ul style="list-style-type: none"> <li>- Sustainable Profitability</li> <li>- Compliance with Laws</li> <li>- R&amp;D - Innovation</li> <li>- Operational Efficiency</li> </ul>	  
<b>Customers (Dealer and end user)</b>	<ul style="list-style-type: none"> <li>- Customer Satisfaction</li> <li>- Product and Service Quality</li> <li>- Reliability and Transparency</li> <li>- Product Variety</li> </ul>	  
<b>Society</b>	<ul style="list-style-type: none"> <li>- Impact on Social Development</li> <li>- Employment</li> <li>- Reducing Environmental Impact (water, greenhouse gas emissions reduction, emission/ dust reduction, circular economy, conservation of biodiversity)</li> </ul>	     
<b>Suppliers</b>	<ul style="list-style-type: none"> <li>- Transparency in Managerial Processes</li> <li>- Reliability</li> <li>- Business Continuity and Sustainable Profitability</li> </ul>	 
<b>Ministries/Local Administration/ Public Organizations</b>	<ul style="list-style-type: none"> <li>- Ministries/ Local Authorities/ Public Institutions</li> <li>- Societies Development and economic improvements</li> </ul>	   

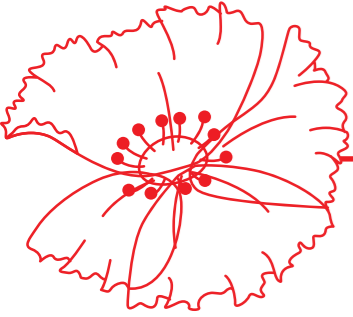




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# Risks and Opportunities



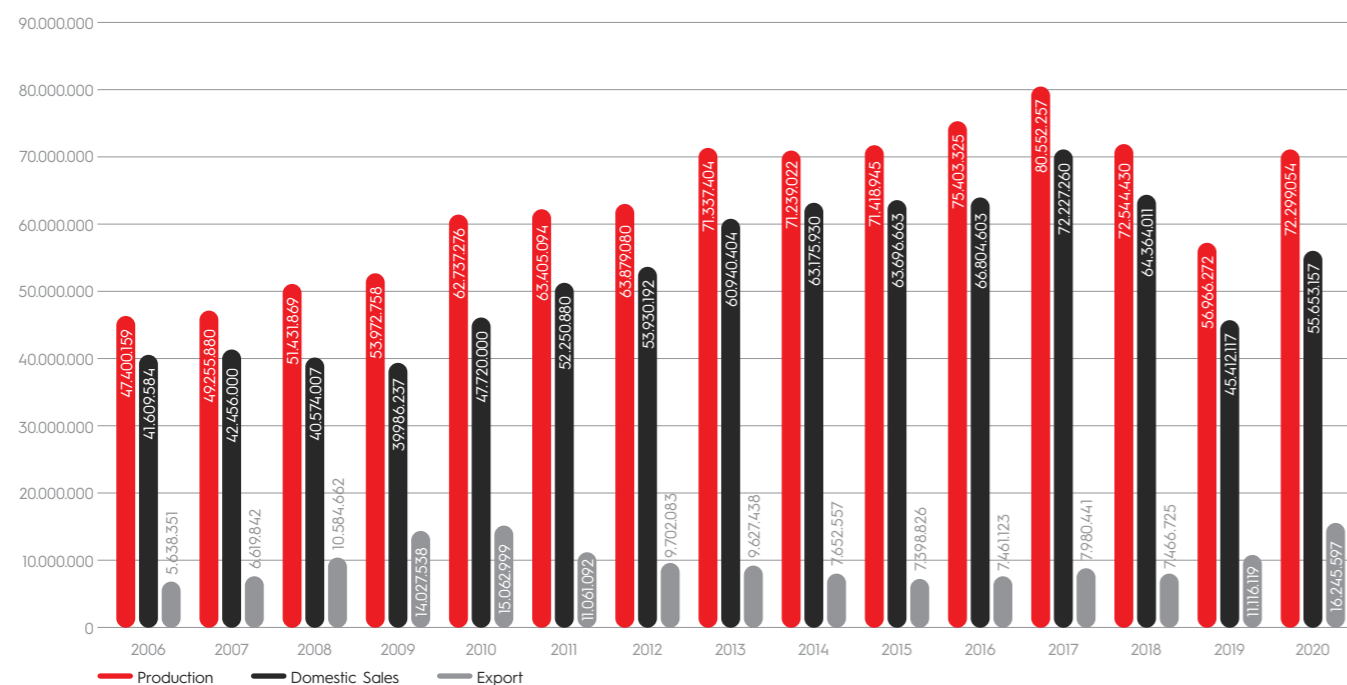
## Sectoral Outlook

There has been a 26.9% increase in cement production in 2020 compared to the previous year. 22.5% of this production was exported in 2020. Compared to the previous year and increase of 22.6% in domestic sales and of 46.1% in export was recorded.

Domestic sales and export figures for cement per ton between the years 2002-2006 are shown in Chart 4.



**Chart 4**  
Yearly based comparison between cement, production and sales



We will continue to use the Triple Bottom Line (TBL) approach more in our business model.

In accordance with ISO 9001-14001-50001 standards and ISO 45001 Standards which we will adopt in 2021, we use the integrated management system in our operational processes at OYAK Cement and evaluate risks and opportunities and identify needs and expectations of stakeholders with management. Our goal is to evaluate our performance with the indicators that can increase our short and midterm impact. We are aiming for a transition based on management of outputs with impact assessment.

## Financial Risks and Opportunities

Within the scope of operational risks, we give priority to the management of financial losses due to failing to fulfill contractual obligations and credit reliability. Credit exposure and credit ratings of our customers are continuously monitored in our activities.

**Financial risks are monitored and managed at an operational level.**

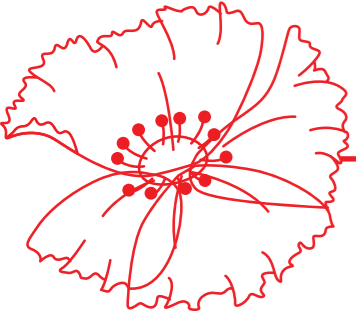
## Operational Risks and Opportunities

Operational level risks are monitored and managed through integrated management systems depending on the business process. Integrating core business processes with the capitals also enables us to update risks and opportunities annually and/or more frequently where necessary.

Sea transportation is done through,

- OYAK Aslan Cement Branch,
  - OYAK Ünye Cement Branch, Çayeli Plant,
- Maritime transportation comprises 50% of all shipments from Ünye Cement, Çayeli Plant, whereas this percentage is 18% at Aslan Cement.

**It is an important advantage for us to have access to logistic networks with our port facilities at OYAK Aslan Cement and Ünye Cement Çayeli plants.**



Two ports at Marmara Sea and Eastern Black Sea provide logistic advantages. In our maritime operations, "Risk Assessment and Contingency Plan" are prepared according to our compliance requirements, and the process is supported by training and drilling exercises within the scope of oil spill and other hazardous materials.

Additionally, our ports are subject to International Ship and Port Facility Security (ISPS) Code.

### Sustainability Risk and Opportunities

In 2020, Covid 19 pandemic forced us to experience a period where we question the new normal in our processes. Parallel to the developments in the world, the European Union's "Green Deal" dated December 2019, with its major promises and ambitious vision, provides the opportunity to prepare for a carbon-neutral future with sustainable buildings, cement and concrete with an attempt to be a solution to environmental problems.

Following the implementation and implications of the Green Deal of the EU in cement industry and fighting with the medium and long-term risks of climate changes are one of our medium-and long-term priorities.

The percentage of greenhouse gas emissions of the Cement Industry represents 11-12% of total emissions in the country. With the goal of being carbon-neutral by 2050 in the cement industry;



Increasing the utilization rate of biomass wastes,

Electricity generation with waste heat recovery technology providing and increasing facilities,



With increasing additives low carbon cement production,

R&D and Innovation studies on carbon capture, carbon use and storage is encourage.



**It will be ensured that cement is transformed into a construction material with low carbon footprint through different innovations and designs.**

The Green Deal underlines the key role the effective industrial strategy will play, and aims to lead industries in becoming carbon-neutral, and our company has the technical experience to turn this condition into an opportunity.

Cement has a high risk of being affected by the climate crisis processes, and therefore uncertainties are closely monitored and opportunities are utilized.

To save energy, solutions that focus on turning opportunities into innovations with our management processes and ISO 50001 energy management system will allow us to turn risks into opportunities.

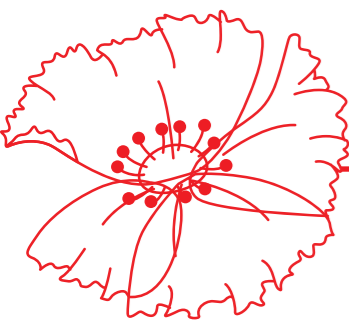


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# R&D and Innovation





We focus on the climate risks, the transition to a carbon-neutral world in 2050, our target is also committed to the carbon neutral 2050 roadmap. We are increasing our impact with our value-oriented business model. In line with this goal, we see R&D and Innovation as an opportunity. Our R&D activities;

- Calcined clay innovation with a low carbon footprint
- Development of a new generation geopolymers binder focused on industrial symbiosis
- Adaptation of high energy efficiency focused ceramic grinding elements to the cement process

#### Branch Name

#### R&D and Innovation Activities

##### Mardin



Certain additives of CEM IV/B 32.5 N cement with high resistance to heat and combustion continuation of the concrete production project.

##### Bolu



Reducing clinker use, CEM II A-M(S-L) 42,5R production was started. Instead of our main product, CEM I 42,5R type cement, CEM II A-M (S-L) 42,5R type cement has been our main product.

##### Aslan



The unusable dolomitic limestone used as a cement additive mortar and ready-mixed concrete works were carried out. That material's will be used in our processes.

##### Ankara



CEM I 42,5R type cement with slag and limestone additives can replace the CEM II/ A-M (S-L) 42,5R type trial work on cement in 2020 made and the product's Performance Constancy Certificate taken. Laboratory and industrial studies continue. Clinker reduction in cement caused CO<sub>2</sub> emissions reduction, recycling of the by-product slag and improving cement properties is targeted.

##### Ünye



New product developments;

The blended cement with CEM I 42,5R performance (CEMENTUM) industrial trials continue.

Alternative raw material and fuel use implementation; calorific mixing of domestic waste-derived fuel with coal replacement rate and alternative iron-containing industrial trials of raw materials continue.

##### Adana



"For Component Design of Blast Furnace Slag Cements An Artificial Intelligence Based Decision Support System" project that was collaboration with TUBITAK and Cukurova University was completed in 2020. The software that is the output of the project, started to be used in Iskenderun Plants.

A close-up photograph of a red poppy flower in sharp focus, with its petals showing delicate veining. The flower is set against a soft-focus background of other poppies and green stems under a clear, bright blue sky. The lighting is natural, highlighting the texture of the petals.

6

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# Sustainability Performance



## 6.1. Environment Indicators

In our processes with which we monitor our environmental performance and support them with our goals, a wide range of subjects including environment, water, climate and energy, flue gas emissions, circular economy and biodiversity are shared. In all of our operations, our operational processes are monitored with the integrated ISO 9001- 14001- 45001 and 50001 management systems.

In 2020 all of our facilities adopted Zero Waste Project of the Turkish Ministry of Environment and Urbanization and were granted basic level Zero Waste Certificate.

### Environment

All environmental compliance requirements are met in our plants. Our investments for environmental compliance are geared towards improvement on a voluntary basis and are shown in Table 14. Waste feeding systems, filter investments (bag type filters for cooling electro filters) improvements in transmission lines are among our environmental investments.

There are two ports in our Aslan Cement and Ünye Cement plants which are in accordance with the 5312 numbered by Law and required Risk Assessment and Contingency Plans are approved by the Ministry of Environment and Urbanization. All required drilling exercises are done under the supervision of the Turkish Ministry of Transportation and Infrastructure pursuant to this law.

**Table 14**  
**Environmental Investments**

Factories (Investments TL)						
Years	Ankara Cement	Mardin Cement	Ünye Cement	Adana Cement	Aslan Cement	Bolu Cement
2020	960.900	174.400	1.693.639	11.041.929	12.001.485	1.302.806
2019	10.588.202	229.000	3.077.143	1.344.205	19.458.891	4.429.134
2018	65.170	889.920	0	238.698	5.402.917	1.203.305
2017	302.736	306.000	25.942.995	1.061.324	1.333.346	1.893.532
2016	717.090	167.980	5.088.798	3.091.554	2.906.533	1.388.247

Environment performance indicators (EPI) are given in Table 15.

**Table 15**  
**Environment Performance Indicators**

Performance Indicators	2018	2019	2020
Environmental Accident Number	0	0	0
Environmental Trainings (person hour)	297	594	608
Thermal Substitution Rate (%)	7,91	12,29	17,42
Raw Material Substitution (ton)	669.730	645.280	492.705

### Water

OYAK Cement is considering water usage with an impact on ecology, human and resources. Water management is a parameter that is followed within our sustainability metrics. Water needs and usage also change according to the products. Wastewater amounts are given in Table 16.

Water consumption rates are given in Table 17.

**Table 16**  
**Waste Water Uses**

Wastewater by Source	2020 Wastewater (m³)					
	Bolu Cement	Aslan Cement	Adana Cement	Ünye Cement	Mardin Cement	Ankara Cement
Surface Water	-	6.367	-	-	-	All wastewater is recycled in the process. 35% of the recycled water is consumed in the factory.
Ground Water	31.025	-	1.141.670	236.493	112.200	
Sea	-	8.709.603	-	-	-	

**Table 17**  
**Water Consumption**

Water Consumption by Source	2020 Water Consumption (m³)					
	Bolu Cement	Aslan Cement	Adana Cement	Ünye Cement	Mardin Cement	Ankara Cement
Municipal Water	-	40.835	7.880	-	-	-
Surface Water	-	-	65.414	-	-	-
Ground Water	174.235	79.760	655.108	236.493	112.200	52.911
Amount of Recycled / Reused Water	8.300	8.267	4.193.515	-	-	28.790



## Climate and Energy

Under the pressure of climate change, the energy transition is carefully monitored in our industry. In our sector, within the scope of reducing greenhouse gas emissions related to vehicle use, In 2020, the project of organizing economical driving training was created and in 2021, will be applied. CO<sub>2</sub> values per ton of produced clinker and cement according to branches distribution is given in Table 18.

**Table 18**  
**Annual CO<sub>2</sub> Distribution in Clinker and Cement Production**

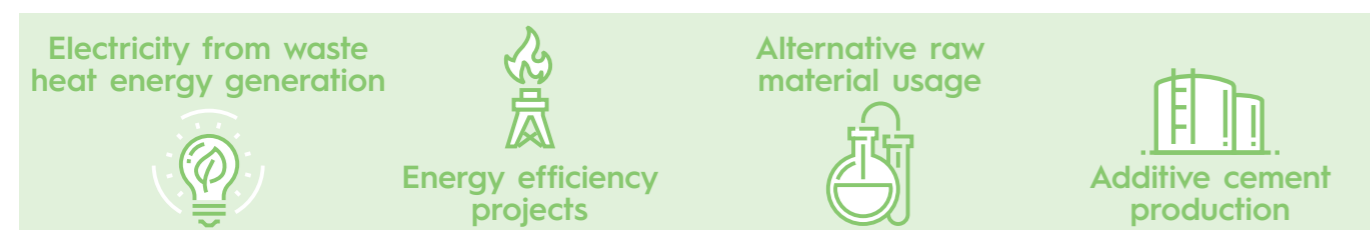
	Aslan		Mardin		Ünye		Adana - White		Adana - Grey		Bolu		Ankara	
Years	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker	ton CO <sub>2</sub> / year	kg CO <sub>2</sub> / ton clinker
2015	981.042	900	755.367	840	1.004.487	878	274.987	1106	1.658.690	930	1.197.147	960	486.356	895
2016	1.083.818	899	708.476	839	1.350.566	890	389.377	1140	1.567.848	930	1.056.577	930	931.018	850
2017	1.057.897	875	909.864	811	1.181.818	880	443.614	1150	1.466.035	950	972.932	910	1.035.451	815
2018	1.082.809	896	847.224	870	1.176.921	829	530.022	1030	1.473.922	900	1.046.007	880	983.390	850
2019	995.260	886	603.223	870	901.777	849	524.843	1009	1.177.320	930	663.591	890	646.951	850

Total energy savings of all our branches in 2020 are given in Table 19. Greenhouse gas reduction values depending on energy saving are also shared in the same table.

**Table 19**  
**Energy Saving Distribution**

Branches	2020 Total Energy Saving (kWh)	2020 Total Energy Saving (TL)	2020 Total GHG Reduction (ton CO <sub>2</sub> )
Ankara Çimento	737.892	361.567	317,3
Mardin Çimento	900.711	387.168	387,2
Ünye Çimento	8.267.718	4.133.912	3.555
Adana Çimento	16.771.706	7.514.861	8.968
Aslan Çimento	90.330.707	40.726.358	42.473
Bolu Çimento	471.600	177.972	256,5

Fighting against climate change, provide energy efficiency. Reduction of GHG studies are continue.



Our energy efficiency projects realized in 2020:

Branch	Project	CO <sub>2</sub> Savings ton	Energy-saving kWh
<b>Bolu</b>	Installing a driver on the coal feed auger	7441	13680
	3. Driver application to cement mill filter fan	49351	90720
	Temperature-controlled operation of technological pool water pumps	49351	90720
	Clinker silo side filter fan pulley diameter change	21150	38880
<b>Aslan</b>	Clinker production line modernization project	20.379	47.502.558
	Increasing the cement production additive ratio	15.025	16.477.958
	Electricity generation from waste heat	15.025	26.350.191
	Alternative fuel use project	The thermal power required for the production was replaced with thermal substitution rather than fossil fuel therefore CO <sub>2</sub> savings is not a case.	
<b>Adana</b>	5. Hot gas line from rotary kiln to coal mills	7.027	13.140.959
	4. Canceling the bunker in the rotary kiln waste feed line	18	33.594
	6. Reducing cement mill ball charge charge	205,23	383.775
	5. Making the cement mill system fan driven	168,6	315.362
	6. Making the cement mill system fan driven	196,2	366.956
	1. Making coal mill separator fan with driver	87	162.770
	5. Project to increase the production capacity of the rotary kiln	171,75	321.176
	3rd and 4th cement mill capacity increase	1028,3	1.923.000
	Aerobic Biological Treatment facilities automation in Iskenderun I and II facilities	14,98	28.006
	Ensuring working time optimization by connecting to the system	51,39	96.108
<b>Ünye</b>	Automating the control of compressors and dryers and adding automated valves to the lines		
	Compressed hot air detection	183,2	426.048
	Raw mill lock plate replacement	3370,4	7.838.166,32
<b>Mardin</b>	Efficient engine application	1,51	3.504
	Replacing the lighting system with an LED lighting system	38,3	89.315
	Automation of the lighting system	18,3	42.516
	Replacement of K line flue gas fan with high efficiency fan	194,5	452.360
	2. Rotary Kiln cooling electrofilter fan with high efficiency fan magnification	136,1	316.520
<b>Ankara</b>	2 and 3. Installing a frequency converter on the compressor	221,67	515.520
	Adjusting the compressor operating pressure range from the PLC system	51,41	119.556
	Stopping the compressors from the PLC system according to the pressure	44,21	102.816



Air Emissions

NOx and dust emissions, arising due to the processes in the cement sector in 2020, are being followed-up by the Ministry of Environment and Urbanization of Republic of Turkey through the Continuous Emission Monitoring System. NOx, SO<sub>2</sub>, Total Organic Carbon (TOC), HC, HCl and dust emissions of all our plants for 2020 are given in Chart 5, 6, 7, 8, 9 and 10.

Chart 5  
2020 NOx Distribution

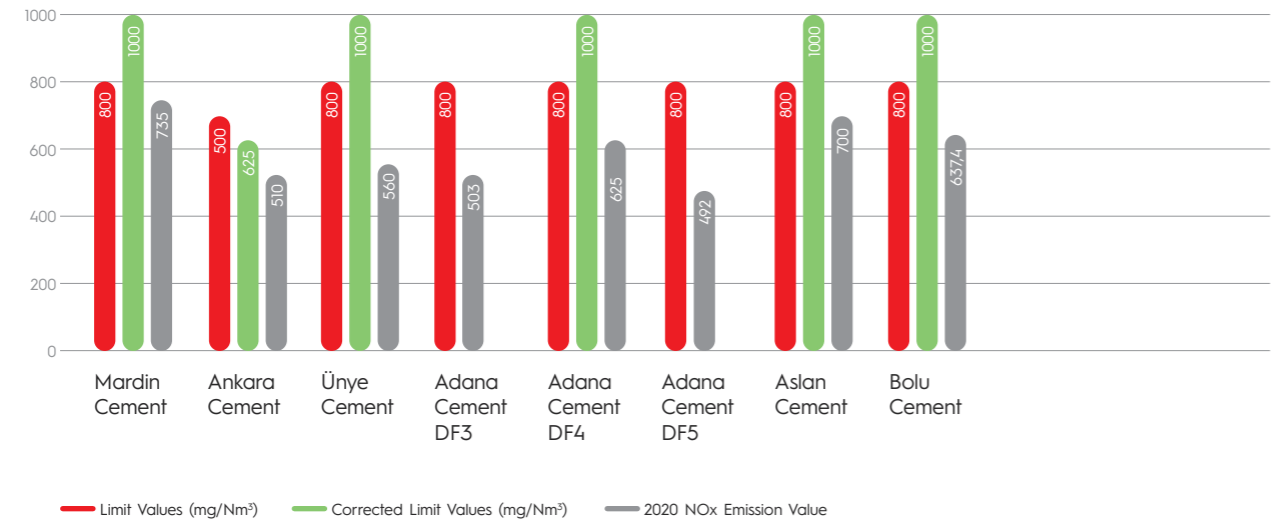


Chart 6  
2020 SO<sub>2</sub> Distribution

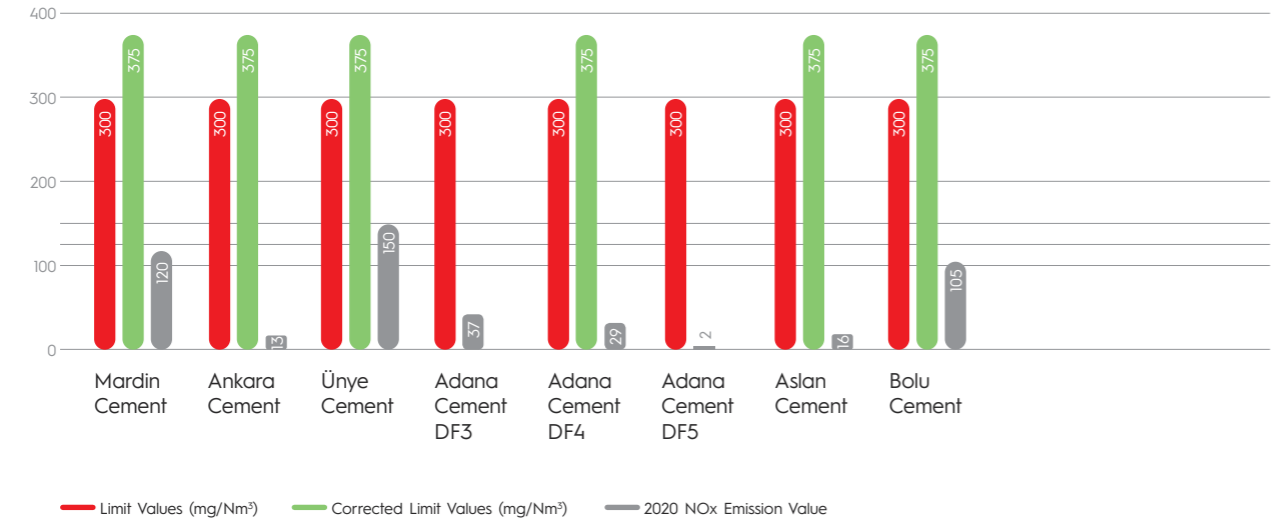


Chart 7  
2020 TOC Distribution

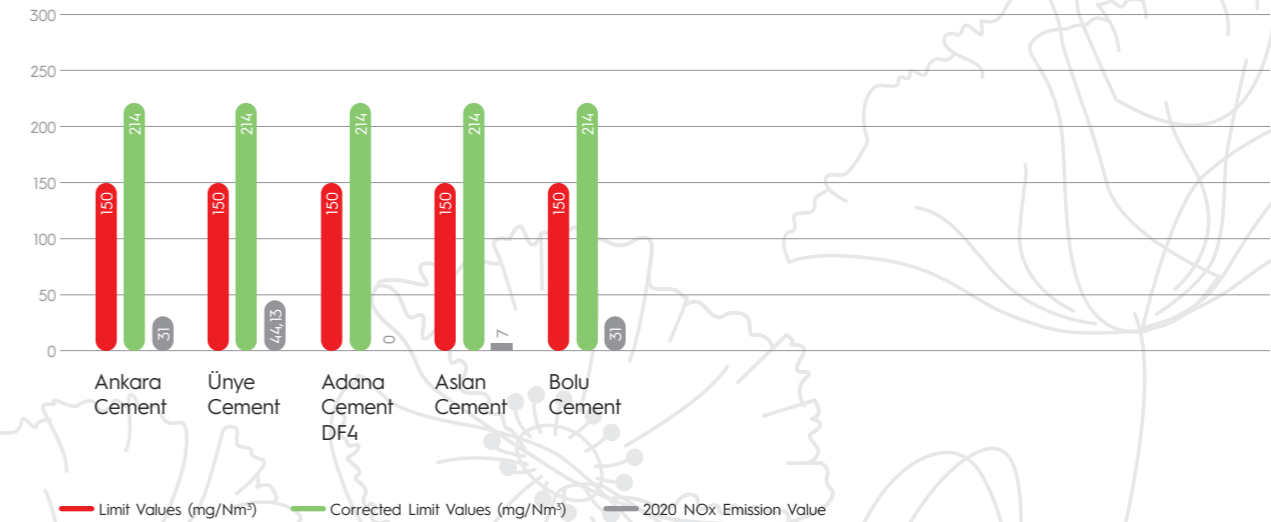
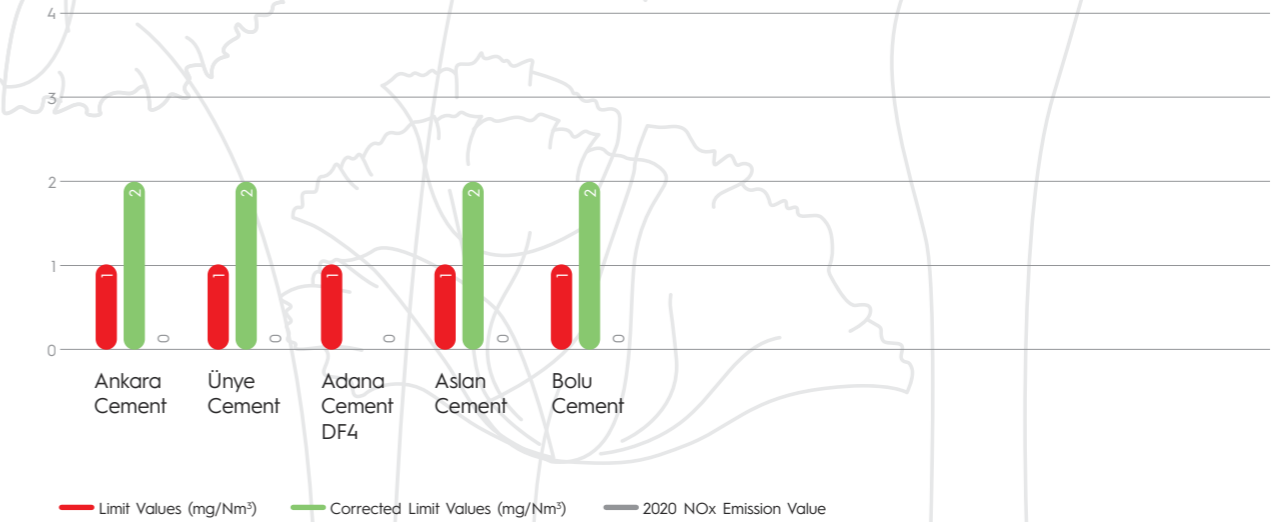
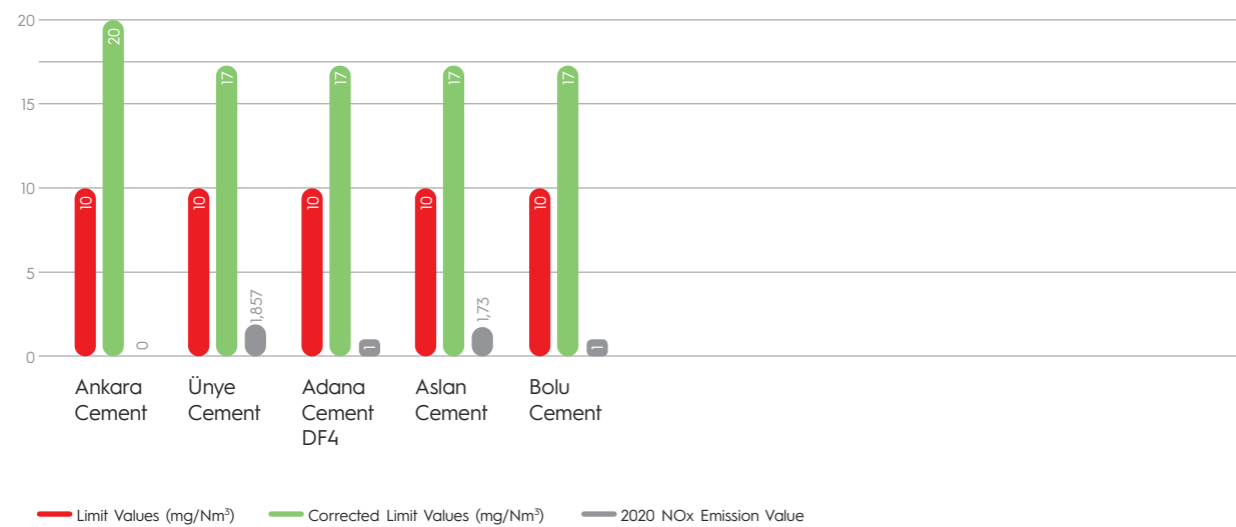


Chart 8  
2020 HF Distribution

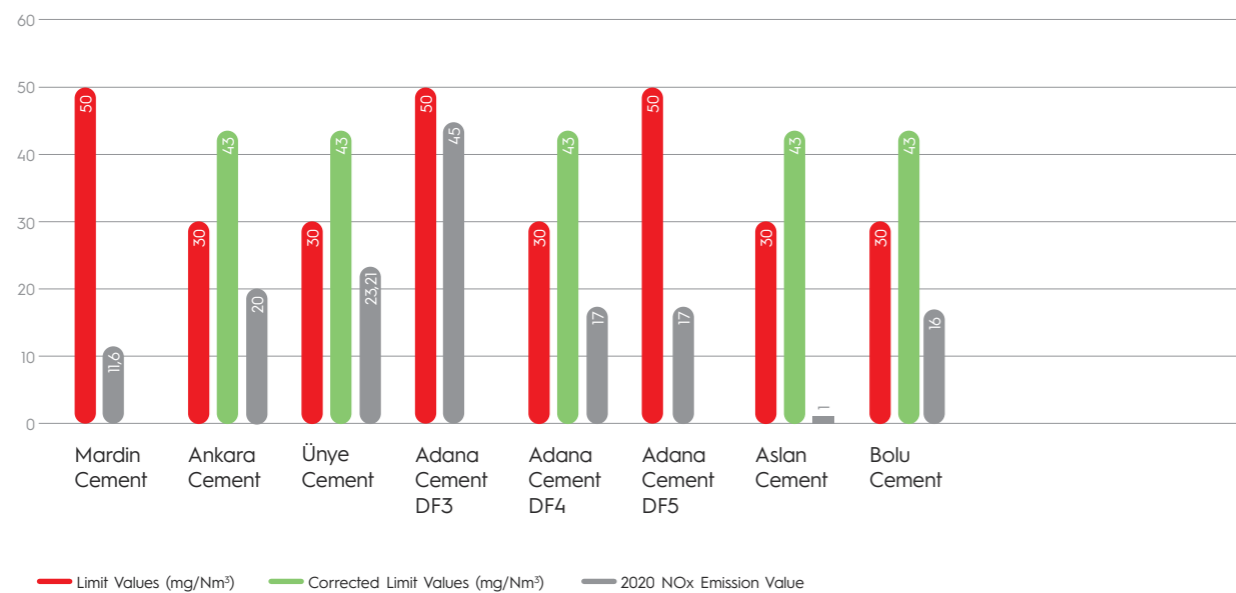




**Chart 9**  
**2020 HCI Distribution**



**Chart 10**  
**2020 DUST Distribution**



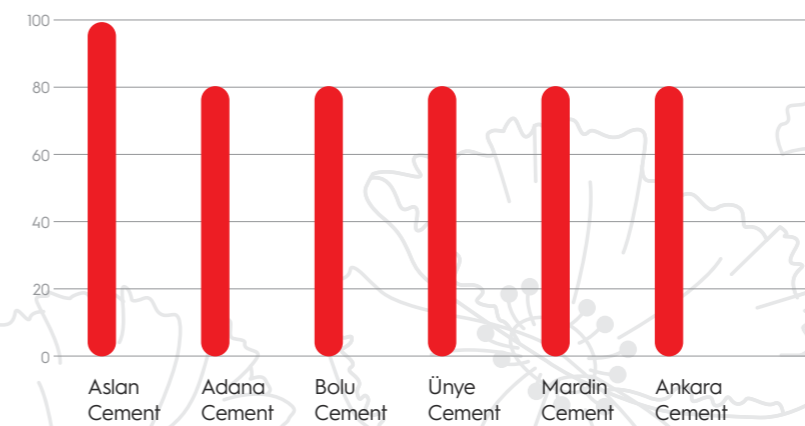
## Circular Economy

Circular economy is a strategic focusing area for OYAK Cement therefore, that targets to increase thermal substitution rates. Therefore, all resource saving and carbon footprint will reduce accordingly.

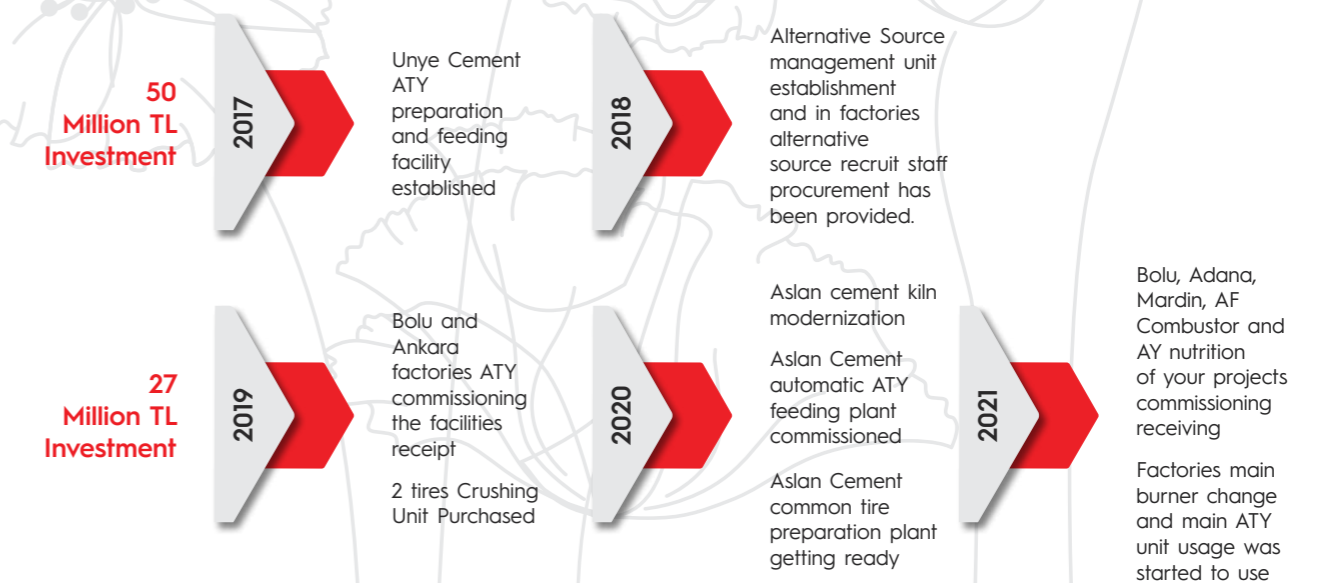
### Alternative Resource Usage

We target to use alternative sources that will be provided to save usage of natural resources. Alternative sources replacement rates are given in Chart 11.

**Chart 11**  
**Permitting Replacement of Alternative Sources**



Our investments to increase to use of alternative sources in our factories:



Our target is to exceed Thermal Substitution (TS) rate to %35 in 2025.



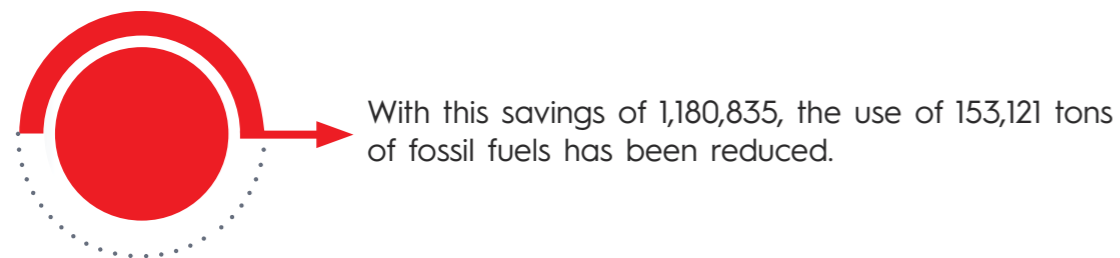
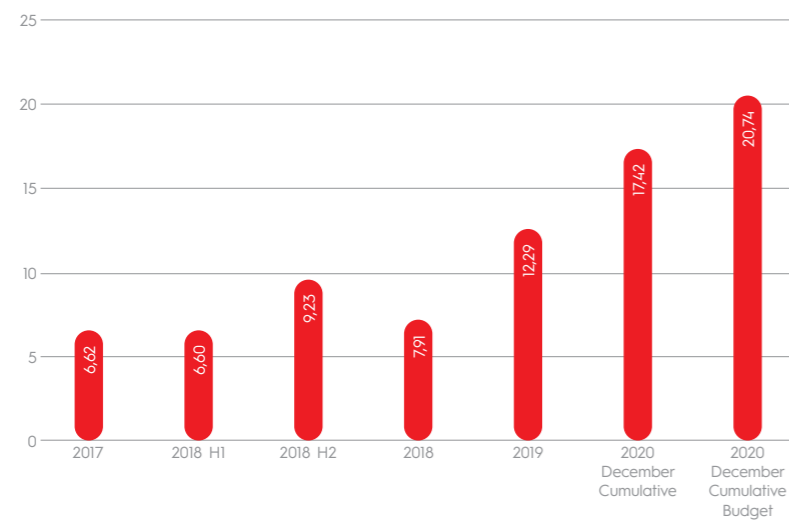
### Thermal Substitution Usage

Our incineration licenses were renewed in 2020 for all our factories.

In 2020, the thermal substitution rate of all our plants reached 17.7%. In March 2020, the highest thermal substitution rate of all time reached 21.29%.

Our thermal substitution rates are given in Chart 12.

**Chart 12**  
Thermal Substitution Rate (%)



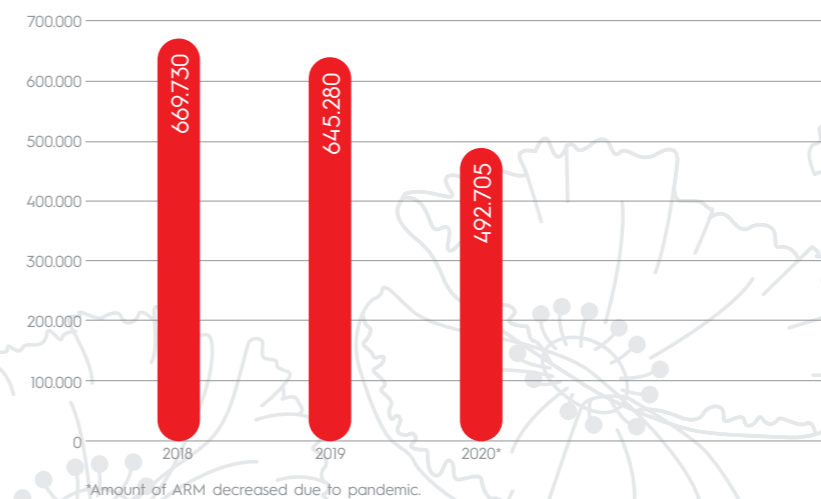
Thermal substitution rate was increased 40% compared with 2019 and 304,387 ton thermal substitution was used in our plants.

**Total 936.101 ton thermal substitution was used in 5 years and 514.800 ton CO<sub>2</sub> reduction was released.**

### Alternative Raw Material (ARM) Usage

We used 492.705 ton ARM in 2020. We reduced the use of natural resources by about 500.000 tons due to ARM. ARM usage distribution is given in Chart 13.

**Chart 13**  
Usage of ARM (ton)



Energy efficiency and modernization works are continuing in our factories together with reduction of GHG.

Heat recovery systems in our factories turn into electricity generation. Our products are also changed into low carbon emissions that we used blast furnace slag and fly ash instead of conventional clinker in our cement. ARM usage into our branches is given in Table 20 and Table 21.



**Table 20**  
**ARM's Distribution into Branches**

Alternative Raw Material	2020 Amount of ARM (ton/year)					
	Aslan Cement	Bolu Cement	Ünye Cement	Mardin Cement	Ankara Cement	Adana Cement
Grit	28.435	44.421	0	0	1.907	0
Drilling Muds	0	0	0	12.600	0	0
Iron Slag	0	0	1.511	0	6.340	17.729
Concrete Waste	8.638	0	0	0	78.823	0
Other	52.422	0	1.390	0	22	75.992
<b>Total</b>	<b>89.495</b>	<b>44.421</b>	<b>2.901</b>	<b>12.600</b>	<b>87.092</b>	<b>93.721</b>

**Table 21**  
**Distribution of By-Products**

By-Product	2020 Amount of By-Product Used (ton/year)					
	Aslan Cement	Bolu Cement	Ünye Cement	Mardin Cement	Ankara Cement	Adana Cement
Granule Blast Furnace Slag	158.164	13.408	3.466	0	40.290	80.894
<b>Total</b>	<b>158.164</b>	<b>13.408</b>	<b>3.466</b>	<b>0</b>	<b>40.290</b>	<b>80.894</b>

**In 2020, the highest thermal substitution rate was 21.29% realized, reaching the highest rate of all time.**

Thermal substitution rate increased to 40% compared to previous year and 304.38 ton TS was used in our factories.

#### Waste Management

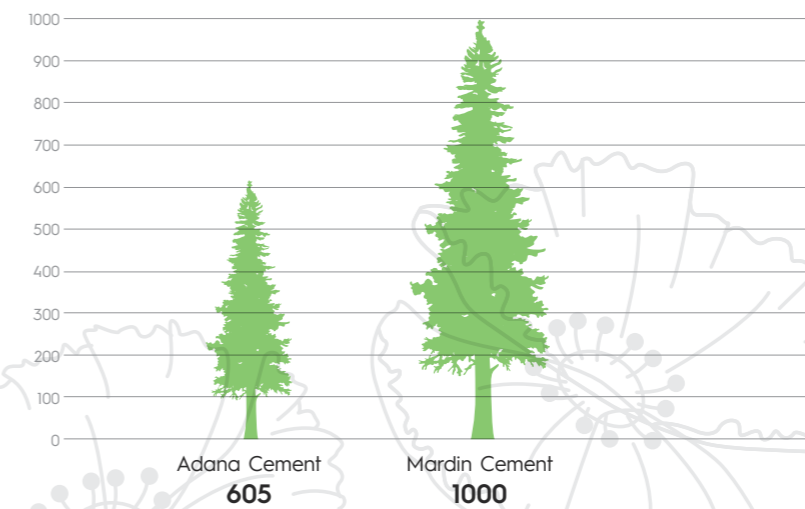
**OYAK Cement under the Zero Waste Project**, managing all wastes according to main principles of zero waste framework in its factories and premises. We started to implement **zero waste** in 2020 in all our locations. We will share outcomes of the project in coming years.

#### Biodiversity

Biodiversity is managed as a sustainability indicator in OYAK Cement.

Biodiversity Policy is monitored with management processes and compliance requirements obligations are implemented. In this context, for our quarry sites, afforestation works are carried out within the framework of recovery plans. Our afforestation works are given in Chart 14.

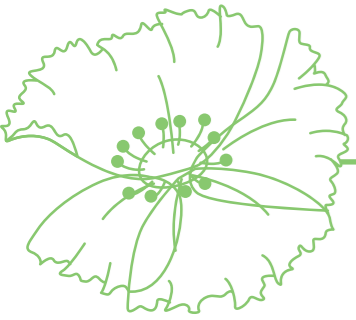
**Chart 14**  
**Distribution of Sapling Planting by Branches (Number)**



In line with the determined annual environmental targets, Adana Cement, seedlings were planted in March and April.

**We have planted 439 trees in 2019 and 605 trees in 2020 in Adana Cement.**

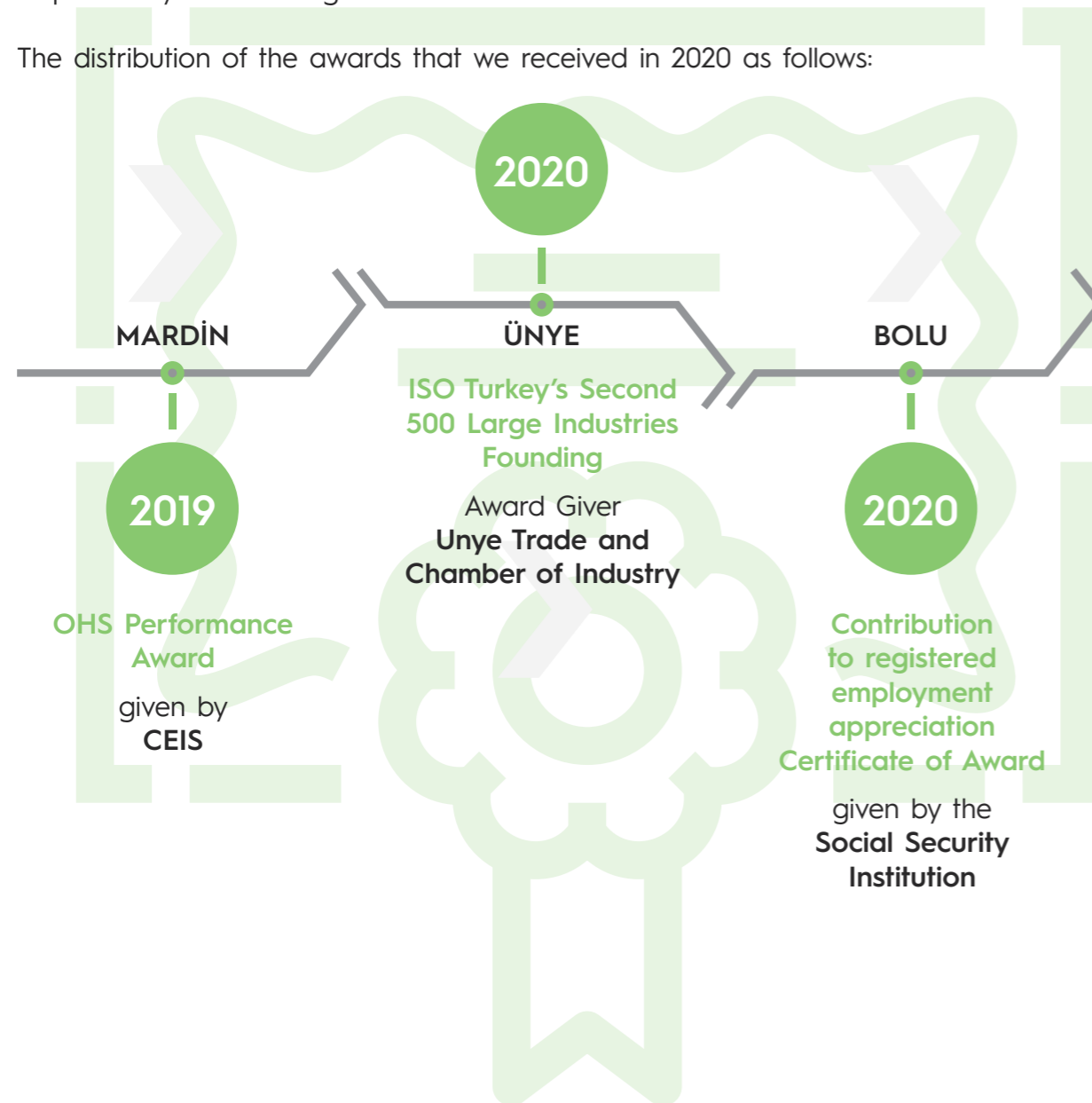
In Mardin Cement, on the National Afforestation Day, for 1.000 days without work accidents, 1.000 saplings event was organized on behalf of the employees and within the scope of that event, 1.000 saplings were planted. It was erected in the Yeşilli district of Mardin in cooperation with the Yeşilli District Governorship.



## 6.2. Social Indicators

Our social indicators are employees, employee engagement, corporate social responsibility and training.

The distribution of the awards that we received in 2020 as follows:



### Employees

Under the equal rights and opportunities OYAK makes evaluation with its employees have a right to replace vacant positions, rotation, promotion or resignation.

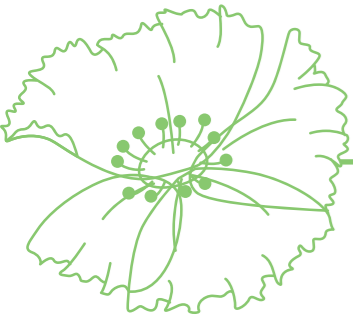
Components of human resources management at OYAK Cement:



Organizational job descriptions, responsibilities and powers of our employees are defined within the organizational structure, according to the duties and responsibilities of our employees who are out of scope, scale determined fees are provided.

Unionized subject to collective bargaining agreement, work groups, positions and duties of our employees as well as wage scales, workers and employers are determined by collective bargaining agreements made by their unions. Wage to our employees apart from private pension (BES) support and insurance, communication and transportation by positions additional opportunities are provided.

The data of employees performance evaluation is shared in Table 22.



**Table 22**  
**Distribution of Performance Evaluation**

Performance Evaluation	2020
Subject to a regular performance and career development evaluation total employees	464
Women	82
Men	382
White collars	464

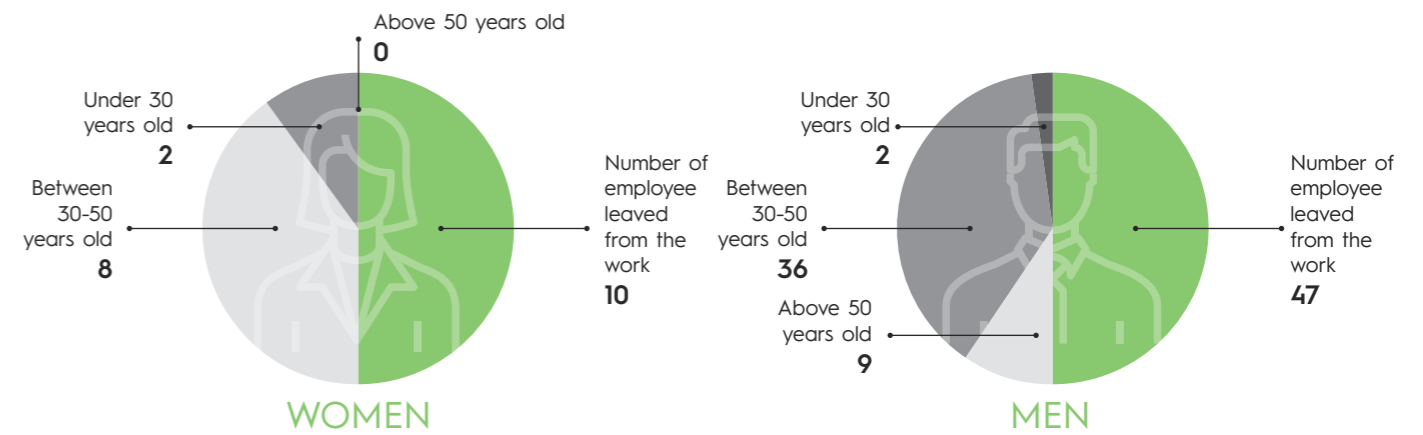
Based on the gender equality agenda, our target is increasing the women employees at the senior management levels in 2022. Gender based distribution of our employees is given in Table 23.

**Table 23**  
**Gender Based Distribution of Our Employees**

Diversity and Equal Rights	2020
Number of employees in senior management levels by the following categories (Mid-level manager and above)	
Women	16
Men	66
Under 30 years old	0
Between 30-50 years old	71
Above 50 years old	11

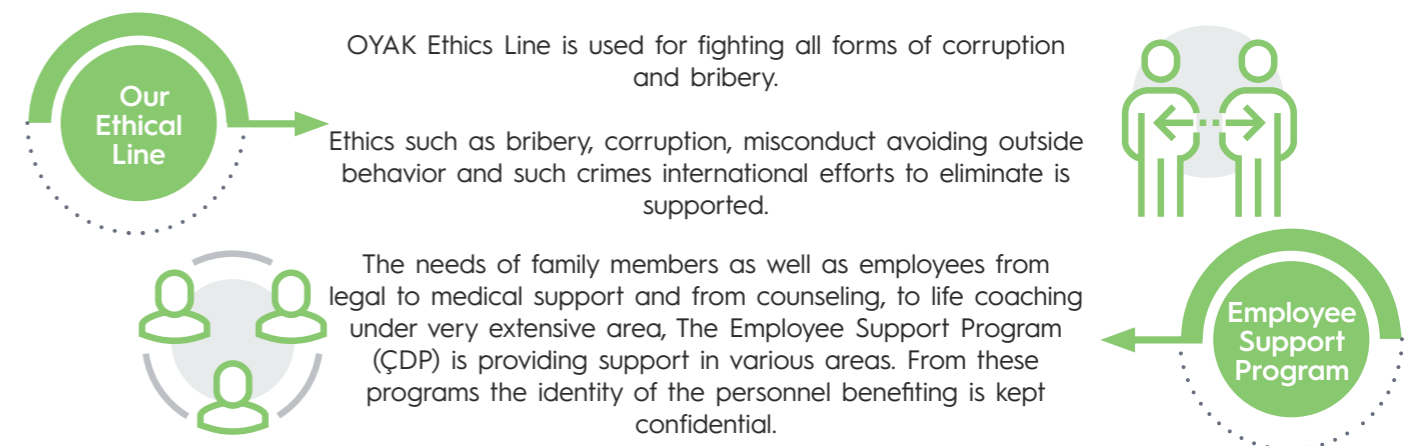
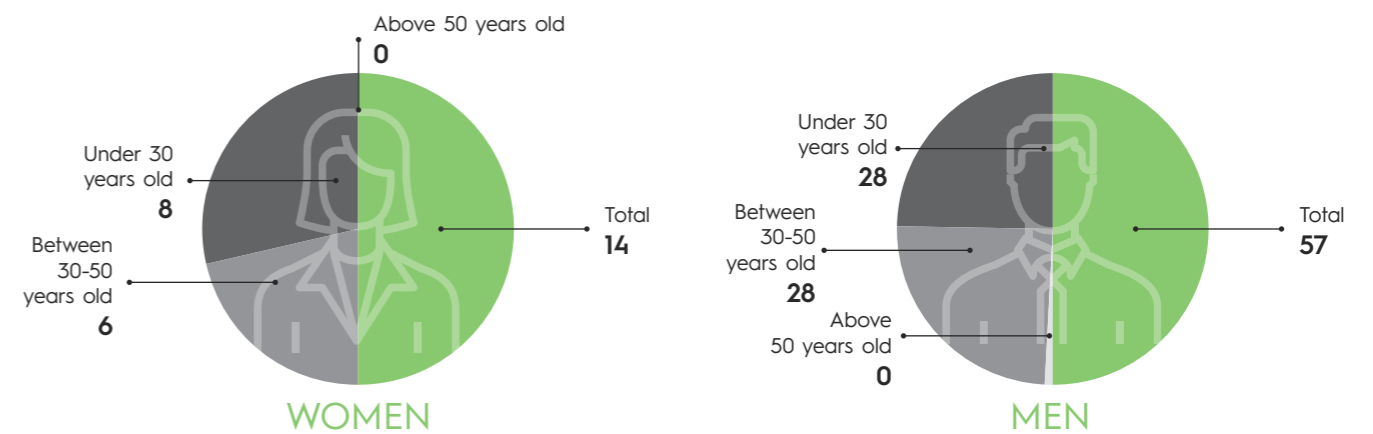
Employee's turnover rate is provided in Chart 15.

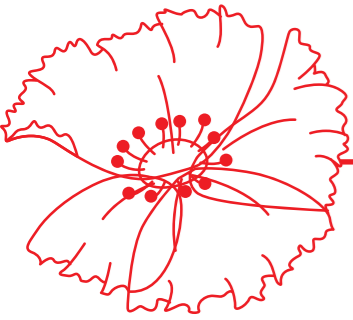
**Chart 15**  
**2020 Employee's Turnover Rates**



The distribution of new employees by gender and age is given in Chart 16.

**Chart 16**  
**Gender Based Distribution for New Beginners**










### What is Ethi.co?


Ethi.co is a 24/7 support line managed by "Remed Assistance", a company that is completely independent from OYAK Cement, where you can share the nonconformities you have identified about corporate business principles and express your concerns.

### Which situations can be reported?


- Failure to comply with company ethical principles
- Forgery of documents
- Conflict of interest
- Bribery and corruption
- Psychological pressure (Mobbing)

- Social media usage contrary to company image
- Unethical and illegal behavior
- Trading of inside information
- Situations that harm the company and brand reputation

You may report the situations that you think are against corporate ethical values and principles, professional standards and regulations and the law, within the "confidentiality principles".




## How can I make a notification?




You may make a notification at [www.cimporethico.com](http://www.cimporethico.com) with your corporate username and password.


**Username:** Cimpor  
**Password:** Cimpor2018




You may call  
**0 (212) 979 70 33**




You may send an email to  
[ethico@cimporethico.com](mailto:ethico@cimporethico.com)




Identity Information Statement Is Not Required For Notifications To The Ethi.co.

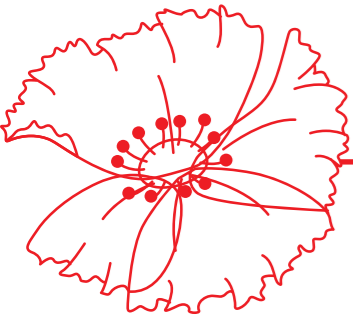


Ethi.co offers Making Notifications 24/7.



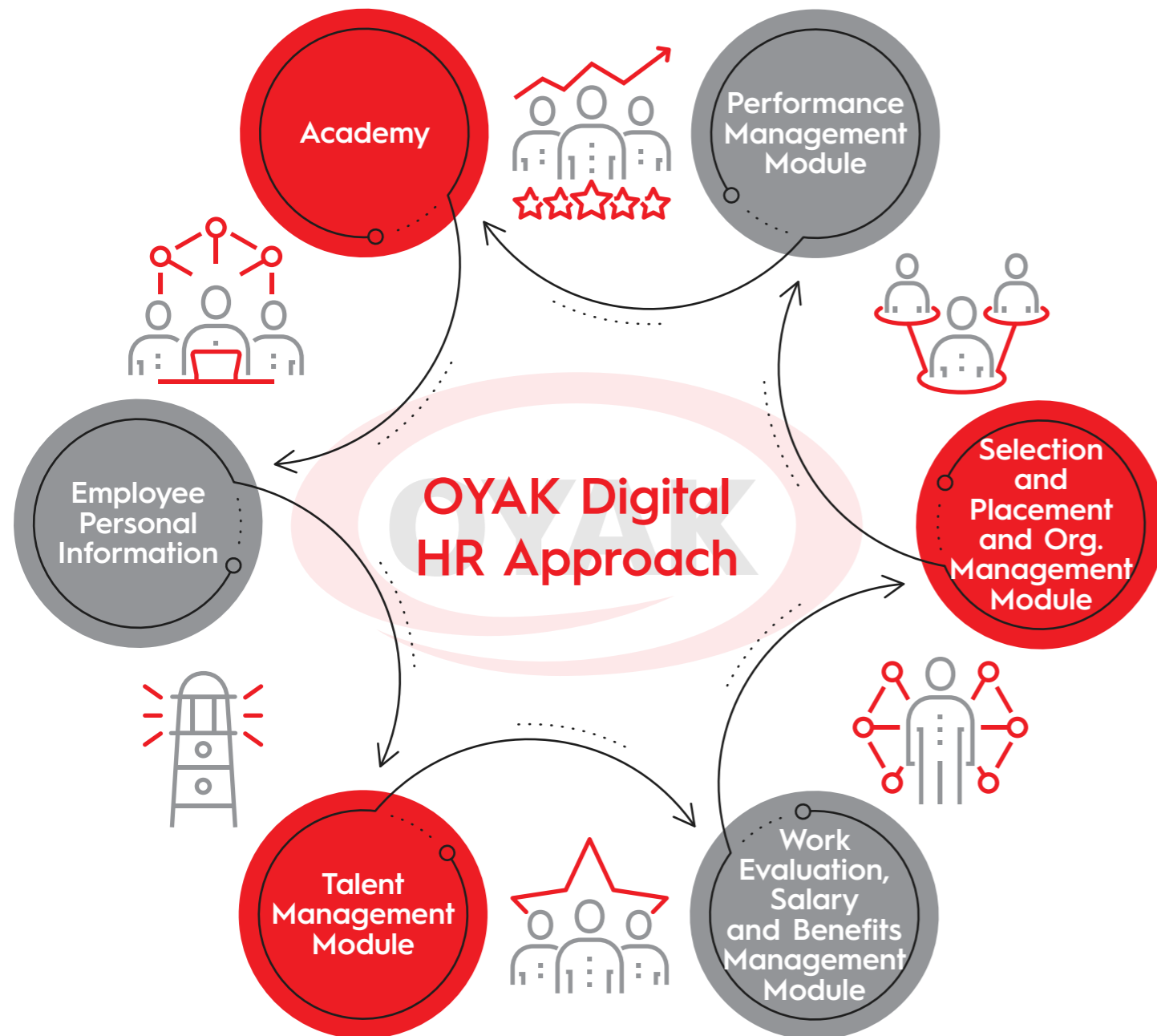
Ethi.co Service is Provided by a Professional Company Completely Independent from Your Institution.





## Digital HR

In the digital HR applications project, in the first phase wage and fringe benefits management, talent management and training processes are put into use. In 2020, the learning development module and talent management module was activated. Open to mobile applications of our employees, the system provides ease of use and spatial freedom.



Increasing the synergy and cooperation between OYAK Group Companies and our common business processes is aimed to be reviewed with the understanding of continuous improvement. Accordingly, in 2018, Human Resources Management, OYAK Group HR Processes Design and Digitization Project has been initiated.

HR processes were digitized with the HR Digital Project. So we provide a more efficient, effective and agile human resources management and decision making system to our employees.

The project's first phase was completed in 2019. Covering more than 30,000 of our employees; completely exclusive to OYAK infrastructure has been created. This project was commissioned in July 2019 and prepared with the OYAK human resources and information systems workforce.

Thus, OYAK Human Resources processes and career journeys, OYAK Digital HR became traceable.

Accessing basic HR processes for our employees with its web interface and mobile application with the OYAK Digital HR platform provided;

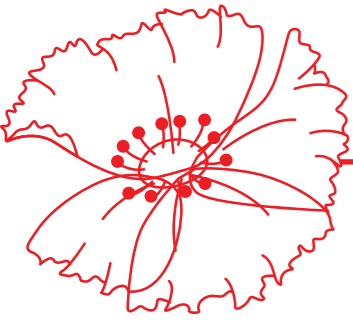
- Personnel information,
- Salary,
- Performance management,
- Selection and placement,
- Entry, exit, transfer, promotion and leave

processes is approved and monitored.

In 2019, compensation and benefits management, talent management and educational development processes can be managed through the system. All web interface, tablet and mobile applications were put into use to reach our employees.

Thus, in order to ensure organizational continuity, our employees' potential common of all our processes that will be discovered and supported by their development and progress.

The learning and development module was put into practice in 2020. Our employees get benefits from unlimited access to rich development contents as well as personal development programs. Talent management module subsequently implemented. Our employees choose different departments as a career. Thus, they can share their goals through Digital HR.



Simultaneous follow-up of dynamic development and demands by the employee - HR - manager structure has been reached.

At the same time, competency and potential evaluations through the talent management module can be done.

With the Wage and Benefits module, all of our employees' wages, fringe benefits and wage increase/premium information can be seen.

In Table 24, our employees who entered into a collective bargaining agreement are shared. The percentage of employees entering the contract was 63.5%.



**Table 24**  
**Employee Distribution Under The Collective Bargaining**

Collective Bargaining Agreement	2020
Proportion of employees covered by collective bargaining agreement (%)	63,50
Total number of employees under TIS	847
Total number of blue collar employees under TIS	847

Uninsured, under the age of 18 and/or permit the employment of unsuitable personnel is not done.

All required OHS personal protection equipment is provided to all employees.

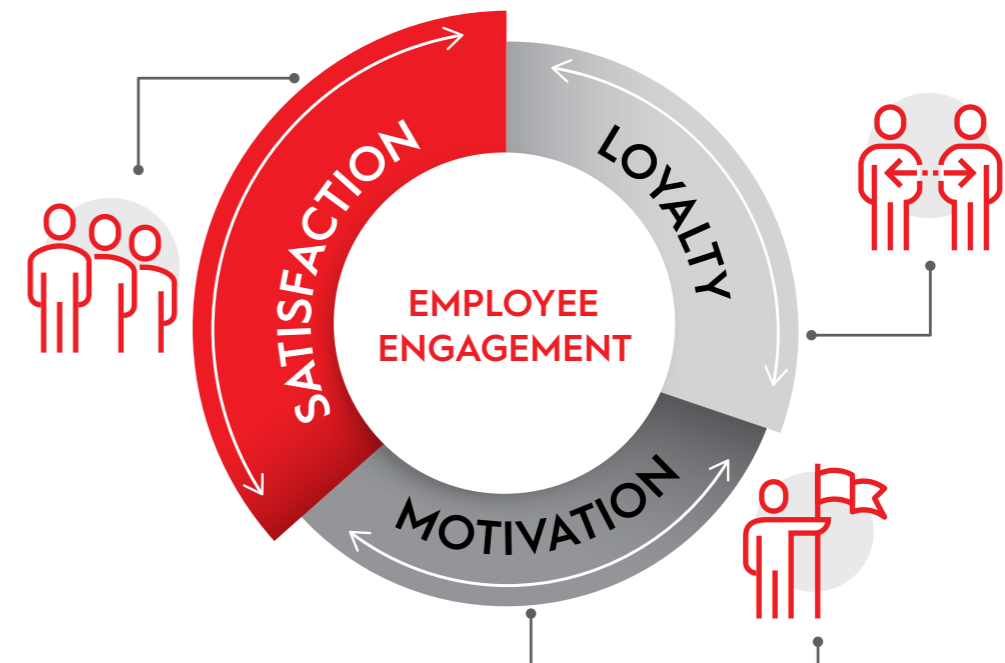
The health status of the employees is in addition to the annual periodic controls are followed through regular examinations and heart health, obesity and fighting, promoting healthy living through anti-smoking campaigns is being done.

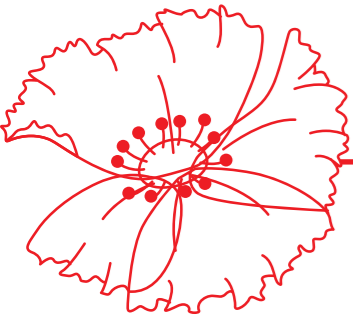
Employee's data under the "Personal Data Protection Law" is processed in accordance with the confidentiality of private life. Language, religion, ethnicity, in any way in the management and decision processes of the company origin, gender, etc. no distinction is made. It is based on performance and efficiency criteria in all processes and is transparent policies are followed.



### Employee Engagement

Determining the satisfaction, commitment and motivation levels of its employees and a survey on employee engagement is done every two years.





Dynamically, simultaneous follow-up of the development and demands by the employee - HR - manager structure has been reached.

At the same time, competence and potential through the talent management module evaluations can be made.

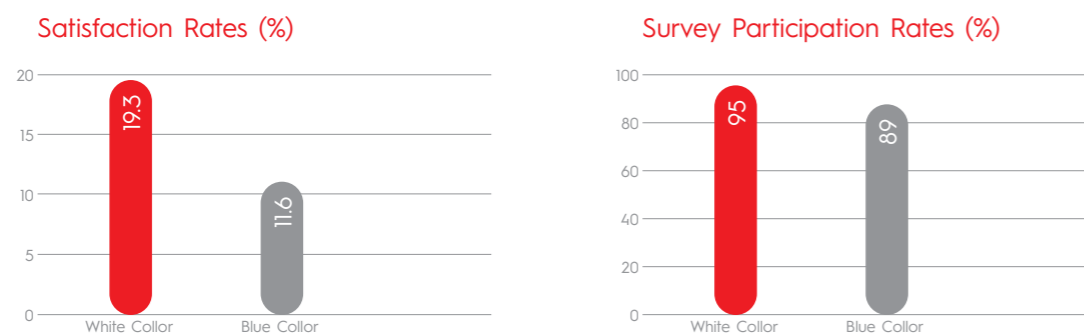
With the Wage and Benefits module, all our employees receive information about their wages, benefits and wage increase/benefits. They can see their premium letters online.



Compared to 2017, the satisfaction increase rate was 19.3% among white-collar employees. The increase in blue-collar employees was 11.6%.

The rate of participation in the surveys is 95% for white-collar employees and 89% for blue-collar employees. The increase in satisfaction and survey participation rates are shared in Chart 17.

**Chart 17**  
**The Increase in Satisfaction and Survey Participation Rates**



### Career planning, talent management and/or lifelong learning programs

Career planning, talent management and/or lifelong learning programs to increase the visibility of our human resources at different management levels, to discover the existing potential of our employees and to find suitable positions are implemented.

In 2020, talent management started to be operated through Digital HR, working on an annual basis information, career expectations, demands, interests are collected. Executive reviews are completed on an employee basis and the process is completed with title-based planned calibration sessions. With the process outputs, individual development plans are prepared and the career planning is evaluated annually. According to employee-based assessments, training and development activities are organized through Digital HR.

### Employee compensation system and fringe benefits

At OYAK Cement, wages; with the aim of being a reliable and preferred employer fair and just remuneration, including the improvement of employee living standards planned as a policy. By determining the corporate value created, the total income package of the employees is formed. The country's economic indicators, financial results and developments in the labor market will be taken within the scope of remuneration.

### Employee goals



Providing online learning tools for employees



Digitalization of talent management system transport and operation



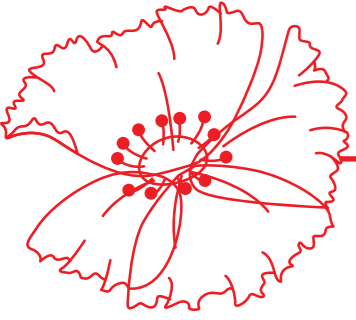
Within the scope of the HR approach that touches the employee, a minimum of two meetings with employees per year to be done

Establishing the phenomenon of internal trainer and implementation



Adaptation for new employees standard orientation flow that will increase commissioning





## Young OYAK Employees Recruitment Program

OYAK Cement, we can grow by incorporating young talents into our group.

Our goal with this project is,

- Compliance with OYAK culture,
- Gaining a global perspective,
- To create a qualified workforce that creates dynamism with a new generation perspective,
- To be a global player in its sector,
- To ensure sustainable success,
- Making their teams much stronger,
- To create a common development opportunity for existing and new employees.

Candidates are determined by the selection processes created specifically for the program.

Candidates get to know OYAK Cement and adapt quickly and have experienced their duties. It is ensured by special orientation programs.

Candidates participate in the competency-oriented development process that will take place during the specified period. They get involved with programs such as customized training, mentoring, and management meetings.



## Corporate Social Responsibility

8.000 Ramadan parcels were distributed to those in need across Turkey. At the beginning of the pandemic, medical masks were provided to our employees' families.

OYAK Cement were made all necessary actions and re organizing its premises according to social distancing, hygiene and management of personal protective equipment due to Covid 19 epidemic.

Special mugs and glasses were prepared for all employees combined with World Environment Day and outcomes of this implementation was creating awareness about the Zero Waste Project that was implemented just started.

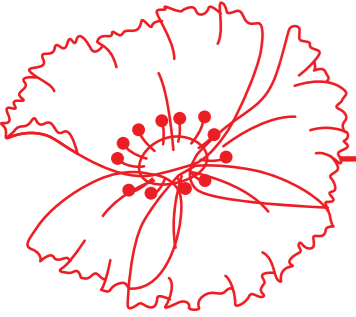
### Preparations and Implementations within the Covid 19 Outbreak

Covid 19 epidemic caused implementation and additional changes and procedures about the living and hygiene conditions in the cafeterias that physical and seating structures and service time scheduled are changed based on social distance and hygiene conditions.

In the cafeterias, visual and printed information about the prevention and measures of the Covid 19 epidemic information notes have been prepared. By hanging information posters at the entrances of the cafeteria and on the sinks, The staff kept up-to-date TV in dining halls by constantly informing about the Covid 19 epidemic and measures from the systems, contributed to the creation of awareness. Health screenings of personnel in critical missions continued.

Awareness activities with posters continued throughout 2020.





In line with the objectives determined due to the rapid spread of the epidemic all over the world, under the title of "Coronavirus Developments" the content of Internal Communication platform "Mısınız" has been opened. All news and information related to the Covid 19 outbreak through this channel transfer to employees via mobile and PC. Pandemic, prevention and protective informative posts about the measures (videos, news, new developments, preventive measures etc.) continue to be carried out through this platform. We provided all required information to our employees to fight against Covid 19 in their working and social life. Within the scope of the project, it is possible to share the rules and measures to be followed quickly and effectively. Testing our employees in order to eliminate the risk of contamination is also a protection are among our measures.

### Isolation and Isolation Rooms

From an infected patient found to be showing Covid 19 symptoms, to other prevent the spread of the disease to workers, to isolate the infected person until medical teams arrive, Isolation Rooms have been established in all our factories in order to protect other employees.

### Mask and Face Shield Assistance to Health Institutions

Masks and face shields were provided to health institutions in the regions where we operate.



#### Mask and Visor

- Adana
- Bolu
- Ereğli
- Ankara
- Kocaeli
- Mardin
- Ordu/Ünye
- Denizli
- Osmaniye
- İstanbul
- Manisa
- Hatay
- Samsun
- Rize
- Afyon
- İzmir
- Aydın

Total Mask  
130.000 Piece

Total Visor  
2.000 Piece



## Corporate Social Responsibility

### Trainings

At OYAK Cement, trainings have an important place in increasing competencies.



#### Vocational Technical Training

Increasing the qualifications of employees, access to up-to-date technology, and training are performed accordingly.



#### Personal Development Trainings

Focusing on employee competence development behavioral trainings (Communication, Negotiation, Emotional Intelligence, Negotiation).



#### Leadership Trainings

Trainings are organized employees in the talent group (Leadership Academy 4.0)



#### Management Trainings

Training is organized for a target group of managers to update information (Leadership Development Program).



#### Vocational Qualification Trainings

In dangerous and very dangerous workplaces, employees who do not have work-related vocational training oriented trainings.



#### Occupational Health and Safety and Environment Training

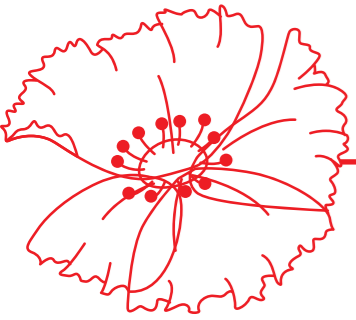
Compliance requirement as well as risk and hazardous based training programs.



#### Legal Compliance Training

Competence development and compliance requirement based training such as fighting Covid 19 epidemic, operational and management systems training is evaluated under this scope.

Our training programs were done on digital platforms due to the Covid 19 epidemic in 2020 and training programs gender based distribution is given in Table 25 and Covid 19 training is given in Table 26.



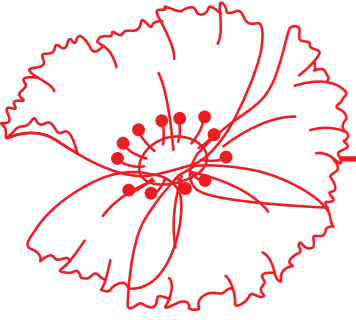
**Table 25**  
**Training Hours**

Training Hours	2020	2021 Target	2022 Target
Average annual training hours per employee (person/hour)	32,0 person/hour	36,8	40,4
Average annual training per women	38,90 person/hour	43,7	45,8
Average annual training per men	21,36 person/hour	29,9	35,8
Average annual training hours per white collar employee	41,90 person/hour	48,1	53,0
Average annual training hours per blue collar employee	26,20 person/hour	30,1	33,1

**Table 26**  
**Trainings Organized in the Scope of Covid 19**

Training	Training Hours
Deloitte, Impacts of New Coronaviruses into the Cement Sector	13,5
Shopping During the Coronavirus	55,9
Suggestions During the Coronavirus Epidemic at Home	38,7
Eating Healthy During the Coronavirus Pandemic	44,6
Providing Home Hygiene Against Coronavirus	16,0
Explaining the Coronavirus to Children	59,7
Psychological Effects of Coronavirus	54,9
O.M. Our Heath During the Corinavirus	42,5
Ö.D. Economy After the Epidemic	12,0
New Coronavirus Impact into the Cement Industry	9,0
New Coronavirus Awareness Program	326,3
Corona (Covid 19), General Cleaning and Hygiene Rules, Protection Methods, Use of PPE	72,0
Covid 19 Symptoms Symptom Findings	3,5
Covid 19 Symptoms Symptom Findings Before Arriving at the Workplace In Sickness and	7,5
What to Do in Suspicion of Covid 19	
Covid 19 Back to Work Training	108,0
Covid 19 Emergency Action Plan and Covid 19 Precautions	10,0
Covid 19 Period Education Package	2,1
Where Are We Going Towards The Covid 19 Epidemic Process? webinar	130,5
Return to Work OHS Training (Back to Work After Covid)	72,0
Return to Work OHS Training (Back to Work After Covid Contact Quarantine)	36,0
Covid 19 Prevention Training in the Workplace	2,1
Aras Bilgen Effective and Happy Working from Home	3,0
Cem Kozlu Leader's Tool Bag During the Pandemic Period	10,5
Bekir Ağır Post-Epidemic Companies, Brands and Social Dynamics	9,0
Ethem Kocabaş I Discover My Child During the Pandemic Period Training	6,0
New Medical Mask Use	29,3
Remote Work Training	81,2
Recommendations for Breathing Exercises	61,0
Covid 19 Measures at Work	354,0
<b>Total</b>	<b>1.670,9</b>





## Occupational Health and Safety (OHS)

OHS is one of the priority areas at OYAK Cement and is managed with the business processes supported with risks and opportunities. Our target is to prevent accidents in advance and create a safe working environment with occupational health and safety management systems.

At the OHS Training Center located in Aslan Cement facility and transferred to ÇEİS for the benefit of the whole sector with the training programs carried out, our employees receive practical training.

OHS trainings was given digital platforms due to the Covid 19 epidemic. Trainings were given on the company's e-platform (Dijital İK) was ensured that the employees were taken by creating special conditions.

OHS Training	2020
OHS Training (person/hour)	22,94 (person/hour)
OHS trainings in total training hours rate	75%



Our OHS indicators for 2020 are given in Table 27.

**Table 27**  
**OHS Performance Indicators**

OYAK Cement Factories Accidents	
OHS Indicators	Total (Oyak and Contractors)
Number of loss time accident	39
Number of accidents involving death	0
Occupational illness diagnosis	0
Number of work day loss	1.308
Number of near miss	88
Loss time injury frequency ratio	7,62
Loss time injury severity ratio	0,25

**Zero accident target was realized in Mardin Cement in 2020.** Because of 1000 days without any accidents in Mardin Cement, sapling to 1000 trees for employees.

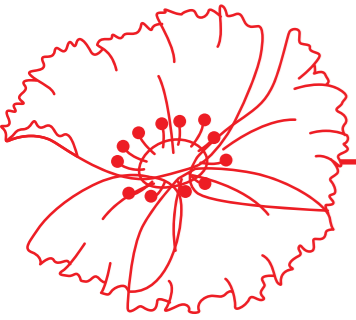
OYAK Cement and its sub contractors implemented OHS Management System that;

- Risk notification,
- Near miss notifications,
- Job request/ Corrective-preventive action closing ratio,
- Behavioral safety visit,
- Workspace non-compliance audits,

are monitored and maintained. In this context, in 2020;

- **6.000** risk statements, made.
- All together **5.500** risk notifications including previous year, have successfully closed and all required actions were taken.
- Corrective-preventive action closing ratio: **%99**
- In 2020, a total of 1,010 behavioral safety visit and workplace non-compliance audits have been carried out.





### Daily OHS Toolbox Talks

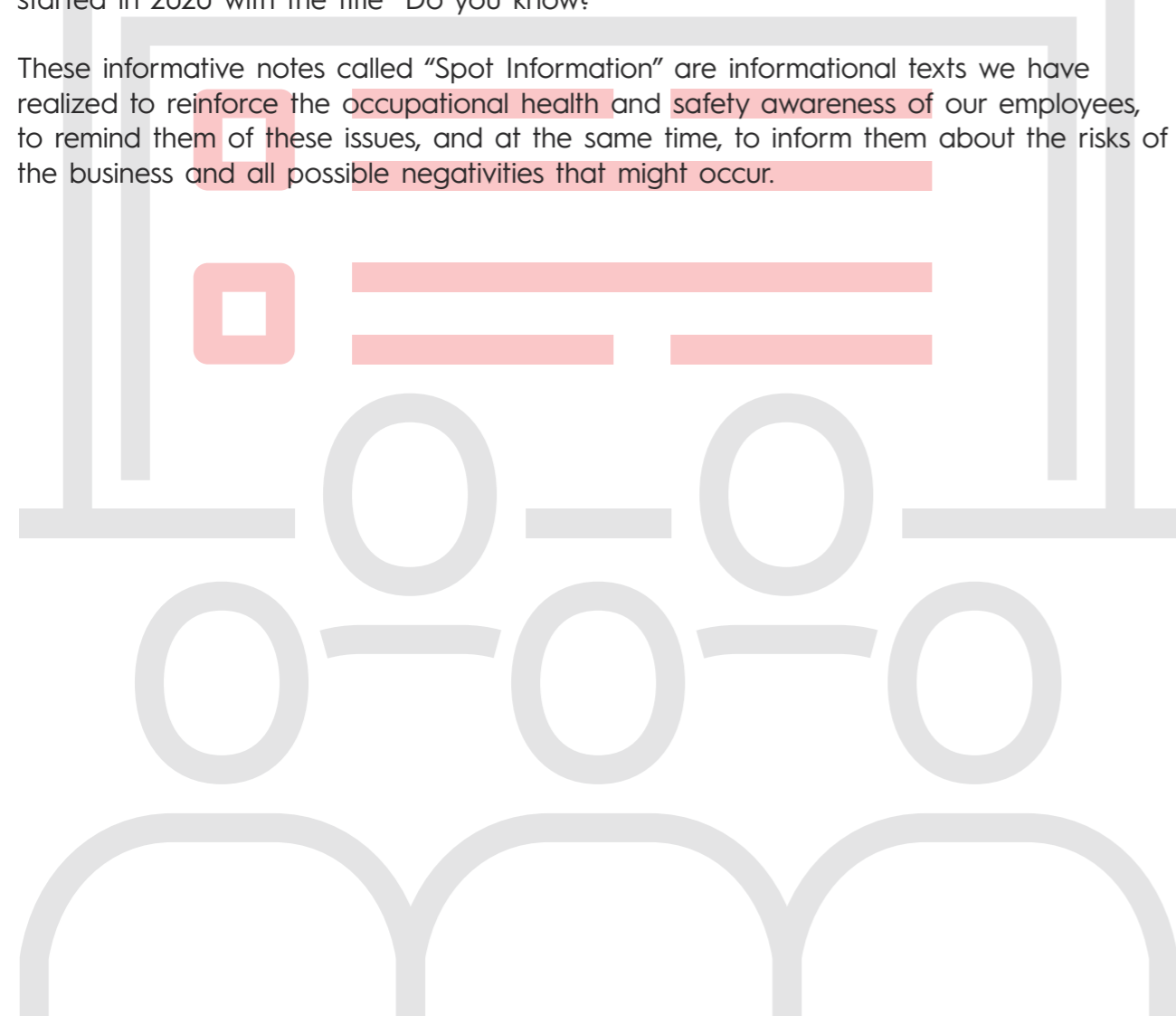
Reducing OHS accidents, for new beginners have to participate in our OHS induction and orientation training program as well as factory toolbox talks programs are given to employees in order to create awareness about the work environment. Compliance requirements of the OHS training program are also provided to employees together with training notes.

With the application that started as of 2020, daily on-the-job OHS conversations with the "MISIN" platform, it is aimed to reach all employees.

### OHS and Environment Spot Information

In order to instil occupational health and safety and environmental awareness and to maintain our awareness at the highest level every day we digitally shared with our all employees brief pieces of information that we thought were important and necessary for our health and safety through our internal communication platform (Are You) we started in 2020 with the title "Do you know?"

These informative notes called "Spot Information" are informational texts we have realized to reinforce the occupational health and safety awareness of our employees, to remind them of these issues, and at the same time, to inform them about the risks of the business and all possible negativities that might occur.





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