



VANJSKOTRGOVINSKA KOMORA BOSNE I HERCEGOVINE
СПОЉНОТРГОВИНСКА КОМОРА БОСНЕ И ХЕРЦЕГОВИНЕ
FOREIGN TRADE CHAMBER OF BOSNIA AND HERZEGOVINA

TRILATERAL BUSSINESS FORUM

BOSNIA AND HERZEGOVINA – SERBIA – TURKEY

METAL INDUSTRY

Sarajevo, 20.10.2015.





METAL INDUSTRY OF BOSNIA AND HERZEGOVINA

- On average makes about 20,3% of total exports of B&H
- ¼ of the total production of B&H
- Positive trade balance in most of its segments
- Low value-added products → Low participation in GDP (from cc.4%)
- The key production chains are: automotive parts, aluminum joinery and construction elements
- Skilled and experienced workforce, favorable labor cost (200 € for the unskilled, and € 770 for the highly skilled) In 2014 total number employess in metal sector was 23.069
- The most common export markets are the countries of the Western Balkans, Germany, Italy, Austria and Scandinavia





METAL INDUSTRY OF SERBIA

- About 31,000 employees work for 2,000 companies
- The share of the sector's employees in the total number of employees in Serbia is 2.4%, and the share of companies in their total number in Serbia is 3.5%
- The share of this industry in the total physical volume of industrial production in 2014 was 4%.
- The share of this part in GDP in 2013 was 1.4%
- Physical production volume of metal products in 2014 was lower by 24.7% as compared with 2013. Increase in production was recorded only in: steam boilers (272%), metal structures and blades, whereas decline was recorded with other products.
- The most common export markets are Russian Federation, Germany and Bosnia and Herzegovina





METAL INDUSTRY OF TURKEY

- The industry enjoyed high growth rates until the global recession in 2009. However, the industry recovered spectacularly and demonstrated a growth rate of 29.7% between the years 2010 and 2012. .
- Total export of Metal sector in 2014 was 49.3 bilion €
- According to the Ministry of Science, Industry and Technology, the machinery industry utilizes approximately 85% domestic input in the production stage, which in turn, reduces its dependency on foreign suppliers.
- Turkey's proportion in global automotive production has risen from 0.53% in 1999 to 1.24% in 2012, which ranked Turkey 17th in the global automotive manufacturing arena with over 1 million units produced. The most common export markets are United Kingdom, Germany, France, Italy





METAL INDUSTRY
Export by countries 2014 (in 000 EUR)

TB	Description	Bosnia and Herzegovina	Serbia	Turkey
72	Iron and Steel	291.804	404.035	6.966.802
73	Articles of iron and steel	190.408	320.451	4.787.568
74	Copper and copper products	34.078	300.987	1.074.356
75	Nickel and articles thereof	10	1.296	11.276
76	Aluminium and aluminum products	292.488	308.057	1.917.756
78	Lead and articles thereof	3.027	851	11.667
79	Zinc and articles thereof	9.680	2.185	15.559
80	Tin and articles thereof	996	74	830
81	Other base metals; cermets articles thereof	17	4.980	10.164
82	Tools, tanners, spoons and forks, of p	11.589	20.828	201.582
83	Miscellaneous articles of base metal	30.404	41.401	703.921
84	Nuclear reactors, boilers, machinery and mechanical hours	299.904	731.889	10.230.614
85	Electrical machinery and equipment and parts thereof; apa	174.715	1.044.771	7.296.066
86	Rolling stock and parts thereof; railway and tr	1.220	29.768	113.126
87	Vehicles other than railway or tramway rolling	150.888	1.552.731	13.590.598
88	Aircraft, spacecraft, and parts thereof	552	4.074	448.302
89	Ships, boats and floating structures	262	17.933	955.453
90	Optical, photographic, cinematographic, measuring, con	7.803	87.191	538.931
91	Clocks and watches and parts thereof	834	4.630	28.038
92	Musical instruments, parts and accessories of these producers	156	1.157	7.690
93	Arms and ammunition; parts and accessories thereof	46.989	49.483	385.716
TOTAL:		1.547.824	4.928.772	49.296.015





METAL INDUSTRY
Import by countries 2014 (in 000 EUR)

HS code	Description	Bosnia and Herzegovina	Serbia	Turkey
'72	Iron and steel	191.872	418.525	13.245.116
'73	Articles of iron or steel	261.559	319.709	1.969.157
'74	Copper and articles thereof	66.502	170.971	2.686.124
'75	Nickel and articles thereof	851	2.103	141.507
'76	Aluminium and articles thereof	120.371	300.775	2.633.052
'78	Lead and articles thereof	817	4.530	187.599
'79	Zinc and articles thereof	9.325	13.138	454.269
'80	Tin and articles thereof	3.677	8.090	47.614
'81	Other base metals, cermets, articles thereof	2.095	8.712	100.799
'82	Tools, implements, cutlery, etc of base metal	35.152	46.844	640.778
'83	Miscellaneous articles of base metal	72.417	70.957	680.115
'84	Machinery, nuclear reactors, boilers, etc	707.802	1.206.382	21.142.640
'85	Electrical, electronic equipment	485.559	971.606	13.504.069
'86	Railway, tramway locomotives, rolling stock, equipment	9.037	51.161	457.244
'87	Vehicles other than railway, tramway	519.815	1.647.794	11.838.229
'88	Aircraft, spacecraft, and parts thereof	463	8.625	2.273.598
'89	Ships, boats and other floating structures	457	7.786	340.538
'90	Optical, photo, technical, medical, etc apparatus	93.283	208.431	3.670.099
'91	Clocks and watches and parts thereof	4.001	11.482	252.616
'92	Musical instruments, parts and accessories	1.181	3.447	25.449
'93	Arms and ammunition, parts and accessories thereof	3.230	2.188	122.927
TOTAL		2.589.466	5.483.256	76.413.539





CHANCES FOR COOPERATION

The potentials and chances for cooperation, in terms of exports to these markets or to the third-common export markets are:

- **Automotive industry**
- **Metal constructions and elements for engineering and building industry**
- **Aluminum joinery**
- **Defense industry**





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Thank you for your attention!

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