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## JOINT STATEMENT OF THE CHAIRMAN AND THE CEO

*The Eczacıbaşı Group has taken numerous measures in recent years to prepare for greater uncertainty.*

The Eczacıbaşı Group has taken numerous measures in recent years to prepare for greater uncertainty. We have strengthened our governance and diversified our revenue sources. We have shored up our financial structure and invested in new technologies, new business models and innovations. The digital transformation program we launched in 2018 is enhancing our ability to provide fast, effective and innovative solutions to customers and business

partners, and our innovation and entrepreneurship program is developing initiatives that will drive our future growth.

Looking back through the lens of the Covid-19 pandemic, these preparations not only served us well in the challenging environment of 2019 but also helped us to adjust quickly and successfully to the unfamiliar and fast evolving conditions of early 2020.

In 2019, several years of rising protectionism brought global trade growth to a standstill for the first time in a decade. As global growth dipped, governments scrambled to revitalize their economies.

In Turkey, concerns about possible interest rate hikes in the US, regional tensions, and the strains of two consecutive election years put further pressure on our economy, which contracted by 1.9 percent in the first half of the year. In the second half, an effective mix of fiscal and monetary policy revived investor and consumer confidence, cut inflation by almost half, and raised growth to six percent in the last quarter, resulting in positive, if low, GDP growth for the year as a whole.

In this difficult business environment, the Eczacıbaşı Group increased its net sales by 14 percent to TL 9.5 billion and maintained its profitability. International sales remained steady at €840 million, despite slower growth in all our main markets, largely thanks to an increase in our international sales of building products.

In Turkey, our building products business faced the sharpest fall in demand in almost two decades. New construction permits for buildings and housing units dropped by 48 and 54 percent respectively, returning this industry to early 2000 levels.

In coordination with our international building operations, we countered this contraction by strengthening our market position in Germany, where we are now the second largest supplier of ceramic tiles and the third largest supplier of ceramic sanitaryware and bathroom furniture, and in France and the UK, where we now place second and third in ceramic sanitaryware. We also expanded our presence in India, one of our new strategic markets for ceramic sanitaryware.

Even during this temporary downturn, we continued to prepare for the future by opening a new plant at our Bozüyük production complex that greatly advanced our use of automation and smart technologies and raised our

*In 2019, the Eczacıbaşı Group increased its net sales by 14 percent to TL 9.5 billion and maintained its profitability. International sales remained steady despite slower growth in all our markets.*

ceramic sanitaryware capacity in Turkey by 1.1 million units.

Our healthcare business continued to improve its performance in 2019, with sales up 32 percent relative to the previous year. Last year, Eczacıbaşı Pharmaceuticals Marketing signed a strategic partnership with Novartis that gives us exclusive marketing and sales rights in Turkey for three important oncology and hematology products in Turkey.

Eczacıbaşı-Monrol Nuclear Products, our radiopharmaceuticals developer and producer, signed an agreement with Telix Pharmaceuticals to produce an innovative product for imaging renal cell carcinoma with PET. Both of our healthcare companies also launched new products of their own in 2019.

Our consumer products business achieved strong growth in Turkey in 2019, while pursuing a new



road map for internationalizing its operations. Last year, Eczacıbaşı Consumer Products continued to make progress on expanding its international sales with the opening of a local marketing operation in Morocco and growing exports to the United States, Israel and other new markets. In Turkey, we leveraged our position as one of the top three fast-moving consumer goods companies in the market to increase the distribution coverage and channel mix of our own brands. We also launched new subcategories of our diamond baby care and tissue paper brands. Our goal is to accelerate the development of innovative products for these brands at our new R&D center, which made 12 patent applications in its first year of operation.

Esan, our natural resources business, was tested by falling global demand for industrial minerals and metals and low commodity prices in 2019. All the same, we continued to invest in new resources, including a location adjacent to our Balya lead and zinc mine that will substantially extend the life of that operation. We also searched for new investment opportunities in Central Asia, primarily in Kazakhstan and Uzbekistan. We are pleased that our natural resources business continued to be recognized in 2019 for its investments in

***The Eczacıbaşı Group's mission has acquired new meaning in 2020 with the Covid-19 pandemic. We feel that our history in healthcare and hygiene, which emerged during a time of conflict and scarcity in Turkey, gives us a special responsibility to our stakeholders and society at this time.***

occupational health and safety and for new production technologies that reduce its impact on the environment.

Outside of our core business fields, the most important development in 2019 was our exit from the welding electrode industry. Last year, we transferred our 50 percent shareholding in Eczacıbaşı-Lincoln Electric Askaynak to our longtime partner, Lincoln Electric, in order to focus on our core businesses. As a result, we now have only two businesses outside of our core fields: Kanyon, our joint venture with İş REIT in the property management business, and E-Kart Electronic Card Systems, our joint venture with Giesecke&Devrient and the leader in Turkey of smart card based digital security systems. Both succeeded in overcoming difficulties in their markets in 2019.

Last year we continued to make progress towards our sustainability targets in the area of occupational health and safety, equal opportunity and disposed waste. We also joined the first group of companies in Turkey taking part in a new initiative to combat plastic waste and pollution launched by Global Compact Turkey, the Business Council for Sustainable Development-Turkey (SKD), and the Turkish Industry and Business Association (TÜSİAD).

Our contributions to society are as important to us as our achievements in business. As a business group dedicated to providing the products and services people need for healthy, high quality lives, it is no coincidence that our first official social responsibility initiative was an award program for medical

research. In 2019, we celebrated the 60<sup>th</sup> anniversary of the Dr. Nejat F. Eczacıbaşı Medical Awards to recognize, support, and reward high-caliber medical research. Since then, we have presented 34 Medical Science Awards, 43 Medical Incentive Awards, 17 Medical Students Project Awards and 178 Medical Research Awards for research projects in Turkey.

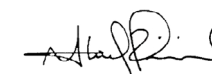
The Eczacıbaşı Group's mission has acquired new meaning in 2020 with the Covid-19 pandemic. We feel that our history in healthcare and hygiene, which emerged during a time of conflict and scarcity in Turkey, gives us a special responsibility to our stakeholders and society at this time.

From the pandemic's onset we sought to ensure that our communities and health workers had the products they needed to prevent the disease from spreading, but without sacrificing the health of any member of our Group. We created a TL 10 million budget for providing donations in cash and kind to local and national health institutions and initiatives. We kept our plants running and producing essential hygiene and health products. And we put in place the highest level of precautions to ensure the safety and health of every employee working from home or in the production plant.

Thus far, we believe we have succeeded in fulfilling our special responsibility to our stakeholders and society, and in this regard, we would like to thank every member of the Eczacıbaşı Group for their commitment and tremendous work during this time. In particular, we would like to recognize the huge contribution of our employees on the production lines and the exceptional effort and selfless dedication of our health team, which oversaw our Covid-19 response and ensured that every Eczacıbaşı Group employee had 24/7 access to medical advice and, if necessary, treatment and hospitalization.

Without a doubt, major challenges await us in the second half of 2020. Not only must we prepare for subsequent pandemic waves but also for their economic and social consequences. The Eczacıbaşı Group was founded at a time of great uncertainty with the mission to contribute to a healthier world. For almost eight decades, this mission has sustained us through many difficult periods. We are confident, therefore, that we can respond to the challenges ahead with new contributions to the health and future of our world.

**Atalay M. Gümrah**  
**CEO**



**Bülent Eczacıbaşı**  
**Chairman**





# Eczacıbaşı at a Glance

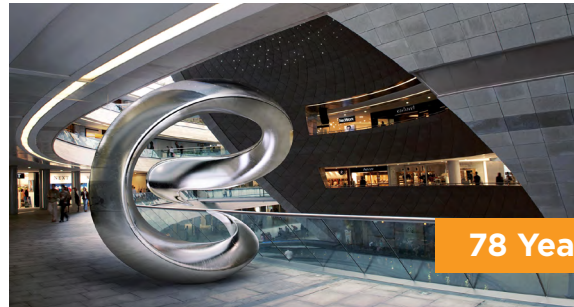
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# WHO WE ARE



**78 Years in Business**

In 1942, the founder of the Eczacıbaşı Group, Dr. Nejat F. Eczacıbaşı, established a small venture to produce vitamins that 10 years later became Turkey's first modern pharmaceutical plant. From the start, our mission has been to invest in fields that improve the health and quality of life of our customers and communities.



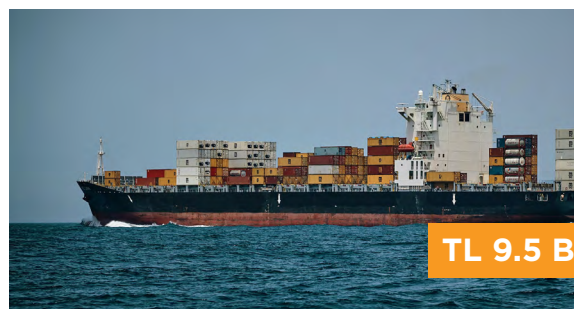
**+11,300 Employees**

We are a group of young, well-educated and talented people with shared values and a deep commitment to providing the very best quality to our customers in a sustainable way. We are also proud to take part in the Group's initiatives to promote cultural and social development.



**40 Companies**

In all our business fields, our companies are focused on providing the best and fastest response to the specific needs of their customer base. Acting together, they are powerful organizations with extensive expertise and vertical integration in their industries.



**TL 9.5 Billion Net Sales**

Diversity is our strength. We earn our income from very different industries and markets. In 2019, international sales accounted for 56 percent of our total revenue.



**41 Production Sites**

Our production sites range in variety from radiopharmaceutical plants to one of the world's largest complexes for ceramic sanitaryware and tile production. Our 16 production sites abroad and 25 around Turkey are competitively located near suppliers and customers and give us privileged access to local talent and markets.



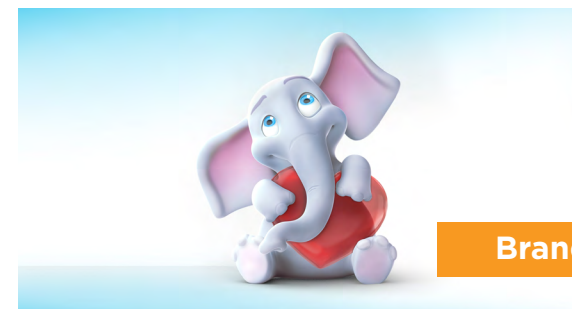
**120 International Markets**

Our products and services are available in 120 countries worldwide. Europe, which accounts for 54 percent of our international sales, is the home of our primary strategic markets; in the years ahead, we aim to grow fast in selected markets of Africa, India and the Gulf.



**Social Responsibility**

We have founded and continuously supported numerous initiatives to advance culture and the arts, scientific and public policy research, high quality education, and women in sports. We are proud to be recognized for our contributions in these areas because they enrich and strengthen our society.



**Brand Leadership**

We have leader brands in each of our main business fields. Recognizing that customers are the source of our leadership, we continually reenergize our brands with innovations and improvements that deepen their trust in us.



# BOARD OF DIRECTORS



*From left to right*

**Faik Açıkalın**  
Director

**Dr. Ant Bozkaya**  
Director

**Faruk Eczacıbaşı**  
Vice Chairman

**Atalay M. Gümrah**  
Director

**Esra Eczacıbaşı Coşkun**  
Director

**Bülent Eczacıbaşı**  
Chairman

**Ayşegül İlideniz**  
Director

**Emre Eczacıbaşı**  
Director

**Dr. Erdal Karamercan**  
Director

**Saffet Karpat**  
Director

**Hüseyin Gürer**  
Director



# EXECUTIVE MANAGEMENT



**Atalay M. Gümrah**  
CEO, Eczacıbaşı Group



**Özgen Özkan**  
CEO, Eczacıbaşı  
Building Products



**Serpil Demirel**  
CEO, Esan



**M. Sacit Basmacı**  
Chief Audit Executive



**Seyfettin Sarıçam**  
Chief Financial Officer



**Ata Selçuk**  
Chief Human Resources Officer



**Alp Günvaran**  
CEO, Eczacıbaşı  
Consumer Products



**Müge Satır**  
Acting General Manager,  
Eczacıbaşı Pharmaceuticals  
Marketing



**Hasan Pehlivan**  
CEO, Vitra Tiles



**Gürkan Papila**  
Chief Information Officer



**Emre Eczacıbaşı**  
Innovation and  
Entrepreneurship Coordinator



**Esra Eczacıbaşı Coşkun**  
Digital Transformation  
Coordinator



**Bülent Kozlu**  
Chief Investment Officer



**İlkay Akalın**  
Corporate Communications  
Director



**Cem Tanrıkilici**  
Media Relations  
Director

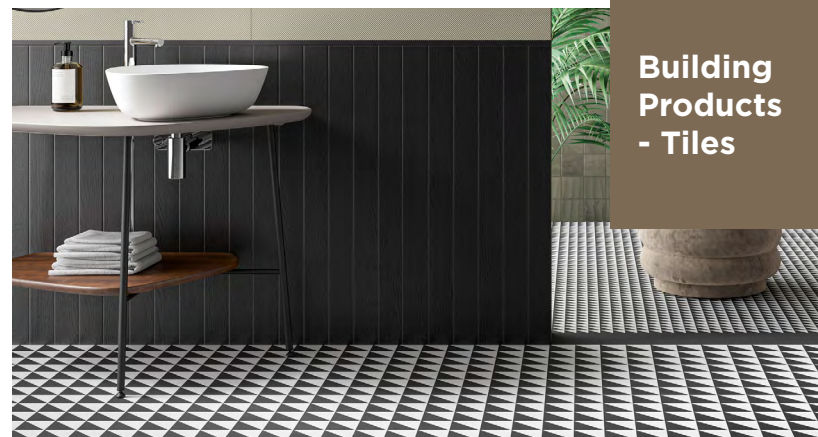


# WHAT WE DO



## Building Products - Bath

- Ceramic sanitaryware
- Taps and mixers
- Bathroom furniture
- Bathing areas



## Building Products - Tiles

- Tiles



## Consumer Products

- Tissue paper products
- Personal care products
- Baby care products
- Homecare products
- Away-from-home cleaning and hygiene products



## Healthcare

- Prescription and Non-prescription Medicine
- Food Supplements
- Personal Care Products
- Hospital Supplies
- Oncology and Rare Disease Products
- Radiopharmaceuticals

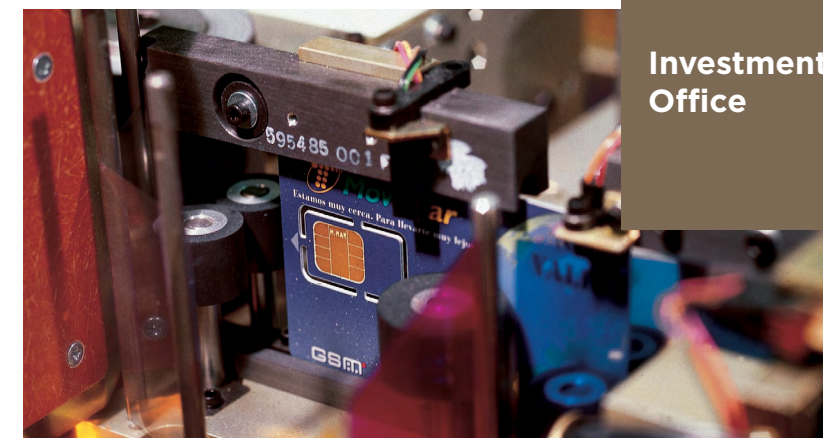
### JV Partners

- Bozlu Group (Turkey)



## Natural Resources

- Industrial materials
- Metallic mines



## Investment Office

- Property development and facility management
- Smart cards
- Foreign trade
- IT services
- Insurance

### JV Partners

- Giesecke&Devrient (Germany)
- İş REIT (Turkey)



## THE ECZACIBAŞI GROUP'S RESPONSE TO COVID-19

*The Eczacıbaşı Group is dedicated to providing societies with the products and services required for modern, high quality, and healthy living.*

The Eczacıbaşı Group is dedicated to providing societies with the products and services required for modern, high quality, and healthy living. Hence, one of our principal social responsibilities during the Covid-19 pandemic is ensuring the continuity of our manufacturing operations, especially those producing critical goods and services. While doing this, our top priority is protecting the health of our employees and their families, our business partners, and our communities. From the very beginning, we have taken every safety precaution recommended by local, national and international health institutions.

### Health and Safety Precautions at the Workplace

On 20 March 2020, we began to use the full range of digital platforms to continue our business processes without interruption from the safety of our homes. Accordingly, we moved all our internal meetings and communication with external stakeholders to online platforms. Production plants continued to operate with a high level of precautions, including continual disinfecting of all surfaces in service buses, workspaces, common areas and utility rooms; new seating arrangements on

service buses, in cafeterias and other common areas; and obligatory use of masks and other protective equipment.

Starting on 11 May 2020, office employees have returned to the office on a week-by-week rotational basis. Throughout the month of July, we will maintain the number of personnel in offices at 60 percent of normal levels through rotational home office-workplace office schedules.

### Communication of Information

Using only the most reliable sources, we are providing continual updates to employees on:

- Measures for protecting themselves in the workplace, after travel, or after contact with a person or object that might be infectious,
- New precautions and developments,
- Ideas for activities and events that employees and their families can participate in at home during their free time.



With awareness, determination and patience, we will get through this difficult period together.  
#birlikteaşarız (together we'll prevail)



We have also established online services for Eczacıbaşı employees and their families that provide:

- Accurate, up-to-date information on health-related subjects and direct access to our occupational health teams,
- 24/7 free consultancy with experts in psychological, legal, and nutritional fields.

### Health Monitoring

As soon as Covid-19 was detected in Turkey, our healthcare team developed a protocol for monitoring, reporting, and handling potential Covid-19 infections among

Eczacıbaşı Group employees. Our healthcare personnel operated a 24/7 online health hotline and provided guidance and support to personnel with health issues potentially related to Covid-19. They also maintained constant communication with personnel who contracted the virus to ensure their rapid treatment and recovery and to support their family during this period.

### Travel

We cancelled all non-essential trips on 20 March 2020, before the nationwide lockdown. Although the national travel ban was partially

lifted on 1 June 2020, we are asking our employees to follow a high-level protocol of pre- and post-travel precautions, including postponing personal travel on public transportation in order to protect themselves, their families and colleagues at work.

### Donations

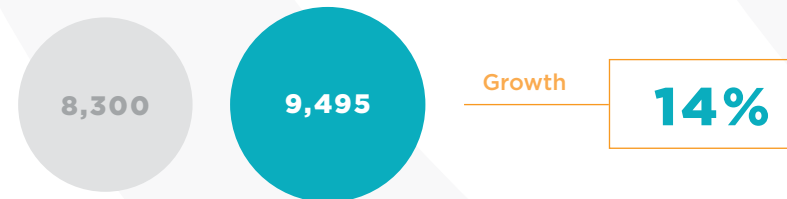
We firmly believe that we can overcome this pandemic through collaboration and mutual support based on reason and science, and that every segment of society should contribute to these efforts. Accordingly, we have set aside TL 10 million for donations in cash and kind to virus containment and mitigation efforts. These donations include:

- TL 2 million donation in cash and 327 thousand bottles of cologne sanitizer to the National Solidarity Campaign initiated by the Presidency of the Republic of Turkey,
- Free supplies of disinfectants, tissue paper products and cleaning products to hotels providing free room and board to healthcare workers,
- Medical equipment and cleaning supplies to healthcare centers in 53 cities, including all cities near our production sites,
- Free use of VitrA Innovation Center's rapid production capacity to make critical medical parts, tools and supplies. The center is also contributing its printing services through the 3D Support Collective Production Movement, of which it is a member.

## FINANCIAL HIGHLIGHTS

*The Eczacıbaşı Group raised its total net sales by 14 percent in Turkish lira terms and defended its position in a turbulent global market.*

### Total Net Sales\* (mln TL)



### Total Assets (mln TL)



\*Consolidated results of Group companies

2018 2019

### International Sales\* (mln €)



### EBITDA\* (mln TL)



2018 2019



# Business Areas

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- 24 Building Products - Bath  
Building Products - Tiles
- 30 Consumer Products
- 34 Healthcare
- 36 Natural Resources
- 38 Investment Office





## BUILDING PRODUCTS

*Specializing in complete bathroom and tiling solutions for industry professionals, homeowners, commercial establishments, and public buildings, Eczacıbaşı Building Products is the uncontested leader of Turkey's ceramics market.*

Specializing in complete bathroom and tiling solutions for industry professionals, homeowners, commercial establishments, and public buildings, Eczacıbaşı Building Products is the uncontested leader of Turkey's ceramics market. It is also a major player in Europe and a growing contender in the Middle East, North Africa, India and Southeast Asia with three powerful international brands.

As an aspiring leader of the global market for complete bathroom solutions, we have 12 plants in Turkey, Germany, France and Russia with a combined capacity of 5.6 million ceramic sanitaryware units, 28 million square meters of tiles, 400 thousand modules of bathroom furniture, 2 million mixers, 350 thousand acrylic bathtubs and shower trays, 500 thousand concealed cisterns and 1.25 million toilet seats. Our

production complex in Bozüyük, Turkey, is one of the world's largest and most advanced manufacturing centers for ceramic sanitaryware.

### Powerful International Brands

The Eczacıbaşı Group has three international brands for building products: Vitra for both bathrooms and tiles, Villeroy&Boch for tiles, and Burgbad for bathroom furniture.

The Vitra brand is dedicated to using its expertise in design and innovation to making bathrooms more meaningful and special. It is the only brand in global markets offering every bathroom component and applies more than 60 years of design intelligence to the total bathroom concept to create inspiring spaces with a wide range of choices, complete to the smallest detail. Drawing from its production facilities in Turkey and Russia, Vitra supplies millions of ceramic sanitaryware units each year to over 75 countries on five continents, accompanied by matching bathroom furniture, bathtubs, faucets, accessories and tiles. In the tile category, Vitra extends its design intelligence and architectural systems concept beyond the boundaries of the bathroom to kitchens and living rooms, terraces and pools with a wide diversity of solutions for indoor and outdoor spaces that are aesthetic and innovative, sustainable and modular, and that harmonize different colors, patterns and textures.

Burgbad is a premium interior furniture brand in Europe offering countless creative solutions for confidently stylish bathrooms with sophisticated aesthetics and technology. Bathroom furniture by Burgbad combines form and function at the highest level with a maximum of durability, solidity and reliability resulting from superior materials and processing and finishing precision. As a high-end brand, Burgbad is aimed at customers who appreciate fine handcraft, innovative design, and exquisite materials of high value.

Villeroy&Boch is an innovative and timelessly elegant ceramic floor covering brand not only for bathrooms and living areas but also outdoor spaces. Using only

the highest quality materials to ensure a consistently superior performance for architects and building planners everywhere, Villeroy&Boch creates unlimited design options for both homeowners and professionals.

İntema Yaşam is a brand and a space offering everything to do with kitchens: kitchen suites for rent or sale, eateries and cafes, cooking workshops and other gastronomic events, all kinds of cooking utensils, equipment and tableware, natural foods and more. İntema Yaşam's mission is to encourage people to prepare and eat food together and share stories.

### Turkey's Leading Ceramics Exporter

Turkey is an important global supplier of ceramics: It ranks first in Europe in both the production and export of ceramic sanitaryware and fifth globally in both categories. In covering materials, it ranks third in Europe and fifth globally in both output and export. Our ceramics operations have contributed greatly to these achievements.

*The first ceramic sanitaryware producer in Turkey to export its products, the Eczacıbaşı Group today is Turkey's top exporter of ceramic sanitaryware and tiles, with sales to Central Europe, Russia, the British Isles, and India.*

In 2019, the Eczacıbaşı Group supplied 51 percent of all ceramic sanitaryware exports and 16 percent of all tile exports from Turkey. Europe is our largest market, accounting for more than 60 percent of our total sales. Our presence is particularly strong in Germany, where we are the second largest supplier of ceramic tiles and the third largest supplier of ceramic sanitaryware

and bathroom furniture. We are also a major player in France and the UK, where we place second and third respectively in ceramic sanitaryware.

Our strategic markets are Turkey, Germany, the UK, France, Russia and, for bathrooms, India, where we have expanded our distribution network over the past seven years. In Europe, where we have decades of experience, we are strengthening our sales network for bathrooms with local operations like Vitra Italy. All of our bathroom sales are now structured under four regional directorates: Turkey, Russia and regional markets; Europe; India and Southeast Asia; and the Middle East and North Africa. Tile sales are managed under our two international brands: Villeroy&Boch and Vitra.

### New Investment in Production Technology

In 2019, Eczacıbaşı Building Products completed a major investment in a fourth ceramic sanitaryware line at the Bozüyük complex that raised our capacity in this category by 1.1 million units. The new plant combines an advanced level of automation, such as humanoid robots, with hybrid production technologies that enable us to produce both labor-intensive custom models and general models for mass production. In line with our sustainability principles, the plant also makes widespread use of semi-automatic load lifting equipment to improve worker safety and comfort and is equipped with the most energy-efficient kilns currently available. Additionally, it features a roof structure that maximizes the use of sunlight for internal lighting.

Vitra Tiles continued to expand its use of dry rectification technology in its tile plants in Germany. Dry





rectification has increased the sustainability qualifications of our porcelain tile products by removing water from the rectification process.

### Digitalization Projects to Strengthen Future Performance

In 2019, our building products operations completed a large number of projects targeting data analysis, omnichannel management, smart product exploration, digital supply chains and smart factories.

One of these is VitrAmin, a comprehensive project to renovate our technological infrastructure and increase our command of data. We also launched several customer-focused applications that make it easier for customers to choose between bathroom styles or design their own style from scratch. These applications use virtual reality technology to give customers a real feeling for their designs. Importantly, the output of these applications can be saved and sent directly to sales so that customers can quickly and easily obtain estimates of different choices.

### Design and Functional Innovation

Our quest is to create beautiful and inspiring living environments and to transform time spent in the bathroom into a relaxing and life-enriching experience.

In addition to our own highly-accomplished in-house design team, we collaborate closely with a world-class team of independent designers, each with their own creative instinct and flair for bathroom aesthetics and functionality.



*In 2019, we launched two designer collections: Equal, a collaboration with the influential Italian designer Claudio Bellini, and Origin, a faucet, fixture and accessories series created by the VitrA Design Team.*

Equal is a contemporary collection that infuses the bathroom with tranquility through its use of pure shapes and seamless joints. It combines the illusion of fluidity, using smooth edges to mimic the natural cavities found in lakes, with structured lines to create perfect harmony throughout the collection.

Origin is graceful and minimalist. Subtle lines and sleek designs evoke simplicity and purity while unmatched color alternatives create a wealth of choice for customized bathroom design.

New tile collections included Villeroy&Boch's ROCKY.ART, a high-quality design concept that combines nature and art themes. Porcelain stoneware tiles in five formats and four harmoniously coordinated shades of beige and grey form the base of this collection, while artistic, abstract floral décor plays with details

of hydrangea blossoms in three variations. The collection won a 2019 Red Dot Award for product design.

VitrA's recent collections, such as Miniworx, Mode, Retromix and ColorCode, are systematically designed to offer creative tiling and stylish mix and match solutions not only among themselves but also with other VitrA systems. This way, the brand is able to offer architects and end users a simplified, yet versatile portfolio that offers countless creative tiling options.

In addition to design-focused collections, we created innovative solutions for comfort and hygiene in 2019.

VitrA Aquacare is a mechanical bidet function with an easy to install and effective solution for integrated backflow that adheres to stringent water regulations. It comes as a complete set: a WC with a pre-assembled and integrated air breaker, and a WC seat and cover. The WC pan requires no additional equipment or preparations aside from water installation and connecting the bidet function is fast and easy. This highly engineered solution is unique and has patent applications pending.

*V-Care is a high-end bathroom series combining design excellence and smart technology to provide enhanced indulgence and increased hygiene in a more personalized way.*

The V-Care Smart Toilet, designed in collaboration with Arik Levy, offers a touch-free cleaning experience. Every feature from seat opening to drying can be customized and controlled by a remote, mobile app, or by voice. Like VitrA Aquacare, the

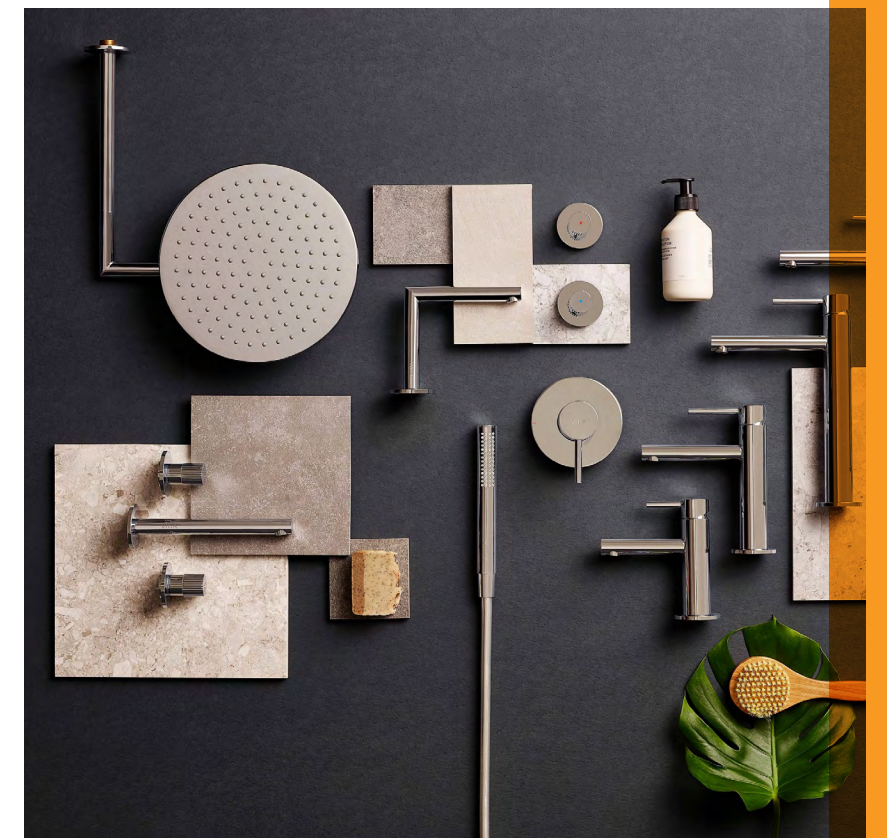
V-Care Smart Toilet adheres to all international regulations with respect to water backflow.

The V-Care series includes an elegant mirror and smart panel. The V-Care mirror provides a personalized, voice or phone-controlled interface and a choice of pre-set moods or can be programmed to create personalized music and lighting ambiances. The V-Care Smart Panel is an easy-to-clean, durable glass cistern panel equipped with smart sensors, functions and diagnostic algorithms. Using a VitrA app, users or businesses can monitor how often and when a toilet is flushed and adjust settings accordingly. The panel also notifies users of water shortages, power outages and drainage failures.

In the tile category, we launched new surface technologies that

enhance hygiene, safety and comfort. VitrA Shield is an application of nano titanium dioxide (TiO<sub>2</sub>) coating on indoor and outdoor tiles. Thanks to the photocatalytic and biocidal properties of TiO<sub>2</sub>, which are activated by light and humidity in the air, VitrA Shield tiles are self-cleaning and provide long-lasting hygiene protection. without the constant use of harsh cleaning chemicals. They also eliminate unpleasant smells and airborne pollutants.

VitrA GlowSafe is a safety glow technology comprised of a phosphorus polymeric compound that is easy to apply on tile surfaces and long lasting. Undetectable to the eye in daylight, VitrA GlowSafe emits a green glow all night long to indicate steps and walkways both indoors and outdoors.





## Turkey's Best Mid-Sized R&D Center

All of the innovative products we launched in 2019 were created at the Vitra Innovation Center, which continued to distinguish itself as a leading innovation center in Turkey. Last year, Turkey's Ministry of Industry and Technology changed the categories of its performance survey from industries to number of R&D personnel. Following five years of leadership in the glass and ceramics category, Vitra Innovation Center again placed first in its category, which includes R&D centers from every industry in Turkey employing 76-250 R&D people.

In 2019, Vitra Innovation Center supported a Bill and Melinda Gates Foundation project to develop a hygienic portable toilet for refugees and seasonal workers living in camps. Five startups from the US, Palestine, India, Jordan and Turkey were chosen from among the many respondents to the open innovation call issued by the Eczacıbaşı Group and the Bill and Melinda Gates Foundation. During the second half of the year, these startups came together at the Vitra Innovation Center to use its laboratory and equipment for 3D technologies, functional and ergonomics testing, materials technologies, chemical testing, and later to demonstrate portable toilet models.

## Promoting our Award-Winning Brands

Our brands received 29 international awards in 2019. Vitra alone won 23 international awards: three for two new bathroom series and 20 for new tile series, including Red Dot, Good Design, Wallpaper, Iconic, iF Product Design and German Design awards.

To promote our award-winning brands, Eczacıbaşı Building Products regularly participates in the world's leading building fairs: UNICERA in Istanbul, ISH in Frankfurt, and Cersaie in Bologna. In 2019, we exhibited our new collaborations with celebrated international designers as well as our latest smart products at ISH. At the Cersaie fair, we exhibited our new cement and wood-like tile collections, and for the first time, our new faucet, fixture and accessories collection for international market designed by the Vitra Design Team.

Showrooms are an important component of our marketing strategy for building products in Turkey and abroad.

*In 2019, we finished preparations for a new showroom in the stunning Turnmill building at Clerkenwell, London, a center for creative industries and particularly professionals working on venue design. It also moved forward with the construction of showrooms in Dubai and Mumbai.*

In Turkey, we opened KaroDepo [Tile Warehouse] in 2019. Located close to the Sabiha Gökçen

International Airport Istanbul, KaroDepo offers a very different showroom experience. The venue invites visitors to examine our newest tile products, systems and innovations all year-round with displays of international fair quality. It also has a meeting room for product launches, workshops and other events.

Another new marketing venue is VBenzeri Venue, located above the prestigious Nişantaşı showroom. The venue is hosting architecture and design events organized by industry professionals and universities as well as the Division's brands.

Vitra, our flagship bathroom brand, also continues to collaborate with the Royal Institute of British Architects (RIBA) through the RIBA + Vitra Architectural Talk. In 2019, the talks hosted 10 architects in London, including Daniel Libeskind and Eduardo Souto de Moura.

Vitra is also a longtime supporter of the Pavilion of Turkey at the Venice Biennale's International Architecture Exhibition and the main sponsor of the Istanbul Design Biennial.



## Our North Star: UN Sustainable Development Goals

Sustainability is a key concern of all our building products operations. While every brand has its own approach to sustainability, they share the same commitment of contributing to a better future through environmentally and socially responsible business practices and decisions that advance the UN Sustainable Development Goals.

Blue Life is the name that we give to the production approach, design attitude, and management outlook of all Eczacıbaşı Building Division brands with respect to the health of our planet. For more

than a decade, our operations have ceaselessly looked for ways to improve the efficiency of their energy and water use and reduce their waste. They have also designed products that help users do the same.

In recent years, Vitra has expanded its sustainability efforts into the field of equal opportunities, with the joint aim of raising the presence of women in its operations and promoting gender equality in society at large. In 2019, our flagship brand launched three projects in Turkey to support equal opportunities.

The first targets women who are preparing for a career in engineering by offering

scholarships and mentoring to women engineering students at Turkey's top technical universities. In 2019, 12 students were selected for the program. The second is a childcare support program for working mothers. The program is helping women employees with young children cope with new parenting responsibilities by giving them access to high quality daycare. The third is a collaboration with the Mother Child Education Foundation (AÇEV) to support equal opportunities in the family setting by improving the contribution of fathers to parenting through group training.



## CONSUMER PRODUCTS

*Eczacıbaşı Consumer Products is the manufacturing, marketing and sales company for many of Turkey's leading brands in the tissue paper, baby care, personal care, household care, and away-from-home segments.*

Eczacıbaşı Consumer Products is the manufacturing, marketing and sales company for many of Turkey's leading brands in the tissue paper, baby care, personal care, household care, and away-from-home segments. It also has one of the most powerful sales organizations in Turkey, managed by an experienced and dynamic team and offering extensive coverage throughout the country.

### Turkey's First Tissue Paper Plant

Since 1969, when the Eczacıbaşı Group established Turkey's first

modern tissue paper plant, we have led the expansion of Turkey's tissue paper market. Today, we have two plants in Turkey and one in Kazakhstan producing 180 thousand tons of tissue paper annually for our five powerful tissue paper brands serving diverse consumer needs and the away-from-home market.

*Selpak, our flagship brand in Turkey as well as in regional markets, is so well-known that consumers in Turkey use it to refer to all pocket pack facial tissues.*

Selpak is the innovator brand with new solutions for comfort, cleanliness and hygiene and offering the highest possible quality to new generations of consumers. Selpak Deluxe, our family of innovative products that exceed customer expectations, expanded its portfolio in 2019 with the Selpak Deluxe Almond Milk Enriched Bathroom Towel, a novel product that transforms tissue paper use in the bathroom.

For more than 40 years, the Solo brand has provided quality tissue paper products at economic prices to families with tighter budgets. Solo is so well established among Turkish consumers of a certain age that many people know its early "Solo Soloo Solooo" jingle by heart.

Silen and Servis meet consumer needs in the economic segment, while Selpak Professional serves the away-from-home market.

The Eczacıbaşı Group has exported tissue paper since the 1990s, first as parent reels and semi-finished products, then as a growing range of tissue paper products under the Selpak brand. In 2001, we began a major drive to build consumer awareness of Selpak in regional international markets. Today, Selpak

touches consumers in more than 80 countries across five continents and is well on its way to becoming a promising global player. Selpak leads the premium segment of tissue paper markets in Kazakhstan, Georgia, Lebanon, United Arab Emirates and, most recently, Morocco, where it has established a local operation. In Ukraine, it is the second strongest brand. Sales of Selpak are also growing rapidly in the United States, Israel and other new markets.

### A Specialist in Baby and Mother Care

Eczacıbaşı Consumer Products has two brands for baby and mother care: Uni Baby and Uni Mom.

*Backed by a production capacity of 168 million wipes per year at our plant in Turkey, Uni Baby is the longtime leader in the wet wipe market and by far the most popular baby care brand in Turkey.*

Originally focused on wet wipes, Uni Baby now offers a growing range of sensitive-to-skin baby care products that include bath time and skin care products, gentle laundry cleaning and softeners, and a range of gentle cleaning products for newborns. In 2019, we also launched the Uni Baby Aloe Vera range of shampoo, detergent and softeners.

Uni Mom is a new brand with a growing range of maternity and post-maternity personal care products for new moms.

In baby and mother care, our innovation is shaped by research at the Uni Baby Insight Center. There, new mothers are invited to talk about their experiences, interact with babies, and carry out regular tasks like breastfeeding, feeding,



wiping or washing baby, and washing baby clothes.

### Personal Care

Eczacıbaşı Consumer Products has several brands in the personal care category: OKEY, Selin and Egos. Launched in 1991, OKEY is the most trusted sexual wellbeing brand in Turkey. The OKEY brand was created by the Eczacıbaşı Group with the support of Turkey's Family Health and Planning Foundation (TAPV) and initially focused on condoms. In recent years, the brand has expanded its offering of products and, through its website and advertising campaigns, sought to dispel myths and advocate healthy and fulfilling sexual lives. In 2019, OKEY took an important step

by adding a new family of products targeting women.

As Turkey's best-selling condom brand, OKEY is committed to enhancing the public's awareness of sexual wellbeing and is an active supporter of the ALO OKEY sexual health helpline managed by TAPV.

Selin is a popular eau-de-cologne brand that builds on a history of cologne-making in the Eczacıbaşı family. In 1912, Süleyman Ferit Eczacıbaşı, the father of the Eczacıbaşı Group's founder, produced a line of highly regarded colognes at his pharmacies in Izmir. Inspired by this tradition, we launched Selin in 1980 as a lemon cologne for modern lifestyles. This new approach helped to preserve



Turkey's cologne culture over the next two decades. In 2017, we re-launched Selin as a brand of colognes inspired by nature, with a growing range of garden and forest scents.

EGOS entered the hair jelly market in 1991 with the mission of making young people confident about their hair styles. EGOS offers a portfolio of high-quality hair jelly and wax products.

### Hygiene Partner for Away-from-Home Establishments

Eczacıbaşı Consumer Products has a unit focused on product and service solutions for away-from-home customers: Eczacıbaşı Profesyonel. Through this unit, we provide professional cleaning,

hygiene and refreshment solutions to about 11 thousand business establishments throughout Turkey.

*We are one of the top solution providers in this industry, offering a wide range of cleaning and hygiene products under the Selpak Professional, Maratem and Dispo brands and a selection of foodstuffs commonly used by commercial establishments.*

Many of our cleaning products are manufactured at our plant in Turkey, which has an annual capacity of 24 thousand tons. We also provide training, auditing and consultancy services to away-from-home establishments through the EP Academy program. In 2019, this program provided in-person, on-site chemical and hygiene

training to 12 thousand employees in the service sector.

### Collaboration with International Brands

Eczacıbaşı Consumer Products offers professional sales and distribution services to leading international brands that want to advance their strategic goals in Turkey. We have developed a sales structure with an omni-channel approach, so as to be present and active at every point where consumers in its categories are shopping or may shop in the future. This includes online shopping as well a great variety of physical stores, from discount stores to large supermarket chains, gas stations and even clothing shops.

In 2019, we carried out an award-winning survey with the research company Sia Insight on digitalization and environmental sensitivity in the B2B sector. The project aimed to understand how consumer products purchasing personnel in the away-from-home sector view digitalization and how concerned their companies are about environmental issues. Our findings are shaping our product development and communication.

### Contributing to a Healthier World

With the opening of our R&D center in 2019, we have begun working on new technologies that lead to greater value-added products. Numerous projects have led to patent applications and academic papers. During the center's first year of operation, we made 12 patent applications and published a scientific article on ion-driven aggregation and the development of a water-soluble 3-formylBODIPY.

The COVID pandemic of 2020 has raised public awareness of hygiene-related issues and made it a top concern of every household and away-from-home establishment.

*Naturally, we are doing everything we can to ensure that the public has access to critical hygiene and personal care products during this time. We are maintaining or increasing our levels of production and participating in national solidarity campaigns. Backed by our new R&D center in Gebze, we are focusing our tremendous expertise in hygiene on developing antiseptic and hygiene solutions that are effective against viruses.*

Our R&D center is equipped with analytical and microbiology labs where we test our products to ensure the highest performance.

While increasing the hygiene standards of living spaces, we are committed to reducing the environmental footprint of our products and services. Eczacıbaşı Profesyonel is one of our sustainability champions in this regard, because it promotes efficient, effective and environment-friendly cleaning solutions in the away-from-home sector. It is also contributing to the improvement of hygiene practices in away-from-home establishments through free online hygiene training programs.

In 2012, Eczacıbaşı Profesyonel launched the "Eco-Touch" initiative, a marketing platform for environment-friendly hygiene and cleaning products to advance sustainable solutions in the away-from-home sector. In 2019, we introduced customers to the Selpak Professional Recycled Portfolio, Turkey's first portfolio of tissue paper products for away-from-home establishments made from, and packaged with a blend of pulp waste, new pulp, and first-class printing waste.

In addition to paper products, the Eco-Touch product portfolio includes Green Care, a sub-brand of Tana Professional that is certified as meeting the rigorous environmental performance and reporting standards of the EU Ecolabel and Nordic Ecolabel. All Eco-Touch products area categorized by the number of "points" they can contribute to customers wishing to obtain green business certification. We also offer customized labeling and signage for rooms, bathrooms, dining halls and other public spaces so that customers can express their

sustainability commitment and invite end-users to use resources more sustainably as well.

### Advancing Good Hygiene Practices

Since 2002, the Eczacıbaşı Group's tissue paper brands have organized personal hygiene classes for close to 6 million primary school students around Turkey with the aim of preventing diseases caused by poor personal hygiene.

In 2006, these efforts received a World Business Award for their contributions to the United Nations Millennium Goals. The Selpak Personal Hygiene Program is a fundamental component of the Eczacıbaşı Hygiene Project, our long-running project to enhance the physical, intellectual and emotional environments of boarding schools serving students from rural and low-income regions in Turkey.

In 2011 we launched the Selpak Hello Potty platform to support new parents with toddlers entering the toilet training age, an important and often difficult stage. The platform provides information and other resources and answers parents' questions. To date, more than 18 million mothers and fathers have accessed the platform, which generally has more than 150 thousand followers.

We also organize hand hygiene classes for primary schoolchildren on 5 May World Hand Hygiene Day. Since 2014, Eczacıbaşı Profesyonel has visited 20 schools in seven cities to talk to students about the importance of good hand washing practice and demonstrate the best way to wash their hands.





# HEALTHCARE

*For almost 80 years, the Eczacıbaşı Group has improved the quality of life for people of all ages with modern, reliable, and innovative healthcare solutions.*

For almost 80 years, the Eczacıbaşı Group has improved the quality of life for people of all ages with modern, reliable, and innovative healthcare solutions. Today, our principal healthcare operations are Eczacıbaşı Pharmaceuticals Marketing and Eczacıbaşı-Monrol Nuclear Products.

## Eczacıbaşı Pharmaceuticals Marketing

Eczacıbaşı Pharmaceuticals Marketing carries out the marketing, promotion, sales and distribution of imported and contract manufactured pharmaceuticals for mass and niche markets and health-based personal care products. Our current portfolio includes both innovative and generic products licensed by Almirall, Astellas, Alpha Sigma, Baxter International, Biogaia, Chugai, Galderma, Novartis, Procter&Gamble, Sanofi, Synthon, Tillotts Pharma and Univar, as well as our own brand of nutritional supplements.

We have four business units — Specialty and Consumer Health Care, Primary Care, Hospital Care, and Rare Diseases and Oncology — that work with more than 25 district managers all around the country.

Over 250 sales representatives visit more than 18,000 doctors and 5,000 pharmacies on a regular basis, and their visits are processed daily and monitored by our sales force automation system.

Increasingly, our growth and operational performance are driven by niche therapeutic and innovative products for oncology and rare diseases, where we are establishing new and mutually beneficial partnerships with international companies specialized in these areas. We are also working on the development of digital business models that can contribute to preventive diagnosis, treatment follow-up, and lifelong wellness within the hospital and healthcare system.

## Specialization in Oncology and Rare Diseases

Cancer treatment and oncology supportive care portfolio of Eczacıbaşı Pharmaceutical Marketings includes products for treating prostate cancer, lung cancer, rare tumors and hematological malignancies, and managing chemotherapy induced neutropenia, nausea and vomiting.



*In 2019, Eczacıbaşı Pharmaceuticals Marketing established a strategic partnership with Novartis on exclusive marketing and sales rights for three important oncology and hematology products in Turkey.*

Rare diseases are generally inherited diseases that appear early in life and are chronic and/or life threatening. The estimated number of such diseases worldwide ranges between 6,000 and 8,000.

Two major challenges in the field of rare diseases are increasing the medical community's awareness and ensuring patients' access to the most advanced treatments worldwide.

Currently, we are focused on four therapeutic areas: Amyloidosis, Familial Chylomicronemia Syndrome, ALS, Wilson Disease.

Eczacıbaşı Pharmaceuticals Marketing is collaborating with R&D companies, the Turkish Ministry of Health, and public and private healthcare providers in both oncology and rare disease area.

## Contributing to Healthy Lives

In 2019, Eczacıbaşı Pharmaceuticals Marketing launched Dynavit, our own medically-supported line of food supplements for people who want to lead healthy and fulfilling lives. The series currently has 17 mineral and vitamin SKUs formulated for the different needs of every age group. In addition to expanding this series, we are preparing to launch newly formulated products in the pediatric, immune support, bone & joint health and woman health categories.

## Eczacıbaşı-Monrol Nuclear Products

*Eczacıbaşı-Monrol Nuclear Products is a leading developer, manufacturing and distributor of radiopharmaceutical products in the Balkans, Middle East, North Africa, and Central and Eastern Europe. It has seven world-class production facilities, four*

*in Turkey and three abroad in Bulgaria, Romania and Egypt.*

Employing modern and environmentally responsible production technologies, the company produces a broad range of diagnostic and therapeutic products, including FDG, FLT, NaF, Mo-99/Tc-99m, Iodine-131, Thallium-201, MIBG-131 and 123, and MIBI, MDP, DMSA, DTPA, ECD cold kits, and, since 2019, Lutetium-177.

We are also a growing exporter of these products, with sales to more than 40 countries mainly in the EU, MENA, and Asia Pacific regions. In 2019, we started exporting to South America, expanding our reach from China to Colombia.

## Providing Consultancy and R&D to Neighboring Regions

In addition to manufacturing radiopharmaceuticals, Eczacıbaşı-Monrol provides consultancy and operational services to public and private institutions that wish to produce PET radiopharmaceuticals for their diagnostic and treatment centers. We currently operate cyclotrons in Kuwait, Libya, Iraq, Pakistan and also we have long term operational agreements with two centers in Turkey and one center in Dubai.

Alongside production and consultancy activities, Eczacıbaşı-Monrol carries out research and development activities in collaboration with national universities and international nuclear research centers. As a result of these efforts, we added Lutetium-177, a highly promising new treatment for prostate cancer and neuroendocrine tumors, to our portfolio in 2019. Eczacıbaşı Monrol is the fourth company worldwide to produce this targeted therapy product.



## New collaboration with Telix of Australia

In 2019, Eczacıbaşı-Monrol signed a production and distribution agreement with Telix Pharmaceuticals, a global leader in the field of radiopharmaceuticals for diagnostics and therapy. According to the agreement, Eczacıbaşı-Monrol will produce TLX250-CDx (89Zr-girentuximab), an innovative product developed by Telix for the imaging of renal cell carcinoma with PET, and distribute it in Turkey, the Middle East and North Africa. The agreement also adds four Turkish clinical sites to the international Phase III ZIRCON trial.



## NATURAL RESOURCES

*The Eczacıbaşı Group is one of Turkey's foremost industrial mineral and metallic mineral producers and exporters through its natural resources company, Esan Eczacıbaşı Raw Materials.*

The Eczacıbaşı Group is one of Turkey's foremost industrial mineral and metallic mineral producers and exporters through its natural resources company, Esan Eczacıbaşı Raw Materials. Esan was established in 1978 to produce high quality raw materials for the ceramics sector. Today, we are one of Turkey's top suppliers of industrial and metallic minerals. Our mission is to explore, process and add value to natural resources in a responsible manner towards people, the environment and the future of the world, and to offer these products globally.

Esan currently operates 40 mines and quarries, and nine processing plants that collectively produce 3.5 million tons of high-quality raw materials, including feldspar, quartz, kaolin, ball clay, zinc and lead concentrate. Backed by the largest feldspar reserves in Turkey, Esan is the world's largest producer of sodium feldspar. Exports to more than 50 countries around the world account for about 80 percent of our sales. In addition to our operations in Turkey, we have three representative offices in Italy, Ukraine and China through which we manage our global network. Esan's lead and zinc mine in Balya,

Turkey, processes 1.5 million tons of ore annually and produces 135 thousand tons of concentrate. This operation alone supplies 45 percent of Turkey's lead exports and 22 percent of its zinc exports, making us the country's top exporter of lead and one of its principal zinc exporters. In addition to its own products, Esan markets and sells more than 150 high-quality minerals and other industrial inputs and equipment to industries in Turkey.

### Sustaining Growth through Exploration

*Fueled by strong growth in metallic mines, Esan increased its sales more than 10-fold over the last decade. Maintaining this growth requires continual efforts to find new reserves, which is why we carry out some 100 thousand meters of exploratory drilling every year.*

About 40 percent of this activity takes place at the Balya mine, which now has a depth of 940 meters and a total length of 122 kilometers.

Esan's priority is to explore and discover important metallic and

industrial mineral reserves in Turkey, but we are also looking for opportunities to apply our expertise in exploration and extraction in Portugal, Kazakhstan and Ukraine. The primary focus of our exploration activities is base and precious metal in international markets.

### Best Practices in the Natural Resources Industry

Esan has the future firmly in focus with its sustainability approach. In addition to achieving steady revenue growth, we aim to be one of the industry leaders in occupational health and safety, environmental performance, and research and development. We also aim to improve the wellbeing of society at large, starting first with our own employees by being the very best employer.

One of Esan's top priorities is to recruit more women and create a workplace environment that encourages women to develop their careers at the company. Thanks to our recruitment policies, efforts to ensure fairness at the workplace, and social responsibility projects aimed at supporting women, Esan employs a higher

share of women than any other company in Turkey's mining industry.

In 2019, Esan received its second certification as a Great Place to Work® and entered the GPTW List of Turkey's Best Workplaces. In both cases, Esan is the first in its industry to be recognized for its achievements. Being the first to do something is part of the company's heritage, as is setting new standards for quality, productivity, occupational health and safety, and environmental sensitivity.

Since 2017, when Esan established its occupational health and safety system Target Zero Harm, lost time from accidents has fallen by 40 percent. Our corporate culture of safety is complemented by high-tech safety measures, including a safety system for underground metallic mineral mining that uses RFID technology to track the real-time location of personnel and equipment underground, measure important environmental indicators like gas levels and temperature,

and provide a signaling system for underground vehicle traffic. It is the first application of IoT technology in the industry and is unique for its breadth (personnel and equipment tracking, position-based traffic signaling, speed measurement), its use of wireless technology, and its precision positioning capability throughout the full length of the Balya mine's underground galleries. In 2019, the system won the RFID Journal's Best Practice Award.

Esan's environmental sensitivity has been a key aspect of its operations from the day of its establishment 41 years ago. Before starting any operation, we design how we will close and rehabilitate our field of operation. In addition to complying with the environmental regulations of our industry, we implement numerous voluntary procedures for measuring, monitoring, and reducing environmental risk. We also undertake projects that reduce our energy, water consumption and waste. This sustainability approach is supported by our innovative culture, the advanced laboratory

network at our operations, and our R&D Center, which the Ministry of Science, Industry and Technology certified as a full-fledged R&D center in 2019.

*In 2019, Esan's ore recovery project at the Balya lead and zinc mine won the Sustainable Innovation award of the Sustainable Business Awards-Turkey.*

The project contributes to sustainability by recovering ore in underground mud formerly classified as waste, and is a first for the mining sector in Turkey. In 2019, we also completed the planting of 40 thousand trees, a reforestation project we started a year earlier on our 40<sup>th</sup> anniversary.

Esan carries out community projects that support women and children and promote greater awareness of environmental and safety issues. In 2019, for example, we joined an income-generating project developed by the Balya Chamber of Agriculture and Balya Public Education Center to empower local women and support local agriculture. We participated in the Science Movement launched jointly by the Young Guru Academy and Turkey's Ministry of Education, and we distributed gift bags to needy children all around Turkey on 23 April National Children's Day.





## INVESTMENT OFFICE - KANYON

*Kanyon is the Eczacıbaşı Group's first and largest commercial property and a joint venture with the İş Real Estate Investment Trust.*

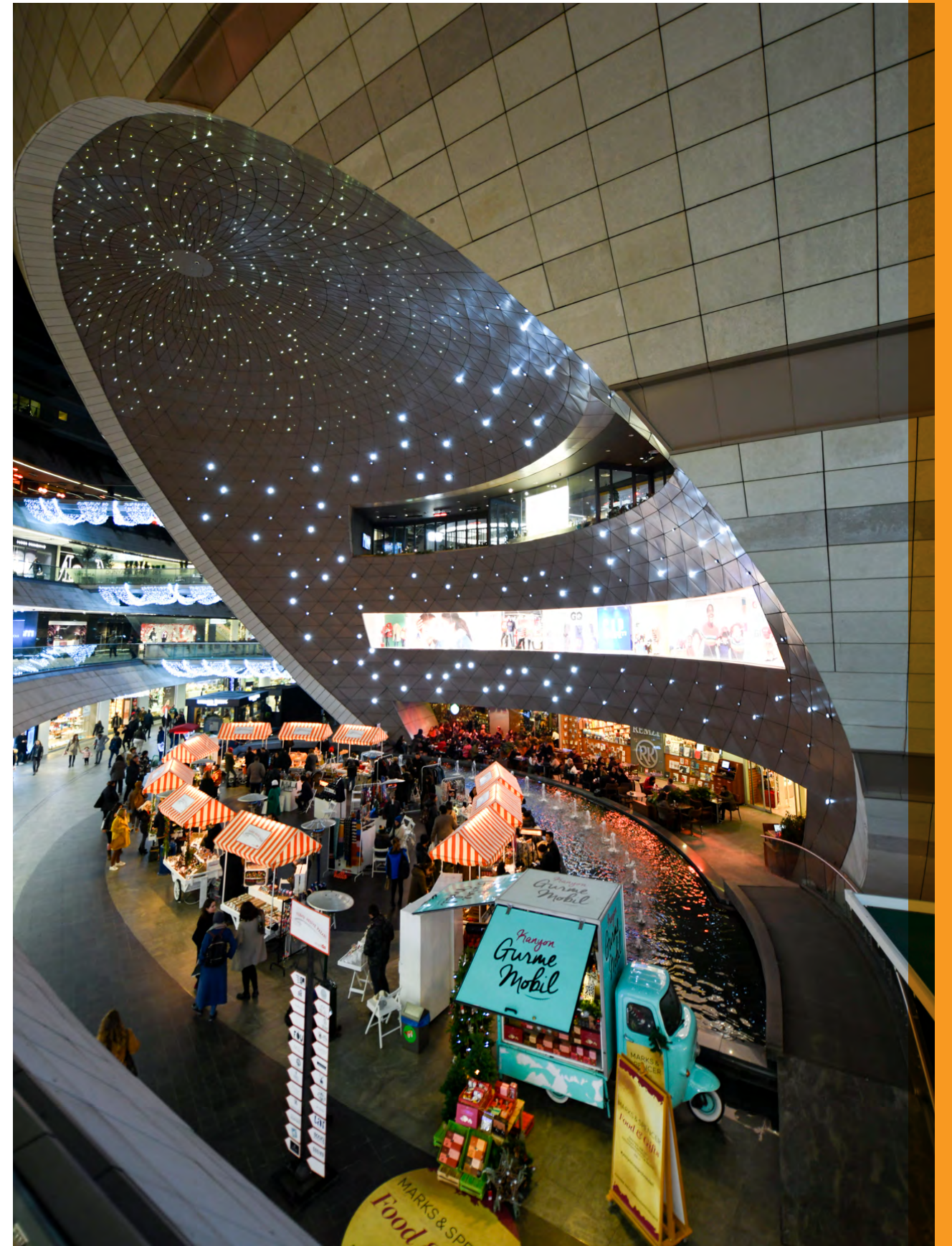
Kanyon is the Eczacıbaşı Group's first and largest commercial property and a joint venture with the İş Real Estate Investment Trust. It is a mixed-use property comprising a 26-story office tower, 179 residential apartments, and 40 thousand square meters of rental space for shopping and leisure activities. Kanyon offers 140 brands, 27 restaurants and cafes, a luxury department store, gourmet supermarket, sports center and multiplex cinema.

Kanyon has a unique architectural design that sets it apart from other shopping centers and attracts visitors: Its canyon-like structure features wide open-air spaces and outdoor walkways so that people enjoy fresh air, greenery and bird sounds as they stroll past fountains, shops and restaurants. Thanks to its convenient location next to the metro and Bosphorus bridges, Kanyon is also commuter friendly. These features underpin our vision of creating visitor experiences that are surprising, enjoyable

and memorable and that meet or exceed expectations.

One of the ways that our property management company, Kanyon Management and Marketing, creates fulfilling shopping experiences is by ensuring that Kanyon's retail mix offers premium or innovative brands in a variety of categories. Many of these brands are global and have chosen Kanyon for their first store, such as Lego, Daniel Wellington, Cole Haan and, from the very start, Harvey Nichols, our anchor store. The same holds true for our restaurants: Our concept restaurants designed by famous chefs include Nusret, Zula, Serafina and Suvla. We also have a Gurme Mobil that features a different up-and-coming eatery brand every month.

To this enticing mix of shopping and gastronomy we have introduced a dynamic program of culture and art events that reinforce Kanyon as a destination point for leisure, recreation and socializing as well as shopping. Some of these events are tied to commercial venues, like film galas at our multiplex cinema and book signing events at the D&R bookstore. Others we organize ourselves, like outdoor concerts,







tango nights, well-being weekends, organic food markets, street food events, games and storytelling for children, and much more.

To ensure that the experiences we offer visitors match their values and expectations, we meet with people from our target customer groups to understand them better. That's no easy job: according to the latest research, there will soon be six active generations of consumers in the market, ranging from those born before 1945 to those born after 2017. The research also suggests that young urban shoppers are significantly changing how they consume. They want brands that share their values, that are trustworthy and dynamic, and that offer personalized marketing and sales experiences. Perhaps more importantly, they are spending less on products and more on experiences.

One way that we are preparing for these changes is by developing our already strong presence in digital and online platforms. Our star in this area is the Kanyon Mobile App and its first-of-a-kind chatbot, which answers questions about Kanyon stores, restaurants, and events. People who use the app also receive surprise gifts and discounts and a direct link to Kanyon Radio. We are also developing dynamic digital marketing strategies that reach out to visitors, orient them, and ensure they have the best possible experience at Kanyon.

A second way is by communicating our commitment to sustainability more forcefully. From the outset, aligning Kanyon with the environment and health of our community has been our true north. Between 2014 and 2019, for example, we implemented a large number of operational changes that enabled us to reduce Kanyon's greenhouse gas emissions by 26 percent.

*By continually searching for ways to minimize our environmental footprint, Kanyon became the first commercial property in Turkey to receive an "Outstanding" rating by BREEAM for in-use buildings. We have also worked hard to ensure that Kanyon has a healthy environment for visitors, from designing spaces with high levels of natural light and fresh air, to continually monitoring the air quality of indoor environments.*

## INVESTMENT OFFICE - E-KART

***E-Kart Electronic Card Systems, the Eczacıbaşı Group's equal share joint venture with Giesecke and Devrient is the leading supplier of smart card based digital security systems in Turkey.***

E-Kart Electronic Card Systems, the Eczacıbaşı Group's equal share joint venture with Giesecke and Devrient is the leading supplier of smart card based digital security systems in Turkey. We are the principal supplier in Turkey of GSM, banking cards and the new electronic ID cards for Turkey's biometric ID card system. In all of these areas, we offer both our expertise and comprehensive certification to produce a wide range of cards and personalization solutions as well as advanced solutions for secure products, software, and trusted services.





# Investing in the Future

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## INNOVATION & ENTREPRENEURSHIP

*The Eczacıbaşı Group has merged the coordination of innovation and entrepreneurship activities in a new Innovation and Entrepreneurship Office (IEO) that will focus on creating sustainable, multi-stakeholder solutions for global human-centered problems.*

The Eczacıbaşı Group has merged the coordination of innovation and entrepreneurship activities in a new Innovation and Entrepreneurship Office (IEO) that will focus on creating sustainable, multi-stakeholder solutions for global human-centered problems in the ecosystems that the Group supports, operates, and invests in. By facilitating innovation practices in these ecosystems and supporting entrepreneurial ventures within and without Group companies, IEO aims to ensure that the Eczacıbaşı Group is aligned with its guiding purpose.

### New solutions that transform lifestyle habits for the good of all

In 2019, IEO led a three-month collaboration with numerous stakeholders aimed at defining the purpose and focus of innovation in the Eczacıbaşı Group. We met with more than 160 stakeholders through face to face interviews and four workshops. We made a deep dive analysis of Eczacıbaşı's history and shared narrative, and studied paradigm shifts in relation to the Group's mission as a pioneer of

modern, healthy and high-quality living. Looking at the themes that underpinned the Eczacıbaşı Group's funding and subsequent growth, we identified that the Eczacıbaşı Group's investments to date have sought to enable individuals to acquire lifestyles adapted to the times, thereby contributing to the transformation and improvement of society. Our innovation statement, which we hope will inspire new visions for the Group, intersects this Core that brought us to the present with the role we want to assume in the future, unbounded by sector and geography: "New solutions that transform lifestyle habits for the good of all."

### A purpose-led approach to innovation and entrepreneurship

With this core-driven innovation framework in mind, the IEO plans to be at the center of the Eczacıbaşı Group's innovation culture and practice. In all our work we aim to inspire a purpose-led approach to doing business that emphasizes multi-stakeholder value creation. We are focused on

promoting innovation throughout the Group through leadership training and innovation-specific KPIs, culture transforming projects, and new management practices.

We are working with Eczacıbaşı Group leadership to prioritize innovation practices in each Eczacıbaşı Group company through targeted workshops that support them in incorporating the new innovation statement into their strategic operations and everyday practice. We are measuring and evaluating innovation through specific KPIs for each of these Group companies to ensure that they are aligned with the Group's innovation statement and are making progress towards their guiding purpose. We are taking steps to ensure that skills that are key for innovation, especially creativity and collaboration skills, are developed across all organizations within the Group. Additionally, we are continuing to look for ways to bring internal and external stakeholders together, equipping them with the tools and mechanisms they need for transformative collaboration in our core ecosystems.

### Transformative collaboration between internal and external stakeholders

Ecosystems have a key role in our innovation and entrepreneurship activities. We are building and nurturing our innovation ecosystem through end-to-end solutions such as intrapreneurship and entrepreneurship programs, open innovation challenges, and corporate venture capital.

The intrapreneurship program aims to find solutions to human-centered business challenges through interdisciplinary teams that work from the generation of ideas right through to their prototypes. The resulting product or service might be implemented by the Group or launched as a spin-off venture.

The first intrapreneurship program in the Eczacıbaşı Group took place in 2019 in collaboration with the Digital Transformation Office. We are following this initiative with several new intrapreneurship programs aimed at transforming the innovation potential of the Group into initiatives that create multi-stakeholder value in our core ecosystems.

### New corporate venture arm: Eczacıbaşı Momentum

Eczacıbaşı Momentum is the Group's corporate venture capital arm. Established in late 2019, Eczacıbaşı Momentum is built on the core principles of integrity, sustainability and accessibility, and partners with companies that shape the new normal of modern life, focusing on well being, consumption and home-living. During its first half year of

operation, Eczacıbaşı Momentum invested in three venture companies and a venture capital fund; our goal is to invest US\$30 million over the next five years as we continue to partner with funds and startups who can facilitate the path to fulfilling our corporate purpose going forward.

*"Our innovation statement, which we hope will inspire new visions for the Group, intersects the core that brought us to the present with the role we want to assume in the future, unbounded by sector or geography. It is: New solutions that transform lifestyle habits for the good of all."*

**Emre Eczacıbaşı**  
Innovation and Entrepreneurship Coordinator



# DIGITAL TRANSFORMATION

*Eczacıbaşı is making swift progress on its digital transformation journey, which aims to strengthen the Group's competitive advantage in the current environment of uncertainty and rapid change and prepare its operations for the future.*

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## Why Digital Transformation is Essential

Technological advances have led to the emergence of new business models and new ways of doing business by creating faster and cheaper access to information and customers. This situation offers huge opportunities for companies that make digital tools part of the daily activities that advance their main strategies. We believe digital transformation is essential in order to prepare the Eczacıbaşı Group for the future and ensure that it maintains its competitive edge.

## Our Digital Transformation Vision

The Eczacıbaşı Group's digital transformation vision is to add value to the lives of customers and business partners by providing innovative, advantageous and faster solutions that respond to their rapidly changing demands.

## Main Areas of Focus and Projects Completed

The digital transformation journey we started in 2018 is making rapid progress with respect to the main strategies of business divisions. Projects on the roadmap have begun to yield concrete results and gains and have given rise to new ideas and projects.

In line with changing priorities, we are updating road maps and adding new projects. As of end-2019, we had 125 projects on our three-year roadmap, 42 (32 percent) of which we had completed. Our ongoing digital transformation activities focus on four broad objectives:

### Understanding the Consumer

Our top priority is understanding the experience journey of consumers, creating value from consumer data and insights, and ensuring that we target the right product, service and communication for consumer needs.

The VitrA Design application, for example, enables consumers to choose the bathroom type that best fits their needs, then design the entire bathroom one or more

times to compare alternatives. Consumers can also save a basket of the products they need for their preferred design to show customer representatives at VitrA stores or authorized dealers.

### Creating Value from Data

Our aim is to achieve an increase in productivity by collecting, analyzing and giving meaning to data at every stage of the value chain, and by undertaking projects that combine data modelling technologies and automation in business processes for predictive maintenance, estimation, and optimization.

Eczacıbaşı Consumer Products, for example, has implemented an IoT project called ConnecTissue at its tissue paper plants in Yalova and Manisa which reduces the likelihood of unplanned production halts through predictive maintenance. The project increased the productivity of equipment and led to a reduction in production and maintenance costs. ConnecTissue won the IDC Smart Manufacturing Award in the "IoT in Production" category.

Esan's "Kokpit" project at the Balya processing plant created an IoT communication structure that

collects data on the workload of equipment and personnel in real time. By applying optimization algorithms to the data, Esan has improved its productivity, reduced its costs and raised its production capacity, leading to an increase in income.

### Achieving a Change in Culture

We are undertaking a variety of activities to create awareness about digital transformation, accelerate the process of transformation, help employees develop or acquire the required competencies, and change the ways we do business in order to create a more flexible and agile corporate culture.

### Common Activities:

- Subjects that require digital competencies, such as digital marketing, Industry 4.0 and data analytics, are followed up by committees of people employed in these functions in different business units. The committees monitor digital developments and find examples of best practices within the Group that can be scaled up as well as best practices outside of the Group that are relevant and applicable to our businesses.

### Synergy & Coordination:

- Group-wide events where companies share their digital projects are useful for creating synergy between departments and companies. In addition to our day-long "Digitaliz" event, which looks at all topics related to digital transformation, we organize events on digital marketing, Industry 4.0, digital finance, and digital HR. Employees from different companies that work in these areas come together to share and discuss internal and external examples of best practices.

### Competency Development:

We have developed online training programs to improve the digital competencies of employees:

- With Coursera, we prepared a digital curriculum that addresses the common competency needs of teams involved in digital projects.
- The Eczacıbaşı Group was the first in Turkey to offer professional employees the "Digital Fitness" app, a digital development program that people can customize to their personal preferences and needs to design a personal development journey.
- By providing agility training to employees in different business units, we are encouraging people to consider diverse ways and methods of doing business.

### Transition to an Agile Culture:

Many of the projects underway have adopted an agile approach. From the development of an idea through to process improvement and product development, and even in the testing of new business models, teams have become accustomed to using the agility methodology to ensure that they are focused on their targets.

### Testing New Business Models

Efforts are underway to plant the seeds of future business models and to evaluate opportunities for collaboration and investment. All activities of this kind are carried out jointly with the Innovation and Entrepreneurship team.

*Technological advances have led to the emergence of new business models and new ways of doing business by creating faster and cheaper access to information and customers. We believe digital transformation is essential in order to prepare the Eczacıbaşı Group for the future and ensure that it maintains its competitive edge.*

**Esra Eczacıbaşı Coşkun**  
Digital Transformation Coordinator

In this world of uncertainty and rapid change, even if it is hard to foresee the business models of five to ten years from now, preparing for these new models will give companies a competitive advantage. Accordingly, we have begun to consider solutions to future problems and have established mechanisms for supporting initiatives of this kind in our core business fields.

To ensure that it has an active role in the startup ecosystem, the Eczacıbaşı Group established Eczacıbaşı Momentum Technology Investments in 2019. Eczacıbaşı Momentum is methodically looking for local and international startups for strategic partnerships or investments and signed several promising agreements in its first year of operation.

Last year, the Eczacıbaşı Group also launched a pilot internal entrepreneurship program and the first project picked for the program was a digital project. In upcoming periods, we plan to extend the entrepreneurship program throughout the Group to provide financial and management support for potential business ideas.

The Eczacıbaşı Group's digital transformation efforts aim to create sustainable success that will carry the Group to its 100<sup>th</sup> anniversary and beyond.



# SUSTAINABILITY

## Environmental Indicators

### ENERGY CONSUMPTION

Total

# 1,653

thousand MWh

2.40

MWh

Per ton of output\*



### CARBON EMISSIONS

Total

# 461

thousand tons

0.61

tons

Per ton of output\*



### WATER CONSUMPTION

Total

# 4,139

thousand m<sup>3</sup>

3.94

m<sup>3</sup>

Per ton of output\*



### WASTE DISPOSED\*

Total

# 52

thousand tons

64%

Share of recycled waste\*



## Social Indicators

### TOTAL SHARE OF WOMEN PROFESSIONALS (TURKEY)

# 34.3%



### WOMEN IN NEW RECRUITS (TURKEY)

# 40%



### INJURY RATE\*\*

# 0.98



### TRAINING HOURS PER TALENT\*\*\*

# 24



\*Excludes Esan Eczacıbaşı Raw Materials

\*\* Injury rate=Number of occupational accidents causing days lost\*200,000/Total hours worked

\*\*\* Employees in leadership programs

The Eczacıbaşı Group embraces the concept of sustainable development as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (Brundtland report, 1987) and is committed to incorporating this concept into every business process. For us, this means reducing the environmental impact of our operations, products and services and enhancing the well-being of our employees, customers, partners and communities while ensuring the long-term profitability of our businesses.

A UN Global Compact signatory, the Eczacıbaşı Group has been reporting on its sustainability performance since 2008. Since 2009, PricewaterhouseCoopers (PwC) has provided limited assurance on the Group's consolidated energy consumption figures for operations in Turkey.

In 2016, we extended this limited assurance to water consumption, occupational health and safety, gender equality, and training hours per talent. In 2017, we included waste disposed and share of recycled waste, and in 2018, product tonnage. As a result, we are now obtaining limited assurance of all our sustainability key performance indicators on an annual basis.

The Eczacıbaşı Group voluntarily sets four-year performance targets for reducing energy and water consumption, improving occupational health and safety, and advancing gender balance in every one of its operations.

For the period 2017-2020, the Group aims to:

- reduce per-ton energy and water consumption by 4 percent,
- lower the injury rate towards zero,
- raise the share of women in recruitment to 50 percent, in overall professional employment to 40 percent and in management to 35 percent.

## ENERGY

Eczacıbaşı Group companies are continually developing projects aimed at reducing their energy consumption. Per-ton energy savings through projects carried out in the Group's production plants in 2019 were equivalent to the amount of electricity 16,800 families might consume in an average year.

## WATER

The Eczacıbaşı Group is committed to reducing the water consumption of households and establishments using its products as well as the water consumed by its industrial operations. In 2019, our operations achieved per-ton water savings equivalent to the amount of water that 780 average families of four might consume over the course of one year.

## OCCUPATIONAL HEALTH AND SAFETY

The Eczacıbaşı Group's occupational health and safety goal is 0 accidents. Since 2013, we have lowered the Group's accident rate from 3.51 to just under 1.00.

## EQUAL OPPORTUNITY

The Eczacıbaşı Group is implementing a growing number of measures to achieve its equal opportunity targets, including gender-blind CVs for recruitment, childcare support, and home office workdays.

## PLASTICS PLEDGE

The Eczacıbaşı Group is very concerned about plastic waste and is looking for alternatives to plastic in order to reduce its environmental footprint from plastics. Starting with the elimination of single-use plastic at Group companies, we are carrying out projects aimed at reducing and even eliminating plastic use in our products and packaging.

In 2019, the Eczacıbaşı Group joined Turkey's “Business World Plastic Initiative” to combat plastic waste and pollution. The initiative was established by three NGOs that the Group is actively involved in: Global Compact Turkey, the Business Council for Sustainable Development-Turkey (SKD), and the Turkish Industry and Business Association (TÜSİAD). Signatories of the new initiative must set targets related to plastic use and waste and provide transparent feedback on their performance every year.



# Contributing to Society

- 52 Arts & Culture
- 56 Science & Technology
- 58 Sports
- 60 Hygiene
- 61 Volunteerism





# Istanbul Foundation for Culture and Arts



**İKSVA organizes the Istanbul Festivals of Music, Film, Theatre and Jazz, as well as the Istanbul Biennial, the Istanbul Design Biennial, Leyla Gencer Voice Competition, autumn film week Filmekimi, and one-off events throughout the year.**

The Eczacıbaşı Group is the founding sponsor of the Istanbul Foundation for Culture and Arts (İKSVA), established in 1973 on the initiative of Dr. Nejat F. Eczacıbaşı.

İKSVA organizes the Istanbul Festivals of Music, Film, Theatre

and Jazz, as well as the Istanbul Biennial, the Istanbul Design Biennial, Leyla Gencer Voice Competition, autumn film week Filmekimi, and one-off events throughout the year.

It is also in charge of the Pavilion of Turkey at the International Art and Architecture Exhibitions of la Biennale di Venezia and coordinates an artist residency program at Cite International des Arts, France.

Aside from cultural and artistic events, İKSVA promotes artistic and cultural production through awards, the commissioning of works, and participation in international and

local co-productions; it also carries out studies aimed at supporting policy decisions involving culture and the arts.

In addition to direct sponsorship of the Foundation, many Group companies and brands contribute to İKSVA events and projects.

## İKSVA Alt Kat

In March 2019, İKSVA opened a new space aimed at improving young people's access to and participation in culture and art events: the İKSVA Alt Kat Learning and Interaction Space.

Located on the basement floor of the Nejat Eczacıbaşı building, where İKSVA has its offices, İKSVA Alt Kat offers free events and workshops in a variety of disciplines all year long with the support of the Istanbul Development Agency (İSTKA).

İKSVA Alt Kat aims to reach children, teens and groups with limited access to culture and the arts and to increase communication between culture professionals, NGO employees, artists, educators, and audiences.



# Istanbul Modern



The Eczacıbaşı Group is the founding sponsor of the Istanbul Museum of Modern Art, Turkey's first private museum of modern and contemporary art. Established in 2004, Istanbul Modern is committed to advancing the public's appreciation of modern and contemporary art, contributing to the production of new work, and sharing Turkey's artistic creativity and cultural identity with global audiences. To this end, the museum hosts permanent and temporary exhibitions of paintings, sculpture, photography and new media, as well as educational programs, cinema programs, a research library, cafe, and gift store.

Through a wide variety of events, the museum aims to encourage visitors of all ages and segments of society to engage actively with the arts. To date, Istanbul Modern has received more than eight million visitors, organized 137 exhibitions – including 17 abroad – and introduced more than 800 thousand children and adults to its educational programs and events.

In May 2018, Istanbul Modern moved from its original site in Karaköy, now the center of Istanbul's new Galataport project, to a temporary space in the historical Beyoğlu neighborhood. The museum will remain there for

three years while a new building, designed by the celebrated architect Renzo Piano, is constructed at its original site.

## CANAN TOLON: "YOU TELL ME"

**The Eczacıbaşı Group was the sponsor of Istanbul Modern's final exhibition in 2019, "Canan Tolon: You Tell Me". The exhibition invited viewers to rethink nature and the environment as well as architecture and culture through a cross section of the artist's work from the 1980s to the present.**





# Eczacıbaşı Culture&Art Card



In 2017, the Eczacıbaşı Group became the main sponsor of a new İKSV project called the İKSV Culture&Art Card. The goal of the Eczacıbaşı Culture&Art Card, as it is now called, is to increase university students' access to culture and art events in Istanbul while also encouraging young people to take a greater interest in these activities.

Eczacıbaşı Culture&Art Cards have prepaid credit that cardholders can use to purchase tickets to İKSV events or visit Istanbul Modern. To apply for the card, university students aged 18-25 enter their names in a friendly lottery; to date, 6,000 lucky students have received this card.

In addition to attending İKSV events, cardholders can meet with artists, attend talks and events featuring festival directors, artists, musicians and performers. Cardholders can also use their card for discounts at Istanbul Modern Cafe and Istanbul Modern Shop as well as for İKSV publications and products.

In 2019, Eczacıbaşı Group Chairman Bülent Eczacıbaşı pledged the revenues earned from the sale of his new book, *İşim Gücüm Budur Benim* (A Rip in the Sea), to fund

an additional 1,000 cards, doubling the reach to 2,000 students per year.

**The goal of the Eczacıbaşı Culture&Art Card is to increase university students' access to culture and art events in Istanbul while also encouraging young people to take a greater interest in these activities.**



# Dr. Nejat F. Eczacıbaşı Foundation Music Scholarships

Dr. NEJAT F.  
ECZACIBAŞI  
VAKFI

The Dr. Nejat F. Eczacıbaşı Foundation provides scholarships to outstanding young artists in the field of music who are pursuing graduate musical studies abroad.

To date, the Foundation has supported 138 musicians studying a wide range of instruments as well as orchestration, direction and composition.

Fifteen young musicians received Dr. Nejat F. Eczacıbaşı Music Scholarships for the academic year 2019-2020.



*"Music is my life, I feel like it is my reason for being. Music is the center of all my thoughts. The very existence of music is a source of inspiration for me."*

Aslıhan Keçebaşoğlu,  
University of Arts Helsinki  
Sibelius Academy  
(Composition)

*"For me, music is a refuge as much as a profession. Whenever I'm unable to express myself with words, music is there for me. Music has changed my outlook on the world, taught me to be patient, and become a part of my identity. My happiest moments are when I'm performing works by prominent Turkish composers for international audiences."*

Ezgi Göktürk, University of  
Arts Helsinki Sibelius Academy  
(Piano)

*"After successfully completing my graduate studies, I hope to represent my country as best as possible as a soloist and orchestra musician playing for international audiences. In the future, I hope to establish a platform where I can share everything I learned with young musicians."*

Deniz Esen, Conservatorio  
Statale di Musica "Giuseppe  
Verdi" di Torino (Harp)



# Dr. Nejat F. Eczacıbaşı Medical Awards



Dr. Nejat F. Eczacıbaşı earnestly believed that the business world had a responsibility to support scientific research. As a business leader, he sought to contribute to the development of scientific research in Turkey and productive dialogue between the business world and academic institutions.

In 1959, Dr. Nejat F. Eczacıbaşı established an award program to recognize, support, and reward high-caliber medical research in Turkey. Presented every two years, the Dr. Nejat F. Eczacıbaşı Medical Awards have to date given out 34 Medical Science Awards, 43 Medical Incentive Awards, 17 Medical Students Project Awards and 178 Medical Research Awards for research projects.

In 2019, on the award program's 60<sup>th</sup> anniversary, the Dr. Nejat F. Eczacıbaşı Foundation presented the Eczacıbaşı Medical Award of Honor to Prof. Dr. Marsel Mesulam for his outstanding contributions to medical science and tremendous support of academicians and scientific events in Turkey. A graduate of Robert College and Harvard Medical School, Professor Mesulam is recognized worldwide as one of the leading authorities on behavioral neurology and the biology of dementia, with ground-

breaking findings in both fields. Professor Mesulam is pursuing his academic research at the Faculty of Medicine of Northwestern University in Chicago, where he is Director of the Mesulam Center for Cognitive Neurology and Alzheimer's Disease and Chief of the Behavioral Neurology Unit in the Department of Neurology.

Prof. Dr. Ahmet Höke, a graduate of Hacettepe University's Faculty of Medicine and Director of the Neuromuscular Division at John Hopkins Medicine, received the 2019 Medical Science Award for his peripheral neuropathy research focused on axon degeneration, Schwann cells in the peripheral nervous system, and the regeneration of peripheral nerves. Dr. Höke is also a board member of the American Neurological Association and Peripheral Nerve Society, and Vice President of the Toxic Neuropathy Consortium.

Other award recipients were Associate Professors Dr. Uğur Canpolat and Dr. Ceyda Açılan Ayhan and university graduate Sena Alptekin. Assoc. Prof. Dr. Uğur Canpolat from the Department of Cardiology of Hacettepe University's Faculty of Medicine received the Medical Incentive Award, and Assoc. Prof. Dr. Ceyda

Açılan Ayhan of Koç University's School of Medicine received the Medical Research Award. Sena Alptekin, a graduate of Dokuz Eylül University's Faculty of Medicine, received the Medical Student Project Award.

***"Passion for scientific research is the creative force shaping our future."***

***Dr. Nejat F. Eczacıbaşı***



# Turkish Informatics Foundation



The Eczacıbaşı Group is co-founder and corporate sponsor of the Turkish Informatics Foundation (TBV), established in 1995 to assist in Turkey's transformation into an information-based society.

In addition to infrastructure development, TBV organizes economic and social activities that contribute to raising the share of information and communication technologies in Turkey's economy. These include informing the public about local and global developments in these fields, organizing activities that increase digital literacy, and providing the infrastructure needed to ensure the secure and free movement and sharing of information. TBV also

promotes the use of international quality standards and educational methodologies and tools and supports the establishment of technoparks to encourage R&D activities and university-industry cooperation.

The Eczacıbaşı Group is also the main sponsor of TBV's KOD Awards, a competition for creators of digital educational games that promote math and science learning. The first of its kind in Turkey, the competition is open to anyone who has created a digital game, or an idea for a digital game, that contributes to math and science learning at the primary school, middle school and high school levels. In addition

to motivating professionals and amateur game developers to develop these important learning tools, the awards aim to highlight the great contribution that information technologies can make to education and inspire new generations to enter this field. TBV held its second annual KOD Awards in 2019.

***"Education is a basic need and play is a basic need. In nature, these two happen at the same time. Games emerged as teaching experiences. But humanity then separated the two. "***

***Faruk Eczacıbaşı  
TBV President***





# Eczacıbaşı Sports Club



The Eczacıbaşı Sports Club was established in 1966 in order to contribute to the development of sports in Turkey. It is the first professional sports club in Turkey dedicated solely to women's volleyball, and is widely considered to be the pioneer of this sport in Turkey as well as one of the top volleyball clubs in Europe today.

The Eczacıbaşı Sports Club is home to the Eczacıbaşı Vitro Women's Volleyball Team, the record-holder of Turkey's National Championships and first back-to-back Champion of the FIVB Women's Club World Championship (2015 and 2016). Since its establishment in 1966, the team has won 28 National Championships, nine National Cups and played in 12 European Cup Finals, winning the "European Cup Winners' Cup" in 1999. In addition

to its A team, the Club has three junior teams that have contributed players over the years to the A team, other first division teams and the Turkish National Volleyball Team. Collectively, these teams have won more than 40 national championships. In 2019, Eczacıbaşı Vitro won the silver medal in the FIVB World Clubs Championship in Shaoxing, China.

In 2018, the Club became the first sports club worldwide to receive the Women and Sport World Trophy of the International Olympic Committee (IOC) for its long-running efforts to empower women through sports, raise their presence at every level of sports, and encourage thousands of young girls to take up sports by teaching them volleyball.

The award reflects the achievements of the Future Spike volleyball school program that the Club initiated in 2016 in collaboration with ES Volleyball. In addition to encouraging thousands of 6 to 14-year-old girls to take up volleyball or another sport, the program aims to empower these girls by contributing to their sense of self-worth and self-confidence. Future Spike also trains the coaches of the future.

During the 2019-2020 season, Future Spike had 20 campuses in eight provinces. Since the start of the program, 8,500 girls have participated in the program, 4,600 of them from cities outside of Istanbul.

With the support of a grant provided by the IOC to winners of the Women and Sport World Trophy, the Eczacıbaşı Sports Club has developed a training program to help girls develop their sense of self-awareness, self-confidence and realize their full potential both personally and as athletes. In 2019, the Club organized this training for 891 girls between the ages of 12 and 18, for 775 parents of girls between the ages of 6 and 12, and for 99 volleyball coaches training girls in both age groups.





# Eczacıbaşı Hygiene Project



The Eczacıbaşı Hygiene Project is an international award-winning project that aims to enhance the physical, intellectual and emotional environments of boarding schools serving students from rural and low-income regions in Turkey.

Spearheaded by three Group brands – VitrA, Artema, and Selpak – this Group-wide social responsibility project is renovating the bathrooms and showers of Regional Boarding School dormitories and school buildings with VitrA and Artema products, ensuring that students are aware of healthy personal care and hygiene practices through the Selpak Personal Hygiene Program, and organizing projects that

enrich students' emotional and intellectual environments with the help of Eczacıbaşı Volunteers. It is also supplying schools with economical cleaning materials and basic supplies through Eczacıbaşı Profesyonel, Eczacıbaşı Consumer Products' B2B brand.

Every Eczacıbaşı Group employee can contribute to the project by joining one of Eczacıbaşı Volunteers' many initiatives focused on culture and art, science, technology and creativity. A key partner in the project is the Ministry of Education, which is determining the neediest schools and ensuring that they have the required plumbing infrastructure.

As of end-2019, more than 19,000 students at 55 schools around Turkey have benefited from the Eczacıbaşı Hygiene Project. The goal is to extend the project to 60 schools in all by 2020 according to the latest agreement between the Eczacıbaşı Group and the Ministry of Education.

***As of end-2019, more than 19,000 students at 55 schools around Turkey had benefited from the Eczacıbaşı Hygiene Project.***



# Eczacıbaşı Volunteers



Eczacıbaşı Volunteers is a volunteer initiative established by Group employees in 2007 to carry out projects that benefit children. In principle, Eczacıbaşı Volunteers focus on projects that complement the social responsibility projects of Group companies and contribute to children's mental, physical and emotional wellbeing.

In 2019, with the participation of more than 250 employees, Eczacıbaşı Volunteers carried out 70 projects that touched the lives of more than 15 thousand schoolchildren. Some of these projects supported science and technology learning and were

organized jointly with NGOs that encourage students to develop innovation skills, such as Young Guru Academy and Kodluyoruz.

Other projects support art and culture. Eczacıbaşı Volunteers arrange for children to attend cultural events at İKSV Alt Kat for schoolchildren from underserved schools and visit exhibitions at Istanbul Modern. They also establish music rooms at schools around Turkey, focusing primarily on regional boarding schools in the Eczacıbaşı Hygiene Project.

In 2019, Eczacıbaşı Volunteers began a mentoring project for

secondary school students where volunteers talk about what they studied at university, introduce students to their professions, and answer questions about their career path.

***In 2019, with the participation of more than 250 employees, Eczacıbaşı Volunteers carried out 70 projects that touched the lives of more than 15 thousand schoolchildren.***





# LIST OF ECZACIBAŞI GROUP COMPANIES

(As of April 2020)

	Share of Eczacıbaşı Group
ECZACIBAŞI HOLDING CO.	100.00
BUILDING PRODUCTS - BATH	
Eczacıbaşı Building Products Inc. Co.	100.00
Burgbad AG	100.00
Burgbad GmbH	100.00
Burgbad France SAS	100.00
VitrA UK Ltd.	100.00
VitrA Bad GmbH	100.00
VitrA USA Inc. Co.	100.00
VitrA Bathroom Products LLC	100.00
VitrA Bathrooms India Private Limited	100.00
Eczacıbaşı Building Products Europe GmbH	100.00
İntema Building Materials Marketing and Sales Inc. Co.	85.90
İntema Yaşam Home and Kitchen Products Marketing Inc. Co.	85.90
Eczacıbaşı Building Products LLC	100.00
BUILDING PRODUCTS - TILES	
VitrA Tiles Inc. Co.	100.00
VitrA Tiles LLC	100.00
VitrA Fliesen GmbH&Co.KG	100.00
V&B Flisen GmbH	97.71
CONSUMER PRODUCTS	
Eczacıbaşı Consumer Products Co.	100.00
Eczacıbaşı Consumer Products Maroc	100.00
İpek Kağıt Central Asia LLP.	100.00
HEALTHCARE	
Eczacıbaşı Pharmaceuticals Marketing Co.	100.00
Eczacıbaşı-Monrol Nuclear Products Co.	84.00
Monrol Bulgaria Ltd.	84.00
Monrol MENA Ltd.	84.00
Monrol Gulf DMCC	84.00
S.C Monrol Europe SRL.	84.00
Radiopharma Egypt S.A.E.	84.00
NATURAL RESOURCES	
Esan Eczacıbaşı Industrial Raw Materials Co.	100.00
Esan Italia Minerals SRL.	100.00
INVESTMENT OFFICE	
Ekom Eczacıbaşı Foreign Trade Co.	100.00
Eczacıbaşı Investment Holding Co.	81.57
Eczacıbaşı Pharmaceutical and Industrial Investment Co.	80.29
Eczacıbaşı Information and Communication Technologies Co.	100.00
E-Kart Electronic Card Systems Co.	50.00
Eczacıbaşı Insurance Agency Co.	100.00
Kanyon Management and Marketing Ltd.	50.00
Eczacıbaşı Property Development and Investment Co.	100.00
Eczacıbaşı Medical and Cosmetic Products Co.	100.00
Eczacıbaşı Momentum Technology Investment Co.	100.00

# CONTACT NAMES AND ADDRESSES

## Eczacıbaşı Holding Co.

### Chairman

Bülent Eczacıbaşı

### Chief Financial Officer

Seyfettin Sarıçam

### Vice Chairman

Faruk Eczacıbaşı

### Chief Information Officer

Gürkan Papila

### CEO, Eczacıbaşı Group

Atalay M. Gümrah

### Chief Human Resources Officer

Ata Selçuk

### Chief Audit Executive

M. Sacit Basmacı

### Chief Investment Officer

Bülent Kozlu

### CEO, Eczacıbaşı Building Products

Özgen Özkan

### Innovation and Entrepreneurship Coordinator

Emre Eczacıbaşı

### CEO, VitrA Tiles

Hasan Pehlivan

### Digital Transformation Coordinator

Esra Eczacıbaşı Coşkun

### CEO, Eczacıbaşı Consumer Products

Alp Günvaran

### Corporate Communications Director

İlkay Akalın

### CEO, Esan

Serpil Demirel

### Media Relations Director

Cem Tanrıkkılıcı

### Acting General Manager

Eczacıbaşı Pharmaceuticals Marketing

Müge Satır

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Fax: +(90 212) 371 71 10

[www.eczacibasi.com.tr](http://www.eczacibasi.com.tr)



## BUILDING PRODUCTS - BATH

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**Özgen Özkan**

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### Ceramic Sanitaryware Plant

4 Eylül Mah. Osman Rusçuk Cad. No: 15  
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**Fax:** +(90 228) 314 04 12

www.vitra.com.tr

### VitrA Bathroom Products, LLC

**Commercial Director: Dennis Gass**

Bolshevik settlement

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**Phone/Fax:**+7(4967)380672

### VitrA Bathroom Products, LLC (Plant)

**Commercial Director: Dennis Gass**

Bolshevik settlement, bld. 2,

Serpukhov district, Moscow region

142253 Russia

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### Faucets Plant

4 Eylül Mahallesi Necmi Soylu Cad.

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**Phone:** +(90 228) 314 07 90

**Fax:** +(90 228) 314 07 96

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### Bathroom Furniture Plant

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**Fax:** +(90 216) 581 20 90

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### Showering Area Plant

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www.vitra.com.tr

### Ceramic Tile Plant

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Bozüyük 11300 Bilecik

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**Fax:** +(90 228) 314 04 28

www.vitra.com.tr

### VitrA Tiles LCC (Plant)

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Region Moscow Region 142253 Russia

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### V&B Fliesen Merzig Plant

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### İntema Yaşam Home and Kitchen Products Marketing Inc. Co.

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### VitrA Bad GmbH

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**Fax:** +(44 1235) 750 985

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### VitrA USA Inc. Co.

**Sales Manager: Ersal Peynirci**

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### Eczacıbaşı Building Products

#### Europe GmbH

**General Manager: Özgen Özkan**

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### Eczacıbaşı Building Materials

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### VitrA Bathrooms India Private Limited

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First Floor,106, SV Road, Santa Cruz (W),

MUMBAI, Mumbai City, Maharashtra,

India, 400054

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www.vitra-india.com

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### Eczacıbaşı Consumer Products Co.

**CEO, Eczacıbaşı Consumer Products:**

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### Tissue Paper Manisa Plant

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