European Association of Flexible Polyurethane Foam Blocks Manufacturers

The Flexible Polyurethane Slabstock Industry in Turkey

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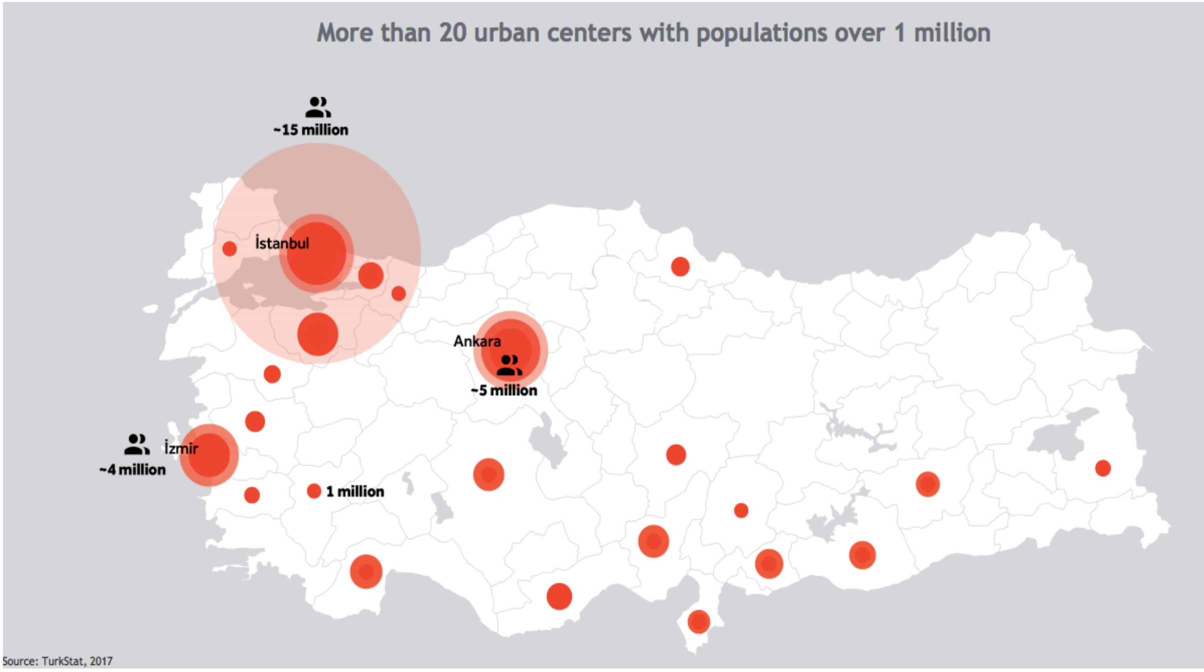
1 Introduction

Turkey is a large country of approximately 83 million people living across an area of 779,452 sq. km (300,950 square miles). The country straddles Europe and Asia, bordering Greece, Bulgaria, Armenia, Georgia, Iran, Iraq and Syria while having land and sea access to the Gulf States, Levant, North Africa as well as access across the Black Sea to Romania, Ukraine, Moldova and Russia. Turkey is subdivided into 81 provinces for administrative purposes. Each province is divided into districts, for a total of 973 districts. The coastal areas are divided into the Black Sea region, the Marmara region, the Aegean region, and the Mediterranean region. The interior areas are divided into three regions: Central Anatolia, Eastern Anatolia and Southeastern Anatolia.

Chart 1: Major Centres of Population in Turkey, 2019



Data from the Turkish Statistical Institute (TurkStat) shows that Turkey's population increased by 1.15 million during 2019. The country has a relatively young population, with a median age of 32.4 years as of the end of 2019. A reported 92.8% of Turkey's population lives in cities and district centres. The country's population density surged in 2019 by an additional 2 people per km^2 to 107. The density for Istanbul is reported to be 2,987 people per km^2.

The 10 largest cities of population are: Istanbul (~15.5million), Ankara (5.64 million), Izmir (4.37 million), Bursa (3.07 million), Antalya (2.5 million), Adana (2.2 million), Konya (2.2 million), Gaziantep (1.9 million), Mersin (1.8 million) and Kayseri (1.4 million). Since the start of the Syrian war (2011), Turkey has hosted a huge number of refugees. The country currently hosts 4 million refugees of which 3.6 million are Syrian.

2. The Flexible Polyurethane Slabstock Industry

Turkey's flexible polyurethane foam industry is the second largest in Europe, after Poland in terms of foam production, but the largest in terms of the number of foam plants. Turkey continues to expand its industry in order to meet the demands of its growing population for new furniture and bedding, footwear and textiles. It is also well placed to supply developing markets in neighbouring countries, and nearby Middle Eastern markets, as well as Europe and the United States of America. Demand is partly driven by the Turkish diaspora of 6-7 million, who remain faithful to Turkish brands.

The slabstock foam industry currently comprises of 26 continuous lines operated by 22 different companies. These plants produce from as little as 100 tonnes to 20,000 tonnes of slabstock per year. Although there are many foam producers in the country, production is dominated by Form Sünger, Safaş, Işbir Sünger and Serra Sünger that collectively account for 60% of production. The mountainous city of Kayseri, in central Anatolia, is home to the largest number of foam plants, where they supply Turkey's leading furniture and mattress manufacturers. The central location of the city provides excellent logistics from which to supply the entire country and export markets via major container ports in Mersin, Istanbul, and Izmir. Kayseri's organised industrial zone is home to 11 of the country's 20 largest furniture manufacturers with a network of over 3000 component suppliers. According to the industry association MODSAD (Mobilya sanayi İş Adamları Derneği), Kayseri is home to 400 manufacturers producing 2.5 million mattresses, and some 12,000 sofas per year. The other main centres of foam production are Ankara, Eskişehir, Istanbul and Bursa. Bursa is home to the country's automotive industry. There is only one foam plant in Southeastern Turkey, belonging to Safaş, supplying the fast-growing cities of Mersin, Adana and Antep. There are no manufacturers operating in the more sparsely populated east of the country.

Slabstock foam manufacturers include: Form Sünger, Safaş Plastik, Űrosan Sünger, Mitsan, Birlik Sünger, Kayseri Sünger, Espol Sünger, Işbir Sünger, Serra Sünger, Feba Sünger ve Mobilya, Yataş, Nova Sünger, Marfoam, Fompak, Inter Sünger, Sevinc Malzemecilik, Fomax Sünger, Gündoğdu Mobilya, Sunpor Sünger, Alper Sünger, Gelisim Sünger and IDAŞ.

Some smaller foamers, Elta Sünger, Polkan, Istanbul Malzemecilik, and Renksan are no longer producing foams due to a variety of reasons. IDAŞ, a renowned furniture brand and one of the oldest foamers in Turkey has recently been acquired by Salteks from its previous owner Polya. IDAŞ is reported to have been one of the first slabstock foam manufacturers in Turkey, having invested in a Vertifoam and Laader Berg line during the 1970s. Today the company mainly outsources its foam demand.

The majority of foam manufacturers are integrated into downstream production of furniture and mattresses and branded retail outlets. The leading foam producer Form Sünger, now part of Erciyes Anadolu Holding, produces foam for subsidiaries which include leading brands: Istikbal, Bellona, Mondi and Boyteks. Yataş and Işbir are also well- established manufacturers of furniture and mattresses with their own retail outlets.

The competitive nature of Turkey's foam industry means that manufacturers continue to look at investing in new lines, cutting equipment and storage facilities. In addition, there have been several fires in recent years damaging plants in Gebze, Tuzla, Trabzon and Arnavatköy, creating demand for new equipment. The general trend towards upstream integration is also causing several furniture manufacturers to consider investment in foam production, to secure supplies and improve margins.

Surprisingly, there are very few specialist foam convertors in Turkey, with each foamer cutting their own shapes for mattresses and furniture. Some smaller and medium sized furniture and mattress manufacturers are also reported to operate a small turntable to cut the blocks they buy from the major foamers. In-house cutting operations can reduce production costs by save 5-10%.

The chart below shows the location of Turkey's foam producing plants, most of which are aligned with major areas of population.

Chart 2 Foam Production Plants in Turkey

Typically, Turkey produces between~ 130-160Kt of slabstock per year, but this fluctuates depending upon economic conditions and raw material availability. Turkish foamers have to import nearly all their major raw materials, making them vulnerable to sudden changes in foreign exchange rates.

Table 1: Slabstock Foam Production-2015 -2020 (E)

(tonnes)	2015	2016	2017	2018	2019	2020 E
Slabstock Production	115,000	137,000	152,000	143,300	162,000	162,000
TDI Import		54,500	55,100	50,000	57,000	41,000

Source: Europur, Turkstat

According to leading manufacturers, foam densities have remained similar during the past few years, averaging 21kg/m^3. However, there has been a trend toward producing more moulded viscoelastic foam pillows that are sold to export markets. HR foam is not so popular in Turkey, so most of the foam is standard polyether foams but with high levels of hardness. In general, the Turkish population prefers very firm mattresses.

The vast majority of foam is used domestically for the production of finished goods which are sold across the country and exported. Only a very small volume of foam is reportedly exported, due to the distances between production plants and customers. Generally, each foam manufacturer has a number of regional distributors in the major cities who supply to smaller local manufacturers, a few of these distributors have cutting equipment. The introduction of compression equipment has allowed foam manufacturers to compress whole blocks to ship to export markets. This technique is also used to export mattresses.

The foam industry and the downstream markets are influenced by the country's political and economic situations. Total slabstock production in 2018 declined significantly. Although this varied from company to company, this was partly due to due to a 40% loss in the value of the Turkish Lira, inflation exceeding 20 % and a weakness in consumer spending as personal savings were devalued and disposable income was reduced.

The easing of raw material supply and reductions in their pricing combined with the country's recovery from the economic crisis of 2018, helped the foam industry to recover in 2019, growing by 9.5% to produce 162,000 tonnes. The reduction in VAT on new furniture from 18% to 8% also helped to stimulate the domestic market. The housing sector also improved as interest rates were reduced.

The weak Lira, has helped to make exports more competitive, resulting in a significant growth in furniture and mattress sales to the Middle East, North Africa, the EU and the US during the past 2 years. According to MOBSAD, an estimated 50% of furniture production was exported in 2019. The sudden growth in exports to the US has resulted in an anti-dumping case initiated by several leading mattress manufacturers.

The recovery in 2019 and strong start to sales in January and February 2020, was swiftly reversed during the Spring of 2020, as businesses were closed under lockdown rules due to Covid -19. By the beginning of May most foamers had restarted their operations. From May through to the end of August demand recovered rapidly as consumers took advantage of low interest rates on personal loans. The decline in the value of the Lira also made exports extremely attractive. One bright spot during Q2, 2020 has been the ingenuity of some foamers to make items such as laptop and smartphone cushions for home working, filter materials for face masks and other medical devices, as well as supplying mattresses for the healthcare sector in Turkey and abroad.

The rapid recovery did however not come without challenges. The further devaluation of the Lira increased the price of imported raw materials, which in addition have been in short supply for the latest months, due to a combination of unexpected high demand throughout Europe and a series of force majeures called by suppliers.

This, combined with a shortage of labour – the furniture industry was reported to be looking for 100,000 employees, according to MOBSAD – means that, since June, the furniture sector has struggled to keep up with its order books.

Overall, leading Turkish foamers expect that foam production for 2020 will not be less than in 2019 and in some cases higher, due to the unexpectedly high demand for new furniture and bedding. However, continued high levels of production are dependent upon adequate raw material supplies.

3. End-Use Markets

The main end-use markets for flexible slabstock are new upholstered furniture, mattresses, footwear, clothing and the automotive industry. Smaller volumes are used for household sponges and for the small but important reupholstery sector. The country also has a buoyant demand for trim foam for stuffing pillows, cushions, furniture and toys, as well as for high-density rebounded foams and use as as a lightweight packaging material.

Applications for rebonded foams include:

- Arab sofas (Majilis)
- Prayer mats
- Carpet underlay
- Sport mats and flooring
- Packaging
- Footwear – shoe insoles, ski boots and safety shoes
- Commercial furniture
- Mattress cores

There are a growing number of foamers that produce rebonded foam using their own trim foam to reduce or eliminate waste streams. The high prices of TDI during 2016-2019 also encouraged greater use of rebounded foam as cores in some furniture and mattress.

3.1 Upholstered furniture

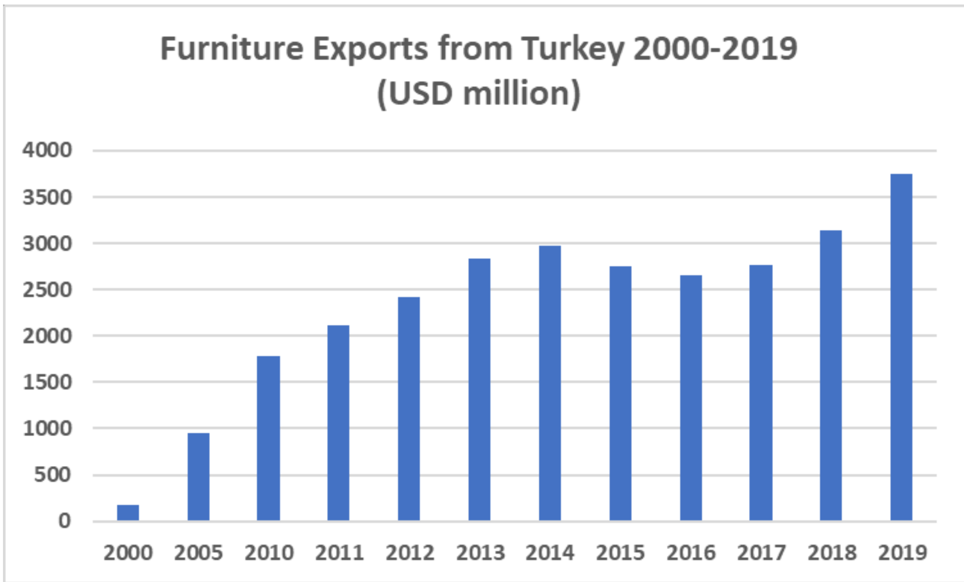
Production of upholstered furniture in terms of value has averaged USD 800 million per year over the past 7 years. However, from 2015 onwards, domestic demand has fallen sharply to less than 50% of output, causing the industry to look for opportunities in the export markets.

According to MOBSAD, the leading association of furniture manufacturers, there are almost 250,000 employees in the furniture sector, including stores, of which 200,000 people are employed directly, 10,000 are exporters and 36,000 producers. Leading manufacturing groups include Erciyes Anadolu Holding (Istikbal and Bellona), Yataş, Doğtaş, and Ipek who account for 65% of the industry's turnover.

The industry has grown continuously for the past 15 years and achieved a significant trade surplus for Turkey. More than 500 companies achieved exports USD 1 million in exports in 2019. In 2019, Turkey exported furniture valued at USD 3.5 billion and aims to increase this to USD 4.5 billion by the end of 2021 and to USD 10 billion by 2024. In 2005, exports were only worth USD 100-150 million. The new Silk Road project will also allow Turkish manufacturers to reach more customers in Asia.

Exports are an important part of the furniture industry because the Turkish population do not replace their furniture frequently, but instead keep them for years, often getting them reupholstered at local workshops. The younger generations cannot afford to replace their furniture frequently, preferring to spend their limited disposable income on other goods and services. The frequency of furniture replacement in the US and Europe is much shorter as fashions change faster, making export markets more attractive for Turkish manufacturers.

Chart 3: Furniture Exports 2000-2019 (USD million)



Source: TurkStat & MOBSAD

Turkish furniture has developed a good reputation for design and quality across the domestic market and the Middle East. This is due to closer proximity to these markets than producers in China and Southeast Asia. There are also cultural similarities in the way of doing business.

Exports to the US have also increased, as retailers look for alternatives to Chinese suppliers. Turkey is becoming a cost-effective production base for European and US furniture brands with shorter lead times than those of Asia.

Iraq, Saudi Arabia, Libya, Israel, Germany, Qatar, the UK, the UAE, France, and the US were the leading export markets for Turkish furniture makers in 2019.

It has been reported in the media that Turkish furniture manufacturers will be chosen to furnish hotels and facilities for the 2022 World Cup in Qatar. Turkish firms currently account for $14.5 billion worth of projects in Qatar, according to MOBSAD.

3.2 Mattresses

According to CSIL Milano, Turkey is ranked as the 15th largest manufacturer of mattresses worldwide, producing approximately 5 million units, valued at USD 346 million in 2019. 80% of mattresses are innerspring, with Turks preferring a firm mattress to a soft full- foam mattress. However, demand for full foam and hybrid mattresses is growing among the younger population. Private households account for an estimated 65% of sales, the remainder being sold to the commercial sector, mainly hotels and hospitals. On average homeowners change their mattress every 8-10 years, while hotels and hospitals change their mattresses more frequently.

Turkey now has the latest in mattress manufacturing equipment and the country produces a wide range of quality textiles from cotton to bamboo. Almost every input used in the production of mattresses can be produced in Turkey.

50% of all Turkish mattresses are produced in Kayseri, with up to 400 component manufacturers involved in producing 2.5 million per year. Kayseri offers a good logistical base from which to reach all parts of Turkey. Istanbul and Bursa are the other leading mattress producing cities. Exports typically accounted for 18-19% of production, until rising to 36% in 2018 and 51% in 2019. The majority of mattresses are exported to the United States, the EU and Iraq. The US-China trade war has created some opportunities for the Turkish mattress industry, as well as the growing global trend for on-line retailers who outsource mattress production.

Leading brands of mattresses include Bellona, Istikbal, Mondi, Alfemo, Doğtaş, IDAŞ, Işbir, Kilim, Yataş Yatak and Yatsan.

The mattress sector is growing rapidly, due to the low capital requirement of production start-up, but also because many parts of the population are still upgrading from traditional cotton filled mattresses and from sleeping on sofas. In addition, the population is becoming more urbanised and there has been a growth in the size of houses, allowing the separation of living and sleeping rooms.

According to the industry, there are several small pop-up enterprises that produce pull-out beds/ guest beds from old mattresses. These are causing concern because they can create a low-quality image for foam mattresses. There is a steady demand for these low-cost mattresses, because the ability to offer hospitality is a very important cultural tradition.

Turkey's tradition of hospitality has also extended to sheltering millions of immigrants and refugees, creating an increased demand for mattresses. Orders from UNHCR for the refugee camps used to be high, but in the past 2 years these orders have stopped, mainly due to reduced funding. Turkish foamers supplied many thousands of foam mattresses to the refugee camps. In 2018, UNHCR ordered a total of 4 million mattresses globally, of which 1 million were provided by IKEA. In 2019 orders fell to 2.5 million with IKEA supplying 660,000.

The successful export of mattresses to the United States has led to an anti-dumping case being made by several leading mattress manufacturers and retailers, against several Asian countries, Serbia and Turkey. As the data below illustrates, US imports of mattresses from Turkey increased dramatically during 2019. This case continues but may lead to anti- dumping tariffs imposed on mattresses from several Turkish manufacturers.

Table 2: Imports of Mattresses to the United States from Turkey 2017-2019

Mattresses	2017	2018	2019
N° of units	259	461	241,382
Value (USD)	45,112	89,234	21,370,019
Average Unit Value (USD)	174.18	193.57	88.53

Source: USITC Dataweb

3.3 Automotive Production

According to Turkish Automotive Manufacturers Association (OSD), Turkey is now the largest light commercial vehicle manufacturer in Europe and ranks 14th in the world in terms of automotive production output. The automotive industry is one of the main drivers of the manufacturing sector in Turkey, with a total production capacity of just over 2 million vehicles, of which 1.2million are passenger cars. It is also one of the main sources of employment in the country, providing more than 400,000 jobs

The automotive industry is mainly focused in Bursa province, north-western Turkey. Production was not completely halted during the lockdown in H1 2020, as there was still demand from the Far East and South America. The industry did however, struggle with a major drop in exports to Europe, to where approximately 75 % of vehicles manufactured in the country are exported.

After reaching a peak in production during 2017, concerns over the political and economic situation led to falling production levels as some foreign investors halted manufacture in Turkey.

According to OSD, vehicle production was reported to be down by 27% for H1 2020 compared to the previous year, while demand increased by 60%. Imports increased by 65%, in spite of the falling value of the Lira and high levels of tax. Domestic demand for new passenger cars has been relatively weak in recent years, due to taxes that make Turkey one of the most expensive countries in which to own a car. The purchase of a new car is subject to a one-off ‘Special Consumption Tax’ (ÖTV), based on the vehicle’s engine size and pre-tax price.

However, attractive loan opportunities announced by several banks during H1 2020 significantly boosted the demand for cars. Some government-backed banks were offering loans with interest rates as low as 0.49% and a non-payment grace period of up to 12 months. The loan packages also included second-hand car purchases, according to national new reports in Sabah Daily.

At the end of August, the government increased the special consumption tax (ÖTV) on mid-range and luxury cars, while also lifting the lower thresholds at which the duty is imposed, meaning that more vehicles could be taxed at the unchanged lower rates.

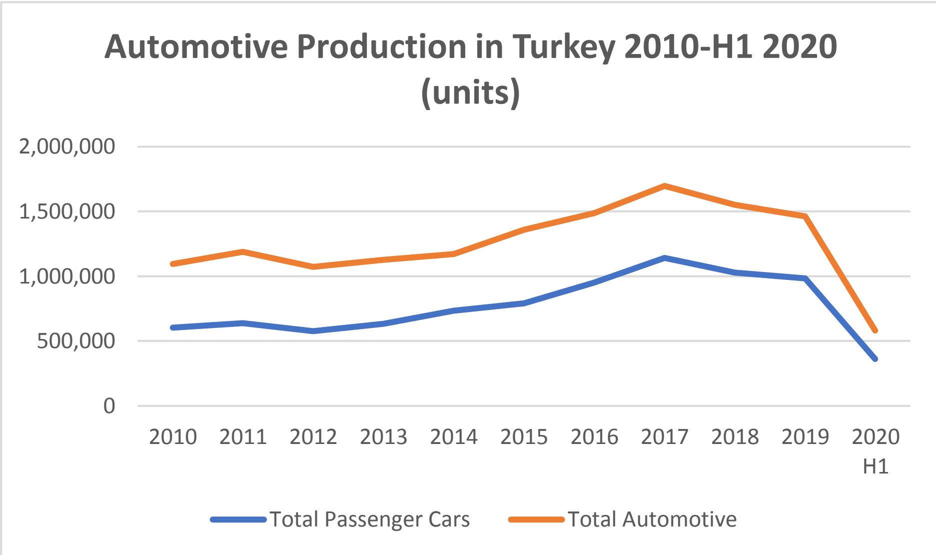
For most cars with engine capacity of up to 1.6l and price of ₺130,000, the (ÖTV) increased from 60% to 80%. For electric cars, this tax is much lower. Models with a power of more than 120Kw attract a tax of 15%. However, for luxury cars priced in excess of ₺170,000 and with an engine capacity of more than 2L, the tax increases to 220% from 160% of the purchase price. For example, the best-selling VW Passat with a basic price for the entry-level model with 1.5L engine costs €30,200 Germany, but €36,200 in Turkey at the end of August. With the new tax increase, there is an additional € 4,500 making the price €40,700. For luxury models like the BMW 7-series, with the German base price of €87,300 euros, buyers previously paid €198,000 for the entry-level model in Turkey. With the new tax increase, the vehicle now costs € 264,600 in Turkey. Value-added tax (VAT) on all car purchases remained unchanged at 18%. Vehicles in Turkey are also subject to an annual vehicle tax, Motorlu Taşıtlar Vergisi (MTV).

The tax increase is therefore bad news for producers of powerful vehicles, such as Volkswagen or BMW, but good news for local manufacturers like Fiat, Renault or the Turkish manufacturer Tofas. Although the hikes do not apply to locally produced cars, domestic producers may find it difficult to benefit as they also rely on imported goods for much of their supplies.

These tax rises were part of a package needed to ease the deterioration in foreign trade caused by the Covid-19 pandemic. The measures follow a series of tax increases that Turkey announced since the beginning of the pandemic to discourage imports while supporting domestic industries. In addition, consumers are being encouraged to buy smaller, more fuel-efficient cars.

As a result of the taxes, car sales are forecast to around 600,000 in 2020, down significantly from the 750,000 forecast at the start of the year by the industry association, OSD.

Chart 4: Automotive Production in Turkey (no. of vehicles)



Source: OSD

Table 3: Production, Export and Import of Passenger Vehicles, 2015-2020 (H1)

Passenger Car Industry	**2015**	**2016**	**2017**	**2018**	**2019**	**2020 (H1)**
(No.of vehicles)						
Production	791,027	950,888	1,142,906	1,026,461	982,642	362,397
Exports	604,839	745,781	921,480	875,531	828,972	281,634
Imports	539,070	565,045	505,968	397,268	277,070	124,254
Sales	725,598	756,938	722,759	548,198	387,256	203,595
Source: OSD						

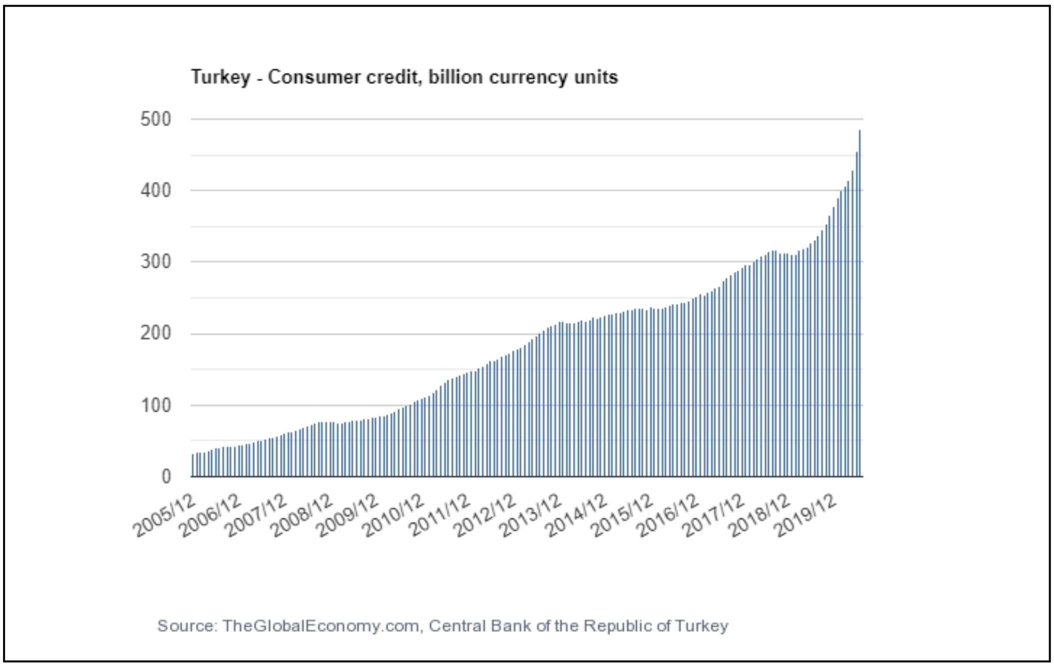
4. Market Drivers & Macroeconomic Indicators

The flexible foam industry is subject to many of the main macroeconomic trends that affect the entire country, including rising inflation, increased costs of consumer credit, high consumer taxes and a fall in the value of the Lira. However, the young and growing population needs new furniture and mattresses which drives domestic demand. In addition, the geographic position of Turkey provides excellent access to many export markets, where Turkish furniture and mattresses, as well as vehicles are appreciated.

There has been approximately 30% decrease in the value of the Lira since the beginning of 2020. In addition, there have been increases in raw material prices including, chemicals, steel, fabric and fuel. This had led to tough competition between manufacturers, with customers and retailers having considerable power to exert downward pressure on prices.

The main driver of the domestic economy is access to consumer credit, this has increased sharply in recent years, as more and more consumers are encouraged to borrow money. However, rising inflation and unemployment, weaker consumer confidence and the inability to service these debts, may limit future growth in the domestic market.

Chart 5: Increasing consumer credit 2010-2020 (Billion Lira)

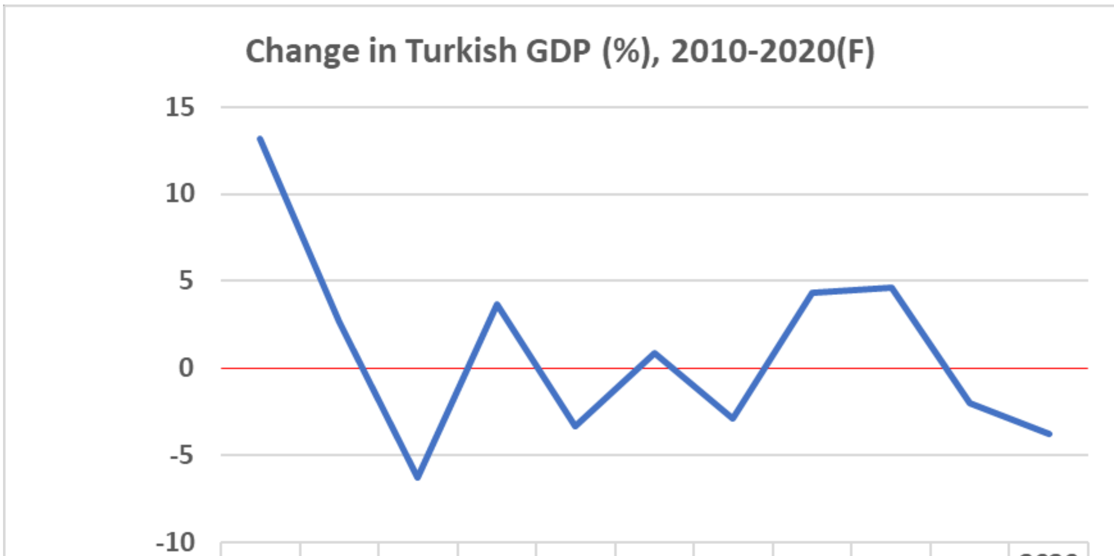


As a guide to the general state of the flexible foam industry, macroeconomic factors can be used to provide insight and a guide to future production. However, in the case of Turkey, the relationship between these factors and the level of foam production is not always clear and regular fluctuations in economic growth, taxes, interest rates and foreign exchange rates makes forward planning and forecasts extremely challenging.

4.1 GDP Growth

After a stellar annual growth in GDP of just over 13% in 2010, the Turkish economy has fluctuated between growth of around 3-4% and declines by -2—6.0% during the next decade. The IMF current forecast is for a contraction of 5% during 2020, while the World Bank forecasts a decline by 3.8%. In Western economies the level of GDP growth closely tracks consumer spending on durable goods, including furniture.

Chart 6: Turkey's GDP 2010-2020(F)



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020 F
GDP (%)	13.2	2.6	-6.3	3.7	-3.3	0.9	-2.9	4.3	4.6	-2	-3.8

Source: World Bank

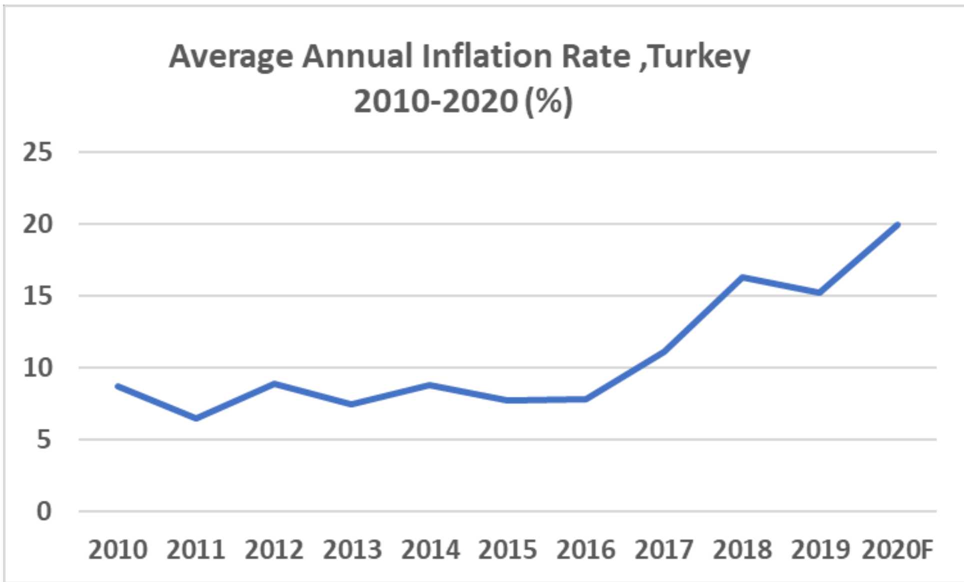
4.2 Inflation and Foreign Exchange

Turkish consumers have experienced constantly rising inflation over the past decade, as the country imports more fuel and goods while the value of the Turkish Lira declines. Average wages have not kept pace with inflation, leaving consumers with a lot less disposable income and making them more dependent upon high levels of personal debt. To encourage sales, purchases of almost every product and service can be paid for by monthly instalments. While this system of consumer credit maintains demand, it can cause havoc with cash flow for retailers with little or no working capital.

During 2020, interest rates on personal loans and mortgages were lowered to stimulate the economy, but as a result, money has been spent on imported goods and added further to the country's trade deficit.

While the value of the Lira declines, many of the population hold savings as foreign currency. It is not uncommon for people to have bank accounts in US Dollars and Euros, or simply to have a pile of foreign currency kept at home as a safety net against the regular devaluation of the Lira and resulting inflation.

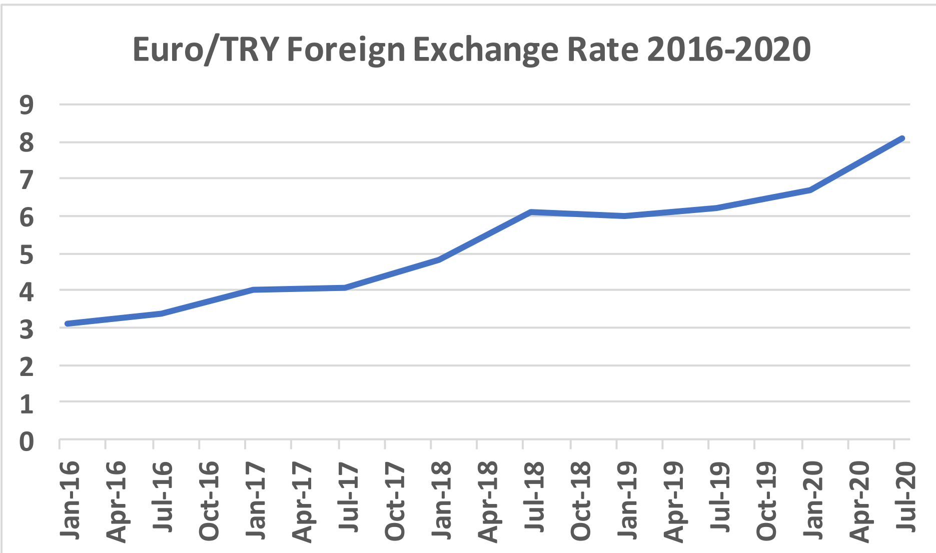
Chart 7: Average Annual Inflation Rate 2010-2020 (%)



Source: World Bank

While inflation has impacted the domestic market, the sharp decline in the lira has made Turkey more competitive in developing exports. During the first half of 2020 the currency lost about 20-25% of its value against the dollar, making imported raw materials for foam production increasingly expensive. Despite the increased costs of raw materials, foamers have been working at close to full capacity to meet export orders and pent-up demand in the domestic market.

Chart 8: Foreign Exchange Rates Euro /Turkish Lira (TRY)

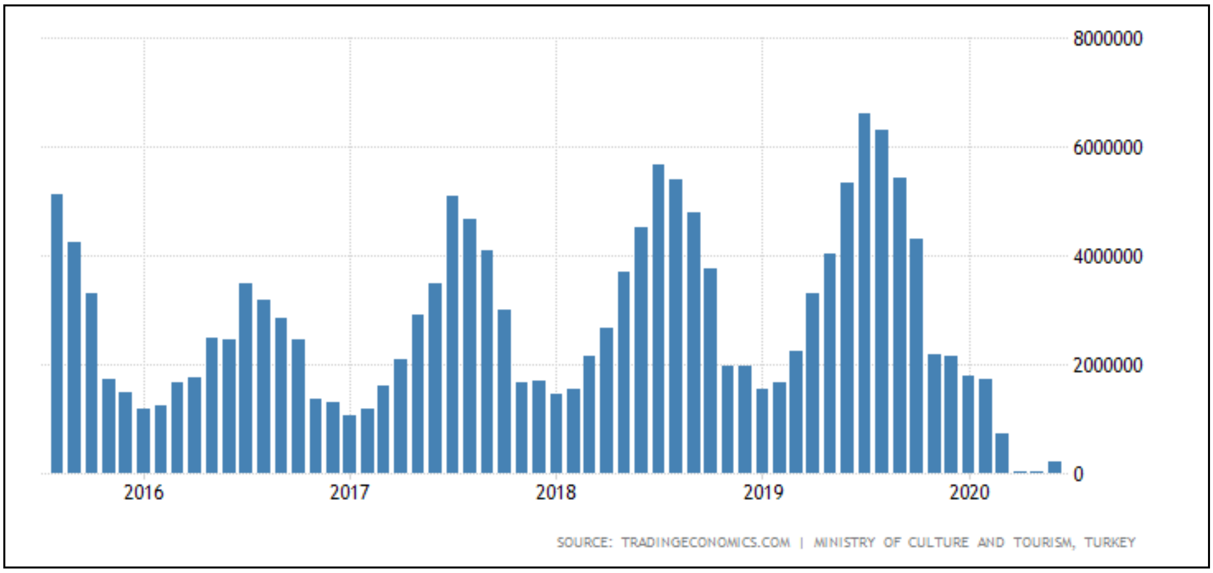


Source: www.ft.com

4.3 Tourism

The effect of a weak currency had attracted a growing number of visitors to Turkey in the last 4 years, with a record 52 million visitors reported in 2019. The tourism industry generates 12% of the country's wealth and is also an important sector for the furniture and bedding manufacturers. Since the start of the pandemic, the country has seen a huge decline in visitor numbers to only just over 5 million for the first half of the year. A weakened tourism industry will ultimately damage the country's economy this year. Up until June 2020 only 5 million visitors were recorded.

Chart 9: International Tourist Arrivals 2016-2020(H2)



4.4 Marriage

On average there are 500,000-540,000 wedding each year in Turkey. These weddings typically occur during the Spring and Summer seasons and generate a significant demand for new furniture and mattresses. Due to limitations on weddings during the lockdown in Q2, the lucrative "wedding season" for furniture sales was postponed until June, when demand rose to unexpectedly high levels.

5 Conclusion

Many Turkish businesses have shown great resilience and innovation over the past two decades, by resolving a constant stream of challenges such as an overnight currency devaluation of 50%, high inflation, continued weakness of the Lira, geopolitical tensions, withdrawal of foreign investment, rising unemployment and challenges associated with homing 4-5 million refugees and most recently the effects of Covid-19. The foam industry is no exception, as the production of foam and number of market participants have continued to increase.

A good supply of labour, locally available raw materials and equipment for upholstery and mattress manufacturing, innovative designs and good access to consumers in near Asia, the Middle East and Europe as well as the United States have helped the foam industry and its downstream markets to grow, despite shortages and sharp price changes for key chemical raw materials.

Turkey is now looking to become a cost-effective competitor to Poland and Italy. Many factors are starting to look attractive to Asian manufacturers who are facing rising costs at home. Turkey can be seen as a strategic manufacturing base, close to many existing and emerging markets and open for foreign investment.

Appendix 1 – Slabstock Manufacturers

The following table is a list of slabstock manufacturers operating continuous lines.

Slabstock Manufacturer	Location
Birlik Sünger	Organize Sanayi Bölgesi, 75. Yıl (Sultandere) Mahallesi, Şehitler Bulvarı No:7, Odunpazarı, Eskişehir www.birliksunger.com
Espol Sünger	8. Cd. No: 20, 26250 Organize Sanayi Bölgesi, Odunpazarı, Eskişehir www.espol.com.tr
Feba Sünger ve Mobilya	No: 45. Sokak. No:16, 38070 Kayseri Organize Sanayi Bölgesi, Melikgazi, Kayseri
Foampak	Organize Sanayi Bölgesi, 2. Cadde No: 9 43000 Kütahya www.foampak.com.tr
Fomax/Hakan Sünger	Çavuşköy Mah. Ergenekon Cad. No: 8 Malkara, Tekirdağ, Istanbul www.hakansunger.com
Form Sünger- Istikbal	8. Sk. No:60, 38070 Kayseri Organize Sanayi Bölgesi, Melikgazi, Kayseri www.formsunger.com.tr
Form Sünger- Istikbal	Subaşı, 38560 Incesu, Kayseri
Gelisim Sünger	Şabanoğlu, Vali M. Erdoğan Cebeci Blv. No:41, 55330, Organize Sanayi Bölgesi Tekkeköy, Samsun www.gelisimsunger.com.tr
Inter Sünger	Alemdağ, Şair Mehmet Akif Ersoy Cd., 34794 Çekmeköy, Istanbul www.intersunger.com.tr
Işbir Sünger Sanayi	Saray Gümüşoluk, Mahallesi, Gümüşoluk Küme evleri No:263, 06146 Pursaklar, Ankara www.isbirsunger.com
Işbir Sünger Sanayi	Yedi Eylül, 5568. Sk. No:2008, 35860 Torbalı, Izmir
İstanbul Malzemecilik	Zerzavatçı, 34829 Beykoz, Istanbul
Kayseri Sünger	38100 Kayseri Organize Sanayi Bölgesi, Hacılar, Kayseri www.kayseri.com
Marfom Sünger Kimya	2. Organize Sanayi Bölgesi 2 Nolu Yol No:16, Kargalıhanbaba, Hendek, 54300 Sakarya www.marfoamsunger.com
Mitsan	Organize Sanayi Bölgesi, 21. Caddesi. No:8, 38070, Kayseri www.mitsan.com.tr
Nova Sünger	Kozluk Mh. D-100 Yanyol No:10, 54200 Erenler, Sakarya www.novasunger.com.tr
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Sunpor Sünger	Çaybaşı Yeniköy Mah. M.Fevzi Çakmak Cad.No:73 Erenler / Sakarya, 54200 Erenler, Sakarya
Urosan Kimya Sanayi	Velimeşe Organize Sanayi Bölgesi, Mahallesi. 128. sokak. 9/1, 59930 Ergene, Tekirdağ, Istanbul www.urosan.com.tr
Yataş Sünger	Melikgazi Mah. Organize Sanayi Bölgesi 18. Cadde, D:6, 38070 Melikgazi, Kayseri www.yatasfoam.com.tr