



REPUBLIC OF TURKEY  
MINISTRY OF ECONOMY

INDUSTRY



# PACKAGING INDUSTRY



TURKEY

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## PACKAGING INDUSTRY

Packaging provides protection to products by ensuring safe delivery from the place of manufacture to the point of sale or use.

The Turkish packaging industry is a well-developed sector. In recent years, innovations and the environment friendly production in the sector have increased. In addition, new packaging formats are improved according to the quality, size and appeal of products.

Growth in population and living standards, rapid urbanization, diversification of consumer goods, increase in the number of women in labor force and increase in exports – mainly in consumer products, have all resulted in higher demand for packaging products. The Turkish packaging industry has grown rapidly over the past 10 years and has now become a huge sector. The growth of the sector reflects changing shopping habits, particularly in large cities, due to the presence of supermarkets, department stores and hypermarkets. Increased advertisement of consumer products, attractive point-of-purchase packaging and the boom in sales of canned and frozen food, apparel, and disposable medical supplies, all of which require specialty packaging, and especially the increase in exports are other factors for the expansion of the packaging sector.

Packaging consumption in Turkey has increased rapidly following the world trends. As the retail market has expanded rapidly, the sales of packaged products to the final consumer has increased. This development has resulted in intensive studies on packaging forms and more rational packaging. In the last five years, the average growth rate of the Turkish packaging industry has been 6% per year, and it is estimated to remain the same in the coming years.

The annual consumption of packaging is about 5.5 million tons. The breakdown of packaging products consumption in Turkey is 39% for paper, carton and corrugated board packaging, 33% for plastic packaging, 13% for glass packaging, 8% for wood packaging and 7% for metal packaging.

Turkey produces all types of packaging materials and products such as paper, cardboard, wrapping film, tape, plastics, glass, metal and wood. The need to arrange the product for packaging according to its physical and chemical properties has led to different ways of utilizing the main materials by processing them with new technologies. In other words, the flexibility of the materials has increased with regard to protection capabilities and shelf life.

There are about 3000 companies manufacturing various packaging materials in Turkey. Most of the companies are medium and small sized companies, but there are also a few large companies. Fifty three packaging manufacturers are among the largest 1000 companies in Turkey. The companies in the sector show very good performance in terms of quality and production capacity. Companies in the packaging industry are mostly located in Istanbul, Izmir, Bursa, Ankara, Konya, Kocaeli, Gaziantep, Adana, Kayseri and Manisa. The packaging sector is well-organized under the Exporters' Unions and sectoral associations.

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The plastic packaging sector in Turkey has a total production of 1.8 million tons/year. Most of the companies in the sector are small and medium sized. The Turkish PP woven bags and sacks sector has an important production and export capacity, and ten large sized companies producing big bags are organized under the Turkish Flexible Intermediate Bulk Containers Association.

Paper, carton and corrugated board products have become one of the leading sectors of the packaging industry and account for approximately 39% of the packaging industry's production. The paper, carton and corrugated board products sector in Turkey has a total production of 2.1 million tons/year.

Metal packages made of aluminum, tin, and iron sheets are supplied to the market in different forms. The steel packaging (vegetable oil, pickle, mineral oil, paint and other chemicals drums and boxes, boxes for food, beverages, aerosol and beverage lids, glass jar lids) and aluminum packaging (covers all kinds of food and non-food aluminum boxes) production capacity has reached 600.000 tons. The annual production reached about 388.000 tons and accounts for approximately 7% of the packaging industry's production.

Turkey has a well-developed glass industry. There is a group of companies, namely "Türkiye Şişe ve Cam Fab. A.Ş." in the glass industry which dominates the domestic market. It accounts for approximately 95% of Turkey's total annual production of glass and ranks 12th amongst the top 25 firms in the world. The Group consists of 26 companies which produce almost every kind of glass product, and Anadolu Cam which produces glass packaging. Turkey has a glass production capacity of 2.2 million tons in total. Approximately one third of this capacity, which is about 750.000 tons, is for glass packaging products. Anadolu Cam Türkiye Şişe ve Cam Fab. A.Ş. exports glass containers as well as packaging production technologies.

Wooden packaging consists mainly of products used for packaging agricultural products such as fresh fruits and vegetables, standard and non-standard pallets used in warehouse stacking and logistics, demountable transportation boxes and containers. Total capacity is estimated to be 600.000 tons/year and the production of various wooden packaging materials is about 440.000 tons/year. Sector products comply with recent ISPM15 Standards.

The Turkish packaging sector has also reached world standards in terms of quality. The number of firms which have ISO 9000 Quality System Certificates, ISO 14001 Certificates and ISO 22000 Certificates is rapidly increasing. In addition, Turkish packaging manufacturers closely follow recent international and national developments in environmental issues and comply with environmental legislation and regulations.

All types of packaging wastes, including those imported and/or produced in Turkey, are controlled under the "Packaging and Packaging Waste Management Legislation". Additionally, there are legislative preparations for the control of food packaging production and articles in direct contact with food materials. With these additional legislative improvements, it is foreseen to reach a compliance with European Union regulations. The R&D and new product development activities in the sector have gained more importance in order to achieve competitiveness worldwide.

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## EXPORTS

Exports of the Turkish packaging industry show increasing trend. While it was 50 million USD in 1990, the value of packaging products exports reached almost 3.1 billion dollars in 2011. Additionally, a large quantity of packaging products is exported indirectly along with the exported product itself. This remarkable high increase in export value has undoubtedly been achieved due to recent modernization and technological improvements in the sector.

In 2011 the largest packaging group exported was plastic packaging products with a share of 69% in total exports in the packaging industry. The total export value of these packaging products reached 2,142 million USD in 2011. The main plastic packaging products exported are flexible intermediate bulk containers (sacks and bags, a kind used for the packaging of goods). Turkey is the world's second largest exporter of FIBC (Flexible Intermediate Bulk Containers) with an 18.3% share in 2009. The other plastic packaging products exported are sheets and films made of propylene polymers, vinyl chloride polymers and ethylene polymers, bags and sacks made of ethylene polymers, lids, stoppers, caps and other closures, carboys, bottles, flasks, preforms and similar articles.

The next largest packaging group was paper packaging products with a share of 18% in total exports of the packaging industry. The main export products are paper and board cartons, mainly corrugated board products, boxes, cases, bags and other packing containers. In 2011, the total export value of these packaging products reached 567 million USD.

The other important packaging group was metal packaging with a share of 9% in the total exports of the packaging industry. The main export products are aluminum casks, drums, cans, boxes and similar containers (including rigid or collapsible tubular containers). In 2011, the total value of these metal packaging products reached 281 million USD.

Glass and wood packaging products are other important export products. These products are carboys, bottles, flasks, jars, pots, phials, ampoules and other containers of glass and pallets, boxes of wood.

Turkish packaging products are exported to a wide range of countries and Turkey is now exporting various packaging products to 200 countries throughout the world. Packaging products are mainly exported to the European Union countries, Eastern Europe, the Middle East and the CIS countries. The major markets for packaging products are Germany, the United Kingdom, Iraq, France, Iran, the Netherlands, Italy, Israel, Russian Federation and Romania. In 2011, Germany and the United Kingdom had a 9% and 7% share in Turkey's packaging industry exports, respectively.

### Packaging Exports by Products (Value: US \$ Million)

Packaging	2007	2008	2009	2010	2011
Plastic packaging (*)	1.338	1.608	1.349	1.704	2.142
Wood packaging	30	33	28	30	37
Paper, cardboard and corrugated board packaging	352	427	385	471	567
Glass packaging	22	48	36	32	31
Metal packaging	192	227	202	221	281
Other packaging	25	26	21	25	30
<b>Total</b>	<b>1.960</b>	<b>2.368</b>	<b>2.020</b>	<b>2.483</b>	<b>3.088</b>

Source: Turkish Statistical Institute

(\*) including sacks and bags, of polyethylene or polypropylene strip or the like and flexible intermediate bulk containers for the packaging of goods

### Turkey's Exports of Packaging Materials, (Value: US \$ 1000)

H. S. No.	Packaging Materials	2009	2010	2011	Major Export Markets in 2010
3919	Self-adhesive plates, sheets, film etc of plastic w/n in rolls	67.352	78.246	97.922	Iran, Russian Fed., Germany, Azerbaijan, Romania
3920	Other plates, sheets, film, foil, tape, strip of plastics etc.	433.127	568.956	733.608	UK, France, Germany, Italy, Ukraine
3921	Plates, sheets, film, foil and strip, of plastics	161.883	211.107	268.460	Iran, Azerbaijan, Germany, UK, Iraq
3923	Plastic packing goods or closures stoppers, lids, caps, closures	434.779	524.821	651.106	Iraq, Germany, UK, France, Romania
4415	Packaging materials of wood	28.247	29.722	36.385	Jordan, Germany, Iran, Iraq, Kuwait
4416	Casks, barrels, vats, tubs etc. of wood	62	217	157	Russian Fed., Turkmenistan, Israel, Azerbaijan, Iran
4804	Uncoated kraft paper & paperboard, in rolls/sheets	5.282	15.087	19.469	Saudi Arabia, Syria, Russian Fed., Slovakia, Brasil
4805	Uncoated paper and paperboard nes, in rolls or sheets	28.010	43.531	59.576	Italy, Greece, UK, Bulgaria, Iran,
4806	Vegetable parch, greaseproof, tracing, glassine paper etc in rolls/sheets	942	970	1.317	Morocco, Greece, Poland, TRNC, Bulgaria
4807	Composite paper & paperboard, not surface coated or impregnated	1.579	1.784	4.128	Russian Fed., India, Ukraine, Iran, Bulgaria,
4808	Paper and paperboard, corrugated, creped, crinkled, embossed, perforated	1.899	4.609	4.033	Georgia, Iran, Azerbaijan, Turkmenistan, Iraq
4811	Paper, paperboard, cellulose wadding & webs of cellulose fibers, coated	57.083	63.001	86.066	Iran, Libya, Germany, Azerbaijan, Egypt

4817	Cards, envelopes, letter/corre, plain postcards, stat of paper; box, wallet	14.894	19.583	10.951	France, Germany, UK, Greece, USA
4819	Packing containers, of paper, paperboard, cellulose wadding, webs	209.897	250.278	293.954	UK, Iraq, Germany, France, Israel
4821	Paper or paperboard labels of all kinds	30.113	37.821	47.136	Switzerland, Egypt, Netherlands, Italy, Bulgaria
4823	Other paper, paperboard, cellulose wadding cut to size & adhesive paper	35.773	35.591	40.475	Netherlands, France, Ukraine, Greece, Germany
6305	Sacks and bags of a kind used for the packing of goods	251.514	319.817	391.386	Germany, France Netherlands, USA, Saudi Arabia
7010	Carboys, bottles & other container of glass	35.505	31.680	31.039	Israel, Italy, Germany, TRNC, Georgia
7309	Iron & steel reservoirs, tanks, vats (cap >300l)	54.291	60.805	89.640	Iraq, Iran, Morocco, Russian Fed., Algeria
7310	Iron & steel tanks, drums, cans, boxes (cap <=300l)	90.503	97.677	128.956	Syria, UK, Israel, Germany, Jordan
7612	Aluminum containers (cap <= 300l)	48.090	53.469	52.113	Egypt, Greece, Syria, Germany, France
7613	Aluminum containers for compressed or liquefied gas	8.661	8.630	10.601	Germany, France, Poland, UK, Netherlands
8309	Stoppers, caps & lid, of base metal	20.964	25.182	29.862	Russian Fed., Bulgaria, Romania, Latvia, Syria
	<b>Total</b>	<b>2.020.143</b>	<b>2.482.584</b>	<b>3.088.339</b>	<b>Germany, UK, Iraq, France, Iran</b>

Source: Turkish Statistical Institute

**Packaging Exports by Countries (Value: US \$ 1000)**

<b>Countries</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Germany	177.907	216.251	273.659
United Kingdom	139.706	167.589	208.705
Iraq	90.786	141.979	201.761
France	112.627	142.811	193.228
Iran	86.094	106.961	150.220
Netherlands	68.193	83.585	112.594
Italy	66.897	86.283	110.220
Israel	77.529	85.902	98.287
Russian Federation	58.639	76.471	93.102
Romania	73.760	71.146	88.737
Greece	63.867	73.824	80.556
Azerbaijan	56.128	60.856	77.986
Bulgaria	62.653	67.615	74.890
Spain	47.657	60.174	69.241
USA	45.534	61.746	67.073
Georgia	38.717	49.302	65.344
Ukraine	39.904	45.602	60.873
Poland	29.667	42.574	53.348
Belgium	37.438	43.631	51.898
Egypt	39.908	46.571	51.650
Syria	47.115	58.880	51.439
Saudi Arabia	26.411	34.995	50.216
Jordan	45.098	40.452	47.795
Algeria	25.878	38.140	41.019
Turkish Republic of Northern Cyprus	24.651	31.255	31.540
Austria	17.442	21.149	30.660
Ireland	20.935	22.942	29.226
Sweden	18.784	23.001	28.174
Turkmenistan	16.677	24.494	26.752
Denmark	17.622	21.325	26.310
Switzerland	7.903	12.330	22.571
Morocco	7.304	10.958	21.409
UAE	18.307	16.259	20.625
Kazakhstan	14.231	16.860	19.946
Lebanon	15.193	16.506	19.743
Serbia	16.224	14.946	19.030
Libya	28.821	31.322	17.273
Czech Republic	9.640	12.657	16.907
Uzbekistan	9.288	12.728	15.243
Tunisia	8.579	9.323	14.401
<b>Total</b>	<b>2.020.477</b>	<b>2.482.584</b>	<b>3.088.339</b>

Source: Turkish Statistical Institute

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## TRADE FAIRS

In 2012, the only fair that will be organized in this sector is [Packaging Eurasia 2012-International Packaging, Packaging Processes, Packaging Machinery and Materials Exhibition](#) in Istanbul in September 20-23, 2012.

*Strong NGO's in the sector have been implementing a marketing project "Turkish Packology" which at present covers the Russian Federation. You can reach information about the Turkish Packology Project on its website (<http://www.turkishpackology.com>).*

## USEFUL LINKS

Packaging Manufacturers Association  
[www.ambalaj.org.tr](http://www.ambalaj.org.tr)

Corrugated Board Manufacturers Association  
[www.omud.org.tr](http://www.omud.org.tr)

Label Manufacturers Association  
[www.esd.org.tr](http://www.esd.org.tr)

Carton Board Packaging Manufacturers Association  
[www.kasad.org.tr](http://www.kasad.org.tr)

Flexible Packaging Manufacturers Association  
[www.fasd.org.tr](http://www.fasd.org.tr)

Packaging Machine Manufacturers Association  
[www.amd.org.tr](http://www.amd.org.tr)

Association For Recyclable Packaging Materials  
Collectors And Separators  
[www.tudam.org.tr](http://www.tudam.org.tr)

Rigid Plastic Packaging Manufacturers Association  
[www.sepa.org.tr](http://www.sepa.org.tr)





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