

Drivers for Packaging Development and Trends in the Turkish Republic and the Eurasian Region



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- Turkish Packaging Industry
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- Packaging
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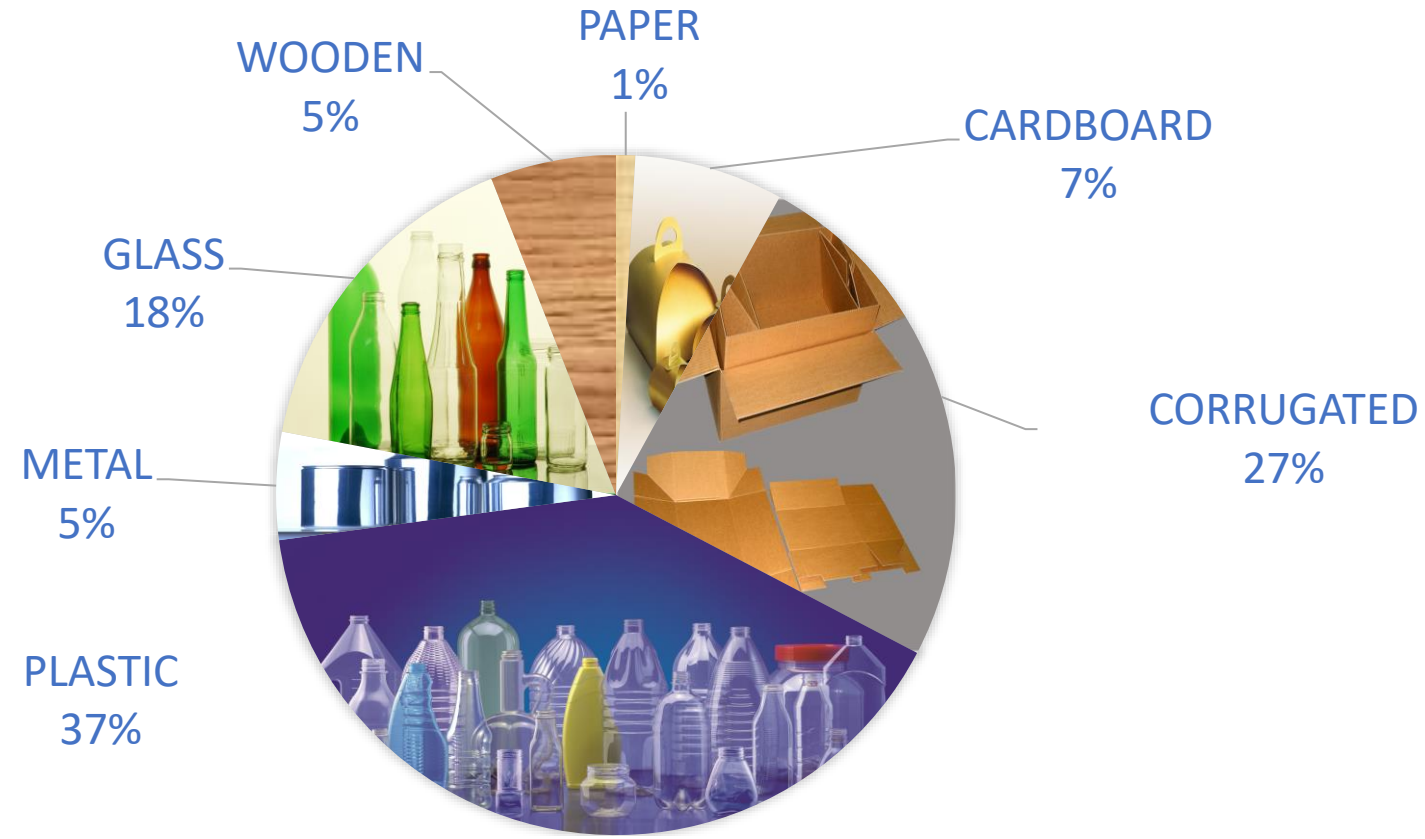
Turkish Packaging Industry

Turkish Packaging Industry Production (tons)

PACKAGING TYPE	2017	2018	2019	2020	2021
PAPER	82,750	103,000	99,500	85,400	95,000
CARDBOARD	643,000	660,000	714,000	722,000	755,000
CORRUGATED	2,241,000	2,300,000	2,282,000	2,880,000	3,050,000
PLASTIC	3,648,000	3,500,000	3,600,000	3,720,000	4,130,000
METAL	464,000	430,000	452,000	547,000	578,000
GLASS	1,455,700	1,560,000	1,640,000	1,800,000	2,000,000
WOODEN	542,000	540,000	550,000	550,000	600,000
TOTAL (tons)	9,076,450	9,093,000	9,337,500	10,304,400	11,208,000

Approx.: 28 billion USD total revenue, 2021
2023 target is 30 billion USD
2030 target is 50 billion USD

Turkish Packaging Material Production Share in 2021 (%tons)

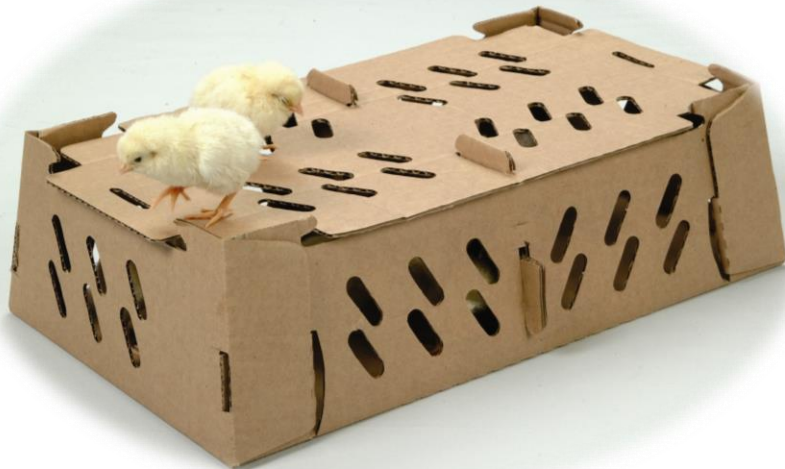


World Packaging Sector (USD)

- **Global Packaging Industry:**
975 billion USD (estimated) in 2018
- The biggest consumer is China
- Europe + Asia + the Middle East
675 billion USD
 - Emerging markets: India, Indonesia and Türkiye
- **Turkish Packaging Industry**
 - **6th in Europe**
 - **16th in World**
 - **6th in Asia**

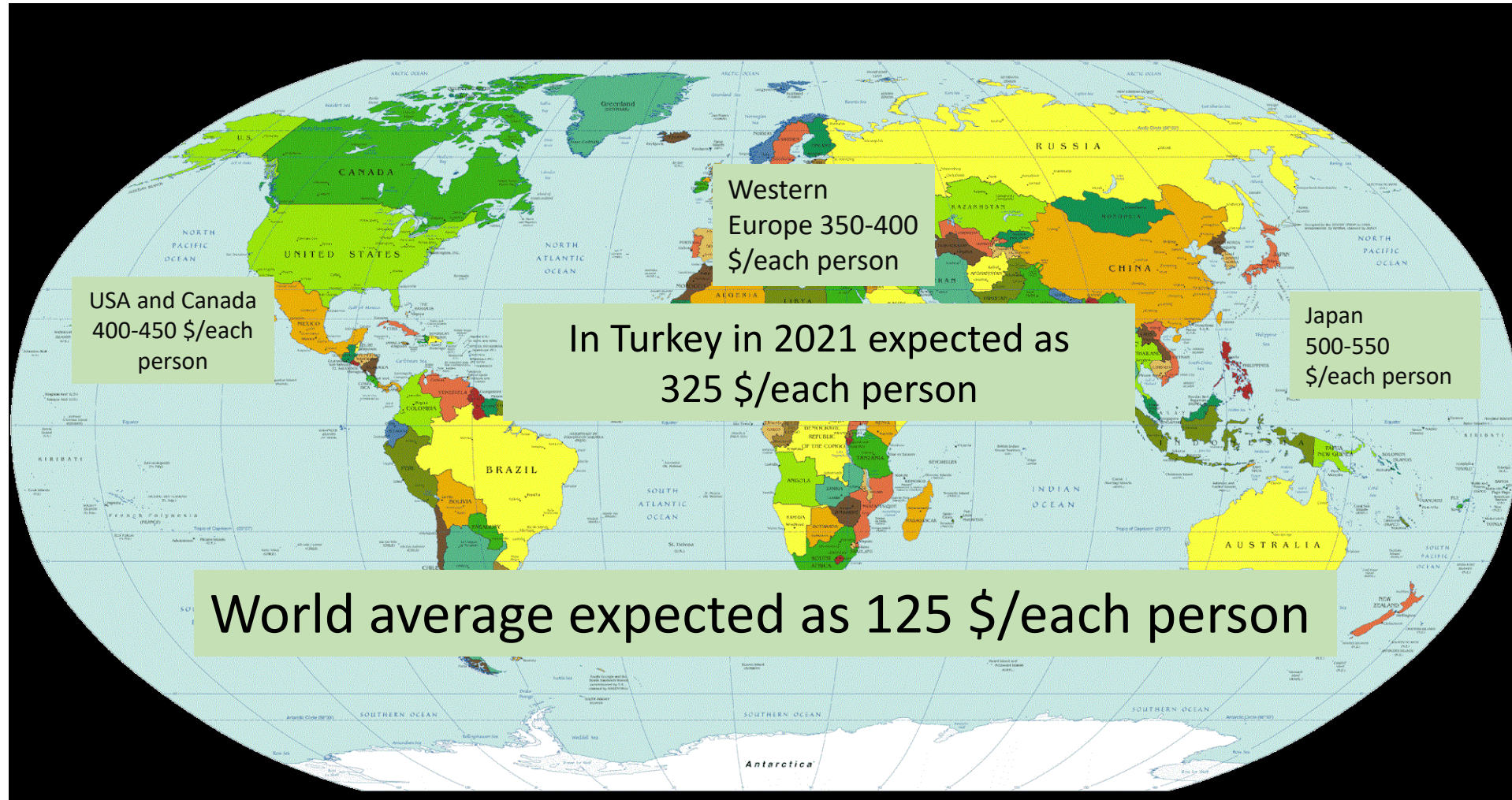


**USD 28 Billion
Packaging Production enables**



**Economy of min. USD 490
billion in the country**

Per Capita Consumption (USD / person)



Packaging Sector

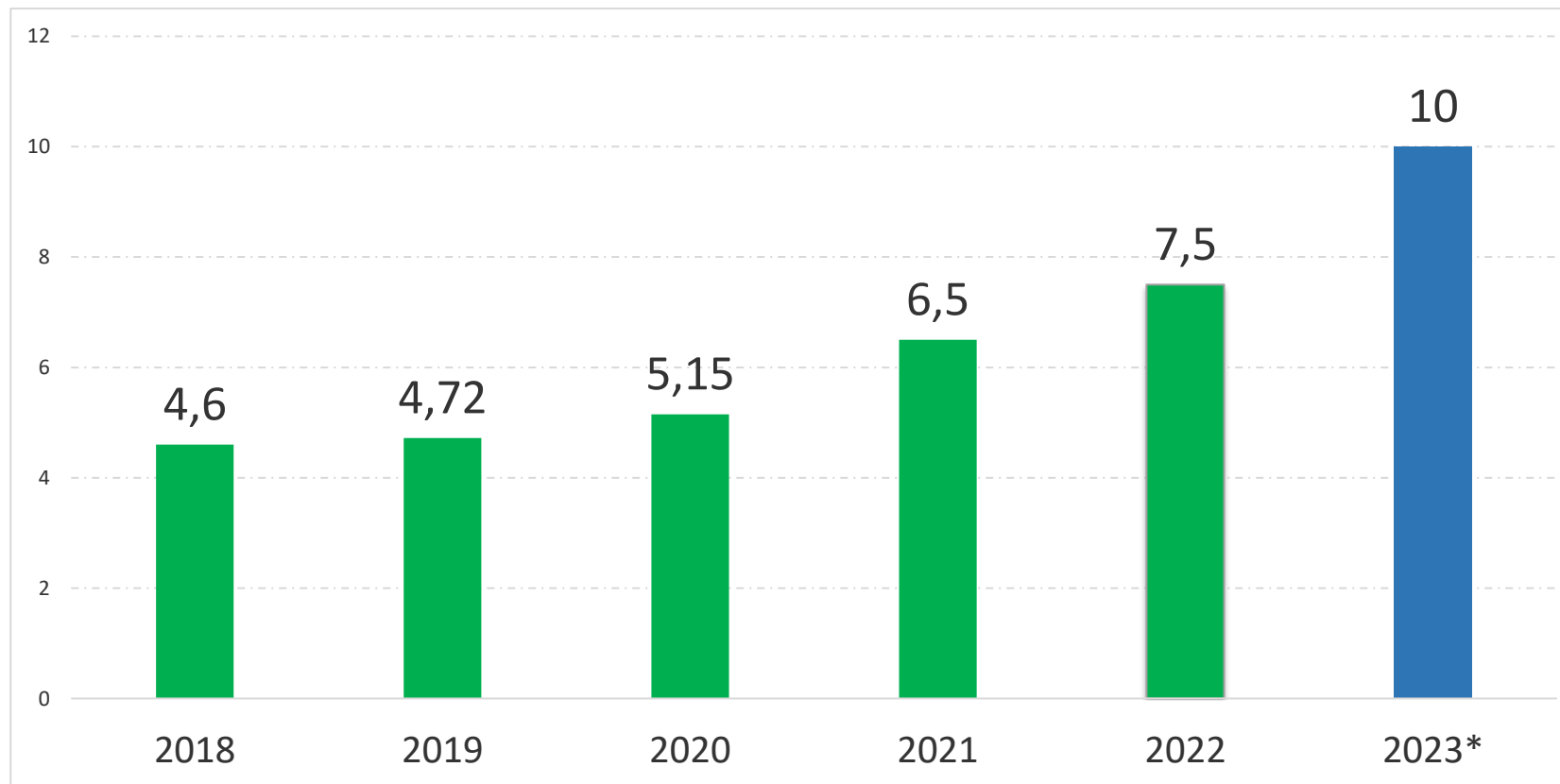
Packaging consumption
increased **two-fold** in the last
20 years.



Per capita consumption;
325 \$

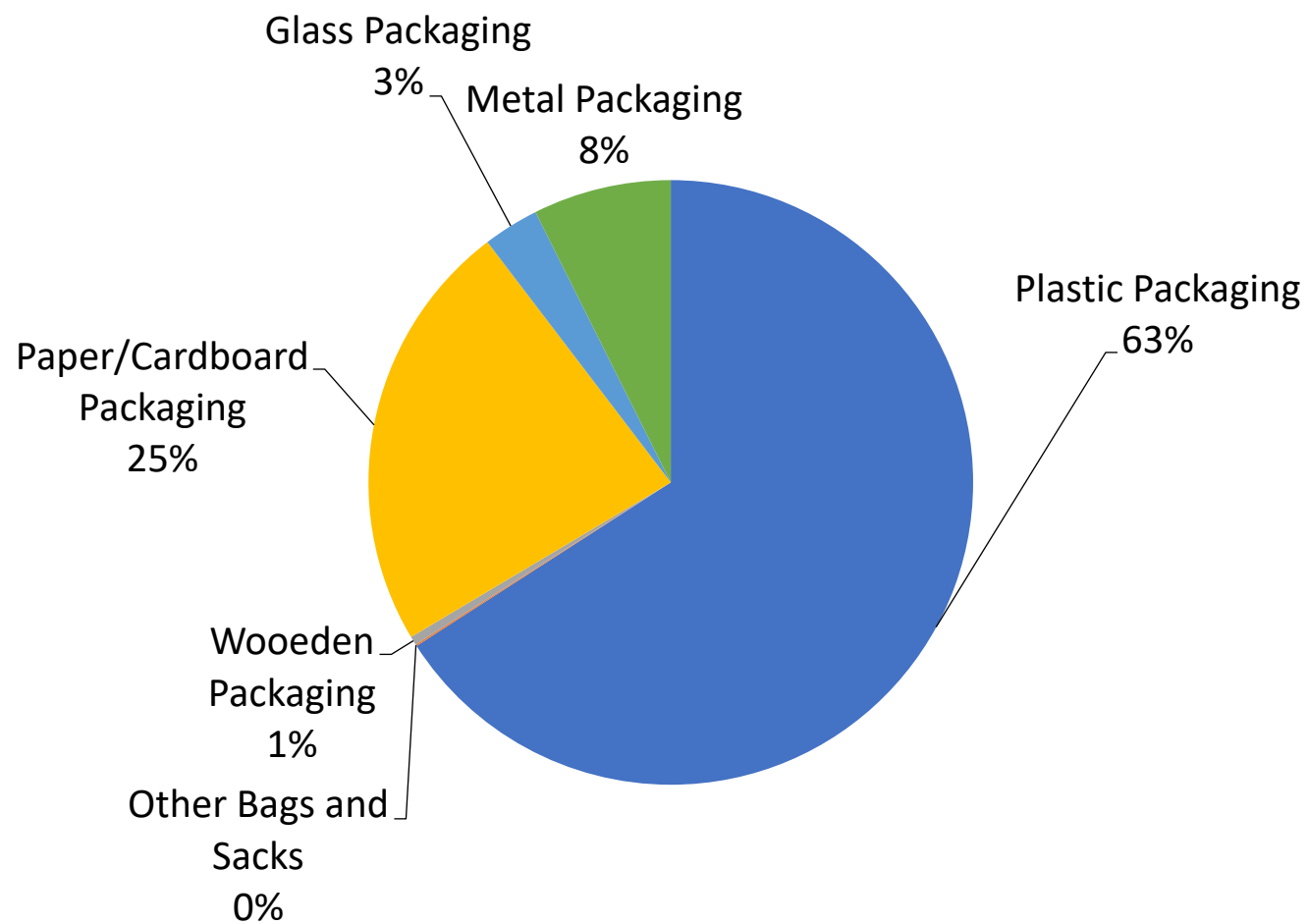


Packaging Sector Exports (billion USD)

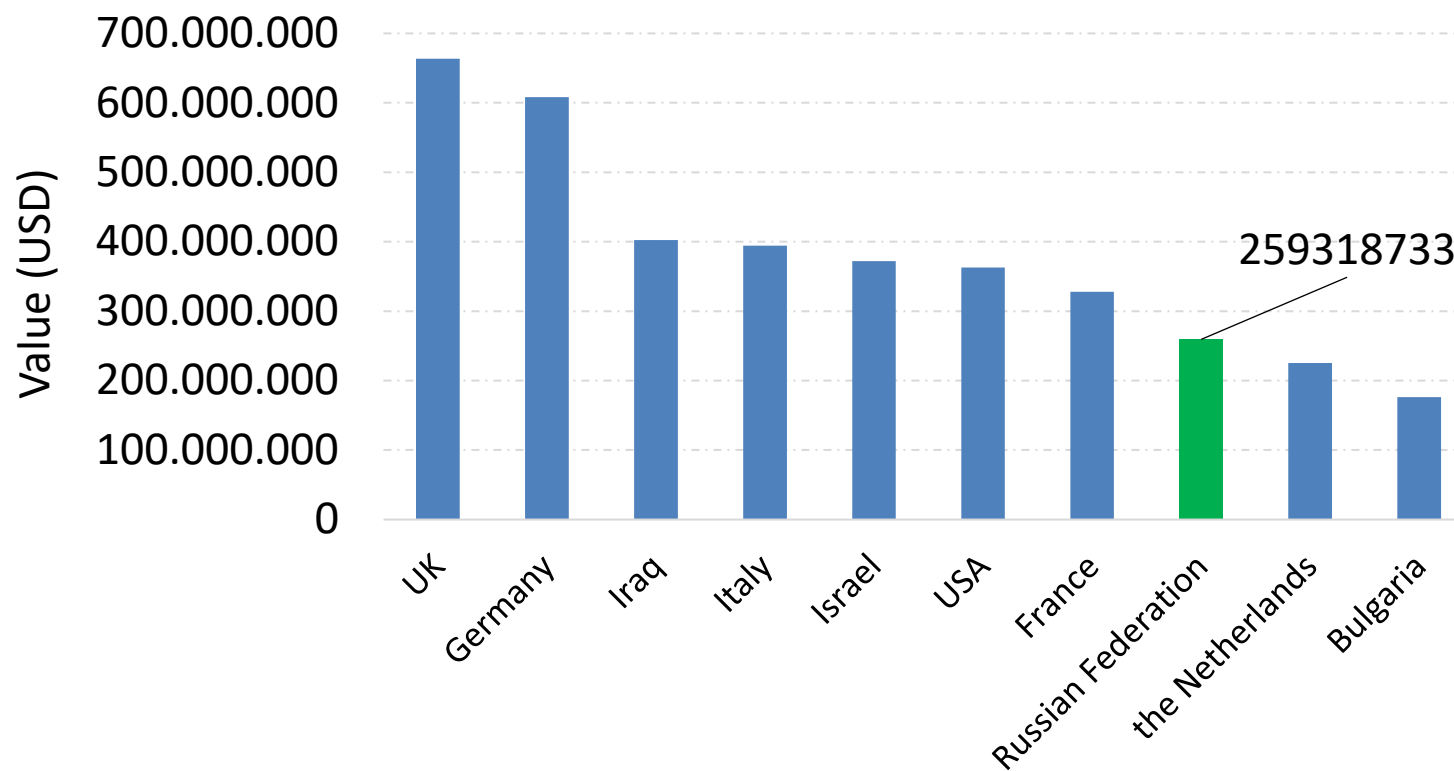


Our 2023 target is 8-10 billion \$ exports

Exports Share by Packaging Type in 2022 (USD)

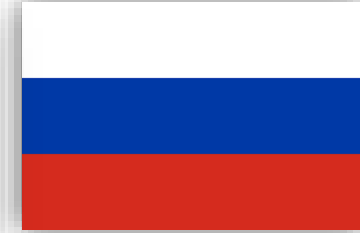


Top 10 Countries in Exports in 2022



Export

- Plastic packaging
- Bigbags
- Labels
- Glass packaging
- Wooden packaging
- Steel Packaging
- Aluminum packaging
- Corrugated Cardboard



Packaging Sector Imports (million, USD)

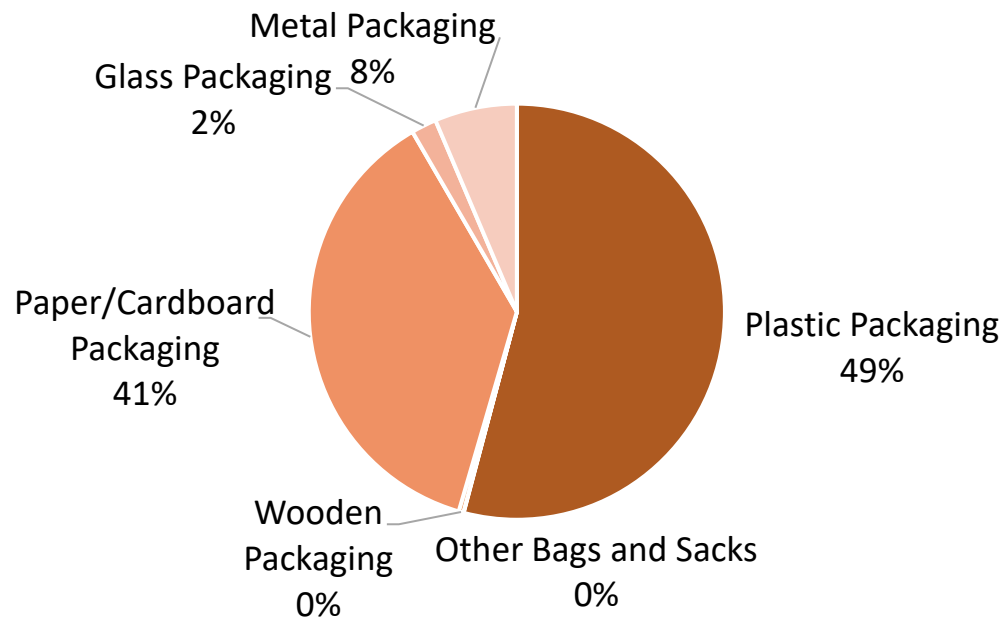


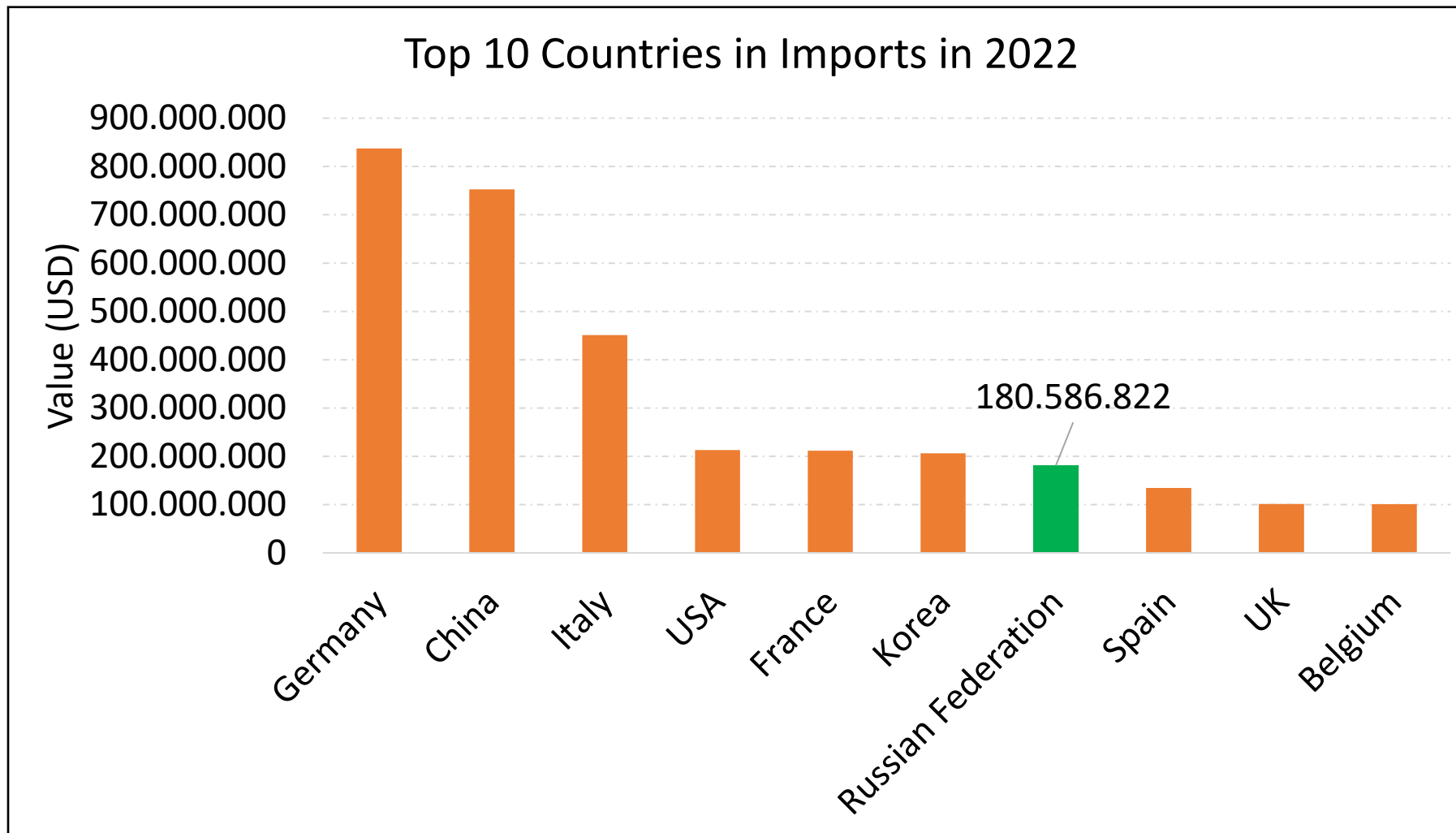
The majority of Packaging Imports are semi-finished products and raw materials.

In 2022 4,8 billion \$ imports

Foreign trade surplus was + 2,7 billion \$

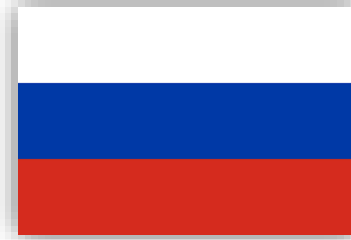
Imports Share by Packaging Type in 2022 (USD)





Import

- Plastic packaging
- Labels
- Glass packaging
- Steel Packaging
- Aluminum packaging
- Kraft paper
- Cardboard














ASD Turkish Packaging Manufacturers Association



ASD members

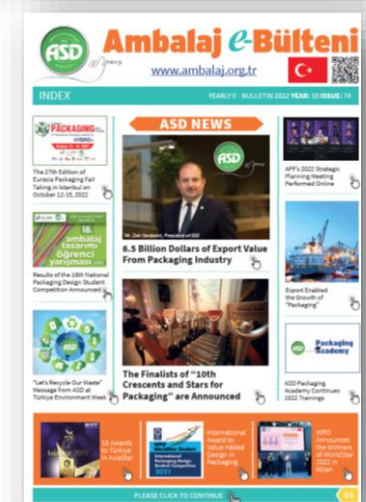
> 230 companies :

-  Flexible packaging
-  Rigid plastic packaging
-  Glass packaging
-  Metal (Steel & Aluminum) packaging
-  Paper, Cardboard & Corrugated Board
-  Wooden packaging
-  Label
-  Raw materials & auxiliary materials
-  Packaging machinery



Activities

- Exhibitions - Eurasia Packaging Show in Istanbul
- ASD Packaging Congress in Istanbul,
- Packaging Competitions - Crescents and Stars for Packaging
- Publications - Magazines, Guides & Books
- Training & Seminars - Packaging Academy
- Legislation Working Groups
- International Memberships.





Packaging

The Packaging

Sustainably

(3 + 1) S

Surrounds

Saves

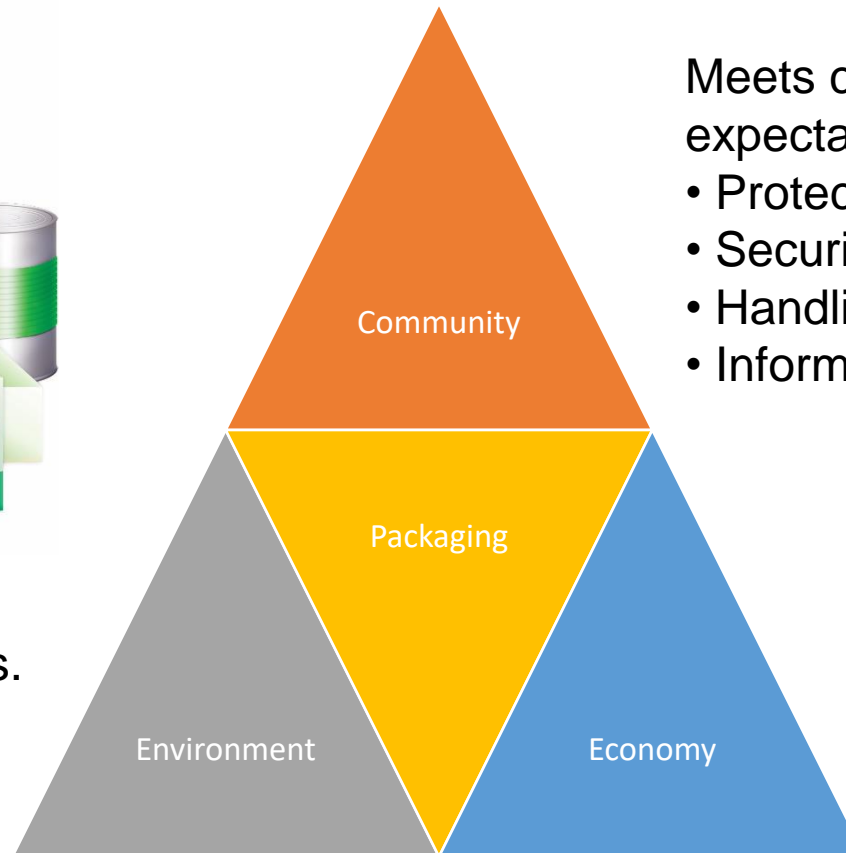
Sells

The Product





Saves resources
more than it uses.



Meets consumers
expectations:

- Protection
- Security
- Handling
- Information



Puts products on the
market.

Recovery brings
money.



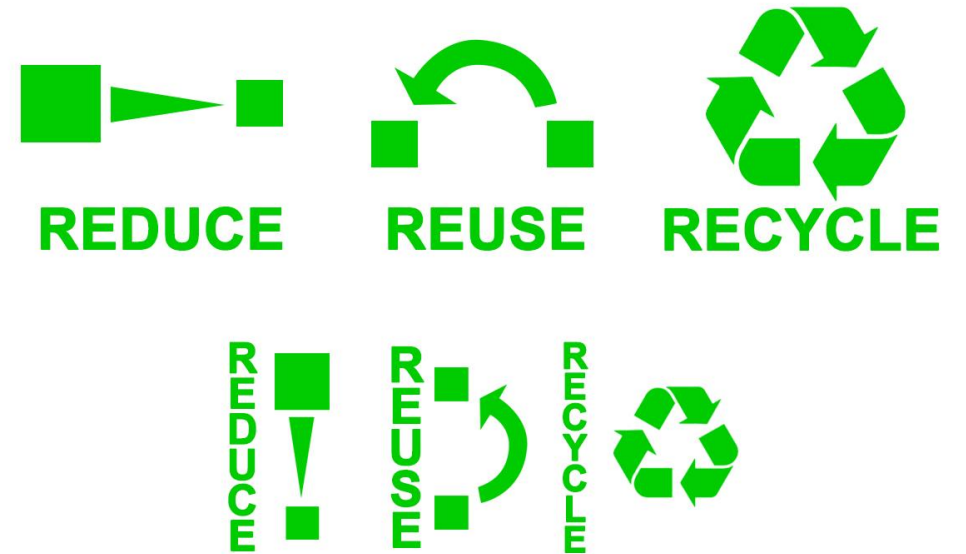
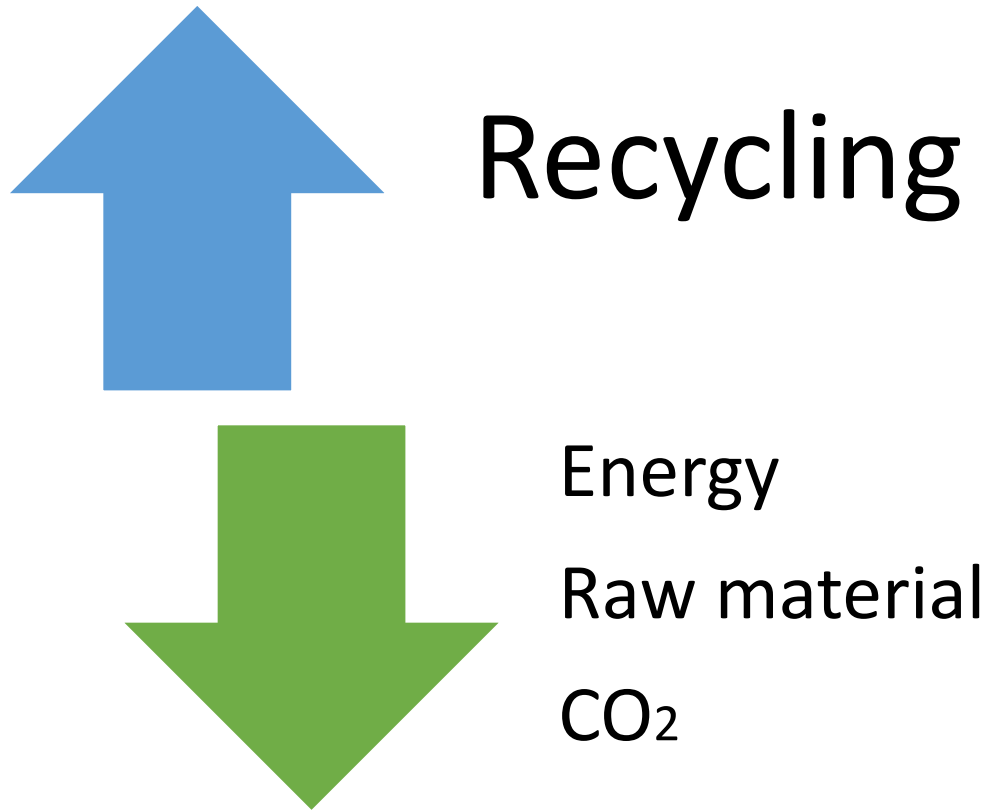
Packaging as Solution

- Perform Life Cycle Analysis
- Don't forget Hygiene
- Trade-offs between food waste & packaging



- "As little as possible, as much as necessary"

- Recycling should be considered the last line of defence.



When you recycle packaging, you will have less CO₂ Emissions



Material Recycling (1,000 kg or 1 ton)	Saving Greenhouse Gas / CO ₂ Emissions (kg)	References
Steel	1,512	UNEP
PET	1,500	Meltem Kimya
Glass	670	Şişecam
Cartonboard	326	ProCarton
Aluminum	95	UNEP



New Plastic Economy & Packaging Industry

- **Raw material efficiency & circular economy,**
- Using less material & renewing design,
- **Packaging from mono materials**
- Biodegradables or Plastics from petrochemicals
- **Environmentally friendly materials meaning increased recycled content**





Surrounds , Saves , Sells

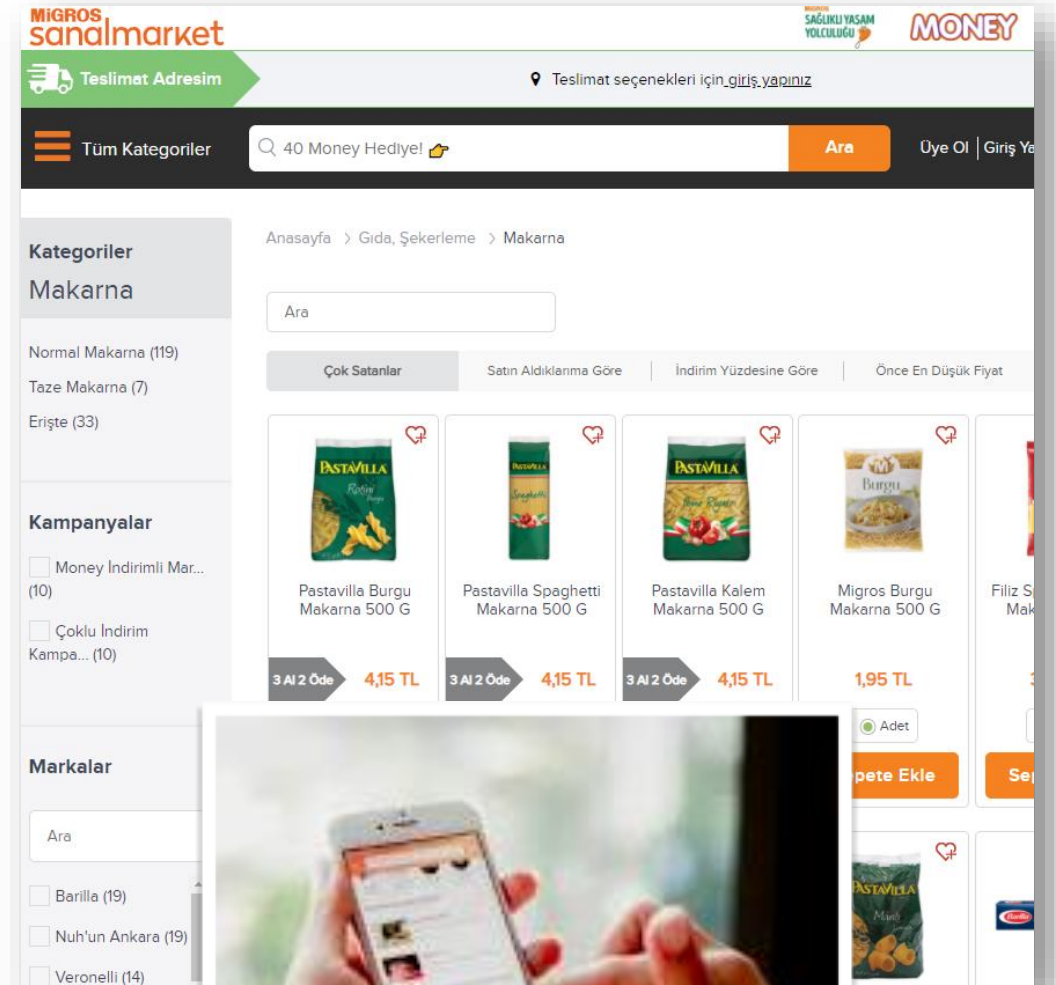
3 + 1 S

Packaging should be obliged to achieve this mission **sustainably** to protect Environment and Natural Resources.



Future Market Growth

- Era of online shopping
- Shopping through small screens
 - **Packaging & Logistics**





Consumers demand an Increase in Life Expectancy



There is no way back from Packaging
Let us redesign and use it Properly!

Thank you

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