

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



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**RosUpack 2024, 18 - 21 Jun 2024, Moscow**

## Content

- Turkish Packaging & Machinery Industry
- ASD
- Packaging
- Sustainability
- Conclusion







# Turkish Packaging Industry



# Türkiye in a nutshell

- A powerful regional presence in the **Eurasian** landmass with strong historic, cultural and economic influence in the area between **Europe** in the west and **Central Asia** in the east; **Russia** in the north and **the Middle East** in the south, Türkiye has come to acquire increasing strategic significance.





- **85 million population increasing 1 %** every year.
- Number of cities populated over 1 million = **24 / 81**
- The population is **young** and highly dynamic that people can adapt themselves rapidly to novelties and new developments.
- Number of working **women** is increasing
- Family sizes shrink
- Self service offers in distribution channels increase significantly
- You can travel 301 big cities of the World from Istanbul by local airline
- The GDP growth in the World in 2020, 1,8%
- **19th biggest economy**, total GDP 906 billion \$ in 2022
  - Total exports in 2022 : 254 billion 368 million \$
  - Total imports in 2022 : 364 billion 723 million \$

## Turkish Packaging Industry Production (tons)

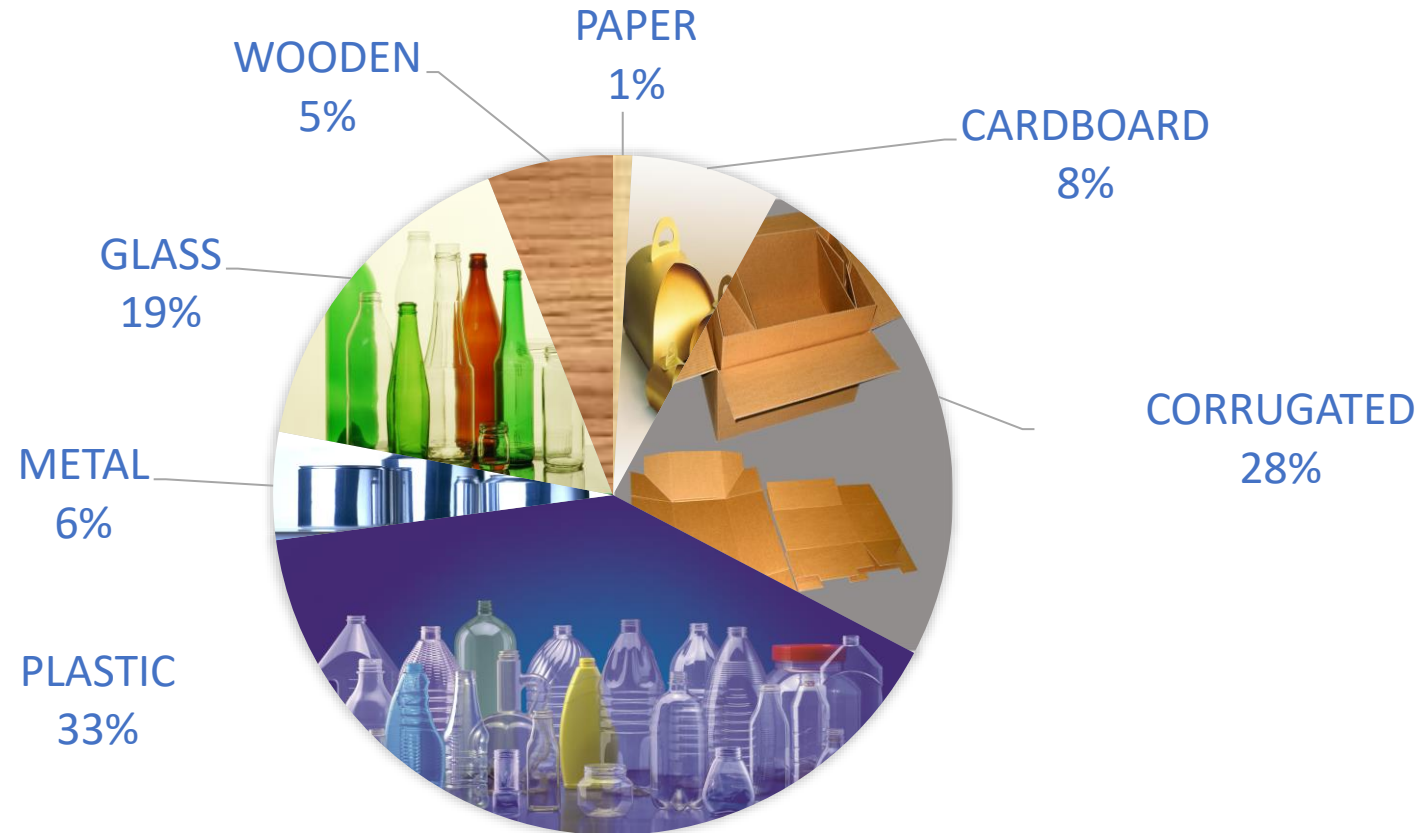
PACKAGING TYPE	2018	2019	2020	2021	2022
PAPER	103,000	99,500	85,400	95,000	103,700
CARDBOARD	660,000	714,000	722,000	755,000	866,000
CORRUGATED	2,300,000	2,282,000	2,880,000	3,050,000	2,917,000
PLASTIC	3,500,000	3,600,000	3,720,000	4,130,000	3,520,000
METAL	430,000	452,000	547,000	578,000	616,000
GLASS	1,560,000	1,640,000	1,800,000	2,000,000	1,960,000
WOODEN	540,000	550,000	550,000	600,000	500,000
TOTAL (tons)	9,093,000	9,337,500	10,304,400	11,208,000	10,482,700

**Approx.: 26 billion USD total revenue, 2022**

**2023 target is 30 billion USD**

**2030 target is 50 billion USD**

# Turkish Packaging Material Production Share in 2022 (% 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**





## World Packaging Sector (USD)

- The biggest consumer is **China - 220 billion USD**, growth rate % 9
- Second **USA - 165 billion USD**, growth rate %2
- Sector shrinks in USA, Canada, Western Europe
- Developing in **China, India, Indonesia, Mexico, Türkiye**
- Countries having sectoral revenue similar to our country are **India, Brazil and Russian Federation (30 billion USD)** that they have population advantage.



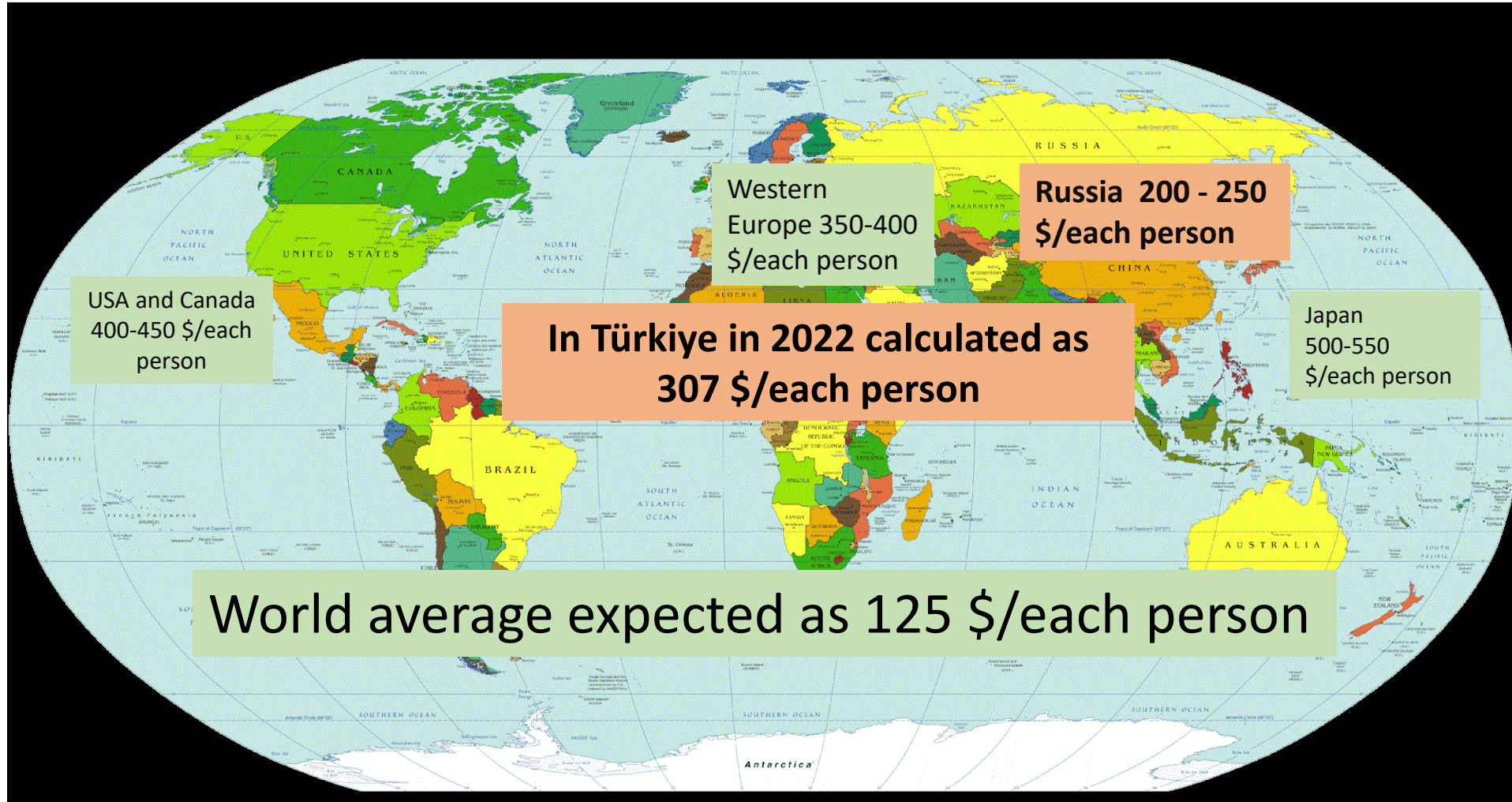
**USD 26 Billion  
Packaging Production enables**



**Economy of min. USD 455 billion in our country**



# Per Capita Consumption (USD / person)

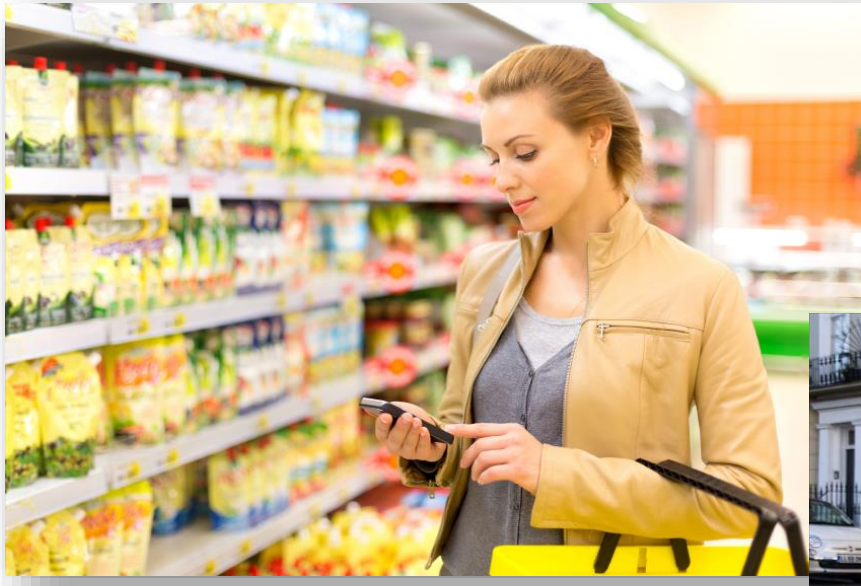




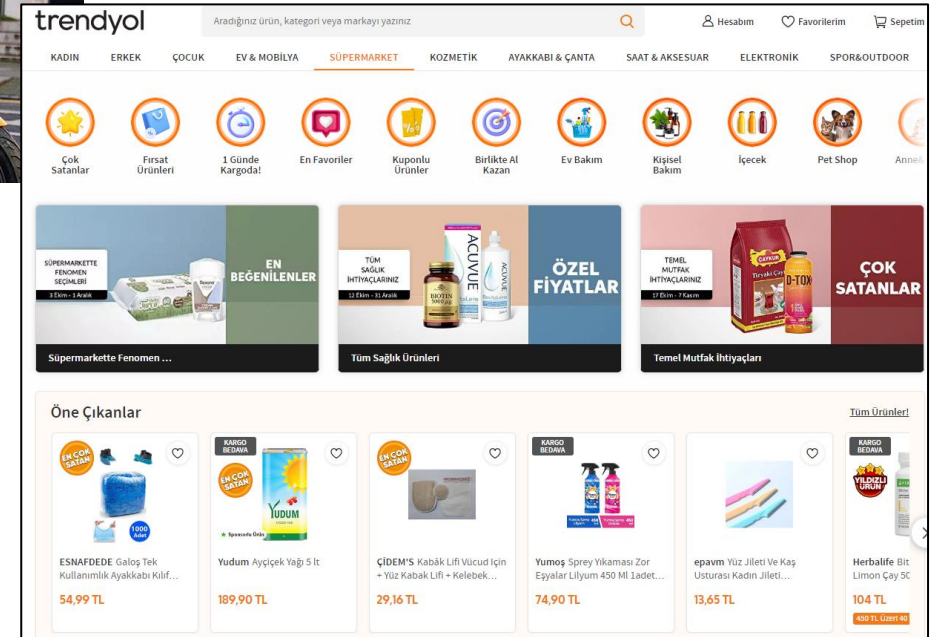
# Packaging Sector



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

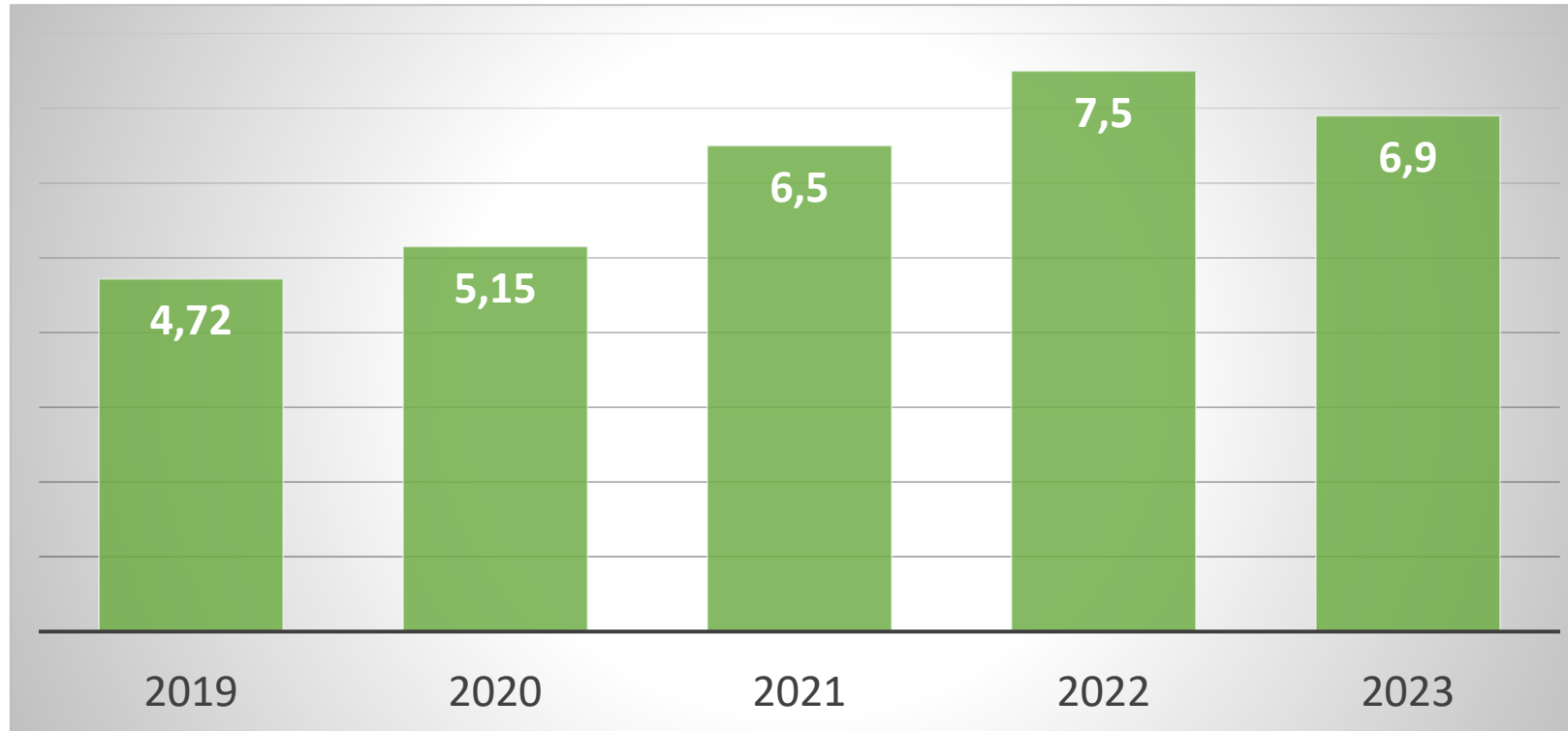


Per capita consumption;  
**307 \$**



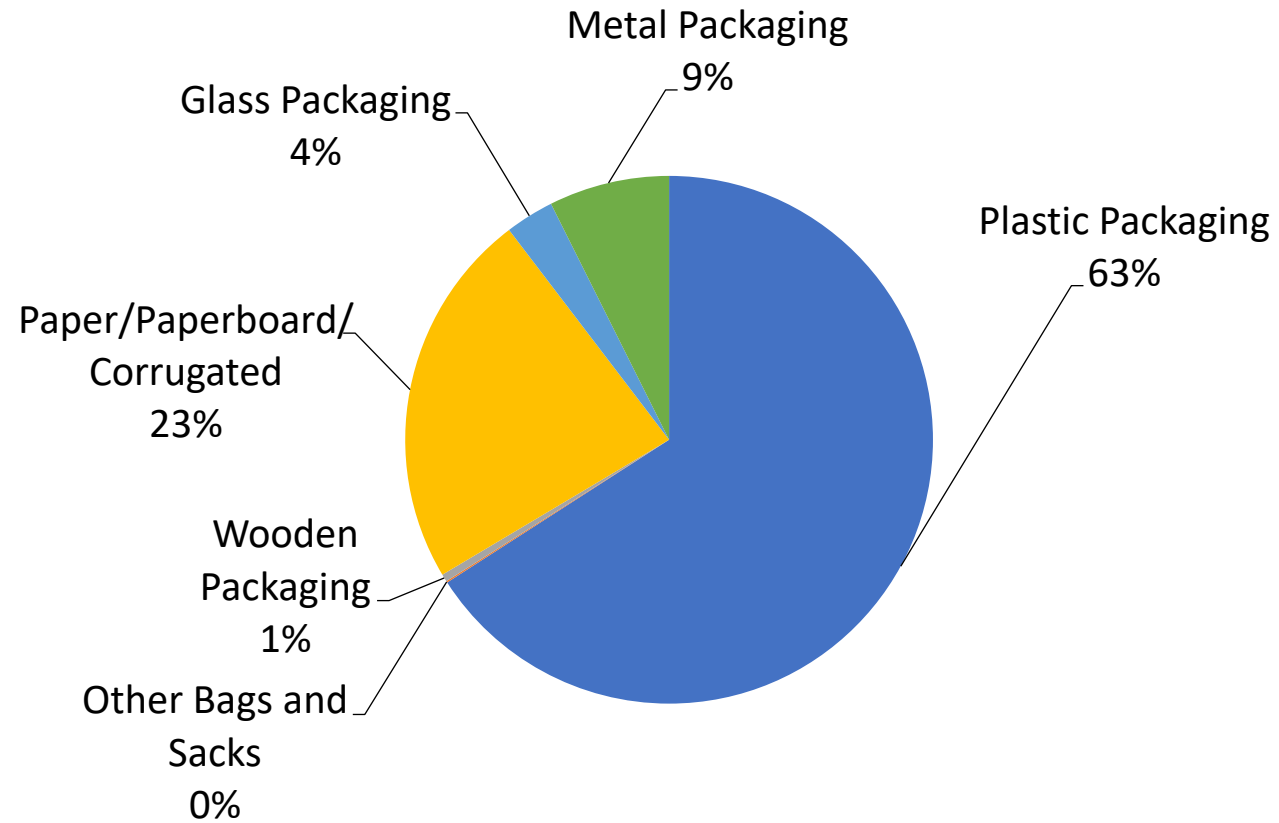


## Packaging Sector Exports (billion USD)

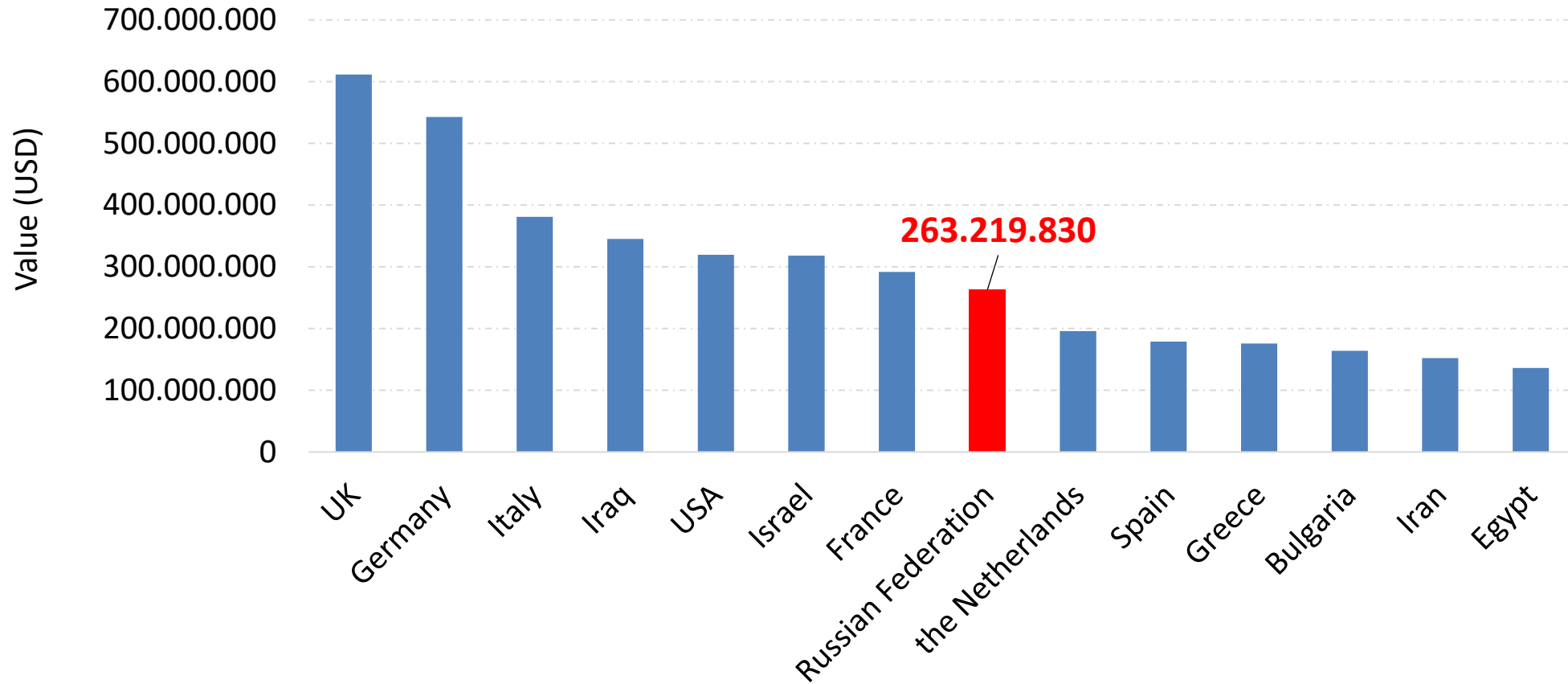


**In 2023 : 6,9 billion \$ exports**  
**Our target for 2024 : 8-10 billion \$ exports**

## Exports Share by Packaging Type in 2023 (USD)



## Top 14 Countries in Exports in 2023



# Export

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





## Packaging Sector Imports (billion USD)

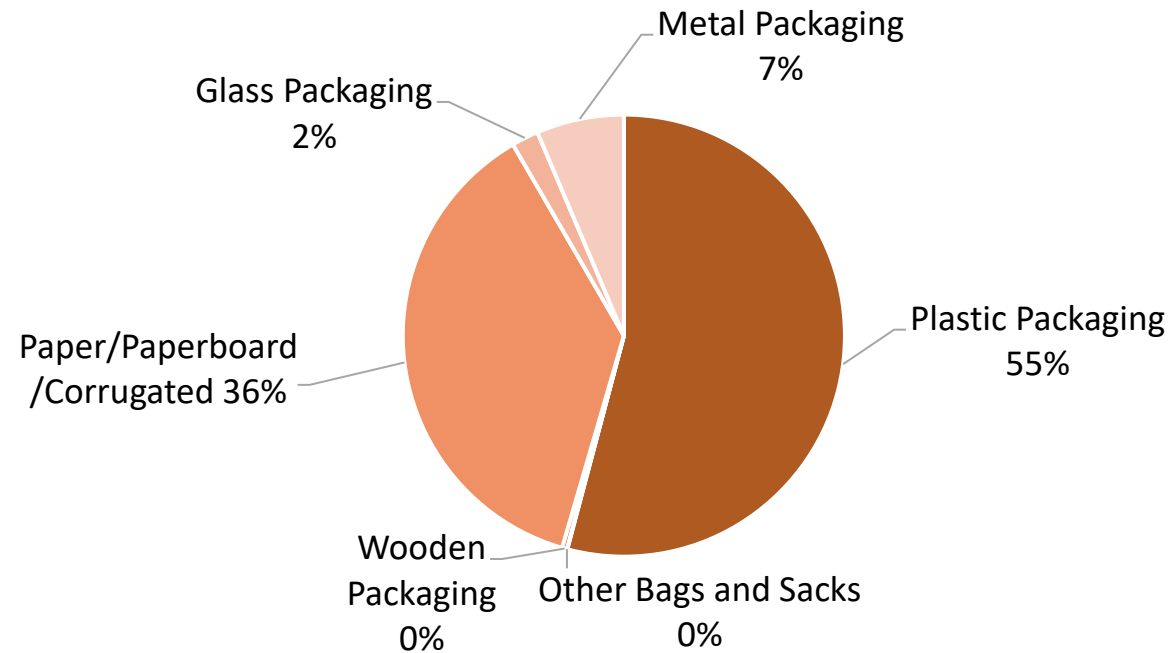


The majority of Packaging Imports are semi-finished products and raw materials.

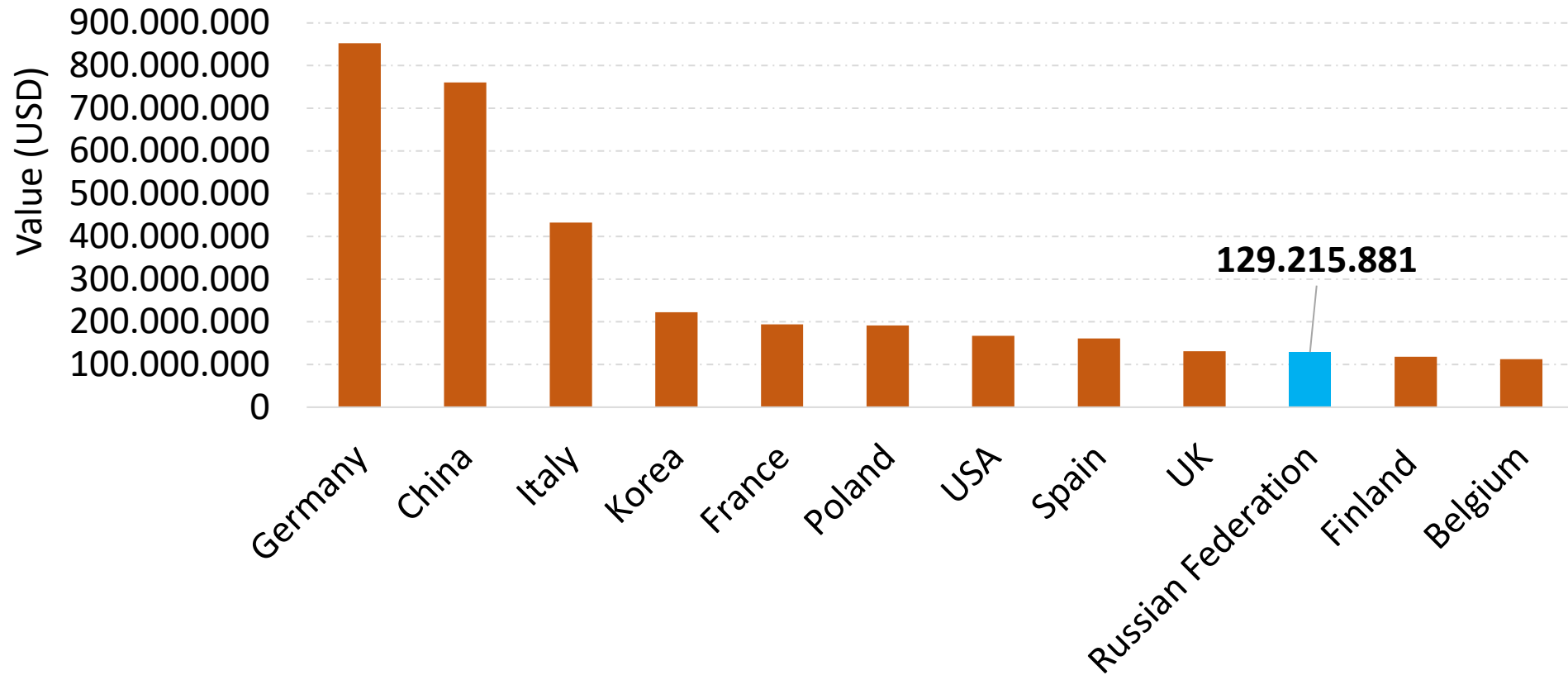
**In 2023 4,6 billion \$ imports**

**Foreign trade surplus was + 2,3 billion \$**

### Imports Share by Packaging Type in 2023 (USD)

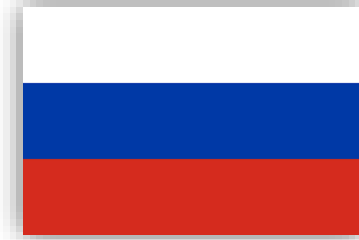


## Top 12 Countries in Imports in 2023



# Import

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



# In Summary..

- More than 10 million tons production,
- 26 billion \$ market size,
- 307 \$ per capita consumption.



- 3 million tons empty packaging exports to 180 countries,
- 6.9 billion \$ exports revenue,
- 2.3 billion \$ foreign trade surplus.





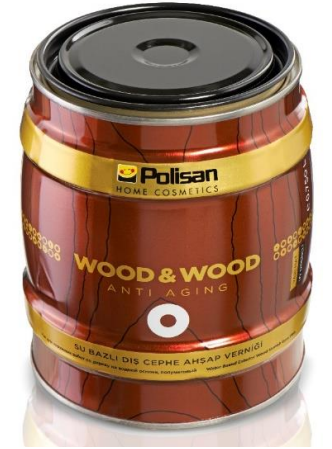
## STRENGTHS AND WEAKNESSES OF THE INDUSTRY

### Strengths:

- Packaging has become fundamental material.
- The increase in large supermarkets, discount stores and other retail chains demands packaged products so packaging sector develops.
- Packaging has a very important place in the marketing of developing industries and agricultural products and export goods in our rapidly growing country.



The Turkish manufacturing industry is expanding and the Turkish packaging industry can respond to the expansion in the manufacturing industry in Türkiye and in the world.



## STRENGTHS AND WEAKNESSES OF THE INDUSTRY

### Weaknesses:

- Insufficient raw material producers.
- Waste management etc. some legislation that does not prevent the development of the industry, is suitable for the conditions of our country and is not structured with the unique practices of our country.
- Offering unpackaged food and beverage products.
- Shortage of trained intermediate staff in the packaging industry.

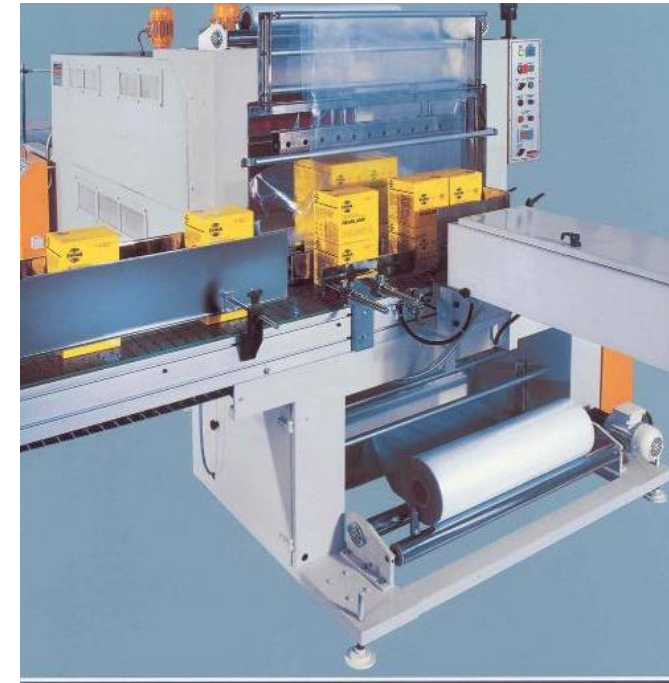






# Turkish Packaging Machinery Industry





Full automatic wrapping machinery

Automatic shrink packaging machinery

Lines and single machinery for metal barrel production



Cups and other containers filling and closing machineries



Automatic cardboard folding and glueing lines



Labelling machines



Robotic Palletizing and Depalletizing Systems



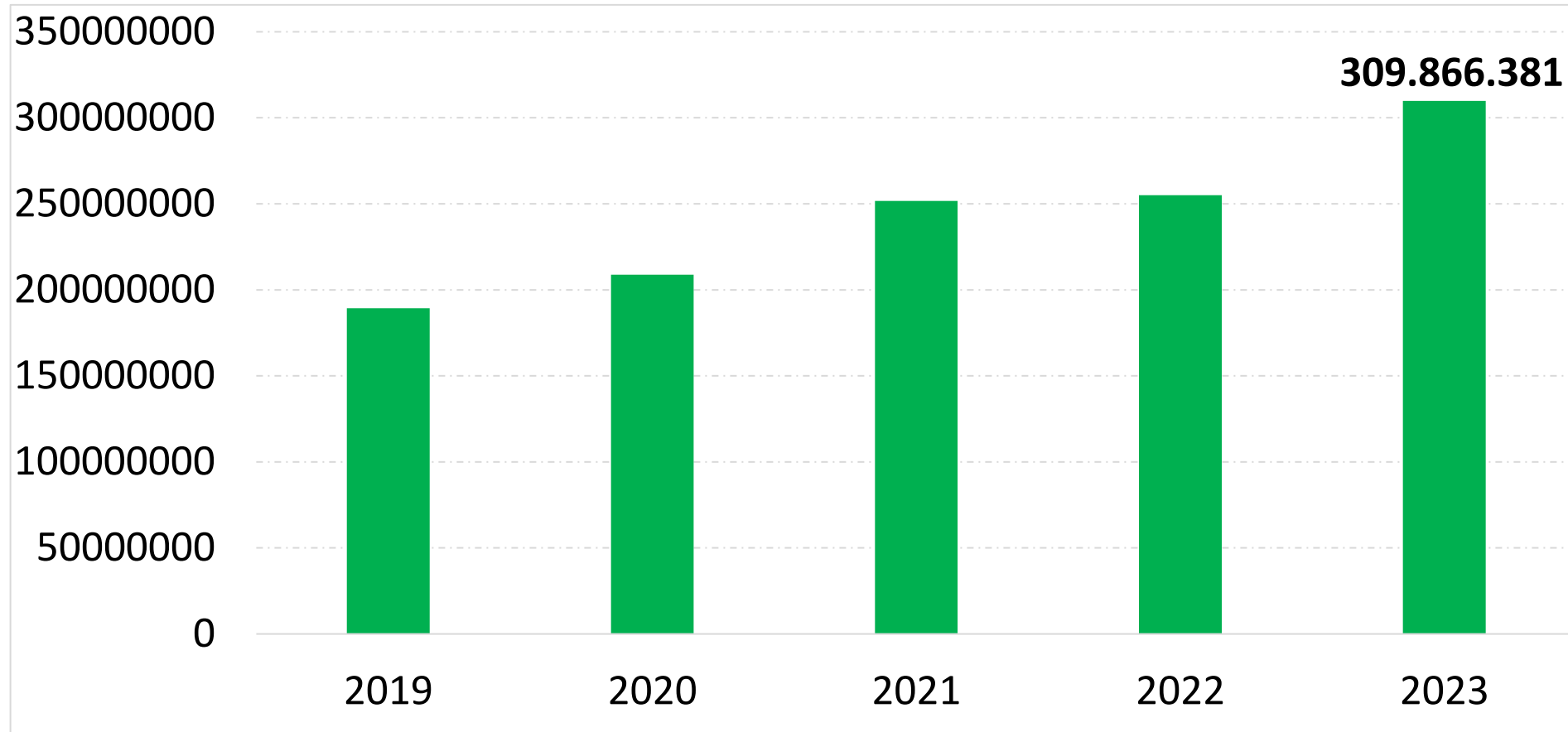
*Horizontal toz ve likid dolum makinaları*



Automatic capping machines

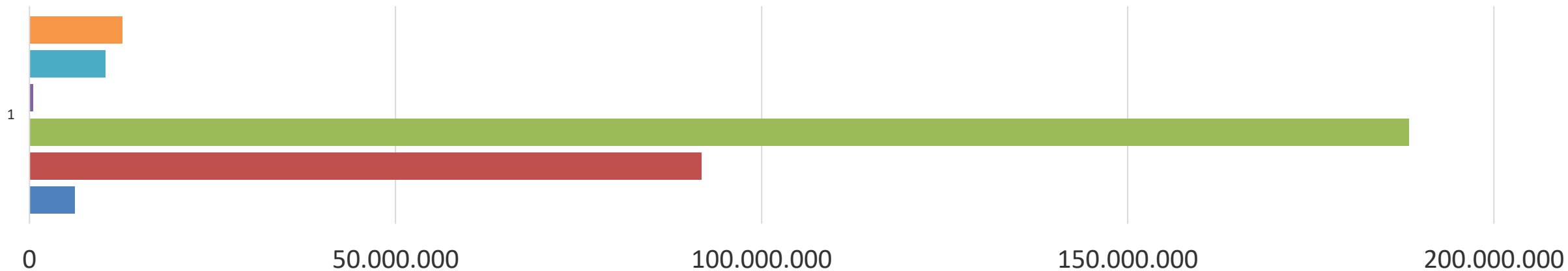


## Packaging Machinery Exports (million USD)





### Distribution of Export Products per Packaging Machinery Type 2023 (USD)



■ Machines for making boxes, tubes, drums, etc containers

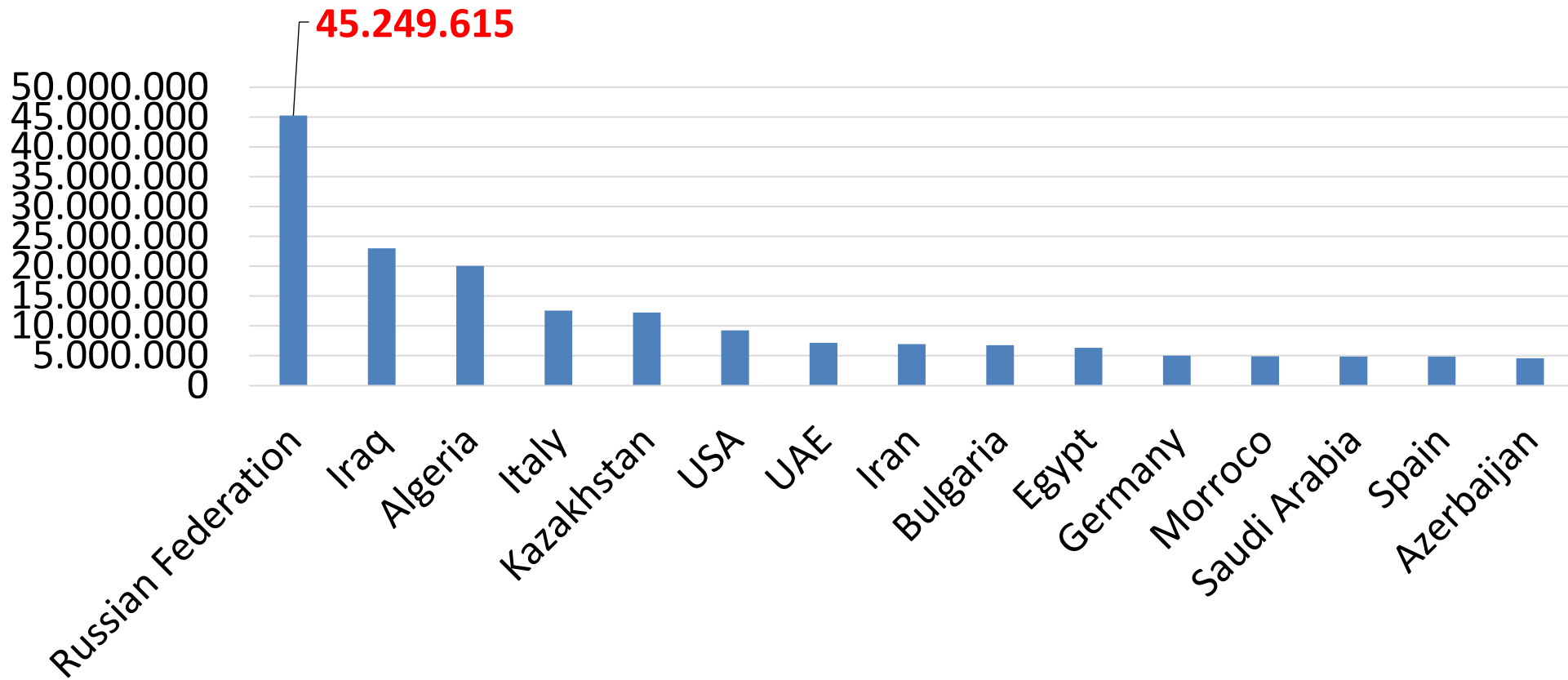
■ Machines for making envelopes, paper bags

■ Weighing and labelling machines; weighing capacity < 30 kg.

■ Other packaging machines (including machines for heat shrink packaging)

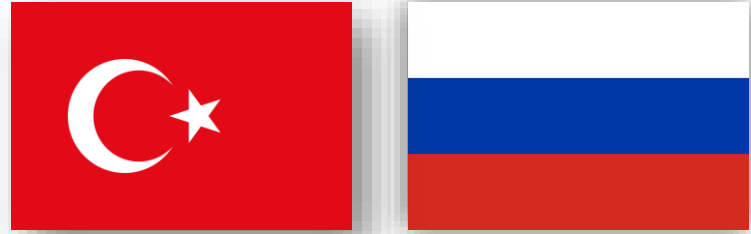
■ Machinery for filling, closing, sealing or labelling bottles, cans, boxes, bags or other containers; machinery for capsuling bottles, jars, tubes and similar containers; machinery for aerating beverages

## The Top 15 Countries in 2023 - Packaging Machinery Export (USD)



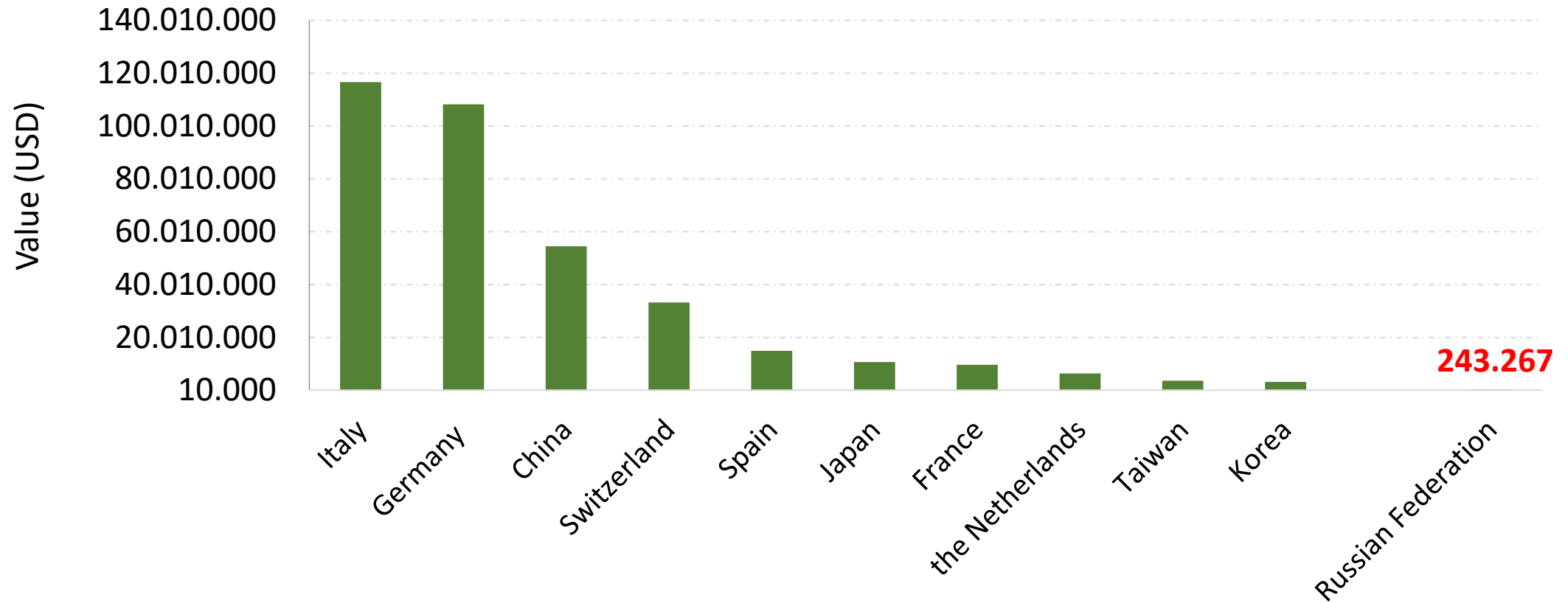


## Export

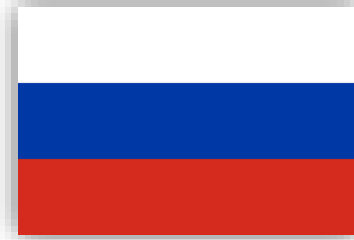


- Machines for cleaning/drying bottles or other containers
- Machinery for filling, closing, sealing or labelling bottles, cans, boxes, bags or other containers; machinery for capsuling bottles, jars, tubes and similar containers; machinery for aerating beverages
- Other packaging machines (including machines for heat shrink packaging)
- Weighing and labelling machines; weighing capacity < 30 kg.
- Machines for making envelopes, paper bags
- Machines for making boxes, tubes, drums, etc containers

## The Top 10 Countries & Russia in 2023 - Packaging Machinery Import (USD)



## Import



- Machinery for filling, closing, sealing or labelling bottles, cans, boxes, bags or other containers; machinery for capsuling bottles, jars, tubes and similar containers; machinery for aerating beverages
- Other packaging machines (including machines for heat shrink packaging)

# Packaging Machinery

- Packaging - Packaging Machines are of great importance. The packaging process is an integral part of modern food production.
- Packaging protects food products, prevents their properties from deteriorating and makes it possible to transport them.
- Therefore, the majority of manufactured packaging machines are used by the food and beverage industry.
- Other important customers include the cosmetics, pharmaceutical and chemical industries and the entire consumer goods sector.

# Packaging Machinery

- Packaging exports and Packaging Machinery exports are actually directly related to each other. Packaging machines can also be sold to the country where the packaging is sold.
- As a country grows, the use of packaging and the demand for packaging and packaging machines are increasing rapidly, while machinery imports are also increasing, especially from Western Europe & Japan which the machinery sector is developed and very experienced; Imports from China are also noteworthy for Türkiye.





**ASD Turkish Packaging Manufacturers Association**





# ASD members

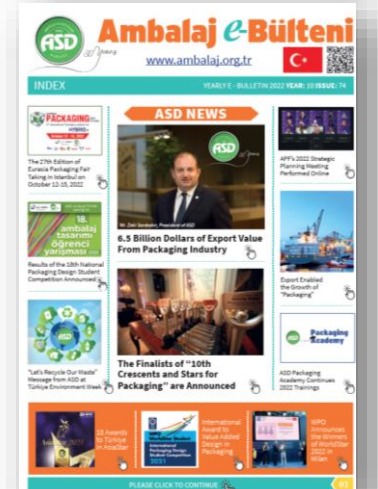
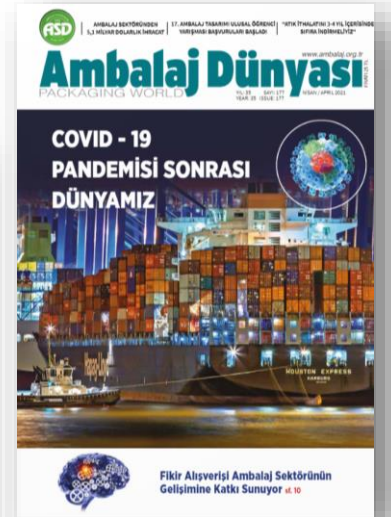
> **260 companies :**

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



# Activities

- Exhibitions - Eurasia Packaging Show in Istanbul, RosUpack, etc..
- 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





## 70% used for

- food and drink,
- healthcare,
- cosmetics,
- other consumer, products

**Other 30%, used for industrial purposes.**



# The Purpose of Packaging

- Primarily to **protect** or **preserve** its contents and,
- Secondly to improve the products **presentation**.



Packaging is the **Dress** of Product



Packaging is the **Shield** for food



# The Purpose of Packaging



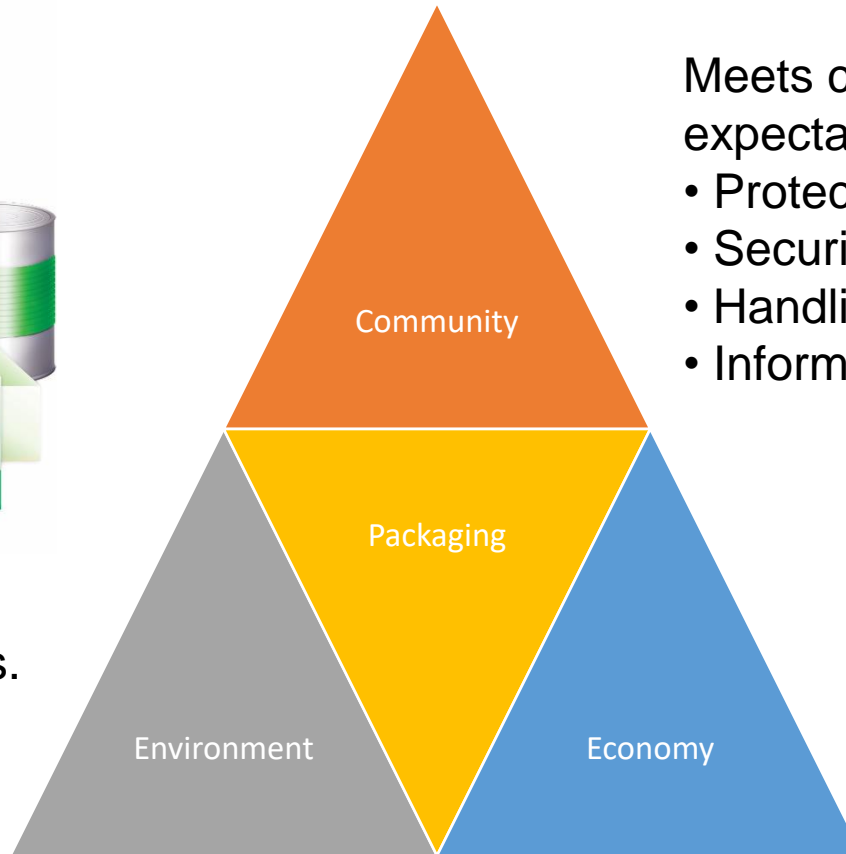
- The ultimate and real purpose of modern packaging is set by the modern and liberal world as:  
**Improve the life standard of the consumers.**
- Packaging is a strategical tool for trade;  
Packaging Industry enables marketing of **industrial** and **agricultural** products







Saves resources more than it uses.



Meets consumers expectations:

- Protection
- Security
- Handling
- Information

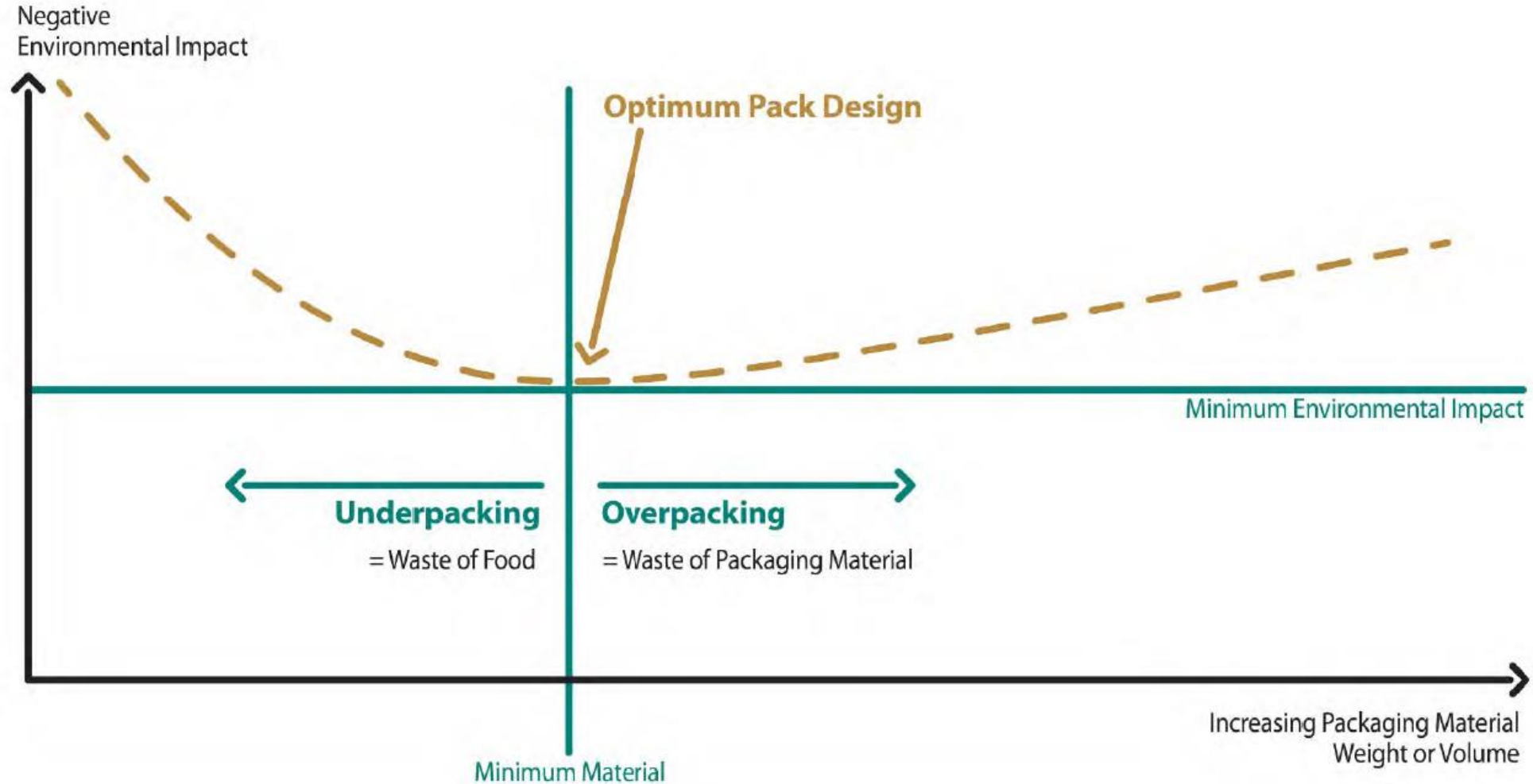


Puts products on the market.

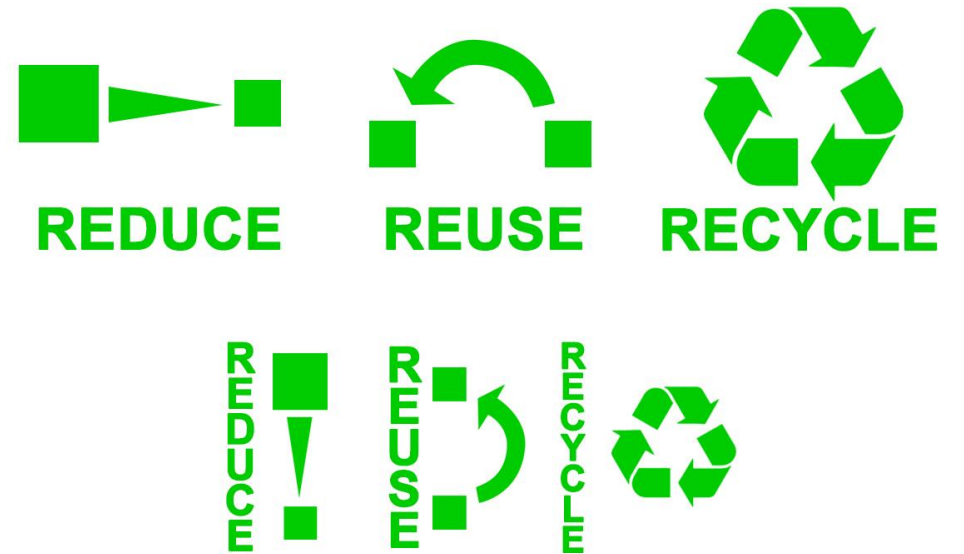
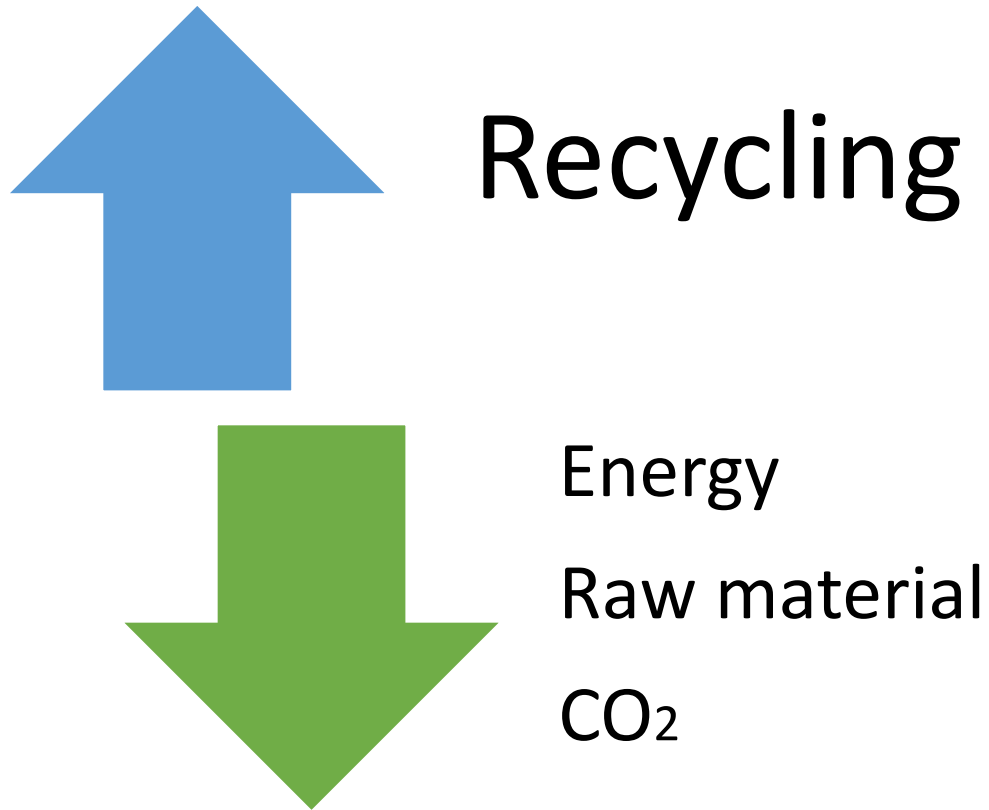
Recovery brings money.



# Underpacking as Danger



- Recycling should be considered the last line of defence.



# When you recycle packaging, you will have less CO<sub>2</sub> Emissions



Material Recycling (1,000 kg or 1 ton)	Saving Greenhouse Gas / CO <sub>2</sub> 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 & recyclability.**





Surrounds , Saves , Sells

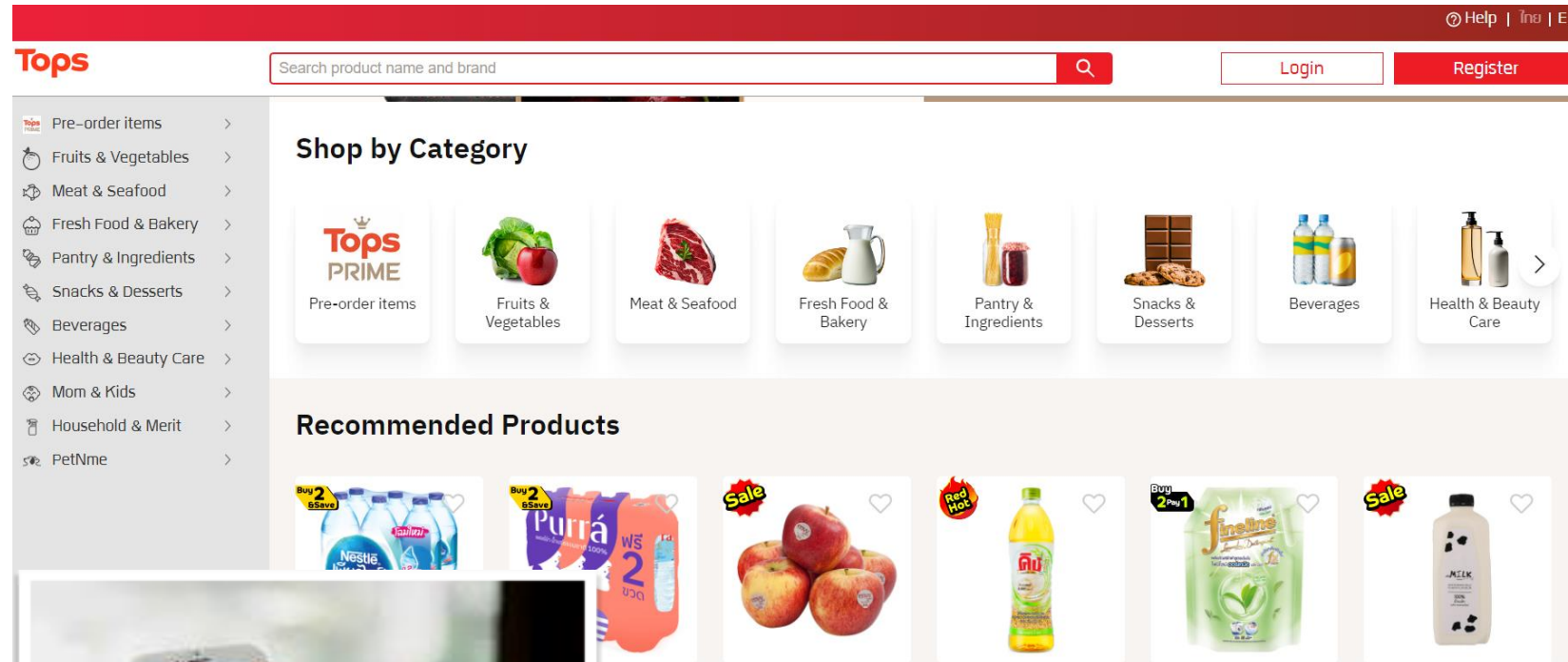
3 + 1 S

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**



## Consumer demands 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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