



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.

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.

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 3.7 billion dollars in 2015. 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 2015 the largest packaging group exported was plastic packaging products with a share of 59,4% in total exports in the packaging industry. The total export value of these packaging products reached 2,2 billion USD in 2015.

Table:1 Packaging Exports by Products (Value: US \$ 1.000)

H.S. No.	Packaging Materials	2015	2016	2017	Major Export Markets in 2017
3919	Self-adhesive plates, sheets, film, etc. of plastic w/n in rolls	115.259	113.323	99.121	Germany, Iran, France
3920	Other plates sheets, film, foil,tape, strip of plastics etc.	914.227	923.189	976.153	Germany,UK,France
3921	Plates, sheets, film, foil and strip, of plastics	385.556	401.856	415.856	Iran,Netherlands,Bulgaria
3923	Plastic packaging of goods, stoppers, lids, caps and others	809.037	809.140	889.762	Germany,Iraq,Israel, UK
4415	Packaging materials of wood	31.182	29.710	28.573	Jordan,Freezones,Germany, Italy
4416	Casks, barrels, vats, tubs and etc. of wood	151	117	100	Israel,Iraq,Saudi Arabia
4804	Uncoated kraft paper and paperboard, in rolls /sheets	9.274	11.322	13.654	Iraq, India, Poland
4805	Other paper and paperboard, uncoated, in rolls	97.859	112.611	164.946	UK, Italy, Greece
4806	Vegetable parchment, greaseproof papers, tracing papers and glassine	4.676	3.453	4.331	Freezones, Morocco
4807	Composite paper and paperboard , not surface coated or impregnated	6.286	6.856	7.592	Russia Fed., UK, India
4808	Corrugated paper and paperboard, creped,crinkled,embossed,perforated	4.796	6.333	7.282	Iraq,Georgia
4811	Paper, paperboard, cellulose wadding and webs of cellulose fibres, coated	218.823	239.154	208.012	Egypt, Iran, Tunisia
4817	Envelopes, letter cards, plain postcards stat of paper, box,wallet	12.174	12.669	11.844	Germany,UK,Sudan
4819	Cartons, boxes, cases, bags and other packing containers, of paper, paperboard,	335.266	396.257	471.128	UK, Iraq, Iran

4821	Paper or paperboard labels of all kinds, whether or not printed	53.552	53.052	52.670	Egypt,Freezones, Georgia
4823	Paper, paperboard, cellulose wadding and webs of cellulose fibres	47.465	47.174	54.808	Bulgaria, France, Netherlands
6305	Sacks and bags, of a kind used for the packing of goods, of all types of textile materials	330.302	316.605	338.214	Germany, France
7010	Carboys, bottles, flasks, jars, pots, phials, ampoules and other containers, of glass, of	32.162	58.134	61.681	Italy, Iraq
7309	Reservoirs, tanks, vats and similar containers, of iron or steel, vats	96.182	83.356	77.863	Turkmenistan, Iraq,India
7310	Tanks, casks, drums, cans, boxes and similar containers, of iron or steel, for any material ...	122.306	112.155	123.742	UK, Netherlands, Israel
7612	Casks, drums, cans, boxes and similar containers, incl. rigid or collapsible tubular containers, ...	66.621	63.557	77.314	Egypt, Greece, Israel
7613	Aluminium containers for compressed or liquefied gas	9.455	9.455	13.197	France, Germany, UK
8309	Stoppers, caps and lids, incl. crown corks, screw caps and pouring stoppers, capsules for bottles, ...	38.154	38.154	47.500	Bulgaria, Israel, Jordan
Total		3.739.118	3.847.632	4.415.356	Germany, UK, Iraq, Iran,France

Table:2 Packaging Exports by Products (Value: US \$ 1.000)

Countries	2015	2016	2017
Germany	287.158,00	308.846,00	322.118
United Kingdom	269.483,00	253.447,00	26.484
Iraq	244.219,00	252.317,00	293.040
Iran, Islamic Republic of	137.454,00	166.790,00	164.350
France	167.516,00	164.239,00	165.853
Italy	137.453,00	149.944,00	157.943
Israel	130.540,00	148.179,00	165.497
Egypt	113.841,00	131.346,00	120.412
Netherlands	128.787,00	129.383,00	133.619
Bulgaria	87.545,00	100.221,00	98.455
Romania	88.338,00	94.822,00	99.385
United States of America	81.606,00	91.955,00	120.638
Spain	82.667,00	91.721,00	94.825
Greece	83.113,00	89.304,00	86.653
Tunisia	63.259,00	72.168,00	75.011
Belgium	67.255,00	70.806,00	75.011
Poland	63.576,00	70.246,00	73.979
Saudi Arabia	67.584,00	69.051,00	70.030
Azerbaijan	99.430,00	69.050,00	73.351
Georgia	66.877,00	63.230,00	69.265
Morocco	48.839,00	51.175,00	53.814
Algeria	50.282,00	51.140,00	59.696
Russian Federation	81.773,00	47.399,00	63.040
Libya	53.574,00	45.627,00	47.918
Jordan	44.389,00	45.503,00	48.392
Serbia	39.530,00	43.495,00	37.490
Ireland	36.028,00	38.932,00	42.490
Sweden	35.154,00	37.471,00	40.419
Hungary	26.451,00	34.073,00	38.982
Turkmenistan	36.256,00	34.062,00	25.837
Ukraine	28.695,00	32.959,00	29.690
Syrian Arab Republic	55.356,00	32.405,00	39.608
Czech Republic	28.337,00	32.126,00	30.343
South Africa	30.610,00	31.476,00	25.691
Austria	34.022,00	31.318,00	7.673
United Arab Emirates	34.106,00	30.133,00	29.665
Uzbekistan	25.417,00	27.149,00	34.837
Total World	3.739.118,00	3.847.632,00	4.415.356

TRADE FAIRS

- [Fairs in Turkey](#)

USEFUL LINKS

- Packaging Manufacturers Association
www.ambalaj.org.tr
- Corrugated Board Manufacturers Association
www.omud.org.tr
- Label Manufacturers Association
www.esd.org.tr
- Carton Board Packaging Manufacturers Association
www.kasad.org.tr
- Flexible Packaging Manufacturers Association
www.fasd.org.tr
- Packaging Machine Manufacturers Association
www.amd.org.tr
- Association For Recyclable Packaging Materials Collectors And Separators
www.tudam.org.tr
- Rigid Plastic Packaging Manufacturers Association
www.sepa.org.tr



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www.economy.gov.tr

ihticari@ekonomi.gov.tr

Call Center
+90 850 808 04 04