PAGEV

TURKEY

PLASTICS PACKAGING MATERIALS FOLLOW - UP REPORT

2015 / 9 MONTHS

1989
PAGEV®

EXECUTIVE SUMMARY

Production of plastics packaging materials shares between 40 – 53 % in total plastics goods manufactured in leading countries. This ratio is about 40 % in Turkey, while the world average is 46 %, respectively. More than 1/3 of all products in developed countries is packaged with a plastics materials so that, after the paper and cardboard, having the biggest market share. In terms of volume, 55% of the packaging is flexible and 45 % is rigid However, this position is reversed in terms of value. Annual consumption value of rigid packaging is 30 billion euros in the Europe while flexible packaging shares the value of around 10 billion euros.

In Turkish plastics packaging materials industry, in the 9 months of 2015 compared to the peers period of 2014; production decreased by % 0,08 and domestic sales % 3,2 while the imports increased by % 0,02 and exports by % 10,1 on unit base. In this period, 24 % of total production was exported, % 14 of domestic consumption was met by imports while the export import coverage ratio realized as 87 %.

On the other hand, in the same period, production decreased by 13,8 %, imports by % 10,7 exports by % 7,8 on value base. 19 % of the total production was exported while % 16 of domestic consumption was met by imports. Import – export covarage ratio realized as % 129

At the end of 2015, compared to 2014; it is expected that production will increase by 0,9 %, imports by % 0,8, exports by 9,5. However, domestic consumption will decrease by % 1,2 on unit base.

On the other hand, production is expected to decrease by 11,8 %, imports by 10 %, exports 7,1 % and domestic consumption by 10,1 % on value base.

World packaging industry is very large and big industries and the plastic packaging industry has an important place in the economies of the countries. In parallel with the rapid development of plastic packaging, plastic industry has become an essential part of our daily lives. Key to this success, is the best way to maintain supply capability and low weight due to the cost savings as a result.

Plastics, through innovative technologies, are becoming increasingly sophisticated, lightweight, versatile and has replaced the traditional packaging materials such as glass and paper in many areas. Previously, classical materials such as paper, glass, and traditional packaging materials such as wood, cellulose acetate and cellophane transparent cellulose film were used, plastic packaging materials placed with polyethylene in the 1950's and has been widely used. Rapid increase in the use of plastics has been realized with the development of polystyrene, polypropylene, PVC, polyester and polyethylene copolymers.

Despite the size and economic importance of the industry (especially SMEs) of the plastic packaging industry is currently under significant pressure two. On the one hand to determine the price of plastic raw material suppliers, notably in the food industry as well others, great pressure is applied to the lowering of prices by customers. In addition, in many countries, especially in Eastern Europe, particularly if they have a quality manufacturer of extrusion and printing facilities at lower costs and therefore competition in these countries are known to increase rapidly. Competition from others, especially from the Far East side barrier material and printing technology is a growing field.

Food packaging materials constitute 54 % of the total packaging market plastic packaging are known to be the most important growth market in the coming years. Demographic developments, such as one - and two people live and increasing the older homes will contribute to the market growth.

Innovation is a key factor for success in this industry. Easy to use in order to develop new products to market in plastic packaging industry using intensive R & D will have a strategic advantage over its competitors. Plastic packaging industry will benefit from R & D in developed countries, as well as in new markets.

TURKISH PLASTIC PACKAGING MATERIALS INDUSTRY

Packaging materials are generally defined as wrapping, storing, stocking, carrying and selling the manufactured products in a most reliable and hygienic ways. In this way packaging materials add values to the packed products. From this perspective, the development of packaging industry and packaging consumption per capita is generally accepted as an indicator of development.

Plastic packaging is not only safe but also very practical and more efficient. The exact amount of the recovery in output, produced in 2013, which compares packaging containers produced in 1991 has been stated in a study conducted by the GVM's. The striking result of this study is : to replace 3.7 million Tonss of plastic packaging in Germany has only consumed 2.76 million Tonss, which corresponds to a saving of almost a million Tons. This material saving, innovative packaging solutions with more stringent legal requirements relating to the trade in terms of food and divisibility and durability has been achieved despite the growing demands of consumers.

In EU zone, nearly 63 % of all consumer goods are transported in plastic packaging materials. However, plastic packaging accounts for only 24% of the amount of all packaging. This clearly demonstrates the higher efficiency of the plastics packaging material than the others.

TURKISH PLASTIC PACKAGING PRODUCTION CAPACITY

In plastic packaging industry, lots of companies manufacture lots of different products, and manufacturing capacities of companies in terms of products cannot be defined over a certain unit. According to the TOBB (The Union of Cahmbers and Commodity Exchange of Turkey) database, total manufacturing capacity of 1854 registered companies is defined as: (1.188.2008 Tonss + 2.626.400.207 m^2 + 421.630.400 meters + 4.497.991 pieces)

Plastics packaging sector is made up of flexible plastic by 67 %, textile plastic by 18%, and hard plastic packaging products by 15 %.

PRODUCTS	NO OF COMPANIES	TONS	M^2	METER	1000 UNIT
PLASTIC FILM	205	200.639	1.036.345.507	421.630.400	
SHEETS	137	128.243	342.572.240		
BOTTLES AND CAPS	235	86.589			2.008.991
STORAGE CONTAINERS	543	279.737			1.648.000
PACKING BAGS	734	493.000	1.247.482.460		841.000
TOTAL	1854	1.188.208	2.626.400.207	421.630.400	4.497.991

Source: TOBB DATA BANK

Sheet 1: Installed Capacity of Plastics Packaging Industry

According to the PAGEV records, about 1.450 companies are operating in plastic packaging industry, 61% of which located in Istanbul. More than 10 companies that operate in 14 provinces account for 83% of total companies.

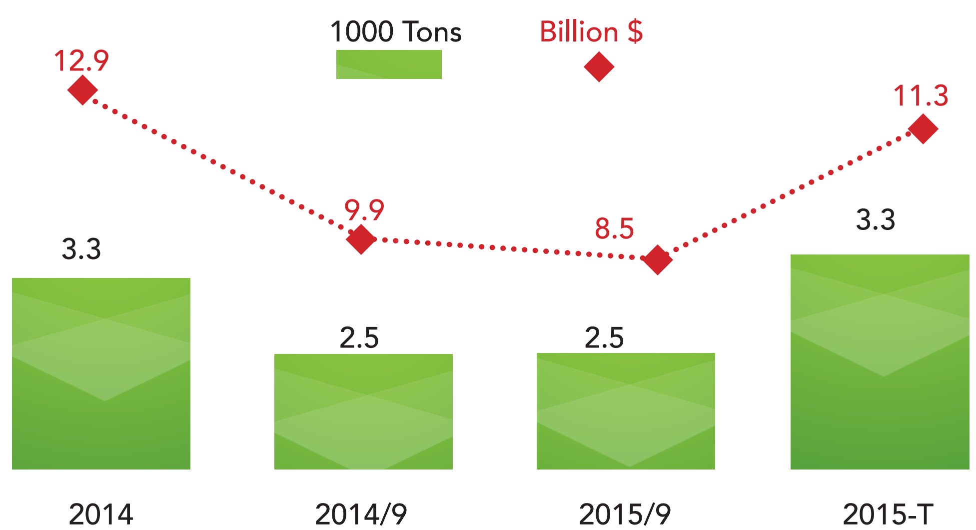
PROVINCE	NO OF COMPANIES	SHARE %
İSTANBUL	871	61
İZMİR	84	6
KONYA	57	4
ANKARA	51	4
BURSA	51	4
G.ANTEP	42	3
KOCAELİ	40	3
ADANA	27	2
DENİZLİ	23	2
MERSİN	17	1
KAYSERİ	16	1
MANİSA	15	1
SAMSUN	13	1
ANTALYA	11	1
OTHER CITIES	105	7
TOTAL OF ENDUSTRY	1.423	100

Sheet 2: Plastics Packaging Materials Manufacturers By Provinces

PLASTICS PACKAGING MATERIALS PRODUCTION

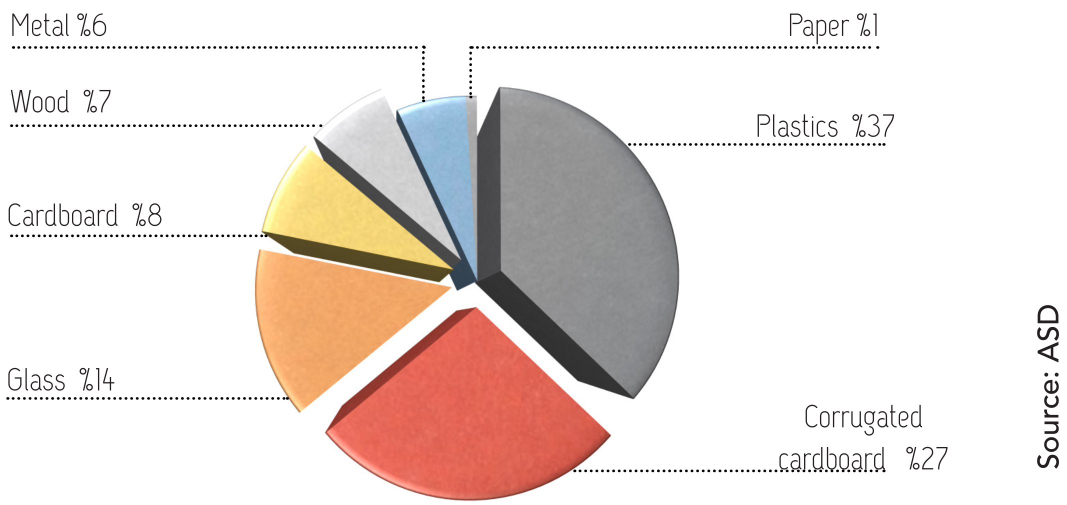
Total production of plastic packaging materials, which was 3,3 million tons and USD billion of 12,9 in 2014, realized as 2,5 million tons and USD billion of 8,5 in the 9 months of 2015, by staying as the same level on unit base and decreasing by 14 % on value base with respect to the peers period of 2014.

It is expected that the production will be 3.3 million tons and USD billion of 11,3 at the end of 2015 by staying at the same level on unit base and decreasing by % 12 on value base compared with 2014.



Form 1: Plastics Packaging Materials Production

According to the data from Packaging Industrialists Association (ASD) in Turkey, the share of plastic packaging sector in total packaging industry is 37%.



Form 2: Packaging Industry Production by Materials

Plastics packaging foreign trade can be examined by 4 custom duties code numbers specified as follows.

HS NO	THE MATERIALS GROUPS OF PLASTICS PACKAGING INDUSTRY
3919	ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT
3920	OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC
3921	OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC
3923	PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE

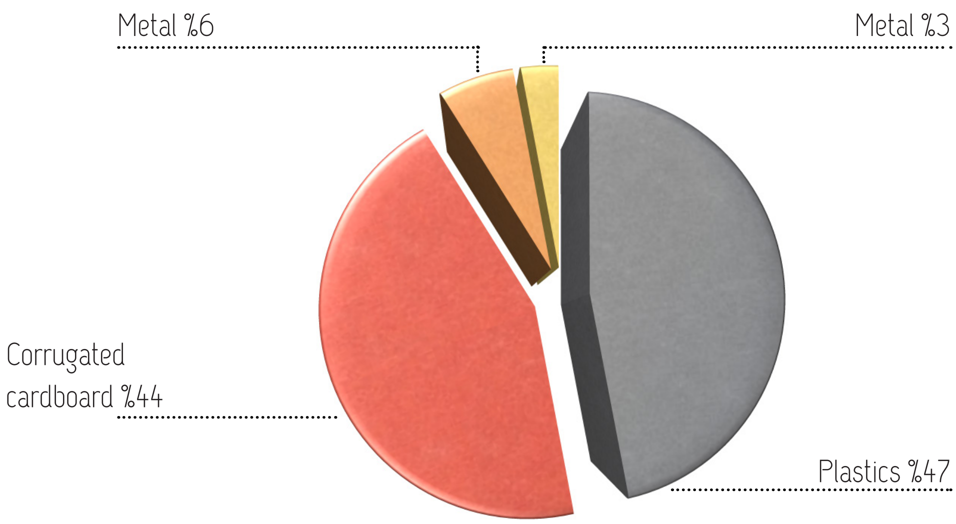
Source: TUIK

Sheet 3: The Materials Groups of Plastics Packaging Industry

PLASTICS PACKAGING PRODUCT IMPORTS

Although Turkish plastics packaging is sufficient to meet the requirements of the domestic manufacturing industry with its structural and technological aspects, the materials are imported come with their own packaging materials. As new products begin to be manufactured in Turkey, their packaging materials will be produced in Turkey and market volume will grow accordingly.

According to the ASD - Packaging Manufacturers Association records, the share of total imports of plastics packaging industry is 47% in total packaging imports.



Source: ASD

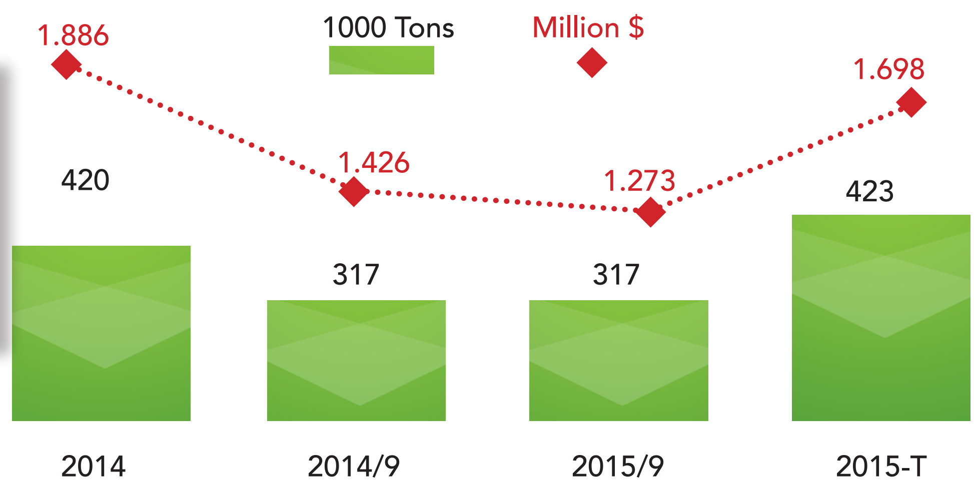
Form 3: Share of Plastics Packaging Materials in Total Packaging Imports

The imports of plastics packaging materials which was 420 thousand tons and USD billion of 1,9 in 2014, realized as 317 thousand tons and stood at USD bilion of 1,27 in the 9 months of 2015 by increasing % 0,02 in unit base and decreasing by % 11 on value base compared to peers period of 2014.

The imports are expected to be 423 thousand tons and USD billion of 1,7 at the end of 2015 increasing by % 1 on unit base and decreasing by % 10 on value base compared to 2014.

PLASTICS PACKAGING PRODUCT IMPORTS

Form 4: Plastics Packaging Materials imports



The imports of all sub groups of plastics packaging except the materials in HS no 3923 increased by between % 0,1 - % 1,5 on unit base, however decreased by between % 8 - % 15 on value base, in the 9 months of 2015 compared to peers period of 2014.

Sheet 4: Plastics Packaging Matrials Imports (Tons)

HS NO	2014	2014/9	2015/9	2015-T	İNCREASE % 2015/2014 (9)	İNCREASE % 2015/2014
3919	55	42	43	57.0	1.5	2.2
3920	252	192	192	256.0	0.1	1.5
3921	67	49	49	65.0	0.4	-2.7
3923	46	35	34	46	-0.8	0.1
Total	420.0	317	317	423	0.2	0.8

Source: TUIK

PLASTICS PACKAGING MATRIALS IMPORTS

HS NO	2014	2014/9	2015/9	2015-T	İNCREASE % 2015/2014 (9)	İNCREASE % 2015/2014
3919	339	258	236	314	-8.6	-7.2
3920	1.004	774	689	918	-11.0	-8.6
3921	298	205	188	250	-8.4	-15.8
3923	246	189	161	215	-14.7	-12.6
Total	1.886	1.426	1.273	1.698	-10.7	-10.0

Source: TUIK

Sheet 5: Plastics Packaging Matrials import (Million $)

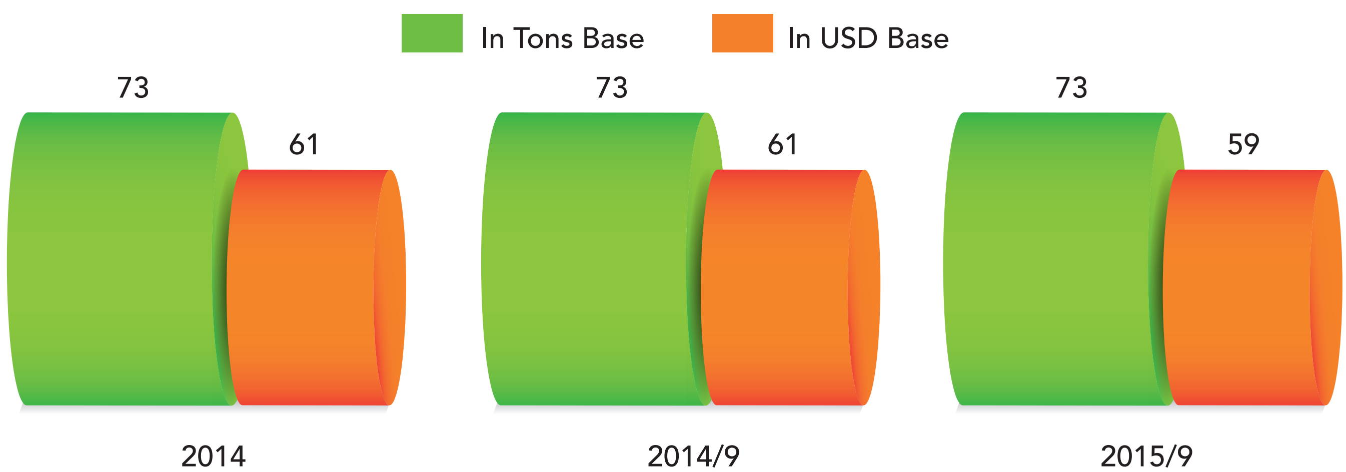
Located in the top 10 plastics packaging materials imports in the 9 months of 2015, are summarized in the following table, 58 % received on unit base and 54 % received on value basis. Imports in the first three rows: are the products described in 392043, 392020 and 391990 HS Codes.

HS CODE	DESCRIPTION	TONS	1000 $	% - TONS	% - $
392043100000	Vinyl chloride polymer in the plate / sheet / film etc; plasticizer ratio => 6%, thickness = <1mm	42	139	13.1	10.9
392020210019	The propylene polymer of the sheet, plate, film, foil and strip; thick <= 0, 10 mm boryent	31	141	9.8	11.1
391990003000	Adhesive sheet, plate, strip, strip, film, foil; The addition polymerization product of> 20cm	19	102	6.0	8.0
391990009000	Adhesive sheet, plate, strip, strip, film, foil; Most of the others> 20cm	10	62	3.0	4.8
392010250000	Other plastic plates, sheets, etc; Polyethylene, specific gravity <0.94, thick <0, 125mm	15	49	4.7	3.9
392190600012	Polyvinyl chloride plates, sheets, film, foil, strip (porous)	19	44	5.9	3.4
392010890000	Other plastic plates, sheets, film etc; ethylene polymers, thick> 0, 125mm	14	41	4.4	3.2
392051000000	Polymethyl methacrylic the plates, sheets, film, foil and strip (non-porous)	12	40	3.6	3.1
392069000000	Other than polyester plates, sheets, film, foil and strip	14	36	4.4	2.8
392043100000	Other plastic plate / sheet / film etc; Poly (ethylene terephthalate) from the first thickness = <0,35mm and others	10	33	3.1	2.6
	Total 10 Products	184	685	58.1	53.8
	Others	133	585	41.9	46.2
	TOTAL	317	1.273	100.0	100.0

Sheet 6: The 10 Main Products in Total Plastics Packaging Materials Imports (2015 / 9)

In 2014, plastic packaging products imports, shared % 73 of total plastics industry imports on unit base and received % 61 share on value base. But in the 9 months of 2015, its share declined to % 72 on unit base and % 59 on value base .

PLASTICS PACKAGING MATRIALS IMPORTS



Form 5: Share of Plastics Packaging Materials in Total Plastics imports (%)

Plastic packaging products are imported from more than 80 countries. The share of top 10 import partners within total imports realized as % 71 on unit base and % 75 on value base in the 9 months of 2015.

5 major import partners in the 9 months of 2015 are Germany, China, S. Korea, Italy and France.

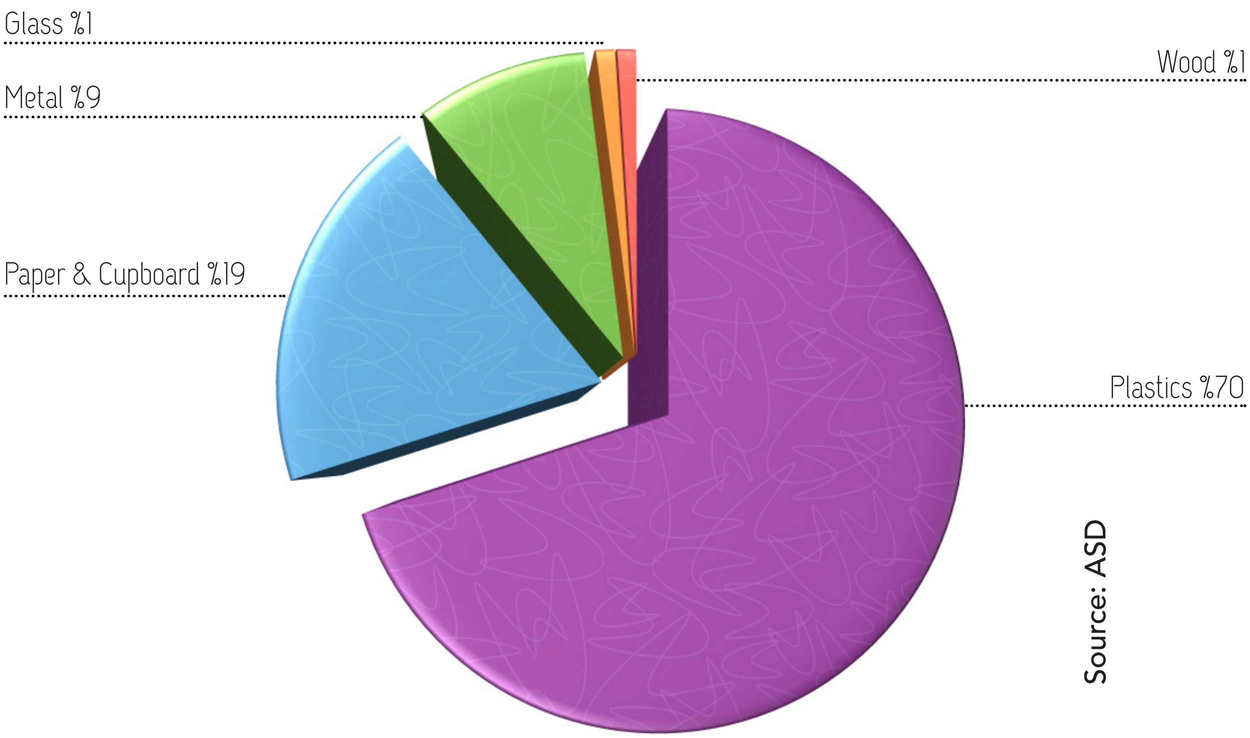
2014					2015/9				
			% Share					% Share	
Countries	100 Tons	Million $	1000 Tons	Million $	Countries	1000 Tons	Million $	100 Tons	Million $
Germany	69	383	16.6	20.5	Germany	52	244	16	19
China	102	321	24.3	17.2	China	78	235	25	18
S.Korea	30	172	7.2	9.2	S.Korea	27	105	8	9
Italy	34	160	8.1	8.6	Italy	22	111	7	8
France	15	87	3.6	4.7	France	11	55	4	4
UK	9	76	2.1	4.1	USA	6	50	2	4
Belgium	11	64	2.6	3.5	UK	5	51	2	4
USA	7	63	1.7	3.4	Belgium	9	46	3	4
Greece	11	39	2.7	2.1	Greece	8	27	3	2
İndia	10	35	2.4	1.9	Netherland	5	24	2	2
Total 10 Countries	299	1.400	71.3	75.0	Total 10 Countries	224	949	71	75
Others	120	466	28.7	25.0	Others	93	324	29	25
Total	**419**	**1.866**	**100.0**	**100.0**	**Total**	**317**	**1.273**	**100.0**	**100.0**

Sheet 7: 10 Major Import Partners For Plastics Packaging Materials

Source: TUIK

PLASTICS PACKAGING MATERIALS EXPORTS

According to the ASD - Packaging Manufacturers Association records, The share of total exports of plastics packaging industry is 70 % in total packaging imports.

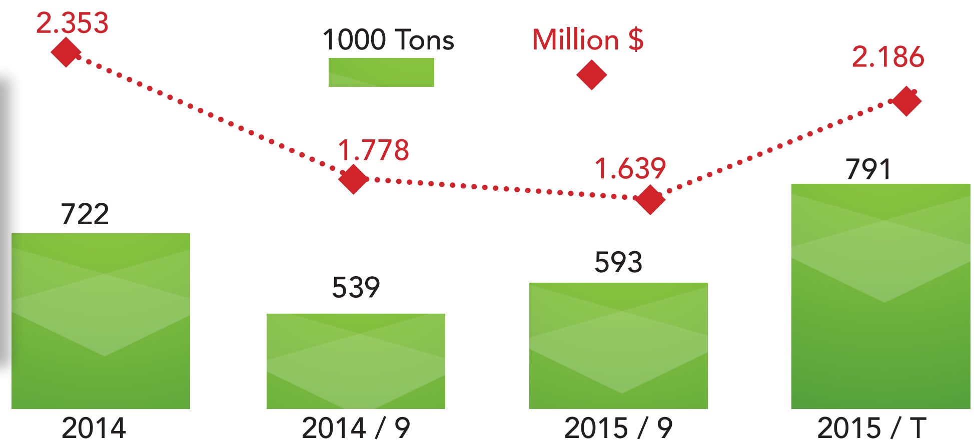


Form 6: Total Packing Materials Exports By Materials

Plastic packaging products exports in the 9 months of 2015 has amounted to 593 thousand tons and USD billion of 1.6 increasing by % 10 on unit base and decreasing by % 8 on value base, compared to peers period of 2014.

PLASTICS PACKAGING MATERIALS EXPORTS

Form 7: Plastics Packaging Materials Export



In the 9 months of 2015, compared to peers period of 2014, the exports of all plastics materials other than described in 3919 HS number, increased by between % 6 - % 16 on unit base and decreased by between % 3 - % 25 on value base.

At the end of 2015, exports of plastics packaging materials are estimated to be 791 thousand tons ve USD billion of 2,2 increasing by % 10 on unit base and decreasing by % 7 on value base compared with 2014.

Sheet 8: Plastics Packaging Materials Export (1000 Tons)

HS NO	2014	2014/9	2015/9	2015-T	İNCREASE % 2015/2014 (9)	İNCREASE % 2015/2014
3919	21	15	14	19	-9.1	-10.3
3920	302	228	246	328	7.5	8.4
3921	121	87	93	123	5.9	2.2
3923	278	208	241	321	16.1	15.4
Total	722	539	593	791	10.1	9.5

Source: TUIK

Sheet 9: Plastics Packaging Materials Export (Million $)

HS NO	2014	2014/9	2015/6	2015-T	İNCREASE % 2015/2014 (6)	İNCREASE % 2015/2014
3919	148	114	85	114	-25.3	-23.4
3920	968	739	674	899	-8.8	-7.1
3921	420	309	280	374	-9.3	-11.1
3923	816	615	600	799	-2.6	-2.1
Total	2.353	1.778	1.639	2.186	-7.8	-7.1

Source: TUIK

The share of plastics packaging products in total plastics exports which was 45 % on unit base and % 47 on value base in 2014 increased to % 51 in on unit and value bases in the 9 months of 2015.

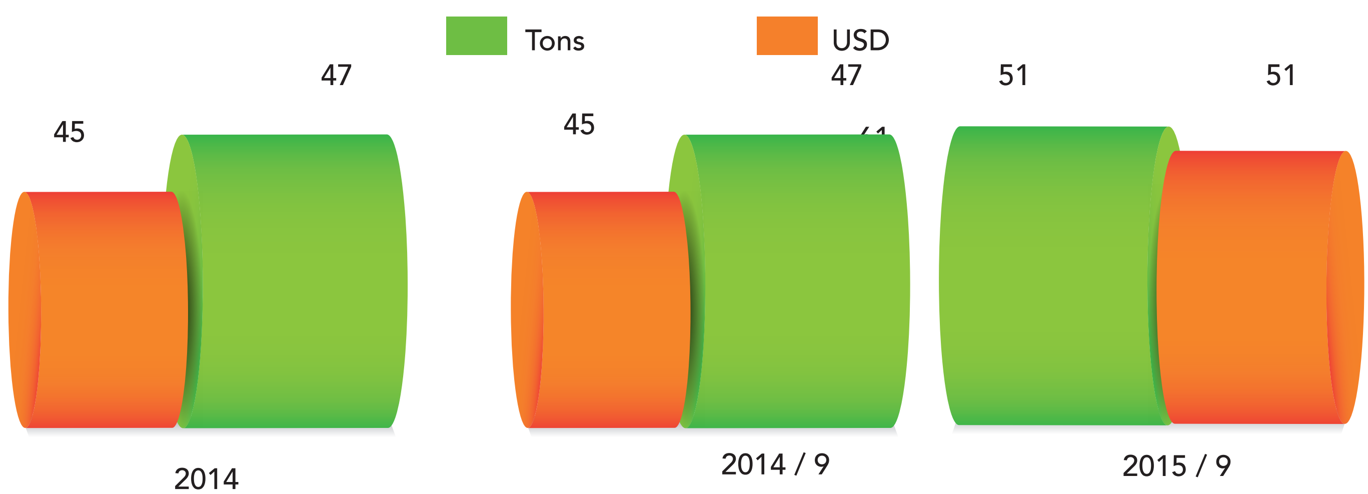
PLASTICS PACKAGING MATERIALS EXPORT

HS CODE	DESCRIPTION	1000 TONS	MİLYON $	% - TONS	% - $
392321000019	Sacks and bags used in other places (including cones); which are polymers of ethylene	61	168	10.3	10.2
392020210019	The propylene polymer of the sheet, plate, film, foil and strip; thick <= 0, 10 mm boryent	60	140	10.1	8.6
392330100019	Other bottles, flasks, etc; volume = <2 liters	72	118	12.1	7.2
392310000000	Plastic boxes, cases, crates and so on.	42	108	7.0	6,6
392020210011	The propylene polymer of the sheet, plate, film, foil and strip; bold <= 0, 10 mm boryent printed	17	85	2.9	5.2
392010230000	Plastic film and so on; Polyethylene, specific gravity <0, 94, bold <0, 125mm	15	58	2.5	3,5
392010250000	Other plastic plates, sheets, etc; Polyethylene, specific gravity <0.94, thick <0, 125mm	15	56	2.6	3.4
392329900019	Sacks and bags (including cones) of other plastics	16	55	2.7	3.3
392350900000	Stoppers and other closures materials	15	54	2.5	3.3
392190600019	Other joining plates of the polymerization products, sheets, film, etc. (non-porous)	10	45	1.6	2.7
	Total 10 Products	322	887	54.4	54.1
	Others	271	753	45.6	45.9
	TOTAL	593	1.639	100.0	100.0

Source: TUIK

Sheet10: The 10 Main Products in Total Plastics Packaging Materials Exports (2015 / 9)

The share of plastics packaging products in total plastics exports which was 45 % on unit base and % 47 on value base in 2014 increased to % 51 in on unit and value bases in the 9 months of 2015.



Form 8: Plastics Materials Exports in Total Plastics Exports (%)

Turkey exports plastic packaging products to more than 150 countries, and 10 major export partners had 48 % share on unit and value base in the 9 months of 2015. In this period, Iraq, UK, Germany, France, and Italy kept its status of top 5 markets, to which Turkey exported plastic packaging products.

2014					2015/9				
Countries	1000 Tons	Million $	%Share Value	% Share Value	Countries	1000 Tons	Million $	%Share Value	% Share Value
UK	59	177	8.1	7.5	Iraq	66	131	11	8
Germany	47	167	6.5	7.1	UK	46	125	8	8
Iraq	67	159	9.3	6.7	Germany	42	125	7	8
France	28	111	3.9	4.7	France	22	77	4	5
İran	19	97	2.7	4.1	Italy	25	68	4	4
Italy	32	96	4.4	4.1	İsreal	24	58	4	4
Netherland	21	86	2.9	3.7	Netherland	16	55	3	3
Azerbeijan	24	80	3.3	3.4	İran	12	54	2	3
Rusya	17	73	2.4	3.1	Azerbeijan	15	44	3	3
Israil	26	70	3.6	3.0	Romania	15	43	3	3
Total 10 Countries	339	1.115	47.0	47.4	Total 10 Countries	283	780	48	48
Others	383	1.238	53.0	52.6	Others	310	859	52	52
Total	**722**	**2.353**	**100.0**	**100.0**	**Total**	**597**	**1.639**	**100.0**	**100.0**

Sheet 11: 10 Major Export Partners

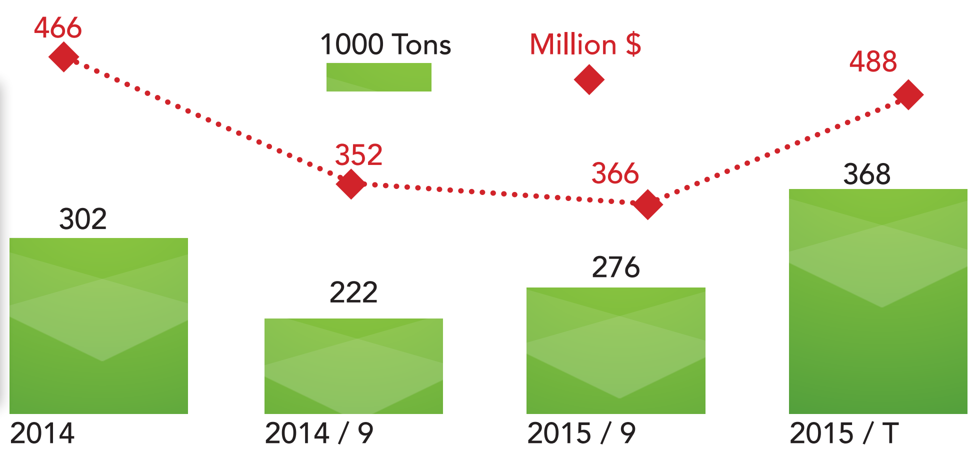
Source: TUIK

BALANCE OF TRADE IN PLASTIC PRODUCTS

Turkey has foreign trade surplus in terms of unit and value in total foreign trade of plastic packaging products. Having been 276 thousand tons and USD million of 366 in the 9 months of 2015, the foreign trade surplus of plastic packaging products increased by 24 % on unit base and % 4 on value base compared to the peers period of 2014.

Foreign trade surplus is expected to be 368 thousand tons and USD million of 488 at the end of 2015 increasing by % 22 on unit base and % 5 on value base compared to 2014.

Form 9: Plastics Packaging Materials Foreign Trade surplus



FOREIGN TRADE BALANCE IN PLASTIC PACKAGING PRODUCTS

Sheet 12: Foreign Trade Equilibrium in Plastics Packaging Industry (1000 Tons)

HS NO	2014	2014/9	2015/9	2015-T	İNCREASE % 2015/2014 (9)	İNCREASE % 2015/2014
3919	-35	-26	-28	-38	8	10
3920	50	37	54	72	46	43
3921	54	39	44	58	13	8
3923	233	173	207	276	19	18
Total	302	222	276	368	24	22

Source: TUIK

Sheet 13: Foreign Trade Equilibrium in Plastics Packaging Industry (Million $)

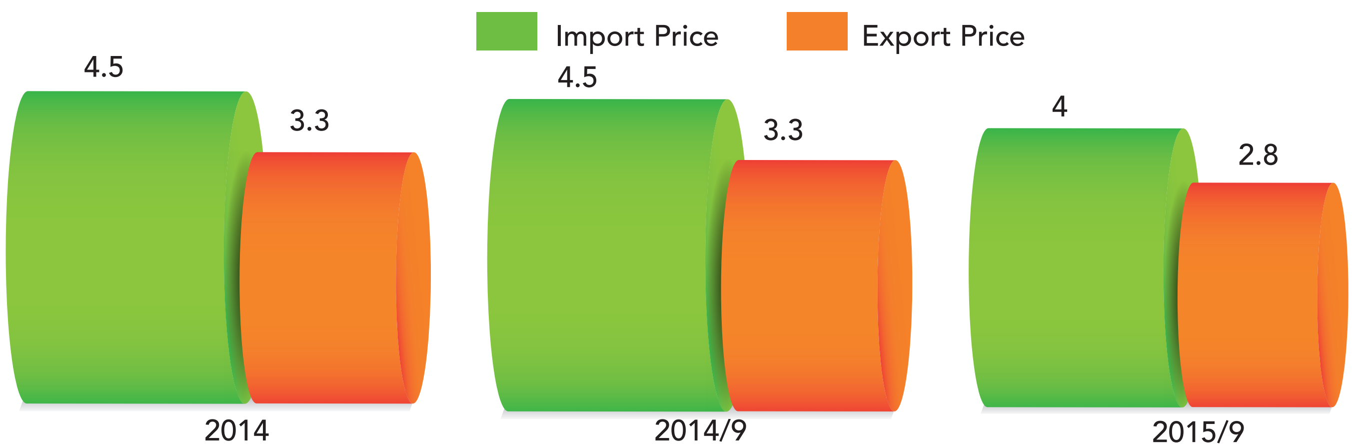
HS NO	2014	2014/9	2015/9	2015-T	İNCREASE % 2015/2014 (9)	İNCREASE % 2015/2014
3919	-190	-144	-151	-201	5	5
3920	-36	-35	-14	-19	-59	-47
3921	123	104	92	123	-11	0
3923	570	427	438	585	3	2
Total	466	352	366	488	4	5

Source: TUIK

FOREIGN TRADE PRICES IN PLASTIC PACKAGING PRODUCTS

Average import prices of plastic packaging products have been over the average export prices in Turkey since 2000. This shows that Turkey imports plastic packaging products with higher added-value while exporting products with lower added-value.

Average import unit price realized as 4,0 USD / Kg and average export unit price 2,8 USD / Kg for plastic packaging goods in the 9 months of 2015. The import prices declined by 11 % and export price decreased by 16 % compared to the peers period of 2014.



Form 10: Unit Foreign Trade Prices of Packing Materials($/Tons)

It is seen that, the unit import and export prices of all plastics pakaging materials declined in the 9 months of 2015.

FOREIGN TRADE PRICES IN PLASTIC PACKAGING PRODUCTS

Sheet 14: Unit Foreign Trade Prices in Turkish Plastics Packaging Materials ($/Kg)

HS NO	UNIT IMPORT PRICES			UNIT EXPORT PRICES		
	2014/9	2015/9	İNCREASE %	2014/9	2015/9	İNCREASE %
3919	6.2	5.5	-10	7.40	6.08	-18
3920	4.0	3.6	-11	3.23	2.74	-15
3921	4.2	3.8	-9	3.54	3.03	-14
3923	5.5	4.7	-14	2.96	2.49	-16
Avarage	4.5	4.0	-11	3.3	2.76	-16

Source: TUIK

SUPPLY AND DEMAND EQUILIBRIUM FOR 2015

Turkey, shows a faster development than the EU Countries the economies of which are more developed and relatively sophisticated packaging markets have reached saturation pints.

Growing urbanization trend, the lengthening of the average life expectancy, women's increasing population of working life, the contribution of consumption habits and the expectations of consumers ; developed the self-service in the central and consumer direct selling hypermarket, promotes the spread of supermarkets and supermarket chains in the entire country.

This support the development of use of retail systems packaging. Likewise, consumers in markets achieve the possibility of finding with many more varieties of cheap but good quality and reliable products, price and quality.

	2014	2014/9	2015/9	2015 /T	% İNCREASE 2015/2014 (9)	% İNCREASE 2015/2014 (T)
PRODUCTION	3.321	2.533	2.512	3.350	-0.8	0.9
IMPORT	420	317	317	423	0.2	0.8
EXPORT	722	539	593	791	10.1	9.5
DOMESTİC CONSUMPTION	3.019	2.310	2.236	2.982	-3.2	-1.2
FOREIGN TRADE DEFICIT / SURPLUS	302	222	276	368		
EXPORT / PRODUCTION (%)	22	21	24	22		
IMPORT / DOMESTIC CONSUMPTION (%)	14	14	14	14		
EXPORT / IMPORT (%)	172	170	187	187		

Sheet 15: General Supply and Demand Equilibrium in Plastics Packaging Materials Industry
(1000 Tons)

SUPPLY AND DEMAND EQUILIBRIUM FOR 2015

Apart from customer service, sale promotions, special discounts, free product coupons directs customers preferably to purchase from the store.

To sum up ; the chain of shopping malls and retail sales racks and feed the order accordingly packaged product demand.
In the first six months of 2015 compared to peers period of 2014, regarding with the the plastic packaging products in unit base ;
Production by 5.8%, imports by % 5,8 exports by % 10,2 and trade surplus by % 16,3 increased but domestic consumption remained at the same level.
22% of the total production was exported while % 14 of domestic consumption was met by imports. Import – export covarage ratio realised as % 187

	2014	2014/9	2015/9	2015 /T	% INCREASE 2015/2014 (9)	% INCREASE 2015/2014 (T)
PRODUCTION	12.867	9.877	8.510	11.347	-13.8	-11.8
IMPORT	1.886	1.426	1.273	1.698	-10.7	-10.0
EXPORT	2.353	1.778	1.639	2.186	-7.8	-7.1
DOMESTIC CONSUMPTION	12.400	9.525	8.144	10.859	-14.5	-12.4
FOREIGN TRADE DEFICIT / SURPLUS	466	352	366	488		
EXPORT / PRODUCTION (%)	18	18	19	19		
IMPORT / DOMESTIC CONSUMPTION (%)	15	15	16	16		
EXPORT / IMPORT (%)	125	125	129	129		

Sheet 16: General Supply and Demand Equilibrium in Plastics Packaging Materials Industry
(USD Million)

PLASTIC PACKAGING END OF YEAR 2015 EXPECTATIONS

At the end of 2015; It is expected that production of plastics packaging materials to increase % 0,9 imports by % 0,8 exports by % 9,5 while domestic consumption decline by % 1,2 on unit base compared to 2014.

On the other hand, in value base; It is expected that, the production to decline by % 11,8 imports by % 10 exports by % 7,1 and domestic consumption by % 12,4.

In the coming years, increased globalization in the world plastic packaging industry ; will result for especially small and medium-sized plastic processors in particular, the merger of the companies and even go to more and more cooperation. It will also create opportunities for the companies that develope new products and manufacture them will offer more added value. The raw materials and machinery suppliers enters into closer global cooperation in the plastic packaging industry.

The plastics packaging industry comes increasingly into a service industry with international services, timely delivery and e-commerce. Outsourcing for customers and full service packages is being more important in the plastics packaging industry.

Export of plastic packaging products in 2023 is expected to reach USD billion of 5.5 In order to achieve this goal; target markets and of products to be exported to these market (traditional and larger value-added) must be identified, conducting market researches for these products, the presentations of the selected product in the target markets, making B2B meetings, delegation visits and active participation in fairs to be obtained as the main actions.

In 2023, in order to achieve the export target of $ 5.5 billion; The creation of strategic alliances should be discussed as another strategy. To this end ; Exporting or less exporting companies to be gathered, establishment of plastic packaging industrial foreign trade company, to cut costs with joint purchasing and secure raw materials and additives to ensure supply, creating partner portals, establishing technical and commercial infrastructure, develop and expand the cluster activities to ensure increased efficiency in production and create a synergy actions in major plastic specialized organized industrial zones.

Another strategy is: to become a global center of excellence in producing innovative products in Turkey. The main actions that can be done for this purpose are; to produce technological products, to set priorities on R & D investments, create development policies, take best practices of the leading Countries and organizations in the packaging industry as a model, develop mechanisms to encourage mergers to increase the international competitiveness, to identify the R & D needs of the plastic packaging industry to establish scientific works in universities to increase innovative activities.