

Turkish Packaging Industry 2022 Summary Report

(including 2021 data)

ASD Turkish Packaging Manufacturers Association has announced the Turkish Packaging Industry Report, which it regularly shares with its members every year. According to the report, while the industry's success chart continued over the last year, the packaging industry, one of the few industries in Turkey that didn't have a foreign trade deficit maintained its successful course with its value-added and sustainable production model. Growing about 3 percent worldwide, the packaging industry grew by an average of 7 percent in volume and 9 percent in turnover in Turkey between 2017 and 2021.

ASD Turkish Packaging Manufacturers Association published a report that comparatively reveals the situation and the volumes of the market around the world and in Turkey, analyzes import and export figures and compiles general sectoral information. According to the report, as the manufacturing industry acquires new production plants, Turkish packaging industry is developing faster than that of EU countries which have developed packaging markets to meet new demands. The United States, the world's largest packaging consumer with an industry of \$140 billion was followed by China with a demand of \$100 billion, according to the report, which estimates that the global packaging industry, with an average growth of 3% per year will achieve \$975 billion turnover in 2018. China, achieving rapid growth in the industry is expected to surpass the United States in the near future.

With a size of USD 28 billion, Turkey ranks the 6th in Europe and ranks the 16th worldwide. Countries whose industry turnover is close to it were announced to be those which have population advantage, namely India, Brazil and the Russian Federation.

The Turkish Packaging Industry is \$28 Billion

The report has some striking highlights about Turkey. According to the report, Turkish packaging industry, which managed to withstand the global financial crisis between 2008 and 2009 made it through 2008 without regression and 2009 with a tiny shrinkage, whereupon it went through a swift recovery process starting from 2010 and closed the year with 18% increase in production. Its trend of growth continued over the following years.

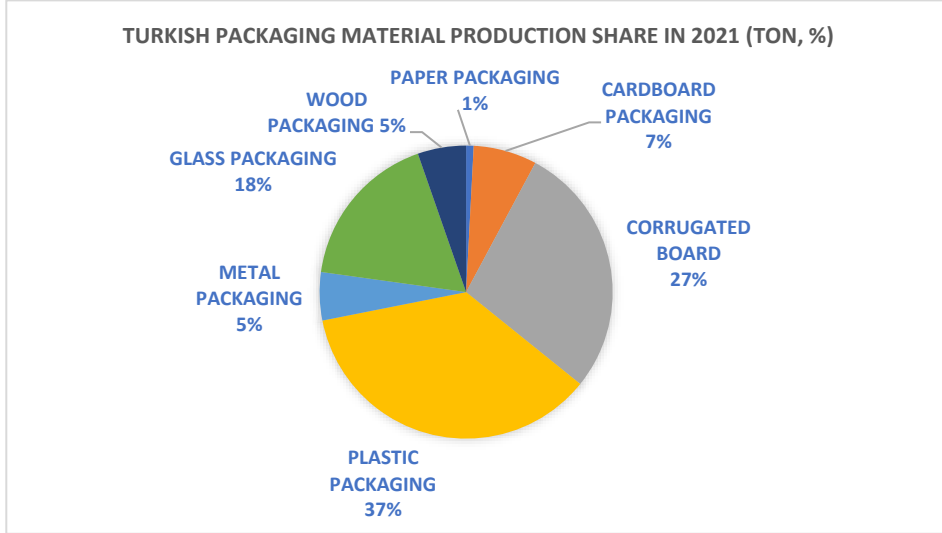
The size of the packaging industry in 2017 was calculated as 9 million tons in terms of production volume and 20 billion dollars in terms of total turnover; for 2018, in terms of production volume, it was 9 million tons and 22 billion dollars; for 2019, it was 9.4 million tons and 23 billion dollars and for 2020, it was 10.3 million tons and 25 billion dollars. In 2021, the Turkish Packaging Industry production was realized as 11.2 million tons. The turnover of the industry was announced as approximately \$28 billion in 2020.

As revealed by the examination of production data for 2021 according to material groups in the report, plastic packaging ranked the top with 37%, followed by corrugated board with 27%, glass packaging with 18%, cardboard packaging with 7%, wood packaging with 5%, metal packaging with 5% and paper packaging with 1%.

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With noticeable figures in foreign trade, the packaging industry increased in volume by 4% and in value by 26% in 2021 and achieved 6.5-billion-dollar valued packaging exports compared to the previous year. The packaging industry increased its packaging export from 1.5 million tons in the first half of 2021 to 1.7 million tons in the first half of 2022 with an increase of 11.4% and reached 3 billion 810 million dollars in value with an increase of 25.2%. The report emphasized that the size of Turkish packaging industry is expected to reach \$30 billion by the end of 2022 and stated that this figure will enable a \$490 billion economy.



The Size of Global Packaging Industry is \$975 Billion

According to data in the report with regard to global packaging industry, the world packaging industry will achieve \$975 billion turnover in 2018 (Source: Pira International). With the contribution of the economies of developing regions in particular, annual average growth was projected to be around 3%. While this growth was mostly observed in the paper, cardboard, corrugated cardboard and hard (rigid) plastic packaging industries, it was possible to achieve \$301 billion and \$248 billion size respectively in these sub-industries in 2018. The report also anticipated that in the global packaging industry in 2018, the sum of hard (rigid) and flexible plastic packaging would rank at the top with 45%, followed by paper, cardboard, corrugated board group with 31% and that the share of the metal packaging industry and glass packaging industry would be 13% and 7%, respectively.

Industry Export Figure is \$6.5 Billion

Packaging industry export was \$6.5 billion according to 2021 data published by the Turkish Statistical Institute (TUİK). The industry aims to close 2022 with \$7.5 - 8 billion export.

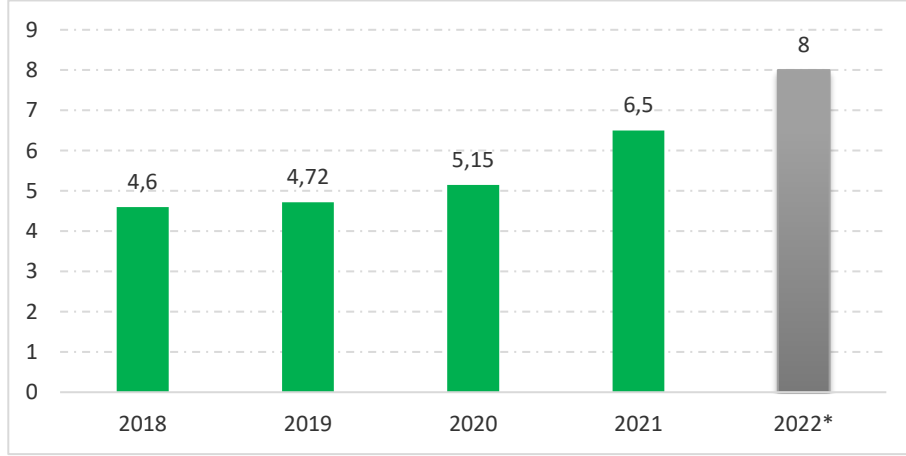
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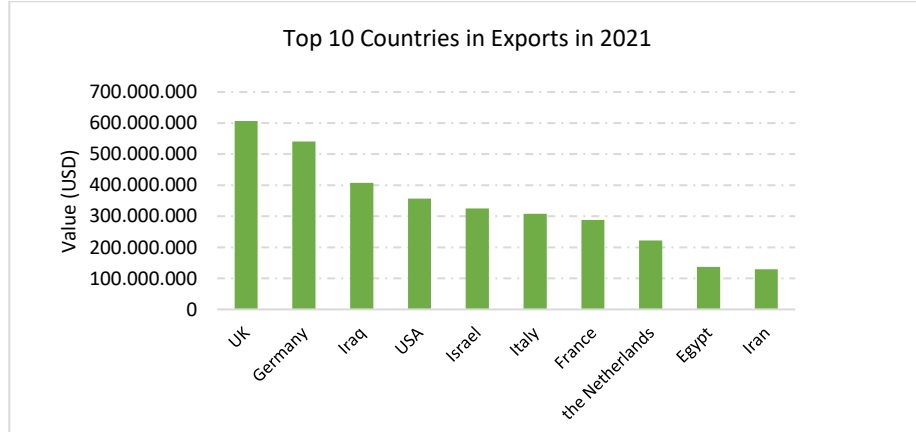


Turkish Packaging Industry Export According to Years (Billion \$)



*Expected

Packaging Industry export increased by 4% in volume and 26% in value compared to the previous year. From a regional point of view, the surrounding regions such as the EU market, the Middle East, North Africa, the Caucasus and the Balkans were the markets where Turkey had strong presence. Turkish Packaging Industry products were exported to 180 countries, in particular the EU countries. In 2021, the UK, Germany, Iraq, the United States, Israel, Italy, France, the Netherlands, Egypt and Iran were among the top 10 countries in exports. Plastic packaging products ranked at the top with 66% export share in packaging industry exports in 2020. Another important exported packaging group was paper, cardboard, corrugated board packaging products with 23% export share. Metal packaging products ranked the third in exports with 7%, followed by glass packaging with 3%.



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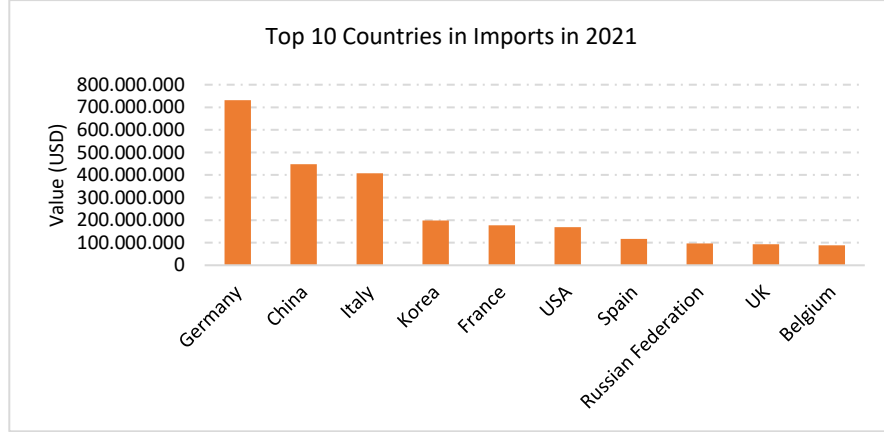
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Industry Import Figure is \$3.8 Billion

Turkish Packaging Industry import was approximately \$3.8 billion according to 2021 data published by the Turkish Statistical Institute (TÜİK). Imports shrank by 7% in volume and 22% in value compared to 2020.

In 2021, Germany, China, Italy, South Korea, France, the United States, Spain, Russian Federation UK and Belgium were among the top 10 countries in import.



Plastic packaging (54% of packaging import) and paper, cardboard, corrugated board packaging (37% of packaging import) were the major import items. Most of these products were imported raw materials or semi-finished products since cellulose is not produced in Turkey and almost all of the raw material for industrial packages made of corrugated cardboard had to be imported.

Packaging Consumption Per Person is \$325

Packaging consumption per capita was also noted in the report. According to United Nations (UN) data, upon calculation of the world population that reached 7.9 billion in 2021, average per capita packaging consumption was \$118. This figure was \$440 in North America and Canada while it was \$365 in Western Europe. The country with the highest figure is Japan with \$516.

It was calculated that per capita packaging consumption in Turkey in 2021 was \$325.4. The report revealed that packaging consumption per capita increased by \$30 compared to the previous year. In 2021, annual consumption of plastic packaging per capita ranked at the top with \$187, followed by corrugated board with \$64.6, metal packaging with \$26.2, glass packaging with \$24, cardboard packaging with \$16, wood packaging with \$6 and paper packaging with \$2 dollars.

2023 and 2030 Goals

The report also included the industry's goals for 2023 that the Turkish Republic will celebrate the 100th anniversary. It was stated the goal for 2023 was to increase the turnover of Turkish packaging industry from \$28 billion to \$30 billion, per capita consumption from \$325 to \$380; export from \$7.5 billion to \$10 billion and for 2030 the turnover would be \$50 billion and exports would be \$20 billion.

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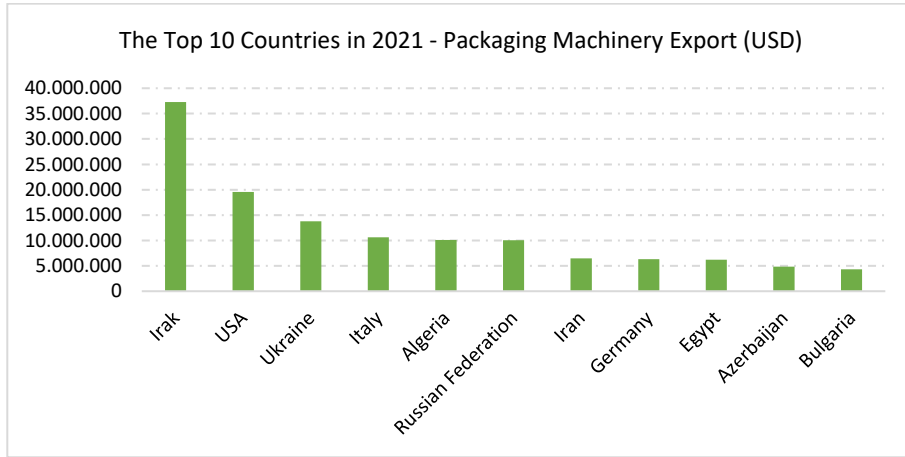


65 Companies Were Among the ISO 1000

The report also included the İstanbul Chamber of Industry ISO 1000 data showing the size of the industry. Among First 500 + Second 500 Largest Industrial Companies (ISO 1000 Companies) announced by ISO in Turkey, there were 65 packaging companies in 2021, 42 of which were members of the ASD Turkish Packaging Manufacturers Association. Considering the annual change in the packaging industry; it was observed that the number of companies that appeared in ISO 1000 increased from 62 to 65, sales from the production made by these 65 companies increased by approximately 43.77% and their export increased by 32.79%.

Turkish Packaging Machinery Export is 252 Million \$

Another important item in the report was the packaging machinery industry. \$209 million in 2020, the packaging machinery export reached \$252 million in 2021. Iraq, the United States, Ukraine, Italy, Algeria, Russian Federation, Iran, Germany, Egypt, Azerbaijan and Bulgaria, and were among the top 11 countries in export in 2020.

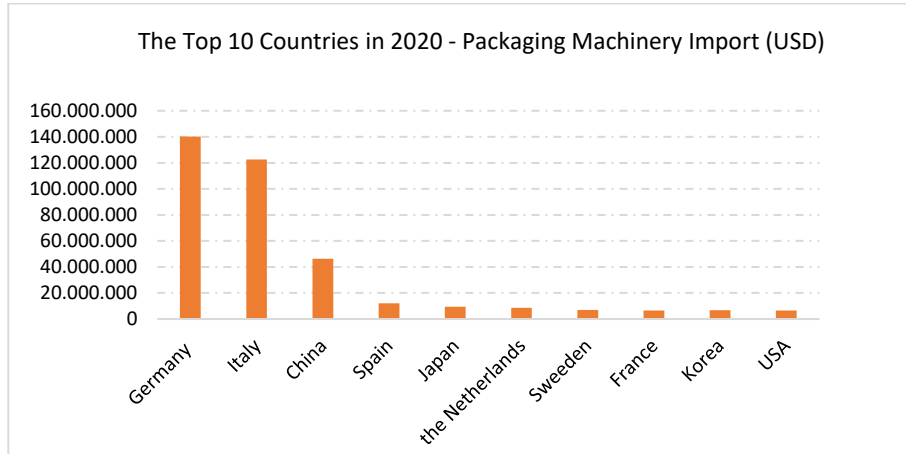


Turkish Packaging Machinery Import is 399 Million \$

\$425 million in 2020, packaging machinery import shrank to \$399 million last year. Germany, Italy, China, Spain, Japan, the Netherlands, Sweeden, France, South Korea and the United States were among the top 10 countries in import in 2021.

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Please contact asd@ambalaj.org.tr for your opinions and remarks about the report. The data in this report cannot be published without referring to the source.

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