



AUSTRALIAN INSTITUTE
OF PACKAGING
55 YEARS: 1963-2018



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



Aslihan Arikan, General Secretary
ASD – Turkish Packaging Manufacturers Association
VP Education of WPO – World Packaging Organisation
1st VP of APF – Asian Packaging Federation



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

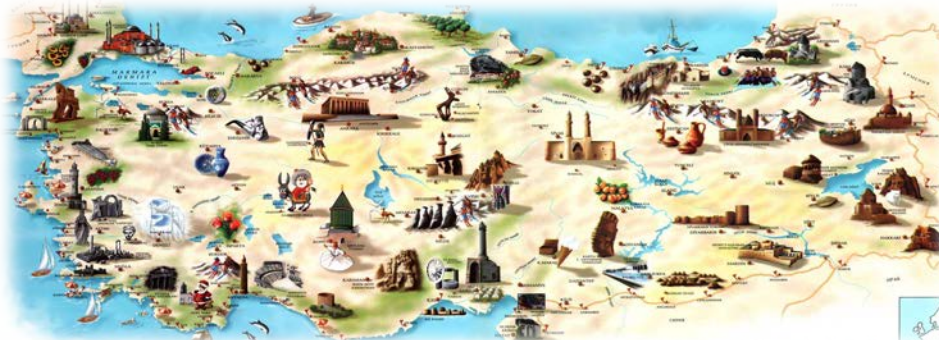




Turkish Packaging Industry

Turkey in a nutshell

- Turkey is a **Eurasian** country stretching across the **Anatolian** peninsula in Western Asia and Thrace in the Balkan region of South Eastern Europe.
- Anatolia and Thrace are separated by the Sea of Marmara, the **Bosporus** and the **Dardanelles** which are deemed to outline the border between Asia and Europe thus making Turkey transcontinental.



Turkey in a nutshell

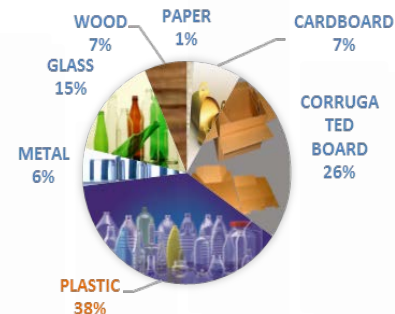
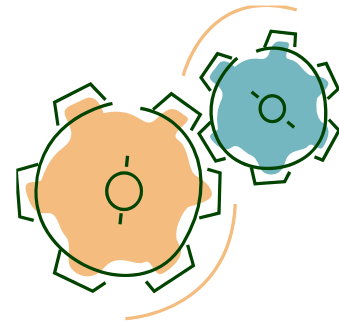
- A powerful regional presence in the **Eurasian** landmass with strong historic, cultural and economic influence in the area between **Europe** in the west and **Central Asia** in the east; **Russia** in the north and **the Middle East** in the south, Turkey has come to acquire increasing strategic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



- **80 million population increasing 1,5%** every year.
 - Number of cities populated over 1 million = **20**
 - 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 59 Capital cities of the World from Istanbul
 - The highest GDP growth in the World in 2017, 7%
- 17th biggest economy**, total GDP 858 billion \$ in 2016 (by IMF)
- Total exports in 2016 : 143 billion \$
 - Total imports in 2016 : 198 billion \$

Turkish Packaging Volume (tons/year)

PACKAGING TYPE	2012	2013	2014	2015	2016
PAPER	110,000	88,000	101,000	85,000	80,000
CARDBOARD	534,250	568,000	460,000	577,000	615,000
CORRUGATED	1,772,000	1,879,000	1,970,000	2,031,000	2,022,000
PLASTIC	2,160,000	2,519,000	2,800,000	2,988,000	3,293,000
METAL	375,250	385,000	393,000	428,000	433,000
GLASS	951,000	978,000	1,080,000	1,153,000	1,232,000
WOOD	469,500	484,000	498,000	510,000	526,000
TOTAL (ton)	6,372,000	6,901,000	7,302,000	7,772,000	8,201,000



Turkish Packaging Volume (tons/year)

- Turkish Packaging Production is 20 billion \$
- Volume is > 8,5 million tons / in year 2017
- The Annual Growth is 10 – 15% (usually double the economic growth in the country)
- Packaging Consumption Per Capita in 2016 is 220 USD. Please remember that Estimated World avg. is 110 USD



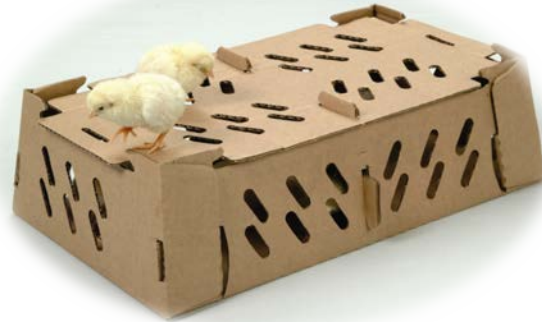


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**USD 20 Billion
Packaging Production enables**

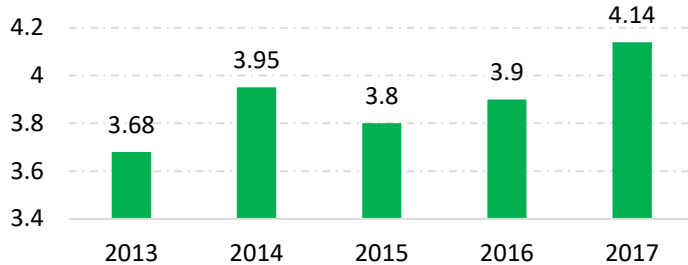


**Economy of min. USD 350 – 370
billion in the country**



Turkish Packaging Exports

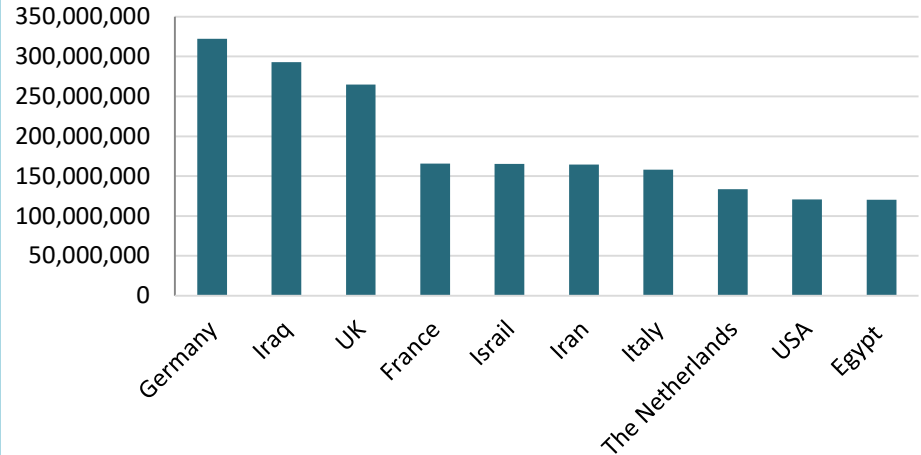
Packaging Exports (USD billion)



- Turkish Packaging Export reached USD 4 billion & 2.1 million tons / in 2017;
- 20% of packaging production exported
- 60% is plastic packaging

- The top 10 countries that we sell packaging

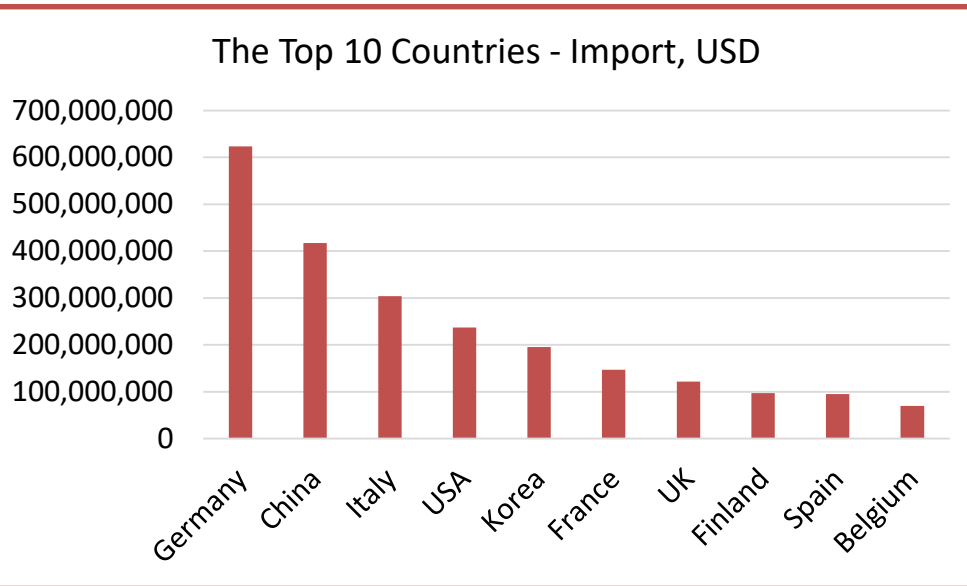
Top 10 countries in 2017 – Exports, USD



Turkish Packaging Imports

- A major part of the Packaging imports is raw material or semi-product imports mostly paper.
- Turkish Packaging Import decreased to USD 3.4 billion & 1.8 million tons / in 2017;
- **Foreign trade surplus: USD 790 million in Turkey.**

- The top 10 countries that we buy from:



World Packaging Industry (USD)

- **Global Packaging Industry:**
USD 975 billion in 2018 (estimated)
- **Eurasia : Europe + Asia + Middle East :**
USD 675 billion
 - China is the biggest consumer in the region
 - Emerging countries : India, Indonesia and Turkey in Eurasia.
- **Turkish Packaging industry is**
 - 6th in Europe,
 - 16th in the World
 - 6th in Eurasia region.





Trends & Sustainability

Packaging Legislation in Turkey

The key drivers affecting and directing the Turkish Packaging industry can be listed as:

- Packaging Waste Regulation (Recovery targets in 2018: 54 for cardboard, glass, metal, plastics ; 11% for wood),
 - CEN Packaging & Environment Standards
- Regulations on Manufacturing and Distribution of Food Contact Materials,
 - GMP
 - Quality Management Systems for Food Contact Materials Manufacturing
- Packaging Requirements on Transportation of Dangerous Goods & other standards.



Packaging Materials

- Barrier protection
- Convenience
- Printing quality
- Easy storage
- Environment: Prevention, Reuse, Recycling & Recovery.



3 lt stackable
PET bottles



Packaging Perception

In today's economy there is an important question to be answered:



What should we give priority for sustainable social welfare?

"More consumption for economic development" model?



Or



Conservation of resources?

a problem waiting for a solution



“A few grams of packaging material
as an important environmental
problem when considering

Several kilograms of **rotten fruit** is
ignored.”



Packaging Perception

The image of the packaging after use is preventing the perception of its most important function.

This function is to protect the product.

If the products are protected by suitable Packaging to prevent decomposition, actually, product waste will be less and so less Packaging will be used.



Products without packaging are exposed to risks





The target should be;
Better quality of life through
Better Packaging for more people.



Sustainability

- For Consumer:
 - Using reusable products
 - Savings in home heating costs
- For Company:
 - Reducing energy cost
 - Designing new products
- + Packaging manufacturer:
 - Helping consumers to understand the confusing expression, environmentally friendly packaging



Prevention

- Fewer *Raw Material* = Lower *Energy* consumption
 - Positive contribution to **Economy**
- Less *Fuel* consumption during transportation
 - Less **Greenhouse** gas emission
- Cheaper Products placing on the market
 - Positive contribution to the purchasing power of the **Consumers**



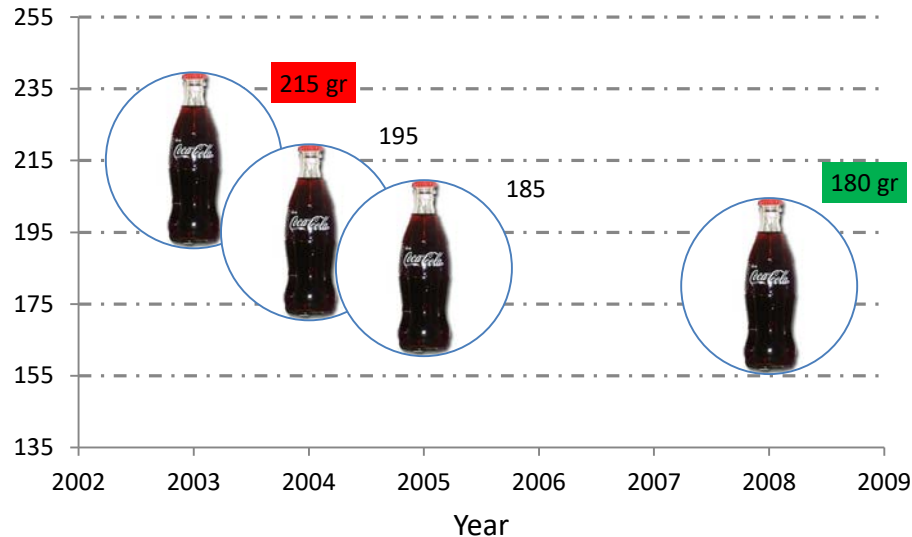
Glass

Lightweightening
Single Use C. Cola Bottles
Reference: ACS, Turkey

% 17



Weight
(grams/bottle)



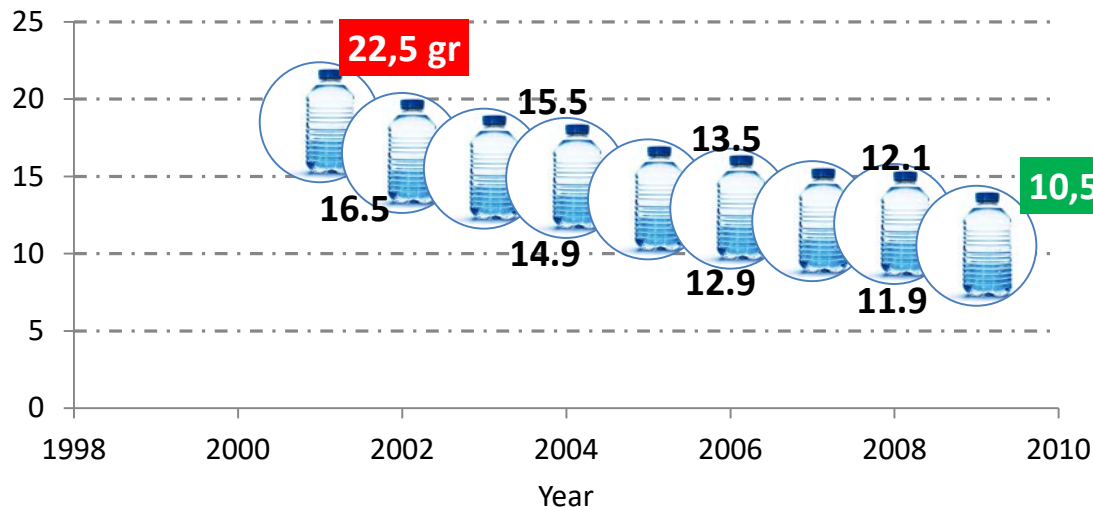
PET Bottle

Lightweightening
0,5 L PET Water Bottle
Reference: Artenius Turkpet

% 53



Weight
(grams/bottle)



**Target
< 10 gr**



7,95 gr

Aluminum

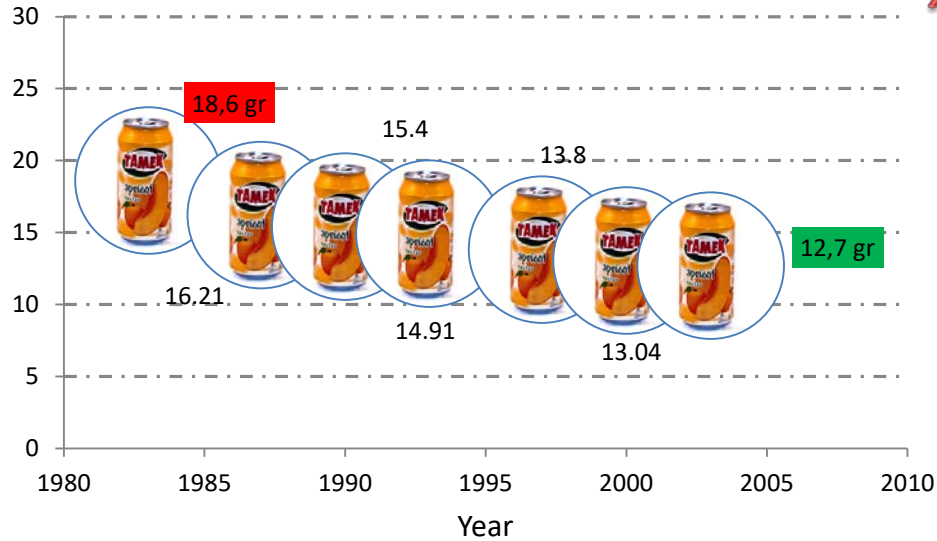
Lightweightening

330 ml Aluminum Beverage Can

Reference: Rexam

Weight
(grams/can)

% 32



Steel

Lightweightening

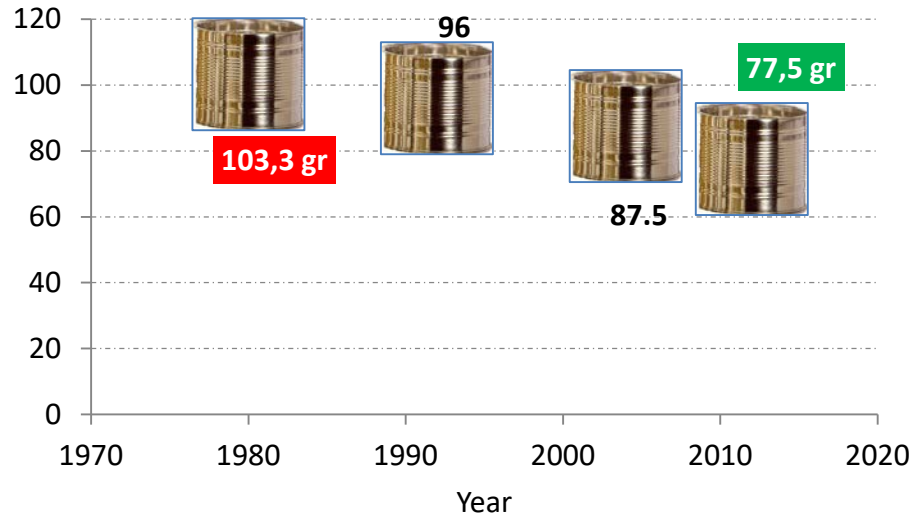
850 ml Steel Can

Reference: ArcelorMittal

% 25



Weight
(grams7can)





**Turkish Packaging Manufacturers
Association - ASD**



ASD members

> 220 companies :

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





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Eurasia Packaging Show in Istanbul



- Organized every year by ASD in cooperation with Reed Tüyp is one of our important activities.
the 24th time on 31 Oct – 3 Nov in 2018.
- 2017: 108 countries total 59.326 visitors;
43 countries, 1,153 participants in 110.000 m2



 **EURASIA
PACKAGING[®] 2018
İSTANBUL**

24th International Packaging Industry Fair

 Packaging Printing Technologies,
Corrugated - Paper - Carton
Packaging Production Technologies
Special Section

 Drink and Liquid
Food Technologies
Special Section

October 31 - November 3, 2018

 Reed | 
Reed Tüyp Turkey A.Ş.
www.reed-tuyp.com.tr

 ASD
PACKAGING ASSOCIATION
ASSOCIATION

 AMF  FISD  MASD  SEPA

International Packaging Competition

- 2016 : 11 Categories, 199 Applications, 64 Awards
- **Crescents & Stars for Packaging Competition** is accredited by **WorldStar & AsiaStar**



Student Competitions

AMBALAJ,
yaşam kalitesini yükseltmek amacıyla
üretilmiş ürünleri sürdürülebilir şekilde
SARAR, SAKLAR, SATAR...

Birincilik Ödülü:
5.000 TL

İkincilik Ödülü:
3.000 TL

Üçüncülük Ödülü:
2.000 TL

Mansiyonlar (3'er Adet):
1.000 TL

**İLK 3 PROJEYE
AYLIK ÖĞRENİM
BURSU**





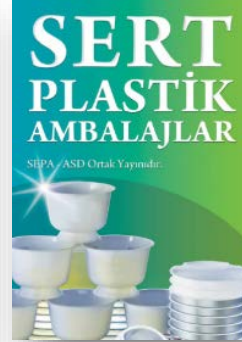

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Publications



Books



Packaging & Environment Book

The Things We Should Know About Packaging & Environment

- ✓ For Children age 10-15 (primary & junior high schools)
- ✓ 6th Edition, total 150,000 copies printed
- ✓ 130,000 copies distributed with Municipalities & Schools



Guides for Industry





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ASD Packaging Academy

2 training programs / month

Flexible Packaging

Printing Techniques

Packaging & Food Safety

Hygiene & GMP for Packaging
Manufacturers

Glass Packaging, etc..



**Ambalaj
Akademisi**

www.ambalaj.org.tr

ASD
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ANA SAYFA | BİZE ULAŞIN | ÖNERİ FORMU | ENGLISH

ARA

HAKKIMIZDA | ÜYELİK | FUARLAR | YARIŞMALAR | YAYINLAR | AMBALAJ AKADEMİSİ | BİLGİ MERKEZİ | AMBALAJ VE ÇEVRE | BASIN ODASI | ÜYE GİRİŞİ

GÜNDEM | **VIDEOLAR**

Ambalaj Ay Yıldızları 2018 Başvuruları Başladı!

Son güncelleme: 20/02/2018 TUN HABERLER

PlastPak İzmir 2018
2. PLASTİK VE AMBALAJ TEKNOLOJİSİ
MAKİNE VE MALZEMELERİ FUARI
10-14 Nisan 2018
www.plastpakizmir.com
ÜCRETSİZ DAVETİYE İÇİN TIKLAYINIZ!

ambalaj ay yıldızları 2018 ASD Ambalaj Akademisi

huber group LEADING INNOVATION

HABERLER | **DUTURULAR**

Asya Ambalaj Federasyonu Üyeleri Sri Lanka'da Bir Araya Geldi
ASD'nin Birinci Başkan Yardımcısı olduğu Asya Ambalaj Federasyonu (APF) 42. Genel Kurulu, AsiaStar Ambalaj Yığması-Juni Toplantısı ve Ödül Töreni Sri Lanka Ambalaj Enstitüsü katkısıyla 11-14 Aralık 2017 tarihlerinde Sri Lanka'nın başkenti Colombo'da gerçekleştirildi.

Üç Boyutlu Yüzeylere 360 Derece Baskı
Xerox kişiye özel baskıyı yeni bir boyuta taşıyor. Sanayiler içinde 3D yüzeylere kişiye özel baskı yapma olanakları sunuyor. Xerox'un silindirik, plastik, cam, seramik ve metal gibi üç boyutlu (3D) yüzeylere 360 derece baskı yapan Xerox Direct to Object baskı cihazı, 7,62 cm. x 50 cm. baskı alanına sahip her türlü obje üzerine saatte 30 ayrı kişiye özel 3D obje baskısı yapıyor.

Sunchemical Konsantrantları ile Sun Matbaa Malzemeleri Özel Renk Üretimine Başladı
Spot ekstra renkler baskının vazgeçilmezidir. Genellikle baskı dizaynlarında, daha geniş renk evreni elde etmek için, CMYK yerine ara renklerden oluşan ve CMYK'ya göre çok daha temiz görünüm spot renklerle tercih ediliyor. Özellikle kurumsal renkler bu şekilde seçiliyor.

AMBALAJ VE ÇEVRE

WPO WorldStar Student

GIDA AMBALAJLAMA TEKNOLOJİSİ

facebook'ta ASD

Etkinlik Takvimi

10 HAZİRAN 2018 PlastPak Plastik ve Ambalaj Teknolojisi Makine ve Malzemeleri Fuarı

1 HAZİRAN 2018 Ambalaj Ay Yıldızları 2018 Başvuruları 1 Şubat 2018 Tarihinde Başladı

TUN ETKİNLİKLER

Daily visitors more than **800** in these days,

Updated **3** times a week.



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Memberships





We are working for healthy & sustainable development of
Turkish Packaging Industry.

Thanks for your attention and patience.

Aslihan Arikan

asd@ambalaj.org.tr

www.ambalaj.org.tr



/ ambalajsanayi



ASDAmbalajSanayi