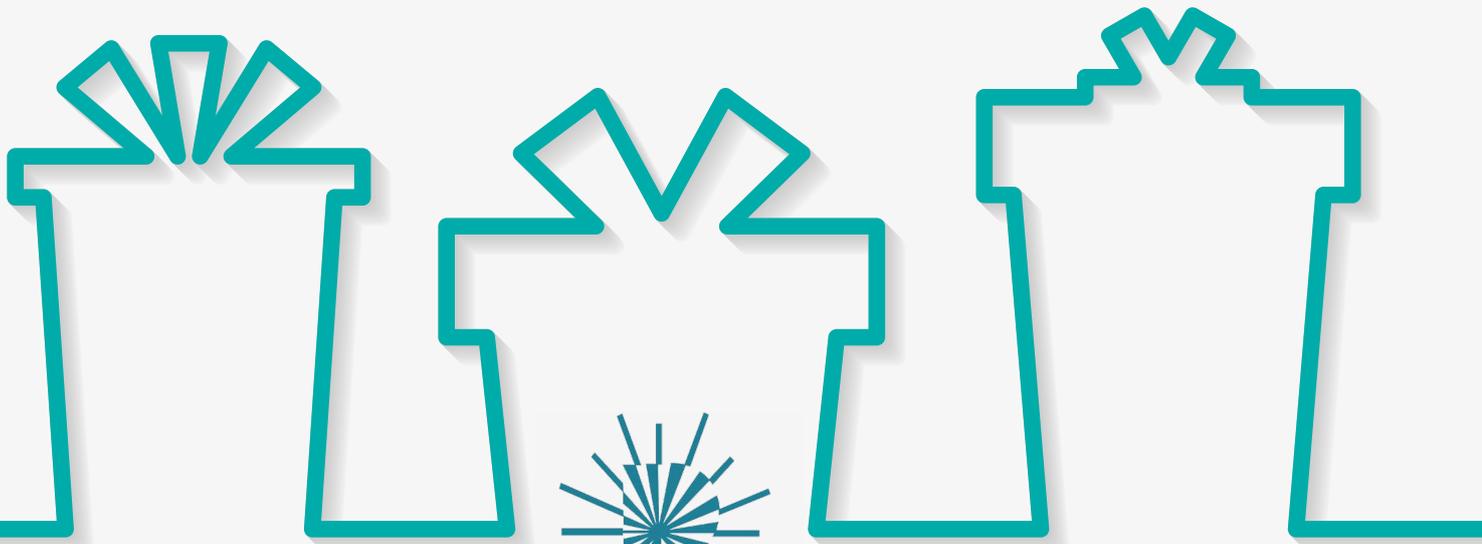


PAGEV 2016
TURKISH
PLASTICS PACKAGING MATERIALS
FOLLOW UP REPORT



1989

PAGEV®

EXECUTIVE SUMMARY

Production of plastic packaging products share between 40 – 53 % in total plastics products manufacturing of leading countries. This ratio is about 40 % in Turkey, while the world average is 46 %, respectively.

The world total plastic packaging production in 2014 amounted to 143 million tonnes and shared 46 % of total plastics production. Total world production of plastic packaging materials is estimated to be 149 million tons in 2015.

The total world foreign trade volume of plastic packaging materials reached to 76 million tons and USD billion of 332 in 2014 and the growth rate of volume realized as 3,1 % in amount base and 3,3 % on value base.

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.

In 2015 compared to 2014, regarding with the plastic packaging materials; production increased by 3,2 % in amount base and decreased by 9,7 %, imports increased by 1,4 % in amount base and decreased by 8,8 % exports increased by 12,3 % in amount base and decreased by 5,4 % in value base, domestic sales increased by 0,8 % in amount and decreased by 10,3 % in value base, trade surplus increased by 27,4 % in amount and 8,3 % in value base.

As a result; 24 % of the total production was exported in amount base while 19 % in value base, 14 % of domestic consumption was met by imports in amount and 15 % in value base and export – Import coverage ratio realised as 190 % in unit and 129 % in value base.

WORLD PLASTICS PACKAGING MATERIALS INDUSTRY

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.

1.1.

TOTAL PRODUCTION OF WORLD PLASTICS PACKAGING MATERIALS

Production of plastic packaging materials shares between 40 % and 53 % of total plastics production of the leading countries is the world share in this sector in the leading countries. The world average is 46 %



Countries	% Share	Countries	% Share
Romania	53	Iran	48
USA	53	Russian Fed.	47
Bulgaria	52	Europe	47
S. Africa	51	Middle and East Europe	46
Israel	51	India	45
Italy	50	Germany	45
Indonesia	50	Iraq	45
S. Arabia	49	Poland	45
Middle East	49	Hungary	44
Canada	49	Czech Rep.	43
France	49	China	40
W. Europe	48	Turkey	40

Source: Euromap

Table 1: Share of plastics Packaging Materials in Total Plastics Production (%)

The world total plastic packaging production in 2014 amounted to 143 million tonnes and shared 46 % of total plastics production. Total world production of plastic packaging materials is estimated to be 149 million tons in 2015

1.2

TOTAL WORLD PLASTICS PACKAGING FOREIGN TRADE VOLUME

90 % of the world's total plastic packaging production is carried out by 10 countries annual capacities of which are over 1 million tons. 39 % of total production is carried out by China and the United States.

Turkey, with 3,4 million tons of production shares 2.3 % of total world production.

	Share of Plastics Packaging in Total Plastics Production - %	Plastics Packaging Materials Production	Share in World Packaging Materials Production - %
China	40,0	32,4	21,7
USA	53,0	25,1	16,8
Germany	45,0	7,6	5,1
India	45,0	5,9	3,9
Tailand	40,0	3,9	2,6
Turkey	40,0	3,4	2,3
Italy	47,0	3,9	2,6
Brazil	50,0	3,9	2,6
France	49,0	3,7	2,5
Other Countries	48,0	59,5	39,9
Total	46,0	149,0	100,0

Source: Euromap

Table 2: Plastics Packaging Materials Production by Countries (1000 Tons)

1.2.TOTAL WORLD PLASTICS PACKAGING FOREIGN TRADE

The total world foreign trade volume of plastic packaging materials reached 76 million tons and USD billion of 332 billion in 2014 and the CAGR has been realized as 3,1 % on the basis of the amount and 3,3 % in terms of value between 2011 – 2015.



Source: ITC Trade Statistics

Figure 1: World Plastics Packaging Materials Foreign Trade Volume

1.3.

WORLD TOTAL IMPORTS OF PLASTICS PACKAGING MATERIALS

The total world imports of plastic packaging materials reached 38,7 million tons and USD billion of 156,1 in 2014 and total import is estimated to reach to 39,9 million tons and USD billion of 164,5 in 2015.



Figure 2: World Total Plastics Packaging Materials Imports

14.

WORLD TOTAL PLASTICS PACKAGING IMPORTS BY COUNTRIES

In 2014, 10 plastic packaging materials shared 72 % of total imports on amount base and 70 % share in value basis. The packaging materials in the following table CN numbers of 392010, 39290, 391990, 392321 and 392310 took place in the first 5 place among all other materials in imports.

CN	CN Description	Million Tons	USD Billion	%- Ton	%-\$
392010	Plastic film etc; polyethylene	4.7	15.1	12.0	9.7
392190	Other joining plates of polymerization products , sheets, film, etc. non-porous	3.4	14.5	8.6	9.3
391990	The adhesive sheet, plate , strip , strip , film , foil ; the others	1.9	15.1	12.0	9,7
392321	All liquids ichi bags (including cones) ; polymers of ethylenen	3.8	15.1	12.0	9,7
392310	Plastic boxes , crates , boxes and so on. Goods	3.8	15.1	12.0	9,7
392020	Other plastic plates , sheets , film , etc ; polymers of ethylene	3.0	15.1	12.0	9,7
392330	Carboys, bottles , flasks etca	2.3	15.1	12.0	9,7
392062	PET film (flexible magnetic disks should i for 72mikrometr to < thickness < 79 microMeter)72mikroMeter	1.9	15.1	12.0	9,7
392350	Caps and capsules for bottles	1.6	15.1	12.0	9,7
392390	Other materials to packaging transporting goods from plasticsr	1.9	15.1	12.0	9,7
	Total 10 Materials	28.1	15.1	12.0	9,7
	Others	10.6	15.1	12.0	9,7
	Total	38.7	156.1	100	100

Source: ITC Trade Statistics

Table 3: World Plastics Packaging Materials Imports by Products

1.5.

WORLD PLASTICS PACKAGING MATERIALS IMPORTS BY COUNTRIES

In 2014, 49 % of total world plastics packaging imports on amount base and 50 % of it in terms of value was carried out by 10 countries. USA, China, France, Germany and Mexico comprise the leading five countries in total imports.



Countries	Million Tons	%Ton	Countries	USD Billion	%-\$
Mexico	3.5	9.0	USA	14	8.9
USA	3.1	7.9	China	13.1	8.4
Germany	2.4	6.2	Germany	10.3	6.6
UK	1.9	4.8	France	7.7	5.0
France	1.8	4.7	Mexico	6.9	4.4
Netherland	1.5	3.9	UK	6.8	4.3
China	1.4	3.5	Canada	5.0	3.2
Japan	1.3	3.4	Japan	4.6	3.0
Belgium	1.0	2.7	Netherland	4.5	2.9
Canada	1.0	48.8	S. Korea	4.4	2.8
10 Countries Total	18.9	51.2	10 Countries Total	77.3	49.5
Others	19.8	51.2	Others	78,8	55.5
Turkey	0.4	1.0	Turkey	1.9	1.2

Source: ITC Trade Statistics

Table 4: Total World Plastics Packaging Materials Imports by Countries (2014)

1.6.

WORLD TOTAL PLASTICS PACKAGING MATERIALS EXPORTS

The total world exports of plastic packaging materials reached 32,8 million tons and USD billion of 126,3 in 2010 and the CAGR has been realized as 3,3 % on the basis of the amount and 5,8 % in terms of value between 2011 – 2015. Total exports are estimated to reach to 38,5 million tons and USD billion of 167,5 in 2015.

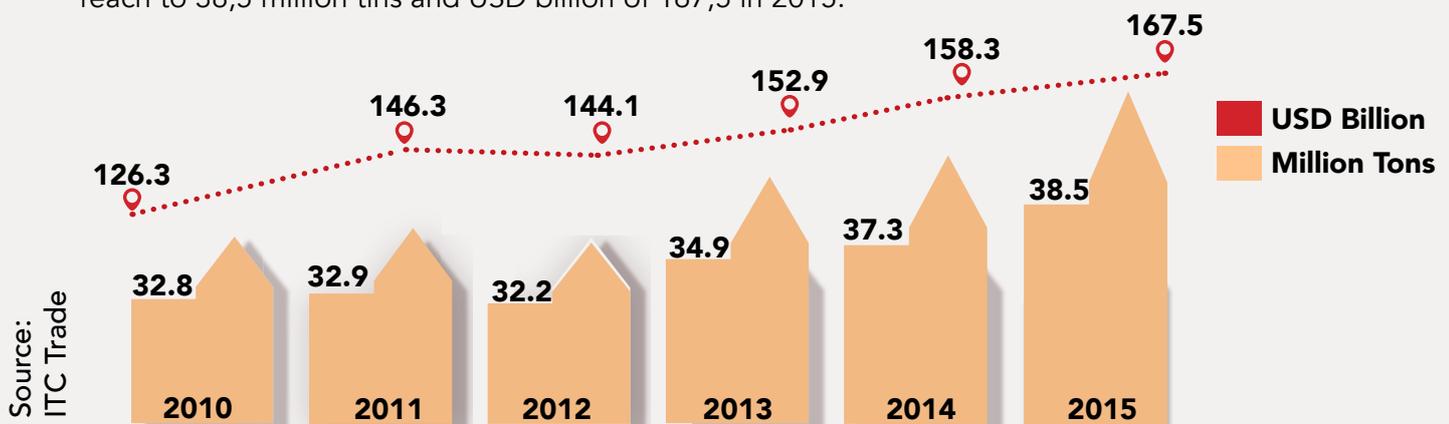


Figure 3: World Total Plastics Packaging Materials Exports

1.7. WORLD PLASTICS PACKAGING MATERIALS EXPORTS BY COUNTRIES

10 plastic packaging materials shared 74 % of total imports on amount base and 71 % share in value basis. The packaging materials in the following table CN numbers of 392010, 391990, 392190, 392310 and 392321 took place in the first 5 place among all other materials in imports.

GTIP	CN Description	Million Tons	USD Billion	%-Ton	%-\$
392010	Plastic film etc; polyethylene	4.9	15,7	13,2	9,9
392190	Other joining plates of polymerization products , sheets, film, etc. non-porous	2.9	15.0	5.3	9.4
391990	The adhesive sheet, plate , strip , strip, film , foil ; the others	2.0	15,3	7.8	9,6
392321	All liquids ichi bags (including cones) ; polymers of ethylenen	4.1	11.4	10.9	7.2
392310	Plastic boxes , crates , boxes and so on. Goods	3.5	12.1	8.2	7.6
392020	Other plastic plates , sheets , film , etc ; polymers of ethylene	3.1	10,7	5.9	6.7
392330	Carboys, bottles , flasks etca	2.2	8.7	3.6	5.5
392062	PET film (flexible magnetic disks should i for 72mikrometr to < thickness < 79 microMeter)72mikroMeter	1.4	7.9	5.1	5.0
392350	Caps and capsules for bottles	1.9	7,0	4.7	5.0
392390	Other materials to packaging transporting goods from plasticsr	1.7	7,0	74.0	70.5
	Total 10 Materials	27.6	111,6	26.0	29.5
	Others	9.7	46,8	100	100
	Total	37.3	158,3	100	100

Table 5: World Total Plastics Packaging Exports by Products

1.8.

WORLD PLASTICS PACKAGING EXPORTS BY COUNTRIES

In 2014, 55 % of total world plastics packaging exports on amount base and 61 % of it in terms of value was carried out by 10 countries. China, Germany, USA, Japan and Italy comprise the leading five countries in total exports. Turkey shared 1,5 % of total world export in 2014.



Countries	Million Tons	%Ton	Countries	USD Billion	% USD
China	5.1	13.7	China	18.3	11.5
Germany	3.5	9.4	Germany	18.2	11.5
USA	2.6	7.1	USA	15.7	9.9
Mexico	1.8	4.9	Japan	10.7	6.7
Italy	1.8	4.9	Italy	7.8	4.9
S. Korea	1.2	3.1	S. Korea	6.9	4.3
Netherland	1.2	3.1	France	5.5	3.5
Belgium	1.1	2.9	Belgium	5.0	3.1
France	1.0	2.8	Netherland	4.8	3.0
Taiwan	1.0	2.8	Taiwan	4.5	2.8
10 Countries Total	20.4	54.8	10 Countries Total	97.1	61.4
Others	37.3	100	Total	158.3	100.0
Turkey	0.7	1.9	Turkey	2.4	1.4

Source: ITC Trade Statistics

Table 6: World Total Plastics Packaging Exports by Countries (2014)

2.0.

TURKISH PLASTIC PACKAGING MATERIALS INDUSTRY

2.1.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 database, total manufacturing capacity of 1854 registered companies is defined as: (1.188.2008 tons + 2.626.400.207 m² + 421.630.400 meters + 4.497.991 pieces)

Products	No of Companies	TON	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 cans	235	86.589			2.008.991
Storage Containers	543	279.737			1.648.000
Packings Bags	734	493.000	1.247.482.460		841.000
Total	1.854	1.188.208	2.626.400.207	421.630.400	4.497.991

Source: TOBB (The Union of Chambers and Commodity Exchange of Turkey)

Table 7: Installed Capacity of Plastics Packaging Industry

According to PAGEV data base, about 1.423 companies are operating in plastics packaging materials industry, 61 % of which located in Istanbul. More than 10 companies that operate in 14 the provinces 14 account for 83 % of total companies.



Province	No of Companies	% Share	Province	No of Companies	% Share
İstanbul	871	61	Denizli	23	2
İzmir	84	6	Mersin	17	1
Konya	57	4	Kayseri	16	1
Ankara	51	4	Manisa	15	1
Bursa	51	4	Samsun	13	1
Gaziantep	42	3	Antalya	11	1
Kocaeli	40	3	Other	105	7
Adana	27	2	Total	1423	100

Source: PAGEV Data Base

Table 8: Plastics Packaging Materials Manufacturers by Provinces

PLASTICS PACKAGING MATERIALS PRODUCTION

Total manufacturing of plastic packaging materials, which was 2,8 million tonnes and USD billion of 11,3 in 2011, realised as 3,4 million tonnes and USD billion of 11,6 in 2015 with an annual average increase of 5 % on amount base and 1 % increase on value base for the last 5 years.



Figure 4: Plastics Packaging Materials Production

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

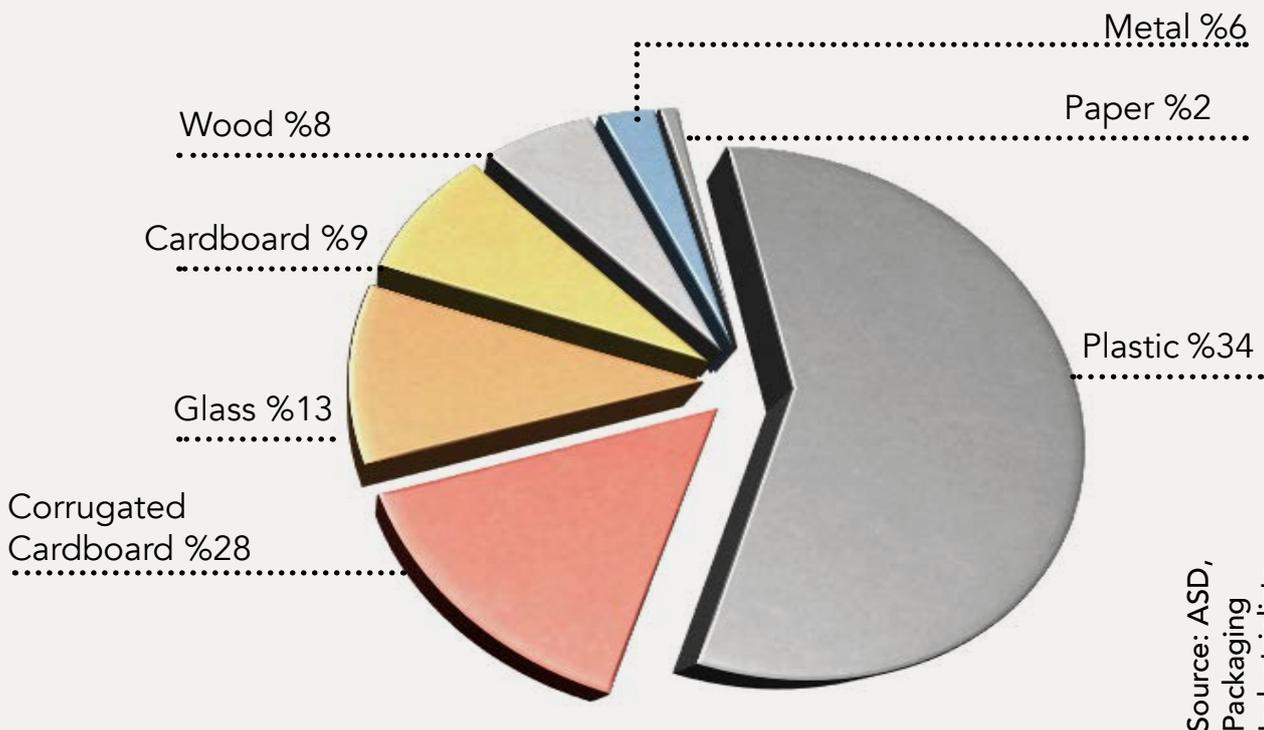


Figure 5: Packaging Industry Production by Materials

PLASTICS PACKAGING PRODUCT FOREIGN TRADE

Plastics packaging foreign trade can be examined by 5 custom duty code numbers specified as follows with CN numbers of 39.19, 39.20, 39.21 and 39.23.

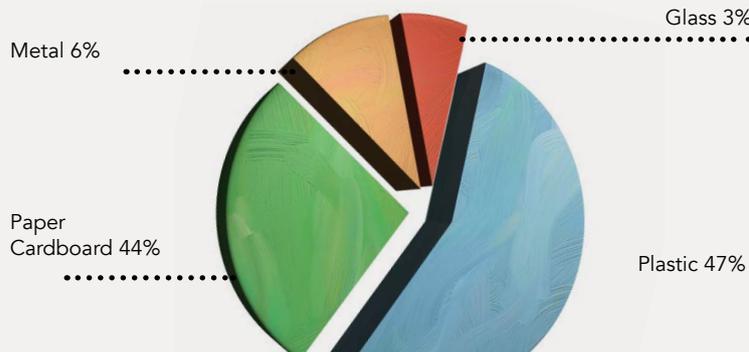
CN NO	DEFINITIONS
3919	ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT
3920	OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC
3921	OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM
3923	PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE

Source: TURKSTAT

Table 9: The Materials Groups of Plastics Packaging Industry

2.4. PLASTICS PACKAGING PRODUCTS IMPORTS

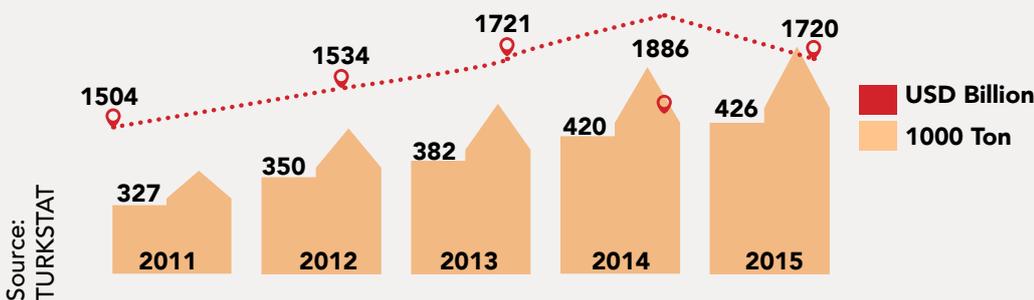
Although Turkish plastics packaging is sufficient to meet the requirements of requirements of the domestic manufacturing industry with its structural and technological aspects, the materials are imported come with their own packaging materials. As new products begin to be manufactured in Turkey, their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

Figure 6 : Share of Plastics Packaging Materials in Total Packaging Imports

The imports of plastics packaging materials which was 327 thousand tones and USD billion of 1,5 in 2011, realised as 426 thousand tons and stood at USD billion of 1,72 in 2015 by increasing by 7 % in amount base and 3,5 % in value base for the last 5 years.



Source: TURKSTAT

Figure 7: Plastics Packaging Materials Imports

CN NO	2014	2015	% Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT	55	57	3.4
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC	252	256	1.5
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC	67	65	-2.3
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE	46	47	3.4
TOTAL IMPORTS	420	426	1.4

Source: TURKSTAT

Table 10: Plastics Packaging Materials Imports (1000 TON)

CN NO	2014	2015	% Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT	339	323	-4.8
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC	1004	922	-8.2
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC	298	254	-14.7
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE	246	221	-10.1
TOTAL IMPORTS	1886	1720	-8.8

Source: TURKSTAT

Table 11: Plastics Packaging Materials Imports (USD Million)

Plastics packaging materials imports, sharing % 68 of total plastics industry imports in unit base and receiving % 57 share in value base in 2011, its share increased to % 73 in amount base and decreased to 60 % in value base in 2015.



Figure 7 : Share of Plastics Packaging Materials in Total Plastics Imports

In Ton Base
In USD Base

2.5.

PLASTICS PACKAGING MATERIALS IMPORTS BY COUNTRIES

Plastic packaging products are imported from more than 80 Countries. The share of top 10 import partners within total imports realised as 71 % in unit base and 75 % in value base in 2015. 5 major import partners in 2015 are Germany, China, S. Korea Italy and France.



Countries	2014				2015				
	1000 Tons	USD Milyon	1000 Tons	% Share Milyon\$	1000 Tons	USD Milyon	1000 Tons	% Share Milyon\$	
Germany	69	383	16.6	20.5	Germany	72	336	16.9	19.5
China	102	321	24.3	17.2	China	103	310	24.1	18.0
S. Korea	30	172	7.2	9.2	S. Korea	29	154	6.9	8.9
Italy	34	160	8.1	8.6	Italy	36	144	8.6	8.4
France	15	87	3.6	4.7	France	15	76	3.6	4.4
UK	9	76	2.1	4.1	USA	7	68	1.6	3.9
Belgium	11	64	2.6	3.5	UK	8	64	1.9	3.7
USA	7	63	1.7	3.4	Belgium	12	61	2.9	3.5
Greece	11	39	2.7	2.1	Greece	11	36	2.7	2.1
India	10	35	2.4	1.9	Netherland	7	33	1.7	1.9
10 Countries Total	299	1400	71.3	75.0	10 Countries Total	302	1282	71.0	74.6
Other	120	466	28.7	25.0	Other	124	438	29.0	25.4
Total	419	1866	100	100	Total	426	1720	100	100

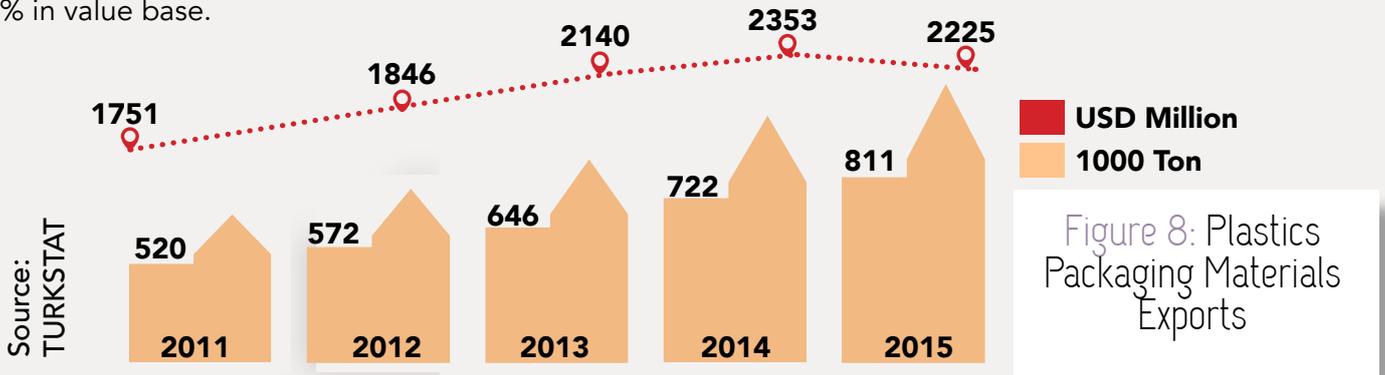
Source: TURKSTAT

Table 12: Plastics Packaging Materials Imports by Countries

2.6.

PLASTICS PACKAGING MATERIALS EXPORTS

Plastic packaging materials exports in 2011 which amounted to 520 thousand tons and USD billion of 1.75 increasing by 12 % in amount and decreasing by 6 % in value base, increased 811 thousand ton and USD billion of 2,23 in 2015. In 2015, compared to 2014, the exports of all plastics packaging materials other than described in 3919, increased by between 6,5 % - 16,5 % in unit base and decreased by between 0,9 % - 22,3 % in value base.



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

Table 13: Plastics Packaging Materials Exports (1000 Ton)

CN NO	2014	2015	%Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT	21	19	-7.1
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC	302	339	12
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC	121	129	6.5
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE	278	324	16.5
TOTAL EXPORTS	722	811	12.3

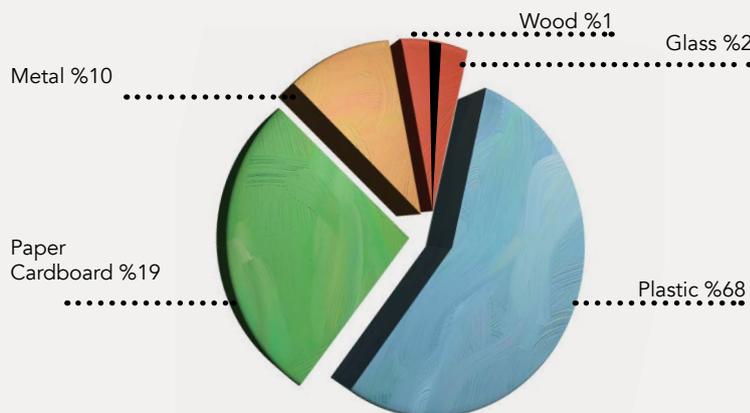
Source: TURKSTAT

Table 14: Plastics Packaging Materials Exports (USD Million)

CN NO	2014	2015	%Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT	148	115	-22.3
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC	968	915	-5.5
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC	420	386	-8.2
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE	816	809	-0.9
TOTAL EXPORTS	2353	2225	-5.4

Source: TURKSTAT

Figure 10: Total Packaging Materials Exports by Materials



Source: ASD, Packaging Industrialists Association

2.7.

SHARE OF PLASTICS PACKAGING MATERIALS EXPORTS IN TOTAL PLASTICS EXPORTS

Plastic packaging materials exports, sharing 45 % of total plastics industry exports in unit base and receiving 50 % in value base in 2011, increased its share to 51 % in unit and value base to 50 % in 2015.



Figure 10 : Plastics Packaging Materials Exports in Total Plastics Exports (%)

■ Ton Base
■ USD Base

2.8. PLASTICS PACKAGING MATERIALS EXPORTS BY COUNTRIES

Turkey exports plastic packaging products to more than 150 Countries, and 10 major export partners had 49 % share in unit and 48 % share in value base in 2015. In 2015, Germany, UK, Iraq, France and Italy kept their status of top 5 markets, to which we exported plastic packaging products.

Countries	1000 Ton	USD Million	%Share Unit	%Share USD	Countries	1000 Ton	USD Million	%Share Unit	%Share USD
UK	59	177	8.1	7.5	German	60	180	7.4	8.1
Germany	47	167	6.5	7.1	China	64	170	7.9	7.6
Iraq	67	159	9.3	6.7	S. Korea	86	169	10.6	7.6
France	28	111	3.9	4.7	Italy	30	102	3.7	4.6
Iran	19	97	2.7	4.1	France	34	90	4.1	4.1
Italy	32	96	4.4	4.1	USA	34	80	4.1	3.6
Netherland	21	86	2.9	3.7	UK	23	76	2.8	3.4
Azerbaijan	24	80	3.3	3.4	Belgium	18	72	2.2	3.3
Russian Fed.	17	73	2.4	3.1	Yunanst	11	59	2.6	2.7
Israel	26	70	3.6	3.0	Netherland	26	58	3.2	2.6
10 Countries Total	339	1115	47	47.4	10 Countries Total	394	1056	48.5	47.5
Other	383	1238	53	52.6	Other	417	1169	51.5	52.5
Total	722	2353	100	100	Total	811	2225	100	100

Source:
TURKSTAT

Table 15: 10 Major Export Partners

2.8.

BALANCE OF TRADE IN PLASTIC PRODUCTS

Turkey has foreign trade surplus in terms of amount and value in total foreign trade of plastic packaging products. Having been 194 thousand tonnes and USD million of 247 in 2011, the foreign trade surplus of plastic packaging materials increased at an annual average rate of 19 % in amount base and 20 % in value base and stood as 385 thousand tons and USD 505 million in 2015.

The foreign trade surplus is increased 27 % in amount base and 8 % in value base in 2015 with respect to 2014

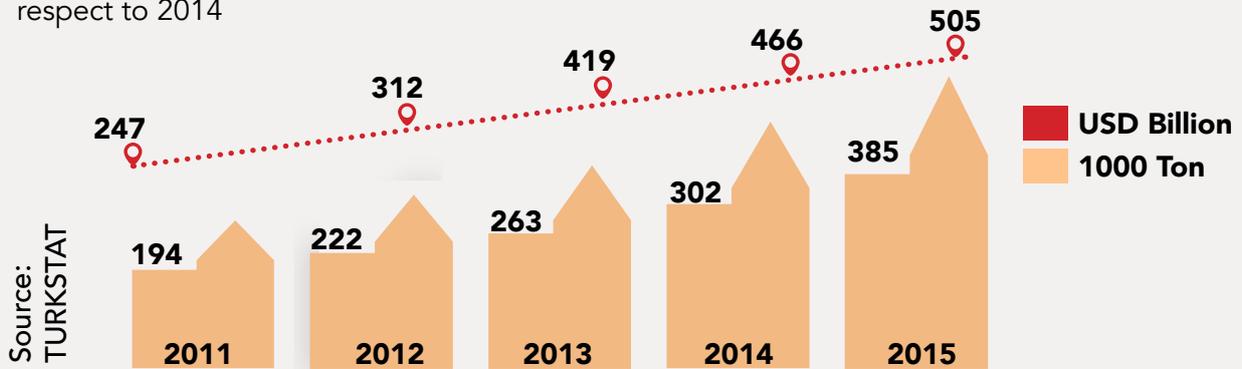


Figure 12: Plastics Packaging Materials Foreign Trade Surplus

CN NO	2014	2015	%Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT	-35	-38	10
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC	50	83	65
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC	54	63	18
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE	233	277	19
TOTAL SURPLUS	302	385	27

Source: TURKSTAT

Table 16: Foreign Trade Equilibrium in Plastics Packaging Industry (1000 Ton)

CN NO	2014	2015	%Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT	-190	-207	9.0
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC	-36	-7	-79
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC	123	132	8
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE	570	588	3
TOTAL SURPLUS	466	505	8

Source: TURKSTAT

Table 17: Foreign Trade Equilibrium in Plastics Packaging Industry (USD Million)

FOREIGN TRADE PRICES IN PLASTIC PACKAGING PRODUCTS

2.9.

Average import unit price realised as 4,0 USD / Kg and average export unit price 2,7 USD / Kg for plastic packaging materials in 2015. The import prices declined by 10 and export price by 16 compared to 2014.

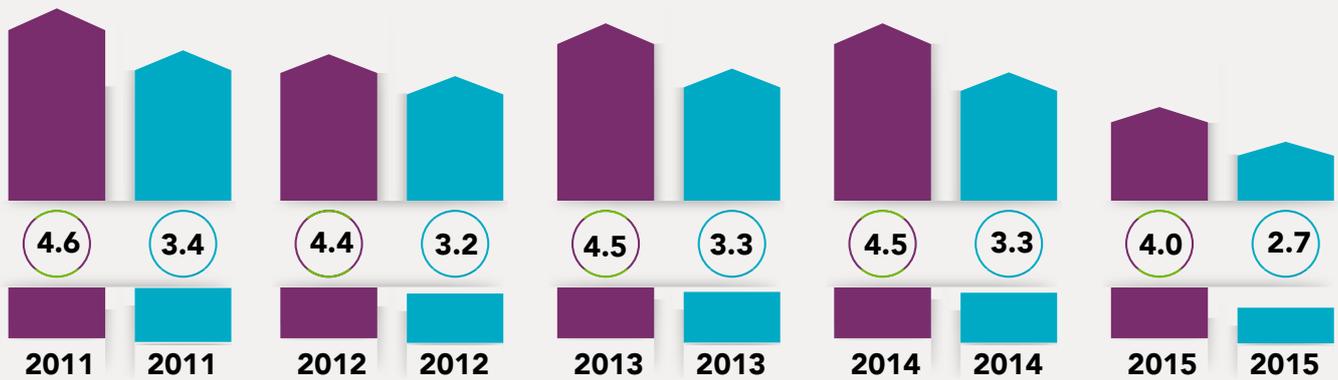


Figure 13 : Unit Foreign Trade Prices of Plastics Packaging Materials USD/ KG

Import Price
Export Price

CN NO	Unit Import Prices	2014	2015	%Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT		6.11	5.62	-7.9
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC		3.98	3.60	-9.5
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC		4.45	3.88	-12.6
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE		5.39	4.69	-13
AVARAGE		4.49	4.04	-10

Source: TURKSTAT

Table 18: Unit Foreign Trade Average Prices for Plastics Packaging Materials (USD / KG)

CN NO	Unit Export Prices	2014	2015	%Increase
ADHESIVE PLATE, SHEET, STRIP, SLIDE, ETC. FROM PLASTIC; FLAT		7.11	5.95	-16.4
OTHER PLATE, SHEET, PELLICULE AND SLIDES FROM PLASTIC		3.20	2.70	-15.7
OTHER PLATES, SHEETS, PELLICULES, FOILS AND SLIDES FROM PLASTIC		3.48	3.0	-13.8
PLASTIC PRODUCTS FOR MOVING FURNITURE, TAP, CAP, CAPSULE		2.93	2.5	-14.9
Total		3.26	2.74	-15.8

Source: TURKSTAT

Table 18: Unit Foreign Trade Average Prices for Plastics Packaging Materials (USD / KG)

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.

2.10.

DOMESTIC SALES

Domestic consumption of plastics packaging materials which was 2 million 648 thousand tons in 2011, increased at an annual average rate of 4 % in unit base and 1 % in value base and reached to 3 million 42 thousand tons and USD billion of 11,12 in 2015

Domestic consumption of plastics packaging materials increased by 0,8 % in unit base and declined by 10,3 % in 2015 with respect to 2014. Per capita consumption in Turkey realised as 39 KG and USD 141 in 2015.



Figure 13: Plastics Packaging Materials Domestic Consumption

2.11.

SUPPLY AND DEMAND EQUILIBRIUM IN 2015

In 2015 compared to 2014, regarding with the plastic packaging materials;

- ◉ Production increased by 3,2 % in amount base and decreased by 9,7 % in value base,
- ◉ Imports increased by 1,4 % in amount base and decreased by 8,8 % in value base,
- ◉ Exports increased by 12,3 % in amount base and decreased by 5,4 % in value base,
- ◉ Domestic sales increased by 0,8 % in amount and decreased by 0,3 % in value base,
- ◉ Trade surplus increased by 27,4 % in amount and 8,3% in value base.

	1000 Ton Base			USD million base		
	2014	2015	%Increase	2014	2015	%Increase
Production	3321	3427	3.2	12867	11624	-9.7
Import	420	426	1.4	1886	1720	-8.8
Export	722	811	12.3	2353	2.225	-5.4
Domestic Consumption	3019	3042	0.8	12400	11119	-10.3
Foreign Trade Deficit / Surplus	302	385	27.4	466	505	8.3
Export / Production (%)	22	24		18	19	
Import / Domestic Consumption (%)	14	14		15	15	
Export / Import (%)	172	190		125	129	

Table 20: General Supply and Balance Equilibrium in Plastics

As a result;

- ◉ 24 % of the total production was exported in amount base while 19 % in value base
- ◉ 14 % of domestic consumption was met by imports in amount and 15 % in value base.
- ◉ Export – Import coverage ratio realised as 190 % in unit and 129 % in value base.



RESULT

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.

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.

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CONNECTIVE POWER OF PLASTIC SECTOR



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