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FLEXIBLE PACKAGING SECTOR IN TURKEY INFORMATION NOTE



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FLEXIBLE PACKAGING SECTOR IN TURKEY

Although there are many companies producing flexible plastic packaging materials in Turkey, at least 75% of the production is directed by 13 companies.

Major Companies Manufacturing Flexible Plastic Packaging Materials

- Naksan Plastik ve Enerji San.Ve Tic.A.Ş.
- Koroza Ambalaj San. ve Tic. A.Ş.
- Polinas Plastik Sanayii ve Ticaret A.Ş.
- Süper Film Ambalaj Sanayi ve Ticaret A.Ş.
- Elif Plastik Ambalaj San. ve Tic. A.Ş. Rotopak Matbaacılık Ambalaj San. ve Tic. A.Ş.
- Bento Bantçılık ve Temizlik Maddeleri San. Tic. A.Ş.
- Polibak Plastik Film San. ve Tic. A.Ş.
- Bak Ambalaj San. ve Tic. A.Ş.
- ASAŞ Ambalaj Baskı Sanayi ve Ticaret A.Ş.
- Farmamak Ambalaj Mad. ve Ambalaj Mak. San. ve Tic. A.Ş.
- Pilenpak Ambalaj San. ve Tic. A.Ş.
- Kale Nobel Ambalaj San. ve Tic. A.Ş.
- İSPAK İzmit Sıvı Paketleme San. A.Ş.

The total production capacity of these companies is at a level to produce at least 1.5 million tons of flexible plastic packaging materials per year and production is conducted with an average capacity utilization of 80%.

Between 2017 and 2021, the average annual increase in terms of quantity was 14% in production, 4% in imports, 14% in exports and 13% in domestic consumption.

In 2021, approximately 25% of the production was exported and 6% of the domestic consumption was met by imports.

In 2021, 1 million 80 thousand tons of production, 55 thousand tons of imports, 295 thousand tons of exports and 940 thousand tons of domestic consumption were realized in the sector.

Flexible Packaging Supply and Demand Balance (1000 Ton)

	2017	2018	2019	2020	2021
Production	700	856	956	1.028	1.180
Imports	47	43	61	54	55
Exports	175	214	239	257	295
Domestic Consumption	572	685	778	825	940
Foreign Trade Surplus	128	171	178	203	240

Between 2017 and 2021, the average annual increase in value was 1% in production, 7% in imports, 1 0% in exports and 1 0% in domestic consumption.

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In 2021, the sector realized 3 billion 112 million dollars of production, 186 million dollars of imports, 778 million dollars of exports and 2 billion 520 million dollars of domestic consumption.

Flexible Packaging Supply and Demand Balance (Million \$)

	2017	2018	2019	2020	2021
Production	2.028	2.232	2.332	2.460	3.112
Imports	141	131	179	181	186
Exports	507	558	583	615	778
Domestic Consumption	1.662	1.805	1.928	2.026	2.520
Foreign Trade Surplus	366	427	404	434	592

The main countries from which Turkey imports flexible plastic packaging materials are Germany, Italy, China, France, Belgium, United Kingdom, USA, Spain, Poland, and the Netherlands.

The main countries to which Turkey exports flexible plastic packaging materials are UK, Germany, Israel, Iraq, USA, Netherlands, France, Greece, Italy, and Bulgaria.

The average import price of Turkey's flexible plastic packaging materials is 30% higher than the export price. In 2021, Turkey imported at \$ 3.4 per kg and exported at a price of \$ 2.6 / kg.

Flexible Packaging Foreign Trade Prices (\$/Kg)

	2017	2018	2019	2020	2021
Import Price	3,0	3,0	2,9	3,4	3,4
Export Price	2,9	2,6	2,4	2,4	2,6



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PLASTİK SEKTÖRÜNÜN BİRLEŞTİRİCİ GÜCÜ



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