



Turkish Flexible Packaging Sector

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Introduction

Basic objectives of the Flexible Packaging Manufacturers Association (FPMA) that was founded by 24 flexible packaging manufacturers are;

- To contribute to the development of flexible packaging industry,
- To give an identity to the sector,
- To raise our products to the level of production preferred by national and international norms, to maintain these products and to extend the fields of application in order to increase the market share of the flexible packaging produced in Turkey,
- To build scientific, technological and social cooperation and solidarity among our members in order to perform activities that will develop our industry,
- To have our products and sector represented in the national and international platforms and consequently to contribute

to increasing the economical level of our country.

The definition of flexible packaging covers the separate or combined production, supply and conversion of plastic films, aluminium foils and papers for applications such as all "primary" retail food packaging; pet food, hygienic products, detergents, Do-it-yourself products, litter bags, supermarket carry bag, non-food packaging such as stretch film, shrink film, band film; other special nonfood product packages such as

Flexible packaging goes through the phases of printing, laminating, cutting and ready-made production under hygienic conditions and is filled with the product to be packed in order to be used as packaging.

With flexible packaging we can make quite light, easily exchangeable, transportable and convenient small bags and sachets with a total thickness of <250/J and efficiency of 5-90 m²/k g [2],



Foto: Yayıla/Sana

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Functions of Flexible Packaging

Flexible packaging;

■ It performs the function of "primary packaging" that contacts food. Flexible packaging guarantees food safety until the moment it is consumed.

■ It preserves the first day freshness of the food during the recommended period: -it ensures that products stay fresh on the shelves until the expiry date thanks to its air, oxygen, gas, humidity, water vapour, UV beams, light and aroma barrier properties, - it ensures a shelf life of 1 day to 3 years depending on the designed structure of the packaging and the nature of the product that will be packed.

■ It protects food from external factors (physical) and biological, chemical, microbiological contamination.

■ It keeps the food content together, it presents the product to the consumer in a manner which is easy and safe to carry, store, distribute and open and close.

■ It allows the presentation of products in portions that fit the changing consumer structure of today so that consumers can buy the product in the quantity they want.

■ It gives information about how to consume the product it contains, about the content, nutritional values, production and expiry dates of the product, and it ensures safe consumption.

■ It creates attraction because of its aesthetics and design, connects to the consumer to draw him to the product, and it is a marketing tool in itself

■ It ensures continuity of brand awareness and encourages selective perception with its design.

■ It is a protective measure; it ensures that the product is not opened until it reaches the final consumer [2].

End User Sectors of the Turkish Flexible Packaging Sector

End user sectors of the flexible packaging market:

- Sweets, chocolate and candies;
- Cheese and dairy products;
- Dry foods and breakfast cereals;
- Snacks and nuts;
- Bread, biscuits & cakes (baked food made of flour);
- Coffee powder & coffee grains;
- Fresh & processed meat, fish and poultry;
- Frozen food & ice-cream;
- Fresh fruit and vegetables;
- Other food;
- Cigarette and tobacco;
- Medical and cosmetic products;
- Cleaning agents / hygienic products;
- Pet Food;
- Other non-food products (litter bags, supermarket carry bags, stretch film, shrink film, band film) [3].

Information on the Turkish Flexible Packaging Sector

As the main raw material used in the flexible packaging sector, polypropylene production figures in Turkey was 132.500 tons corresponding to 237,4 million USD at the end of 2004. 87.676 tons of this amount was consumed by the domestic flexible converters and 44.824 tons corresponding to 75,5 million USD was largely exported to the European countries. As a result of the extension investments of polypropylene producers, Turkish production capacity increased to become 210.000 tons in 2005. Furthermore, 20.500 tons of polypropylene has been imported besides the domestic production.

As the other raw materials used in the sector,

polyethylene has a production figure of about 271.076 tons, paper about 73-500 tons, aluminium 12.280 tons, PVC 15.000 tons and PET 4.890 tons at the end of 2004 [5]. Total production in the flexible packaging sector is about 457.291 tons corresponding to 970 million USD at the end of 2004. The total export performance of the sector in 2004 has been about 420 million USD [6].

At the end of the researches performed by PCI Films Consulting Limited and FPMA, it was found that flexible packaging requirements of the Turkish market have grown by 5-6 percent. The researches by the Turkish flexible packaging manufacturers have revealed that export figures of the sector have grown by about 10-12 percent per annum.

Since there has been very heavy investments of high technology in the flexible packaging sector in the past 5-year periods, there is a serious competition among the players in the sector because the established capacity is well above the country's requirements. On the other hand, our research indicates that established capacity of the Turkish flexible packaging sector is about 665.000 tons. Given the estimated production figures for 2005, this means that capacity usage rate is about 72 percent.

In 2004, the annual flexible packaging consumption figures per person was 4,05 kg/year on the average (census for 2004 was 71,8 million people).

In Turkey, there are a total of 93 flexible packaging producers operating with 124 Rotogravure and 91 Flexo printing machine parks [1].



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