

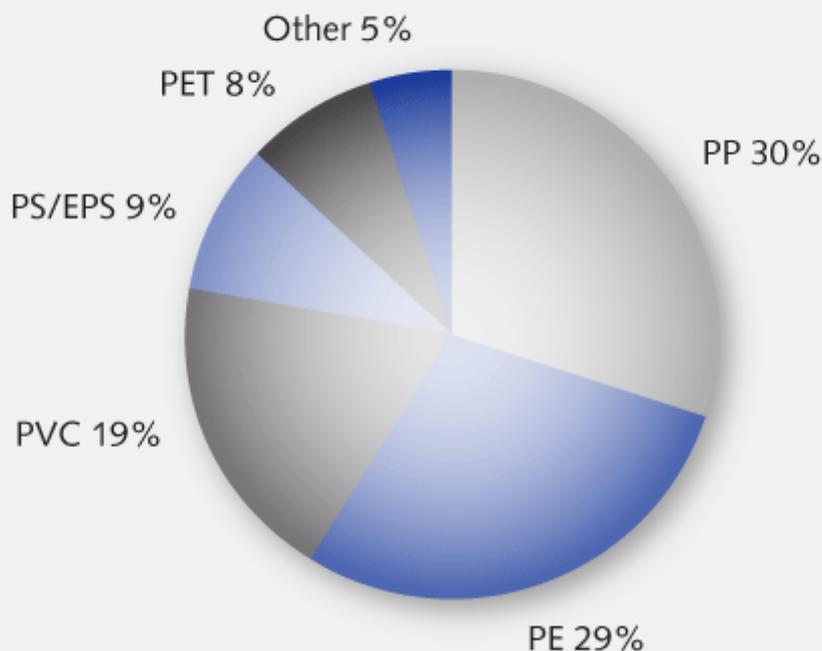
TURKEY

Europe's fourth-largest plastics converter processed 3.5m t of plastics in 2009 / Packaging applications lead the way / Extrusion as most common processing technique / AMI reports

Some 3.5m t of thermoplastics were processed in Turkey in 2009, according to a new study published by **Applied Market Information** (AMI, Bristol / UK; www.amiplastics.com), making it Europe's fourth-largest plastics converter, ranked behind Germany, Italy and France but ahead of the UK and Spain. With regard to man-made textiles, AMI found, Turkey even ranks second in Europe. The figures presented in "Plastics Processing in Turkey – 2010" are largely in line with previous data published by the Turkish plastics industry association **PAGEV** (Istanbul; www.pagev.org.tr), which ranked Turkey fifth place among European plastics processing countries in 2008 – see PIEWeb of [24.09.2009](http://www.pieweb.com).

Despite setbacks incurred as a result of the global financial crisis, Turkey's plastics processing industry continues to show great promise for the future, the British market researchers assert, and could soon overtake France in terms of output of processed plastics. This promising outlook is based on Turkey's having carved out for itself a leading position in the fields of textiles, converted flexible packaging and building products, increasing local demand and Turkey's prominent role as a regional export country.

**Demand for Thermoplastics in Turkey
2009 by type (total: 3.5m t)**



© 2010 Plastics Information Europe

Source: Applied Market Information

Because domestic plastics production capacities are very small, more than 85% of Turkey's polymer demand is met by imports and the country is 100% dependent on imports to meet its PS, ABS, PET and engineering polymers demand. More than 90% of PP is imported, and about 81% of PVC and 66% of PE needs are met by imports as well. This situation, AMI says, is unlikely to change in the immediate future, although several new refinery complexes are scheduled

to come on stream in the coming years, including that of the country's largest petrochemical producer **Petkim** (Aliaga; www.petkim.com.tr) – see also PIEWeb of [26.02.2010](#).

Despite this capacity shortage, Turkey's polypropylene fibre industry is very well established, AMI says, which explains why PP accounted for a little more than 30% of total polymer consumption in 2009, used mostly in cast and bioriented films for packaging. At 29%, polyethylene consumption was slightly lower. Predominant PE applications include flexible packaging and pipe extrusion. Ranked third is PVC, accounting for 18% of total consumption and used mostly in pipes and profiles for construction. With impressive growth rates of 17% annually from 2003-2008, PET is the fastest growing polymer in terms of consumption, AMI found.

Most polymers destined for packaging applications

At 40%, a little less than half of the polymers processed in Turkey went into packaging applications in 2009, AMI found. The country's well-developed and rapidly growing flexible plastics packaging sector is not only catering to domestic demand, but geared towards exports markets, too, primarily in the CIS and Ukraine.

Although the construction sector saw growth rates slow significantly in 2009, the segment still accounted for 25% of total polymer demand. Main applications include pipes and window profiles, AMI found, which Turkey exports to Europe, the CIS, the Balkans and the Middle East.

Some 14% of polymers processed in Turkey in 2009 went into textiles. Mostly export-oriented, the country's large PP textile industry has suffered setbacks as a result of the economic crisis and increased competition from Asia, the British market researchers say.

Last but not least, some 10% of polymers processed last year went into consumer electronic goods and appliances, most of which were destined for export.

Most plastics processed in Turkey are extruded

Pipe and profile extrusion account for the largest share of plastics processed in Turkey. Most are made of PVC, AMI found, although PP and PE also play a strong role. Leading local pipe extruders include **Firat Plastik** (Istanbul; www.firat.com), **Mardin Boru San** (Mardin; www.marlit.com.tr), **Güven Plastik** (Izmir; www.guvenplastic.com) and **Pilsa Plastik** (Adana; www.pilsa.com.tr). The profile extrusion field, by contrast, is dominated by **Deceuninck** subsidiary **Ege Profil** (Izmir; www.deceuninck.com), **Adopen Plastik** (Antalya; www.adopen.com.tr), **Pakpen** (Konya; www.pakpen.com.tr), **Pimas Plastik Insaat Malzemeleri** (Kocaeli; www.pimas.com.tr) and **Hatipoglu Plastik** (Eskisehir; www.europen.com.tr).

The second most common processing technique is film extrusion, with final products destined mainly for the packaging and agricultural markets. Leading local PE film extruders include **Naksan Plastik** (Gaziantep; www.naksan.com.tr), **Isbir Sentetik Dokuma** (Istanbul; www.isbirsentetik.com), **Vatan Plastik** (Istanbul; www.vatanplastik.com), **Koroza Ambalaj Sanayi** (Istanbul; www.koroza.com.tr) and **Elif Plastik Ambalaj** (Istanbul; www.elifplastik.com.tr).

Despite its comparatively large size, Turkey's injection moulding sector is rather fragmented and dominated mostly by smaller players, AMI found. Some of the larger processors include **Mutlu Plastik** (Usak), **La Seda** subsidiary **Artenius Turkpet** (Bursa; www.artenius.com), **ÇPS Plastik** (Mersin; www.ortiplastik.com) and **Sarten Ambalaj** (Istanbul; www.sarten.com.tr).

Other leading Turkish plastics processors include plastic bottle manufacturer **Koksan Kokoglu Ambalaj** (Gaziantep; www.koksan.com), cable manufacturer **Vatan Kablo** (Istanbul; www.vatan.com.tr) and thermoforming sheet extruder **Teknik Plastik** (Istanbul; www.teknikplastik.com.tr), which entered into a joint venture with **Sealed Air** (Saddle Brook, New Jersey / USA; www.sealedair.com) in 2007 – see PIEWeb of [21.09.2007](#).

29.04.2010 PIE [216101]