

INVESTMENT POTENTIAL FOR FOOD PACKAGING INDUSTRY IN DEVELOPING COUNTRIES

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BELL HOLDING

- * A B2B GROUP ACTIVE IN
PACKAGING (Bell Packaging Group)
BUSINESS SERVICES
- * OVER TIME DEVELOPED MANY JOINT
VENTURES WITH LEADING
MULTINATIONAL COMPANIES

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BELL PACKAGING GROUP

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BELL PACKAGING GROUP

-  800+ people
 58 years of experience in Packaging
7 plants (6 of them in Turkey ,1 in Bulgaria)
80.000+ Sqm production area

- Market Leader in all sectors where it is present
- Our engineers are capable of assisting our customers from the design phase until the production of new packaging solutions.
- We have the top technical expertise in the country in our fields of operation.
- ISO certified- 9001, 14000, 22000, BRC (food safety, environmental ..)
- Hygienic areas for production of pharma and food packages.

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GROUP COMPANIES

SENAPA STAMPA

PE,PET,PVC,PP bottles

INTERKAP

Injection molded Caps, Closures and Components

TULIPACK

Plastic Tubs and Lids for Food- Thin Wall -IML

PERFEKTUP TR & PERFEKTUP BG

Laminated Plastics Tubes, Collapsible Aluminium Tubes

PERFEKTUP AEROSOL

Monobloc Aerosols cans

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BELL PACKAGING GROUP

OUR PRODUCTS

- **PLASTICS (12.000 tonnes)**
PE,PET,PVC,PP bottles (50ml to 20Lt)
Injection molded Caps,
Closures and Components
Thin Wall-IML Tubs and Lids
- **LAMINATED TUBE (150 million tubes)**
Tubes
- **METAL- Aluminium Tubes & Cans**
Collapsible Tubes, (500 million)
Monobloc Aerosols cans (100 million)

THE SECTORS WE SERVE

- **PERSONAL CARE**
Hair,Toothpaste,Bath/Shower,
Cosmetics,Deodorants
- **HOME CARE**
Detergents,Laundry,AirFreshener
- **HEALTH CARE(Pharma)**
- **FOOD**
Confectionary, Ice cream,
Savoury, Chewing Gum
- **CHEMICAL / OIL**

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KEY COMPETENCIES

- Customer driven growth, Close Customer relations
- Single sourcing, turnkey solution
- High Technical Expertise
- Quick and decisive response - Investment projects
- Wide Industry coverage
- Technology Leadership

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PLASTIC BOTTLES, CAPS, CLOSURES



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THIN WALL- IML PRODUCTS



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COLLAPSIBLE ALUMINUM TUBES



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AEROSOL CANS



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DEVELOPING AND EMERGING COUNTRIES ARE NO LONGER THE FUTURE BUT THE PRESENT

- * SHARE OF WORLD GDP
- * SHARE OF GDP GROWTH
- * SHARE OF WORLD TRADE
- * SHARE OF MULTINATIONALS BUSINESS

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WHY ?

- * RAPID URBANISATION
- * MIDDLE CLASS GROWTH
- * DEVELOPMENT OF ORGANISED TRADE

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RESULT

**HUGE POTENTIAL FOR PACKAGED GOODS
(FMCG)**

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CATEGORIES

- HOME CARE
- PERSONAL CARE
- HEALTH/PHARMA
- FOOD

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CHARACTERISTICS OF FOOD PRODUCTS/MARKETS

- DO NOT TRAVEL AS EASILY
 - . PERISHABLE
 - . MORE SUSCEPTIBLE TO HEAT/HUMIDITY ETC.
- MARKETS ARE MORE REGULATED/ TRADE MORE RESTRICTED
 - . PROTECTION OF FARMERS
 - . PROTECTION OF CONSUMERS
- TEND TO HAVE HOME GROWN CHAMPIONS

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RESULT

MARKETS OF FOOD PRODUCTS ARE LESS
OPEN TO IMPORTS

CASE IN POINT : TURKEY

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FOOD PACKAGING IMPORTS VS LOCAL PRODUCTION

- TRANSPORTATION COSTS
- COMPLEXITY (LOCAL LANGUAGE NEED/
LOCAL SIZES)
- PLANT CERTIFICATION NECESSARY
- JUST IN TIME DELIVERY
- MINIMUM ORDER QUANTITY

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OTHER POINTS TO CONSIDER

- EMERGING MARKETS ARE ALREADY QUITE SOPHISTICATED
 - VARIETY
 - CHANGING TASTES
 - STANDARDS
- VERY TOUGH COMPETITION
 - PRICE & TERMS
 - SERVICE
 - QUALITY
- ON THE POSITIVE SIDE THEY ARE OPEN FOR NEW INVESTMENT

CONCLUSION

INNOVATION IS KEY

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THANK YOU

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