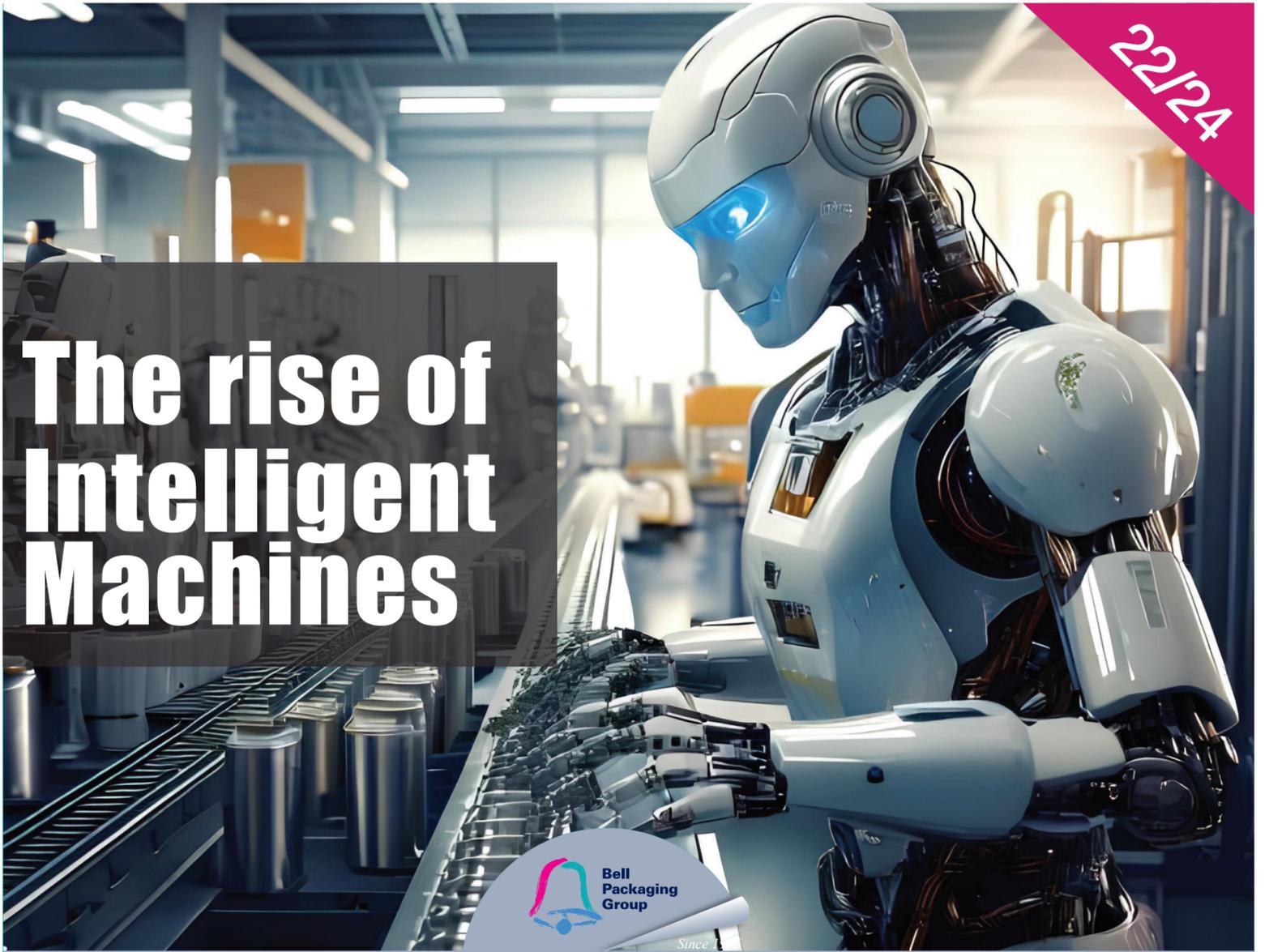


The rise of Intelligent Machines



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"A European leader in aluminium tubes, monobloc aerosol can and laminate tubes manufacturing"



"Turkey's leading plastic bottle manufacturer for FMCG products."



"A world class producer of injection moulded plastic caps, closures and components."



"A thin wall plastic tubs and lids producer at the center of advanced technology and service."



"A new player of the packaging sector with its revolutionary printing solutions."



"The integration center of the circular economy in the FMCG packaging."

PARIS PACKAGING WEEK 2025

28-29 January
Stand: V70



COSMOPROF
WORLDWIDE BOLOGNA

20-22 March

Salon: 20
Stand: E18

CEO Message

Dear Readers,

The headline of this issue will remind some of us the terrifying future foreseen in the Terminator movies and indeed a lot of people are worried at what might happen if the progress made in the AI field combines with the mechanical progress made in robotics. Will we end up with self aware humanoids which may escape our control. Fortunately that is still in the realm of science fiction and beyond the scope of this editorial.

Having said that intelligent machines have the potential to bring considerable benefits for all in the manufacturing sector. At shop floor level the idea that LLM can drive the next stage of automation is slowly taking roots. Many plants have been operating robots for a long time but these are mostly programmed to perform specific repetitive tasks and have to be reprogrammed if they are required to perform another task. Their performance does not improve over time. They have certainly increased productivity and quality (mainly with lower defects) but the paradox described in the nineteen-eighties by Hans Moravec, a Canadian roboticist, namely that the tasks that are easiest for humans to perform, such as using our hands to grasp things, are often the hardest for computers to do, still remains true.

In order to drive the next stage of automation and therefore bring a further material increase in productivity with a parallel reduction in unit production costs we will need to develop machines which can learn and improve over time so as to perform different tasks without the need to be continuously reprogrammed. Moreover the know-how developed by one machine will be able to be passed to all others as simply as if downloading an app. This is where LLM and AI will come into play. However, in order to get there is a need for a very close collaboration between all the members of the ecosystem as well as academia but in a not so distant future an ageing population with higher expectations from life, so with less people available or willing to perform menial and shift work, more automation seems the only way forward to continue producing all the fast moving consumer goods people want in enough quantities and at an affordable cost.

Obviously this is a process which will take a long time but it is essential to have a groundwork and organization which will enable us to participate in these developments. This is why our most recent plants such as the Kırklareli one for aerosol cans is designed in a way to allow the automation of processes. At the same time we are busy collecting data from sensors all through our production lines which will provide the information needed to teach the machines the tasks they will have to perform. The IT and R&D departments of our group companies are also growing and we will continue to invest in both. As we are approaching our 85th anniversary we are excited at the possibility to co-develop the technologies which will keep us relevant in future to bring an ever more competitive offering to our customers and contribute to their success. This has been another eventful year in this part of the world, and we would like to take this opportunity to thank all our business partners for their trust in us and wish them a new year full of sustainable growth opportunities.

Yours Faithfully,

Livio Manzini
Chairman & CEO

prs
Plastics Recycling Show
EUROPE
1-2 April 2025 RAI, Amsterdam
See us on Stand H106
Organised by **CRAIN** PLASTICS RECYCLING EUROPE

beauty **istanbul**
8-10 May
Lounge: 4
Stand: 4A 110

RePlast
Eurasia
2. Plastik Geri Dönüşüm Teknolojileri ve Ham Maddeleri Fuarı
8 - 10 Mayıs 2025
Tüyap - İstanbul

CPHI
Frankfurt
28-30 October
Lounge: 4
Stand: 8B12

beautyworld
MIDDLE EAST
27-29 October
World Trade Center, Dubai

The Wheels are in Motion at the new Perfektüp Plant in Kırklareli...

The new Perfektüp Kırklareli factory, strategically located between Istanbul and Europe, spans 75,000 m² of land and 100,000 m² of closed area. Built with a focus on minimizing environmental impact and sustainability, our plant is qualified for the LEED green building certification. The gases generated from production are treated, scraps are sent for recycling, rainwater is collected for irrigation and firefighting, when installed solar panels will provide a significant portion of our energy needs, and the water used in production is treated and reused. With the launch of our new aerosol can production line in Kırklareli, equipped with the latest technologies, our aerosol can production capacity has increased to 240 million annually.



PERFEKTÜP R&D Sustainability Solutions

For the packaging industry, sustainability and circular economy will become more important than ever in the coming years. The most important goal for a more livable world is to reduce the impact of packaging on the environment. In this regard, important work is being done on the recycling of products after consumer and industrial use and their reintegration into the economy. The majority of consumers also prefer products made from recycled materials. Unfortunately, time is needed for this matter as recycled materials cannot meet the demand and are more expensive than raw materials. Therefore, Perfektüp has made a major investment in R&D and implemented a project to reduce the grammage of currently used aluminum slugs. The innovative work being done



has enabled the production of the same product with the same quality but lighter aluminum slugs (average 10% saving), i.e. by using less raw materials, contributing to both sustainability and reducing the carbon footprint. This also means a decrease in emission values arising from the production of aluminum slugs and logistics.

SENAPASTAMPA is Getting Stronger with the Developments in its Machine Park



- SenapaStampa has renewed its retrofit (complete electronic system) due to the fact that the electrolink cards and control screen in 4 techne machines in its central facility located in Kocaeli- Gebze could not be supplied as spare parts. The electronic cards and screens that are removed will be used as spare parts in other techne machines and thus, any problem of spare part stock that may occur in the future will be prevented from now on.
- SenapaStampa has carried out improvement work on Leak testers (Bottle hole test control device) used in existing machines at its central facility located in Kocaeli-Gebze. A self-check system (self-verification of the System)

has been put into operation in leak testers and the system ensures its accuracy by testing itself in the quantities determined by the company. Thanks to this development, SenapaStampa also supports its quality policy.

- SenapaStampa has carried out technical work to improve working conditions at its central facility located in Kocaeli-Gebze by installing a radiator in front of the existing ventilation system and placing a 150,000 kcal cooling unit. In this way, the minimum ambient temperature has been reduced by 6 to 8 degrees. Thus, a better working environment has been provided for our colleagues, and efforts in this regard will continue in both the central and branch factories.

TO-KA Develops Partnerships With Consumer Product Brands on Circular Economy Theme



Standing out with its sustainable digital waste management platform, which collects post-consumer packaging separately and cleanly at the source, To-Ka has launched the “Green Salon” project in hair salons using L’Oréal products and the “Green Paw” project with Nestlé-Purina in pet shops.

The “Green Salon” project, initiated in collaboration with To-Ka, aims to collect and recycle recyclable packaging materials in L’Oréal’s professional hair salon channels. For the first time in Turkey, the project was launched in eight hair salons in Istanbul. To-Ka member salons collect post-consumer PET bottles, plastic, and aluminum packaging and, using the To-Ka mobile application, schedule a pick-up service with To-Ka’s electric vehicle. They then hand over the collected packaging to on-site staff at the specified address. For each collected package, they earn reward points, which can later be converted into various economic values.

In the partnership with Nestlé-Purina, the “Green Paw” initiative has been introduced at four selected pet shop locations on both the European and Asian sides of Istanbul. Under this project, recyclable flexible packaging and PET bottles, plastic, and aluminum packaging are collected with To-Ka’s assistance, cleanly separated at the source. For every collected pet food package, Purina donates 1 kg of food, and To-Ka member pet shops have the opportunity to convert the post-consumer packaging they collect into value in the form of cash/points. The packaging brought in by consumers is stored by To-Ka member pet shops and can be redeemed as reward points or donated.

To-Ka members can also choose to donate their collected points to the Turkish Education Volunteers Foundation (TEGV) with a single click using To-Ka’s digital waste management platform. Through this partnership, To-Ka, L’Oréal, and Nestlé-Purina are creating a meaningful environmental and social impact.

While L’Oréal and Nestlé-Purina continue to be recognized for their commitment to sustainability and circular economy initiatives, we aim to expand this significant collaboration with To-Ka beyond Istanbul to other big cities through Türkiye. We would like to thank L’Oréal and Nestlé-Purina for partnering with us on these two exemplary initiatives.





Bülent Eczacıbaşı, Chair of the Board of Directors, Eczacıbaşı Holding

The Eczacıbaşı family is renowned for its significant contributions to a wide range of fields in Türkiye, from healthcare to building materials, from culture and arts to sports. Could you begin by telling us about the milestones of the Eczacıbaşı Group's successful development?

Our story begins in 1942, when our father Nejat Eczacıbaşı undertook a series of investments that would later become the cornerstone of our business. Small-scale operations in ceramics and pharmaceuticals paved the way for Türkiye's first modern pharmaceutical production plant and large-scale investments in the ceramics industry. In following years, Eczacıbaşı diversified into other areas such as consumer products and natural resources. In the 1980s, when the Turkish economy began to open up to global trade, Eczacıbaşı started to increase its presence in international markets. Currently, our Group generates more than half of its sales revenues from abroad. Eczacıbaşı's social initiatives were a natural part of this development process. The history of the Istanbul Foundation for Culture and Arts (IKSV) dates back to 1972, the Eczacıbaşı Sports Club to 1966, and the establishment of the Istanbul Museum of Modern Art to 2004.

We know you were a successful student throughout your school years, even graduating from the German High School with top marks in all subjects. On the advice of your father Nejat Eczacıbaşı, you also treated your university education as an opportunity for cultural and artistic development. How has this perspective reflected on your business life?

My father believed that higher education should endow a person with more than expertise and a diploma in a chosen field. I believe in a well-rounded education as well; people who don't confine themselves to a narrow area of expertise achieve greater success. Culture and art are an important part of higher education, but more broadly, I'm referring to importance of general culture. In today's world, young people have the difficult task of developing both their specialized skills and a good grasp of general culture. I'm afraid this is a condition for success in today's world.

Eczacıbaşı is a family company, as the name suggests, with a corporate structure. How do you balance this dynamic, and how do younger family members find their place in your corporate structure? What advice do you offer them?

We prefer not to appoint family members to direct executive roles in our organization. Despite best efforts, it simply isn't possible in a family business for family members to be evaluated objectively like professionals. The role of family relationships can't be ignored. Family members who aren't successful can't be removed from their duties, and sometimes they're assigned tasks that aren't compatible with their competencies. However, companies have management and specialist positions that don't directly involve senior executive roles and responsibilities. Family members should be appointed to such posts to give them a solid understanding of the company's operations and culture and prepare them to be good board members, chairpersons, and shareholders.

As an industrial group with 13,500 employees and many years in international markets, can you tell us something about your practices and management approach outside of Türkiye? Do they differ by region or country?

One of the Eczacıbaşı Group's fundamental principles is respecting the local dynamics and cultural differences in geographies where we operate. Accordingly, we adjust our practices strategically to the business culture and consumer expectations of the region in question. We also encourage hiring local personnel; not only do we benefit from their knowledge, we support local economies as well while advancing our global business goals.

Our management approach is guided by the principle of "centralized coordination, local decision-making." This model provides local flexibility while ensuring the effective implementation of our global strategies. Additionally, we treat innovation and digital transformation processes as global values, so we continuously invest in the development of our employees in these areas.

Drawing on your many years of experience, how have changes in consumer preferences and distribution channels caused by the pandemic impacted your business?

The pandemic caused profound changes in consumer habits. Demand for hygiene and health-focused products increased sharply. During the pandemic, we also developed innovative products and solutions for bathrooms, cleaning, and hygiene. Some of these solutions, such as antibacterial surface coatings and touchless bathroom products, not only responded to consumer needs but also served our sustainability goals.

In response to the emergence of new distribution channels and the rise of e-commerce, we accelerated our digital investments. We established a strong digital infrastructure to reach consumers directly with our products. We also adopted artificial intelligence and data analytics applications to make our logistics and supply chain processes more agile. In effect, the challenges created by the pandemic also created growth opportunities for us.

Could you tell us the sectors and geographical regions that hold the most growth potential for the Eczacıbaşı Group and related investment plans?

At Eczacıbaşı, we see the most growth potential in sustainability and technology-focused sectors. Accordingly, we plan to increase our investments particularly in innovative building products, health and hygiene products, and digital solutions. Geographically, we plan to further consolidate our strong presence in Europe with sustainable products, and to achieve steady growth in the Middle East and Africa through operations we have established and recent acquisitions. Our priority in the upcoming period is to focus on growth by efficiently utilizing the capacities of major investments we've made in our businesses over the past three years.

Could you tell us about the Eczacıbaşı Group's efforts with respect climate change, the protection of natural resources, and other issues of this kind?

The Eczacıbaşı Group takes a straightforward approach to sustainability. If we have access to technologies that improve the performance of our key sustainability indicators, we integrate them into our processes. If necessary, we develop investment plans and implement them within a specific timeframe. If the required technology is unavailable or underdeveloped, we try to contribute to larger-scale efforts through innovation and collaborations. We have two main areas of focus: The first is the broad-scale adoption



of technologies required by our existing organizations for their transition to a low-carbon economy. The second is being active in business fields shaped by the need and demand for sustainable living. Lifestyle and consumption patterns need to change if we're to achieve meaningful outcomes in the fight against climate change. We're improving our processes and expanding our product portfolio to contribute to this change and offer alternatives.

We're also prioritizing projects that combine digital transformation and sustainability. The positive results we've achieved in a short period have raised our enthusiasm and courage. Vitra Karo's Bozüyük facility was included in the World Economic Forum's Global Lighthouse Network of forward-looking production facilities. We're the first and only tile ceramic manufacturer on the short list of companies worldwide that have successfully integrated high technology into their processes. We're pursuing technological transformation throughout the Eczacıbaşı Group to facilitate our transition to a low-carbon economy. We're especially focused on using energy effectively and efficiently. We continuously monitor energy use at our facilities and implement new projects each year to further improve energy efficiency. These efforts enable us to both minimize our environmental impact and improve our operational efficiency through lower energy costs. Another key focus is the sustainability of products throughout their life cycles. We're particularly interested in goods and solutions that reduce water and energy usage during the lifecycle of our bathroom and tile products.

At Bell Packaging Group (BPG), our initiatives and investments are ongoing, and our aim is to become one of the regional solution partners for your group's packaging needs by leveraging our production centers. What would be your main expectations from us at this point?

Sustainability is the priority at Eczacıbaşı when it comes to packaging solutions. We prefer to work with partners who develop environmentally friendly, recyclable solutions that will reduce the carbon footprint of our products. Quality and innovation are also priorities for us. It's critically important that packaging solutions ensure the safety of our products and meet our aesthetic expectations.

Another important point is flexibility and reliability. Uninterrupted supply processes are vital for the smooth running of our global operations, so we strive to establish long-term relationships with solution partners with timely delivery and a high production capacity.

We would like to thank Mr. Bülent Eczacıbaşı for the interview.

Bell Group Search Conferences Held in Sapanca

The Search Conferences, aimed at defining the corporate vision, mission, main objectives, and strategies for Perfektüp and Bell Plastik Packaging Group, were held on July 5-6 and November 8-9 in Sapanca.



Designed to foster “collective intelligence,” the conferences brought together approximately 100 employees from group companies and were moderated by Prof. Dr. Oğuz Babüroğlu, founder of ARAMA Consultancy, who has facilitated over 2,500 similar sessions.

During these intensive two-day conferences, group workshops and presentations focused on answering the question of how Bell Group can become even stronger in the years to come.

SenapaStampa, Young Talent Program “You are the owner of future”

Our Group company SenapaStampa Ambalaj Sanayi ve Ticaret A.Ş. has set its social goal as creating awareness in our young people, who are the owners of tomorrow, about the dynamics of the business world. Accordingly;

- During the year, theoretical information aiming at building career for young people will be provided in schools with seminar plans to be implemented by the Human Resources Department.
- Within the scope of the internship quota, SenapaStampa will offer the opportunity to gain experience with theoretical and practical information for young people, the owners of tomorrow, under the mentorship of experienced professionals.
- After the internship, it may offer long-term work opportunities for vacant positions in the company staff.
- Thus, SenapaStampa will strengthen the communication network in terms of school-industry cooperation and support academic studies.



Tubettificio Perfektüp Social Charity Activity



Gabriella De Agostini, the HR Manager of Tubettificio Perfektüp, the Italian factory of our group company, is volunteering in the social aid project that involves traveling to Senegal twice a year to provide children with basic necessities such as clothing, shoes, pens, and notebooks.

Perfektüp also supported this meaningful project by collecting aid materials and facilitating the transport of containers to Senegal. We are delighted to share the journey of these donations from Perfektüp warehouses to the heart of the villages of Kibik and Takhoum. We extend our heartfelt thanks once again to everyone who contributed to the success of this initiative.

Success Story From Interkap Ambalaj

Mr. Ali Öztürk, who serves as a Production Supervisor at one of our group companies, Interkap Ambalaj, has successfully completed his thesis titled “Investigation of the Production of Thin-Walled Polypropylene Materials Using the In-Mold Labeling Method in Plastic Injection and Energy Analysis.” He graduated with a GPA of 3.73 from the Master’s Program in Mechanical Engineering at Isparta University of Applied Sciences.



We thank him in advance for the contributions his achievement will bring to the field and the value he will add to our group and the industry, and we wish him continued success.

Our HR Teams Came Together at the 2024 BPG HR Coordination Meeting

As in previous years, the Bell Packaging Group Human Resources Coordination Meeting brought together our HR teams this year as well. During the meeting, where ongoing projects, practices, and exciting new agenda topics were shared, Ms. Hande Şavata presented the Latest HR Trends. The interactive and dynamic coordination meeting, enriched with mutual exchanges, paved the way for preparations for new projects.



OUR CONDOLENCES

We are deeply saddened to share with you the loss of our Honorary Chairman, Mr. Guido Manzini, who played a pioneering role in the development of the plastic and aluminum packaging industries.

We share the pain of the Manzini family, and offer our condolences and patience to his grieving family and relatives.



**The Bell
Group of
Companies**