

Turkey: Market Insights 2018

From Monday, 8th to Tuesday, 9th October 2018 Swissenviro took part in a focus group consisting of a press delegation of different international environmental media outlets and agencies (i.a. from Finland, Macedonia, Romania) to explore the environmental policies and development in Turkey, as well as opportunities for foreign environmental technology providers organized by IFAT Eurasia in Ankara and Kocaeli.

- Turkey is doing efforts from top down to be more ecological
- Focus on improving waste management, carbon neutral energy supply and preservation of environment
- Alternative funding methods such as PPP and BOT are gaining importance
- Vast potential for Swiss and other technology providers for business with a developed country
- IFAT Eurasia is a good platform to network and identify suitable projects and customers

Meeting with REC Turkey/ Bölgesel Çevre Merkezi, Monday, 8th October, Ankara

The Regional Environmental Center for Central and Eastern Europe (REC) is an independent international organization that was established in 1990 and has a country office in Turkey since 2004. REC Turkey/ Bölgesel Çevre Merkezi provides a wide range of services and studies to topics of sustainability and environment.

Mr. Onur Akpulat, Project Manager REC Turkey, explained that Turkey produces 32 million tons of household waste and 7 million tons of packaging waste each year. 60% of all waste is being disposed in sanitized landfills, 30% lands in dumps and around 10% is being recycled.

The recycling of e-waste is a new focus point. Currently, the governmental authorities are working on creating a legislation on e-waste treatment.

The general lack of funds for waste treatment plants and other environmental projects leads to a search for alternative funding methods, such as PPP (Private Public Partnership) and BOT (Build Operate Transfer).



Pic.1: Meeting with REC Turkey/Bölgesel Çevre M.

Meeting with UCTEA – Chamber of Environmental Engineers, Monday, 8th October, Ankara

UCTEA was founded in 1992 and is counting 12'000 members. The association publishes an annual report on the state of the environmental development in Turkey.

Dr. Baran Bozođlu, Board Chairman, and Mrs. Ilkim Yiđit, Chairwoman of Branch Board, revealed that an own recent survey has found that 79% of surface water is polluted. Further, there are 1200 waste treatment facilities in Turkey, whereas only 700 of them are suitable. Also, the search for suitable investors is a key issue in the industry.

Meeting with Union of Municipalities of Turkey, Monday, 8th October, Ankara

Union of Municipalities of Turkey was established in 1945 as a public interest association. In 2002 it has reached the status of local administrative authority which holds a public entity possess, administrative and financial autonomy and in 2005 it has become a public legal entity, who is the representative of all of the municipalities.

In Turkey household waste separation is not common. Around 40% of household waste is biowaste and another 5% large waste. Carton or PET are being picked out from the dumpsters by informal waste pickers.

As per example all landfills in the greater area of Istanbul are full, new waste management systems are needed and this is why a new waste incineration plant is now being built in that area.

Municipalities are responsible for garbage collection, but in the opinion of the Union a separate collection of waste is time-consuming and very expensive. Here lies an opportunity for European and foreign companies to present their technical solutions in the range of waste logistics and recycling plants.



Fig.2: Meeting with Union of Municipalities of Turkey

Meeting with Deputy Minister of Environment Prof. Dr. Mehmet Emin Birpınar, Ministry of Environment and Urbanisation, Monday, 8th October, Ankara

The Ministry of Environment and Urbanisation of Turkey counts around 36'000 employees. Environmental issues are gaining more attention and importance on a political level in Turkey. Different approaches are being considered and tested on how to reduce air and water pollution, as well as improving the waste treatment.

One critical point was identified to be the view and categorization of the world community when it comes to Turkey. For instance, at international conferences a country such as Singapore is being categorized as developing country, whereas Turkey is being categorized as a developed country and therefore is not able to apply for more supporting funds than a developing country. The European Union is also

currently cutting around 200 million euros in subsidies for environmental protection in Turkey, which is critical, as air and water pollution will not stay in one place.

In 2017, First Lady Emine Erdoğan launched a Zero Waste Project aiming to promote recycling. The Prime Ministry and Parliament have already included various collection points for separate waste collection. Various schools and restaurants across the country are joining the campaign.



Pic.3: Separation container at the Ministry, Ankara

Energy supply and the preservation of environment are further political focus points. Around 8 billion euros are being invested to find alternative solutions for energy production (solar, wind, hydropower), as well as to create new parks, 3000km quite walkways and 3000km new cycle paths. Hence, the closed Atatürk Airport in Istanbul will be rebuilt into a park.



Pic.4: Visit at the Ministry of Environment and Urbanisation, Ankara

Visit of IZAYDAŞ (Izmit Waste and Residue Treatment Incineration and Volarization Inc. Co.), Tuesday, 9th October, Kocaeli/Izmit



Pic.5: IZAYDAŞ Headquarter, Kocaeli

On the second day of the explorative journey, a visit of the country's largest hazardous waste incinerator facility in the richest Turkish province Kocaeli, Izmit was organized. All the country's hazardous waste is being disposed in Kocaeli and processed by IZAYDAŞ.

IZAYDAŞ was established by the Metropolitan Municipality in 1996.

The purpose of establishment of IZAYDAŞ is to ensure the disposal of domestic and industrial waste in accordance with the environmental law.

Facilities and plants operated by IZAYDAŞ include a clinical and hazardous waste incineration and power generation facility, sanitary landfills, waste transportation services, LFG, methane gas power plant, interim waste storage facility, an IZAYDAŞ laboratory, waste reception vessels, sea surface vacuum cleaners and marine control and protection aircraft, medical waste sterilization facility, landfill leachate treatment and recycling facility, biogas integrated power generation facility and Yuvacık Dam channel type Hydroelectric Power Plant (HEPP).



Pic.6 & 7: Inside IZAYDAŞ Operator Control Room



In front of IZAYDAŞ Laboratory

General Manager Mr. Muhammet Saraç explained that IZAYDAŞ, as the first waste disposal facility in Turkey, ensures the disposal of wastes and produces power at the same time. With the solar power plant among other IZAYDAŞ power generation facilities it is possible to generate approximately 80 million kilowatt-hours of electricity per year and so, the domestic electricity need of a city with an average population of over 100,000 people is being supplied to the grid.



Pic.8: IZAYDAŞ Biogas Plant



Pic.9: IZAYDAŞ Wastewater Treatment Plant



Pic.10: IZAYDAŞ Grounds



Pic.11: IZAYDAŞ Sea Surface Vacuum Cleaners

Nevertheless, IZAYDAŞ's waste disposal site for household waste is slowly getting full too. According to General Manager Mr. Saraç new technical solutions are being explored and preliminary studies of environmental impact assessment (EIA) of a waste incineration plant are being conducted. Also, the equipment is regularly tested and parts are being replaced before they show signs of damage. For this, often high-quality products of foreign suppliers are being required.

IFAT Eurasia 2019

IFAT Eurasia will take place from March 28-30, 2019 in Istanbul, Turkey. After a successful second edition of the show in 2017 with around 11,326 trade visitors, 412 exhibitors, 6 country pavilions and an exhibition area of over 17,000 sqm, the trade fair will now again gather crucial industrial key actors in Istanbul and strengthen its role as an important networking and mediating trade platform between the West and the East.

For the third time, Swissenviro will organize a Swiss Pavilion at IFAT Eurasia and all Swiss companies, especially SME's, are warmly invited to join the Joint Swiss Booth and to explore the needs and demands of the Turkish environmental market on-site, as well as to meet and network with co-exhibiting colleagues and interesting professional visitors. As always, the Swiss Pavilion will provide its participants and their guests exclusive Swiss specialties such as chocolates, Swiss cheese, dry meat and wine, as well as coffee, tea and other treats during the exhibition days in Istanbul!

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