

Licensed Warehousing in Nizip and Pistachio



ANTEP FISTIĞINDA LİSANSLI DEPOCULUK ve NİZİP

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1. CURRENT SITUATION ANALYSIS

1.1. TURKEY PISTACHIO PRODUCTION

Turkey is the country that produces the most pistachios in the world after Iran and the USA.

WORLD PISTACHIO PRODUCTION AND SHARE (2017*)		
COUNTRIES	AMOUNT (MTS)	SHARE (%)
IRAN	574.987	51,57
USA	272.291	24,42
TÜRKİYE	78.000	7,00
CHINA**	95.294**	8,55
SYRIA	56.508	5,07
OTHERS	37.986	3,41
TOTAL	1.115.066	100

Source: FAO

* FAO data for 2018 has not been entered.

** Pistachio produced in China is a wild type and is not consumed as a nut.

Our country is located in the gene center of pistachio. It has a special position as it has a rich potential in terms of the amount of wild trees and is not too selective compared to other fruit species in terms of soil and climate requirements.

Pistachio is an important source of income for the businesses and the people of the region in terms of the economy of the Southeastern Anatolia Region, especially Gaziantep, and the future of this product, which has a strategic value, is important for the people of the region and our country. However, our country cannot fully utilize its current production potential.

TOTAL PISTACHIO PRODUCTION AREAS IN TURKEY		
Years	Production Areas (Decare)	Avarage Yield (Kg)
2009	2.144.897	2,71
2010	2.212.229	4,32
2011	2.338.368	3,63
2012	2.835.517	4,04
2013	2.813.553	2,32
2014	2.823.338	2,15
2015	2.914.179	3,51
2016	3.134.316	3,99



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2017	3.288.041	1,63
2018	3.545.003	4,84

Soruce: TUİK

Pistachio, whose gene center is in the Southeastern Anatolia Region and has been found to be grown in our region for approximately 7,000 years, is one of the most important brands of the region. Despite the fact that pistachio, in which 200 thousand people directly or indirectly earn their livelihood in the region and traded by more than 1000 companies, has the potential to produce more widely and increase its productivity, the desired level has not been reached at this point until now. In addition to this, increasing competition in world markets has led to a serious decrease in Turkey's share in foreign markets in pistachio exports.

In this direction, it is vital to take urgent steps towards the development of the sector in order to increase the income of 200 thousand people directly or indirectly employed in the sector and to provide more added value to the national economy, especially to the region.

The world's most delicious pistachios are produced in Gaziantep and its region, which has the ecological conditions necessary for the cultivation of pistachios. Iran, USA and Turkey take the first 3 places in world pistachio production, respectively. In Turkey, pistachio cultivation is mostly carried out in arid conditions. In addition, pistachios grown in Turkey are generally long varieties that are suitable for consumption without the shell, as they are usually intense and delicious, and are relatively difficult to sort out.

Pistachio in our country is available in Gaziantep, Şanlıurfa, Adıyaman, Kahramanmaraş and Siirt provinces and approximately 90% of our production is obtained from these provinces.

TURKEY'S PISTACHIO PRODUCTION BY YEARS	
Years	Production (Mt)
2009	81.795
2010	128.000
2011	112.000
2012	150.000
2013	88.600
2014	80.000
2015	144.000
2016	170.000
2017	78.000
2018	240.000

Source: TUİK

Considering the number of pistachio trees grown in our country, it is seen that while it was 40 million in 2010, it reached over 70 million in 2018.



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TOTAL NUMBER OF PISTACHIO TREE IN TURKEY	
Years	Total Tree
2009	41.605.601
2010	40.179.589
2011	41.287.986
2012	49.587.397
2013	50.122.390
2014	50.482.105
2015	52.230.400
2016	59.762.816
2017	67.225.782
2018	70.087.123

Source: TÜİK

Note: It is the sum of fruit bearing and non-fruiting trees.

1.2. PISTACHIO PRODUCTION AND PROCESSING CENTER NİZİP

90% of the pistachios grown in our country are found in Gaziantep, Şanlıurfa, Adıyaman, Kahramanmaraş and Siirt. Gaziantep province and its districts meet approximately 38% of the yield in Turkey alone. In addition, 52% of pistachios grown in Gaziantep region are grown in Nizip district (including Karkamış). Considering the annual yield data and the data of the Ministry of Agriculture, Nizip district (including Karkamış) alone meets about 47 thousand tons of the 90 thousand tons of harvest in the Gaziantep region in 2018. This situation has made Nizip district a Pistachio production, trade and export center.

NİZİP PISTACHIO PRODUCTION AREAS AND AVERAGE PRODUCTION BY YEARS		
Years	Production Area (Decare)	Average Yield (Kg)
2009	355.000	4,41
2010	358.000	3,99
2011	361.000	2,91
2012	497.642	4,49
2013	492.470	1,15
2014	489.867	1,56
2015	495.867	4,79



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2016	497.867	3,99
2017	504.867	0,81
2018	498.567	4,90

Kaynak: TÜİK

There are entrepreneurs, brokers and traders operating in this sector in our district, including 650 residents and approximately 1000 people working together. Approximately 30% of the population of the district lives on the income they get from the pistachio trade. From an economic point of view, the pistachio trade is the lifeblood of the district's economy.

In addition to the crop produced only in Nizip district, tons of peanuts coming from the surrounding provinces and districts are processed in the pistachio processing facilities in the district and then distributed all over Turkey. Nizip district, which directs the pistachio market, has also become a raw pistachio processing center.

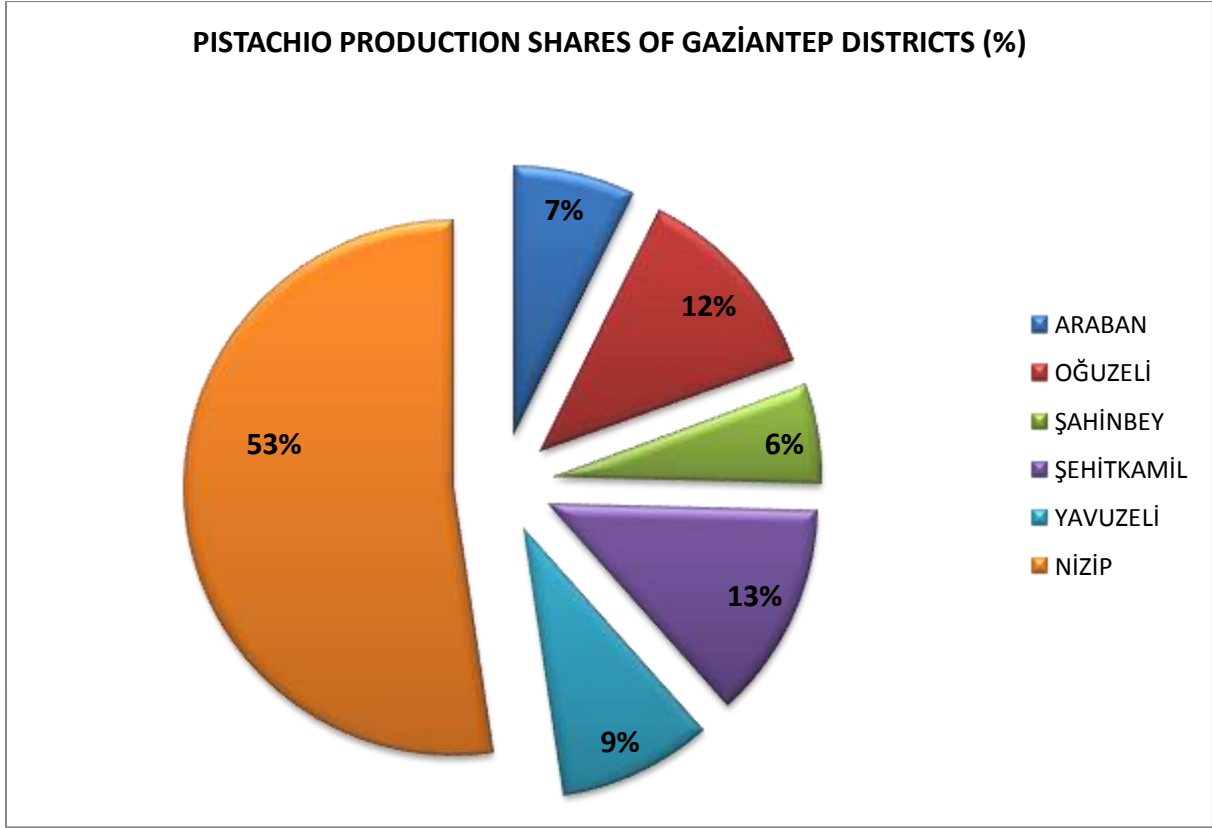
GAZİANTEP DISTRICTS PISTACHIO PRODUCTION AND NUMBER OF TREE DATA				
DISTRICTS	PRODUCTION AREA (DECARE)	NUMBER OF TREE	PRODUCTION (MT)	AVG. YIELD PER TREE (KG)
NİZİP	498.567	9.120.964	37.441	4,9
ŞAHİNBEY	53.251	1.105.861	5.321	6,1
ŞEHİTKAMİL	228.488	3.209.203	11.722	5,1
ARABAN	111.244	1.915.073	6.569	4,5
İSLÂHİYE	1.086	21.202	38	2,5
KARKAMIŞ	170.298	2.990.480	9.753	4,6
NURDAĞI	512	10.634	12	2,5
OĞUZELİ	146.153	2.659.789	11.001	5,1
YAVUZELİ	150.836	2.160.045	8.326	5,7

Source: TÜİK 2018

When viewed on the basis of districts; It is clearly seen that Nizip district is in the first place in peanut production. With the inclusion of Karkamış within the borders of Nizip, it is seen that the total production in 2018 reached around 47 thousand tons, which shows that approximately 53% of the pistachio produced within the borders of Gaziantep is produced within the borders of our district.



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TOTAL NUMBER OF TREES IN NİZİP BY YEARS	
YEARS	TOTAL NUMBER OF TREE
2009	4.397.900
2010	4.427.900
2011	4.482.900
2012	8.813.720
2013	8.813.720
2014	8.839.940
2015	8.942.890
2016	8.983.890
2017	9.123.890
2018	9.120.964

Source: TÜİK

Note: It is the sum of fruit bearing and non-fruiting trees.



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PISTACHIO PRODUCTON IN NIZIP BY YEARS	
YEARS	PRODUCTION (MT)
2009	15.659
2010	14.312
2011	10.536
2012	22.359
2013	5.686
2014	7.654
2015	23.796
2016	32.772
2017	6.031
2018	37.441

Source: TUIK

2. LICENSED WAREHOUSING AND NİZİP

2.1. WHY IS IT IMPORTANT?

We can examine the benefits of licensed warehousing in five main groups:

Benefits for producers;

- Insured, safe and most importantly healthy storage facility where harvested products can be stored.
- Opportunity to get credit with the product certificates obtained by putting the license in warehouses instead of selling the products at low prices during the harvest period.
- Opportunity to demand a price according to the quality values by determining the standards of the produced product by the accredited laboratory
- It can be listed as minimizing the logistics cost and the opportunity to trade in the national area, not regionally, with the product bills obtained.

The benefits for industrialists and traders are;

- Opportunity for the industrialist to focus on their main business by avoiding the cost of building a warehouse
- Opportunity to reliably supply the requested quality, quantity and type of product in a short time
- Opportunity to get rid of constantly changing market price differences with the product cents they have



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- It can be listed as the possibility of minimizing logistics costs.

The benefits of licensed warehousing in terms of product exchanges are;

- Increase in registration revenues due to trading of product bills
- Contribution to real price formation by bringing together buyers and sellers in a wider range.
- Returning to the real functions of exchanges and providing a modern structure through electronic commerce.

Benefits of licensed warehousing for the state;

- With the Product Exchanges Development Project and the Licensed Warehousing system implemented in parallel with the restructuring in agriculture being implemented in our country, the private sector will take an active role in product marketing and safe warehouses will be created where producers can deliver their products.
- The need for warehouses in the market will be met, as organizations such as TMO move away from making purchases on behalf of the state.
- For some products, the purchasing and stocking costs on the government will be reduced.
- More precise statistical information about the amount and quality of agricultural production in our country will be provided and agricultural policies can be directed.
- Agricultural product trade will be recorded.
- Since the products whose quality is determined by the standards are more valuable, quality production will be encouraged.
- New business areas will be created in the banking and insurance sector, thus contributing to employment.

Other benefits of licensed warehousing are;

- A new investment tool will be provided as an alternative to investment instruments such as foreign currency, gold and stocks for investors through product stocks.
- A great potential will be provided in electronic commerce.
- Facilitation will be provided in product marketing and distribution through branches to be opened in Turkey and abroad by licensed warehouses.
- Thanks to licensed warehousing, it will be possible to make real yield estimations for agricultural products.



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2.2. BENEFITS OF LICENSED STORAGE IN PISTACHIO FOR THE FUTURE OF THE INDUSTRY

Establishment of licensed warehouses for pistachio, which has a great place in the regional economy, will be of great benefit. Pistachio is one of the most suitable products for licensed warehousing, with a storage life of up to 2 years. Licensed warehousing is of great importance in terms of increasing quality and ensuring price stability.

With the establishment of licensed warehouses, significant progress will be made in terms of quality, hygiene and food safety. In addition, a significant advantage will be provided in terms of storage costs.

With licensed warehousing, the rate of wastage and scrap will also decrease, and marketing and export capabilities will be increased by providing high standards of storage and classification. In addition to these, product bills in the Licensed Warehousing system; It will also make significant financial contributions to the region, as it is a collateral that can provide loans to producers, exporters and traders of these products.

By putting the pistachio licensed warehousing into service in the region, the risk of storage under inappropriate conditions and aflatoxin formation will be prevented, the problems related to aflatoxin in export will be eliminated and the added value of the product will be increased.

The high initial investment cost of licensed warehousing and the low profit rates are among the reservations regarding investments to be made in this field. For this reason, it is critical that non-profit institutions and organizations lead the steps to be taken in the field of licensed warehousing.

After the licensed warehousing becomes operational, the pistachio product specialty exchange, which is planned to be established in the region in the future, will enable the product to be marketed more easily in the country and abroad.

In addition, when we look at the export figures mentioned above, although our country is the third largest producer in the world; It is the 12th exporter in the world. The activation of the licensed warehousing, which is planned to be established, will increase the possibility of opening the product to the world market, thus contributing to the country's exports.



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1.1. THE IMPORTANCE OF ESTABLISHING THE LICENSED WAREHOUSE IN NİZİP

Looking at the 2018 data in the Gaziantep region, Nizip district alone meets 37 thousand tons of the 90 thousand tons of harvest. From an economic point of view, this situation has made Nizip district a center for Pistachio production, trade and export. Licensed Depoculuk A.Ş., which is under the Soil Products Office (TMO) for Pistachios. The establishment of a licensed warehouse in Nizip by LİDAŞ is of great importance for the economy of our district and the region. Establishment of licensed warehousing provides important opportunities for the future of the sector for the district of Nizip, which has fertile lands as well as qualified workforce in this field.

In the meeting on Product Specialization Exchange and Licensed Warehousing, which was held in October 2017 under the chairmanship of İsmail Yücel, Deputy Undersecretary of the Ministry of Customs and Trade and with the participation of 33 Commodity Exchange Board Presidents who are partners in the product specialization exchange, the point reached in the relevant subject and the action plan were discussed, and the product specialization exchange was held in October 2017. important decisions have been taken regarding the stock markets. In line with these decisions, it was envisaged that a product specialized exchange should be established within TOBB and that commodity exchanges that actively trade agricultural products would take part as partners in order to carry out licensed warehousing activities in an effective, efficient and sustainable manner. The active role of Nizip Commodity Exchange in this structure is an important opportunity for pistachio and the regional economy.

Making large investments in our region only in Gaziantep has a negative impact on the development of the surrounding districts and this situation causes industrialist migration from Nizip district, which draws attention with its developing industry, to Gaziantep. Making a big and important investment such as licensed warehousing in Nizip district will be an incentive for our industrialists to make investments that will create employment in our district. In addition, with the increase in employment opportunities, qualified human migration from our district to other provinces will be prevented and contribution to the employment targets set by our state will be provided.

With the launch of a licensed warehousing service in the Nizip district, which is located on the historical Silk Road and has important advantages in terms of ease of transportation, the pistachio produced in the surrounding districts such as Birecik and Halfeti will also come to our district for processing and storage. Thus, licensed warehousing will not only serve the producers of Nizip but also the producers of our region.



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It would be beneficial to establish a licensed warehouse on the new land allocated in Nizip district for the Turkish Grain Board (TMO), which is planned to be closed due to the establishment of specialized commodity exchanges. Since individuals operating in the private sector in our district do not have enough opportunities, it would be appropriate to establish the licensed warehousing service by our Ministry of Agriculture.

The licensed warehousing system, which shows itself as an important argument in the world agricultural product marketing, is successfully applied in many agricultural countries of the world today. For this reason, the application of licensed warehousing, which has just begun to develop in our country, especially in Nizip district, which is the production center of pistachio, will provide numerous benefits to both our producers and our businesses.

License warehouse, which is planned to be established in our region, will turn our region, in general, and our country into a pistachio trade center. Therefore, it is important to carry out licensed warehousing activities for Pistachio in our district, which is the closest to the production area.

2. PROBLEMS IN THE SECTOR

2.1. STORAGE AND AFLATOXIN IN SUCH CONDITIONS

Aflatoxin is a toxic substance known to have carcinogenic effects on humans and causes liver cancer in animals. In Africa and Asia, where peanuts are the main food source, a possible close association between people with liver cancer and aflatoxin is considered. Another recent study shows that the hepatitis B virus (a viral infectious disease of the liver) and long-term aflatoxin-containing foods together increase the risk of liver cancer.

It is known that the quality of pistachios deteriorates when stored in unsuitable ambient conditions from production to consumption. Molds multiply in raw and unprocessed materials under suitable conditions (appropriate humidity and temperature), on the one hand they change the quality and quantity of the product and cause it to deteriorate, on the other hand, they form toxic substances that have negative effects on human health. Mycotoxins in the human body directly affect the liver, accumulate in the liver and cause cancer.

Post-harvest processes are the most critical stages in the development of aflatoxin. The products harvested at sufficient maturity should be presented to consumption by going through a good drying, storage, processing and post-processing stages. Since there is no storage area in accordance with the standards in the town of Nizip, which is the production center of pistachio, unfortunately, the crops obtained are kept in makeshift warehouses,



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warehouses or basements of houses created by the producers themselves. Aflatoxins occur in pistachios over time, which are stored in humid environments that do not have adequate ventilation and cooling systems.

2.2. STOCKING AND PRICE INSTABILITY IN PISTACHIO

Due to their low capital accumulation, agricultural enterprises in Turkey avoid the cost of transporting their products to places where trading is intense and prefer to sell them at the production site.

In our district, which meets about 15% of the annual yield in our country, the producers store their products in warehouses at their homes and/or workplaces under inappropriate conditions or because many producers do not have sufficient physical conditions for storage, they have to sell their products to traders. Products sold to traders are stored by making stock in order to raise prices deliberately. Many jewelers, contractors and people from different professions who think that pistachios will bring money, buy peanuts from the market and store them in their warehouses or in different areas.

On the other hand, manufacturers often send their products to traders with an official document, invoice, etc. It sells without any storage or gives it to stockists because there is no place to store the product. Since the credit and payable records kept only in the books are not officially binding, producers cannot seek their rights and suffer when they cannot receive their payments. In a possible bankruptcy of the merchant, the producers suffer the most. According to a recent news on this subject, which also appeared in the national press, a merchant from Nizip defrauded the producers by promising to give more dividends and disappeared with approximately 700 million TL collected from 235 people. Unfortunately, fraudulent events like this happen from time to time and hit the pistachio market hard. Fraud incidents in the sector also cause high tax losses for our government.

One of the important problems of the sector is the balance of quality and price in relation to price stability. Especially international customers want to get a price one year in advance and demand to make their plans/agreements based on this price. Our exporters cannot give these prices. The fact that an up-to-date standard compatible with the realities of the industry for pistachio has not gained popularity in terms of awareness and application, and that the products cannot be priced according to this determined standard, are among the most important reasons for the lack of price stability.

The existence of people outside the sector, who buy pistachios for investment purposes only and store them in uncontrolled conditions and aim to make a profit by selling the product when prices rise, is another reason why price stability cannot be achieved. In order to



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overcome this problem, all products produced should be categorized and the price should be determined, and sales should be made by storing the product in licensed warehouses in certain main centers on behalf of the manufacturer. In time, this will allow for early yield forecasts and early pricing.

2.3. ILLEGAL ECONOMY IN PISTACHIO

Due to their low capital accumulation, agricultural enterprises in Turkey avoid the cost of transporting their products to places where trading is intense and prefer to sell them at the production site. On the other hand, in our country, which is developing and constantly fighting against the informal economy, the licensed warehousing system becomes more important in recording the purchase and sale of agricultural products and in continuous monitoring.

The informal economy has numerous negative aspects to the State and its commercial life, and therefore to individuals. Informal economy adversely affects the planning of the State on economic data and causes a decrease in tax revenues.

2.4. INSUFFICIENT EXPORT NUMBERS

Iran and the USA production is carried out in irrigated conditions on the plains, on large lands, by planting trees per unit area and it gets high yields per decare. In Turkey, pistachio cultivation is mostly carried out in arid conditions. In addition, pistachios grown in Turkey are generally long varieties that are suitable for consumption without shell, since their aroma is intense and delicious, and it is relatively difficult to sort. The products of Iran and the USA are more productive but weak in taste, large and round varieties with high cracking rate.

North America and the Middle East come first in the production of Pistachio, as in a significant part of the nuts produced in the world. Approximately 85% of Pistachio production, which is around 1 million tons per year, is carried out by Iran, the USA and Turkey.

When Turkey's contribution to production and its share in exports are compared, it is seen that there is a serious gap between them. Pistachio export from Gaziantep and its region,

It constitutes a very large part of Turkey's exports. Only Gaziantep's exports account for approximately 90% of the region's total exports.



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WORLD PISTACHIO EXPORTS (1000 \$)					
	COUNTRY	2014	2015	2016	SHARE (%)
1	IRAN	993.148	772.660	727.003	26,90
2	USA	993.108	755.749	1074.472	39,76
3	HONG KONG	361.145	264.862	393.046	14,54
4	GERMANY	161.736	159.076	187.329	6,93
5	HOLLAND	98.659	95.186	114.585	4,24
6	BELGIUM	45.381	74.272	82.891	3,07
7	TÜRKİYE	19.925	51.341	66.757	2,47
8	AFGHANISTAN	42.007	28.777	12.999	0,49
9	LUKSEMBURG	11.508	23.705	13.244	0,49
10	GREECE	15.571	17.948	30.011	1,11

Source: Trademap

Turkey exported only 2327 tons of the 150 thousand tons of pistachios it produced in 2012. Similarly, 3984 tons of approximately 89 thousand pistachios produced in 2013 were exported. These figures show that 2% and 4% of the product produced in 2012 and 2013, respectively, was exported. In 2015, only 2% of the production was exported.

Pistachio Production and Export Quantities of the Top Three Producer Countries as of the End of 2015									
Emporster	2012 Üretim Ton	2012 İhracat Miktarı Ton	İhraç Edilen %	2013 Üretim Ton	2013 İhracat Miktarı Ton	İhraç Edilen %	2015 Üretim Ton	2015 İhracat Miktarı Ton	İhraç Edilen %
İran	472.097	121.000	%26	478.600	135.000	%28	480.000	99.765	%21
ABD	249.930	141.030	%56	196.930	136.879	%70	240.000	82.922	%35
Türkiye	150.000	2.327	%2	88.600	3.948	%4	144.000	3.154	%2

Kaynak: Trademap

Especially the formation of aflatoxins and price instability are among the problems experienced in exports. Since there is no price regulating system in the market, prices are constantly changing as a result of speculation, and our exporters have difficulties in supplying products to companies they contact abroad at an agreed price. The launch of licensed warehousing services in the pistachio sector will greatly benefit our exporting companies, especially in price stability and continuous product supply, and our country's pistachio export will be in the place it deserves in the world ranking.



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3. PISTACHIO FOOD SPECIALIZED ORGANIZED INDUSTRIAL ZONE

Nizip district, which is a candidate to be the locomotive of the regional economy with its fertile lands, developed industry and trained young population, has the most advantageous position in establishing an Agricultural Food Specialized Organized Industrial Zone.

Specialized Agricultural Organized Industrial Zones are the regions where clustering activity will be best applied. The Specialized Organized Industrial Zone based on Agriculture, where scientific methods that can create high added value and employment are intensively used, is of great importance for the future of our region.

The concept of clustering, which is the driving force in the development of developed countries, should be implemented by our relevant chambers, stock exchanges, industrialists and decision makers without delay.

In addition, tons of waste generated every year in pistachio processing facilities operating in various regions in Nizip district poses a great threat to environmental cleanliness and health due to inadequate treatment conditions. The scattered settlement of the enterprises made the establishment of a common treatment plant impossible. With the establishment of the organized industrial zone, clustering of our enterprises was ensured, a common treatment plant was established for the facilities, and thus a large environmental awareness project will be signed.