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POLICY FRAMEWORK ON SINGLE-USE PLASTICS IN TÜRKİYE

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Plastic pollution has evolved beyond a conventional waste management issue that can be addressed solely through disposal capacity. It has become a multi-layered governance challenge closely linked to production and consumption patterns, resource efficiency, marine ecosystems, public health, municipal costs, and circular economic policies. Global plastic production increased from 234 million tons in 2000 to approximately 460 million tons in 2026.[1] Plastic waste generation rose at a similar rate over the same period.[2] Only about 9% of this waste has been effectively recycled, while a substantial share has been incinerated, buried in landfills, or leaked into the environment.[3] In 2019 alone, an estimated 22 million tons of plastic materials leaked into the environment, much of it due to inadequate collection and waste management systems.[4, 5]

In this context, the core structural problem of plastic pollution lies in the fact that current systems attempt to intervene only after waste has already been generated.[6] Particularly for short-lived plastic products with low economic value that are widely dispersed and prone to contamination, the problem does not arise at the waste stage but rather begins at the stages of product design and market placement. Consequently, the emerging policy approach focuses not only on expanding recycling capacity but also on establishing systemic interventions through prevention, reduction, reuse, refill systems, extended producer responsibility, and product design requirements. Addressing the issue therefore requires coordinated action by governments, businesses, NGOs, academia, and consumers to limit the production and consumption of single-use plastics.

Single-use plastics represent one of the most visible and policy-relevant components of plastic pollution. These products typically remain in use for only a few minutes or hours, yet they persist in the environment for hundreds of years. Their low economic value in waste management systems and their high likelihood of being discarded improperly—particularly in public spaces, coastal areas, tourism destinations, and the service sector—make them especially problematic. Single-use plastics account for approximately 40% of global plastic production.[7] They constitute around half of plastic marine litter.[8] Because the recycling of single-use plastics is often technically and economically challenging, policies that restrict or phase out these products should not be viewed merely as product bans. Rather, they represent a strategy to reduce low-value, high-leakage waste streams at their source. By preventing these materials from entering the waste stream, such measures can alleviate pressure on municipal waste collection and cleaning systems, reduce dispersed litter, limit problematic materials entering recycling streams, and create opportunities for reuse-based economic models. In this sense, regulations targeting single-use plastics can be understood not as end-of-pipe waste management measures but as preventive environmental policy tools aimed at reducing waste generation at its origin.

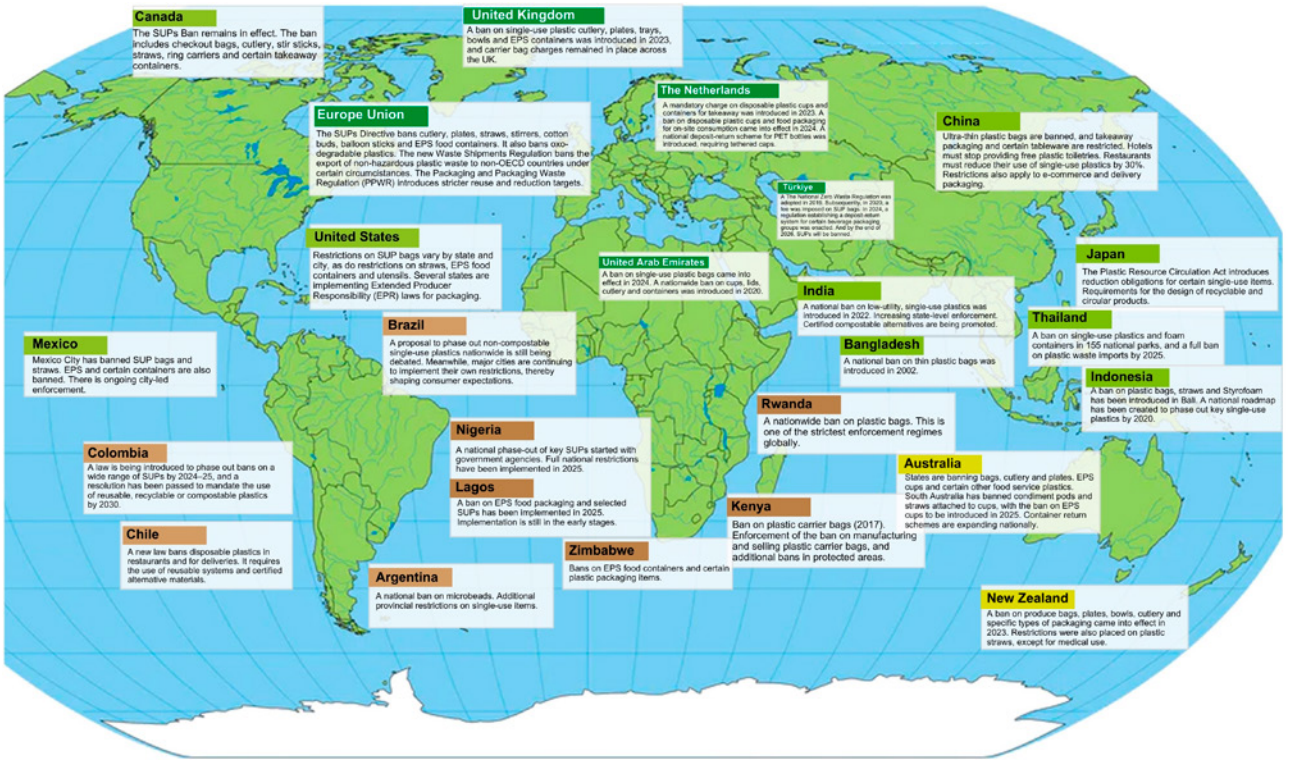
The global trend in the management of single-use plastics is clearly moving toward stricter regulatory frameworks. An increasing number of countries are now implementing policies that extend beyond plastic bag bans to include restrictions, bans, levies, and reuse obligations targeting items such as straws, cutlery, plates, stirrers, polystyrene food containers, flatware, and certain packaging formats (see Figure 1).[9] While regulatory approaches vary across regions, the dominant policy direction combines product bans, consumption reduction targets, deposit-return systems, and extended producer responsibility schemes. In 2025, new restrictions on single-use

plastics, alongside measures promoting reuse and packaging reduction, accelerated in many jurisdictions.[10]

As seen in Figure 1, several common global policy patterns can be observed. First, national regulations typically begin by targeting lightweight plastic bags, straws, single-use cutlery, plates, and expanded polystyrene (EPS) food containers. Second, policy attention increasingly shifts toward the food service and takeaway sectors—often referred to as the hotels, restaurants, and cafeterias (HORECA) sector—where reuse and refill systems are introduced. Third, more comprehensive regulatory instruments are implemented, including Extended Producer Responsibility (EPR) schemes, product design, and data reporting and monitoring systems.

Across global policy examples, countries such as China, India, Canada, and Mexico have adopted different combinations of this phased regulatory approach. In contrast, in countries including the Netherlands, the United Kingdom, Canada, Colombia, Chile, New Zealand, and several Asian nations, policies increasingly emphasize reuse systems and packaging reduction.[11] Although a binding global plastics treaty has not yet been finalized, many countries have continued to implement domestic measures to restrict single-use plastics. This suggests that the regulation of single-use plastics is no longer a policy area waiting for the outcome of international negotiations but rather one that is rapidly evolving at the national level. A similar trend can also be observed in Türkiye.

Figure 1. Global Overview of Single-Use Plastic Regulations and Policy Instruments



Source: Author's own image based on data from UKHI (2026) and Solinatra (2025).

In Türkiye, the policy framework addressing single-use plastics has undergone a notable transformation in recent years. The process began with the Zero Waste Regulation in 2019,[12] followed by the introduction of a plastic bag levy[13] and the deposit-return system regulation.[14] In 2025, the Roadmap for Single-Use Plastics, Marine Litter, and Microplastics, published by the Ministry of Environment, Urbanization and Climate Change, established a more structured policy framework with short-, medium-, and long-term objectives.[15] In the short term, the roadmap foresees the preparation of specific legislation on single-use plastics, restrictions or bans on certain products, consumption reduction measures for food packaging and beverage containers, fee-based Extended Producer Responsibility (EPR) schemes covering waste management costs, product design requirements for beverage containers and bottles, prioritization of sustainable and reusable alternatives in the HORECA and tourism sectors, and the establishment of a digital data infrastructure for tracking production, consumption, waste generation, imports, and exports.

Since many environmental regulations in Türkiye are developed through harmonization with the EU *acquis*, examining the EU's policy framework on single-use plastics provides useful context. The EU has established a comprehensive regulatory structure through Directive (EU) 2019/904 on the reduction of the impact of certain plastic products on the environment.[16] This framework extends beyond simple product bans and integrates multiple policy instruments, including consumption reduction measures, product design requirements, labeling obligations, extended producer responsibility, separate collection targets, and reporting mechanisms. The directive aims to prevent and reduce the environmental impacts of specific plastic products—particularly on aquatic ecosystems and human health—while promoting the transition to a circular economy. It covers single-use plastic products and oxo-degradable plastics, defining single-use items as products not designed to accomplish multiple trips or rotations by being returned to a producer for refill or reused for the same purpose for which they were conceived. One of the strengths of the EU framework lies in translating normative policy goals into operational regulatory instruments. The system includes consumption reduction measures, product design requirements such as tethered caps on beverage containers, consumer labeling provisions, obligations for producers to contribute to waste management and clean-up costs, and targets for separate collection and recycled content in beverage bottles. The directive sets separate collection targets of 77% for plastic beverage bottles by 2025 and 90% by 2029, alongside recycled content requirements of 25% in PET bottles by 2025 and 30% in all plastic beverage bottles by 2030. It also establishes measurable reduction targets for food containers and beverage cups by 2026 compared to 2022 levels.[17] The key lesson from the EU experience is that effective regulation of single-use plastics must go beyond bans and be built upon a combination of measurable reduction targets, EPR, product design standards, separate collection systems, data reporting, and reuse mechanisms. This integrated approach reflects a comprehensive and effective model for plastic waste governance.

Building on a similar policy rationale, Türkiye's Ministry of Environment, Urbanization, and Climate Change has announced a draft regulation addressing single-use plastics, which represent a significant component of plastic pollution in Türkiye.[18] The draft regulation aims to prevent and reduce the environmental impacts of certain single-use plastic products within the framework

Table 1. Comparison of the EU Directive and the Draft Turkish Regulation

Metric / Regulation Area	EU Directive 2019/904	Draft Regulation for Türkiye	Differences and Critical Notes
Market Ban	Yes (as of July 2021)	Yes (as of September 1, 2026)	The Turkish draft prohibits a product list that is similar to the EU's (straws, cutlery, EPS containers, etc.).
Measurable Consumption Reduction	Yes (Quantitative decrease by 2026 compared to the 2022 base year)	No (Only the principle of "reduction is essential")	The Turkish draft does not include a binding base year or percentage-based reduction target.
Extended Producer Responsibility (EPR)	Yes (Includes financial and operational; cleaning and waste costs)	Limited (Only focused on signage and awareness)	While in the EU manufacturers also bear the costs of environmental cleanup and public collection, the Turkish draft does not yet include this financial dimension.
Separate Collection Targets	Yes (77% in 2025, 90% in 2029)	Not in draft (Included as a target in the Roadmap[13])	While the draft text does not include mandatory separate collection rates, higher-level policy documents (Roadmap) point to the same targets as the EU.
Product Design (Attached Cap)	Yes (as of July 3, 2024)	Yes (as of January 1, 2027)	In both regulations, it is mandatory for lids to remain attached to the body of containers up to 3 liters.
Recycled Content	Yes (25% in 2025, 30% in 2030 for PET bottles)	Not in draft (Included in strategy documents)	Unlike EU regulations, the percentage of recycled plastic required for production is not yet included in the Turkish draft, which is positive due to the risks posed by recycled plastics.
Labeling Requirements	Yes (Pads, wet wipes, tobacco, cups)	Yes (as of January 1, 2027)	Visual labeling on products stating "Contains Plastic" is present in both regulations.
Annual Data Reporting	Yes (Mandatory and annual)	No (Infrastructure is planned to be established)	While the EU reports market supply and separate collection data annually, in Turkey this is a part of the digital infrastructure roadmap.
Production Restriction	No (Focus is on market supply)	No (Focus is on market supply)	Both texts enforce regulations on the "market supply" rather than production restrictions. Adding a "production restriction for domestic market supply" to the Turkish draft will make the proposal more effective.

of the Zero Waste vision while contributing to the transition toward a circular economy. Its scope covers a wide range of products, including oxo-degradable plastics, beverage cups, beverage bottles and containers, food containers, plates, straws, cutlery, stirrers, certain EPS products, cotton bud sticks, sanitary pads and tampons, wet wipes, balloon sticks, tobacco products with filters, and plastic carrier bags used in cargo and delivery services.

Under the draft regulation, as of September 1, 2026, oxo-degradable plastic products, as well as plastic cutlery (forks, knives, spoons, and chopsticks), plates, certain food and beverage containers made from expanded polystyrene (EPS), fully plastic beverage cups, beverage stirrers, certain fully plastic food containers, some cotton bud sticks, straws, and balloon sticks will no longer be permitted to be placed on the market.

The same provision explicitly states that products made from biodegradable, compostable, or recycled plastics are also included within the scope of the ban.

Another provision establishes the principle of sustainable and permanent reduction in consumption for partially plastic beverage cups, partially plastic food containers, cargo bags, wet wipes, and wet surface-cleaning cloths. Within the HORECA sector, businesses are expected to prioritize reusable beverage cups and food containers, give preference to multi-use options for on-site consumption rather than takeaway packaging, allow customers to use their own thermos bottles or cups, and provide wet wipes only upon request. In addition, as of January 1, 2027, single-use plastic beverage containers of up to three liters with plastic caps may only be placed on the market if the caps remain attached to the container during the product's intended use.

One of the main strengths of the draft regulation is that it introduces, for the first time in Türkiye, a standalone and systematic regulatory framework specifically addressing single-use plastics. The regulation demonstrates a clear normative structure in terms of its objectives, scope, and list of banned products. The explicit inclusion of oxo-degradable plastics, the prohibition of certain EPS-based products, and the clarification that claims "biodegradable" or "compostable" materials do not automatically exempt products from the ban represent environmentally sound policy choices. Similarly, the requirement for tethered caps reflects a contemporary regulatory approach that intervenes directly at the level of product design. A second positive aspect is the inclusion of non-quantitative reduction measures targeting the HORECA sector. Although these provisions currently remain largely principle-based, prioritizing reusable alternatives and allowing customers to use their own containers indicates that the regulation acknowledges behavioral and operational transition mechanisms rather than relying solely on product bans. A third strength lies in the overall policy coherence between the draft regulation and the national roadmap on plastics, suggesting that the draft should be understood not as an isolated legal instrument but as part of a broader framework for plastic governance.

The most significant shortcoming of the draft regulation is the absence of quantitative reduction targets. Article 6 establishes the principle of reducing consumption but does not define a baseline year, specific reduction rates, sectoral obligations, monitoring indicators, or reporting mechanisms. As a result, the provision functions more as a general policy direction than as an enforceable standard capable of producing measurable outcomes in practice. In this context, introducing phased targets for the HORECA sector—such as requiring reuse and refill systems in 25% of establishments by the end of 2026, 50% by the end of 2027, and 100% by the end of 2028—would transform the regulation into a measurable and outcome-oriented policy instrument. Such targets would significantly strengthen the implementation potential of the consumption reduction provision.

A second limitation concerns the absence of explicit regulations for production. When the reduction of consumption and restrictions on market placement are addressed without reference to production, the framework may give the impression that production will continue unchanged while only consumption is expected to decline. Explicitly incorporating reductions in production intended for the domestic market would both clarify the policy objective and reduce potential enforcement gaps. This aspect is particularly important for minimizing the risk of regulatory leakage.

A third shortcoming is that the Extended Producer Responsibility (EPR) framework is not sufficiently operationalized in the draft regulation. Although the national roadmap explicitly refers to fee-based EPR schemes, the draft text does not yet establish a clear financial and operational responsibility chain for producers covering waste collection, environmental clean-up, data reporting, environmental compensation, or the financing of reuse systems. Without such provisions, the economic burden of plastic waste management may continue to fall disproportionately on municipalities, businesses, and consumers.

A fourth issue concerns gaps in the scope of regulated products. Certain widely used items—such as EPS catering trays, fully plastic (including EPS) food containers used in secondary packaging and polystyrene stretch films—remain outside the scope of the regulation, potentially limiting its environmental effectiveness. In the retail and service sectors, these formats are commonly used for packaging meat, dairy products, pastries, and ready-to-eat foods, and they represent a significant share of plastic waste streams. Expanding the scope of the regulation to better reflect real-world product use would therefore strengthen its environmental impact. Similarly, explicitly addressing plastic-lined paper cups and containers would help reduce consumer misconceptions that such products are “plastic-free.”

The fifth limitation relates to the lack of a clearly defined data collection, monitoring, and reporting infrastructure within the draft regulation. The national roadmap foresees the establishment of a digital data system to track production, consumption, waste generation, imports, and exports of plastic products. However, the binding mechanisms required to operationalize this system are not yet clearly reflected in the draft. Without reliable and transparent data, it will be difficult to effectively measure reduction targets, implement EPR contribution schemes, evaluate HORECA sector performance, or ensure effective market oversight.

The draft regulation presents a significant opportunity for systemic transformation if strengthened through appropriate revisions. Currently, several potential benefits can be identified in the draft regulation.

1 | First, by prioritizing prevention at the source, the regulation could reduce the burden on municipal waste collection and cleaning services.

2 | Second, it could stimulate new market opportunities for business models based on reuse, refill systems, deposit-return schemes, and related logistics and cleaning infrastructures.

3 | Third, by promoting higher environmental standards within the HORECA and tourism sectors, the regulation could contribute to positioning Türkiye—particularly its coastal tourism destinations—in closer alignment with zero-waste policies and environmentally responsible service practices.

4 | Finally, if supported by a strong framework for producer responsibility and data-based monitoring, the regulation could enhance market oversight and function not merely as a symbolic legal instrument but as a regulatory tool capable of shaping economic behavior.

Many of these opportunities are already outlined in the national roadmap. However, if the draft remains unchanged, several risks may arise. The first risk concerns limited policy effectiveness: without quantitative targets, consumption reduction provisions may remain largely advisory in practice. The second risk relates to delayed sectoral adaptation; without a clear transition timeline, particularly for the HORECA, takeaway,

and cargo sectors, businesses may postpone the adoption of alternative systems. The third risk is the persistence of public financial burdens: if Extended Producer Responsibility mechanisms are not sufficiently strengthened, the costs of waste management and environmental clean-up will continue to fall primarily on municipalities and society at large. A further technical risk is that products excluded from the regulatory scope may rapidly expand through substitution effects, thereby undermining the environmental objectives of the regulation. This risk is particularly evident in products marketed as "paper-based" but lined with plastic materials.

To strengthen the environmental effectiveness of the draft regulation, several key revisions should be adopted:

1 | Introduce quantitative reduction targets in Article 6. At minimum, the regulation should establish a phased transition toward reuse and refill systems in the HORECA sector, covering 25% of establishments by the end of 2026, 50% by the end of 2027, and 100% by the end of 2028. These targets should be supported by annual reporting requirements.

2 | Expand the wording of the consumption reduction provision. The phrase "the reduction of consumption" should be broadened to "the reduction of production for placement on the domestic market and reduction of consumption." This modification would strengthen the preventive character of the regulation.

3 | Introduce or strengthen Extended Producer Responsibility (EPR) provisions. Producers should be required to finance key elements of the system, including separate collection, transportation, processing, environmental clean-up, data reporting, consumer awareness activities, and the establishment of reuse systems.

4 | Environmental contribution fees paid by producers should be differentiated according to the environmental performance of products (eco-modulation). Reusable, refillable, environmentally preferable, and less toxic products should face lower fees, while products with higher environmental risks should bear higher financial responsibility. This proposal aligns with both the EU approach and the fee-based EPR schemes outlined in the national roadmap.

5 | Explicitly establish deposit-return and reuse systems for the HORECA sector. The regulation should require that reusable, non-plastic beverage cups and food containers be offered as the default option to consumers, supported by a mandatory deposit-return system. Such provisions would transform the regulation from one that merely calls for reduction into one that clearly defines how reduction will be achieved.

6 | Expand the scope of regulated products. Additional restrictions should be considered for items frequently used in secondary food packaging, including EPS/PET/PE/PP containers, polystyrene stretch films, EPS catering trays, food packaging containers, and other problematic small-volume packaging formats. Production restrictions should also be considered for plastic beverage containers smaller than 500 ml and plastic-lined paper cups smaller than 7 oz.

7 | Establish a binding data infrastructure within the regulation. Producers, importers, and major users should be required to annually report product-specific data, including quantities placed on the market, material types,

recycled content, collection volumes, reuse cycles, and financial contributions. Without such data, reduction targets, EPR schemes, and effective market oversight cannot function properly.

In recent years, the policy instruments developed in Türkiye to address plastic pollution—together with the proposed regulation on single-use plastics—indicate that plastic management is increasingly being approached as a broader governance issue rather than one limited to waste disposal. However, effectively reducing plastic pollution requires regulatory frameworks that go beyond general reduction principles. Production restrictions, measurable reduction targets, a robust EPR mechanism, reuse systems, and comprehensive monitoring and data infrastructures must be integrated into the policy framework. At the same time, effective environmental governance requires a truly systemic and integrated transition. Such coherence cannot be achieved solely through isolated regulations addressing individual product groups. Managing single-use plastics effectively also requires complementary measures, including the banning of plastic and textile waste imports, the phasing out of overall plastic production, and the removal of subsidies supporting new petrochemical investments. Strengthening these elements within a comprehensive plastic policy framework would shift the focus from managing plastics only at the waste stage toward reducing them at the source within production and consumption systems, thereby accelerating Türkiye's transition toward a circular economy.

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The Istanbul Policy Center–Sabancı University–Stiftung Mercator Initiative aims to strengthen the academic, political, and social ties between Turkey and Germany as well as Turkey and Europe. The Initiative is based on the premise that the acquisition of knowledge and the exchange of people and ideas are preconditions for meeting the challenges of an increasingly globalized world in the 21st century. The Initiative focuses on two areas of cooperation, EU/German-Turkish relations and climate change, which are of essential importance for the future of Turkey and Germany within a larger European and global context.

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