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2011 MARITIME SECTOR REPORT

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Istanbul 2012

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TURKISH CHAMBER OF SHIPPING

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İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACKSEA REGIONS

# MARITIME SECTOR REPORT 2011

I S T A N B U L – 2012

# FOREWORD

**The "TURKISH SHIPPING SECTOR REPORT 2011" has been prepared within the framework of authority and responsibility granted by paragraphs No.12 and No.19 of Law No. 5174. The report covers quantitative facts and their analysis as of 31.12.2008 and is presented to our members,Turkish and foreign institutions.**

**The Report mainly contains seven chapters :**

**First chapter is on Turkish Merchant Fleet and its yearly developments. The fleet has been analysed by registry, building, tonnage and age. The position of Turkish Merchant Fleet within the world fleet and among the fleets of neighboring countries has also been examined.**

**Second chapter includes the cargoes transported by Merchant Fleet in 2011. The developments of cabotage and foreign trade cargoes, the progress of seaborne trade by flags have been explained in detail. Within this chapter, transported cargoes by types, seaborne trade to OECD countries, BSEC and EU countries have been taken into consideration.**

**Third chapter covers the developments in shipbuilding industry and the data about Turkish shipyards, including the recent developments in the field of yacht building industry in Turkey.**

**Fourth chapter covers Turkish Ports and the amount of cargo handled in 2011 and yearly developments.**

**Fifth chapter includes data about the passages through the Turkish Straits and the marine traffic systems.**

**Sixth chapter deals with marine tourism and yacht tourism in Turkey.**

**Seventh chapter is about the fishing sector and its latest developments.**

**Eighth chapter explains the maritime training affairs in Turkey.**

**The Report gives concrete and concise information about the current situation of Turkish Shipping. We believe that it will be a useful source of information for public and private institutions, for all researchers and interested agencies.**



**Metin KALKAVAN**

**Chairman of the Executive Committee**

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## TURKISH CHAMBER OF SHIPPING

Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping, briefly the Turkish Chamber of Shipping (TCS), is an important professional organization of the Turkish maritime sector, with its headquarters in İstanbul and main branch offices in Izmir, Bodrum, Marmaris, Antalya, İskenderun, Fethiye and Karadeniz Ereğlisi, (West Black Sea Region). The TCS has representation in Ankara and also representations at all the coastal towns and cities in Turkey. Turkish Chamber of Shipping was first established as İstanbul Chamber of Shipping in 1982 and afterwards its area of activities has been extended gradually so as to cover the region of the Sea of Marmara, the Aegean Sea coast and the Mediterranean coast of Turkey, then finally the Black Sea coast of the country.

### ITS AIMS

The most important aim of the Turkish Chamber of Shipping is to try to develop shipping in accordance with the national transportation and shipping policy and the public interest. Moreover, to promote the interests and provide the common requirements of its members, to arrange the development of the profession, to guide and facilitate the professional activities, to establish common rules and to inform the authorities on shipping matters and to keep the discipline, morals and solidarity of the shipping profession are the other major concerns of the Turkish Chamber of Shipping.

### ITS ACTIVITIES

The major activities of TCS are to establish rules and practices as regards shipping, to make researches and collect information on shipping, to ensure that sea trade is developing in accordance with the national policy of transportation, to supply information to foreign organizations on the possibilities and tariffs of the Turkish ports, to become member of and to follow activities of the international organizations concerned with shipping and to perform other functions stated in the law.

Among the members of the Turkish Chamber of Shipping are; shipowners, ship operators, shipping agents, ship sale and purchase brokers, forwarders, stevedores, tally firms, classification societies, marine insurance companies, underwriters, marine surveyors and experts, auxiliary services such as salvage, rescue, pilotage, dredging and yachting and also ship chandlers and suppliers, port and marina operators, ship-yacht builders and shipyards, ship-yacht equipment and repair services, maritime training companies, sand extractors and fishermen.

### TCS'S MEMBERSHIP TO NATIONAL AND INTERNATIONAL ORGANIZATIONS

Turkish Chamber of Shipping is a member of The Union of Chambers and Commodity Exchanges of Turkey and The International Chamber of Commerce-The Turkish National Committee. Apart from these two national organizations, TCS is also a member of The International Chamber of Shipping(ICS),International Chamber of Commerce-International Maritime Bureau (ICC-IMB), The Federation of National Associations of Ship Brokers and Agents (FONASBA), The Baltic and International Maritime Council (BIMCO), European Community Association of Ship Brokers and Agents (ECASBA), International Association of Independent Tanker Owners (INTERTANKO) and The Baltıc Exchange, The Yacht Harbour Associations ( TYHA),

International Council of Marine Industry Associations (ICOMIA), European Boat Associations (EBA).

## ITS PUBLICATIONS

Turkish Chamber of Shipping publishes many books of studies on shipping, including the annual “MARITIME SECTOR REPORT” in Turkish and in English and a monthy shipping magazine “TURKISH SHIPPING WORLD MAGAZINE”.

## ITS MEMBERS

The Turkish Chamber of Shipping has 16 representations and more than 8700 members. In accordance with Law No: 5174, concerning The Union of Chambers and Commodity Exchanges of Turkey(TOBB), every company performing activities in the field of maritime shipping has to become a Member of the Turkish Chamber of Shipping. Among the members of the Turkish Chamber of Shipping are shipowners, ship operators, ship agents, ship brokers, forwarders, tally firms, classification societies, underwriters, marine surveyors, auxiliary services, ship-yacht builders, shipyards, fishermen and many others. Its Members have been gathered in 53 Professional Commitees, according to their fields of occupation.

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# TURKISH MARITIME FLEET

# CHAPTER I

## THE DEVELOPMENT OF TURKISH SHIPPING

### A Close Investigation of the Turkish Merchant Fleet

A Close Investigation of the Turkish merchant fleet has been made according to Turkish National Ship Registry and Turkish International Ship Registry. The values which were established for individual ship groups have been considered by number , tonnage, import and built in Turkey.

In the investigation 1000 GRT and over ships have been taken into consideration. Age and tonnage ranges have also been evaluated in size and age group tables.

Number and tonnage evaluations have been shown totally as of 31 December 2011.

Assessments have been made also by taking into consideration the ships of the fleet above 1000 DWT .

### Examination of the Turkish Merchant Fleet by Number and Tonnage

A general examination of the merchant fleet has been made according to number, tonnage, import and built in Turkey. Table 1 shows that, Turkish merchant fleet consists of 649 ships. The examination of the table shows that 274 ships (6,9 million DWT) have been acquired by importation and 375 ships (2,4 million DWT) have been built in Turkey.

Distribution of 649 ships by their types ; 39.75 % dry cargo ships, 17.26 % bulk carriers, 11.56 % chemical tankers, 7.9 % containers and 5.08 % oil tankers, 17.73 % other types of ships.

Distribution of the fleet by DWT (9.3 Million) ; 52.88 % bulk carriers, 14.31 % dry cargo ships, 13.3 % oil tankers, 7.06 % containers and 12.45 % other types of ships.

By DWT,9.2 % of our fleet is registered in National Ship Registry, 90.8 % of fleet is registered in International Ship Registry. By Grt, 9.8 % of our fleet is registered in National Ship Registry, 90.2 % of the fleet is registered in International Ship Registry.(Table 2)

The fleet registered in National Ship Registry (858.191 Dwt)is composed of bulk carriers (55.3 %), container ships (17.5 %), dry cargo vessels (12.7 %), chemical tankers (5.7 %), oil tankers (4.2 %) and other types of ships (4.6 %). (Table 2)

TABLE (1) The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to Import and Built (1000 GRT and over) 31.12.2011

| SHIP TYPES | COUNT | | | | DWT | | | | GRT | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | BUILT | TOTAL | % | IMPORT | BUILT | TOTAL | % | IMPORT | BUILT | TOTAL | % |
| DRY CARGO | 58 | 200 | 258 | 39,75 | 377.660 | 952.061 | 1.329.721 | 14,31 | 242.349 | 606.844 | 849.193 | 13,84 |
| BULK CARRIER | 98 | 14 | 112 | 17,26 | 4.528.352 | 383.341 | 4.911.693 | 52,88 | 2.599.521 | 234.474 | 2.833.995 | 46,19 |
| CONTAINERS | 19 | 27 | 46 | 7,09 | 313.040 | 343.105 | 656.145 | 7,06 | 253.829 | 269.615 | 523.444 | 8,53 |
| DRY CARGO/CONTAINERS | 4 | 16 | 20 | 3,08 | 14.328 | 125.922 | 140.250 | 1,51 | 10.234 | 88.927 | 99.161 | 1,62 |
| CONTAINERS/RO-RO | 1 | 0 | 1 | 0,15 | 6.910 | 0 | 6.910 | 0,07 | 4.998 | 0 | 4.998 | 0,08 |
| OIL TANKERS | 17 | 16 | 33 | 5,08 | 1.150.371 | 85.547 | 1.235.918 | 13,3 | 619.502 | 56.037 | 675.539 | 11,01 |
| PRODUCT TANKERS | 0 | 1 | 1 | 0,15 | 0 | 3.260 | 3.260 | 0,04 | 0 | 2.085 | 2.085 | 0,03 |
| CHEMICAL TANKERS | 20 | 55 | 75 | 11,56 | 228.676 | 429.642 | 658.318 | 7,09 | 141.694 | 285.564 | 427.258 | 6,96 |
| VEGATABLE OIL TANKERS | 1 | 0 | 1 | 0,15 | 3.130 | 0 | 3.130 | 0,03 | 2.123 | 0 | 2.123 | 0,03 |
| LPG TANKERS | 6 | 0 | 6 | 0,92 | 25.868 | 0 | 25.868 | 0,28 | 24.579 | 0 | 24.579 | 0,4 |
| ASPHALT TANKERS | 1 | 0 | 1 | 0,15 | 2.770 | 0 | 2.770 | 0,03 | 1.900 | 0 | 1.900 | 0,03 |
| RO-RO SHIPS | 20 | 2 | 22 | 3,39 | 184.373 | 18.962 | 203.335 | 2,19 | 392.869 | 58.008 | 450.877 | 7,35 |
| RO-RO/PASSERGER | 10 | 4 | 14 | 2,16 | 24.000 | 4.908 | 28.908 | 0,31 | 56.702 | 7.804 | 64.506 | 1,05 |
| FERRY BOATS | 8 | 5 | 13 | 2,0 | 4.020 | 4.327 | 8.347 | 0,09 | 39.943 | 6.215 | 46.158 | 0,75 |
| TRAIN FERRIES | 0 | 7 | 7 | 1,08 | 0 | 7.291 | 7.291 | 0,08 | 0 | 11.266 | 11.266 | 0,18 |
| TRAIN FERRIES/RO-RO | 1 | 0 | 1 | 0,15 | 6.266 | 0 | 6.266 | 0,07 | 15.195 | 0 | 15.195 | 0,25 |
| PASSENGER AND CARGO SHIPS | 3 | 3 | 6 | 0,92 | 6.776 | 2.922 | 9.698 | 0,1 | 24.380 | 13.769 | 38.149 | 0,62 |
| HARBOUR FERRIES | 1 | 3 | 4 | 0,62 | 350 | 1.193 | 1.543 | 0,02 | 1.042 | 3.231 | 4.273 | 0,07 |
| HARBOUR CAR FERRIES | 0 | 20 | 20 | 3,08 | 0 | 21.078 | 21.078 | 0,23 | 0 | 26.167 | 26.167 | 0,43 |
| TUGS | 1 | 0 | 1 | 0,15 | 1.394 | 0 | 1.394 | 0,02 | 1.565 | 0 | 1.565 | 0,03 |
| SERVICE SHIPS | 1 | 1 | 2 | 0,31 | 338 | 2.576 | 2.914 | 0,03 | 1.013 | 2.206 | 3.219 | 0,05 |
| BARGE/FLOATING POSTOON | 2 | 0 | 2 | 0,31 | 19.774 | 0 | 19.774 | 0,21 | 19.608 | 0 | 19.608 | 0,32 |
| FLOATING CRANE | 0 | 1 | 1 | 0,15 | 0 | 0 | 0 | 0,0 | 0 | 6.196 | 6.196 | 0,1 |
| OTHERS | 2 | 0 | 2 | 0,31 | 4.612 | 0 | 4.612 | 0,05 | 3.854 | 0 | 3.854 | 0,06 |
| **TOTAL** | **274** | **375** | **649** | **100,0** | **6.903.008** | **2.386.136** | **9.289.144** | **100,0** | **4.456.900** | **1.678.409** | **6.135.309** | **100,0** |

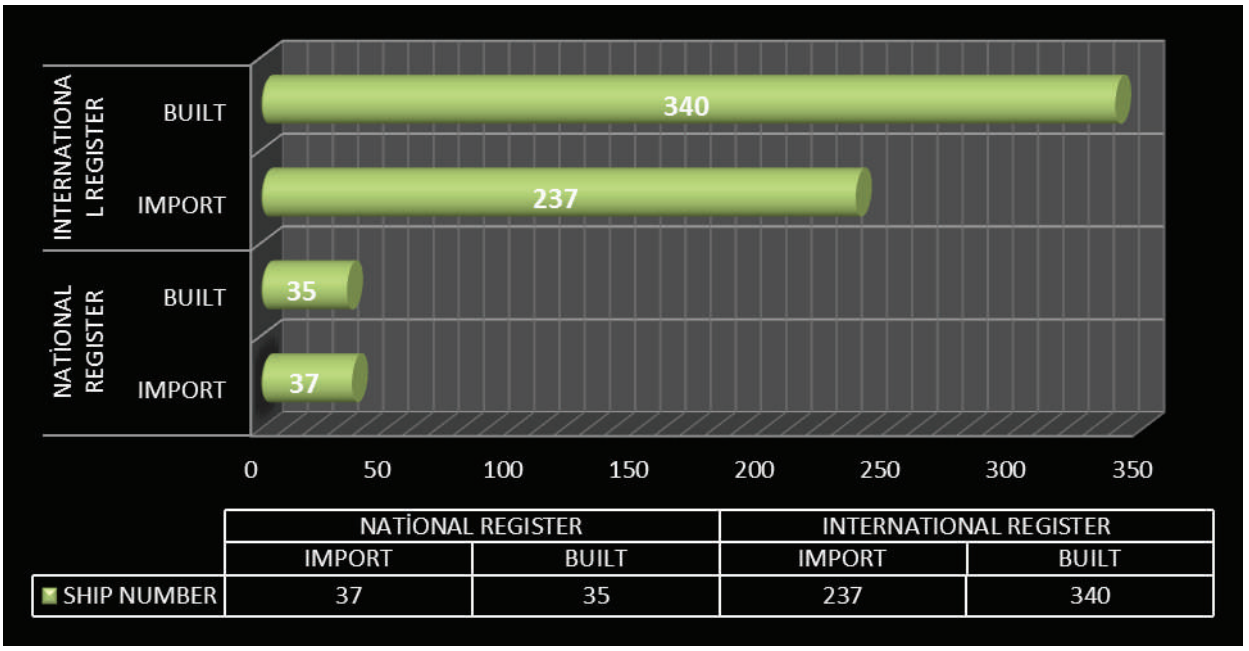
***Source : Turkish Chamber of Shipping -2011***

TABLE (2) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 GRT and over) 31.12.2011

| SHIP TYPES | COUNT | | | | DWT | | | | GRT | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | National Reg. | Inter. Reg. | Total | % | National Reg. | Inter. Reg. | Total | % | National Reg. | Inter. Reg. | Total | % |
| DRY CARGO | 22 | 236 | 258 | 39,75 | 109.093 | 1.220.628 | 1.329.721 | 14,31 | 70.550 | 778.643 | 849.193 | 13,84 |
| BULK CARRIER | 11 | 101 | 112 | 17,26 | 474.281 | 4.437.412 | 4.911.693 | 52,88 | 272.706 | 2.561.289 | 2.833.995 | 46,19 |
| CONTAINERS | 8 | 38 | 46 | 7,09 | 150.264 | 505.881 | 656.145 | 7,06 | 119.746 | 403.698 | 523.444 | 8,53 |
| DRY CARGO/CONTAINERS | 0 | 20 | 20 | 3,08 | 0 | 140.250 | 140.250 | 1,51 | 0 | 99.161 | 99.161 | 1,62 |
| CONTAINERS/RO-RO | 0 | 1 | 1 | 0,15 | 0 | 6.910 | 6.910 | 0,07 | 0 | 4.998 | 4.998 | 0,08 |
| OIL TANKERS | 4 | 29 | 33 | 5,08 | 36.007 | 1.199.911 | 1.235.918 | 13,3 | 23.483 | 652.056 | 675.539 | 11,01 |
| PRODUCT TANKERS | 0 | 1 | 1 | 0,15 | 0 | 3.260 | 3.260 | 0,04 | 0 | 2.085 | 2.085 | 0,03 |
| CHEMICAL TANKERS | 6 | 69 | 75 | 11,56 | 48.604 | 609.714 | 658.318 | 7,09 | 32.428 | 394.830 | 427.258 | 6,96 |
| VEGATABLE OIL TANKERS | 1 | 0 | 1 | 0,15 | 3.130 | 0 | 3.130 | 0,03 | 2.123 | 0 | 2.123 | 0,03 |
| LPG TANKERS | 0 | 6 | 6 | 0,92 | 0 | 25.868 | 25.868 | 0,28 | 0 | 24.579 | 24.579 | 0,4 |
| ASPHALT TANKERS | 1 | 0 | 1 | 0,15 | 2.770 | 0 | 2.770 | 0,03 | 1.900 | 0 | 1.900 | 0,03 |
| RO-RO SHIPS | 1 | 21 | 22 | 3,39 | 11.636 | 191.699 | 203.335 | 2,19 | 29.004 | 421.873 | 450.877 | 7,35 |
| RO-RO/PASSERGER | 1 | 13 | 14 | 2,16 | 656 | 28.252 | 28.908 | 0,31 | 1.065 | 63.441 | 64.506 | 1,05 |
| FERRY BOATS | 0 | 13 | 13 | 2,0 | 0 | 8.347 | 8.347 | 0,09 | 0 | 46.158 | 46.158 | 0,75 |
| TRAIN FERRIES | 7 | 0 | 7 | 1,08 | 7.291 | 0 | 7.291 | 0,08 | 11.266 | 0 | 11.266 | 0,18 |
| TRAIN FERRIES/RO-RO | 0 | 1 | 1 | 0,15 | 0 | 6.266 | 6.266 | 0,07 | 0 | 15.195 | 15.195 | 0,25 |
| PASSENGER AND CARGO SHIPS | 4 | 2 | 6 | 0,92 | 7.297 | 2.401 | 9.698 | 0,1 | 25.997 | 12.152 | 38.149 | 0,62 |
| HARBOUR FERRIES | 1 | 3 | 4 | 0,62 | 441 | 1.102 | 1.543 | 0,02 | 1.077 | 3.196 | 4.273 | 0,07 |
| HARBOUR CAR FERRIES | 1 | 19 | 20 | 3,08 | 2.314 | 18.764 | 21.078 | 0,23 | 1.596 | 24.571 | 26.167 | 0,43 |
| TUGS | 1 | 0 | 1 | 0,15 | 1.394 | 0 | 1.394 | 0,02 | 1.565 | 0 | 1.565 | 0,03 |
| SERVICE SHIPS | 1 | 1 | 2 | 0,31 | 338 | 2.576 | 2.914 | 0,03 | 1.013 | 2.206 | 3.219 | 0,05 |
| BARGE/FLOATING POSTOON | 0 | 2 | 2 | 0,31 | 0 | 19.774 | 19.774 | 0,21 | 0 | 19.608 | 19.608 | 0,32 |
| FLOATING CRANE | 1 | 0 | 1 | 0,15 | 0 | 0 | 0 | 0,0 | 6.196 | 0 | 6.196 | 0,1 |
| OTHERS | 1 | 1 | 2 | 0,31 | 2.675 | 1.937 | 4.612 | 0,05 | 2.191 | 1.663 | 3.854 | 0,06 |
| **TOTAL** | **72** | **577** | **649** | **100,0** | **858.191** | **8.430.953** | **9.289.144** | **100,0** | **603.906** | **5.531.403** | **6.135.309** | **100,0** |

***Source : Turkish Chamber of Shipping -2011***

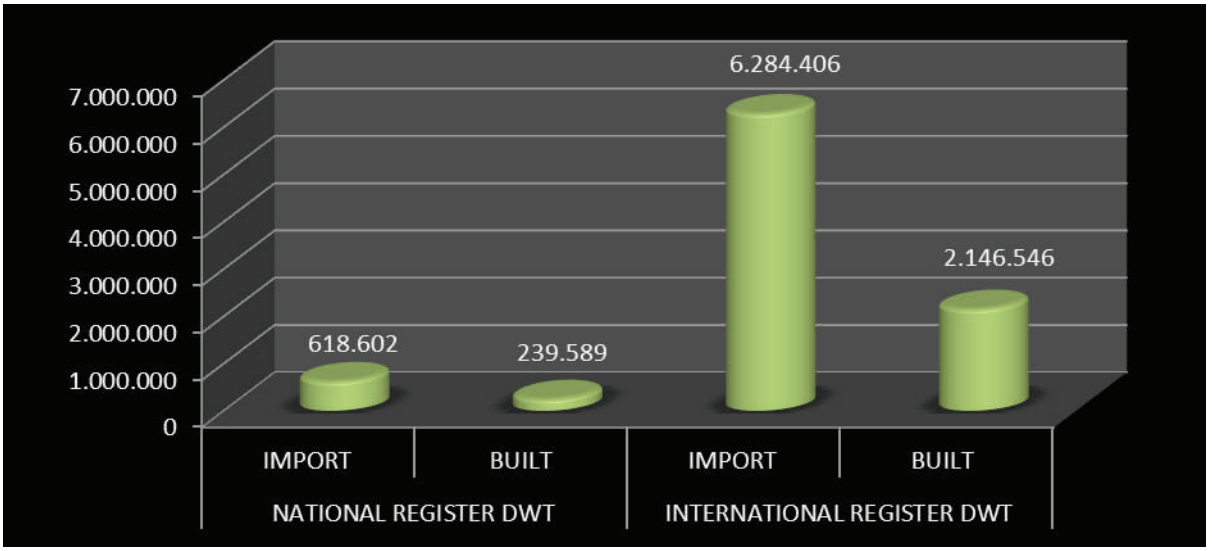
**GRAPH (1) : Investigation of Registries (Number)**
**(1000 Grt and Over)**




Tables 3-4-5 show the general statistical investigation of the Turkish merchant fleet by import and domestic built, according to Turkish National Registry and International Ship Registry.

Table 3 shows Turkish merchant fleet which consists of 649 ships. 11.1 % of total fleet (72 ships) registered in National Ship Registry and 88.9 % of total fleet (577 ships) registered in International Ship Registry.

**GRAPH (2) : Examination of Registries (dwt) (1000 Grt and Over)**



The majority of the fleet registered in International Ship Registry (8.4 million DWT) is composed of bulk carriers (52.6 %), dry cargo ships (14.4 %), oil tankers (14.2 %), chemical tankers (7.2 %), container (6,0 %) and other types of ships (5.6 %).

Table 3 shows that 51.4 % of the National Ship Registry (72 ships) has been acquired by import and 48.6 % has been acquired by construction in Turkey. 41.4 % of the International Ship Registry (577 ships) has been acquired by import and 58.9 % has been acquired by construction in Turkey.

Table 4 shows, 72.1 % of the National Ship Registry (858.191 dwt) has been acquired by import and 27.9 % has been acquired by construction in Turkey. 74.5 % of the International Ship Registry (8.4 million dwt) has been acquired by import and 25.5 % has been acquired by construction in Turkey.

Table 5 shows, 603.906 grt of the fleet registered in National Ship Registry 418.985 grt has been acquired by import, 184.921 grt of the fleet has been acquired by domestic built. 5.531.403 grt of the fleet registered in International Ship Registry 4.037.915 grt has been acquired by import, 1.493.488 grt of the fleet has been acquired by domestic built.

**GRAPH (3) : Examination of Registries (GRT)**
**(1000 Grt and Over)**

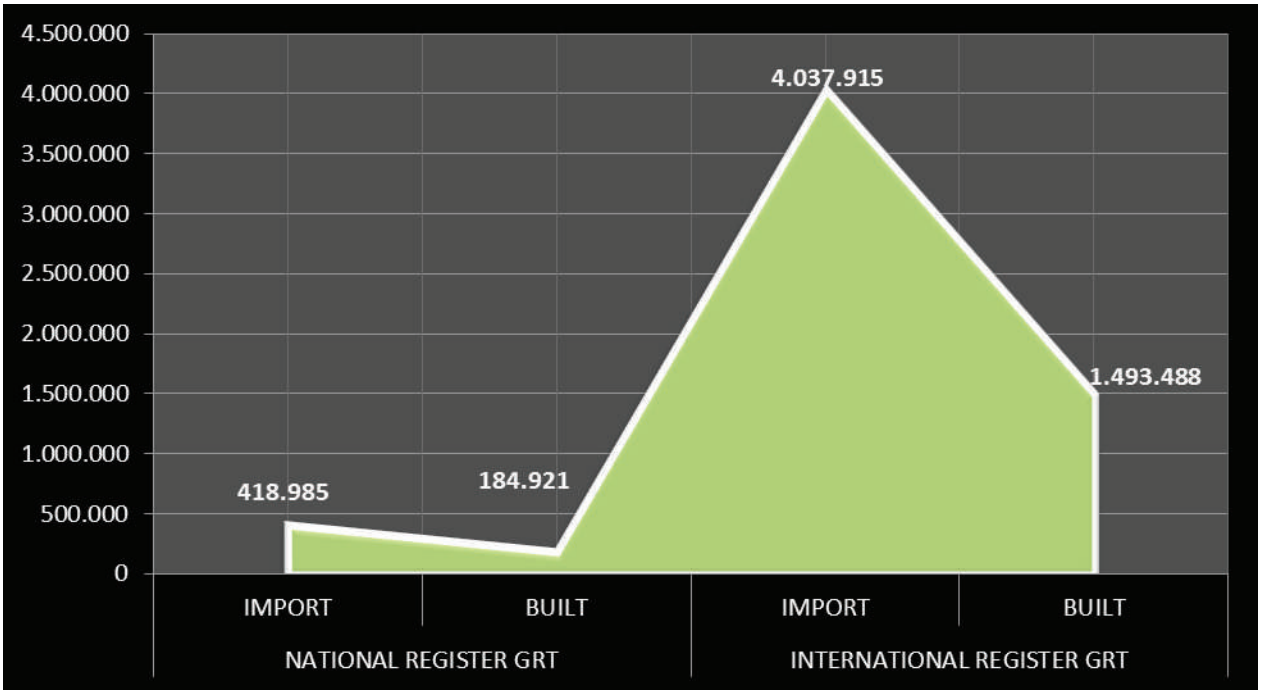


**TABLE (3) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries Number (1000 GRT and over) 31.12.2011**

| | NATIONAL REGISTER | | | | INTERNATIONAL REGISTER | | | | NAT.&INT.REGISTER SHIPS | | | | GENERAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | | BUILT | | IMPORT | | BUILT | | IMPORT | | BUILT | | TOTAL |
| **SHIP TYPES** | **NR.** | **%** | **NR** | **%** | **NR** | **%** | **NR** | **%** | **NR.** | **%** | **NR.** | **%** | **NR.** |
| DRY CARGO | 10 | 3.88 | 12 | 4.65 | 48 | 18.6 | 188 | 72.87 | 58 | 22.48 | 200 | 77.52 | 258 |
| BULK CARRIER | 10 | 8.93 | 1 | 0.89 | 88 | 78.57 | 13 | 11.61 | 98 | 87.5 | 14 | 12.5 | 112 |
| CONTAINERS | 5 | 10.87 | 3 | 6.52 | 14 | 30.43 | 24 | 52.17 | 19 | 41.3 | 27 | 58.7 | 46 |
| DRY CARGO/CONTAINERS | 0 | 0.0 | 0 | 0.0 | 4 | 20.0 | 16 | 80.0 | 4 | 20.0 | 16 | 80.0 | 20 |
| CONTAINERS/RO-RO | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| OIL TANKERS | 3 | 9.09 | 1 | 3.03 | 14 | 42.42 | 15 | 45.45 | 17 | 51.52 | 16 | 48.48 | 33 |
| PRODUCT TANKERS | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 100.0 | 1 |
| CHEMICAL TANKERS | 1 | 1.33 | 5 | 6.67 | 19 | 25.33 | 50 | 66.67 | 20 | 26.67 | 55 | 73.33 | 75 |
| VEGATABLE OIL TANKERS | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| LPG TANKERS | 0 | 0.0 | 0 | 0.0 | 6 | 100.0 | 0 | 0.0 | 6 | 100.0 | 0 | 0.0 | 6 |
| ASPHALT TANKERS | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| RO-RO SHIPS | 1 | 4.55 | 0 | 0.0 | 19 | 86.36 | 2 | 9.09 | 20 | 90.91 | 2 | 9.09 | 22 |
| RO-RO/PASSERGER | 0 | 0.0 | 1 | 7.14 | 10 | 71.43 | 3 | 21.43 | 10 | 71.43 | 4 | 28.57 | 14 |
| FERRY BOATS | 0 | 0.0 | 0 | 0.0 | 8 | 61.54 | 5 | 38.46 | 8 | 61.54 | 5 | 38.46 | 13 |
| TRAIN FERRIES | 0 | 0.0 | 7 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 7 | 100.0 | 7 |
| TRAIN FERRIES/RO-RO | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| PASSENGER AND CARGO SHIPS | 2 | 33.33 | 2 | 33.33 | 1 | 16.67 | 1 | 16.67 | 3 | 50.0 | 3 | 50.0 | 6 |
| HARBOUR FERRIES | 0 | 0.0 | 1 | 25.0 | 1 | 25.0 | 2 | 50.0 | 1 | 25.0 | 3 | 75.0 | 4 |
| HARBOUR CAR FERRIES | 0 | 0.0 | 1 | 5.0 | 0 | 0.0 | 19 | 95.0 | 0 | 0.0 | 20 | 100.0 | 20 |
| TUGS | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| SERVICE SHIPS | 1 | 50.0 | 0 | 0.0 | 0 | 0.0 | 1 | 50.0 | 1 | 50.0 | 1 | 50.0 | 2 |
| BARGE/FLOATING POSTOON | 0 | 0.0 | 0 | 0.0 | 2 | 100.0 | 0 | 0.0 | 2 | 100.0 | 0 | 0.0 | 2 |
| FLOATING CRANE | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 1 |
| OTHERS | 1 | 50.0 | 0 | 0.0 | 1 | 50.0 | 0 | 0.0 | 2 | 100.0 | 0 | 0.0 | 2 |
| **TOTAL** | **37** | **5,7** | **35** | **5,39** | **237** | **36,52** | **340** | **52,39** | **274** | **42,22** | **375** | **57,78** | **649** |

***Source :Turkish Chamber of Shipping - 2011***

**TABLE (4) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries DWT (1000 GRT and over) 31.12.2011**

| | NATIONAL REGISTER | | | | INTERNATIONAL REGISTER | | | | NAT.&INT.REGISTER SHIPS | | | | GENERAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | | BUILT | | IMPORT | | BUILT | | IMPORT | | BUILT | | TOTAL |
| **SHIP TYPES** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** |
| DRY CARGO | 39.789 | 2.99 | 69.304 | 5.21 | 337.871 | 25.41 | 882.757 | 66.39 | 377.660 | 28.4 | 952.061 | 71.6 | 1.329.721 |
| BULK CARRIER | 417.528 | 8.5 | 56.753 | 1.16 | 4.110.824 | 83.69 | 326.588 | 6.65 | 4.528.352 | 92.2 | 383.341 | 7.8 | 4.911.693 |
| CONTAINERS | 99.760 | 15.2 | 50.504 | 7.7 | 213.280 | 32.51 | 292.601 | 44.59 | 313.040 | 47.71 | 343.105 | 52.29 | 656.145 |
| DRY CARGO/CONTAINERS | 0 | 0.0 | 0 | 0.0 | 14.328 | 10.22 | 125.922 | 89.78 | 14.328 | 10.22 | 125.922 | 89.78 | 140.250 |
| CONTAINERS/RO-RO | 0 | 0.0 | 0 | 0.0 | 6.910 | 100.0 | 0 | 0.0 | 6.910 | 100.0 | 0 | 0.0 | 6.910 |
| OIL TANKERS | 32.868 | 2.66 | 3.139 | 0.25 | 1.117.503 | 90.42 | 82.408 | 6.67 | 1.150.371 | 93.08 | 85.547 | 6.92 | 1.235.918 |
| PRODUCT TANKERS | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 3.260 | 100.0 | 0 | 0.0 | 3.260 | 100.0 | 3.260 |
| CHEMICAL TANKERS | 1.638 | 0.25 | 46.966 | 7.13 | 227.038 | 34.49 | 382.676 | 58.13 | 228.676 | 34.74 | 429.642 | 65.26 | 658.318 |
| VEGATABLE OIL TANKERS | 3.130 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 3.130 | 100.0 | 0 | 0.0 | 3.130 |
| LPG TANKERS | 0 | 0.0 | 0 | 0.0 | 25.868 | 100.0 | 0 | 0.0 | 25.868 | 100.0 | 0 | 0.0 | 25.868 |
| ASPHALT TANKERS | 2.770 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 2.770 | 100.0 | 0 | 0.0 | 2.770 |
| RO-RO SHIPS | 11.636 | 5.72 | 0 | 0.0 | 172.737 | 84.95 | 18.962 | 9.33 | 184.373 | 90.67 | 18.962 | 9.33 | 203.335 |
| RO-RO/PASSERGER | 0 | 0.0 | 656 | 2.27 | 24.000 | 83.02 | 4.252 | 14.71 | 24.000 | 83.02 | 4.908 | 16.98 | 28.908 |
| FERRY BOATS | 0 | 0.0 | 0 | 0.0 | 4.020 | 48.16 | 4.327 | 51.84 | 4.020 | 48.16 | 4.327 | 51.84 | 8.347 |
| TRAIN FERRIES | 0 | 0.0 | 7.291 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 7.291 | 100.0 | 7.291 |
| TRAIN FERRIES/RO-RO | 0 | 0.0 | 0 | 0.0 | 6.266 | 100.0 | 0 | 0.0 | 6.266 | 100.0 | 0 | 0.0 | 6.266 |
| PASSENGER AND CARGO SHIPS | 5.076 | 52.34 | 2.221 | 22.9 | 1.700 | 17.53 | 701 | 7.23 | 6.776 | 69.87 | 2.922 | 30.13 | 9.698 |
| HARBOUR FERRIES | 0 | 0.0 | 441 | 28.58 | 350 | 22.68 | 752 | 48.74 | 350 | 22.68 | 1.193 | 77.32 | 1.543 |
| HARBOUR CAR FERRIES | 0 | 0.0 | 2.314 | 10.98 | 0 | 0.0 | 18.764 | 89.02 | 0 | 0.0 | 21.078 | 100.0 | 21.078 |
| TUGS | 1.394 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1.394 | 100.0 | 0 | 0.0 | 1.394 |
| SERVICE SHIPS | 338 | 11.6 | 0 | 0.0 | 0 | 0.0 | 2.576 | 88.4 | 338 | 11.6 | 2.576 | 88.4 | 2.914 |
| BARGE/FLOATING POSTOON | 0 | 0.0 | 0 | 0.0 | 19.774 | 100.0 | 0 | 0.0 | 19.774 | 100.0 | 0 | 0.0 | 19.774 |
| FLOATING CRANE | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 0 |
| OTHERS | 2.675 | 58.0 | 0 | 0.0 | 1.937 | 42.0 | 0 | 0.0 | 4.612 | 100.0 | 0 | 0.0 | 4.612 |
| **TOTAL** | **618.602** | **6,66** | **239.589** | **2,58** | **6.284.406** | **67,65** | **2.146.546** | **23,11** | **6.903.008** | **74,31** | **2.386.136** | **25,69** | **9.289.144** |

***Source : Turkish Chamber of Shipping – 2011***

**TABLE (5) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries GRT (1000 GRT and over) 31.12.2011**

| | NATIONAL REGISTER | | | | INTERNATIONAL REGISTER | | | | NAT.&INT.REGISTER SHIPS | | | | GENERAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | | BUILT | | IMPORT | | BUILT | | IMPORT | | BUILT | | TOTAL |
| **SHIP TYPES** | **GRT** | **%** | **GRT** | **%** | **GRT** | **%** | **GRT** | **%** | **GRT** | **%** | **GRT** | **%** | **GRT** |
| DRY CARGO | 25.403 | 2.99 | 45.147 | 5.32 | 216.946 | 25.55 | 561.697 | 66.14 | 242.349 | 28.54 | 606.844 | 71.46 | 849.193 |
| BULK CARRIER | 239.723 | 8.46 | 32.983 | 1.16 | 2.359.798 | 83.27 | 201.491 | 7.11 | 2.599.521 | 91.73 | 234.474 | 8.27 | 2.833.995 |
| CONTAINERS | 79.807 | 15.25 | 39.939 | 7.63 | 174.022 | 33.25 | 229.676 | 43.88 | 253.829 | 48.49 | 269.615 | 51.51 | 523.444 |
| DRY CARGO/CONTAINERS | 0 | 0.0 | 0 | 0.0 | 10.234 | 10.32 | 88.927 | 89.68 | 10.234 | 10.32 | 88.927 | 89.68 | 99.161 |
| CONTAINERS/RO-RO | 0 | 0.0 | 0 | 0.0 | 4.998 | 100.0 | 0 | 0.0 | 4.998 | 100.0 | 0 | 0.0 | 4.998 |
| OIL TANKERS | 21.664 | 3.21 | 1.819 | 0.27 | 597.838 | 88.5 | 54.218 | 8.03 | 619.502 | 91.7 | 56.037 | 8.3 | 675.539 |
| PRODUCT TANKERS | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 2.085 | 100.0 | 0 | 0.0 | 2.085 | 100.0 | 2.085 |
| CHEMICAL TANKERS | 1.082 | 0.25 | 31.346 | 7.34 | 140.612 | 32.91 | 254.218 | 59.5 | 141.694 | 33.16 | 285.564 | 66.84 | 427.258 |
| VEGATABLE OIL TANKERS | 2.123 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 2.123 | 100.0 | 0 | 0.0 | 2.123 |
| LPG TANKERS | 0 | 0.0 | 0 | 0.0 | 24.579 | 100.0 | 0 | 0.0 | 24.579 | 100.0 | 0 | 0.0 | 24.579 |
| ASPHALT TANKERS | 1.900 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1.900 | 100.0 | 0 | 0.0 | 1.900 |
| RO-RO SHIPS | 29.004 | 6.43 | 0 | 0.0 | 363.865 | 80.7 | 58.008 | 12.87 | 392.869 | 87.13 | 58.008 | 12.87 | 450.877 |
| RO-RO/PASSERGER | 0 | 0.0 | 1.065 | 1.65 | 56.702 | 87.9 | 6.739 | 10.45 | 56.702 | 87.9 | 7.804 | 12.1 | 64.506 |
| FERRY BOATS | 0 | 0.0 | 0 | 0.0 | 39.943 | 86.53 | 6.215 | 13.47 | 39.943 | 86.53 | 6.215 | 13.47 | 46.158 |
| TRAIN FERRIES | 0 | 0.0 | 11.266 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 11.266 | 100.0 | 11.266 |
| TRAIN FERRIES/RO-RO | 0 | 0.0 | 0 | 0.0 | 15.195 | 100.0 | 0 | 0.0 | 15.195 | 100.0 | 0 | 0.0 | 15.195 |
| PASSENGER AND CARGO SHIPS | 13.510 | 35.41 | 12.487 | 32.73 | 10.870 | 28.49 | 1.282 | 3.36 | 24.380 | 63.91 | 13.769 | 36.09 | 38.149 |
| HARBOUR FERRIES | 0 | 0.0 | 1.077 | 25.2 | 1.042 | 24.39 | 2.154 | 50.41 | 1.042 | 24.39 | 3.231 | 75.61 | 4.273 |
| HARBOUR CAR FERRIES | 0 | 0.0 | 1.596 | 6.1 | 0 | 0.0 | 24.571 | 93.9 | 0 | 0.0 | 26.167 | 100.0 | 26.167 |
| TUGS | 1.565 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1.565 | 100.0 | 0 | 0.0 | 1.565 |
| SERVICE SHIPS | 1.013 | 31.47 | 0 | 0.0 | 0 | 0.0 | 2.206 | 68.53 | 1.013 | 31.47 | 2.206 | 68.53 | 3.219 |
| BARGE/FLOATING POSTOON | 0 | 0.0 | 0 | 0.0 | 19.608 | 100.0 | 0 | 0.0 | 19.608 | 100.0 | 0 | 0.0 | 19.608 |
| FLOATING CRANE | 0 | 0.0 | 6.196 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 6.196 | 100.0 | 6.196 |
| OTHERS | 2.191 | 56.85 | 0 | 0.0 | 1.663 | 43.15 | 0 | 0.0 | 3.854 | 100.0 | 0 | 0.0 | 3.854 |
| **TOTAL** | **418.985** | **6,83** | **184.921** | **3,01** | **4.037.915** | **65,81** | **1.493.488** | **24,34** | **4.456.900** | **72,64** | **1.678.409** | **27,36** | **6.135.309** |

***Source : Turkish Chamber of Shipping - 2011***

## The Age Profile of Turkish Merchant Fleet

Table 6 shows the average age profile of Turkish Merchant Fleet according to ship types, number of ships and tonnage ranges.

The Merchant Fleet of 1.000 Grt and above comprises of 649 ships. The average age of these ships is 24.29 as of 31.12.2011.

The average age of dry cargo ships is 24 which consists of 14.3 % of the fleet. The average age of bulk carriers is 15 which consists of 52.9 % of the fleet. The average age of container is 11 and chemical tankers is 9 which consists of 7,2 % of the general fleet. The average age of oil tankers are 17 which consists of 13.3 % of the fleet.

**TABLE ( 6 ) : The Average Age Profile of the Turkish Merchant Fleet 1000 GRT and Over**

| SHIP TYPES | NUMBER | TONNAGE (DWT) | AVE. AGE (DWT) | TONNAGE (GRT) | AVE. AGE (GRT) | AVE. AGE |
|---|---|---|---|---|---|---|
| DRY CARGO | 258 | 1.329.721 | 23,54 | 849.193 | 23,22 | 24,0 |
| BULK CARRIER | 112 | 4.911.693 | 11,82 | 2.833.995 | 12,05 | 15,0 |
| CONTAINERS | 46 | 656.145 | 9,34 | 523.444 | 9,24 | 11,0 |
| DRY CARGO/CONTAINERS | 20 | 140.250 | 10,64 | 99.161 | 10,53 | 11,0 |
| CONTAINERS/RO-RO | 1 | 6.910 | 26,0 | 4.998 | 26,0 | 26,0 |
| OIL TANKERS | 33 | 1.235.918 | 9,45 | 675.539 | 9,87 | 17,0 |
| PRODUCT TANKERS | 1 | 3.260 | 21,0 | 2.085 | 21,0 | 21,0 |
| CHEMICAL TANKERS | 75 | 658.318 | 6,52 | 427.258 | 6,46 | 9,0 |
| VEGATABLE OIL TANKERS | 1 | 3.130 | 37,0 | 2.123 | 37,0 | 37,0 |
| LPG TANKERS | 6 | 25.868 | 21,72 | 24.579 | 21,75 | 23,0 |
| ASPHALT TANKERS | 1 | 2.770 | 31,0 | 1.900 | 31,0 | 31,0 |
| RO-RO SHIPS | 22 | 203.335 | 17,84 | 450.877 | 14,05 | 19,0 |
| RO-RO/PASSERGER | 14 | 28.908 | 30,56 | 64.506 | 27,61 | 21,0 |
| FERRY BOATS | 13 | 8.347 | 13,97 | 46.158 | 15,19 | 11,0 |
| TRAIN FERRIES | 7 | 7.291 | 43,11 | 11.266 | 40,4 | 40,0 |
| TRAIN FERRIES/RO-RO | 1 | 6.266 | 33,0 | 15.195 | 33,0 | 33,0 |
| PASSENGER AND CARGO SHIPS | 6 | 9.698 | 44,21 | 38.149 | 38,3 | 37,0 |
| HARBOUR FERRIES | 4 | 1.543 | 30,91 | 4.273 | 31,52 | 31,0 |
| HARBOUR CAR FERRIES | 20 | 21.078 | 26,85 | 26.167 | 24,49 | 25,0 |
| TUGS | 1 | 1.394 | 28,0 | 1.565 | 28,0 | 28,0 |
| SERVICE SHIPS | 2 | 2.914 | 29,94 | 3.219 | 36,7 | 43,0 |
| BARGE/FLOATING POSTOON | 2 | 19.774 | 13,0 | 19.608 | 13,0 | 13,0 |
| FLOATING CRANE | 1 | | 0,0 | 6.196 | 21,0 | 21,0 |
| OTHERS | 2 | 4.612 | 31,62 | 3.854 | 32,32 | 36,0 |
| Total | **649** | **9.289.144** | **22,96** | **6.135.309** | **23,49** | **24,29** |

***Source : Turkish Chamber of Shipping - 2011***

Table 7 shows Turkish Merchant Fleet by age and tonnage ranges. Turkish Merchant Fleet consists of 649 ships of 9.289.144 DWT.

- 224 ships of 5.036.659 Dwt are between 0-9 age range,
- 99 ships of 1.388.964 Dwt are between 10-19 age range,
- 162 ships of 1.864.122 Dwt are between 20-29 age range,
- 164 ships of 999.399 Dwt are between 30 and over age range.

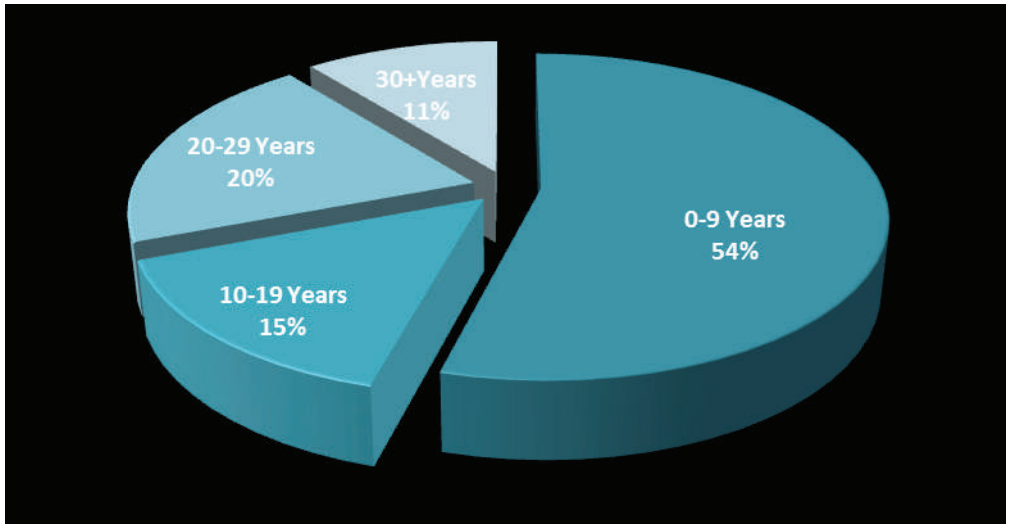
Graph shows age groups of the fleet. 54 % of the fleet are between 0-9 age range, 15 % of the fleet are between 10-19 age range, 20 % of the fleet are between 20-29 age range and 11 % are 30 years and over.

**TABLE ( 7 ) : Turkish Merchant Fleet Distribution by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** |
| 150 - 1499 | 13 | 7,727 | 10 | 4,678 | 13 | 7.550 | 12 | 9,258 | 48 | 29,213 |
| 1500 - 5999 | 81 | 337,278 | 39 | 146,488 | 77 | 273,801 | 107 | 324,883 | 304 | 1,082,450 |
| 6000 - 9999 | 30 | 216,719 | 20 | 161,396 | 32 | 237.220 | 19 | 128,503 | 101 | 743,838 |
| 10000 - 34999 | 56 | 1,023,732 | 18 | 351,866 | 20 | 430,004 | 24 | 434.600 | 118 | 2,240,202 |
| 35000 - 52999 | 7 | 342,238 | 10 | 485.510 | 16 | 647.090 | 1 | 36,818 | 34 | 1,511,656 |
| 53000 - 79999 | 24 | 1,474,297 | 1 | 74,167 | 4 | 268,457 | 1 | 65,337 | 30 | 1,882,258 |
| 80000 - 119999 | 6 | 515,059 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 515,059 |
| 120000+ | 7 | 1,119,608 | 1 | 164,859 | 0 | 0 | 0 | 0 | 8 | 1,284,467 |
| **Total** | **224** | **5,036,659** | **99** | **1,388,964** | **162** | **1,864,122** | **164** | **999,399** | **649** | **9,289,144** |

***Source : Turkish Chamber of Shipping - 2011***

**GRAPH ( 4) : Turkish Merchant Fleet Distribution by Age Groups.**
**DWT %**




Below Tables show the age profile of Turkish Merchant Fleet according to tonnage ranges and ship types, dry cargo ships, bulk carriers, oil tankers, chemical tankers, containers and Ro-Ro by age and tonnage ranges.

Table 8 shows the Dry Cargo segment (258 ships) which is 1.329.721 DWT.

- 47 ships of 263.140 DWT are between 0-9 age range,
- 32 ships of 146.938 DWT are between 10-19 age range,
- 87 ships of 510.912 DWT are between 20-29 age range,
- 92 ships of 407.569 DWT are between 30 and over age range.

**TABLE ( 8 ) : Dry Cargo Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** |
| 150-1499 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1.162 | 1 | 1.162 |
| 1500 - 7500 | 41 | 188.650 | 28 | 112,599 | 71 | 296,202 | 83 | 285,815 | 223 | 883,266 |
| 7501 - 9999 | 2 | 16.510 | 4 | 34,339 | 11 | 92,607 | 2 | 15,791 | 19 | 159,247 |
| 10000 - 34999 (HandySize) | 4 | 57.980 | 0 | 0 | 4 | 75,277 | 7 | 105,963 | 15 | 239.220 |
| 35000 - 52999(HandyMax) | 0 | 0 | 0 | 0 | 1 | 46,826 | 0 | 0 | 1 | 46,826 |
| 53000 - 79999 (Panamax) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 80000 - 119999 (CapeSize) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 120000+ (Large Size) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **47** | **263.140** | **32** | **146.938** | **87** | **510.912** | **92** | **407.569** | **258** | **1.329.721** |

***Source : Turkish Chamber of Shipping - 2011***

20 % of Dry Cargo Ships are between 0-9 age range, 11 % are between 10-19 age range, 20 % are between 20-29 age range, 31 % are 30 years and over.

**GRAPH ( 5 ) : Average Age of Dry Cargo Segment DWT %**

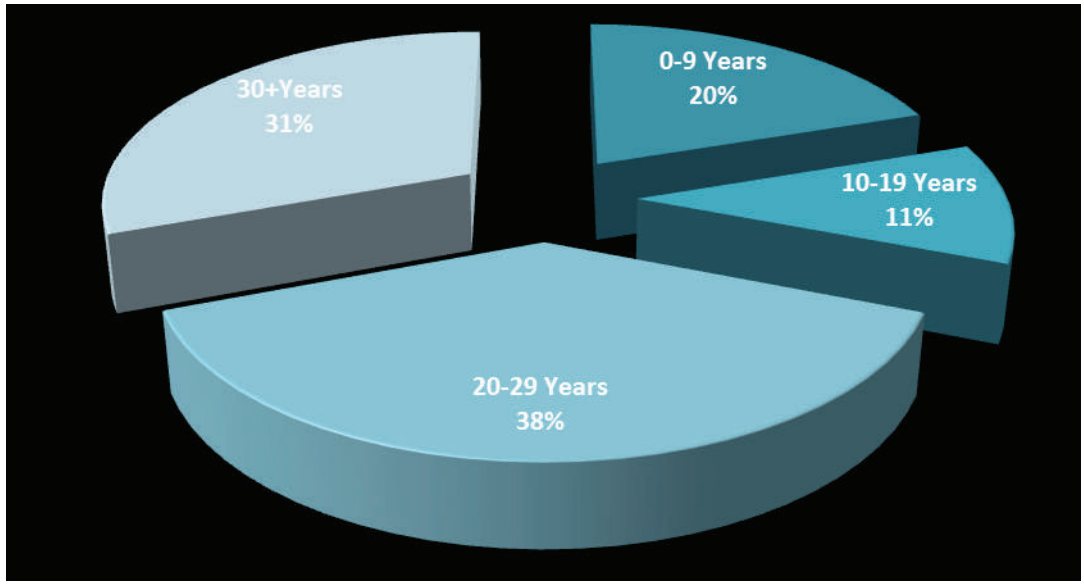


Table 9 shows the bulk carrier segment ( 112 ships) which is 4.911.692 DWT.

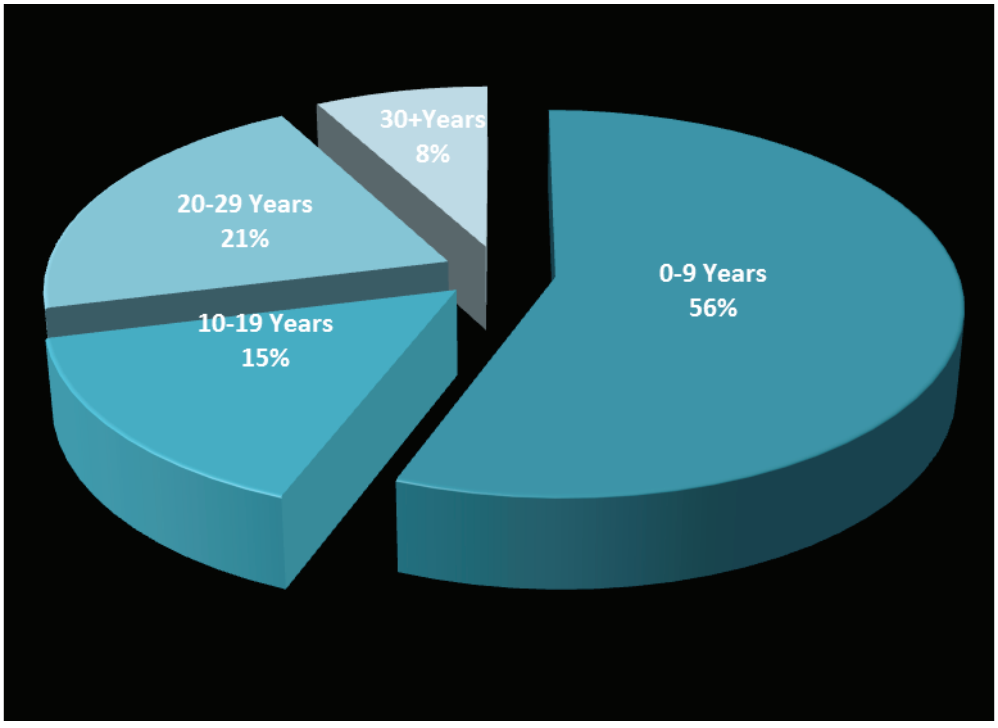
- 49 ships of 2.745.669 Dwt are between 0-9 age range,
- 19 ships of 747.167 Dwt are between 10-19 age range,
- 28 ships of 1.026.928 Dwt are between 20-29 age range,
- 16 ships of 391.929 Dwt are between 30 and over age range.

**TABLE ( 9 ) : Bulk Carrier Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** |
| 150-1499 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1500 - 7500 | 3 | 17,542 | 0 | 0 | 1 | 6,317 | 0 | 0 | 4 | 23,859 |
| 7501 - 9999 | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10000 - 34999 (HandySize) | 12 | 299,102 | 8 | 187.490 | 9 | 227,361 | 14 | 289,774 | 43 | 1,003,727 |
| 35000 - 52999(HandyMax) | 2 | 101,241 | 10 | 485.510 | 15 | 600,264 | 1 | 36,818 | 28 | 1,223,833 |
| 53000 - 79999 (Panamax) | 24 | 1,474,297 | 1 | 741.670 | 3 | 192,986 | 1 | 65,337 | 29 | 1,806,787 |
| 80000 - 119999 (CapeSize) | 6 | 515,059 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 515,059 |
| 120000+ (Large Size) | 2 | 338,428 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 338,428 |
| Total | **49** | **2.745.669** | **19** | **747.167** | **28** | **1.026.928** | **16** | **391.929** | **112** | **4.911.693** |

***Source : Turkish Chamber of Shipping - 2011***

**GRAPH ( 6 ) : Average Age of Bulk Carriers DWT %**




56 % of the bulk carriers are 0-9 age range, 15 % are 10-19 age range, 21 % are 20-29 age range and 8 % are 30 age and over.

Tablo 10 shows oil tankers segment (33) which is 1.235.918 DWT

- 14 ships of 877.454 DWT are 0-9 age range,
- 6 ships of 185.169 DWT are 10-19 age range,
- 7 ships of 154.304 DWT are 20-29 age range,
- 6 ships of 18.991 DWT are 30 age and over.

**TABLE ( 10 ) : Oil Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** |
| 150 - 1499 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1,193 | 1 | 1,193 |
| 1500 - 5999 | 5 | 20,031 | 5 | 20.310 | 2 | 7,588 | 4 | 11,537 | 16 | 59,466 |
| 6000 - 19999 | 3 | 36,132 | 0 | 0 | 2 | 12,637 | 1 | 6,261 | 6 | 55.030 |
| 20000 - 49999 (Product Tanker) | 1 | 40,111 | 0 | 0 | 2 | 58,608 | 0 | 0 | 3 | 98,719 |
| 50000 - 79999 (Panamax) | 0 | 0 | 0 | 0 | 1 | 75,471 | 0 | 0 | 1 | 75,471 |
| 80000 - 109999 (Aframax) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 110000 - 164999 (Suezmax) | 5 | 781.180 | 1 | 164,859 | 0 | 0 | 0 | 0 | 6 | 946,039 |
| 165000 - 299999 (VLCC) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 300000 + (ULCC) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **14** | **877.454** | **6** | **185.169** | **7** | **154.304** | **6** | **18.991** | **33** | **1.235.918** |

***Source : Turkish Chamber of Shipping - 2011***

71 % of the oil tankers are 0-9 age range, 15 % are 10-19 age range, 12 % are 20-29 age range and 2 % are 30 age and over.

**GRAPH ( 7 ) : Average Age of Oil Tankers**
**DWT %**

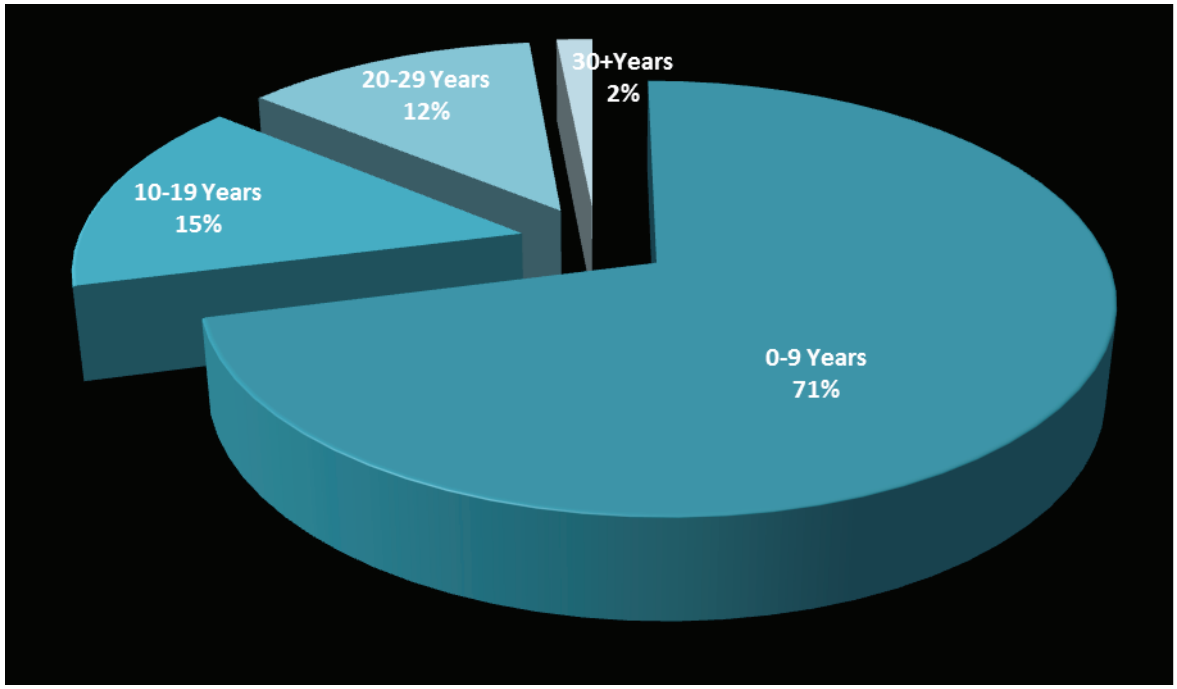


Table 11 shows the average age of the chemical tankers ( 75 ships) which are 658.318 DWT.

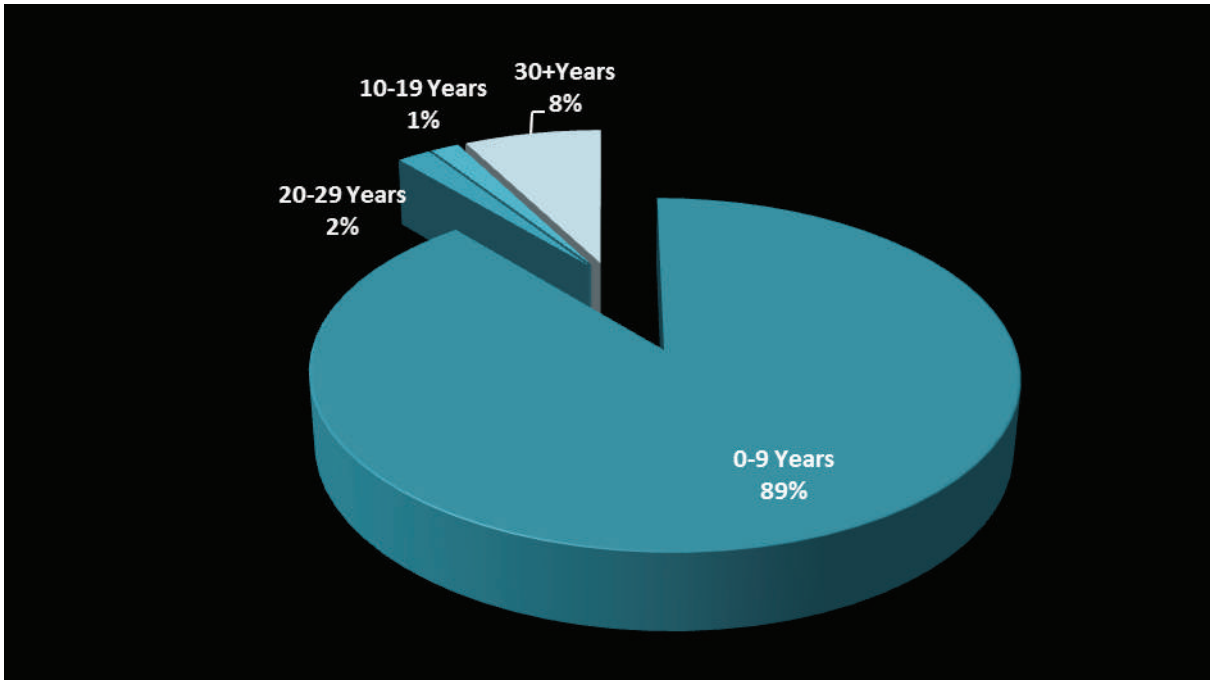
- 59 ships of 585.637 Dwt are 0-9 age range,
- 3 ships of 10.390 Dwt are 10-19 age range,
- 3 ships of 12.276 Dwt are 20-29 age range,
- 10 ships of 50.015 Dwt are 30 age and over.

**TABLE ( 11 ) : Chemical Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** |
| 150 - 1499 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1500 - 5999 | 31 | 125.274 | 3 | 10.390 | 3 | 12,276 | 7 | 24,222 | 44 | 172.162 |
| 6000 - 19999 | 22 | 219.477 | 0 | 0 | 0 | 0 | 3 | 25,793 | 25 | 245.270 |
| 20000 - 49999 (Product Tanker) | 2 | 40.000 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 40.000 |
| 50000 - 79999 (Panamax) | 4 | 200.886 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 200.886 |
| 80000 - 109999 (Aframax) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 110000 - 164999 (Suezmax) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 165000 - 299999 (VLCC) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 300000 + (ULCc) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **59** | **585.637** | **3** | **10.390** | **3** | **12.276** | **10** | **50.015** | **75** | **658.318** |

***Source :Turkish Chamber of Shipping - 2011***

**GRAPH ( 8 ) : Average age of Chemical Tankers**
**DWT %**




89 % of other type of tankers are 0-9 age range, 1 % are 10-19 age range, 2 % are 20-29 age range and 8 % are 30 age and over.

Table 12 shows the average age of the Container ships (46 ships ) which are 656.145 DWT.

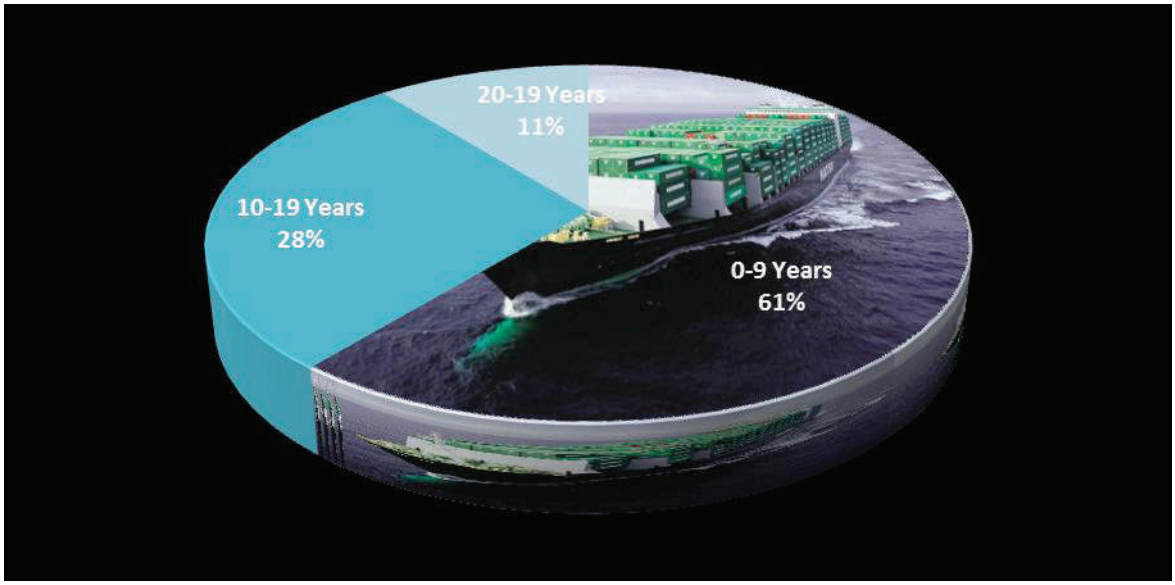
- 23 ships of 370.763 Dwt are 0-9 age range,
- 16 ships of 185.951 Dwt are 10-19 age range,
- 7 ships of 70.431 Dwt are 20-29 age range,

**TABLE ( 12 ) : Container Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** | **No.** | **DWT** |
| **150 - 1499** | 1 | 1.200 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1.200 |
| **1500 - 5999** | 2 | 8.860 | 3 | 12.990 | 1 | 4.487 | 0 | 0 | 6 | 26.337 |
| **6000 - 9999** | 1 | 6.500 | 4 | 27.440 | 3 | 25.118 | 0 | 0 | 8 | 59.058 |
| **10000 - 34999** | 19 | 383.203 | 9 | 145.521 | 3 | 40.826 | 0 | 0 | 31 | 569.550 |
| **35000 - 52999** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **53000 - 79999** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **80000 - 119999** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **120000+** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **23** | **399.763** | **16** | **185.951** | **7** | **70.431** | **0** | **0** | **46** | **656.145** |

***Source : Turkish Chamber of Shipping - 2011***

**GRAPH ( 9 ) : The Average Age of the Container ships DWT%**




61 % of Container ships are 0-9 age range, 28 % are 10-19 age range and 11 % are 20-29 age range.

Tablo13 shows the average age of the Ro- Ro Ships, (22 ships) which are 203.335 DWT.

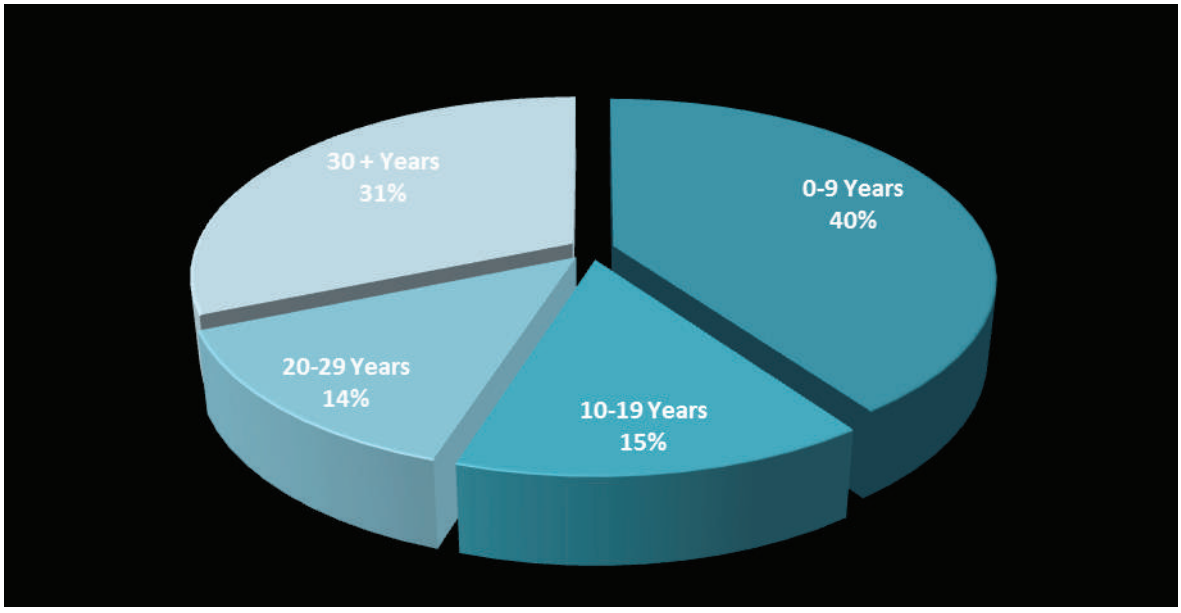
- 8 ships of 81.741 Dwt are 0-9 age range,
- 4 ship of 29.982 Dwt are 10-19 age range,
- 2 ships of 27.932 Dwt are 20-29 age range,
- 8 ships of 63.680 Dwt are 30 age range and over.
-

**TABLE ( 13 ) : Ro-Ro Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **NR.** | **DWT** | **NR.** | **DWT** | **NR.** | **DWT** | **NR.** | **DWT** | **NR.** | **DWT** |
| **150 - 1499** | 0 | 0 | 1 | 457 | 0 | 0 | 0 | 0 | 1 | 457 |
| **1500 - 5999** | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 10,292 | 3 | 10,292 |
| **6000 - 9999** | 5 | 47,405 | 3 | 29,525 | 0 | 0 | 3 | 24,704 | 11 | 101,634 |
| **10000 - 34999** | 3 | 34,336 | 0 | 0 | 2 | 27,932 | 2 | 28,684 | 7 | 90,952 |
| **35000 - 52999** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **53000 - 79999** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **80000 - 119999** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **120000+** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **8** | **81.741** | **4** | **29.982** | **2** | **27.932** | **8** | **63.680** | **22** | **203.335** |

***Source: Turkish Chamber of Shipping 2010***

**GRAPH ( 10 ) : The Average Age of the Ro- Ro Ships DWT%**




40 % of Ro-Ro Ships are 0-9 age range, 15 % are 10-19 age range, 14 % are 20-29 age range and 31 % are 30 age and over.

Table 14 shows the average age of the Ro- Ro Ships, (22 ships) which are 450.877 GRT.

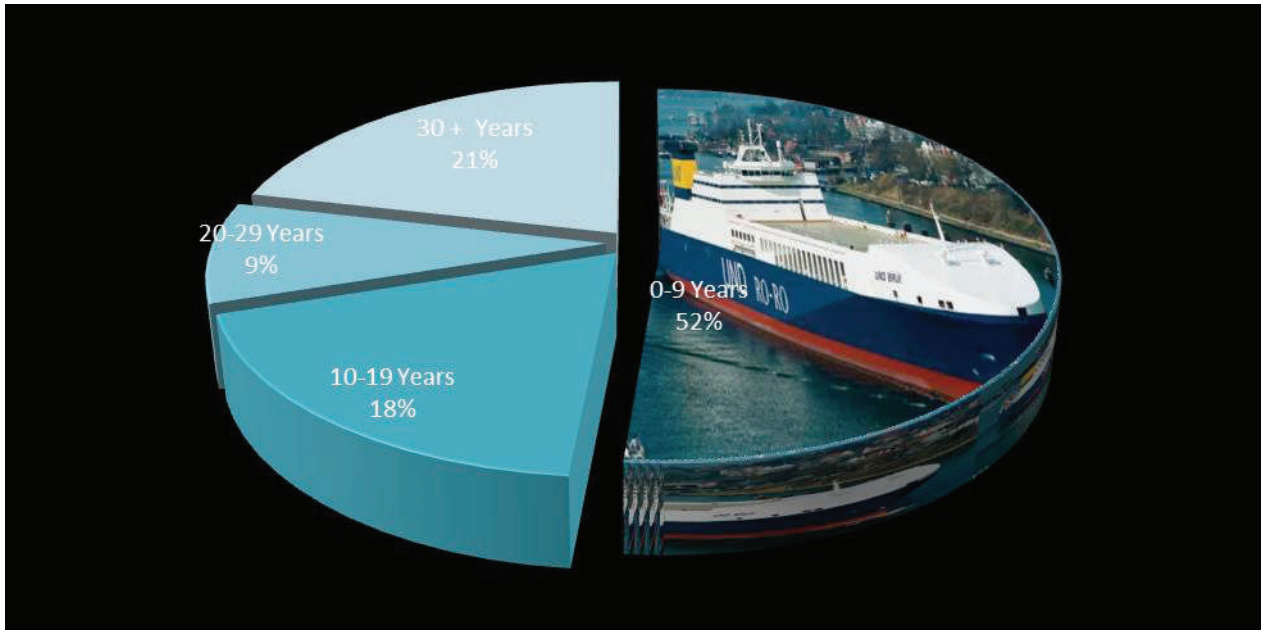
- 8 ships of 232.032 Grt are 0-9 age range,
- 4 ships of 83.187 Grt are 10-19 age range,
- 2 ships of 39.378 Grt are 20-29 age range,
- 8 ships of 96.280 Grt are 30 age range and over.

**TABLE ( 14 ) : Ro-Ro Ships by Tonnage and Age Groups (GRT)**
**(1000 GRT and Over)**

| | 0-9 Years | | 10-19 Years | | 20-29 Years | | 30 + Years | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| **DIVISIONS OF TONNAGE** | **NR.** | **GRT** | **NR.** | **GRT** | **NR.** | **GRT** | **NR.** | **GRT** | **NR.** | **GRT** |
| **500 - 1600** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **1601 - 3000** | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2.981 | 1 | 2.981 |
| **3001 - 5000** | 0 | 0 | 1 | 3.780 | 0 | 0 | 1 | 4.312 | 2 | 8.092 |
| **5001 - 10000** | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 6.568 | 1 | 6.568 |
| **10001 - 30000** | 8 | 232.032 | 3 | 79.407 | 2 | 39.378 | 5 | 82.419 | 18 | 433.236 |
| **30001 - 50000** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **50001 +** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **8** | **232.032** | **4** | **83.187** | **2** | **39.378** | **8** | **96.280** | **22** | **450.877** |

***Source : Turkish Chamber of Shipping - 2011***

**GRAPH ( 11 ) : The Average Age of the Ro- Ro Ship**
**GRT %**




52 % of Ro-Ro Ships are 0-9 age range, 18 % are 10-19 age range, 9 % are 20-29 age range and 21 % are 30 age and over.

## Turkish Merchant Fleet by Number and Tonnage 1000 DWT and Over

(Accepted International Seaborne Transportion Tonnage)

Table 15 shows that the numerical and tonnage examination of ships which are 1000 DWT and over, are suitable for international transportation. Turkish merchant fleet consists of 750 ships, 15,1 % of total fleet ( 113 ships ) registered in National Ship Registry and 84,9 % of total fleet (637ships) registered in International Ship Registry.

The total DWT and GT values of ships which are 1000 DWT and over are 8.550.694 DWT and 6.157.002 GRT. The majority of these tonnage on DWT basis is composed of 51.88 % bulk carriers,15.56 % dry cargo ships and 13,38 % oil tankers.

This segment consists of the 96.8 % of the total fleet on DWT bases.

9,9 % of the dry cargo segment which is totally 1.473.642 DWT are registered in National Ship Registry, 90,1 % are registered in International Ship Registry.

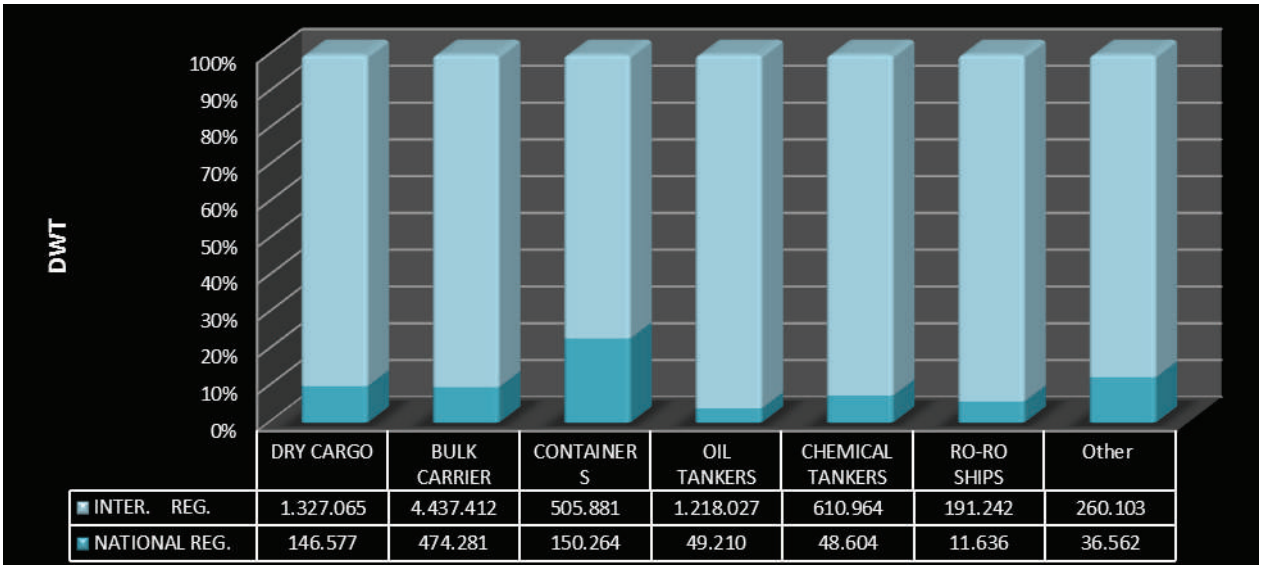
9,7 % of the dry bulk segment which is totally 4.911.693 DWT are registered in National Ship Registry, 90,3 % are registered in International Ship Registry.

3.9 % of the oil tanker segment which is totally 1.267.237 are registered in National Ship Registry, 96.1 % are registered in International Ship Registry.

7,4 % of the Chemical Tankers which are totally 659.568 DWT are registered in national Ship Registry. 92,6 % are registered in International Ship Registry.

29,9 % of the container ship segment which is totally 656.145 DWT are registered in National Ship Registry, 77,1 % are registered in International Ship Registry.

**GRAPH (12) : Turkish Fleet According to Registries, 1000 DWT and Over**




| | DRY CARGO | BULK CARRIER | CONTAINERS | OIL TANKERS | CHEMICAL TANKERS | RO-RO SHIPS | Other |
|---|---|---|---|---|---|---|---|
| INTER. REG. | 1.327.065 | 4.437.412 | 505.881 | 1.218.027 | 610.964 | 191.242 | 260.103 |
| NATIONAL REG. | 146.577 | 474.281 | 150.264 | 49.210 | 48.604 | 11.636 | 36.562 |

**TABLE (15) The General Examination of The Turkish Merchant Fleet by Number And Tonnage According to Import and Built (1000 DWT and over) 31.12.2011**

| SHIP TYPES | COUNT | | | | DWT | | | | GRT | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | BUILT | TOTAL | % | IMPORT | BUILT | TOTAL | % | IMPORT | BUILT | TOTAL | % |
| DRY CARGO | 71 | 289 | 360 | 48,0 | 395.728 | 1.077.914 | 1.473.642 | 15,56 | 252.335 | 677.872 | 930.207 | 15,11 |
| BULK CARRIER | 98 | 14 | 112 | 14,93 | 4.528.352 | 383.341 | 4.911.693 | 51,88 | 2.599.521 | 234.474 | 2.833.995 | 46,03 |
| CONTAINERS | 19 | 27 | 46 | 6,13 | 313.040 | 343.105 | 656.145 | 6,93 | 253.829 | 269.615 | 523.444 | 8,5 |
| DRY CARGO/CONTAINERS | 4 | 16 | 20 | 2,67 | 14.328 | 125.922 | 140.250 | 1,48 | 10.234 | 88.927 | 99.161 | 1,61 |
| CONTAINERS/RO-RO | 1 | 0 | 1 | 0,13 | 6.910 | 0 | 6.910 | 0,07 | 4.998 | 0 | 4.998 | 0,08 |
| OIL TANKERS | 20 | 36 | 56 | 7,47 | 1.155.196 | 112.041 | 1.267.237 | 13,38 | 622.369 | 71.295 | 693.664 | 11,27 |
| PRODUCT TANKERS | 0 | 1 | 1 | 0,13 | 0 | 3.260 | 3.260 | 0,03 | 0 | 2.085 | 2.085 | 0,03 |
| CHEMICAL TANKERS | 20 | 56 | 76 | 10,13 | 228.676 | 430.892 | 659.568 | 6,97 | 141.694 | 286.539 | 428.233 | 6,96 |
| VEGATABLE OIL TANKERS | 1 | 0 | 1 | 0,13 | 3.130 | 0 | 3.130 | 0,03 | 2.123 | 0 | 2.123 | 0,03 |
| LPG TANKERS | 6 | 0 | 6 | 0,8 | 25.868 | 0 | 25.868 | 0,27 | 24.579 | 0 | 24.579 | 0,4 |
| ASPHALT TANKERS | 1 | 0 | 1 | 0,13 | 2.770 | 0 | 2.770 | 0,03 | 1.900 | 0 | 1.900 | 0,03 |
| RO-RO SHIPS | 19 | 2 | 21 | 2,8 | 183.916 | 18.962 | 202.878 | 2,14 | 389.089 | 58.008 | 447.097 | 7,26 |
| RO-RO/PASSERGER | 7 | 4 | 11 | 1,47 | 22.962 | 6.476 | 29.438 | 0,31 | 46.001 | 7.216 | 53.217 | 0,86 |
| FERRY BOATS | 1 | 1 | 2 | 0,27 | 1.790 | 1.839 | 3.629 | 0,04 | 10.552 | 1.435 | 11.987 | 0,19 |
| TRAIN FERRIES | 0 | 2 | 2 | 0,27 | 0 | 3.233 | 3.233 | 0,03 | 0 | 2.655 | 2.655 | 0,04 |
| TRAIN FERRIES/RO-RO | 1 | 0 | 1 | 0,13 | 6.266 | 0 | 6.266 | 0,07 | 15.195 | 0 | 15.195 | 0,25 |
| PASSENGER AND CARGO SHIPS | 3 | 1 | 4 | 0,53 | 6.776 | 1.700 | 8.476 | 0,09 | 24.380 | 10.583 | 34.963 | 0,57 |
| HARBOUR CAR FERRIES | 0 | 10 | 10 | 1,33 | 0 | 17.560 | 17.560 | 0,19 | 0 | 12.953 | 12.953 | 0,21 |
| TUGS | 1 | 0 | 1 | 0,13 | 1.394 | 0 | 1.394 | 0,01 | 1.565 | 0 | 1.565 | 0,03 |
| SERVICE SHIPS | 5 | 7 | 12 | 1,6 | 6.696 | 10.695 | 17.391 | 0,18 | 3.129 | 4.792 | 7.921 | 0,13 |
| BARNE/FLOATING PONTOON | 2 | 0 | 2 | 0,27 | 19.774 | 0 | 19.774 | 0,21 | 19.608 | 0 | 19.608 | 0,32 |
| OTHERS | 4 | 0 | 4 | 0,53 | 7.316 | 0 | 7.316 | 0,08 | 5.452 | 0 | 5.452 | 0,09 |
| **TOTAL** | **284** | **466** | **750** | **100,0** | **6.930.888** | **2.536.940** | **9.467.829** | **100,0** | **4.428.553** | **1.728.449** | **6.157.002** | **100,0** |

**TABLE (16): The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries (1000 DWT and over) 31.12.2011**

| | NATIONAL REGISTER | | | | INTERNATIONAL REGISTER | | | | NAT.&INT.REGISTER SHIPS | | | | GENERAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | | BUILT | | IMPORT | | BUILT | | IMPORT | | BUILT | | TOTAL |
| **SHIP TYPES** | **NR.** | **%** | **NR.** | **%** | **NR.** | **%** | **NR.** | **%** | **NR.** | **%** | **NR.** | **%** | **NR.** |
| DRY CARGO | 17 | 4.72 | 36 | 10.0 | 54 | 15.0 | 253 | 70.28 | 71 | 19.72 | 289 | 80.28 | 360 |
| BULK CARRIER | 10 | 8.93 | 1 | 0.89 | 88 | 78.57 | 13 | 11.61 | 98 | 87.5 | 14 | 12.5 | 112 |
| CONTAINERS | 5 | 10.87 | 3 | 6.52 | 14 | 30.43 | 24 | 52.17 | 19 | 41.3 | 27 | 58.7 | 46 |
| DRY CARGO/CONTAINERS | 0 | 0.0 | 0 | 0.0 | 4 | 20.0 | 16 | 80.0 | 4 | 20.0 | 16 | 80.0 | 20 |
| CONTAINERS/RO-RO | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| OIL TANKERS | 5 | 8.93 | 8 | 14.29 | 15 | 26.79 | 28 | 50.0 | 20 | 35.71 | 36 | 64.29 | 56 |
| PRODUCT TANKERS | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 100.0 | 1 |
| CHEMICAL TANKERS | 1 | 1.32 | 5 | 6.58 | 19 | 25.0 | 51 | 67.11 | 20 | 26.32 | 56 | 73.68 | 76 |
| VEGATABLE OIL TANKERS | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| LPG TANKERS | 0 | 0.0 | 0 | 0.0 | 6 | 100.0 | 0 | 0.0 | 6 | 100.0 | 0 | 0.0 | 6 |
| ASPHALT TANKERS | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| RO-RO SHIPS | 1 | 4.76 | 0 | 0.0 | 18 | 85.71 | 2 | 9.52 | 19 | 90.48 | 2 | 9.52 | 21 |
| RO-RO/PASSERGER | 0 | 0.0 | 1 | 9.09 | 7 | 63.64 | 3 | 27.27 | 7 | 63.64 | 4 | 36.36 | 11 |
| FERRY BOATS | 0 | 0.0 | 0 | 0.0 | 1 | 50.0 | 1 | 50.0 | 1 | 50.0 | 1 | 50.0 | 2 |
| TRAIN FERRIES | 0 | 0.0 | 2 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 2 | 100.0 | 2 |
| TRAIN FERRIES/RO-RO | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| PASSENGER AND CARGO SHIP | 2 | 50.0 | 1 | 25.0 | 1 | 25.0 | 0 | 0.0 | 3 | 75.0 | 1 | 25.0 | 4 |
| HARBOUR CAR FERRIES | 0 | 0.0 | 3 | 30.0 | 0 | 0.0 | 7 | 70.0 | 0 | 0.0 | 10 | 100.0 | 10 |
| TUGS | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 |
| SERVICE SHIPS | 2 | 16.67 | 6 | 50.0 | 3 | 25.0 | 1 | 8.33 | 5 | 41.67 | 7 | 58.33 | 12 |
| BARGE/FLOATING PONTOON | 0 | 0.0 | 0 | 0.0 | 2 | 100.0 | 0 | 0.0 | 2 | 100.0 | 0 | 0.0 | 2 |
| OTHERS | 1 | 25.0 | 0 | 0.0 | 3 | 75.0 | 0 | 0.0 | 4 | 100.0 | 0 | 0.0 | 4 |
| **TOTAL** | 47 | 6,27 | 66 | 8,8 | 237 | 31,6 | 400 | 53,33 | 284 | 37,87 | 466 | 62,13 | 750 |

***Source : Turkish Chamber of Shipping - 2010***

**TABLE (17) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 DWT and over) 31.12.2011**

| | COUNT | | | | DWT | | | | GRT | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **SHIP TYPES** | **NATIONAL REG.** | **INTER. REG.** | **TOTAL** | **%** | **NATIONAL REG.** | **INTER. REG.** | **TOTAL** | **%** | **NATIONAL REG.** | **INTER. REG.** | **TOTAL** | **%** |
| DRY CARGO | 53 | 307 | 360 | 48,0 | 146.577 | 1.327.065 | 1.473.642 | 15,56 | 91.508 | 838.699 | 930.207 | 15,11 |
| BULK CARRIER | 11 | 101 | 112 | 14,93 | 474.281 | 4.437.412 | 4.911.693 | 51,88 | 272.706 | 2.561.289 | 2.833.995 | 46,03 |
| CONTAINERS | 8 | 38 | 46 | 6,13 | 150.264 | 505.881 | 656.145 | 6,93 | 119.746 | 403.698 | 523.444 | 8,5 |
| DRY CARGO/ CONTAINERS | 0 | 20 | 20 | 2,67 | 0 | 140.250 | 140.250 | 1,48 | 0 | 99.161 | 99.161 | 1,61 |
| CONTAINERS/RO-RO | 0 | 1 | 1 | 0,13 | 0 | 6.910 | 6.910 | 0,07 | 0 | 4.998 | 4.998 | 0,08 |
| OIL TANKERS | 13 | 43 | 56 | 7,47 | 49.210 | 1.218.027 | 1.267.237 | 13,38 | 31.547 | 662.117 | 693.664 | 11,27 |
| PRODUCT TANKERS | 0 | 1 | 1 | 0,13 | 0 | 3.260 | 3.260 | 0,03 | 0 | 2.085 | 2.085 | 0,03 |
| CHEMICAL TANKERS | 6 | 70 | 76 | 10,13 | 48.604 | 610.964 | 659.568 | 6,97 | 32.428 | 395.805 | 428.233 | 6,96 |
| VEGATABLE OIL TANKERS | 1 | 0 | 1 | 0,13 | 3.130 | 0 | 3.130 | 0,03 | 2.123 | 0 | 2.123 | 0,03 |
| LPG TANKERS | 0 | 6 | 6 | 0,8 | 0 | 25.868 | 25.868 | 0,27 | 0 | 24.579 | 24.579 | 0,4 |
| ASPHALT TANKERS | 1 | 0 | 1 | 0,13 | 2.770 | 0 | 2.770 | 0,03 | 1.900 | 0 | 1.900 | 0,03 |
| RO-RO SHIPS | 1 | 20 | 21 | 2,8 | 11.636 | 191.242 | 202.878 | 2,14 | 29.004 | 418.093 | 447.097 | 7,26 |
| RO-RO/PASSERGER | 1 | 10 | 11 | 1,47 | 1.339 | 28.099 | 29.438 | 0,31 | 977 | 52.240 | 53.217 | 0,86 |
| FERRY BOATS | 0 | 2 | 2 | 0,27 | 0 | 3.629 | 3.629 | 0,04 | 0 | 11.987 | 11.987 | 0,19 |
| TRAIN FERRIES | 2 | 0 | 2 | 0,27 | 3.233 | 0 | 3.233 | 0,03 | 2.655 | 0 | 2.655 | 0,04 |
| TRAIN FERRIES/RO-RO | 0 | 1 | 1 | 0,13 | 0 | 6.266 | 6.266 | 0,07 | 0 | 15.195 | 15.195 | 0,25 |
| PASSENGER AND CARGO SHIPS | 3 | 1 | 4 | 0,53 | 6.776 | 1.700 | 8.476 | 0,09 | 24.093 | 10.870 | 34.963 | 0,57 |
| HARBOUR CAR FERRIES | 3 | 7 | 10 | 1,33 | 4.926 | 12.634 | 17.560 | 0,19 | 3.398 | 9.555 | 12.953 | 0,21 |
| TUGS | 1 | 0 | 1 | 0,13 | 1.394 | 0 | 1.394 | 0,01 | 1.565 | 0 | 1.565 | 0,03 |
| SERVICE SHIPS | 8 | 4 | 12 | 1,6 | 10.319 | 7.072 | 17.391 | 0,18 | 3.734 | 4.187 | 7.921 | 0,13 |
| BARGE/FLOATING PONTOON | 0 | 2 | 2 | 0,27 | 0 | 19.774 | 19.774 | 0,21 | 0 | 19.608 | 19.608 | 0,32 |
| OTHERS | 1 | 3 | 4 | 0,53 | 2.675 | 4.641 | 7.316 | 0,08 | 2.191 | 3.261 | 5.452 | 0,09 |
| **TOTAL** | **113** | **637** | **750** | **100,0** | **917.134** | **8.550.694** | **9.467.829** | **100,0** | **619.575** | **5.537.427** | **6.157.002** | **100,0** |

**TABLE (18) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries DWT (1000 DWT and over) 31.12.2011**

| | NATIONAL REGISTER | | | | INTERNATIONAL REGISTER | | | | NAT.&INT.REGISTER SHIPS | | | | GENERAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | IMPORT | | BUILT | | IMPORT | | BUILT | | IMPORT | | BUILT | | TOTAL |
| **SHIP TYPES** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** | **%** | **DWT** |
| DRY CARGO | 48.828 | 3.31 | 97.749 | 6.63 | 346.900 | 23.54 | 980.165 | 66.51 | 395.728 | 26.85 | 1.077.914 | 73.15 | 1.473.642 |
| BULK CARRIER | 417.528 | 8.5 | 56.753 | 1.16 | 4.110.824 | 83.69 | 326.588 | 6.65 | 4.528.352 | 92.2 | 383.341 | 7.8 | 4.911.693 |
| CONTAINERS | 99.760 | 15.2 | 50.504 | 7.7 | 213.280 | 32.51 | 292.601 | 44.59 | 313.040 | 47.71 | 343.105 | 52.29 | 656.145 |
| DRY CARGO/CONTAINERS | 0 | 0.0 | 0 | 0.0 | 14.328 | 10.22 | 125.922 | 89.78 | 14.328 | 10.22 | 125.922 | 89.78 | 140.250 |
| CONTAINERS/RO-RO | 0 | 0.0 | 0 | 0.0 | 6.910 | 100.0 | 0 | 0.0 | 6.910 | 100.0 | 0 | 0.0 | 6.910 |
| OIL TANKERS | 36.148 | 2.85 | 13.062 | 1.03 | 1.119.048 | 88.31 | 98.979 | 7.81 | 1.155.196 | 91.16 | 112.041 | 8.84 | 1.267.237 |
| PRODUCT TANKERS | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 3.260 | 100.0 | 0 | 0.0 | 3.260 | 100.0 | 3.260 |
| CHEMICAL TANKERS | 1.638 | 0.25 | 46.966 | 7.12 | 227.038 | 34.42 | 383.926 | 58.21 | 228.676 | 34.67 | 430.892 | 65.33 | 659.568 |
| VEGATABLE OIL TANKERS | 3.130 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 3.130 | 100.0 | 0 | 0.0 | 3.130 |
| LPG TANKERS | 0 | 0.0 | 0 | 0.0 | 25.868 | 100.0 | 0 | 0.0 | 25.868 | 100.0 | 0 | 0.0 | 25.868 |
| ASPHALT TANKERS | 2.770 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 2.770 | 100.0 | 0 | 0.0 | 2.770 |
| RO-RO SHIPS | 11.636 | 5.74 | 0 | 0.0 | 172.280 | 84.92 | 18.962 | 9.35 | 183.916 | 90.65 | 18.962 | 9.35 | 202.878 |
| RO-RO/PASSERGER | 0 | 0.0 | 1.339 | 4.55 | 22.962 | 78.0 | 5.137 | 17.45 | 22.962 | 78.0 | 6.476 | 22.0 | 29.438 |
| FERRY BOATS | 0 | 0.0 | 0 | 0.0 | 1.790 | 49.32 | 1.839 | 50.68 | 1.790 | 49.32 | 1.839 | 50.68 | 3.629 |
| TRAIN FERRIES | 0 | 0.0 | 3.233 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 3.233 | 100.0 | 3.233 |
| TRAIN FERRIES/RO-RO | 0 | 0.0 | 0 | 0.0 | 6.266 | 100.0 | 0 | 0.0 | 6.266 | 100.0 | 0 | 0.0 | 6.266 |
| PASSENGER AND CARGO SHIPS | 5.076 | 59.89 | 1.700 | 20.06 | 1.700 | 20.06 | 0 | 0.0 | 6.776 | 79.94 | 1.700 | 20.06 | 8.476 |
| HARBOUR CAR FERRIES | 0 | 0.0 | 4.926 | 28.05 | 0 | 0.0 | 12.634 | 71.95 | 0 | 0.0 | 17.560 | 100.0 | 17.560 |
| TUGS | 1.394 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 | 1.394 | 100.0 | 0 | 0.0 | 1.394 |
| SERVICE SHIPS | 2.200 | 12.65 | 8.119 | 46.69 | 4.496 | 25.85 | 2.576 | 14.81 | 6.696 | 38.5 | 10.695 | 61.5 | 17.391 |
| BARGE/FLOATING PONTOON | 0 | 0.0 | 0 | 0.0 | 19.774 | 100.0 | 0 | 0.0 | 19.774 | 100.0 | 0 | 0.0 | 19.774 |
| OTHERS | 2.675 | 36.56 | 0 | 0.0 | 4.641 | 63.44 | 0 | 0.0 | 7.316 | 100.0 | 0 | 0.0 | 7.316 |
| **TOTAL** | 632.783 | 6,68 | 284.351 | 3,0 | 6.298.105 | 66,52 | 2.252.589 | 23,79 | 6.930.888 | 73,2 | 2.536.940 | 26,8 | 9.467.829 |

***Source : Turkish Chamber of Shipping - 2011***

## The Position of The Turkish Merchant Fleet Within the World Fleet

In 2011 our tonnage under foreign flags has reached up to 11.8 billion DWT, as of 1 January 2012, concerning the ships of 1000 Grt and above, the total tonnage of the Turkish shipowners, both under Turkish flag and foreign flags reached 22.5 million DWT.

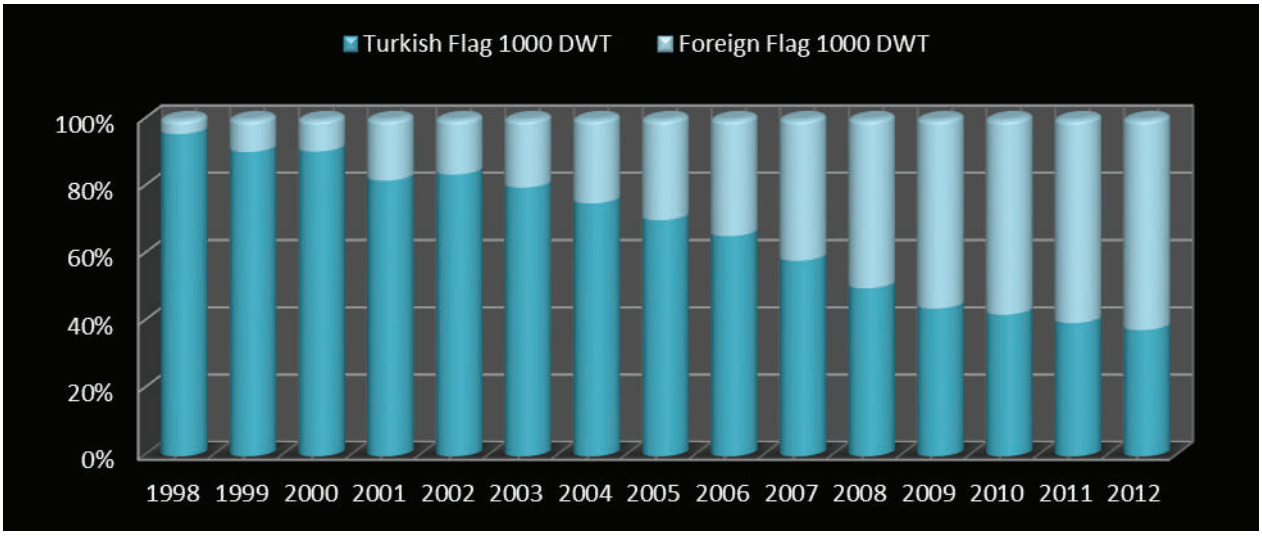
As of the beginning of 2012, regarding the Turkish Ship owners' ships of 1000 GRT and above, 37,6 % percent of these ships are registered under Turkish flag and 62,4 % are registered under foreign flags.

**TABLE (19): Turkish Ships Under the National Flag and Foreign Flags (1.000 Grt and over)**

| | National Flag | | | Foreign Flag | | | Total Fleet Controlled | |
|---|---|---|---|---|---|---|---|---|
| **Years** | **No** | **1000 DWT** | **%** | **No** | **1000 DWT** | **%** | **No** | **1000 DWT** |
| 1998 | 427 | 8,349 | 95,82 | 35 | 364 | 4,18 | 462 | 8,713 |
| 1999 | 448 | 8,697 | 90,48 | 69 | 915 | 9,52 | 517 | 9,612 |
| 2000 | 456 | 8,269 | 90,63 | 96 | 855 | 9,37 | 552 | 9,124 |
| 2001 | 445 | 7,321 | 82 | 107 | 1,607 | 18 | 552 | 8,928 |
| 2002 | 451 | 7,815 | 83,77 | 117 | 1,514 | 16,23 | 568 | 9,329 |
| 2003 | 432 | 7,045 | 79,9 | 147 | 1,772 | 20,1 | 579 | 8,817 |
| 2004 | 408 | 6,556 | 75,23 | 163 | 2,159 | 24,77 | 571 | 8,715 |
| 2005 | 420 | 6,427 | 70,23 | 237 | 2,725 | 29,77 | 657 | 9,152 |
| 2006 | 432 | 6,844 | 65,47 | 353 | 3,609 | 34,53 | 785 | 10,453 |
| 2007 | 446 | 6,464 | 58,16 | 424 | 4650 | 41,84 | 870 | 11,114 |
| 2008 | 490 | 6,592 | 50 | 513 | 6,591 | 50 | 1003 | 13,183 |
| 2009 | 520 | 6,736 | 43,9 | 636 | 8,592 | 56,2 | 1,156 | 15,328 |
| 2010 | 560 | 7,246 | 42,1 | 665 | 9,954 | 57,9 | 1,225 | 17,201 |
| 2011 | 547 | 7.797 | 39,7 | 672 | 11.863 | 60,3 | 1.219 | 19.660 |
| 2012 | 523 | 8.479 | 37,6 | 642 | 14.093 | 62,4 | 1.165 | 22.572 |

***Source : ISL January-February 2012***

### GRAPH (13) : Progress of the Turkish Merchant Fleet



## TABLE ( 20 ) : Total Fleet of the 30 countries by National and Foreign Flags

**(01 January 2012)** ***(1000 GRT and over)***

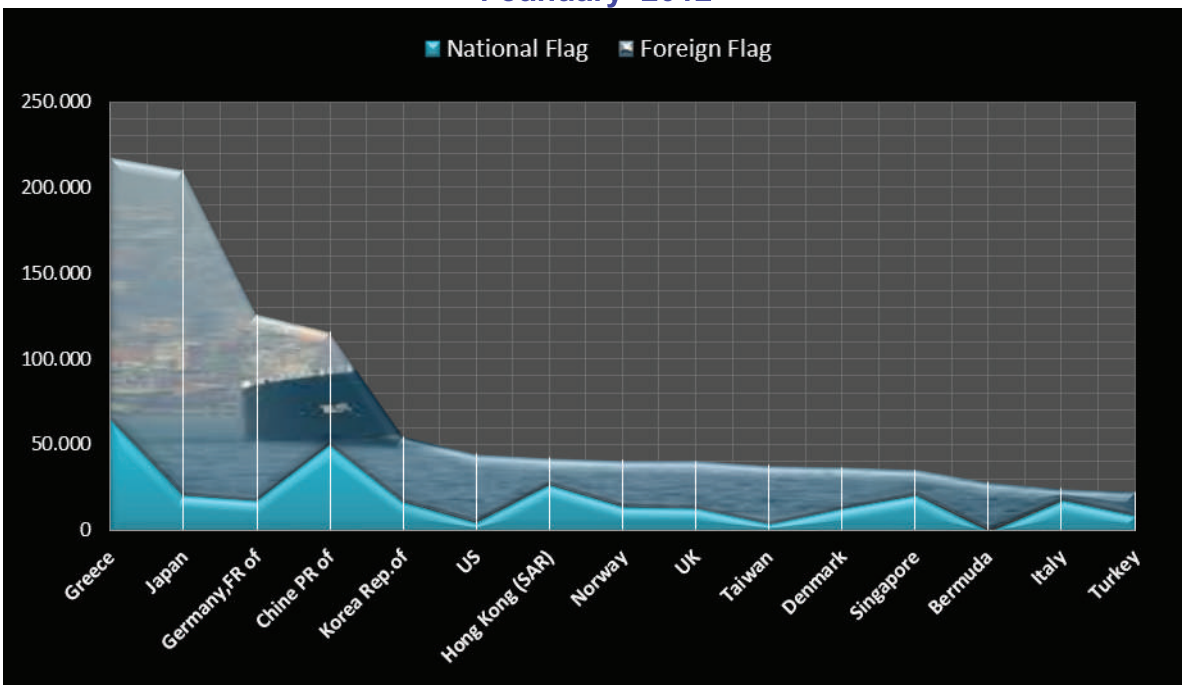
| | | National Flag | | | | Foreign Flag | | | | Total fleet controlled | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **DWT rank** | **Country** | **No** | **1000 dwt** | **1000 TEU** | **Av. Age** | **No** | **1000 dwt** | **1000 TEU** | **Av. Age** | **No** | **1000 dwt** | **1000 TEU** | **Av. Age** |
| 1 | Greece | 737 | 64897 | 207 | 12,4 | 2477 | 152252 | 733 | 11,7 | 3214 | 217149 | 940 | 11,9 |
| 2 | Japan | 633 | 20761 | 11 | 12,1 | 3154 | 189006 | 1229 | 7 | 3787 | 209767 | 1241 | 7,9 |
| 3 | Germany,FR of | 390 | 17495 | 1248 | 11,8 | 3526 | 108001 | 4338 | 8,6 | 3916 | 125496 | 5586 | 8,9 |
| 4 | Chine PR of | 1702 | 50150 | 487 | 18,9 | 1450 | 65461 | 541 | 13,8 | 3152 | 115611 | 1028 | 16,6 |
| 5 | Korea Rep.of | 680 | 17343 | 75 | 16,4 | 471 | 37191 | 375 | 10,5 | 1151 | 54534 | 449 | 14 |
| 6 | US | 201 | 5141 | 147 | 23,9 | 794 | 39330 | 142 | 12,3 | 995 | 44471 | 289 | 14,6 |
| 7 | Hong Kong (SAR) | 433 | 26891 | 211 | 6,5 | 333 | 15542 | 40 | 13,3 | 766 | 42362 | 251 | 9,4 |
| 8 | Norway | 500 | 14361 | 63 | 14,5 | 949 | 26331 | 211 | 14,7 | 1449 | 40647 | 274 | 14,6 |
| 9 | UK | 330 | 13172 | 360 | 9 | 418 | 27108 | 363 | 14,3 | 748 | 40279 | 723 | 12 |
| 10 | Taiwan | 90 | 4214 | 54 | 16,2 | 573 | 33461 | 537 | 10,7 | 663 | 37676 | 591 | 11,4 |
| 11 | Denmark | 327 | 13069 | 591 | 11,1 | 581 | 23721 | 587 | 9,1 | 908 | 36790 | 1178 | 9,8 |
| 12 | Singapore | 534 | 20994 | 323 | 9,1 | 313 | 14159 | 86 | 17,8 | 847 | 35153 | 409 | 12,3 |
| 13 | Bermuda | 12 | 1234 | - | 8,3 | 323 | 26705 | 56 | 12,6 | 244 | 27939 | 56 | 12,3 |
| 14 | Italy | 553 | 18106 | 71 | 12,7 | 202 | 6309 | 41 | 11,6 | 755 | 24415 | 112 | 12,4 |
| **15** | **Turkey** | **523** | **8479** | **76** | **16,5** | **642** | **14093** | **60** | **16,2** | **1165** | **22572** | **136** | **16,3** |
| 16 | India | 294 | 14767 | 23 | 15,2 | 76 | 4625 | 6 | 12,7 | 370 | 19392 | 29 | 14,7 |
| 17 | Russia | 825 | 4486 | 48 | 28 | 410 | 15605 | 40 | 17,5 | 1235 | 19091 | 88 | 24,5 |
| 18 | Canada | 109 | 906 | 7 | 28,9 | 225 | 17596 | 333 | 11 | 334 | 18502 | 341 | 16,9 |
| 19 | Belgium | 65 | 5846 | 2 | 9,9 | 108 | 6741 | 32 | 10 | 173 | 12586 | 35 | 10 |
| 20 | Saudi Arabia | 53 | 1823 | 11 | 20 | 57 | 10510 | 0 | 9,1 | 110 | 12333 | 11 | 14,4 |
| 21 | Malaysia | 249 | 8288 | 60 | 15,1 | 75 | 4006 | 5 | 13,1 | 324 | 12294 | 64 | 14,7 |
| 22 | Indonesia | 890 | 9142 | 104 | 23,7 | 87 | 2439 | 11 | 10,7 | 977 | 11581 | 115 | 22,5 |
| 23 | Brazil | 74 | 2054 | 20 | 21,9 | 40 | 9270 | - | 14,6 | 114 | 11323 | 20 | 19,4 |
| 24 | İran | 44 | 438 | 7 | 16,6 | 69 | 10817 | 7 | 10,1 | 113 | 11255 | 15 | 12,6 |
| 25 | France | 116 | 3213 | 178 | 11,3 | 139 | 6878 | 459 | 10 | 255 | 10091 | 636 | 10,6 |
| 26 | Netherlands | 531 | 5052 | 189 | 9,5 | 194 | 3789 | 31 | 11,9 | 725 | 8840 | 221 | 10,1 |
| 27 | UAE | 35 | 276 | 1 | 14,8 | 241 | 8067 | 31 | 15,9 | 276 | 8342 | 32 | 15,8 |
| 28 | Cyrprus | 58 | 2060 | 11 | 10,4 | 146 | 4742 | 115 | 18,5 | 204 | 6802 | 126 | 16,2 |
| 29 | Kuwait | 35 | 3942 | 21 | 15,1 | 44 | 2736 | 105 | 12,3 | 79 | 6679 | 126 | 13,5 |
| 30 | Viet Nam | 441 | 4662 | 18 | 12,2 | 81 | 2006 | 8 | 23,1 | 522 | 6669 | 27 | 13,9 |
| **Total 30 Countries** | Total 30 Countries | 11464 | 363143 | 4625 | 15,8 | 18107 | 887496 | 10522 | 384,7 | 29571 | 1250639 | 15147 | 12,9 |
| Other | Other | 1903 | 25137 | 197 | 22,1 | 1899 | 52047 | 554 | 18,8 | 3802 | 77184 | 751 | 20,3 |
| **Subtotal** | Subtotal | 13367 | 388280 | 4822 | 16,7 | 20006 | 939544 | 11076 | 11,8 | 33373 | 1327824 | 15898 | 13,8 |
| Unkonwn | Unkonwn | ..... | ..... | ..... | ..... | ..... | ..... | ..... | ..... | 5751 | 126018 | 1756 | 20,6 |
| **World Total** | | | | | | | | | | **39124** | **1.453.842** | **17.654** | **14,8** |

***Source . ISL January/February 2012***

Table 20 shows the first 30 countries which own the largest merchant fleet in the world scale. 86 % of the World fleet ( **1000 Grt and over**) of 1.2 Million DWT, is being controlled by the following countries as of 01 January 2012.

The biggest fleets with open registry flags (1000 GRT and over), in national and foreign flag vessels Greece is on the 1st row, Japan is on the 2nd and Germany is on the 3rd row, whereas Turkey is on the 15th row.

**GRAPH (14) : By Country of Domicile as of 1 January 2012**




The World fleet (300 GRT and over) is 48.197 ships of 1.461.759.000 DWT based on 156 countries as of 01.01.2012. The position of Turkish merchant fleet is shown in the Table as being on 23rd place in World ranking

Panama, having a share of 21.9 % is in the first place, Liberia, having a share of 12.5 % is in the second place, Marshal Island, having a share of 7.9 % is in the third place.

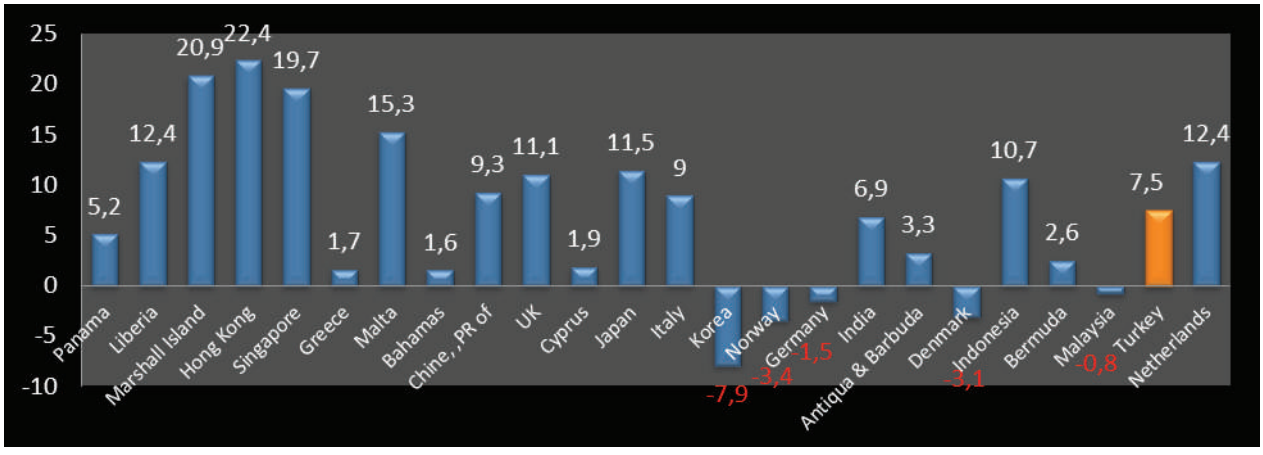
The Turkish fleet range among the World fleets between the years 2004 and 2012 is as follows :

- In 2004, the 23 rd
- In 2005, the 24 th
- In 2006, the 24 th
- In 2007, the 26 th
- In 2008, the 25 th
- In 2009, the 26 th
- In 2010, the 26 th
- In 2011, the 24 th
- In 2012, the 23 rd

## TABLE (21): World Merchant Fleet Ranking by Flag as of January 1st,2012 (300 GRT and over)

| DWT rank | Flag | No of | 1.000 | 1.000 | 1.000 | Dwt % share | % Change |
|---|---|---|---|---|---|---|---|
| 2011 | Flag | Ships | GRT | DWT | TEU | % | % |
| 1 | Panama | 6741 | 208760 | 319704 | 3128 | 21.9 | 5.2 |
| 2 | Liberia | 2865 | 117076 | 182877 | 3558 | 12.5 | 12.4 |
| 3 | Marshall Island | 1677 | 71293 | 115864 | 722 | 7.9 | 20.9 |
| 4 | Hong Kong | 1805 | 67928 | 112801 | 1277 | 7.7 | 22.4 |
| 5 | Singapore | 1765 | 51443 | 78888 | 1037 | 5.4 | 19.7 |
| 6 | Greece | 1074 | 41199 | 72462 | 210 | 5.0 | 1.7 |
| 7 | Malta | 1693 | 43911 | 69848 | 491 | 4.8 | 15.3 |
| 8 | Bahamas | 1182 | 480953 | 62773 | 311 | 4.3 | 1.6 |
| 9 | Chine, ,PR of | 2590 | 35615 | 56131 | 518 | 3.8 | 9.3 |
| 10 | UK | 908 | 29363 | 39641 | 911 | 2.7 | 11.1 |
| 11 | Cyprus | 842 | 20715 | 32799 | 454 | 2.2 | 1.9 |
| 12 | Japan | 2367 | 16523 | 23188 | 16 | 1.6 | 11.5 |
| 13 | Italy | 824 | 18066 | 21271 | 142 | 1.5 | 9.0 |
| 14 | Korea | 1032 | 11501 | 18843 | 78 | 1.3 | - 7.9 |
| 15 | Norway | 845 | 14354 | 18001 | 66 | 1.2 | - 3.4 |
| 16 | Germany | 449 | 15266 | 17604 | 1252 | 1.2 | - 1.5 |
| 17 | India | 456 | 8906 | 15361 | 27 | 1.1 | 6.9 |
| 18 | Antiqua & Barbuda | 1270 | 11080 | 14342 | 844 | 1.0 | 3.3 |
| 19 | Denmark | 447 | 11319 | 13708 | 608 | 0.9 | - 3.1 |
| 20 | Indonesia | 2475 | 9046 | 12827 | 118 | 0.9 | 10.7 |
| 21 | Bermuda | 147 | 10606 | 10369 | 42 | 0.7 | 2.6 |
| 22 | Malaysia | 457 | 7095 | 9549 | 61 | 0.7 | - 0.8 |
| **23** | Turkey | 926 | 6198 | 9294 | 83 | 0.6 | 7.5 |
| 24 | Netherlands | 676 | 7741 | 8699 | 297 | 0.6 | 12.4 |
| 25 | France | 219 | 6373 | 8198 | 178 | 0.6 | 1.2 |
| **World Total** | | **48197** | **977932** | **1461759** | **17666** | **100** | **8.4** |

## GRAPH (15) : World Merchant Fleet Ranking by Flag as of January (300 GRT/over) (01.01.2012)



## The position of the Turkish Merchant Fleet Among the Fleets of the Neighboring Countries

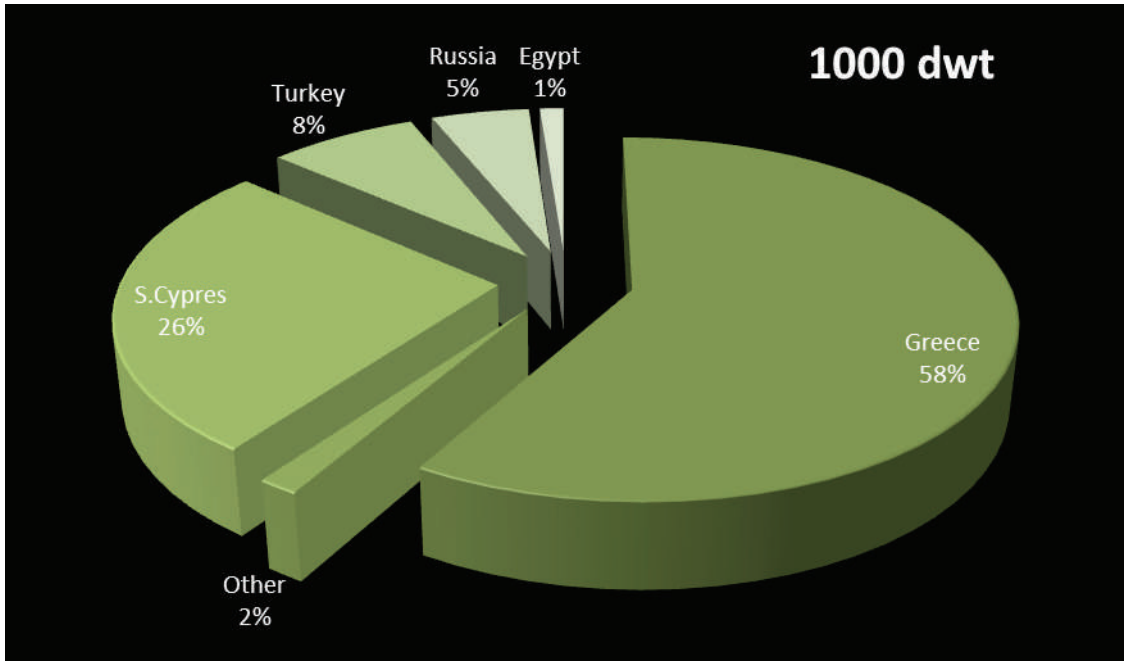
The capacity of the merchant fleet of Turkey and the neighboring countries are shown on the following Table 22. Greece is in the first place being among the first three largest merchant fleets of the World. Southern Cyprus is in the second and Turkey is in the third place.

**TABLE (22) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2012)**
***(300 grt and over)***

| World dwt rank | Country | No | 1000 DWT | World Share % | Change Rate % |
|---|---|---|---|---|---|
| 6 | Greece | 1074 | 72462 | 5,00% | 1,7% |
| 11 | S.Cyprus | 842 | 32799 | 2,20% | 1.90% |
| 23 | Turkey | 926 | 9294 | 0,60% | 7,50% |
| 30 | Russia | 1314 | 6124 | 0,40% | -1.60% |
| 50 | Egypt | 95 | 1485 | 0,10% | 2,30% |
| 66 | Iran | 276 | 714 | 0,00% | -39,40% |
| 75 | Ukrania | 158 | 529 | 0,00% | -21,70% |
| 81 | Bulgaria | 36 | 420 | 0,00% | -32,00% |
| 97 | Syria | 14 | 129 | 0,00% | -51,90% |
| 110 | Romania | 12 | 44 | 0,00% | -72,60% |
| 118 | Iraq | 2 | 27 | 0,00% | - |

***Source : ISL January-February 2012***

**GRAPH (16) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2012)**

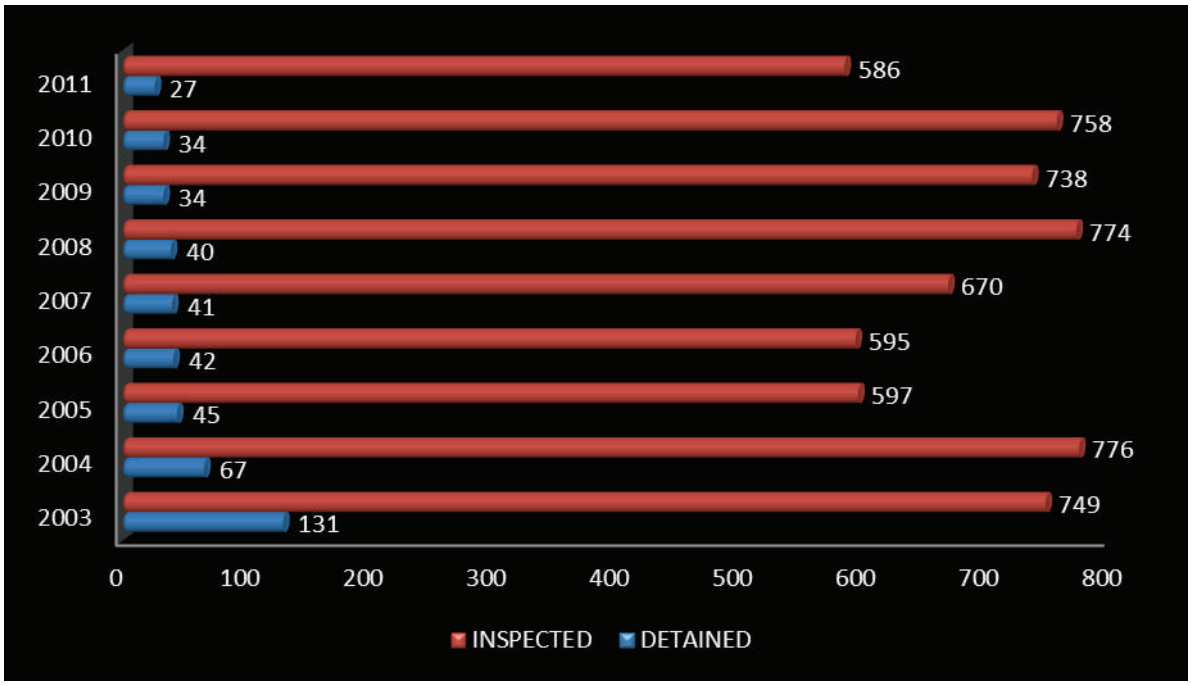


## Port State Control Applications

Turkey is in the White List.

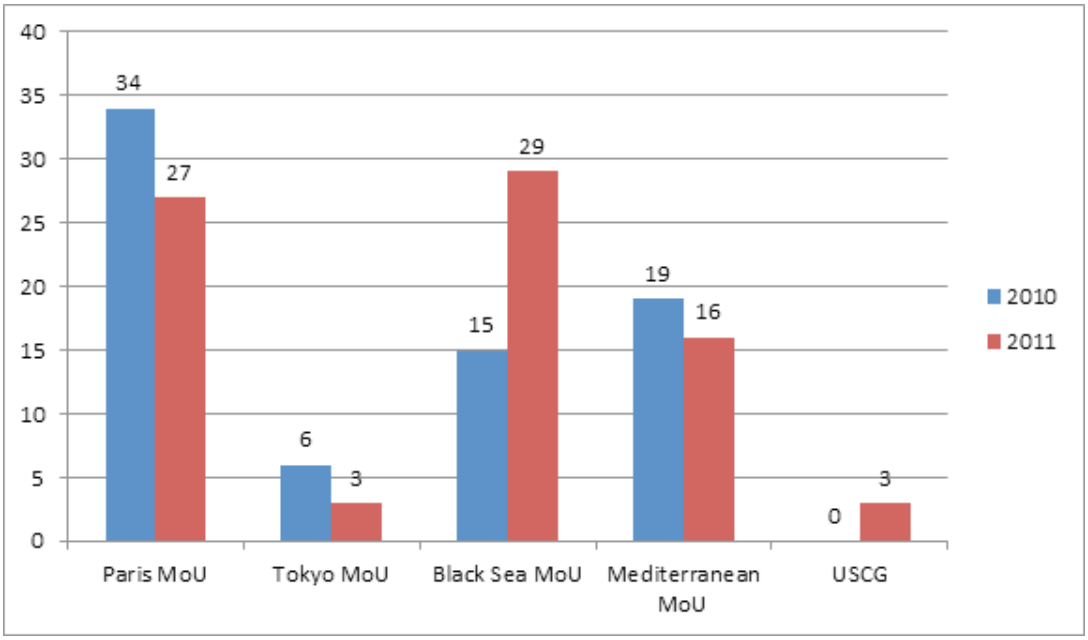
Graph 17 shows monthly detention rates in Paris MoU in year 2011

**GRAPH (17) : Inspected and Detained Ships by Years**




Below there is the graph of comparative monthly detentions in the Tokyo, Mediterranean, Black Sea and Paris MoUs'. Total number of detentions of all 4 MoUs' is 74.

**GRAPH (18) : Monthly Detention Rates in Tokyo, Mediterranean, Black Sea and Paris MoUs' in years 2010 and 2011**






# CARGOES

# CHAPTER II

## DEVELOPMENT OF TONNAGE CARRIED BY TURKISH MERCHANT FLEET IN 2011

### The Developments in the Transportation of Foreign Trade Cargoes

85% of the Turkey's foreign trade is being realised by maritime transportation. The progress of transportation between the years of 2002-2011 is shown in the Table below by the modes of transportation.

**TABLE ( 23 ) : Foreign Trade Transportation by Modes (%)**

| YEARS | SEA | RAIL | ROAD | AIR | OTHER |
|---|---|---|---|---|---|
| 2002 | 87.3 | 0.7 | 9.7 | 0.2 | 2.1 |
| 2003 | 87.6 | 0.8 | 10.5 | 0.1 | 1.0 |
| 2004 | 87.4 | 1.2 | 10.3 | 0.1 | 1.0 |
| 2005 | 86.0 | 1.2 | 11.9 | 0.2 | 0.7 |
| 2006 | 87.4 | 1.1 | 10.4 | 0.1 | 1.0 |
| 2007 | 87.4 | 1.1 | 10.0 | 0.6 | 0.9 |
| 2008 | 86.5 | 1.1 | 10.7 | 0.7 | 1.0 |
| 2009 | 85 | 0.8 | 12.6 | 0.8 | 0.8 |
| 2010 | 85.6 | 0.8 | 12.5 | 0.3 | 0.8 |
| 2011 | 85,8 | 0,8 | 11,8 | 0,4 | 1,2 |

***Source : Turkstat***

85,8% of the volume of Turkey's foreign trade transportation has been carried by sea, 11,8% has been carried by road, 0,8% has been carried by rail, 0,4% has been carried by air, 1,2% has been carried by other transportation modes.

**GRAPH ( 19 ) : Foreign Trade Transportation by Modes (%)**

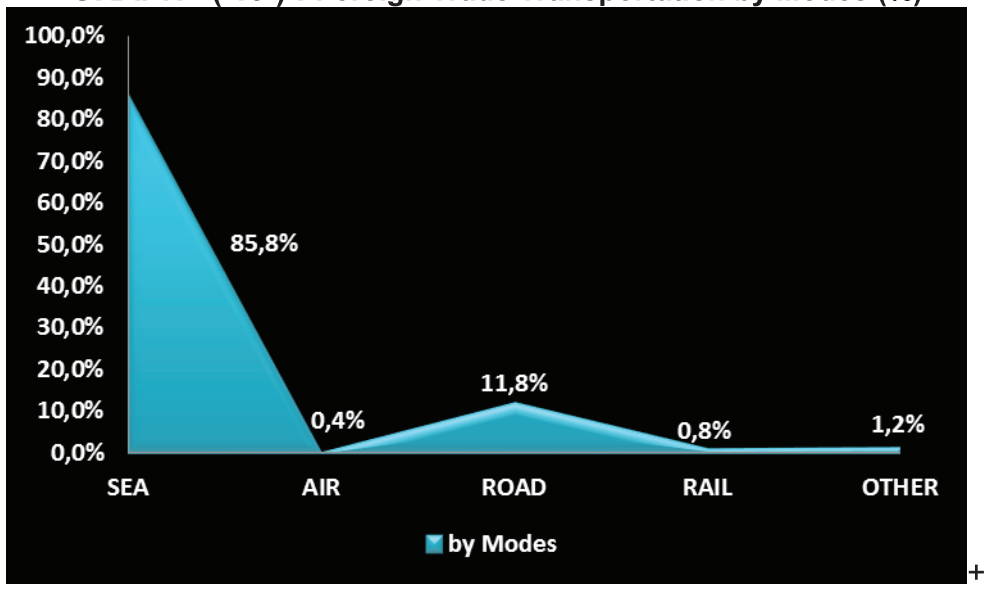


**TABLE ( 24 ) : Foreign Trade Transportation by Modes ($)**

| By Modes | Import $ 2010 | Import $ 2011 | Export $ 2010 | Export $ 2011 | Foreign Trade $ 2010 | Foreign Trade $ 2011 | Change 2010-2011 |
|---|---|---|---|---|---|---|---|
| Sea | 112.567.878.944 | 133.434.323.795 | 58.753.413.786 | 73.621.892.205 | 171.321.292.730 | 207.056.216.000 | 20,85% |
| Rail | 2.454.682.966 | 3.185.490.059 | 992.755.229 | 1.243.108.048 | 3.447.438.195 | 4.428.598.107 | 28,46% |
| Road | 42.433.409.708 | 44.513.837.968 | 45.972.909.642 | 50.253.928.734 | 88.406.319.350 | 94.767.766.702 | 7,19% |
| Air | 17.406.330.448 | 21.515.036.762 | 7.687.672.420 | 8.583.013.431 | 25.094.002.868 | 30.098.050.193 | 19,94% |
| Other | 10.630.556.671 | 38.184.547.780 | 522.863.061 | 1.252.419.153 | 11.153.419.732 | 39.436.966.933 | 253,58% |
| Total | 185.492.858.737 | 240.833.236.364 | 113.929.614.138 | 134.954.361.571 | 299.422.472.875 | 375.787.597.935 | 25,50% |

***Source : Turkstat***

## Developments in the Transportation of Seaborne Trade

The progress of Turkey's seaborne trade has been examined under two headings as maritime cabotage and international transportation in following parts.

### The Number of Incoming Ships to the Turkish Ports

The number of incoming ships to the Turkish ports between the years 2010-2011 is shown below:

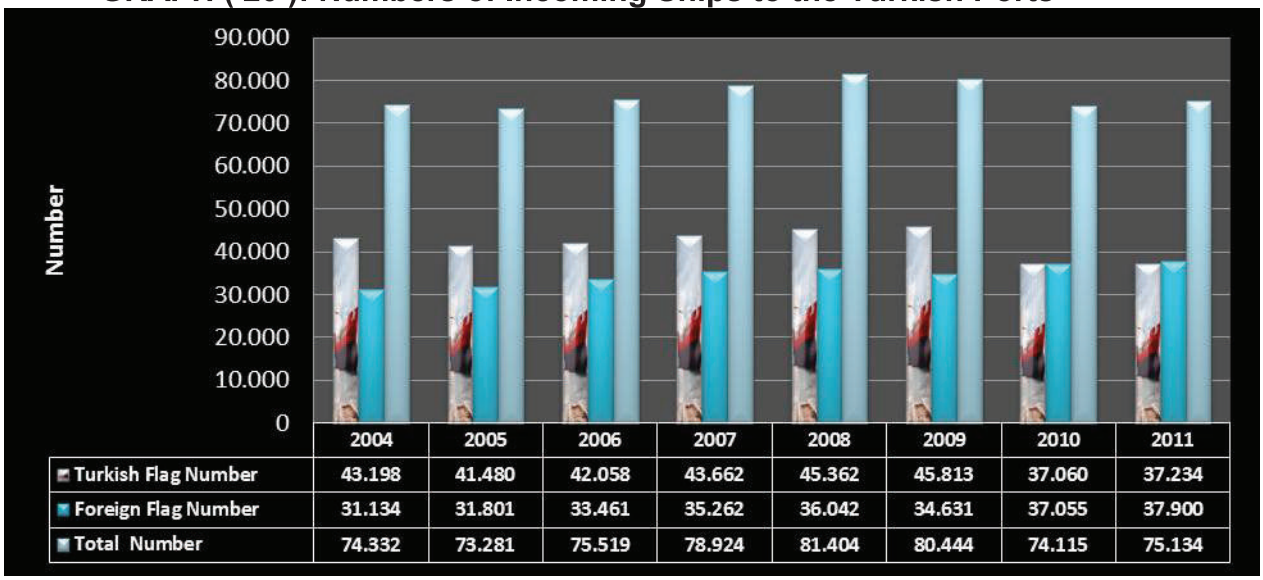
- In 2010, the number of incoming vessels decreased by 7.9% when compared with 2009.
- In 2011, the number of incoming vessels increased by 1.4% when compared with 2010,

**TABLE (25 ): The Number of Incoming Ships to the Turkish Ports**

| | Turkish Flag | Foreign Flag | Total | | |
|---|---|---|---|---|---|
| Years | Number | Number | Number | T/F % | F/F % |
| 2004 | 43.198 | 31.134 | 74.332 | 58,11 | 41,89 |
| 2005 | 41.480 | 31.801 | 73.281 | 56,6 | 43,4 |
| 2006 | 42.058 | 33.461 | 75.519 | 55,69 | 44,31 |
| 2007 | 43.662 | 35.262 | 78.924 | 55,32 | 44,68 |
| 2008 | 45.362 | 36.042 | 81.404 | 55,72 | 44,28 |
| 2009 | 45.813 | 34.631 | 80.444 | 56,95 | 43,05 |
| 2010 | 37.060 | 37.055 | 74.115 | 50 | 50 |
| 2011 | 37.234 | 37.900 | 75.134 | 49,6 | 50,4 |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

**GRAPH ( 20 ): Numbers of Incoming Ships to the Turkish Ports**




| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|---|---|
| Turkish Flag Number | 43.198 | 41.480 | 42.058 | 43.662 | 45.362 | 45.813 | 37.060 | 37.234 |
| Foreign Flag Number | 31.134 | 31.801 | 33.461 | 35.262 | 36.042 | 34.631 | 37.055 | 37.900 |
| Total Number | 74.332 | 73.281 | 75.519 | 78.924 | 81.404 | 80.444 | 74.115 | 75.134 |

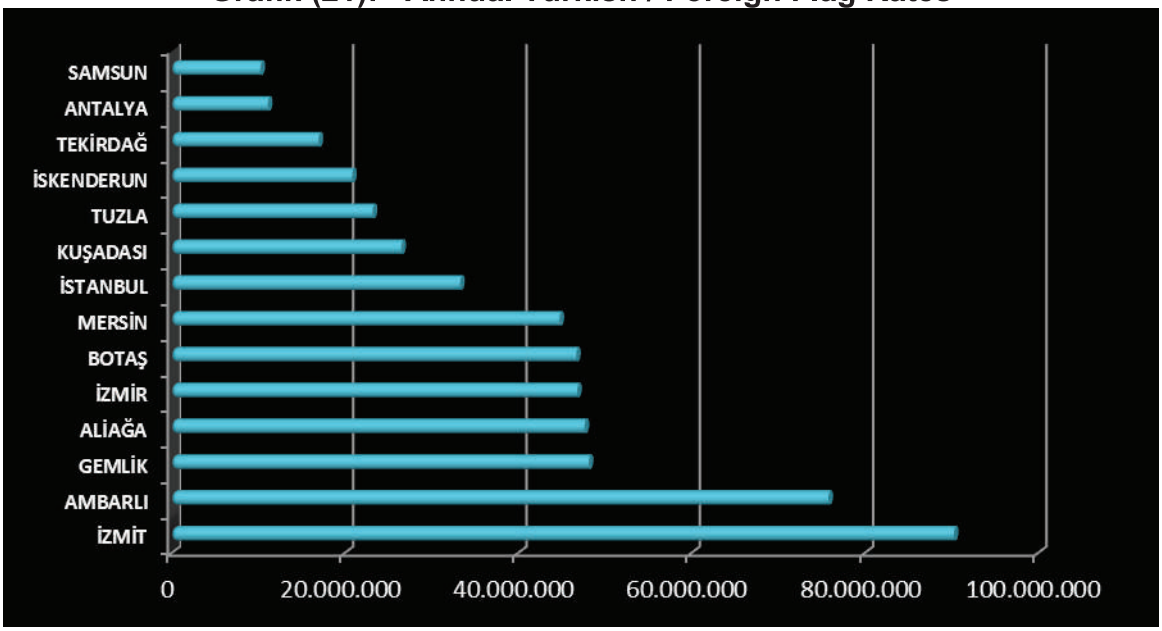
The number of incoming ships to the Turkish ports in monthly basis is shown in the Table 26.

**Tablo (26): Numbers of Incoming Ships to the Turkish Ports in 2011**

| | | Turkish Flag | | Foreign Flag | | Total | |
|---|---|---|---|---|---|---|---|
| Rank | Port | Ship Number | GRT | Ship Number | GRT | Ship Number | GRT |
| 1 | İZMİT | 4.197 | 16.671.769 | 6.362 | 73.592.872 | 10.559 | 90.264.641 |
| 2 | AMBARLI | 2.716 | 16.814.871 | 2.420 | 58.974.441 | 5.136 | 75.789.312 |
| 3 | GEMLİK | 1.321 | 5.998.918 | 2.440 | 42.137.628 | 3.761 | 48.136.546 |
| 4 | ALİAĞA | 1.722 | 9.676.331 | 3.261 | 37.972.934 | 4.983 | 47.649.265 |
| 5 | İZMİR | 743 | 4.657.348 | 1.841 | 42.138.983 | 2.584 | 46.796.331 |
| 6 | BOTAŞ | 132 | 1.758.287 | 1.007 | 44.924.595 | 1.139 | 46.682.882 |
| 7 | MERSİN | 1.183 | 6.990.658 | 2.944 | 37.769.894 | 4.127 | 44.760.552 |
| 8 | İSTANBUL | 1.954 | 2.360.930 | 1.631 | 30.929.777 | 3.585 | 33.290.707 |
| 9 | KUŞADASI | 518 | 87.998 | 753 | 26.418.759 | 1.271 | 26.506.757 |
| 10 | TUZLA | 2.229 | 13.571.969 | 959 | 9.631.926 | 3.188 | 23.203.895 |
| 11 | İSKENDERUN | 1.707 | 3.312.578 | 1.880 | 17.521.857 | 3.587 | 20.834.435 |
| 12 | TEKİRDAĞ | 745 | 1.976.205 | 1.189 | 14.979.552 | 1.934 | 16.955.757 |
| 13 | ANTALYA | 457 | 886.754 | 906 | 10.220.348 | 1.363 | 11.107.102 |
| 14 | SAMSUN | 889 | 2.440.598 | 1.639 | 7.812.284 | 2.528 | 10.252.882 |
| | Other | 16.721 | 18.655.704 | 8.668 | 46.287.074 | 25.389 | 64.942.778 |
| | **TOPLAM** | **37.234** | **105.860.916** | **37.900** | **501.312.925** | **75.134** | **607.173.842** |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

**Grafik (21): Annual Turkish / Foreign Flag Rates**




## Cabotage Transportation

According to the Turkish Maritime Cabotage Law No: 815, the maritime transportation carried out by Turkish ships, being loaded at the harbours and seaports of Turkey and discharged at the harbours and seaports of Turkey, is defined as maritime cabotage.

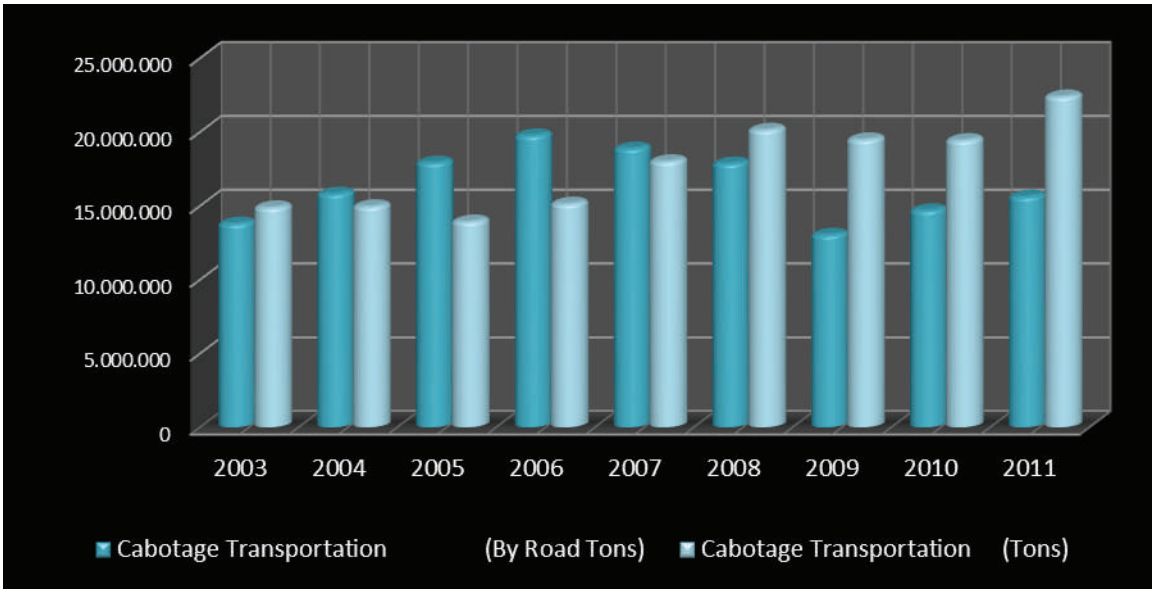
The amounts of cargoes carried by Ferries and carried as bulk and partial cargoes between 2003- 2011 in Turkish ports and wharves on ton basis are at Table 27.

**TABLE (27) : 2003-2011 Cabotage Transportation**

| Years | Cabotage Transportation (By Road Tons) | Cabotage Transportation (Tons) | Total Cabotage (Tons) | Change % |
|---|---|---|---|---|
| 2003 | 13.787.137 | 14.884.389 | 28.671.526 | - |
| 2004 | 15.810.494 | 14.958.778 | 30.769.272 | 7,3 |
| 2005 | 17.911.082 | 13.922.865 | 31.833.947 | 3,5 |
| 2006 | 19.756.679 | 15.133.337 | 34.890.016 | 9,6 |
| 2007 | 18.873.278 | 18.004.619 | 36.877.897 | 5,7 |
| 2008 | 17.856.494 | 20.136.037 | 37.992.531 | 3 |
| 2009 | 13.027.429 | 19.485.900 | 32.513.329 | -14,4 |
| 2010 | 14.686.657 | 19.434.485 | 34.121.142 | 4,9 |
| 2011 | 15.612.213 | 22.389.570 | 38.001.783 | 11,4 |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

**GRAPH (22) : 2003-2011 Cabotage Transportation**




The total cabotage transportation in 2011 is 38.001.783 tons; 15.612.213 tons is carried by Ferries and 22.389.570 tons is carried as bulk and partial cargoes (Table 27). The cabotage transportation increased about 32,5% between the years 2003-2011.

**TABLE (28) 2011 –Cabotage Transportation by the Types of Cargoes**

| By Types | Amount (tons) | Share of total % |
|---|---|---|
| Diesel Oil | 3.451.565 | 15,42% |
| Crude Oil | 1.765.713 | 7,89% |
| Jet Fuel | 1.529.146 | 6,83% |
| Portdland Cement | 1.281.500 | 5,72% |
| Roll Sheet Iron | 1.236.849 | 5,52% |
| Sand | 980.073 | 4,38% |
| Iron | 832.176 | 3,72% |
| Benzoline | 821.427 | 3,67% |
| Structural Iron | 762.334 | 3,40% |
| Container (20 full) | 689.078 | 3,08% |
| Fuel Oil | 652.540 | 2,91% |
| Cinder | 619.424 | 2,77% |
| Other Cement | 614.566 | 2,74% |
| Slap | 577.174 | 2,58% |
| Steel Billets | 523.640 | 2,34% |
| Coke | 519.139 | 2,32% |
| Clay | 495.348 | 2,21% |
| Scrap Iron | 459.580 | 2,05% |
| Container (40 full) | 420.898 | 1,88% |
| Container (20 emply) | 347.425 | 1,55% |
| Other | 3.809.975 | 17,02% |
| Total | 22.389.570 | 100,00% |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

The most significant increase in cabotage transportation is seen in 2006 by 9.6%, the increase in 2004 and 2011 is 7,3% and 11,4% respectively.

Table 28 shows the cabotage transportation by types of cargoes. The first three cargoes are liquid cargoes; diesel oil (15,42%), crude oil (7,89%) and jet fuel (6,83%).

**TABLE (29 ) : 2011 Cabotage Transportation in Ports**

| Rank | Port Authority | Loading | Unloading | Total |
|---|---|---|---|---|
| 1 | İZMİT | 4.548.283 | 2.559.987 | 7.108.270 |
| 2 | AMBARLI | 930.613 | 4.308.077 | 5.238.690 |
| 3 | ALİAĞA | 2.626.308 | 2.271.030 | 4.897.338 |
| 4 | İSKENDERUN | 2.847.869 | 777.309 | 3.625.178 |
| 5 | KDZ EREĞLİ | 989.407 | 2.069.621 | 3.059.028 |
| 6 | BOTAŞ | 1.787.900 | 4.150 | 1.792.050 |
| 7 | KARABİGA | 923.717 | 797.421 | 1.721.138 |
| 8 | TUZLA | 470.271 | 1.091.498 | 1.561.769 |
| 9 | ÇANAKKALE | 1.377.150 | 125.391 | 1.502.541 |
| 10 | MERSİN | 453.339 | 981.167 | 1.434.506 |
| 11 | SAMSUN | 283.990 | 944.765 | 1.228.755 |
| 12 | İSTANBUL | 165.712 | 936.385 | 1.102.097 |
| 13 | TEKİRDAĞ | 417.739 | 658.916 | 1.076.655 |
| 14 | GEMLİK | 356.054 | 692.358 | 1.048.412 |
| 15 | ANTALYA | 36.000 | 792.580 | 828.580 |
| 16 | TRABZON | 379.533 | 410.248 | 789.781 |
| 17 | ÜNYE | 606.063 | 172.370 | 778.433 |
| 18 | RİZE | 17.147 | 730.020 | 747.167 |
| 19 | MARMARA A. | 574.365 | 1.602 | 575.967 |
| 20 | İZMİR | 106.525 | 419.216 | 525.741 |
| 21 | BANDIRMA | 274.521 | 151.745 | 426.266 |
| 22 | TİREBOLU | 1.772 | 349.085 | 350.857 |
| 23 | BARTIN | 142.808 | 189.510 | 332.318 |
| 24 | YALOVA | 45 | 307.620 | 307.665 |
| 25 | ZONGULDAK | 171.155 | 99.261 | 270.416 |
| 26 | SİLİVRİ | 106.120 | 112.200 | 218.320 |
| 27 | İNEBOLU | 200.732 | 13.534 | 214.266 |
| 28 | AMASRA | 196.980 | 900 | 197.880 |
| 29 | HOPA | 105.650 | 60.659 | 166.309 |
| 30 | GÜLLÜK | 149.725 | 3.150 | 152.875 |
| 31 | GÖCEK | 0 | 89.246 | 89.246 |
| 32 | FATSA | 0 | 68.760 | 68.760 |
| 33 | ERDEK | 0 | 40.053 | 40.053 |
| 34 | MARMARİS | 0 | 35.200 | 35.200 |
| 35 | ORDU | 0 | 31.820 | 31.820 |
| 36 | GİRESUN | 4.125 | 20.945 | 25.070 |
| 37 | ÇEŞME | 0 | 24.764 | 24.764 |
| 38 | GELİBOLU | 0 | 14.291 | 14.291 |
| 39 | DİKİLİ | 4.925 | 9.152 | 14.077 |
| 40 | MUDANYA | 650 | 10.902 | 11.552 |
| 41 | FETHİYE | 0 | 5.150 | 5.150 |
| 42 | VAKFIKEBİR | 0 | 3.000 | 3.000 |
| 43 | FOÇA | 0 | 1.550 | 1.550 |
| 44 | BOZCAADA | 0 | 1.108 | 1.108 |
| 45 | KUŞADASI | 0 | 1.046 | 1.046 |
| 46 | ŞİLE | 0 | 480 | 480 |
| 47 | BODRUM | 0 | 328 | 328 |
| | TOTAL | **21.257.193** | **22.389.570** | **43.646.763** |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

In cabotage handling in 2011, İzmit Port (16.3%), Ambarlı Port (12%) and Aliağa Port (11.2%) took the first three place. In cabotage loading, İzmit Port (21.4%), Aliağa Port (12.3%) and İskenderun Port (13.4%) are on the first three places, while in cabotage unloading Ambarlı Port (19.2%), İzmit Port (11.4%) and Aliağa Port (10.1%) are on the top of the list.

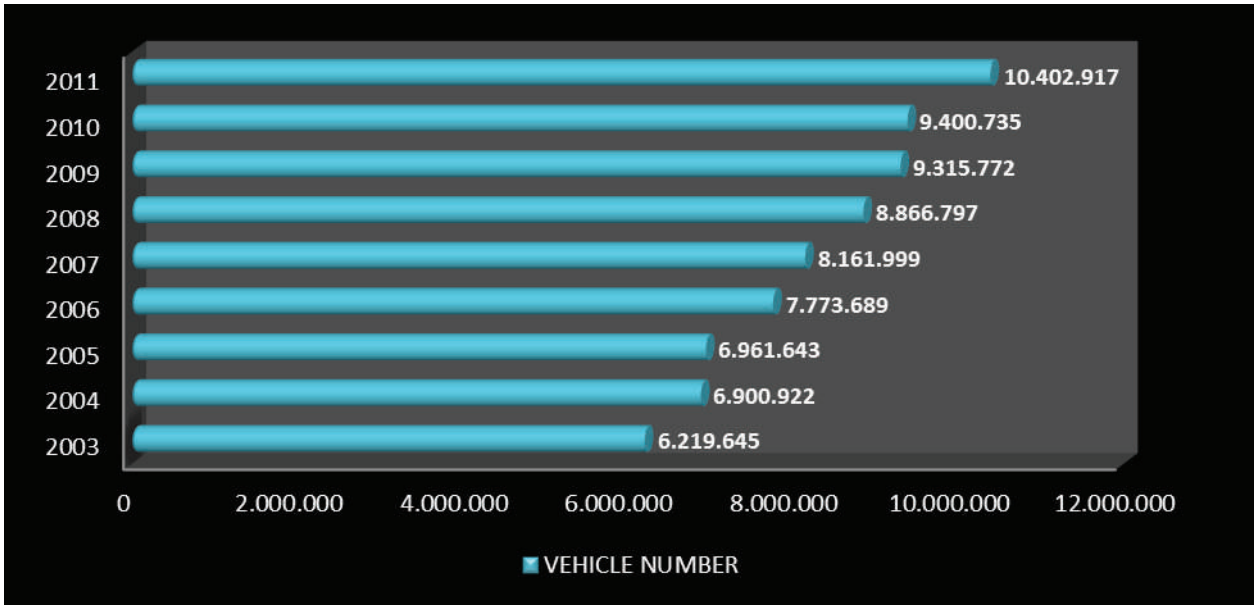
In table 30, the changes in transportation of vehicles in cabotage between the years 2003 and 2011 are being shown. The most significant increase is seen in 2006; with an increase of 11.7% in vehicle numbers and an increase of 22.9% in vehicle / mile. The number of vehicles increased 67.2% in total between 2003 and 2010.

**TABLE (30): 2003-2011 Cabotage Transportation Vehicle Number**

| Years | VEHICLE NUMBER | CHANGE % | VEHICLE NumberXMile | CHANGE % |
|---|---|---|---|---|
| 2003 | 6.219.645 | - | 35.880.927 | - |
| 2004 | 6.900.922 | 10,9 | 40.835.592 | 13,8 |
| 2005 | 6.961.643 | 0,9 | 42.294.836 | 3,6 |
| 2006 | 7.773.689 | 11,7 | 51.978.669 | 22,9 |
| 2007 | 8.161.999 | 5 | 59.942.527 | 15,3 |
| 2008 | 8.866.797 | 8,6 | 82.950.808 | 38,4 |
| 2009 | 9.315.772 | 5,1 | 82.580.396 | -0,4 |
| 2010 | 9.400.735 | 0,9 | 83.607.444 | 1,2 |
| 2011 | 10.402.917 | 10,7 | 83.283.519 | -0,4 |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

**GRAPH (23) : 2003-2011 Cabotage Transportation Vehicle Number**



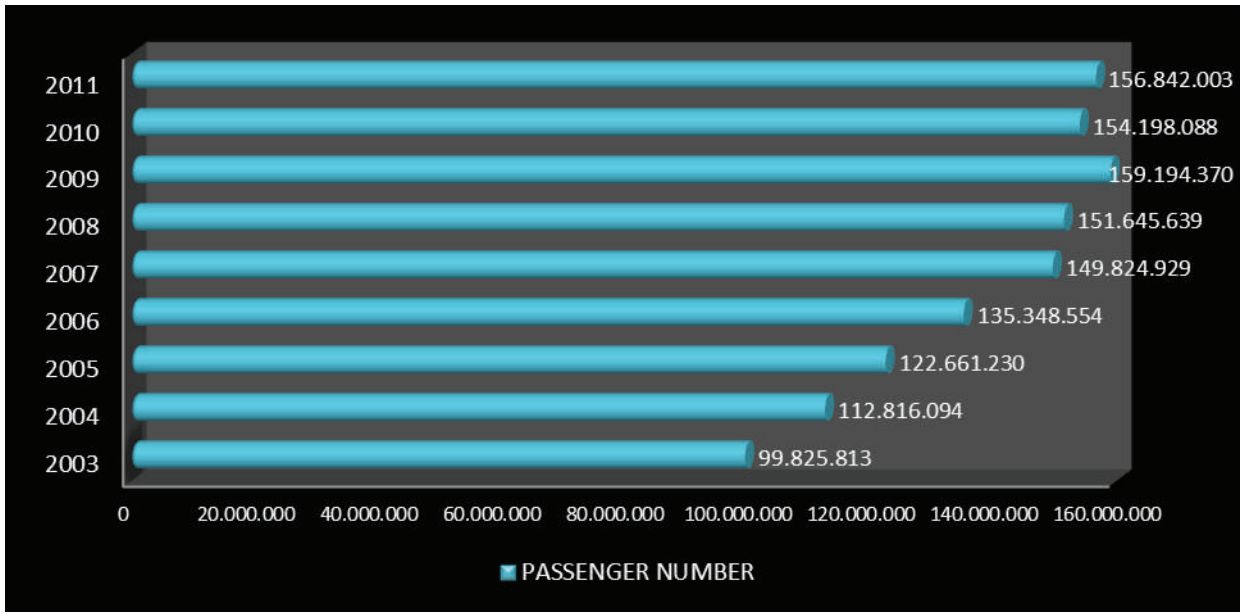
The Table about the numbers of passengers carried in cabotage transportation shows that the biggest increase was in 2004 with 13% and then, in 2007 the increase became 10.7%. In the years 2003-2011 an increase of 57.1 % in passengers' number was realized.

**TABLE ( 31 ) : 2003-2011 Cabotage Transportation Passenger Number**

| Years | PASSENGER NUMBER | CHANGE % | VEHICLE NumberXMile | CHANGE % |
|---|---|---|---|---|
| 2003 | 99.825.813 | - | 550.524.602 | - |
| 2004 | 112.816.094 | 13 | 621.484.444 | 12,9 |
| 2005 | 122.661.230 | 8,7 | 670.751.087 | 7,9 |
| 2006 | 135.348.554 | 10,3 | 752.889.731 | 12,2 |
| 2007 | 149.824.929 | 10,7 | 842.975.355 | 12 |
| 2008 | 151.645.639 | 1,2 | 847.917.253 | 0,6 |
| 2009 | 159.194.370 | 5 | 886.609.389 | 4,6 |
| 2010 | 154.198.088 | -3,1 | 847.715.977 | -4,4 |
| 2011 | 156.842.003 | 1,7 | 854.909.150 | 0,8 |

***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

**GRAPH ( 24 ) : 2003-2010 Cabotage Transportation Passenger Number**



## Developments in International Sea Transportation

International sea transportation includes the transit cargoes belonging to other countries, being loaded and unloaded in the harbours of Turkey, besides export and import goods.

**TABLE ( 32 ) : Development of the Seaborne Trade (2002-2011) Tons**

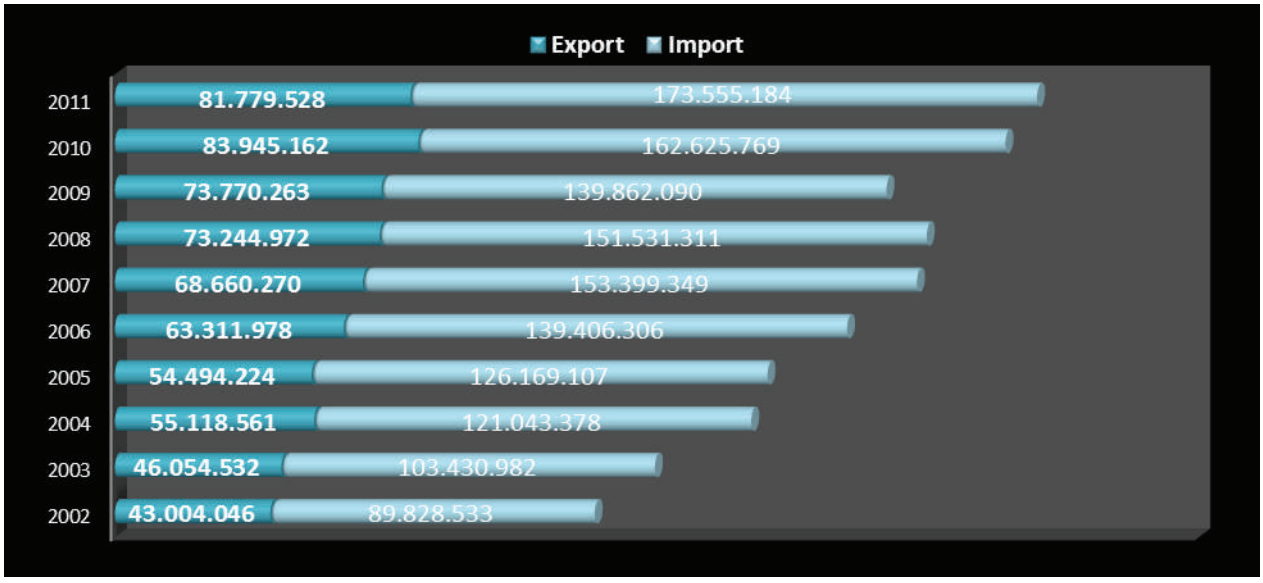
| Years | Total | Export | Import | Turkish Flag | TF % | FF % |
|---|---|---|---|---|---|---|
| 2002 | 132.832.579 | 43.004.046 | 89.828.533 | 44.167.451 | 33 | 67 |
| 2003 | 149.485.514 | 46.054.532 | 103.430.982 | 43.680.964 | 29 | 71 |
| 2004 | 176.161.939 | 55.118.561 | 121.043.378 | 41.905.941 | 24 | 76 |
| 2005 | 180.663.331 | 54.494.224 | 126.169.107 | 42.874.811 | 24 | 76 |
| 2006 | 202.718.284 | 63.311.978 | 139.406.306 | 42.615.725 | 21 | 79 |
| 2007 | 222.059.619 | 68.660.270 | 153.399.349 | 36.992.141 | 17 | 83 |
| 2008 | 224.776.283 | 73.244.972 | 151.531.311 | 31.791.383 | 14 | 86 |
| 2009 | 213.632.353 | 73.770.263 | 139.862.090 | 29.965.566 | 14 | 86 |
| 2010 | 246.570.931 | 83.945.162 | 162.625.769 | 40.494.118 | 16 | 84 |
| 2011 | 255.334.712 | 81.779.528 | 173.555.184 | 42.396.010 | 17 | 83 |

***Source* : Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

In 2011 export shipments decreased to 81.7 million tons, import shipments increased to 173.5 million tons when compared with the previous year. The share of Turkish flag vessels transporting foreign trade cargoes have been realized as 17 % on the average.

As a whole, the share of the Turkish flag vessels transporting foreign trade cargoes between 2002-2011 have been realized as 20.9 % on the average.

**GRAPH ( 25): Development of the Seaborne Trade (Tons)**




The transportation of foreign trade cargoes; 17 % of the import transportation totalling **173.5** million tons have been carried by Turkish flag vessels. 15 % of the export transportation totalling 81.7 million tons have been carried by Turkish flag vessels.

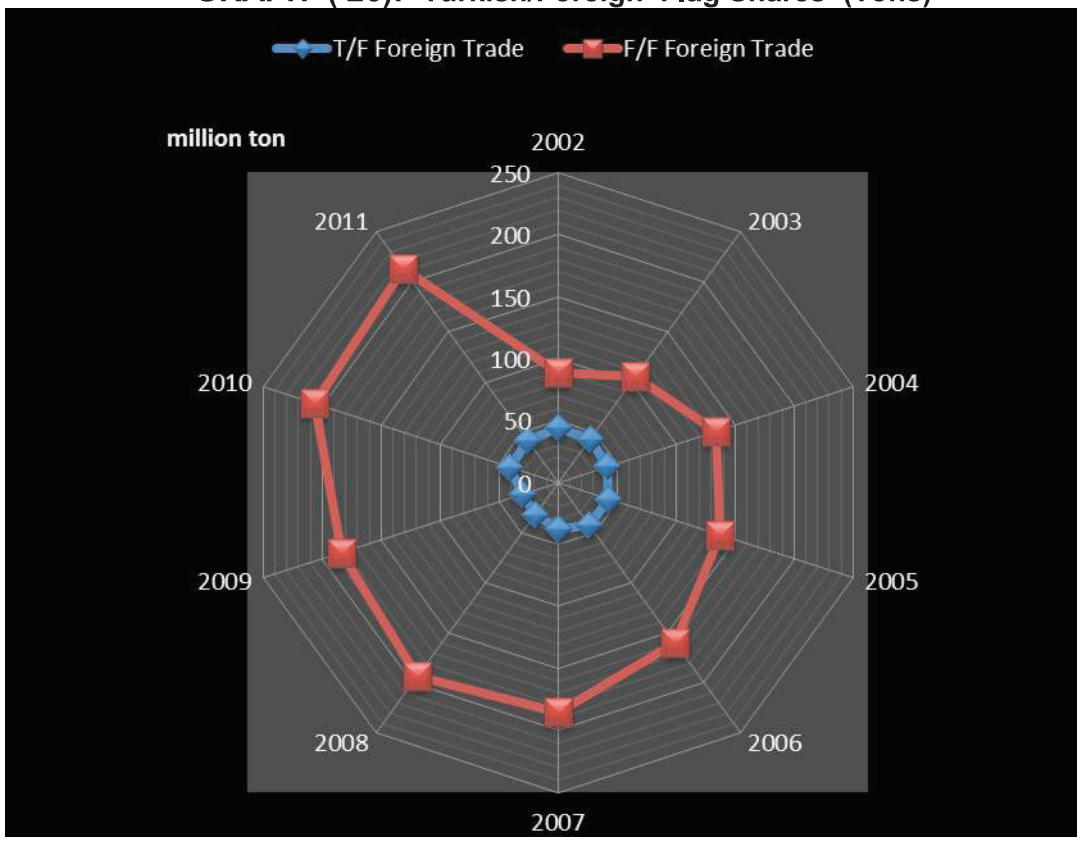
**TABLE ( 33 ) : Foreign Trade Transportation by Flags**

| | Turkish Flag | | | | Foreign Flag | | | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| Years | T/F Import | % | T/F Export | % | F/F Import | % | F/F Export | % | T/F Foreign Trade | F/F Foreign Trade |
| 2002 | 30.562.121 | 34 | 13.605.330 | 32 | 59.266.412 | 66 | 29.398.716 | 68 | 44.167.451 | 88.665.128 |
| 2003 | 30.864.219 | 30 | 12.816.745 | 28 | 72.566.763 | 70 | 33.237.787 | 72 | 43.680.964 | 105.804.550 |
| 2004 | 29.240.528 | 24 | 12.665.413 | 23 | 91.802.850 | 76 | 42.453.148 | 77 | 41.905.941 | 134.255.998 |
| 2005 | 31.577.200 | 25 | 11.297.612 | 21 | 94.591.907 | 75 | 43.196.613 | 79 | 42.874.812 | 137.788.520 |
| 2006 | 32.794.143 | 24 | 9.821.582 | 16 | 106.612.163 | 76 | 53.490.396 | 84 | 42.615.725 | 160.102.559 |
| 2007 | 27.187.904 | 18 | 9.804.237 | 14 | 126.211.445 | 82 | 58.856.033 | 86 | 36.992.141 | 185.067.478 |
| 2008 | 21.136.641 | 14 | 10.654.742 | 15 | 130.394.670 | 86 | 62.590.230 | 85 | 31.791.383 | 192.984.900 |
| 2009 | 20.387.046 | 15 | 9.578.520 | 13 | 119.475.045 | 85 | 64.191.743 | 87 | 29.965.566 | 183.666.788 |
| 2010 | 28.878.432 | 18 | 11.615.686 | 14 | 133.747.337 | 82 | 72.329.476 | 86 | 40.494.118 | 206.076.813 |
| 2011 | 30.122.065 | 17 | 12.273.945 | 15 | 143.433.119 | 83 | 69.505.583 | 85 | 42.396.010 | 212.938.702 |

***Source :*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communications**

The transportation of seaborne foreign trade cargoes increased to 255.3 million tons when compared with 2011 (89 million tons). Import goods increased to 173.5 million tons, (43 million tones) export goods increased to 81 million tons when compared with 2002 with the same period.

**GRAPH ( 26): Turkish/Foreign Flag Shares (Tons)**




The share of Turkish flag vessels, in total foreign trade transportation, in export basis increased to 12.3 million tons and in Import basis increased to 30.1 million tons in 2011.

The share of Foreign flag vessels, in total foreign trade transportation, in export basis increased to 69.5 million tons and in Import basis increased to 143.4 million tons in 2011, when compared with 29.4 and 59,3 million tons in 2002.

The share of Turkish flag ships, in total export transportations increased 5,6 %, import transportations increased 4.3 % in 2011 when compared with previous year.

**GRAPH ( 27 ) : Turkish /Foreign Flag Shares**

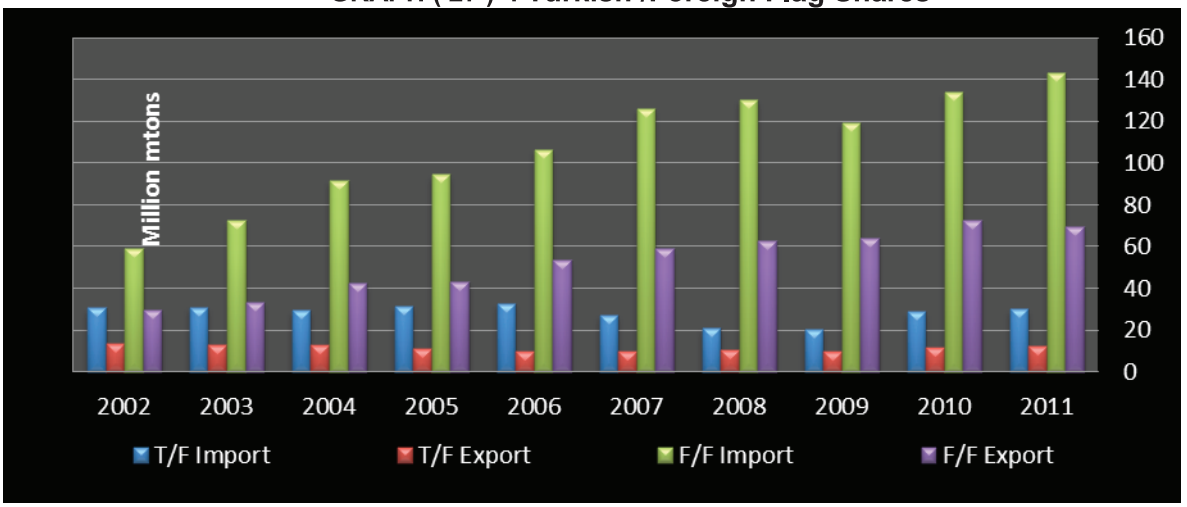



**TABLE ( 34 ) : In Seaborne Exportation, Transportations Made by the Foreign Flag Ships to Their Own Countries, In Quantity / In Value (The first 25 Flags)**

| 2011 Rank | | Flag | mtons | $ |
|---|---|---|---|---|
| 1 | Other Country | Panama | 21.468.499 | 17.871.053.105 |
| | Home Land Des. | Panama | 5.015 | 2.259.480 |
| | | **Total Panama** | **21.473.514** | **17.873.312.585** |
| 2 | Other Country | Malta | 14.096.880 | 9.790.674.415 |
| | Home Land Des | Malta | 61.389 | 43.404.532 |
| | | **Total Malta** | **14.158.269** | **9.834.078.947** |
| 3 | Other Country | Liberia | 11.652.651 | 13.321.616.226 |
| | Home Land Des | Liberia | 112 | 512.117 |
| | | **Total Liberia** | **11.652.763** | **13.322.128.343** |
| 4 | Other Country | Countries terrilorities not determined | 5.697.745 | 6.481.217.850 |
| | Home Land Des | Countries terrilorities not determined | 16 | 37.600 |
| | | **Total Countries terrilorities not determined** | **5.697.761** | **6.481.255.450** |
| 5 | Other Country | Marshall Island | 5.580.287 | 4.524.654.877 |
| | Home Land Des | Marshall Island | 0 | 0 |
| | | **Total Marshall Island** | **5.580.287** | **4.524.654.877** |
| 6 | Other Country | Russia | 827.594 | 509.339.665 |
| | Home Land Des | Russia | 4.261.665 | 1.438.476.630 |
| | | **Total Russia** | **5.089.259** | **1.947.816.295** |
| 7 | Other Country | Italy | 2.664.039 | 4.159.084.556 |
| | Home Land Des | Italy | 1.294.807 | 1.590.629.943 |
| | | **Total Italy** | **3.958.846** | **5.749.714.499** |
| 8 | Other Country | Greece | 3.002.642 | 1.925.167.201 |
| | Home Land Des | Greece | 469.701 | 453.400.262 |
| | | **Total Greece** | **3.472.343** | **2.378.567.463** |

| | | | | |
|---|---|---|---|---|
| 9 | Other Country | Hong Kong | 3.328.296 | 1.641.649.274 |
| | Home Land Des | Hong Kong | 1.010 | 8.467.755 |
| | | **Total Hong Kong** | **3.329.306** | **1.650.117.029** |
| 10 | Other Country | Antigua & Barbuda | 2.858.456 | 4.905.420.656 |
| | Home Land Des | Antigua & Barbuda | 0 | 0 |
| | | **Total Antigua & Barbuda** | **2.858.456** | **4.905.420.656** |
| 11 | Other Country | Cambodia | 2.512.956 | 667.911.629 |
| | Home Land Des | Cambodia | 10.254 | 3.436.232 |
| | | **Total Cambodia** | **2.523.210** | **671.347.861** |
| 12 | Other Country | Colombia | 145.743 | 234.825 |
| | Home Land Des | Colombia | 2.219.774 | 370.631 |
| | | **Total Colombia** | **2.365.517** | **605.456** |
| 13 | Other Country | England | 1.964.477 | 2.541.080.212 |
| | Home Land Des | England | 331.401 | 267.590.624 |
| | | **Total England** | **2.295.878** | **2.808.670.836** |
| 14 | Other Country | Comoro | 1.960.740 | 454.001.507 |
| | Home Land Des | Comoro | 5.959 | 2.343.700 |
| | | **Total Comoro** | **1.966.699** | **456.345.207** |
| 15 | Other Country | Norway | 1.788.636 | 622.024.586 |
| | Home Land Des | Norway | 2.876 | 5.226.418 |
| | | **Total Norway** | **1.791.512** | **627.251.004** |
| 16 | Other Country | Georgia | 1.662.824 | 707.099.375 |
| | Home Land Des | Georgia | 57.156 | 26.281.082 |
| | | **Total Georgia** | **1.719.980** | **733.380.457** |
| 17 | Other Country | Ukrania | 705.048 | 249.137.008 |
| | Home Land Des | Ukrania | 996.186 | 437.266.909 |
| | | **Total Ukrania** | **1.701.234** | **686.403.917** |
| 18 | Other Country | Singapore | 1.635.865 | 2.015.719.974 |
| | Home Land Des | Singapore | 6.298 | 14.865.898 |
| | | **Total Singapore** | **1.642.163** | **2.030.585.872** |
| 19 | Other Country | St.Kitts ve Nevis | 1.522.163 | 363.080.586 |
| | Home Land Des | St.Kitts ve Nevis | 0 | 0 |
| | | **Total St.Kitts ve Nevis** | **1.522.163** | **363.080.586** |
| 20 | Other Country | Bahama | 1.497.845 | 1.347.878.200 |
| | Home Land Des | Bahama | 2.775 | 999.000 |
| | | **Total Bahama** | **1.500.620** | **1.348.877.200** |
| 21 | Other Country | Moldova | 1.432.223 | 451.986.410 |
| | Home Land Des | Moldova | 21.619 | 10.650.190 |
| | | **Total Moldova** | **1.453.842** | **462.636.600** |
| 22 | Other Country | U.S | 163.928 | 244.054.558 |
| | Home Land Des. | U.S. | 1.129.073 | 390.336.350 |
| | | **Total U.S.** | **1.293.001** | **634.390.908** |
| 23 | Other Country | St Vincent | 1.244.418 | 433.098.326 |
| | Home Land Des | St Vincent | 3.737 | 1.251.333 |
| | | **Total St Vincent** | **1.248.155** | **434.349.659** |
| 24 | Other Country | Brazil | 554 | 2.586.405 |
| | Home Land Des | Brazil | 1.118.486 | 222.466.058 |
| | | **Total Brazil** | **1.119.040** | **225.052.463** |
| 25 | Other Country | Holland | 731.293 | 789.656.178 |
| | Home Land Des | Holland | 281.690 | 203.800.382 |
| | | **Total Holland** | **1.012.983** | **993.456.560** |

***Source: Turkstat***

In quantities, except the container transportations, within the maritime transportation of Turkey's exports goods in 2011, Panama Flag Vessels carried 21.5 million tons, Malta Flag Vessels carried 14.1 million tons of cargoes and the Liberia Flag Vessels carried 11.6 million tons of cargoes .

**TABLE ( 35 ) : In Seaborne Importation, Transportations Made by the Foreign Flag Ships to Their Own Countries, In Quantity,In Volume** (The first 25 Flags)

| 2011 Rank | | Flag | mtons | $ |
|---|---|---|---|---|
| 1 | Other Country | Panama | 13.886.371 | 12.506.022.921 |
| | Home Land Des. | Panama | 12.308 | 17.222.344 |
| | | **Total Panama** | **13.898.679** | **12.523.245.265** |
| 2 | Other Country | Liberia | 5.590.876 | 5.767.167.518 |
| | Home Land Des | Liberia | 9.281 | 12.609.017 |
| | | **Total Liberia** | **5.600.157** | **5.779.776.535** |
| 3 | Other Country | Countries terrilorities not determined | 5.334.904 | 4.479.356.816 |
| | Home Land Des | Countries terrilorities not determined | 534 | 960.147 |
| | | **Total Countries terrilorities not determined** | **5.335.438** | **4.480.316.963** |
| 4 | Other Country | Malta | 4.564.885 | 5.149.308.795 |
| | Home Land Des | Malta | 178.771 | 141.075.487 |
| | | Total Malta | **4.743.656** | **5.290.384.282** |
| 5 | Other Country | Marshall Island | 3.664.917 | 4.003.828.914 |
| | Home Land Des | Marshall Island | 2.930 | 17.887.981 |
| | | **Total Marshall Island** | **3.667.847** | **4.021.716.895** |
| 6 | Other Country | Antigua & Barbuda | 2.604.169 | 1.991.917.523 |
| | Home Land Des | Antigua & Barbuda | 744 | 1.119.834 |
| | | **Total Antigua & Barbuda** | **2.604.913** | **1.993.037.357** |
| 7 | Other Country | Italy | 793.531 | 3.187.762.106 |
| | Home Land Des | Italy | 470.810 | 1.457.058.951 |
| | | **Total Italy** | **1.264.341** | **4.644.821.057** |
| 8 | Other Country | Holland | 1.034.669 | 371.736.447 |
| | Home Land Des | Holland | 65.819 | 23.641.917 |
| | | **Total Holland** | **1.100.488** | **395.378.364** |
| 9 | Other Country | Hong Kong | 1.049.925 | 767.844.165 |
| | Home Land Des | Hong Kong | 46.095 | 40.038.998 |
| | | **Total Hong Kong** | **1.096.020** | **807.883.163** |
| 10 | Other Country | Russia | 305.046 | 136.902.619 |
| | Home Land Des | Russia | 785.628 | 235.079.482 |
| | | **Total Russia** | **1.090.674** | **371.982.101** |
| 11 | Other Country | Germany | 1.012.102 | 942.375.003 |
| | Home Land Des | Germany | 74.003 | 117.271.861 |
| | | Total Germany | **1.086.105** | **1.059.646.864** |
| 12 | Other Country | Moldova | 907.538 | 316.012.826 |
| | Home Land Des | Moldova | 1.055 | 1.352.276 |
| | | **Total Moldova** | **908.593** | **317.365.102** |
| 13 | Other Country | Georgia | 827.881 | 331.510.808 |
| | Home Land Des | Georgia | 29.783 | 4.648.359 |
| | | **Total Georgia** | **857.664** | **336.159.167** |
| 14 | Other Country | England | 710.926 | 741.183.040 |
| | Home Land Des | England | 136.727 | 241.236.197 |
| | | **Total England** | **847.653** | **982.419.237** |

| | | | | |
|---|---|---|---|---|
| 15 | Other Country | St Vincent | 834.755 | 294.727.689 |
| | Home Land Des | St Vincent | 1.239 | 1.717.316 |
| | | **Total St Vincent** | **835.994** | **296.445.005** |
| 16 | Other Country | Greece | 672.321 | 437.191.423 |
| | Home Land Des | Greece | 162.722 | 49.747.129 |
| | | **Total Greece** | **835.043** | **486.938.552** |
| 17 | Other Country | Singapore | 714.531 | 1.080.046.046 |
| | Home Land Des | Singapore | 69.539 | 42.982.712 |
| | | **Total Singapore** | **784.070** | **1.123.028.758** |
| 18 | Other Country | Cambodia | 773.833 | 153.905.517 |
| | Home Land Des | Cambodia | 1.800 | 1.087.631 |
| | | **Total Cambodia** | **775.633** | **154.993.148** |
| 19 | Other Country | Tanzaia | 560.151 | 130.465.475 |
| | Home Land Des | Tanzaia | 496 | 375.169 |
| | | **Total Tanzaia** | **560.647** | **130.840.644** |
| 20 | Other Country | Bahama | 545.855 | 751.527.615 |
| | Home Land Des | Bahama | 1.202 | 3.491.691 |
| | | **Total Bahama** | **547.057** | **755.019.306** |
| 21 | Other Country | Sierra Leone | 445.299 | 99.092.781 |
| | Home Land Des | Sierra Leone | 417 | 587.107 |
| | | **Total Sierra Leone** | **445.716** | **99.679.888** |
| 22 | Other Country | Denmark | 426.815 | 342.852.408 |
| | Home Land Des. | Denmark | 10.991 | 6.341.748 |
| | | **Total Denmark** | **437.806** | **349.194.156** |
| 23 | Other Country | Comoro | 386.793 | 86.501.783 |
| | Home Land Des | Comoro | 345 | 719.938 |
| | | **Total Comoro** | **387.138** | **87.221.721** |
| 24 | Other Country | Togo | 352.675 | 59.624.955 |
| | Home Land Des | Togo | 153 | 313.532 |
| | | **Total Togo** | **352.828** | **59.938.487** |
| 25 | Other Country | Belize | 296.898 | 101.599.327 |
| | Home Land Des | Belize | 815 | 2.247.845 |
| | | **Total Belize** | **297.713** | **103.847.172** |

***Source: Turkstat***

Turkey's exports cargoes carried by sea way in the year 2011, the value of Panama Flag Vessels carried cargoes is 17.8 billion US Dollars, Liberia Flag Vessels carried cargoes is 13.3 billion US Dollars, and the Malta Flag Vessels carried cargoes is 9,8 billion US Dollars.

In quantities, except the container transportations, within the maritime transportation of Turkey's import goods in 2011, Panama Flag Vessels carried 13.8 million tons, Liberia Flag Vessels carried 5.6 million tons and the Countries territories not determined Flag Vessels carried 5.3 million tons of cargoes .

In the year 2011, as regards Turkey's imports transportations,the value of Panama Flag Vessels carried cargoes is 12.5 billion US Dollars, Liberia Flag Vessels is 5.8 billion US Dollars and Malta Flag Vessels is 5.2 billion US Dollars.

## Development in Foreign Trade Transportation by Types of Cargoes

The foreign trade cargoes transported by vessels of Turkey according to the types of cargoes are shown in the Table 36 and 37.

The major segments of the exports goods in 2011, which realized totally as 81.7 million tons are 19,39 % Container (20 full), 15.50 % Container (40 full) and 7.60 % Portland Cement. Major segments of the imported goods in 2011, which realized totally as 173 million tons are 12.23 % Scrap Iron, 10.16 % Mineral Coal and 9,01 % Container (40 full).

**TABLE ( 36 ) : Export by the Types of Cargoes 2011**

| Rank | Cargo List | Export mtons | % |
|---|---|---|---|
| 1 | Container (20 full) | 15.855.062 | 19,39 |
| 2 | Container (40 full) | 12.675.328 | 15,50 |
| 3 | Portland Cement | 6.214.560 | 7,60 |
| 4 | Structural Iron | 5.642.945 | 6,90 |
| 5 | Fuel Oil | 5.294.876 | 6,47 |
| 6 | Feldspar | 3.843.605 | 4,70 |
| 7 | Articulate Lorry | 3.695.449 | 4,52 |
| 8 | Benzoline | 2.316.644 | 2,83 |
| 9 | Billet | 2.251.024 | 2,75 |
| 10 | Clinder | 2.249.015 | 2,75 |
| 11 | Roll Sheet Iron | 1.675.334 | 2,05 |
| 12 | Iron Pipe Profile | 1.272.684 | 1,56 |
| 13 | Container (40 emply) | 1.146.923 | 1,40 |
| 14 | Iron and Steel | 1.142.358 | 1,40 |
| 15 | Sodium Bicarboante | 1.128.123 | 1,38 |
| 16 | Marble | 888.617 | 1,09 |
| 17 | Crude Oil | 674.400 | 0,82 |
| 18 | White Cement | 549.738 | 0,67 |
| 19 | Calsit | 486.554 | 0,59 |
| 20 | Stone Chips | 481.136 | 0,59 |
| 21 | Diesel Oil | 477.831 | 0,58 |
| 22 | Building Plaster | 455.301 | 0,56 |
| 23 | Gass Oil | 436.508 | 0,53 |
| 24 | Chrome | 426.481 | 0,52 |
| 25 | Borax | 385.765 | 0,47 |
| | Other | 10.113.267 | 12,37 |
| | **Total** | **81.779.528** | **100,00** |

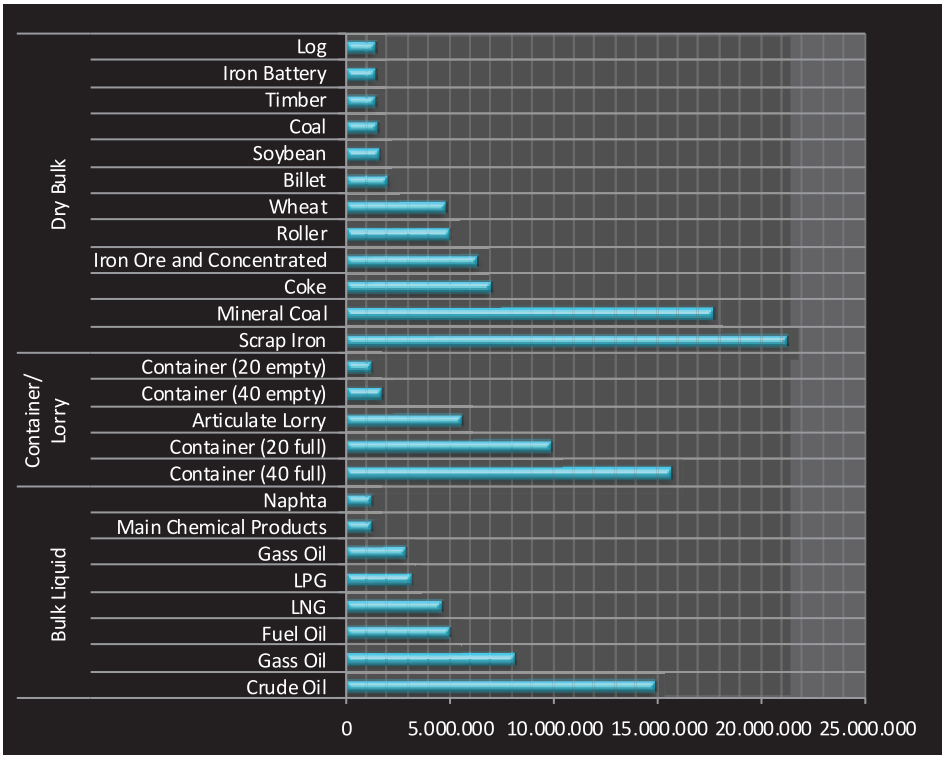
***Source:*** **Republic of Turkey Ministry of Transport, Maritime Affairs and Communication**

## TABLE ( 37 ): Imports by the Types of Cargoes 2011

| Rank | Cargo List | Import mtons | % |
|---|---|---|---|
| 1 | Scrap Iron | 21.220.559 | 12,23 |
| 2 | Mineral Coal | 17.624.841 | 10,16 |
| 3 | Container (40 full) | 15.642.095 | 9,01 |
| 4 | Crude Oil | 14.835.965 | 8,55 |
| 5 | Container (20 full) | 9.854.616 | 5,68 |
| 6 | Gass Oil | 8.124.162 | 4,68 |
| 7 | Coke | 6.942.008 | 4 |
| 8 | Iron Ore and Concentrated | 6.321.600 | 3,64 |
| 9 | Articulate Lorry | 5.537.133 | 3,19 |
| 10 | Fuel Oil | 4.994.321 | 2,88 |
| 11 | Roller | 4.910.667 | 2,83 |
| 12 | Wheat | 4.729.282 | 2,72 |
| 13 | LNG | 4.610.703 | 2,66 |
| 14 | LPG | 3.103.860 | 1,79 |
| 15 | Gass Oil | 2.793.494 | 1,61 |
| 16 | Billet | 1.976.438 | 1,14 |
| 17 | Container (40 empty) | 1.711.017 | 0,99 |
| 18 | Soybean | 1.585.143 | 0,91 |
| 19 | Coal | 1.468.731 | 0,85 |
| 20 | Timber | 1.370.311 | 0,79 |
| 21 | Iron Battery | 1.358.421 | 0,78 |
| 22 | Log | 1.356.239 | 0,78 |
| 23 | Main Chemical Products | 1.243.244 | 0,72 |
| 24 | Naphta | 1.195.634 | 0,69 |
| 25 | Container (20 empty) | 1.193.315 | 0,69 |
| | Other | 27.851.385 | 16,05 |
| | **Total** | **173.555.184** | 100 |

*Source: Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

## GRAPH ( 28 ): Imports by the Types of Cargoes 2011



## The Progress In Seaborne Trade by Country Groups

In the year 2011, 37.6 million tons of export and 66.5 million tons of import, totally 104.1 million tons of transportation have been realized to the OECD countries. Table 38 and 39 shows the export and import values to the OECD countries.

**TABLE ( 38 ) : Seaborne Trade to OECD Countries (2011)(In Quantity)Export**

LOADING

Export

| OECD Country | Turkish Flag | Home Land Flag | Foreign Flag | Total Export | Transit Export | Total Export |
|---|---|---|---|---|---|---|
| Italy | 4.452.104 | 338.403 | 6.862.846 | 11.653.353 | 25.564.526 | 37.217.879 |
| U.S.A. | 85.940 | 0 | 3.559.498 | 3.645.438 | 7.400.287 | 11.045.725 |
| Spain | 1.018.184 | 14.150 | 2.909.786 | 3.942.120 | 2.745.177 | 6.687.297 |
| France | 157.207 | 0 | 1.255.957 | 1.413.164 | 4.818.513 | 6.231.677 |
| Greece | 522.524 | 123.190 | 2.717.847 | 3.363.561 | 1.588.028 | 4.951.589 |
| Belgium | 67.149 | 1.800 | 3.845.107 | 3.914.056 | 306.881 | 4.220.937 |
| Israel | 484.384 | 850 | 2.863.016 | 3.348.250 | 322.061 | 3.670.311 |
| Holland | 71.760 | 150.806 | 656.518 | 879.084 | 2.204.629 | 3.083.713 |
| Romania | 441.839 | 0 | 1.043.896 | 1.485.735 | 319.148 | 1.804.883 |
| Canada | 5.750 | 0 | 149.742 | 155.492 | 1.480.730 | 1.636.222 |
| England | 43.879 | 77.070 | 1.026.876 | 1.147.825 | 180.412 | 1.328.237 |
| S.Korea | 0 | 0 | 518.723 | 518.723 | 566.876 | 1.085.599 |
| Bulgaria | 87.228 | 1.520 | 225.148 | 313.896 | 300.036 | 613.932 |
| Portugal | 23.450 | 0 | 128.457 | 151.907 | 388.513 | 540.420 |
| Germany | 68.136 | 50.070 | 407.245 | 525.451 | 0 | 525.451 |
| Sweden | 0 | 0 | 423.779 | 423.779 | 0 | 423.779 |
| Slovakia | 77.321 | 0 | 165.466 | 242.787 | 0 | 242.787 |
| Poland | 0 | 0 | 223.475 | 223.475 | 0 | 223.475 |
| Denmark | 26.000 | 10.000 | 85.476 | 121.476 | 0 | 121.476 |
| Finland | 0 | 0 | 67.885 | 67.885 | 0 | 67.885 |
| Japan | 0 | 0 | 21.398 | 21.398 | 30.988 | 52.386 |
| Ireland | 6.200 | 0 | 34.819 | 41.019 | 0 | 41.019 |
| Norway | 0 | 0 | 34.796 | 34.796 | 0 | 34.796 |
| Iceland | 0 | 0 | 25.495 | 25.495 | 0 | 25.495 |
| Mexico | 0 | 0 | 5.167 | 5.167 | 0 | 5.167 |
| Hungary | 0 | 0 | 140 | 140 | 0 | 140 |
| Australia | 0 | 0 | 0 | 0 | 0 | 0 |
| S.Cyprus | 0 | 0 | 0 | 0 | 0 | 0 |
| New Zealand | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Virjin Island | 0 | 0 | 0 | 0 | 0 | 0 |
| Austria | 0 | 0 | 0 | 0 | 0 | 0 |
| Czech Republic | 0 | 0 | 0 | 0 | 0 | 0 |
| Switzerland | 0 | 0 | 0 | 0 | 0 | 0 |
| Luxembourg | 0 | 0 | 0 | 0 | 0 | 0 |
| Chile | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **7.639.055** | **767.859** | **29.258.558** | **37.665.472** | **48.216.805** | **85.882.277** |

***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

The first 3 major countries as Turkey's export & transit loading foreign trade partners among OECD countries are Italy with 43.3 %, U.S.A. 12,9 %, Spain 7,8 % shares.

**TABLE ( 39 ) : Seaborne Trade to OECD Countries (2011)(In Quantity)Import**

| | UNLOADING | | | | | |
|---|---|---|---|---|---|---|
| | IMPORT | | | | | |
| OECD Country | Turkish Flag | Home Land Flag | Foreign Flag | Total | Transit Unloading | Total Unloading |
| U.S.A. | 756.990 | 0 | 13.300.314 | 14.057.304 | 17.779 | 14.075.083 |
| Italy | 4.075.222 | 1.295.460 | 4.825.906 | 10.196.588 | 149.065 | 10.345.653 |
| Romania | 2.639.261 | 0 | 3.817.609 | 6.456.870 | 461.393 | 6.918.263 |
| Belgium | 98.285 | 0 | 5.624.204 | 5.722.489 | 379.288 | 6.101.777 |
| Greece | 417.735 | 483.995 | 3.475.409 | 4.377.139 | 115.195 | 4.492.334 |
| Israel | 294.154 | 4.000 | 3.985.438 | 4.283.592 | 15.797 | 4.299.389 |
| Spain | 365.526 | 4.816 | 2.356.772 | 2.727.114 | 329.470 | 3.056.584 |
| Bulgaria | 534.031 | 106.729 | 1.786.695 | 2.427.455 | 282.572 | 2.710.027 |
| England | 166.496 | 46.417 | 2.344.812 | 2.557.725 | 21.847 | 2.579.572 |
| Holland | 122.533 | 136.826 | 2.204.865 | 2.464.224 | 36.708 | 2.500.932 |
| Norway | 0 | 0 | 2.179.902 | 2.179.902 | 22 | 2.179.924 |
| Canada | 0 | 0 | 2.094.676 | 2.094.676 | 0 | 2.094.676 |
| France | 375.346 | 0 | 1.358.818 | 1.734.164 | 47.111 | 1.781.275 |
| Germany | 76.147 | 115 | 1.345.021 | 1.421.283 | 2.217 | 1.423.500 |
| Australia | 0 | 0 | 1.003.929 | 1.003.929 | 0 | 1.003.929 |
| Japan | 31.832 | 0 | 651.974 | 683.806 | 1.511 | 685.317 |
| Finland | 0 | 5.518 | 571.827 | 577.345 | 0 | 577.345 |
| Sweden | 2.306 | 0 | 455.529 | 457.835 | 173 | 458.008 |
| Denmark | 3.574 | 3.992 | 426.081 | 433.647 | 7 | 433.654 |
| S.Korea | 33.316 | 0 | 300.400 | 333.716 | 293 | 334.009 |
| Portugal | 15.101 | 0 | 140.730 | 155.831 | 22.792 | 178.623 |
| Slovakia | 12.293 | 0 | 90.859 | 103.152 | 735 | 103.887 |
| Poland | 4.605 | 0 | 60.365 | 64.970 | 1.005 | 65.975 |
| Mexico | 0 | 0 | 37.696 | 37.696 | 2.779 | 40.475 |
| Ireland | 0 | 0 | 270 | 270 | 0 | 270 |
| S.Cyprus | 0 | 0 | 0 | 0 | 0 | 0 |
| Iceland | 0 | 0 | 0 | 0 | 0 | 0 |
| Hungary | 0 | 0 | 0 | 0 | 0 | 0 |
| New Zealand | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Virjin Island | 0 | 0 | 0 | 0 | 0 | 0 |
| Austria | 0 | 0 | 0 | 0 | 0 | 0 |
| Czech Republic | 0 | 0 | 0 | 0 | 0 | 0 |
| Switzerland | 0 | 0 | 0 | 0 | 0 | 0 |
| Luxembourg | 0 | 0 | 0 | 0 | 0 | 0 |
| Chile | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **10.024.753** | **2.087.868** | **54.440.101** | **66.552.722** | **1.887.759** | **68.440.481** |

***Source:*** ***Republic of Turkey Ministry of Transport, Maritime Affairs and Communications***

Among OECD countries, the first three that Turkey imports from / that conducts transit unloading in Turkey are U.S.A. (20.6%), Italy (15.1%) and Romania (10.1%).

In the year of 2011, the seaborne trade volume between Turkey and the OECD countries was 154.322.758 metric tons. 104.218.194 metric tons of this amount was import –export while 50.104.564 metric tons was transit cargoes.

The seaborne trade share of the Turkish flag vessels was 16.95 % while OECD country flag vessels' share was 2.74% and foreign flag vessels' was 80.31%.

**GRAPH ( 29 ): Seaborne Trade to OECD Countries (2011)**

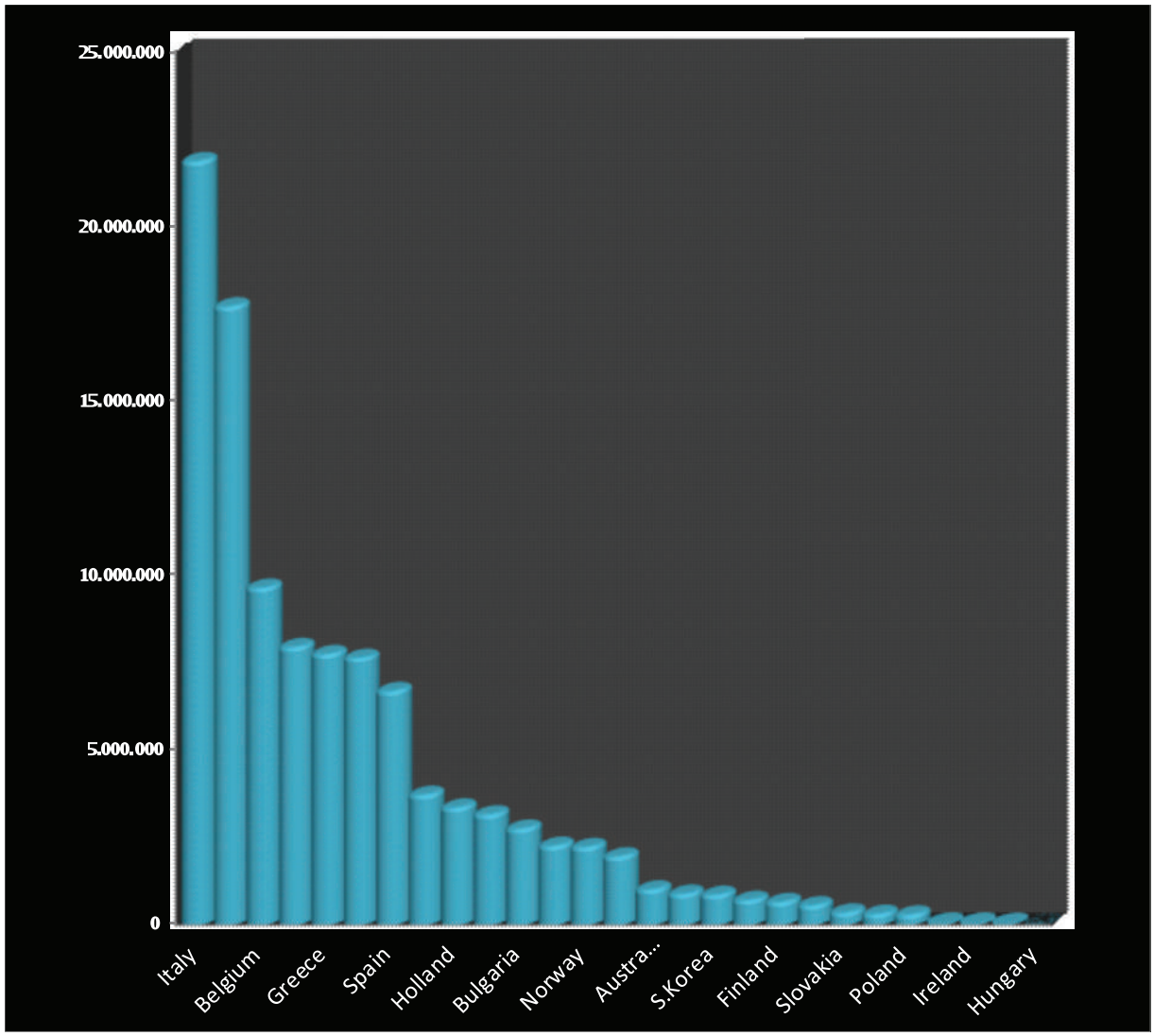


**TABLE ( 40 ): Seaborne Trade to EU Countries (mton)(2011)Export**

LOADING

Export

| OECD Country | Turkish Flag | Home Land Flag | Foreign Flag | Total Export | Transit Export | Total Export |
|---|---|---|---|---|---|---|
| Italy | 4.452.104 | 338.403 | 6.862.846 | 11.653.353 | 25.564.526 | 37.217.879 |
| U.S.A. | 85.940 | 0 | 3.559.498 | 3.645.438 | 7.400.287 | 11.045.725 |
| Spain | 1.018.184 | 14.150 | 2.909.786 | 3.942.120 | 2.745.177 | 6.687.297 |
| France | 157.207 | 0 | 1.255.957 | 1.413.164 | 4.818.513 | 6.231.677 |
| Greece | 522.524 | 123.190 | 2.717.847 | 3.363.561 | 1.588.028 | 4.951.589 |
| Belgium | 67.149 | 1.800 | 3.845.107 | 3.914.056 | 306.881 | 4.220.937 |
| Israel | 484.384 | 850 | 2.863.016 | 3.348.250 | 322.061 | 3.670.311 |
| Holland | 71.760 | 150.806 | 656.518 | 879.084 | 2.204.629 | 3.083.713 |
| Romania | 441.839 | 0 | 1.043.896 | 1.485.735 | 319.148 | 1.804.883 |
| Canada | 5.750 | 0 | 149.742 | 155.492 | 1.480.730 | 1.636.222 |
| England | 43.879 | 77.070 | 1.026.876 | 1.147.825 | 180.412 | 1.328.237 |
| S.Korea | 0 | 0 | 518.723 | 518.723 | 566.876 | 1.085.599 |
| Bulgaria | 87.228 | 1.520 | 225.148 | 313.896 | 300.036 | 613.932 |
| Portugal | 23.450 | 0 | 128.457 | 151.907 | 388.513 | 540.420 |
| Germany | 68.136 | 50.070 | 407.245 | 525.451 | 0 | 525.451 |
| Sweden | 0 | 0 | 423.779 | 423.779 | 0 | 423.779 |
| Slovakia | 77.321 | 0 | 165.466 | 242.787 | 0 | 242.787 |
| Poland | 0 | 0 | 223.475 | 223.475 | 0 | 223.475 |
| Denmark | 26.000 | 10.000 | 85.476 | 121.476 | 0 | 121.476 |
| Finland | 0 | 0 | 67.885 | 67.885 | 0 | 67.885 |
| Japan | 0 | 0 | 21.398 | 21.398 | 30.988 | 52.386 |
| Ireland | 6.200 | 0 | 34.819 | 41.019 | 0 | 41.019 |
| Norway | 0 | 0 | 34.796 | 34.796 | 0 | 34.796 |
| Iceland | 0 | 0 | 25.495 | 25.495 | 0 | 25.495 |
| Mexico | 0 | 0 | 5.167 | 5.167 | 0 | 5.167 |
| Hungary | 0 | 0 | 140 | 140 | 0 | 140 |
| Australia | 0 | 0 | 0 | 0 | 0 | 0 |
| S.Cyprus | 0 | 0 | 0 | 0 | 0 | 0 |
| New Zealand | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Virjin Island | 0 | 0 | 0 | 0 | 0 | 0 |
| Austria | 0 | 0 | 0 | 0 | 0 | 0 |
| Czech Republic | 0 | 0 | 0 | 0 | 0 | 0 |
| Switzerland | 0 | 0 | 0 | 0 | 0 | 0 |
| Luxembourg | 0 | 0 | 0 | 0 | 0 | 0 |
| Chile | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **7.080.830** | **1.432.414** | **23.986.081** | **32.499.325** | **38.547.211** | **71.046.536** |

***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

In the year 2011, 32.4 million tons of export and 45.9 million tons of import, totally 78.3 million tons of seaborne transportation have been realized to the EU countries.

The first 3 major countries as Turkey's export & transit loading foreign trade partners among EU countries are Italy with 43.3 %, U.S.A. with 12.9 %, Spain with 7.8 % shares.

The first 3 major countries as Turkey's import & transit unloading foreign trade partners among EU countries are Italy with 20.6 %, Italy 15.1 % and Romania 10.1 % shares.

**TABLE ( 41 ) : Seaborne Trade to EU Countries ( mton) 2011 IMPORT**

| | UNLOADING | | | | | |
|---|---|---|---|---|---|---|
| | IMPORT | | | | | |
| **OECD Country** | **Turkish Flag** | **Home Land Flag** | **Foreign Flag** | **Total** | **Transit Unloading** | **Total** |
| U.S.A. | 756.990 | 0 | 13.300.314 | 14.057.304 | 17.779 | 14.075.083 |
| Italy | 4.075.222 | 1.295.460 | 4.825.906 | 10.196.588 | 149.065 | 10.345.653 |
| Romania | 2.639.261 | 0 | 3.817.609 | 6.456.870 | 461.393 | 6.918.263 |
| Belgium | 98.285 | 0 | 5.624.204 | 5.722.489 | 379.288 | 6.101.777 |
| Greece | 417.735 | 483.995 | 3.475.409 | 4.377.139 | 115.195 | 4.492.334 |
| Israel | 294.154 | 4.000 | 3.985.438 | 4.283.592 | 15.797 | 4.299.389 |
| Spain | 365.526 | 4.816 | 2.356.772 | 2.727.114 | 329.470 | 3.056.584 |
| Bulgaria | 534.031 | 106.729 | 1.786.695 | 2.427.455 | 282.572 | 2.710.027 |
| England | 166.496 | 46.417 | 2.344.812 | 2.557.725 | 21.847 | 2.579.572 |
| Holland | 122.533 | 136.826 | 2.204.865 | 2.464.224 | 36.708 | 2.500.932 |
| Norway | 0 | 0 | 2.179.902 | 2.179.902 | 22 | 2.179.924 |
| Canada | 0 | 0 | 2.094.676 | 2.094.676 | 0 | 2.094.676 |
| France | 375.346 | 0 | 1.358.818 | 1.734.164 | 47.111 | 1.781.275 |
| Germany | 76.147 | 115 | 1.345.021 | 1.421.283 | 2.217 | 1.423.500 |
| Australia | 0 | 0 | 1.003.929 | 1.003.929 | 0 | 1.003.929 |
| Japan | 31.832 | 0 | 651.974 | 683.806 | 1.511 | 685.317 |
| Finland | 0 | 5.518 | 571.827 | 577.345 | 0 | 577.345 |
| Sweden | 2.306 | 0 | 455.529 | 457.835 | 173 | 458.008 |
| Denmark | 3.574 | 3.992 | 426.081 | 433.647 | 7 | 433.654 |
| S.Korea | 33.316 | 0 | 300.400 | 333.716 | 293 | 334.009 |
| Portugal | 15.101 | 0 | 140.730 | 155.831 | 22.792 | 178.623 |
| Slovakia | 12.293 | 0 | 90.859 | 103.152 | 735 | 103.887 |
| Poland | 4.605 | 0 | 60.365 | 64.970 | 1.005 | 65.975 |
| Mexico | 0 | 0 | 37.696 | 37.696 | 2.779 | 40.475 |
| Ireland | 0 | 0 | 270 | 270 | 0 | 270 |
| S.Cyprus | 0 | 0 | 0 | 0 | 0 | 0 |
| Iceland | 0 | 0 | 0 | 0 | 0 | 0 |
| Hungary | 0 | 0 | 0 | 0 | 0 | 0 |
| New Zealand | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Virjin Island | 0 | 0 | 0 | 0 | 0 | 0 |
| Austria | 0 | 0 | 0 | 0 | 0 | 0 |
| Czech Republic | 0 | 0 | 0 | 0 | 0 | 0 |
| Switzerland | 0 | 0 | 0 | 0 | 0 | 0 |
| Luxembourg | 0 | 0 | 0 | 0 | 0 | 0 |
| Chile | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **9.019.963** | **2.532.879** | **34.428.938** | **45.981.780** | **1.854.896** | **47.836.676** |

***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

In the year 2011, 12.7 million tons of export and 60.5 million tons of import, totally 73.2 million tons seaborne transportation have been realized to the BSEC countries.

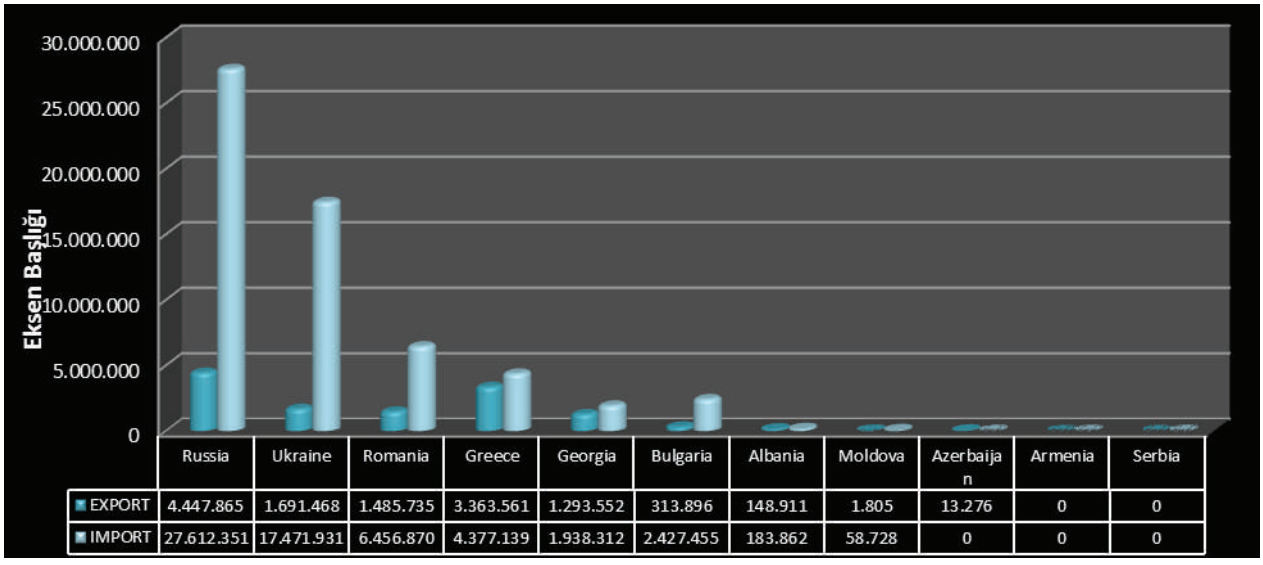
The first 3 major countries as Turkey's export & transit loading foreign trade partners among BSEC countries are Russia with 29.3 %, Greece with 28.2 %, Ukraine with 17.1 % shares.

**TABLE ( 42 ) : Seaborne Trade to BSEC Countries (Tons) Export**

| | LOADING | | | | | |
|---|---|---|---|---|---|---|
| | EXPORT | | | | | |
| **BSEC Country** | **Turkish Flag** | **Home Land Flag** | **Foreign Flag** | **Total** | **Transit Loading** | **Total Loading** |
| Russia | 633.671 | 703.992 | 3.110.202 | 4.447.865 | 688.856 | 5.136.721 |
| Greece | 522.524 | 123.190 | 2.717.847 | 3.363.561 | 1.588.028 | 4.951.589 |
| Ukraine | 293.018 | 178.987 | 1.219.463 | 1.691.468 | 1.303.642 | 2.995.110 |
| Georgia | 712.475 | 15.920 | 565.157 | 1.293.552 | 592.806 | 1.886.358 |
| Romania | 441.839 | 0 | 1.043.896 | 1.485.735 | 319.148 | 1.804.883 |
| Bulgaria | 87.228 | 1.520 | 225.148 | 313.896 | 300.036 | 613.932 |
| Albania | 24.776 | 27.376 | 96.759 | 148.911 | 0 | 148.911 |
| Azerbaijan | 0 | 0 | 13.276 | 13.276 | 0 | 13.276 |
| Moldova | 100 | 0 | 1.705 | 1.805 | 0 | 1.805 |
| Serbia | 0 | 0 | 0 | 0 | 0 | 0 |
| Armenia | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **2.715.631** | **1.050.985** | **8.993.453** | **12.760.069** | **4.792.516** | **17.552.585** |

***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

**GRAPH ( 30) : Seaborne Trade to BSEC Countries ( % ) Export**



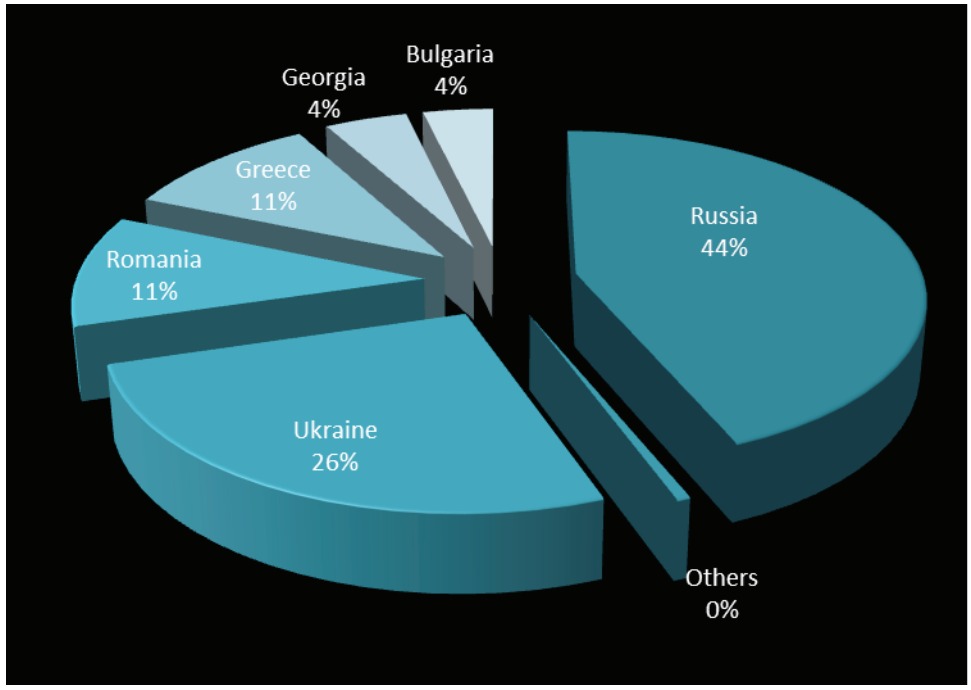

The first 3 major countries as Turkey's import & transit unloading foreign trade partners among BSEC countries are Russia with 46 %, Ukrania with 28.3 % and Romania with 11 % shares.

## TABLE ( 43): Seaborne Trade to BSEC Contries Import

| | UNLOADING | | | | | |
|---|---|---|---|---|---|---|
| | IMPORT | | | | | |
| BSEC Country | Turkish Flag | Home Land Flag | Foreign Flag | Total | Transit Loading | Total Loading |
| Russia | 3.087.036 | 5.322.497 | 19.202.818 | 27.612.351 | 1.120.476 | 28.732.827 |
| Ukraine | 4.292.016 | 867.318 | 12.312.597 | 17.471.931 | 338.064 | 17.809.995 |
| Romania | 2.639.261 | 0 | 3.817.609 | 6.456.870 | 461.393 | 6.918.263 |
| Greece | 417.735 | 483.995 | 3.475.409 | 4.377.139 | 115.195 | 4.492.334 |
| Bulgaria | 534.031 | 106.729 | 1.786.695 | 2.427.455 | 282.572 | 2.710.027 |
| Georgia | 941.696 | 5.567 | 991.049 | 1.938.312 | 140.283 | 2.078.595 |
| Albania | 52.900 | 25.603 | 105.359 | 183.862 | 0 | 183.862 |
| Moldova | 2.749 | 3.053 | 52.926 | 58.728 | 0 | 58.728 |
| Azerbaijan | 0 | 0 | 0 | 0 | 0 | 0 |
| Serbia | 0 | 0 | 0 | 0 | 0 | 0 |
| Armenia | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | **11.967.424** | **6.814.762** | **41.744.462** | **60.526.648** | **2.457.983** | **62.984.631** |

Source: ***Republic of Turkey Ministry of Transport, Maritime Affairs and Communications***

## GRAPH (31): Seaborne Trade to BSEC Countries Foreign Trade



## World Container Fleet by Country of Domicile

The "country of domicile" examination (including container ships of 1.000 GRT and over) show that at the beginning of 2011, 69.3 per cent of the container capacity was not registered in the country of domicile of the owner, but flagged out.

**TABLE (44) : World Full Container Fleet by Country of Domicile** (1000 grt and over)

| | | National Flag | | | | Foreign Flag | | | | Total Fleet Controlled | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TEU Rank | Country | No | 1000 dwt | 1000 TEU | Av. Age | No | 1000 dwt | 1000 TEU | Av. Age | No | 1000 dwt | 1000 TEU | Av. Age |
| 1 | Germany | 291 | 15.429 | 1.205 | 9,4 | 1.485 | 46.891 | 3.603 | 7,7 | 1.716 | 62.321 | 4.808 | 8 |
| 2 | Japan | 2 | 104 | 9 | 8,2 | 320 | 14.929 | 1.187 | 6,4 | 322 | 15.032 | 1.197 | 6,4 |
| 3 | Denmark | 89 | 7.062 | 499 | 9,5 | 135 | 7.058 | 512 | 8,7 | 224 | 14.120 | 1.010 | 9 |
| 4 | Chine | 184 | 5.749 | 415 | 14,9 | 148 | 4.597 | 354 | 12,4 | 332 | 10.346 | 770 | 13,8 |
| 5 | Greece | 31 | 2.269 | 178 | 12,8 | 180 | 7.305 | 549 | 41,1 | 211 | 9.574 | 727 | 13,9 |
| 6 | Taiwan | 26 | 712 | 52 | 14,1 | 157 | 6.348 | 504 | 9,6 | 183 | 7.061 | 556 | 10,3 |
| 7 | France | 24 | 1.932 | 159 | 4,8 | 77 | 4.352 | 350 | 6,7 | 101 | 6.283 | 509 | 6,3 |
| 8 | Korea Rep.Of | 69 | 923 | 63 | 14 | 65 | 3754 | 293 | 7,5 | 134 | 4.676 | 356 | 10,9 |
| 9 | UK | 31 | 1845 | 151 | 6,9 | 38 | 2.400 | 203 | 8 | 69 | 4.244 | 355 | 7,5 |
| 10 | Singapore | 128 | 3.815 | 276 | 9,2 | 28 | 920 | 69 | 10,4 | 156 | 4.735 | 345 | 9,4 |
| 11 | Canada | 2 | 17 | 1 | 22,6 | 54 | 3174 | 260 | 4,7 | 56 | 3.191 | 261 | 5,3 |
| 12 | US | 49 | 1865 | 141 | 24 | 35 | 1.193 | 88 | 11,9 | 84 | 3.058 | 229 | 19 |
| 13 | Isreal | 6 | 377 | 27 | 9,7 | 34 | 2.043 | 157 | 8,8 | 40 | 2.420 | 185 | 8,9 |
| 14 | Hong Kong | 41 | 2.113 | 172 | 5,7 | 9 | 158 | 11 | 11,3 | 50 | 2.270 | 183 | 6,7 |
| 15 | Kuwait | 6 | 292 | 21 | 18,3 | 21 | 1.205 | 90 | 13,5 | 27 | 1.497 | 110 | 14,5 |
| 16 | S. Cyprus | 7 | 215 | 16 | 6,5 | 28 | 867 | 64 | 6,3 | 35 | 1.082 | 79 | 6,4 |
| 17 | Turkey | 38 | 616 | 45 | 10,2 | 24 | 328 | 26 | 8,6 | 62 | 944 | 71 | 9,6 |
| 18 | Malaysia | 40 | 804 | 55 | 16,6 | 6 | 75 | 5 | 14,2 | 46 | 879 | 60 | 16,3 |
| 19 | Indonesia | 93 | 781 | 47 | 19,1 | 5 | 110 | 7 | 15,4 | 98 | 891 | 54 | 18,9 |
| 20 | Chile | 1 | 21 | 2 | 11,2 | 10 | 628 | 50 | 4,7 | 11 | 649 | 52 | 5,3 |
| **World** | **Total** | | | | | | | | | **4.845** | **183.671** | **14.066** | **30.7** |

***Source : ISL May/June 2011***

As regards the owner countries, German ship owners controlled by far the largest part of the world container fleet, namely 4.8 mill. TEU (1.716 container vessels) followed by Japan 1.2 mill TEU (322 container vessel) and Denmark 1.0 mill TEU (224 container vessels).

Container handling in Turkey in the years 2002 and 2011 are shown in Table 45 below on the basis of public and private sectors.

When the container transportations in 2010 is examined as cabotage, exports, imports and transit cargoes; on the basis of TEU, exports became 2.6 million TEU, imports 2.7 million TEU, cabotage loading-unloading 459.594 TEU and transit 757.171 TEU.

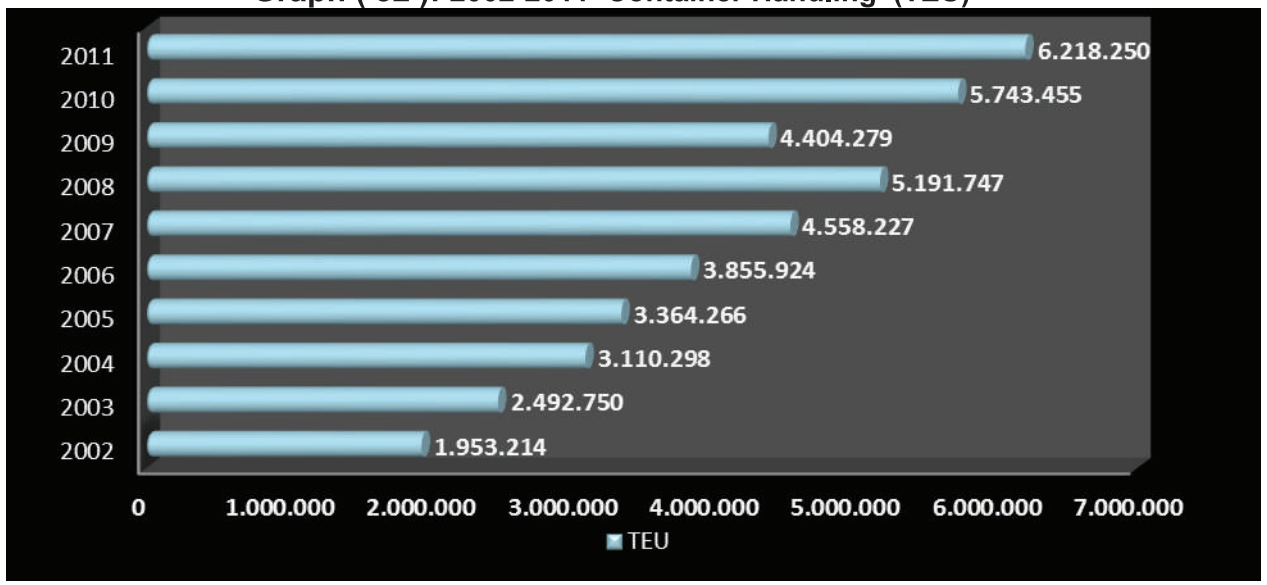
Transportation volume of Turkey's container transports by sea way was 1,9 million TEU in 2000; in 2011 it became 6.2 million TEU, at the same period imports cargoes increased to 2.7million TEU from 928.257 TEU and the exports cargoes increased to 2.6 million TEU when compared with 942.643 TEU in 2002.

## TABLE ( 45 ) : Container Handling 2002-2011 (TEU)

| | Loading (TEU) | | | Unloading (TEU) | | | Foreign | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Years | Cabotage | Export | Total | Cabotage | Import | Total | Trade | Transit | Total | Change % |
| 2002 | 46,33 | 942,643 | 988,973 | 35,984 | 928,257 | 964,241 | 1.953.214 | 0 | 1.953.214 | 111.3% |
| 2003 | 58,766 | 1.174.016 | 1.232.782 | 39,072 | 1.110.670 | 1.149.742 | 2.382.524 | 110,226 | 2.492.750 | 27.6% |
| 2004 | 20,682 | 1.490.066 | 1.510.748 | 13,334 | 1.409.945 | 1.423.279 | 2.934.027 | 176,271 | 3.110.298 | 24.7% |
| 2005 | 6,579 | 1.598.450 | 1.605.029 | 8,167 | 1.577.932 | 1.586.099 | 3.191.128 | 173,138 | 3.364.266 | 8.2% |
| 2006 | 14,008 | 1.809.433 | 1.823.441 | 6,913 | 1.840.649 | 1.847.562 | 3.671.003 | 184,921 | 3.855.924 | 14.6% |
| 2007 | 34,005 | 2.152.014 | 2.186.019 | 27,128 | 2.224.653 | 2.251.781 | 4.437.800 | 120,427 | 4.558.227 | 18.2% |
| 2008 | 86,867 | 2.429.820 | 2.516.687 | 82,934 | 2.474.773 | 2.557.707 | 5.074.394 | 117,353 | 5.191.747 | 13.9% |
| 2009 | 70,329 | 2.131.948 | 2.202.277 | 71,696 | 2.117.764 | 2.189.460 | 4.391.737 | 12,542 | 4.404.279 | - 15.2% |
| 2010 | 104,278 | 2.306.587 | 2.410.865 | 104,047 | 2.354.304 | 2.458.351 | 4.869.216 | 874,239 | 5.743.455 | 30,40% |
| **2011** | **154.338** | **2.690.889** | **2.845.227** | **305.256** | **2.770.190** | **3.075.446** | **5.461.079** | **757.171** | **6.218.250** | **8,3%** |

***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

**Graph ( 32 ): 2002-2011 Container Handling (TEU)**



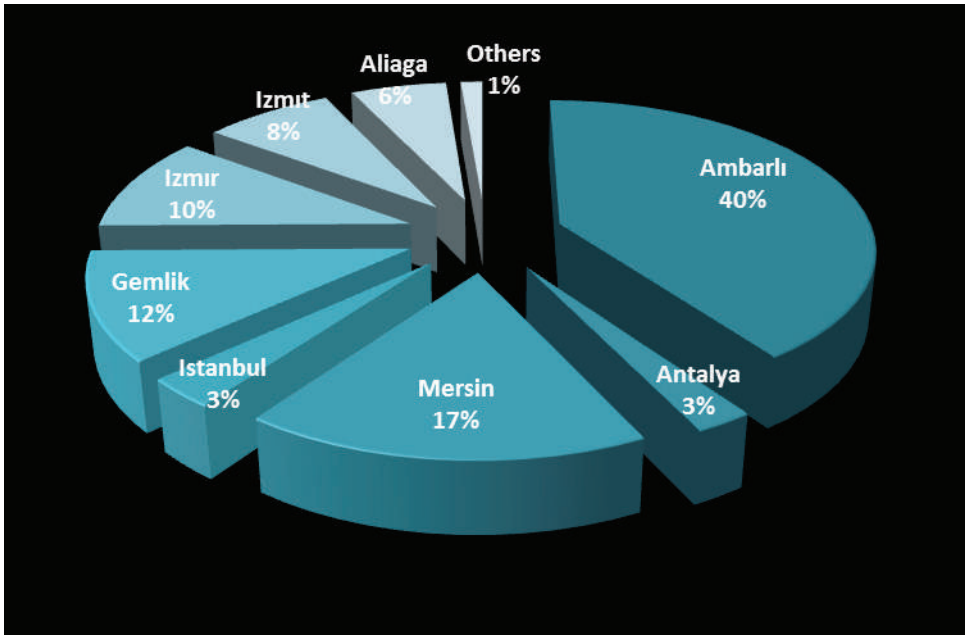

According to the 2010 container loading and unloading / handling (TEU) chart of the Harbour Masters, in the ports operating under Ambarlı Harbour Master handled an amount of 2.624.711 TEU, the ports operating under Mersin Harbour Master handled a sum of 1.126.866 TEU and in the ports operating under Gemlik Harbour Master handled a total of 757.128 TEU of containers.

**TABLE ( 46) : Position at the 17 Ports- Container Handling (TEU) 2011**

| | LOADING | | | | UNLOADING | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Port Authority | Export | Cabotage | Transit | Total | Import | Cabotage | Transit | Total | General Total |
| AMBARLI | 835.320 | 64.750 | 386.159 | 1.286.229 | 938.764 | 45.855 | 353.863 | 1.338.482 | 2.624.711 |
| MERSİN | 539.928 | 17.616 | 346 | 557.890 | 538.505 | 22.382 | 8.089 | 568.976 | 1.126.866 |
| GEMLİK | 363.397 | 14.170 | 22 | 377.589 | 358.836 | 20.557 | 146 | 379.539 | 757.128 |
| İZMİR | 323.535 | 7.945 | 0 | 331.480 | 315.098 | 25.908 | 0 | 341.006 | 672.486 |
| İZMİT | 244.495 | 13.401 | 0 | 257.896 | 245.610 | 4.327 | 4 | 249.941 | 507.837 |
| ALİAĞA | 192.100 | 4.412 | 4.207 | 200.719 | 152.290 | 19.956 | 4.183 | 176.429 | 377.147 |
| İSTANBUL | 88.831 | 10.569 | 0 | 99.400 | 105.183 | 1.499 | 0 | 106.682 | 206.082 |
| ANTALYA | 83.062 | 0 | 64 | 83.126 | 82.348 | 0 | 0 | 82.348 | 165.474 |
| TRABZON | 3.914 | 16.342 | 0 | 20.256 | 14.528 | 5.467 | 0 | 19.995 | 40.251 |
| İSKENDERUN | 12.074 | 0 | 0 | 12.074 | 13.393 | 9 | 88 | 13.490 | 25.564 |
| TEKİRDAĞ | 3.532 | 341 | 0 | 3.873 | 2.546 | 1.756 | 0 | 4.302 | 8.175 |
| SAMSUN | 61 | 3.279 | 0 | 3.340 | 3.089 | 1.007 | 0 | 4.096 | 7.436 |
| BANDIRMA | 0 | 968 | 0 | 968 | 0 | 1.080 | 0 | 1.080 | 2.048 |
| KARABİGA | 629 | 325 | 0 | 954 | 0 | 900 | 0 | 900 | 1.854 |
| RİZE | 0 | 215 | 0 | 215 | 0 | 215 | 0 | 215 | 430 |
| BARTIN | 11 | 0 | 0 | 11 | 0 | 0 | 0 | 0 | 11 |
| KDZ.EREĞLİSİ | 0 | 5 | 0 | 5 | 0 | 0 | 0 | 0 | 5 |
| **TOPLAM** | **2.690.889** | **154.338** | **390.798** | **3.236.025** | **2.770.190** | **150.918** | **366.373** | **3.287.481** | **6.523.506** |

***Source: Republic of Turkey Ministry of Transport, Maritime Affairs and Communications***

**Graph ( 33) : Position at the 8 Ports Container Handling (TEU %) 2011**



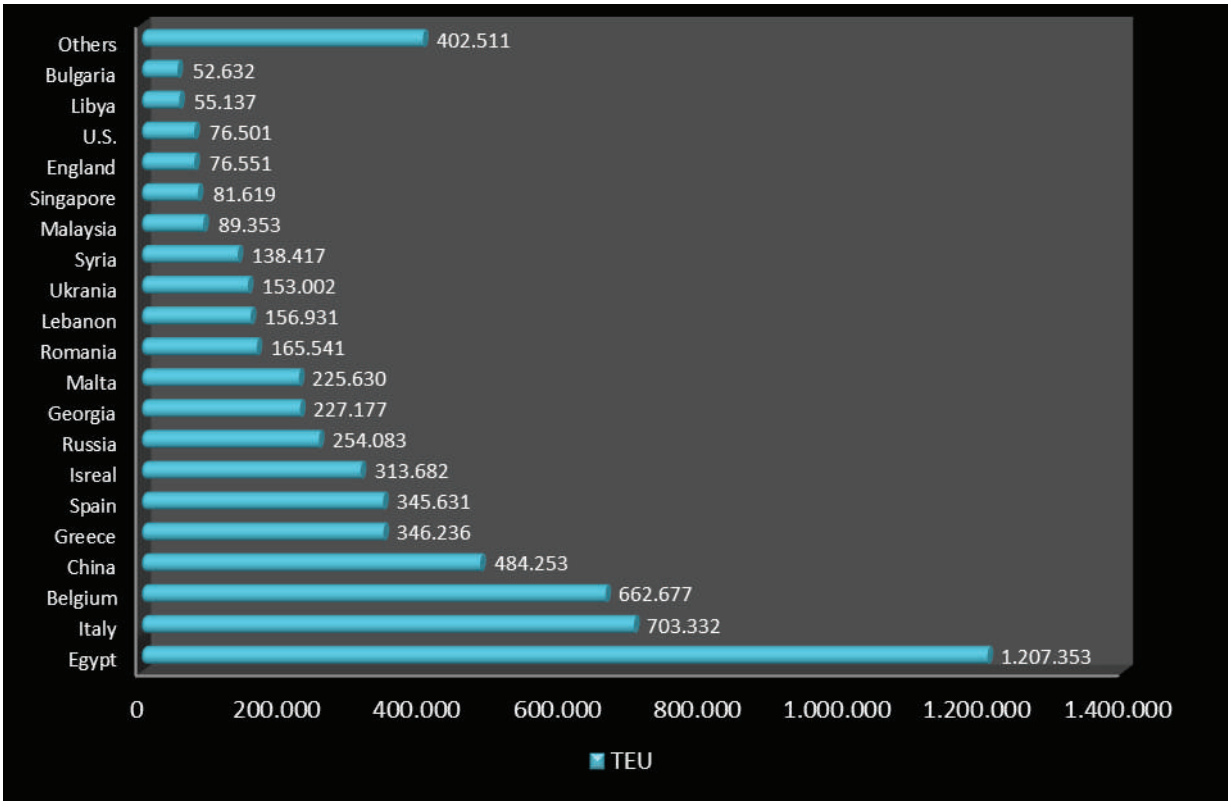

As of 2011, the countries which Turkey performed foreign trade with / conducted transit container transportation are as follows: Egypt (19.4%), Italy (11.3%) and Belgium (10.6%). The data of the foreign trade / transit container transportation of top 20 countries are shown in the Table 47.

## TABLE ( 47) : Position at the 20 Country Container Foreign Trade Handling (TEU) 2011

| | | Loading (TEU) | | | Unloading (TEU) | | | |
|---|---|---|---|---|---|---|---|---|
| **Rank** | **Country** | **Export** | **Transit** | **Total** | **Import** | **Transit** | **Total** | **General Total** |
| 1 | Egypt | 544.097 | 19.933 | 564.030 | 613.692 | 29.632 | 643.324 | 1.207.353 |
| 2 | Italy | 388.241 | 13.835 | 402.076 | 294.249 | 7.007 | 301.257 | 703.332 |
| 3 | Belgium | 316.113 | 30.606 | 346.719 | 283.979 | 31.980 | 315.959 | 662.677 |
| 4 | China | 171.664 | 33.880 | 205.544 | 171.883 | 106.826 | 278.709 | 484.253 |
| 5 | Greece | 149.905 | 5.255 | 155.160 | 184.460 | 6.616 | 191.076 | 346.236 |
| 6 | Spain | 179.487 | 17.602 | 197.089 | 122.678 | 25.865 | 148.543 | 345.631 |
| 7 | Isreal | 126.831 | 3.494 | 130.325 | 182.115 | 1.242 | 183.357 | 313.682 |
| 8 | Russia | 79.567 | 56.975 | 136.542 | 94.404 | 23.137 | 117.541 | 254.083 |
| 9 | Georgia | 71.039 | 48.708 | 119.747 | 96.590 | 10.840 | 107.430 | 227.177 |
| 10 | Malta | 122.326 | 89 | 122.415 | 102.864 | 351 | 103.215 | 225.630 |
| 11 | Romania | 67.365 | 24.697 | 92.062 | 31.142 | 42.337 | 73.479 | 165.541 |
| 12 | Lebanon | 56.374 | 533 | 56.907 | 99.999 | 25 | 100.024 | 156.931 |
| 13 | Ukrania | 29.261 | 46.187 | 75.448 | 64.399 | 13.155 | 77.554 | 153.002 |
| 14 | Syria | 13.033 | 511 | 13.544 | 124.607 | 266 | 124.873 | 138.417 |
| 15 | Malaysia | 3.299 | 284 | 3.583 | 85.714 | 56 | 85.770 | 89.353 |
| 16 | Singapore | 24.513 | 14.795 | 39.308 | 20.364 | 21.947 | 42.311 | 81.619 |
| 17 | England | 57.275 | 1.852 | 59.127 | 15.399 | 2.024 | 17.423 | 76.551 |
| 18 | U.S. | 39.586 | 758 | 40.344 | 34.725 | 1.432 | 36.157 | 76.501 |
| 19 | Libya | 31.461 | 1.409 | 32.870 | 22.212 | 55 | 22.267 | 55.137 |
| 20 | Bulgaria | 607 | 23.260 | 23.867 | 6.785 | 21.980 | 28.765 | 52.632 |
| | Others | 218.846 | 46.135 | 264.981 | 117.930 | 19.600 | 137.530 | 402.511 |
| | **Total** | **2.690.889** | **390.798** | **3.081.687** | **2.770.190** | **366.373** | **3.136.563** | **6.218.249** |

***Source: Republic of Turkey Ministry of Transport,Maritime Affairs and Communications***

## GRAPH (34) : Position of the 20 Countries' Container Foreign Trade Handling (TEU) 2011



## Vehicle Transportation through Ro-Ro Lines

There were 22 Ro-Ro ships in the Turkish Merchant Fleet at the end of 2011with a capacity of 203.335 DWT. (450.877 GRT.)

Ro-Ro lines of Turkey in 2003-2011 are shown below.

**TABLE (48): Ro-Ro Lines Transported Vehicles (2003- 2011)**

| Region | Ro-Ro Lines | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|---|---|---|---|
| Marmara | Pendik/Haydarpaşa-Trieste | 107,135 | 112,602 | 107,64 | 119,088 | 160,203 | 149,062 | 111,401 | 116,815 | 139.270 |
| | Ambarlı-Trieste | 32,591 | 37,888 | 33,333 | 38,954 | 41,085 | 39,998 | 30,372 | 37,627 | 18.017 |
| | Pendik/Haydarpaşa-Marseille | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7.480 | 2.130 |
| | Tekirdağ-Toulon | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9.269 | 0 |
| | Haydarpaşa-Odessa | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Haydarpaşa-Yuzhnyy | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | **Regional Total** | **139,726** | **150.490** | **140,973** | **158,042** | **201,288** | **189.060** | **141,773** | **171,191** | **159.417** |
| Mediterrenean | Taşucu-Girne | 13,404 | 33,241 | 38,768 | 35.560 | 33,393 | 32,305 | 31,032 | 36,071 | 36.316 |
| | Mersin-Magosa | 9,354 | 13,112 | 15,985 | 13,488 | 12,938 | 23,766 | 19,966 | 19,107 | 18.275 |
| | Mersin-Trieste | 0 | 0 | 0 | 0 | 0 | 0 | 12.019 | 28,571 | 37.093 |
| | Mersin-İskenderiye | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 253 |
| | **Regional Total** | **22,758** | **46,353** | **54,753** | **49,048** | **46,331** | **56,071** | **63,017** | **84,638** | **91.937** |
| Aegean | Çeşme-Trieste | 27,559 | 28.280 | 29,591 | 30,889 | 36,717 | 30,039 | 24,808 | 27,179 | 43.058 |
| | İzmir-Dedeağaç | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | **Regional Total** | **27,559** | **28.280** | **29,591** | **30,889** | **36,717** | **30,039** | **24,808** | **27,179** | **43.058** |
| Blacksea | Zonguldak-Ukrania | 8,739 | 9,153 | 15,629 | 19,147 | 27,099 | 23,632 | 20,476 | 19,573 | 23.540 |
| | Samsun-Novorossisky | 14,582 | 21.090 | 26,781 | 27.120 | 29,598 | 21,148 | 9.280 | 15,145 | 10.742 |
| | Samsun-Kavkaz | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1.383 |
| | Trabzon-Sochi | 1,609 | 3,512 | 3,403 | 6,574 | 7.180 | 10.150 | 7,066 | 5,078 | 637 |
| | Pize-Poti | 5,372 | 5,032 | 3,648 | 742 | 0 | 0 | 0 | 0 | 0 |
| | **Regional Total** | **30,302** | **38,787** | **49,461** | **53,583** | **63,877** | **54.930** | **36,822** | **39,796** | **36.302** |
| | Grand Total | 220,345 | 263.910 | 274,778 | 291,562 | 348,213 | 330.100 | 266.420 | 322,804 | 330.714 |

***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

Table 48 above shows the amounts of the transported full vehicles (export and import) in the years 2003-2011.

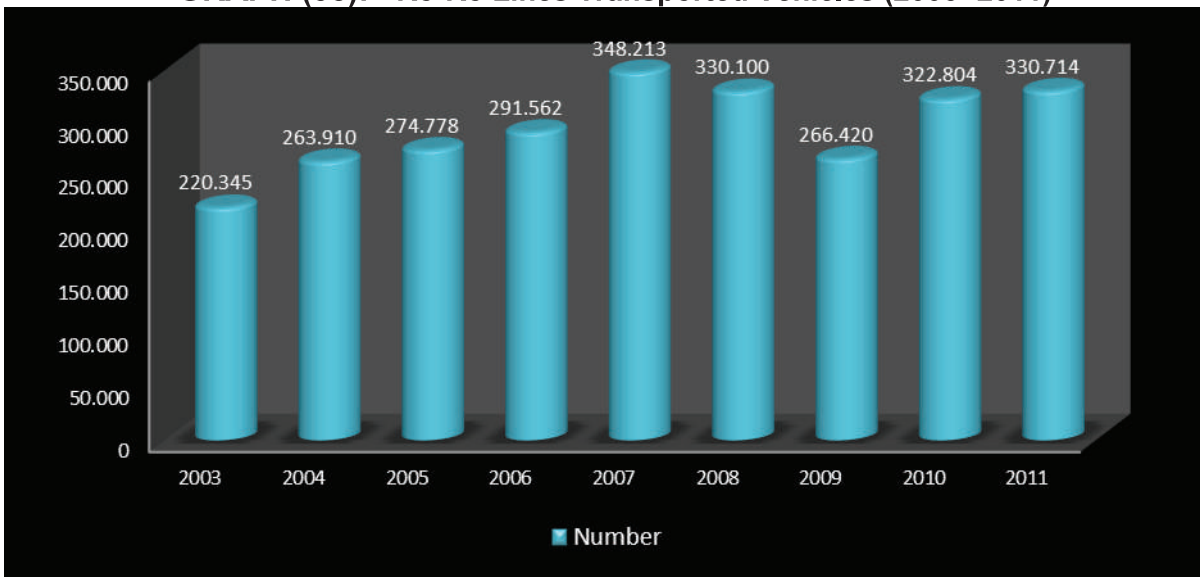
In The Black Sea region; 637 vehicles on Trabzon-Soçhi line, 10.742 vehicles on Samsun-Novorossisky line, 1.383 vehicles on Samsun-Kavraz line and 23.540 vehicles on Zonguldak- Ukraine line, totally regional 36.302 vehicles have been transported in 2011.

In The Marmara Sea region; 18.017 vehicles have been carried on **Ambarlı-Trieste line**, 139.270 vehicles on **Pendik/Haydarpaşa-Trieste line**, 2.130 vehicles on **Pendik/Haydarpaşa-Marseille line** totally regional 159.417 vehicles have been transported in 2011.

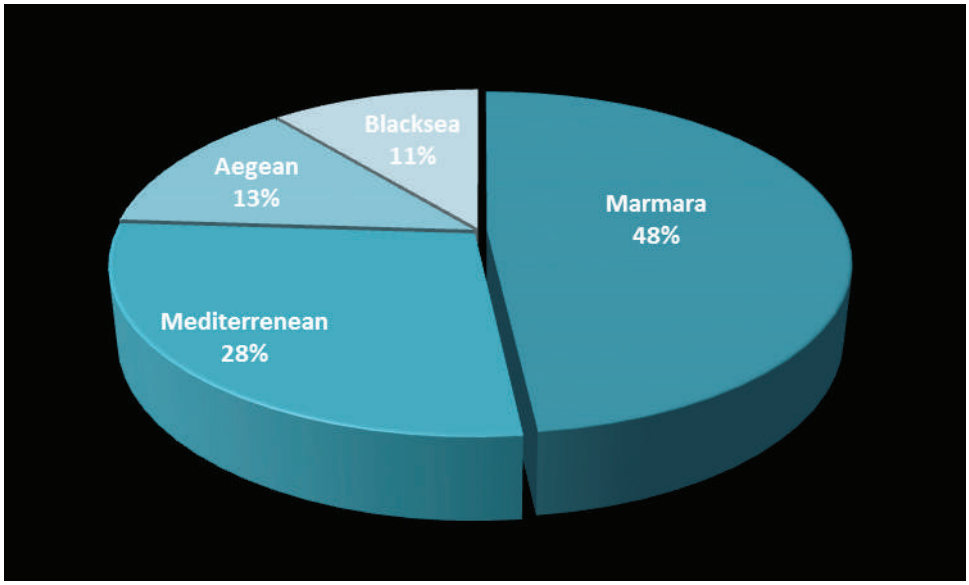
In The Aegean Sea region; 43.058 vehicles have been carried on **Çeşme-Trieste line**, totally regional 43.058 vehicles have been transported in 2011.

In The Mediterranean region; 36.316 vehicles have been carried on **Taşucu-Girne line**, 18.275 vehicles on **Mersin-Magosa line**, 37.093 vehicles have been carried on **Mersin-Trieste line,** 253 vehicles have been carried on **Mersin-Iskenderiye line,** totally regional 91.937 vehicles have been transported in 2011.

**GRAPH (35): Ro-Ro Lines Transported Vehicles (2003- 2011)**




**GRAPH ( 36 ) : RO-RO Lines Transported Vehicles (2011)**




The majority of the transported vehicles by Regions are, 48 % the Sea of Marmara Region, 11 % Black Sea Region, 28 % Mediterranean Region and 13 % The Aegean Sea Region in 2011.


SHIP BUILDING

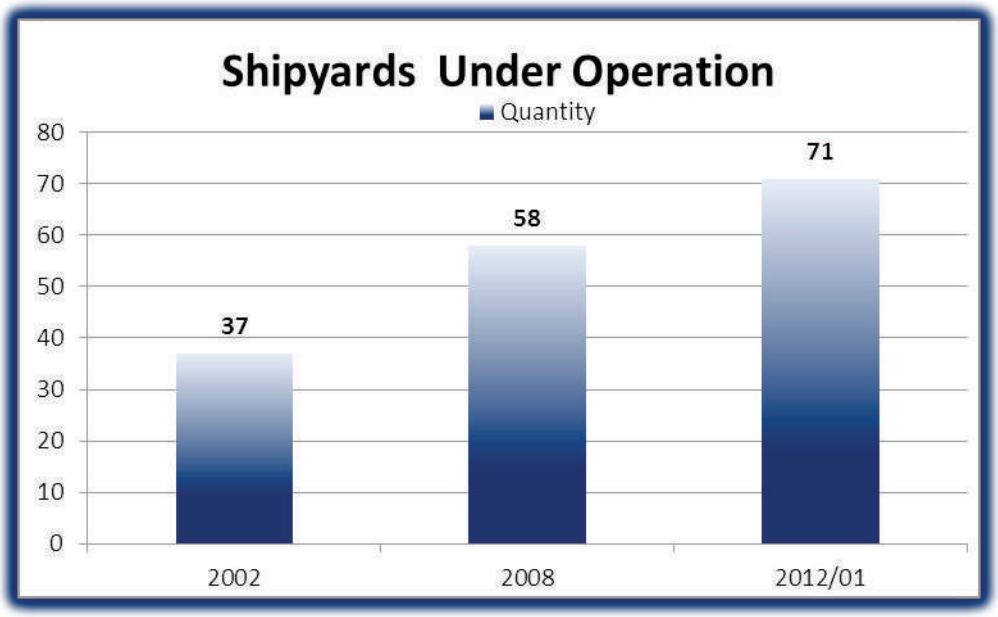
# CHAPTER III

## SHIPBUILDING INDUSTRY

### General Outlook of Turkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, under operation rised up to 71 as of January 2012 while it was just only 37 in 2002 . The quantity of shipyards under construction are 54 by the end of 2011.

**GRAPH (37): 2002 / 2011 Shipyards Under Operation**




***Source: Ministry of Transport, Maritime Affairs and Communications***

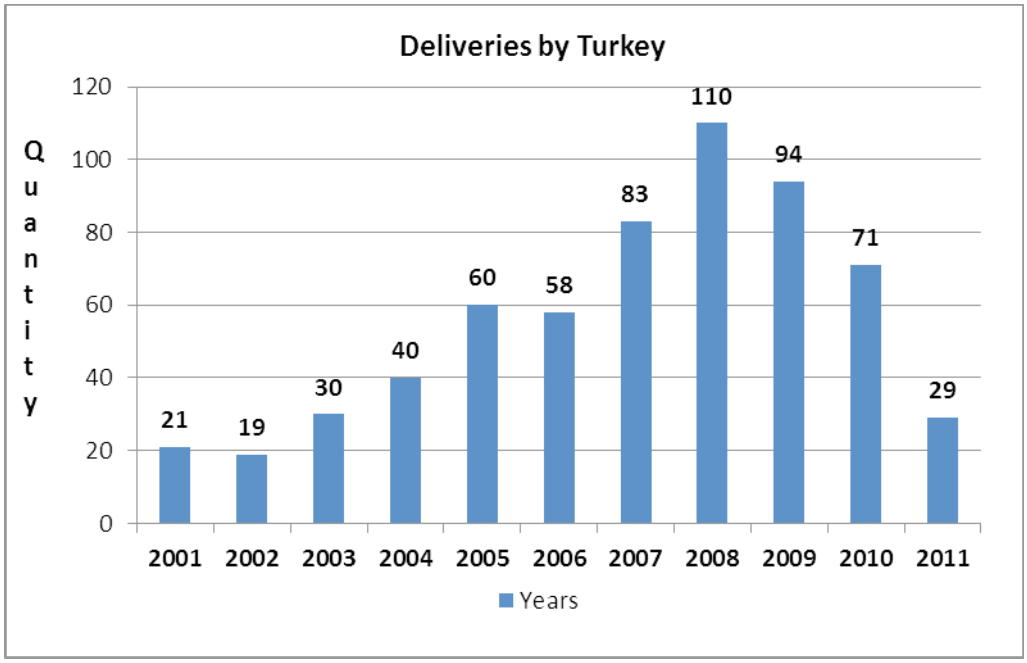
Shipbuilding industry is a branch of heavy industry which provides;

- Progress in sub-industry
- Increase in employment and the population of the neighbourhood
- Rising the standards of quality of sub-industry
- Increase of qualified productive power
- Progress in growth and strength of regional trade
- Rising the living circumstances and the cultural level of labour
- Employment in ratio 1 to 7 including sub-industry.

Turkish Shipyards delivered 166 ships, DWT of 836.000,between 1995-2001. Also, between the years 2002 and 2007, 443 ships with total DWT of 3.051.000 have been delivered.

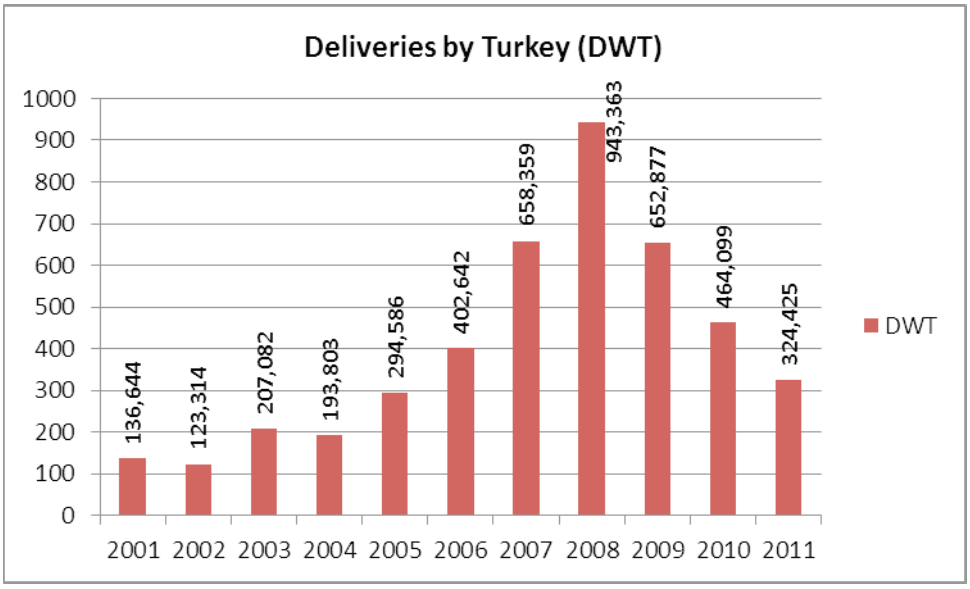
In 2011, 29 ships DWT of 324.425 tons had been delivered.

**GRAPH (38) : Number of Ships Delivered Between 2001-2011**




***Source: Clarkson Research Services***

**GRAPH (39): DWT of Ships Delivered Between 2001-2011**

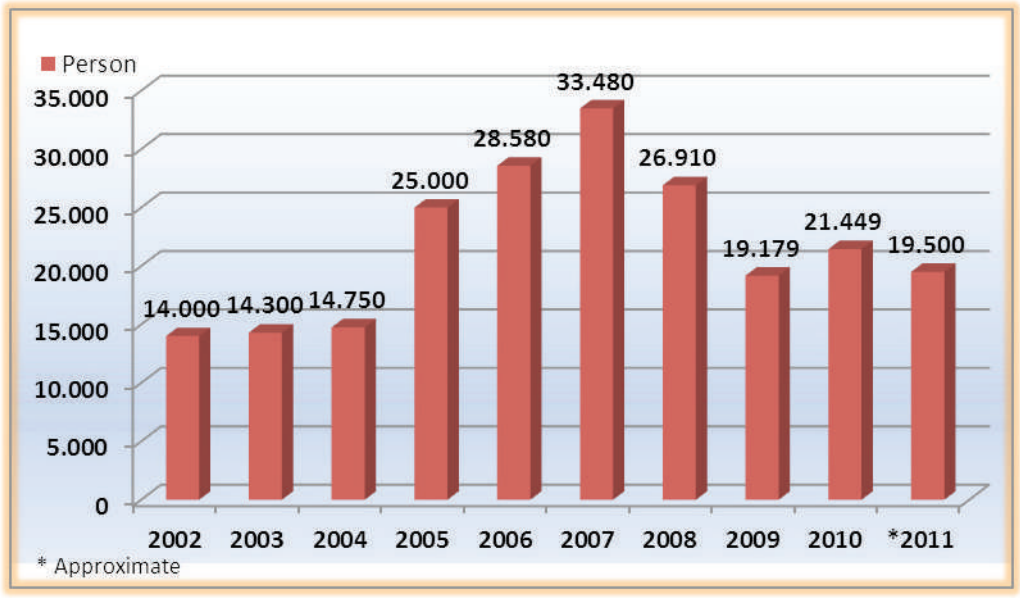



***Source: Clarkson Research Services***

Some of the operative shipyards in Turkey still continue the modernization and extension operations but on the other hand, due to the global economic crisis, some of them suspend or cancel their modernization or extension projects because of the sanctions applied by the banks on the shipyards.

Furthermore, 54 shipyards which are under construction in different cities of Turkey, have been affected from the global economic crisis, too.

**GRAPH (40): Employee Numbers In Turkish Shipyards by 2011**




***Source: Turkish Shipbuilders' Association***

**TABLE (49): Shipyards Under Operation 2011**

| City | Shipyard Name |
|---|---|
| İSTANBUL | |
| 1 | Erkal Uluslararası Nakliyat ve Ticaret A.Ş. |
| 2 | Gemsan Gemi ve Gemi İşlet. San. Ve Tic. Ltd. Şti. |
| 3 | Hidrodinamik Gemi San. ve Tic. A.Ş. |
| 4 | Gemak Gemi İnşaat Sanayi ve Tic.A.Ş. |
| 5 | Desan Deniz İnşaat Sanayi A.Ş. |
| 6 | Şahin Çelik Sanayi A.Ş. |
| 7 | Yıldırım Gemi İnşa Sanayi A.Ş. |
| 8 | İstanbul Denizcilik Gemi İnşa san. |
| 9 | Anadolu Deniz İnşaat Kızakları San. ve Tic. A.Ş. |
| 10 | Deniz Endüstrisi A.Ş. |
| 11 | Türkter Tersane ve Deniz İşlet. A.Ş. |
| 12 | Yıldız Gemi ve Makine San. Tic. A.Ş. |
| 13 | Çelik Tekne Sanayi ve Ticaret A.Ş. |
| 14 | RMK Marine Gemi Yapım San. |
| 15 | Sedef Gemi İnşaatı A.Ş. |
| 16 | Tuzla Gemi Endüstrisi A.Ş. |
| 17 | Selah Makine ve Gemicilik End. A.Ş. |
| 18 | Dearsan Gemi İnşaat Sanayi A.Ş. |
| 19 | Ada Denizcilik ve Tersane İşlet. A.Ş. |
| 20 | Torlak Denizcilik Sanayi ve Tic. A.Ş. |
| 21 | Yardımcı Gemi İnşa A.Ş. |
| 22 | Çeksan Gemi İnşa San. Ve Tic. A.Ş. |
| 23 | Gisan Gemi İnşa San. ve Tic. Ltd. Şti. |

| | |
|---|---|
| 24 | Torgem Gemi İnş. Sanayi ve Tic. A.Ş. |
| 25 | Dentaş İnşaat ve Onarım San. A.Ş. |
| 26 | Çındemir Mak. Gemi Onarım ve Tersanecilik A.Ş. |
| 27 | Dalsan Liman İnş., Tarama, Gemicilik San. |
| İZMİT | |
| 1 | Türker Gemi Yapımı ve Sanayi Ticaret A.Ş. |
| 2 | Soli Gemi İnşa San. ve Tic. A.Ş. |
| 3 | TVK Gemi Yapım. San. Tic. A.Ş. |
| 4 | Marmara Tersanesi A.Ş. |
| 5 | Um Deniz Sanayi A.Ş. |
| 6 | Uzmar Gemi Yapım Sanayi A.Ş. |
| YALOVA | |
| 1 | NACİ SELİMOĞLU Deniz İşletmeciliği Tic. A.Ş. |
| 2 | SELTAŞ Denizcilik San. ve Tic. A.Ş. |
| 3 | YAŞARSAN Gemi İnşa San. ve Tic. Ltd.Şti. |
| 4 | ALTINTAŞ Mermer ve Tersanecilik San. ve Tic. A.Ş. |
| 5 | KURBAN Gemi İnşa İnş.  San. ve Tic. Ltd.Şti. |
| 6 | CEMRE Mühendislik Gemi İnşa San. ve Tic. Ltd.Şti. |
| 7 | AYKIN Tersanecilik ve Taş. İnş. San.ve Tic.Ltd. Şti. |
| 8 | TÜRKOĞLU Gemi İnşa San. ve Tic. Ltd.Şti. |
| 9 | KOCATEPE Denizcilik ve Gemiinşa San. Tic.Ltd. Şti. |
| 10 | BEŞİKTAŞ Gemi İnşa A.Ş. |
| 11 | ARİF KALKAVAN Oğulları Gemicilik A.Ş. |
| 12 | DÜZGİT Yalova Gemi İnşa San. A.Ş. |
| 13 | DEN-TA Denizcilik Tic. ve San. Ltd.Şti. |
| 14 | VBG Altınova Tersaneleri |
| 15 | Sefine Denizcilik Tersanecilik tur. San. ve Tic. Ltd. Şti. |
| 16 | Boğaziçi Tersanecilik Gemi İnşa San. Ve Tic. A.Ş. |
| 17 | Özata Yat İnşa Çekek Bakım Onarım San.Tic.Ltd.Şti. |
| 18 | Altınova Yat İnşacılar San. ve Tic. A.Ş. |
| 19 | GİSAN Gemi İnşaa San. ve Tic. A.Ş. |
| 20 | Hatsan İnş.M.T. Gemi İnşa ve Deniz San.Tic.A.Ş. |
| 21 | Yüksel Tersanecilik |
| ZONGULDAK | |
| 1 | Azim Otel Turizm Deniz. Metal San. ve Tic. Ltd. Şti. |
| 2 | Ereğli Gemi İnşa San. ve Tic. A.Ş. |
| 3 | Madenci Gemi San. Ltd. Şti. |
| 4 | Med-Yılmaz Gemi İnşa San. ve Tic. A.Ş. |
| 5 | Umo Gemi San. Tic. Ltd. Şti. |
| 6 | Usmed Gemi İnşa San. ve Tic. A.Ş. |
| 7 | Ustamehmetoğlu Gemi Tersanesi |
| 8 | Ustaoğlu Yat ve Gemi San. Tic. A.Ş. |
| ÇANAKKALE | |
| 1 | Gelibolu Gemi İnş. San. ve Tic. A.Ş. |
| 2 | İçdaş Çelik Enerji Tersane ve Ulaş. San. ve A.Ş |
| TRABZON | |
| 1 | Rıfkı BAŞARAN Tersanesi |

| | |
|---|---|
| ORDU | |
| 1 | Karadeniz Gemi İnşa Sanayi A.Ş. |
| SAMSUN | |
| 1 | Terme Tersanesi A.Ş. (Terme-Samsun) |
| KASTAMONU | |
| 1 | Cide (Berk)Gemi ve Yat San. Tic. A.Ş |
| SAKARYA | |
| 1 | Gündoğdu Gemi Yan Sanayi ve Deniz Ltd. Şti |
| HATAY | |
| 1 | İster İsken. Liman ve Tersane İşlet. Ltd. Şti. |
| ADANA | |
| 1 | Akdeniz (Akbaşoğlu) Gemi İnşa |

***Source: Ministry of Transport, Maritime Affairs and Communications***

**TABLE (50): Shipyards Under Construction 2011**

| City | Shipyard Name |
|---|---|
| İSTANBUL | (Proje) |
| 4 | Dalsan Liman İnşaatı, Tarama, Gemicilik San. |
| YALOVA | |
| 1 | GÜRDESAN Gemi İnşa San.ve Tic.A.Ş. |
| 2 | HÜRRİYET Denizcilik San. ve Tic.Ltd. Şti. |
| 3 | ARKAS Denizcilik ve Nakliyat A.Ş. |
| 4 | YÜKSEL PROJE Uluslararası A.Ş. |
| 5 | FURTRANS Gemi İnşa ve Ters. Tic. Ve San. A.Ş. |
| 6 | MUSTAFA OKANOĞULLARI Gem. San.ve Tic.A.Ş. |
| 7 | MARDAŞ Marmara Deniz İşletmeciliği A.Ş. |
| 8 | AK İNŞAAT Mermercilik ve Tic. A.Ş. |
| 9 | PALHAN Tersanecilik San. ve Tic. Ltd. Şti. |
| 10 | Boğaziçi Denizcilik San. Tic. A.Ş. |
| 11 | BREKO Nieuwbouw II BV |
| 12 | ÖZLEM Tersanecilik Taşımacılık İnşaat San. ve Tic. Ltd.Şti. |
| 13 | Herçelik Deniz End. İç ve Dış Tic. Ltd.Şti. |
| 14 | CS DENİZCİLİK Nakliyat ve Ticaret Ltd.Şti. |
| 15 | Gemak Gemi İnşaat Sanayi ve Ticaret A.Ş. |
| 16 | Bosfor Gemi ve Yat İnşa San. Ve Tic Ltd. Şti. |
| 17 | SMS Gemi İnşa Sanayi A.Ş. |
| 18 | Bayrak Denizcilik Taşımacılık San. ve Tic. Ltd. |
| 19 | Yalova Gemi Tersanecilik Denizcilik Ltd.Şti. |
| 20 | ICT Yat Sanayi Tur.Tic.A.Ş. |
| TRABZON | |
| 1 | Nur Gemi İnşa A.Ş. |
| ORDU | |
| 1 | Çillioğlu Gemi San. Ulus. Nak. ve Tur. Ltd. Şti. |
| SAMSUN | |
| 1 | Atilla Mak. Mon. İzo. Taah. İnş. Tur. Nak. ve Tic. Ltd. Şti |
| 2 | C-M Denizcilik San. ve Tic. A.Ş. |

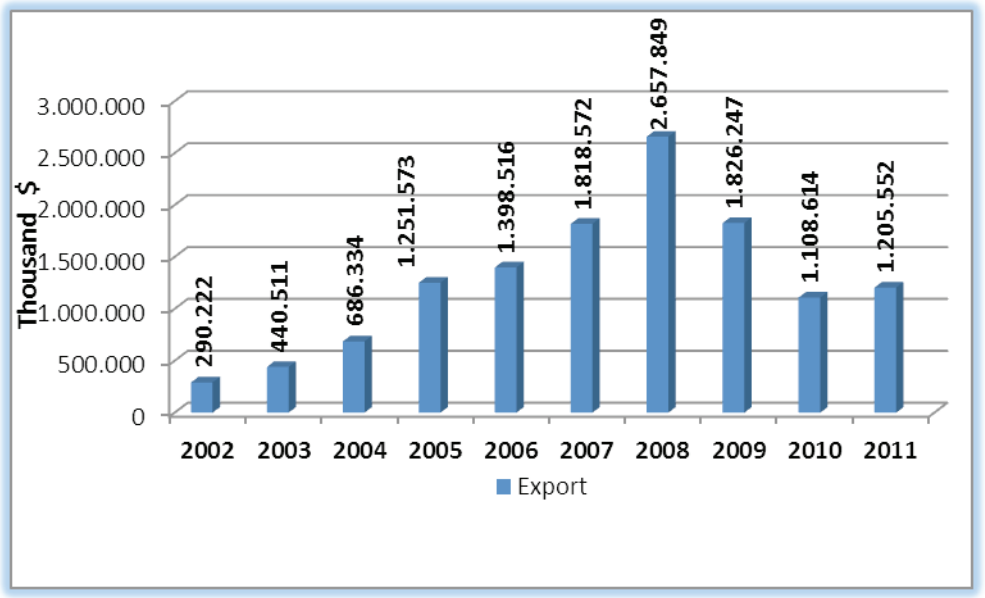
| | |
|---|---|
| 3 | Kanlar Den. İnş. Nak. Gemi İnşa San. Tic. ve Ltd. Şti. |
| 4 | İhaleye çıkılacak Parsel |
| 5 | Samsun Tersanesi |
| 6 | MBB Denizcilik ve Gemi İnş. San. Tic. A.Ş. |
| 7 | Aksoylar Gıda San. ve Tic. Şti. |
| 8 | Çeltikçioğlu İnşaat San. ve Tic. Ltd. Şti. |
| 9 | Öktemler Denizcilik ve Gemi İnşaat San. |
| SİNOP | |
| 1 | Taşkınlar Tersanesi |
| KASTAMONU | |
| 1 | İnebolu Tersanesi |
| 2 | Art Gemi Sanayi |
| 3 | Çakırağa Gemi İnşa LTD.Şti. |
| ZONGULDAK | |
| 1 | Likoğlu Grup Gemi İnşa San. |
| 2 | İşler Gemi Acenteliği San. Ltd. Şti. Tersanesi |
| 3 | Demir Gemi Tersanesi San. ve Tic. Ltd. Şti. |
| 4 | Cansu deniz Nakliyat ve Gemi San. ve Tic. Ltd. Şti. |
| ÇANAKKALE | |
| 1 | Gülman Tersanesi |
| 2 | Zeytinoğlu Tersanesi |
| 3 | Bekirli Tersanesi |
| 4 | Gelibolu Gemi Endüstri Tersanesi |
| 5 | Eras-İçdaş Tersanesi |
| 6 | Pera Denizcilik Tersanesi |
| BALIKESİR | |
| 1 | Bandırma Gemi İnşa San. Tic. Ltd. Şti. |
| 2 | Kapıdağ Tersanesi |
| MERSİN | |
| 1 | Akter Akdeniz Taşucu Gemi İnşa San. A.Ş. |
| ADANA | |
| 1 | Tersan Tersanecilik |
| 2 | UGOD |

***Source: Ministry of Transport, Maritime Affairs and Communications***

Before 2003; maximum tonnage of 16.000DWT ship orders (as in one piece) could be taken. By 2007, it has raised up to 180.000DWT but unfortunately the construction did not start due to the economic crisis.

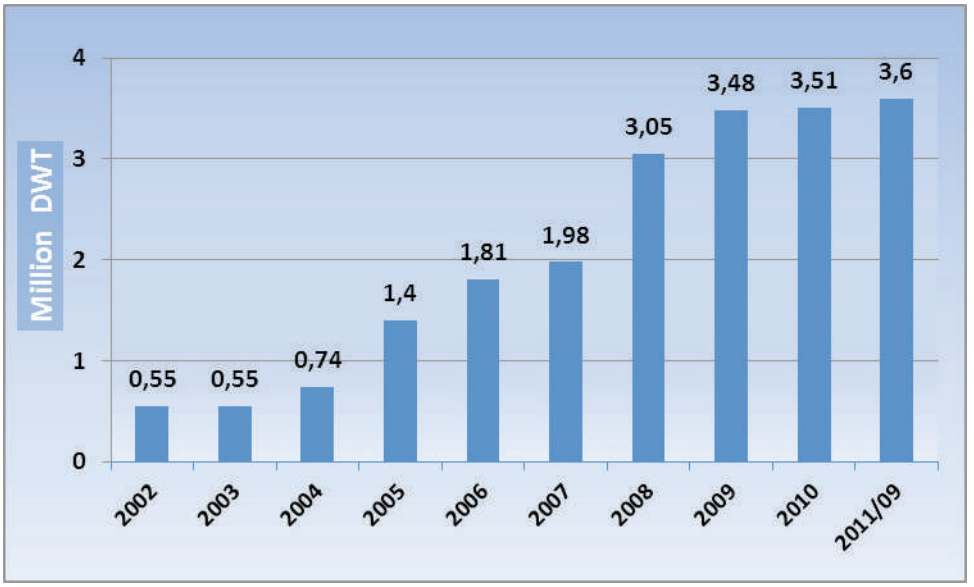
Most of the ships constructed in Turkish shipyards are being built for export. Especially between 2002-2009, almost the total amount of these ships exported to the EU member countries.

**GRAPH (41): Export Figures of Turkish Shipbuilding Industry**




***Source: Turkish Shipbuilders' Association***

**GRAPH (42): Shipyards Project Capacities between 2002-2011**

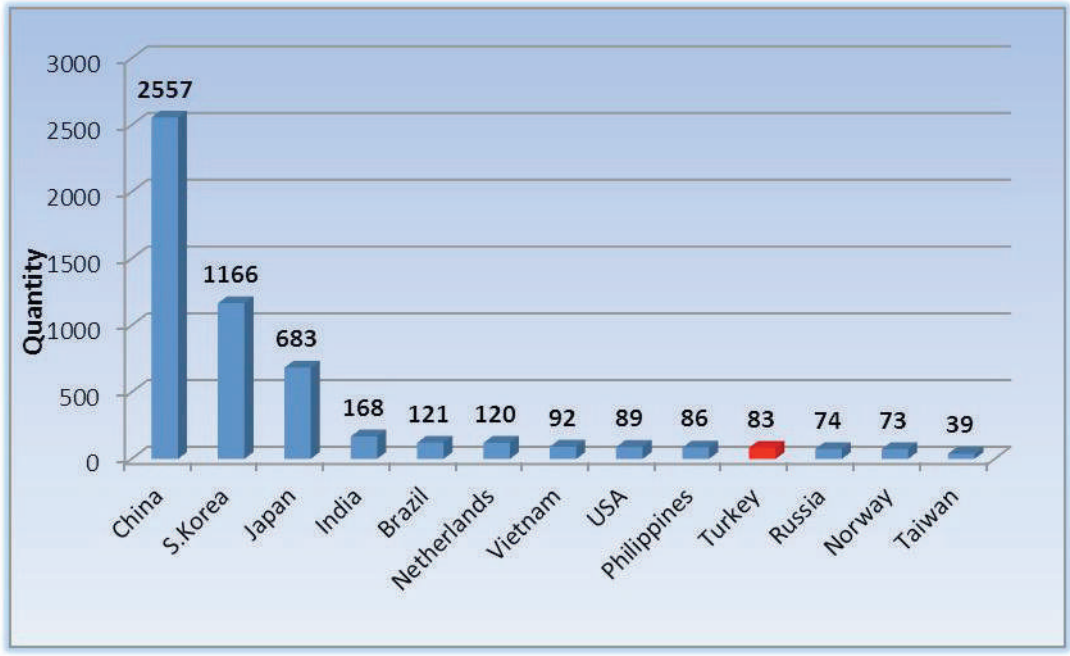



***Source: Ministry of Transport, Maritime Affairs and Communications***

In 2002, our shipyards founded capacity was 550.000DWT.In 2011 it's reached up to 3,60 million DWT which means a growth more over 6 times then 2002.

By the end of 2011, orders in our yards was decreased to 0,7 Million DWT which was over 4 Million DWT in 2007.

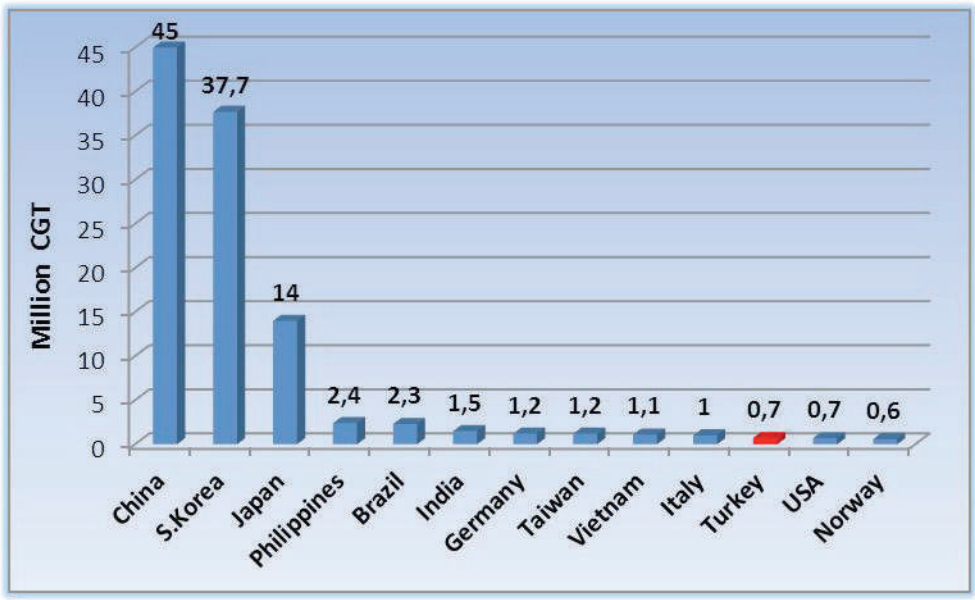
**GRAPH (43): Orderbook by Builder Country (Quantity)**




***Source: Clarkson Research Services 01/2012***

According to quantity Turkish yards are in the 10th place in world ranking

**GRAPH (44): Orderbook by Builder Country (Tonnage)**

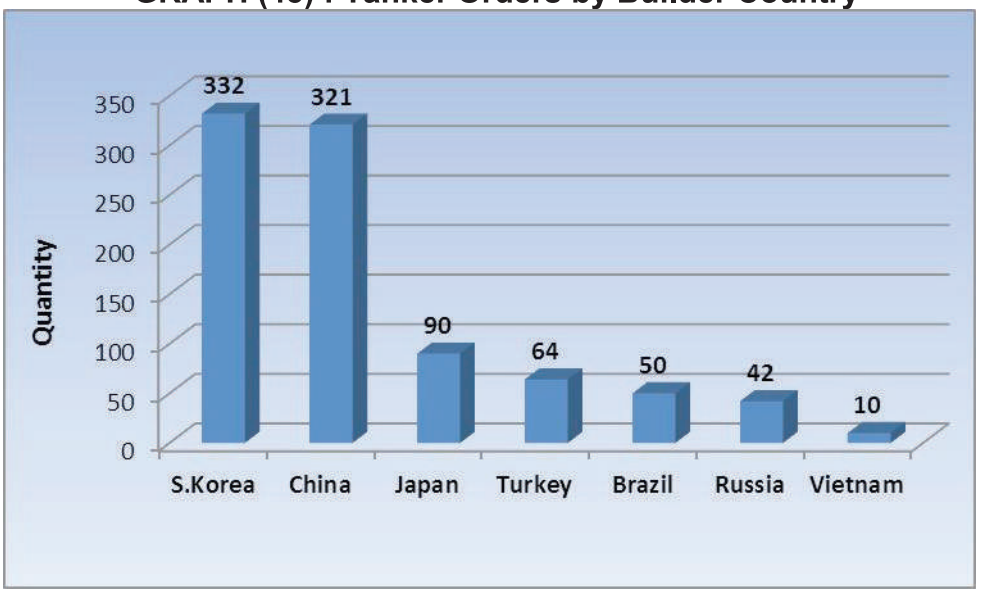



***Source: Clarkson Research Services 01/2012***

Turkish yards are in the 11th place of world orderbook ranking list according to tonnage basis in CGT.

Our shipyards have a good reputation in building of small and medium tonnage chemical tankers. By January 2012, Turkey was in the 4th place among the countries which takes tanker orders.

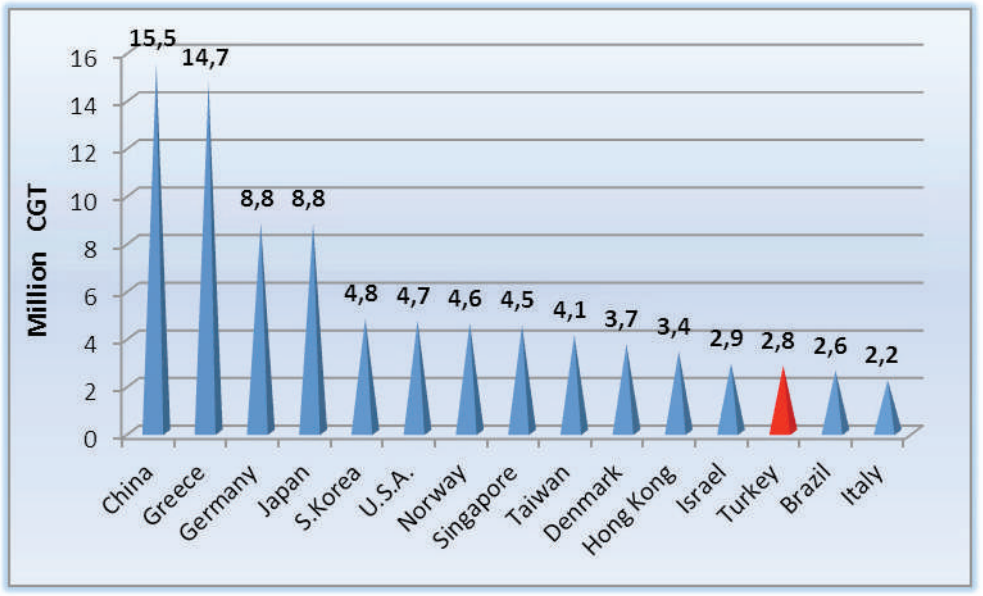
**GRAPH (45) : Tanker Orders by Builder Country**




***Source: Clarkson Research Services 01/2012***

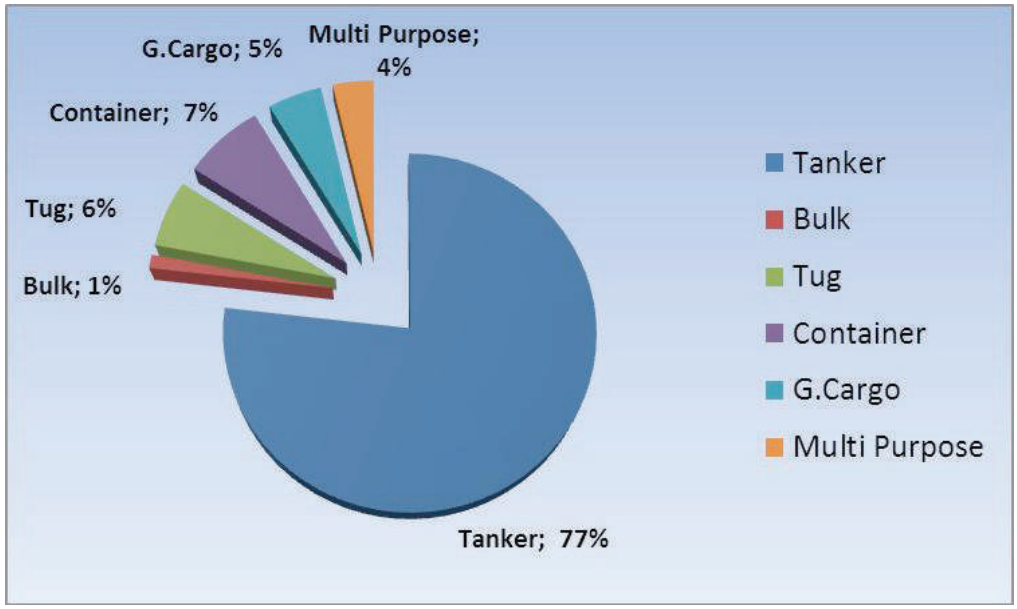
Turkish shipowners with their orders worldwide about 2,8 million CGT of 170 ships are in the 13 th place in world ranking.

**GRAPH (46): Orderbooks by Owner Country**




***Source: Clarkson Research Services 01/2012***

**GRAPH (47): Distribution of Orders According to Shiptype**




***Source: Clarkson Research Services 02/2012***

## Yacht and Boat Building Industry

Yacht and boat building is one of the most important sectors with its high accretion value, high export ratio and it provides employment. This industry is combination of sectors in yards which deals with ironing, painting, electric, electronic textile, decoration etc.

Yacht and boat building industry is quite different from the shipbuilding because of its concept, scope and technology.In shipbuilding industry long term investments and big coastal areas are needed for production, but in boat & yacht building relatively less investments, areas and time are needed.Boat &yacht building comparatively do not need very big investments but has a big accretion value.

Turkey; with its beautiful coast, cultural and historical resources, has a great market potential not only for yachts but especially for mega-yacht tourism. Inclusion of mega-yacht mooring places to the projects which are planning to be constructed in Ataköy and Zeytinburnu,will be a great prestige and income for our marine tourism.

If we summarize the advantages of our boat&yacht building industry, the main positive aspects are;

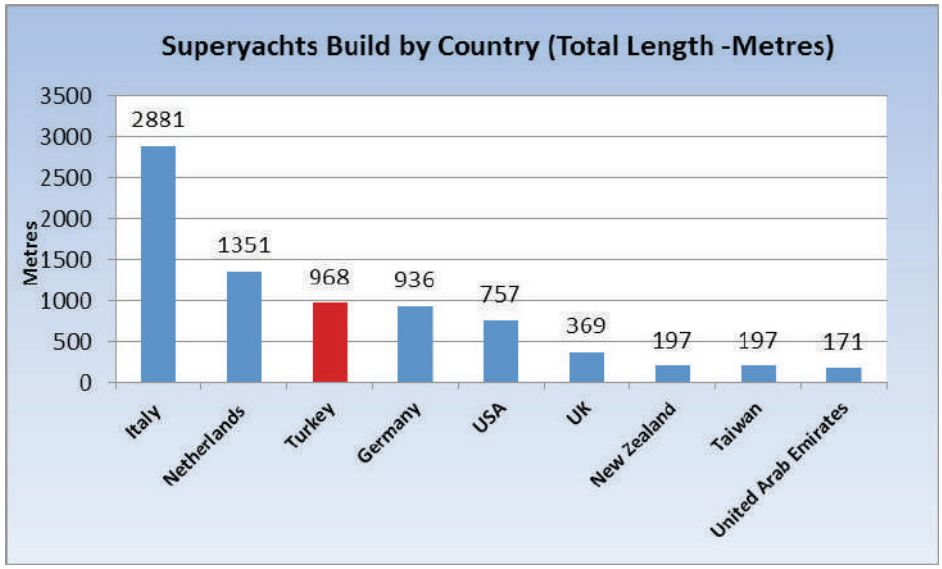
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to international markets
- Appropriate climate
- Our country's potential in boat&yacht building

Main disadvantages are;

- Heavy taxes of special consumption,value added and motor vehicle collected from boats.
- Long bureaucratic procedures during the registering operations.

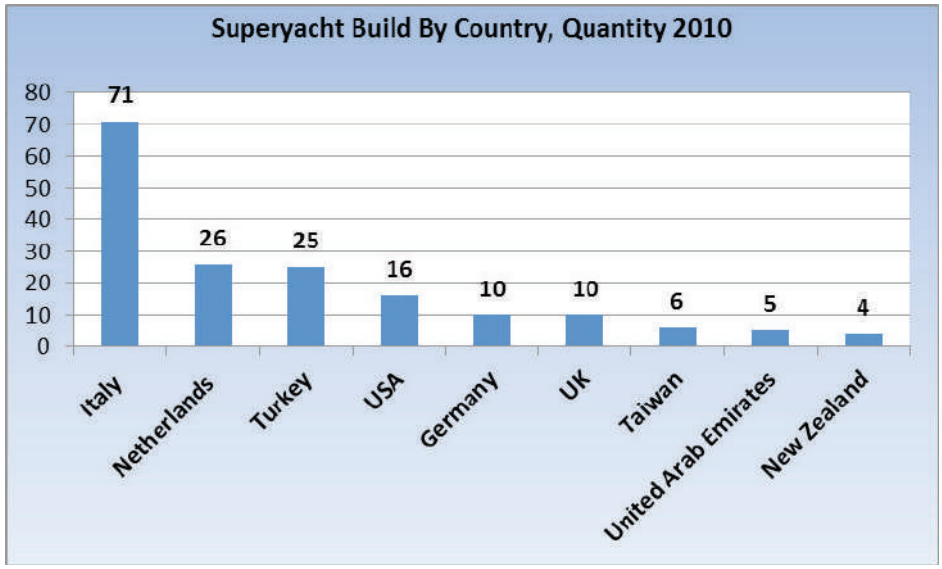
The 195 pieces of 30 metre & plus superyachts delivered in 2010 were built in 24 diffrent countries. Turkey is in the 3rd place with 25 superyachts with the total length of 968 metres which equals to 11,20% of market share.

**GRAPH (48): Superyachts Build by Country, Total Length 2010**




*Source:The Super Yachting Index- Fourth Edition July 2011*

**GRAPH (49): Superyachts Build by Country, Quantity 2010**



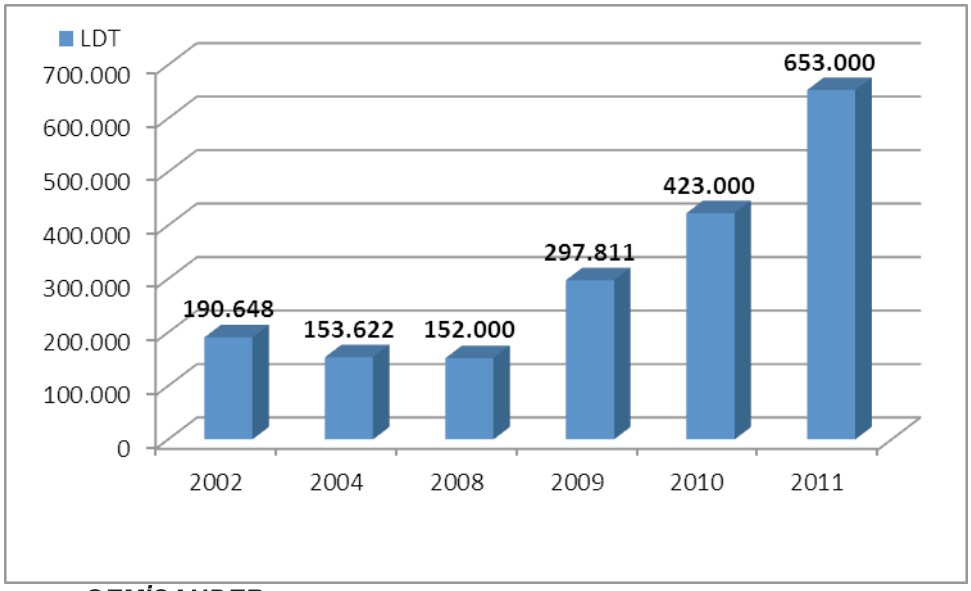

*Source:The Super Yachting Index- Fourth Edition July 2011*

## Ship Breaking Industry

Aliağa region which is located in the city of İzmir, is in the leading position for ship breaking and recyling activities with 21 facilities. In 2009;

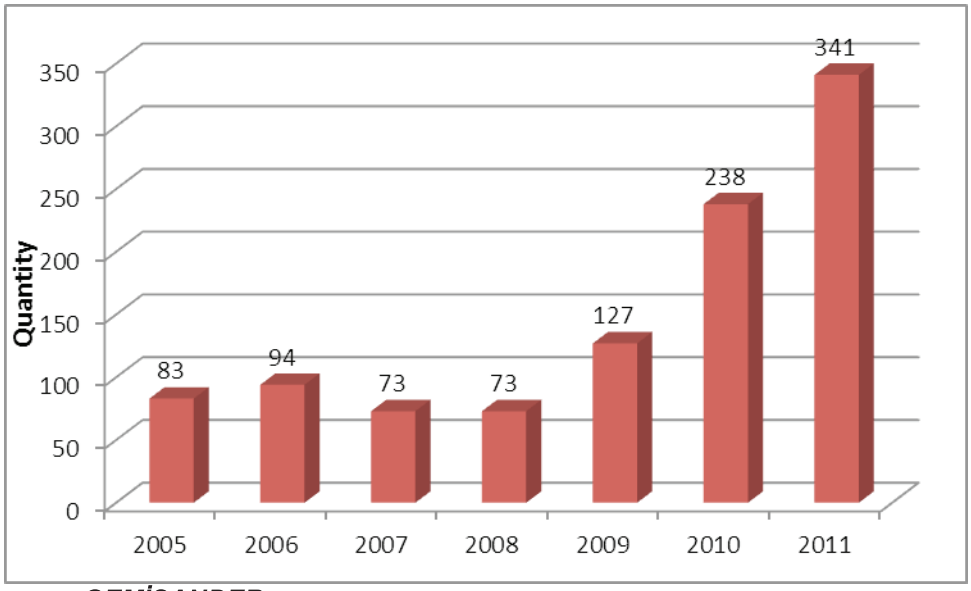
- Annual capacity is 900.000 LDT
- Max.Vessel Tonnage (Recyled) is 50.000 LDT
- Annual net scrap production 250.000 Tons

**GRAPH (50): Recyled Vessels in LDT (2011)**




***Source: GEMİSANDER***

**GRAPH (51): Recyled Vessels in Quantity (2011)**




***Source: GEMİSANDER***

By the effect of the new regulations, especially about the tankers, ship breaking in Turkey increased 69% in quantity, 64% in LDT when compared with the previous year.

**Sub- Industry**

With parallel to the improvements in the recent years, Turkish sub-industry is in progress but still some of the items are imported by the shipyards due to the lack of production. Sub-industry which is 20% percent of the ship's price, is one of the most important branches in shipbuilding industry.It has the highest employment value in sub-sectors.Employment in sub-industry is 33000 persons in Japan, 65000 persons in S.Korea and 262.000 persons all over the Europe.Main problem of sub-industry in Turkey is to be made by local and small enterprises which cause problems about standardizing and approving the products.

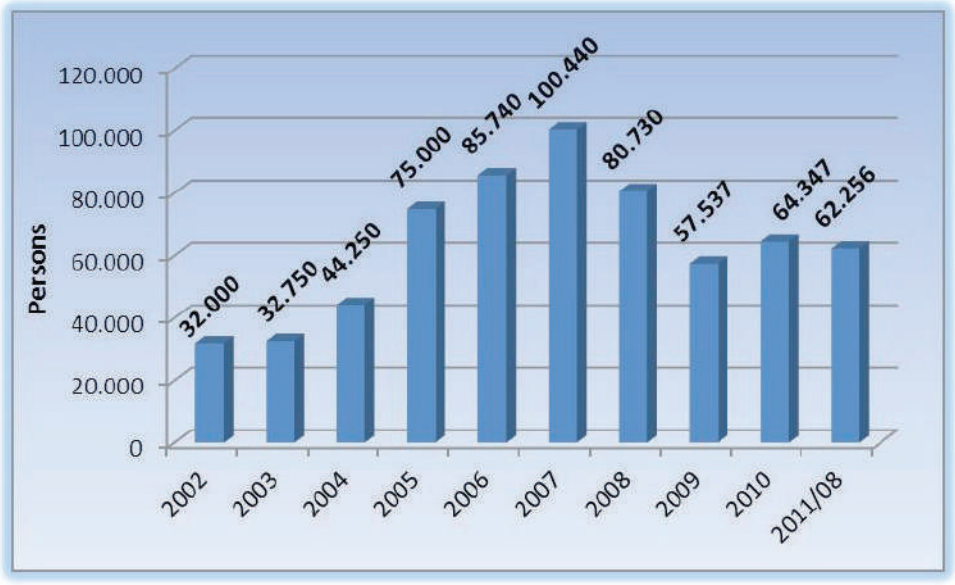
Turkish sub-industry regarded as one of the best in supplying anchor, chain, bollard, electric cables, hydrolic units but in electronic equipment especially in navigational systems due to their producer are a few basic worldwide, sector needs to obtain from import resources.Steel sheet production in Turkey can also meet the small amount of the requests.

Turkish Sub-industry is able to produce;
Anchor, chain, bollard, locking equipments - Windlass and equipments - Valves and Central heating Systems - Electric Panels and Tables - Fire Fighting Systems - Pumps - Isolation Equipments - Pipes – Refrigerated Units - Hatch Covers - Diesel generator – Boiler - Carpenter and furnishings.

Main items which are imported in sub-industry can be summarize as;
Sheet steel/iron and profiles – Holland profiles – Telecommunication systems – Rudder Systems – Bow /Stern thrusters.

Sub-industry creates employement as 1 to 3.In 2002 employement in sub-industry was 30.000 people and it raised to 103.500 but unfortunately due to the global economic crisis it decreased to 57.537 by the end of 2009.

**GRAPH (52):Shipbuilding Sub-Industry Employement**




***Source: Ministry of Transport, Maritime Affairs and Communications***

## TABLE (51) : Orderbook of Turkish Shipyards as of February 2012

| | Hull No. | Type | Dwt | GRT | Size | Unit | CGT | Delivery | Yard | Yard Status | Contract Date | Current Owner |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | H65 | AHTS | 1,9 | | 10,876 | HP | 4,494 | 2012-03 | Selah Shipyard | Established <2000 | 01.01.2011 | Marnavi S.P.A. |
| 2 | A-04 | Chem & Oil | 5,5 | 3,3 | 5,5 | DWT | 7,235 | 2012-01 | Unknown Yard /Turkey | Established <2000 | 01.07.2008 | Akar Deniz Tasimac. |
| 3 | 5 | Chem & Oil | 15,985 | 7,993 | 15,985 | DWT | 11,77 | 2012- | Duzgit Shipyard | Greenfield | 01.06.2010 | Duzgit Group |
| 4 | 6 | Chem & Oil | 8,3 | | 8,3 | DWT | 9,123 | 2012- | Duzgit Shipyard | Greenfield | 01.07.2010 | Duzgit Group |
| 5 | 1 | MPP | 9,5 | 4,896 | 9,5 | DWT | 6,207 | 2012- | Akdeniz Gemi | Greenfield | 01.07.2008 | Akdeniz Gemi |
| 6 | 36 | Chem & Oil | 38 | 22,495 | 38 | DWT | 20,793 | 2012-04 | UM Deniz Shipyard | Established <2000 | 01.01.2007 | Unknown |
| 7 | 34 | Container | 10,6 | 8,97 | 917 | TEU | 9,261 | 2012- | UM Deniz Shipyard | Established <2000 | 01.04.2005 | Volum Denizcilik |
| 8 | N/A | Chem & Oil | 12,7 | | 12,7 | DWT | 11,527 | 2013-06 | Marmara Tersanesi | Established <2000 | 03.12.2010 | Yilmar Shipping |
| 9 | N/A | Chem & Oil | 8,5 | | 8,5 | DWT | 9,243 | 2013-05 | Marmara Tersanesi | Established <2000 | 03.12.2010 | Yilmar Shipping |
| 10 | N/A | Chem & Oil | 8,5 | | 8,5 | DWT | 9,243 | 2013-10 | Marmara Tersanesi | Established <2000 | 03.12.2010 | Yilmar Shipping |
| 11 | N/A | GCargo | 11 | | 11 | DWT | 8,223 | 2013-03 | Marmara Tersanesi | Established <2000 | 01.08.2008 | Yilmar Shipping |
| 12 | N/A | GCargo | 11 | | 11 | DWT | 8,223 | 2013-05 | Marmara Tersanesi | Established <2000 | 01.08.2008 | Yilmar Shipping |
| 13 | N/A | Escort Tug | 265 | 484 | 5,218 | HP | 2,125 | 2012- | Med Marine Towage | Established 2000-10 | 01.01.2010 | Jadranski Pomorski |
| 14 | N/A | Harbour Tug | | | 5 | HP | 1,891 | 2012- | Sanmar Ltd | Established <2000 | 01.09.2010 | Seaspan Marine |
| 15 | N/A | Harbour Tug | | | 5 | HP | 1,891 | 2012- | Sanmar Ltd | Established <2000 | 01.09.2010 | Seaspan Marine |
| 16 | N/A | Harbour Tug | | | 5 | HP | 1,891 | 2012- | Sanmar Ltd | Established <2000 | 01.09.2010 | Seaspan Marine |
| 17 | 9 | Chem & Oil | 7,064 | 4,812 | 7,064 | DWT | 8,903 | 2012- | Soli Shipyard | Established 2000-10 | 01.11.2007 | Unknown Turkish |
| 18 | 28 | GCargo | 7,5 | | 7,5 | DWT | 6,486 | 2012-01 | Karadeniz Shipyd. | Established 2000-10 | 01.03.2009 | Unknown |
| 19 | 3 | GCargo | 3 | | 3 | DWT | 3,608 | 2012-01 | Kocatepe S/Y | Established <2000 | 01.02.2009 | Royal Amasus Hansen |
| 20 | 217 | Chem & Oil | 7,6 | 5,128 | 7,6 | DWT | 9,22 | 2012-01 | Anadolu Shipyard | Established <2000 | 01.12.2008 | Anadolu Kim. Tanker. |
| 21 | 221 | Chem & Oil | 6 | 3,954 | 6 | DWT | 7,992 | 2012- | Anadolu Shipyard | Established <2000 | 01.07.2008 | Anadolu Kim. Tanker. |
| 22 | 16 | Products | 7,05 | 4,681 | 7,05 | DWT | 5,934 | 2012-02 | Besiktas Shipyard | Established 2000-10 | 28.10.2009 | Palmali Shipping |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 23 | 17 | Products | 7,05 | 4,681 | 7,05 | DWT | 5,934 | 2012-06 | Besiktas Shipyard | Established 2000-10 | 28.10.2009 | Palmali Shipping |
| 24 | 18 | Products | 7,05 | 4,681 | 7,05 | DWT | 5,934 | 2012-07 | Besiktas Shipyard | Established 2000-10 | 28.10.2009 | Palmali Shipping |
| 25 | 19 | Products | 7,05 | 4,681 | 7,05 | DWT | 5,934 | 2012-10 | Besiktas Shipyard | Established 2000-10 | 28.10.2009 | Palmali Shipping |
| 26 | 49 | Bulk | 24,968 | 16 | 24,968 | DWT | 10,639 | 2012-03 | Cicek Shipyard | Established <2000 | 01.10.2008 | Deniz Endustrisi |
| 27 | 15 | Chem & Oil | 6,4 | | 6,4 | DWT | 7,907 | 2012-01 | Icdas Shipyard | Established 2000-10 | 01.09.2007 | Icdas Celik Enerji |
| 28 | 16 | Chem & Oil | 6,4 | | 6,4 | DWT | 7,907 | 2012-03 | Icdas Shipyard | Established 2000-10 | 01.09.2007 | Icdas Celik Enerji |
| 29 | 17 | Chem & Oil | 6,4 | | 6,4 | DWT | 7,907 | 2012-05 | Icdas Shipyard | Established 2000-10 | 01.09.2007 | Icdas Celik Enerji |
| 30 | 18 | Chem & Oil | 6,4 | | 6,4 | DWT | 7,907 | 2012-07 | Icdas Shipyard | Established 2000-10 | 01.09.2007 | Icdas Celik Enerji |
| 31 | 1 | Chem & Oil | 6,4 | 4,1 | 6,4 | DWT | 8,153 | 2012- | Unknown Yard /Turkey | Established <2000 | 01.07.2007 | Den-Ta Denizcilik |
| 32 | 68 | Chem & Oil | 13,5 | | 13,5 | DWT | 11,921 | 2012- | Yardimci Deniz | Established <2000 | 01.04.2008 | Yardimci Shpg. Group |
| 33 | 37 | MPP | 9,7 | 7,5 | 9,7 | DWT | 8,155 | 2012-04 | Madenci S/Y | Established <2000 | 01.07.2005 | Unknown |
| 34 | 118 | Chem & Oil | 6,25 | 4,236 | 6,25 | DWT | 8,301 | 2012-01 | Selay Shipyard | Established 2000-10 | 01.01.2006 | Selay Deniz. Sanayi |
| 35 | 119 | Chem & Oil | 6,25 | 4,236 | 6,25 | DWT | 8,301 | 2012-03 | Selay Shipyard | Established 2000-10 | 01.07.2007 | Selay Deniz. Sanayi |
| 36 | 120 | Chem & Oil | 6,25 | 4,236 | 6,25 | DWT | 8,301 | 2012-05 | Selay Shipyard | Established 2000-10 | 01.07.2007 | Selay Deniz. Sanayi |
| 37 | 121 | Chem & Oil | 6,25 | 4,236 | 6,25 | DWT | 8,301 | 2012-07 | Selay Shipyard | Established 2000-10 | 01.07.2007 | Selay Deniz. Sanayi |
| 38 | 122 | Chem & Oil | 6,25 | 4,236 | 6,25 | DWT | 8,301 | 2012-09 | Selay Shipyard | Established 2000-10 | 01.07.2007 | Selay Deniz. Sanayi |
| 39 | 123 | Chem & Oil | 6,25 | 4,236 | 6,25 | DWT | 8,301 | 2012-11 | Selay Shipyard | Established 2000-10 | 01.07.2007 | Selay Deniz. Sanayi |
| 40 | 128 | Chem & Oil | 3 | | 3 | DWT | 5,213 | 2012- | Selay Shipyard | Established 2000-10 | 01.09.2007 | Selay Deniz. Sanayi |
| 41 | 129 | Chem & Oil | 3 | | 3 | DWT | 5,213 | 2012- | Selay Shipyard | Established 2000-10 | 01.09.2007 | Selay Deniz. Sanayi |
| 42 | 130 | Chem & Oil | 3 | | 3 | DWT | 5,213 | 2012- | Selay Shipyard | Established 2000-10 | 01.09.2007 | Selay Deniz. Sanayi |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 43 | 131 | Chem & Oil | 3 | | 3 | DWT | 5,213 | 2012- | Selay Shipyard | Established 2000-10 | 01.09.2007 | Selay Deniz. Sanayi |
| 44 | 77 | Chem & Oil | 4,999 | 3,308 | 4,999 | DWT | 7,245 | 2012-01 | Yardimci Deniz | Established <2000 | 01.10.2007 | Yardimci Shpg. Group |
| 45 | 55 | Container | 12,5 | 9,5 | 1 | TEU | 9,63 | 2012-04 | Yardimci Deniz | Established <2000 | 01.07.2006 | Yardimci Shpg. Group |
| 46 | 56 | Container | 12,5 | 9,5 | 1 | TEU | 9,63 | 2012-04 | Yardimci Deniz | Established <2000 | 01.07.2006 | Yardimci Shpg. Group |
| 47 | 26 | Chem & Oil | 6,48 | 4,242 | 6,48 | DWT | 8,307 | 2012-07 | Desan Deniz | Established <2000 | 30.11.2007 | Kaptanoglu Shpg. Grp |
| 48 | 42 | Chem & Oil | 6,824 | 4,859 | 6,824 | DWT | 8,951 | 2012-01 | Tuzla Gemi | Established <2000 | 01.01.2006 | Unknown |
| 49 | 87 | Chem & Oil | 5,6 | 3,583 | 5,6 | DWT | 7,57 | 2012-01 | Celiktekne | Established <2000 | 01.10.2007 | KGS Denizcilik |
| 50 | 88 | Chem & Oil | 5,6 | 3,583 | 5,6 | DWT | 7,57 | 2012-03 | Celiktekne | Established <2000 | 01.10.2007 | KGS Denizcilik |
| 51 | 75 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2012-01 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 52 | 76 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2012-03 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 53 | 77 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2012-05 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 54 | 78 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2012-07 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 55 | 79 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2012-09 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 56 | 80 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2012-11 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 57 | 81 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2013-01 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 58 | 82 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2013-03 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 59 | 83 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2013-05 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 60 | 84 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2013-07 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 61 | 85 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2013-09 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 62 | 86 | Chem & Oil | 9 | | 9 | DWT | 9,538 | 2013-11 | Celiktekne | Established <2000 | 01.10.2007 | FORS Denizcilik |
| 63 | 63 | Chem & Oil | 6,138 | 3,999 | 6,138 | DWT | 8,042 | 2012-01 | Torlak Shipyard | Established <2000 | 01.09.2007 | MRC Shipping |
| 64 | 17 | Chem & Oil | 12 | | 12 | DWT | 11,173 | 2012-01 | Aykin Deniz. | Established <2000 | 01.09.2007 | MRC Shipping |
| 65 | 18 | Chem & Oil | 12 | | 12 | DWT | 11,173 | 2012-08 | Aykin Deniz. | Established <2000 | 01.09.2007 | MRC Shipping |
| 66 | 59 | Chem & Oil | 16,745 | 12,137 | 16,745 | DWT | 14,81 | 2012-01 | Turkter-Tersane | Established 2000-10 | 01.09.2007 | Yardimci Shpg. Group |
| 67 | 2052 | Chem & Oil | 11,259 | 7,321 | 11,259 | DWT | 11,215 | 2012- | Dearsan Shipyd. | Established <2000 | 01.07.2007 | Yardimci Shpg. Group |
| 68 | 2061 | Chem & Oil | 11,259 | 7,321 | 11,259 | DWT | 11,215 | 2012-01 | Dearsan Shipyd. | Established <2000 | 01.07.2007 | Yardimci Shpg. Group |
| 69 | 26 | Chem & Oil | 5,3 | | 5,3 | DWT | 7,413 | 2012-04 | Eregli Shipyard | Established <2000 | 12.10.2007 | John T. Essberger |
| 70 | 80 | Chem & Oil | 12,5 | | 12,5 | DWT | 11,427 | 2012-05 | Marmara Tersanesi | Established <2000 | 01.08.2007 | Yildirim Group |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 71 | 81 | Chem & Oil | 12,5 | | 12,5 | DWT | 11,427 | 2012-10 | Marmara Tersanesi | Established <2000 | 01.08.2007 | Yildirim Group |
| 72 | 36 | MPP | 9,7 | 7,5 | 9,7 | DWT | 8,155 | 2012-01 | Madenci S/Y | Established <2000 | 01.07.2005 | Unknown |
| 73 | 10 | Chem & Oil | 25 | 17,514 | 25 | DWT | 18,119 | 2012- | Eregli Shipyard | Established <2000 | 01.01.2007 | Med Marine |
| 74 | 9 | Chem & Oil | 8,28 | 5,651 | 8,28 | DWT | 9,726 | 2012-01 | Eregli Shipyard | Established <2000 | 01.01.2007 | Med Marine |
| 75 | 20 | Chem & Oil | 8,28 | 5,651 | 8,28 | DWT | 9,726 | 2012-03 | Eregli Shipyard | Established <2000 | 01.01.2007 | Med Marine |
| 76 | 30 | Chem & Oil | 8,28 | 5,651 | 8,28 | DWT | 9,726 | 2012-01 | Eregli Shipyard | Established <2000 | 01.01.2007 | Med Marine |
| 77 | 156 | Container | 26,811 | 21,092 | 1,878 | TEU | 16,564 | 2012-01 | Sedef Gemi End. | Established <2000 | 01.12.2006 | Kasif Kalkavan Group |
| 78 | 157 | Container | 26,811 | 21,092 | 1,878 | TEU | 16,564 | 2012-01 | Sedef Gemi End. | Established <2000 | 01.12.2006 | Kasif Kalkavan Group |
| 79 | 19 | Chem & Oil | 25 | 17,712 | 25 | DWT | 18,232 | 2012-01 | Admarin Shipyard | Established 2000-10 | 01.07.2007 | Galata Denizcilik |
| 80 | 90 | Chem & Oil | 4,9 | | 4,9 | DWT | 6,827 | 2012-01 | Ustaoglu Shipyard | Established <2000 | 01.01.2006 | Tanmarin Denizcilik |
| 81 | N/A | Chem & Oil | 4,9 | | 4,9 | DWT | 6,827 | 2012-04 | Ustaoglu Shipyard | Established <2000 | 01.01.2006 | Tanmarin Denizcilik |
| 82 | 35 | Container | 10,6 | 8,97 | 917 | TEU | 9,261 | 2012- | UM Deniz Shipyard | Established <2000 | 01.04.2005 | Volum Denizcilik |

***Source: Clarkson Research Ser. 02/2012***


PORTS

# CHAPTER IV

## PORT DEVELOPMENTS

### Ports Information in General

The coastline of Anatolia is 8333 Km long. Total numbers of ports are 175 along the coastline. 6 ports are operated by Turkish Maritime Administrations and 4 out of 7 railway connected ports are operated by Turkish State Railways.

According to regions determined by Republic of Turkey Ministry of Transport, Maritime Affairs and Communications; Ports are located as below;

| | |
|---|---|
| **ANTALYA REGION** | **7 PORTS** |
| **ÇANAKKALE REGION** | **24 PORTS** |
| **İSTANBUL REGION** | **79 PORTS** |
| **İZMIR REGION** | **22 PORTS** |
| **MERSİN REGION** | **18 PORTS** |
| **SAMSUN REGION** | **16 PORTS** |
| **TRABZON REGION** | **9 PORTS** |

and operated by;

| | |
|---|---|
| **GOVERNMENT** | **22 PORTS** |
| **MUNICIPALITY** | **27 PORTS** |
| **PRIVATE** | **126 PORTS** |

The major part of international trade is being realized through maritime transportation in Turkey. Approximately 90 % of goods (import-export) have been maritime transported in 2011

Theoretical capacity of Turkish ports are as below;

| Cargo Type | Theoretical Capacity |
|---|---|
| **Container** | **11.085.000 TEU** |
| **General Cargo + Dry Bulk Cargo** | **276.851.862 Tons** |
| **Liquid Bulk Cargo** | **148.900.782 Tons** |
| **Wheeled Cargo** | **3.674.800 Pcs** |

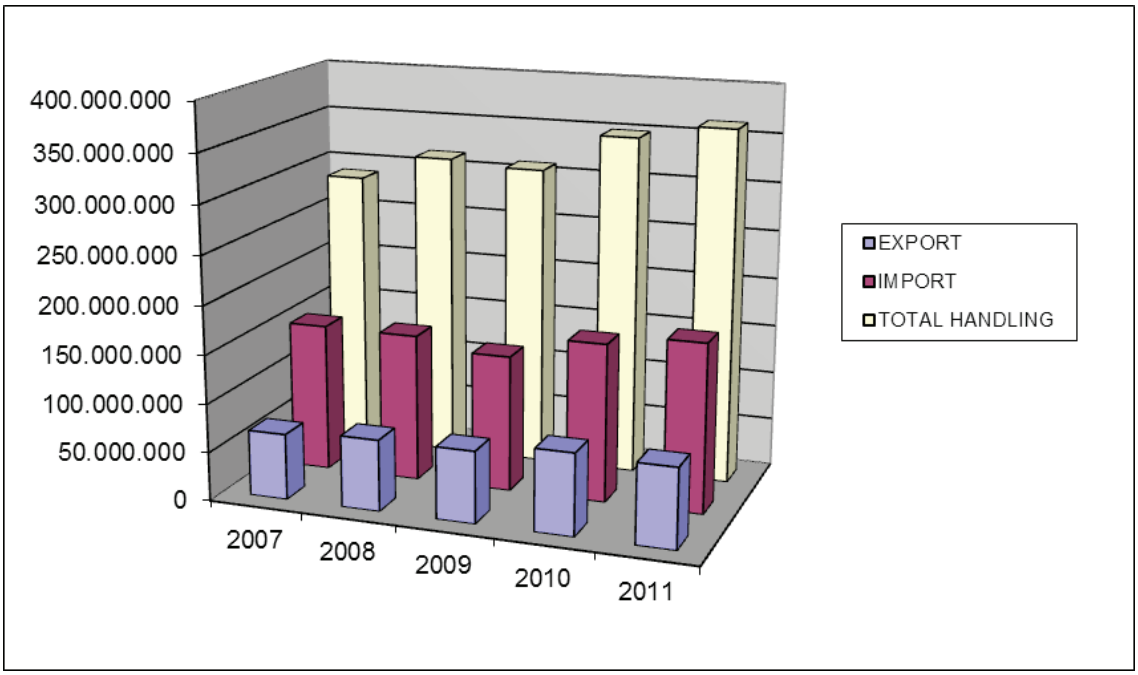
Table below shows total cargo handled at Turkish ports according to type of transportation in the last five years.

**TABLE (52): Cargo Handling Figures At Turkish Ports (Acc. to Transport Mode)**

| MODE OF TRANSPORT | | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| EXPORT | TURKISH | 9.761.897 | 10.654.742 | 9.578.520 | 11.615.686 | 12.273.915 |
| | FOREIGN | 57.835.842 | 62.590.230 | 64.191.743 | 72.329.476 | 69.502.777 |
| | **TOTAL** | **67.597.739** | **73.244.972** | **73.770.263** | **83.945.162** | **81.776.692** |
| IMPORT | TURKISH | 27.003.125 | 21.136.641 | 20.387.046 | 28.878.432 | 30.120.033 |
| | FOREIGN | 125.310.476 | 130.394.670 | 119.475.045 | 133.747.337 | 143.426.365 |
| | **TOTAL** | **152.313.601** | **151.531.311** | **139.862.090** | **162.625.769** | **173.546.398** |
| CABOTAGE | LOADING | 16.364.074 | 18.922.148 | 18.305.867 | 18.561.807 | 21.257.193 |
| | UNLOADING | 18.741.552 | 20.134.058 | 19.485.900 | 19.434.485 | 22.387.290 |
| | **TOTAL** | **35.105.626** | **39.056.206** | **37.791.767** | **37.996.292** | **43.644.483** |
| TRANSIT | LOADING | 30.593.600 | 50.744.950 | 58.012.586 | 58.767.061 | 58.603.055 |
| | UNLOADING | 2.473.350 | - | - | 5.355.657 | 5.776.095 |
| | **TOTAL** | **33.066.950** | **50.744.950** | **58.012.586** | **64.122.718** | **64.379.150** |
| GR.TOTAL | LOADING | 114.555.413 | 142.912.070 | 150.088.716 | 161.274.030 | 161.636.940 |
| | UNLOADING | 173.528.503 | 171.665.369 | 159.347.990 | 187.415.911 | 201.709.783 |
| | **TOTAL** | **288.083.916** | **314.577.439** | **309.436.706** | **348.689.941** | **363.346.723** |

*Source: Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

**GRAPH 53: Cargo Handling Figures According To Years**




The goal of Turkey is to become a centre for transit cargoes in the region. The strategical position of Turkey is increasing after the pipe lines like Baku-Tiflis-Ceyhan, and projects like Nabucco Gas Pipeline and South East Anatolia Project (GAP). Privatized and modernized ports will also add strength to its position.

The major problems beyond the insufficient ratio of transit cargo movements, are disharmony to technological developments and insufficient railway integrations to ports that will supply cargoes to be distributed fast and on time.

363.346.723 tons of cargo is realized at Turkish ports in 2011.

- 22,5 % of handling is export with 81.776.692 tons.
- 47,8 % of handling is import with 173.546.398 tons.
- 12 % of handling is cabotage with 43.644.483 tons.
- 17,7 % of handling is transit with 64.379.150 tons.

Port sector is a very dynamic sector in Turkey as it is in all World. Developments in World economy, directly influence goods and service trade and specially expectations on goods' trade effect investment plans of ports that are most important transportation infrastructures. Increasing expactations on goods and service trade in medium and long term speed up port investments as well as decline in these expectations may cause to postpone investments.

Nowadays ports, in classic terms are not the loading/discharging point of ships, they have become Logistic Centers where, with development of multimodal shipping, various transportation modes intersect. Ports are in a dynamic development, growth and renewing trend as they are obliged to cover the expectations and demands of partners in this system. However this trend might come to a halt by reasons like economic crisis. Thus in crisis period many port operators suspended their investments in Turkey. But since the last quarter of 2009 increase in goods and service trade, encouraged port operators to make investments. There are two options for increaing the capacity of Ports, these are: Existing ports' increasing their efficiency and making physical investments. As to physical investments consist;

- Developing physical conditions of port by adding new jetties and back fields,
- Increasing handling capacity of port by having new equipments.

Both options ultimately provides increase of port's cargo and ship reception capacity. Within these two coverages, explained capacity and improvings in the forthcoming years for the existing and newly planned ports are shown below.

| Port/Facility | Type of Cargo | Existing Capacity | End of Project |
|---|---|---|---|
| Borusan Lojistik | Container | 400,000 TEU | 650,000 TEU (2015) |
| | General Cargo | 5,000,000 Tons | 6,500,000 Tons (2015) |
| Delta Petrol | Liquid | 612,500 m³ | 1,000,000 m³ (2012) |
| Ege Gübre | Container | 400,000 TEU | 600,000 TEU |
| Evyap | Container | 600,000 TEU | 1,200,000 TEU (2015) |
| Gemport | Container | 350,000 TEU | 600,000 TEU (2011) |
| Mersin | Container | 850,000 TEU | 1,700,000 TEU (2012) |
| İsdemir | Container | - | 2,200,000 TEU (2015) |
| Toros Tarım (Ceyhan) | General Cargo | 15,000,000 Tons | 25,000,000 Tons |
| | Liquid Bulk Cargo | 235,000 m³ | 1,500,000 m³ |
| Toros Tarım (Samsun) | Solid Bulk/ General Cargo | 3,300,000 Tons | 8,500,000 Tons |
| Yılport | Container | 450,000 TEU | 2,500,000 TEU (2015) |
| | General Cargo | 2,500,000 Tons | 4,000,000 Tons |
| | Liquid | 500,000 m³ | 1,000,000 m³ (2015) |
| Asya Port | Container | - | 1,900,000 TEU (2013) |
| Aksa | General Cargo | - | 4,000,000 Tons |
| DP World | Container | - | 1,300,000 TEU |
| Solventaş | Liquid | 4,000,000 m³ | 5,000,000 m³ (2014) |
| Derince | Container | - | 250,000 TEU |
| Batıçim | Container | - | 300,000 TEU (2015) |
| | General Cargo | 6,000,000 Tons | 7,500,000 Tons (2015) |
| İgsaş | General Cargo | 2,000,000 Tons | 2,500,000 Tons (2015) |
| Altıntel | General Cargo | 1,000,000 Tons | 5,000,000 Tons (2105) |
| | Liquid | 1,500,000 m³ | 6,000,000 m³ (2015) |
| Roda | Container | 120,000 TEU | 200,000 TEU (2012) |
| | General Cargo | 2,000,000 Tons | 2,500,000 Tons (2012) |
| İzmir Alsancak | Container | 750,000 TEU | 2,100,000 TEU (2020) |

Additional capacity increase and new port investments generally aim at 2015. In case of realization of these targets Turkey's existing 11.1 million TEU capacity is expected to reach 21.6 million TEU by 2015 with an increase of 10.5 million TEU. Parallel to cargo increase most investments are planned in the Marmara Region (6,7 million TEU), followed by the Meditteranean (2,2 million TEU) and the Aegean Sea (1,6 million TEU).

Likewise, investment plans of general and dry cargo handling ports, aim at enhancing Turkey's total capacity to 305 million tons by increasing the existing capacity with 28,2 million tons. As of liquid bulk cargo, additional capacity untill 2015 will be 7,7 million cubic meters.

Turkish ports should go into an expertising process on certain types of cargoes and/or new port projects for container handling so as to become more competitive in the Mediterranean and Black Sea markets. Recently private container terminals increased specially in the Marmara Region.

Turkish ports hold stratejic position within the Eastern Mediterranean and Black Sea Shipping Lines and at the intersection point of East-West and North-South directional international transport corridors. They are in an advantageous position to attract transshipment/transit cargoes. Ports in all regions of Turkey are so located that they can serve to different transportation nets. The Mediterranean and Aegean Sea ports are located with little miss distance and have ability to attract Asian-European main shipping lines' cargoes passing through the Mediterranean. Specially, the Mediterranean ports are in a position to operate as transshipment/transit ports for delivering cargoes coming from main shipping lines to Middle East and Central Asian countries. Meanwhile Ports in the Marmara Region are important in terms of Turkish connection of Trans-European and Pan-European transport corridors formed by EU and extending those corridors to East. As a result of growing trade and transport volume in Black Sea which is the most important means of access for trading among the landlocked Central Asian countries with Europe, the importance of our ports in the area have increased.

**TABLE (53):Handling Figures of Turklim Member Ports TCDD Ports And Others**

**CONTAINER (TEUS)**

| | 2007 | % | 2008 | % | 2009 | % | 2010 | % | 2011 | % |
|---|---|---|---|---|---|---|---|---|---|---|
| TURKLIM Members | 3.389.876 | 72,13% | 3.964.373 | 75,83% | 3.485.468 | 77,10% | 4.932.869 | 84,1% | 5.679.049 | 85,88% |
| TCDD Ports | 1.299.308 | 27,65% | 1.241.640 | 23,75% | 1.014.261 | 22,43% | 904.258 | 15,42% | 897.036 | 13,56% |
| Others | 10.345 | 0,22% | 22.141 | 0,42% | 21.057 | 0,47% | 28.658 | 0,48% | 36.950 | 0,56% |
| TOTAL | 4.699.529 | 100,00% | 5.228.154 | 100,00% | 4.520.786 | 100,00% | 5.865.785 | 100,00% | 6.613.035 | 100,00% |

**GENERAL AND BULK CARGO (TON)**

| | 2007 | % | 2008 | % | 2009 | % | 2010 | % | 2011 | % |
|---|---|---|---|---|---|---|---|---|---|---|
| TURKLIM Members | 61.365.612 | 66,66% | 64.782.826 | 67,61% | 61.970.360 | 88,19% | 73.829.860 | 72,52% | 76.690.158 | 92,83% |
| TCDD Ports | 7.576.826 | 8,23% | 7.073.936 | 7,37% | 5.449.558 | 7,76% | 7.277.001 | 7,15% | 5.922.616 | 7,17% |
| Others (×) | 23.114.992 | 25,11% | 24.110.277 | 25,12% | 2.845.898 | 4,05% | 20.705.912 | 20,33% | | 0,00% |
| TOTAL | 92.057.430 | 100,00% | 99.670.340 | 100,00% | 76.053.292 | 100,00% | 101.812.773 | 100% | 82.612.774 | 100% |

(×) Incl. Ports of which info could be obtained

**LIQUID CARGO (TON)**

| | 2007 | % | 2008 | % | 2009 | % | 2010 | % | 2011 | % |
|---|---|---|---|---|---|---|---|---|---|---|
| TURKLIM Members | 12.306.397 | 91,37% | 10.988.112 | 71,70% | 12.675.876 | 90,07% | 14.040.662 | 88,92% | 12.791.433 | 92,52% |
| TCDD Ports | 1.161.891 | 8,63% | 1.220.516 | 7,25% | 1.109.185 | 7,88% | 981.683 | 6,22% | 1.033.477 | 7,48% |
| Others (×) | | | 3.226.768 | 21,06% | 288.789 | 2,05% | 767.080 | 4,86% | | 0,00% |
| TOTAL | 13.468.288 | 100,00% | 15.435.396 | 100,00% | 14.073.850 | 100,00% | 15.789.425 | 100,00% | 13.824.910 | 100,00% |

(×) Incl. Ports of which info could be obtained
Liquid bulks except crude oil are included

**VEHICLE**

| TURKLİM Members | CONS. EQ | BUS | TRUCK | CAR | OTHER | TOTAL |
|---|---|---|---|---|---|---|
| 2007 | 371 | 380 | 208.134 | 643.885 | 2 | 852.772 |
| 2008 | 364 | 411 | 262.294 | 671.343 | 23.999 | 958.411 |
| 2009 | 783 | 243 | 256.879 | 646.470 | 36.806 | 941.181 |
| 2010 | 2.543 | 0 | 531.472 | 844.243 | 57.819 | 1.436.077 |
| 2011 | 2.440 | 1.780 | 646.563 | 904.373 | 56.035 | 1.611.191 |

*Source: TURKLIM*




## TDI Ports and Privatizations

**TABLE (54): The Ports Operated By Turkish Maritime Administrations (TDİ)**

| PORTS | PIER LENGTH (Meters) | DEPTH (Meters) | HANDLING CAPACITY (000x ton/year) | SHIP CAPACITY (number/years) | STORAGE CAPACITY (000x ton/year) | PASSANGER CAPACITY (person/years) |
|---|---|---|---|---|---|---|
| İSTANBUL | 1.386,00 | (-8,-12) | - | 3.950 | - | 3.860.000 |
| ÇANAKKALE | 90,00 | (-6,-7) | 300 | 365 | - | 110.000 |
| LAPSEKİ | 106,00 | (-6,-8) | 100 | 100 | 10 | - |
| KABATEPE | 295,00 | (-4,-5) | - | 365 | - | 90.000 |
| GÖKÇEADA (Port of Kuzu) | 900,00 | (-6,-7) | 400 | 700 | 200 | 200.000 |
| GÖKÇEADA (Uğurlu Pier) | 76,00 | (-6,-8) | - | 365 | - | - |
| **TOTAL** | **2.853,00** | | **800** | **5.845** | **210** | **4.260.000** |

*Source: TDI*

- In 1997, Ports of Tekirdağ, Rize, Ordu, Sinop, Giresun and Hopa
- In 1998, Port of Antalya,
- In 2000, Ports of Marmaris and Alanya
- In 2003, Ports of Çeşme, Kuşadası, Trabzon and Dikili,

have been privatized,by the method of conveying the right of exploitation for 30years.

## TCDD Ports and Privatizations

**Table 55: Specifications and Capacities of TCDD Ports**

| Ports | Total Wharf Length (m) | Port Area (*1000 m2) | Max. Draught (m) | Number of Workers | Total Ship Receipt (Ship/Year) | Total Handling Capacity (*1000 Tons/Year) | Total Wharf Capacity (*1000 Tons/Year) | Capacity of Container Wharf Equipment (*1000 TEU) | Storage Capacity (*1000 Tons/Year) | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | General Cargo | Cont. |
| Ports Operated By TCDD; | | | | | | | | | | |
| Haydarpasa | 2765 | 320 | -12 | 600 | 2651 | 5889 | 8558 | 407 | 689 | 269 |
| Izmir | 3386 | 525 | -13 | 682 | 3640 | 6419 | 11100 | 549 | 884 | 343 |
| Derince | 1092 | 366 | -15 | 308 | 862 | 2288 | 2991 | 40 | 2984 | 100 |
| Privitazed Ports; | | | | | | | | | | |
| Mersin (MIP) | 4725 | 1097 | -14 | 1550 | 4692 | 8606 | 10967 | 695 | 8500 | 371 |
| Samsun (Samsunport) | 1756 | 338 | -12 | 146 | 1130 | 2380 | 4300 | 40 | 5471 | 50 |
| Bandırma (Çelebi) | 2706 | 250 | -12 | 180 | 4280 | 2771 | 7008 | 40 | 2013 | 50 |
| Iskenderun | 1426 | 750 | -12 | 341 | 640 | 3247 | 6097 | 20 | 9286 | 146 |
| **TOTAL** | **17.856** | **3.646** | | **3.807** | **17.895** | **31.600** | **51.021** | **1.791** | **29.827** | **1.329** |

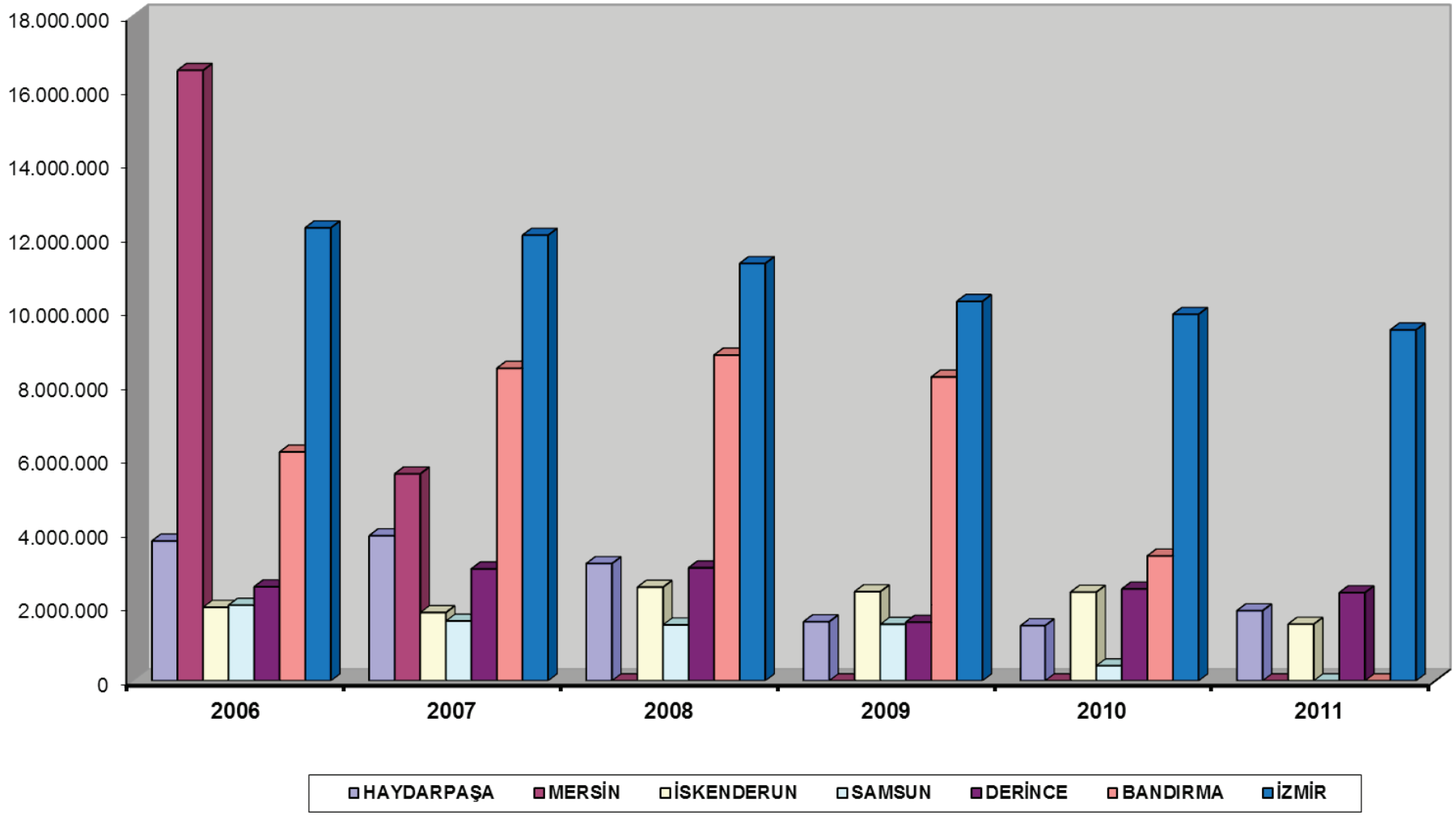
***Source: TCDD***

## TABLE (56): TCDD Ports 2006-2011 Handling Figures Acc. To Cargo Groups

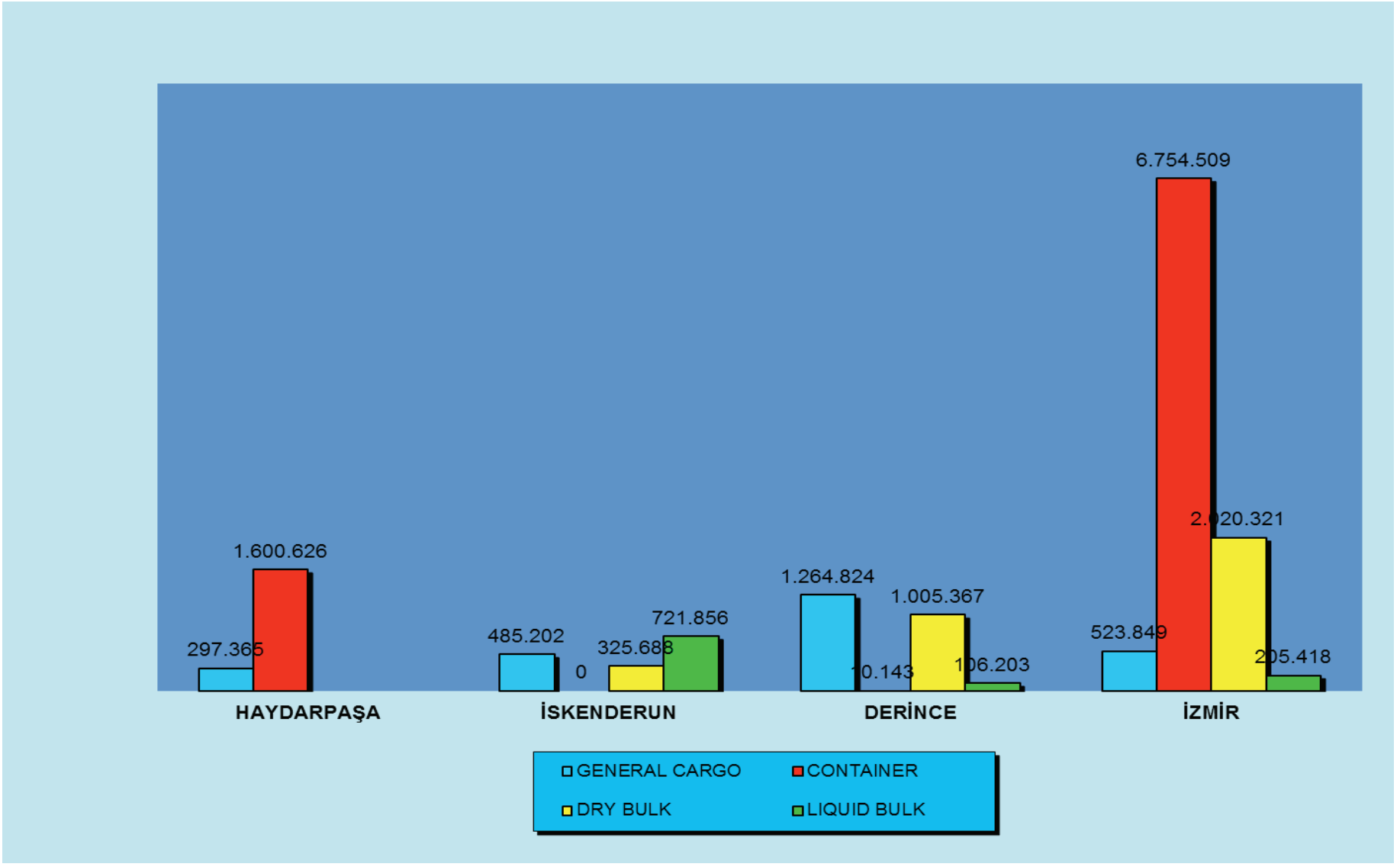
| PORT | YEAR | GENERAL CARGO | CONTAINER | DRY BULK | LIQUID BULK | TOTAL |
|---|---|---|---|---|---|---|
| HAYDARPAŞA | 2006 | 74.091 | 3.711.503 | 0 | 0 | 3.785.594 |
| | 2007 | 650.820 | 3.277.365 | 0 | 0 | 3.928.185 |
| | 2008 | 40.559 | 3.132.790 | 0 | 0 | 3.173.349 |
| | 2009 | 40.136 | 1.557.784 | 0 | 0 | 1.597.920 |
| | 2010 | 31.684 | 1.435.678 | 24499 | 0 | 1.491.861 |
| | 2011 | 297.365 | 1.600.626 | 0 | 0 | 1.897.991 |
| MERSİN | 2006 | 1.276.260 | 7.181.091 | 2.971.386 | 5.105.014 | 16.533.751 |
| | 2007 | 378.177 | 2.428.451 | 1.273.370 | 1.524.534 | 5.604.532 |
| | 2008 | 0 | 0 | 0 | 0 | 0 |
| | 2009 | 0 | 0 | 0 | 0 | 0 |
| | 2010 | 0 | 0 | 0 | 0 | 0 |
| | 2011 | 0 | 0 | 0 | 0 | 0 |
| İSKENDERUN | 2006 | 241.133 | 0 | 842.284 | 905.051 | 1.988.468 |
| | 2007 | 368.151 | 1.021 | 607.619 | 869.947 | 1.846.738 |
| | 2008 | 775.363 | 0 | 996.755 | 763.138 | 2.535.256 |
| | 2009 | 730.671 | 0 | 827.299 | 855.373 | 2.413.343 |
| | 2010 | 793.774 | 689 | 823.830 | 782.213 | 2.400.506 |
| | 2011 | 485.202 | 0 | 325.688 | 721.856 | 1.532.746 |
| SAMSUN | 2006 | 879.027 | 0 | 1.149.035 | 18.229 | 2.046.291 |
| | 2007 | 896.596 | 0 | 688.703 | 31.006 | 1.616.305 |
| | 2008 | 797.021 | 0 | 661.990 | 54.100 | 1.513.111 |
| | 2009 | 705.281 | 3.440 | 787.266 | 33.019 | 1.529.006 |
| | 2010 | 187.930 | 794 | 209.691 | 6.230 | 404.645 |
| | 2011 | 0 | 0 | 0 | 0 | 0 |
| DERİNCE | 2006 | 1.374.072 | 4.915 | 1.073.113 | 92.662 | 2.544.762 |
| | 2007 | 1.734.764 | 3.603 | 1.215.897 | 76.772 | 3.031.036 |
| | 2008 | 1.966.399 | 3.178 | 983.982 | 104.789 | 3.058.348 |
| | 2009 | 964.081 | 2.370 | 570.856 | 49.410 | 1.586.717 |
| | 2010 | 1.071.481 | 6.214 | 1.356.534 | 51.031 | 2.485.260 |
| | 2011 | 1.264.824 | 10.143 | 1.005.367 | 106.203 | 2.386.537 |
| BANDIRMA | 2006 | 4.348.701 | 0 | 1.733.899 | 113.531 | 6.196.131 |
| | 2007 | 5.557.147 | 156 | 2.768.107 | 139.433 | 8.464.843 |
| | 2008 | 5.719.067 | 508 | 2.875.799 | 226.746 | 8.822.120 |
| | 2009 | 5.787.476 | 175 | 2.232.264 | 206.894 | 8.226.809 |
| | 2010 | 2.177.071 | 0 | 1.113.763 | 90.500 | 3.381.334 |
| | 2011 | 0 | 0 | 0 | 0 | 0 |
| İZMİR | 2006 | 586.881 | 8.274.042 | 3.044.234 | 364.776 | 12.269.933 |
| | 2007 | 692.052 | 8.858.429 | 2.304.523 | 213.172 | 12.068.176 |
| | 2008 | 717.219 | 8.750.429 | 1.593.619 | 242.589 | 11.303.856 |
| | 2009 | 379.198 | 7.751.632 | 1.942.878 | 204.402 | 10.278.110 |
| | 2010 | 485.805 | 6.995.792 | 2.296.522 | 148.439 | 9.926.558 |
| | 2011 | 523.849 | 6.754.509 | 2.020.321 | 205.418 | 9.504.097 |
| TOTAL | 2006 | 8.780.165 | 19.171.551 | 10.813.951 | 6.599.263 | 45.364.930 |
| | 2007 | 10.277.707 | 14.569.025 | 8.858.219 | 2.854.864 | 36.559.815 |
| | 2008 | 10.015.628 | 11.886.905 | 7.112.145 | 1.391.362 | 30.406.040 |
| | 2009 | 8.606.843 | 9.315.401 | 6.360.563 | 1.349.098 | 25.631.905 |
| | 2010 | 4.747.745 | 8.439.167 | 5.824.839 | 1.078.413 | 20.090.164 |
| | 2011 | 2.571.240 | 8.365.278 | 3.351.376 | 1.033.477 | 15.321.371 |

** Mersin Port 2007 Tonnage is till end of April*
** Samsun Port 2010 Tonnage is till end of March*
** Bandırma Port was handed over to Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş. on 18.05.2010.*

## GRAPH (54): TCDD Ports 2006 – 2011 Handling Figures



## GRAPH (55): 2011 TCDD Ports Handling Acc. To Cargo Groups

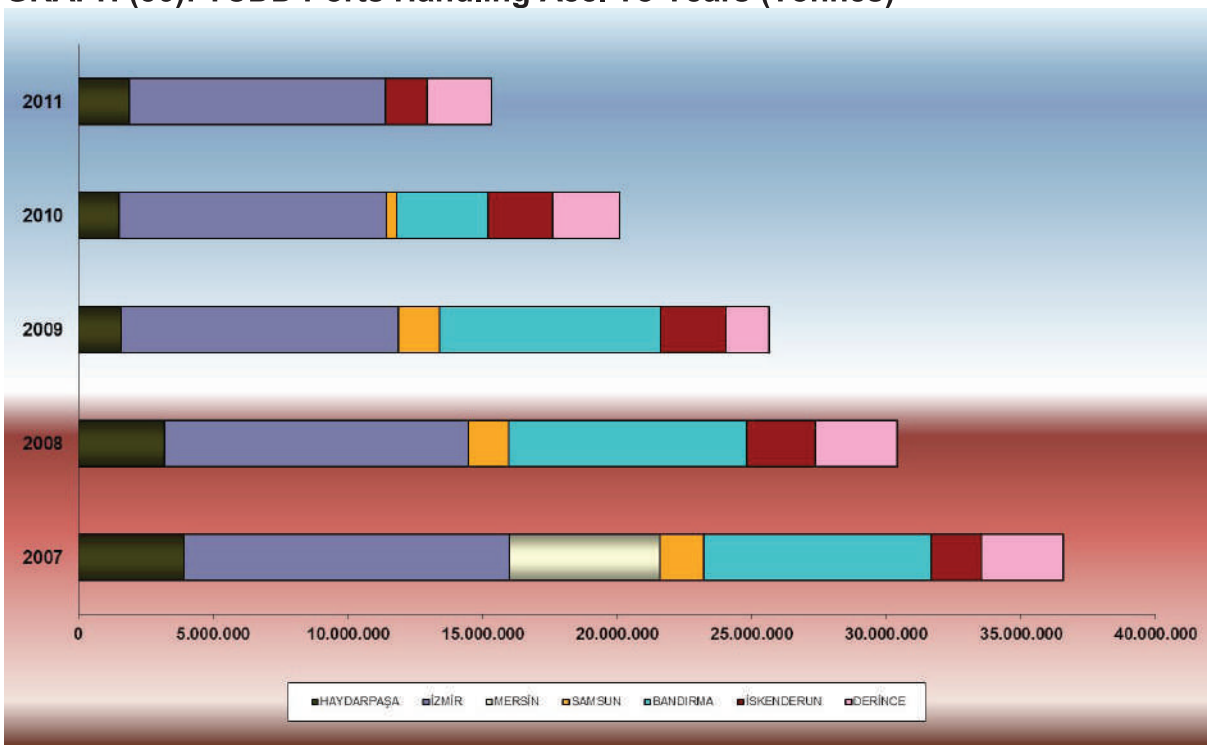


## Table (57): TCDD Ports Loading And Unloading Figures

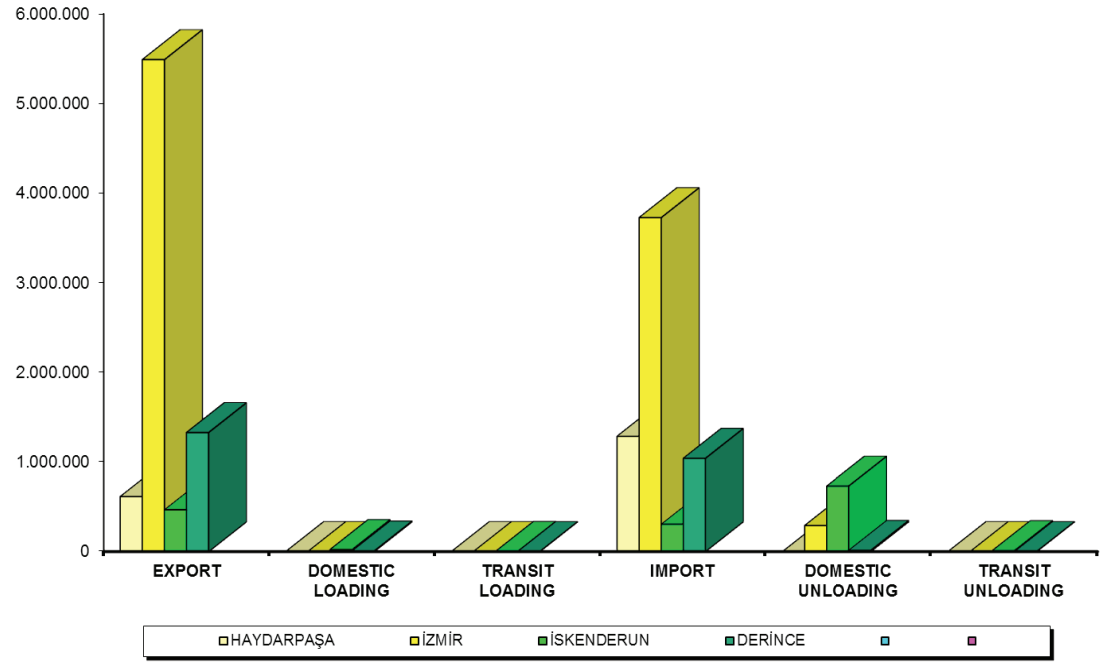
| YEARS | LOADING | | | UNLODAING | | | TOTAL |
|---|---|---|---|---|---|---|---|
| | EXPORT | DOMESTIC | TRANSIT | IMPORT | DOMESTIC | TRANSIT | |
| **HAYDARPAŞA** | | | | | | | |
| 2007 | 1.065.764 | 310.685 | 0 | 2.259.776 | 291.960 | 0 | 3.928.185 |
| 2008 | 1.133.144 | 0 | 0 | 2.039.605 | 600 | 0 | 3.173.349 |
| 2009 | 537.233 | 949 | 0 | 1.056.288 | 3450 | 0 | 1.597.920 |
| 2010 | 403.616 | 20515 | 0 | 1.067.730 | 0 | 0 | 1.491.861 |
| **2011** | **612.846** | **0** | **0** | **1.285.145** | **0** | **0** | **1.897.991** |
| **İZMİR** | | | | | | | |
| 2007 | 7.724.318 | 15.355 | 0 | 4.180.422 | 148.081 | 0 | 12.068.176 |
| 2008 | 7.135.766 | 0 | 0 | 4.073.723 | 94.367 | 0 | 11.303.856 |
| 2009 | 7.048.167 | 0 | 0 | 3.122.568 | 107.375 | 0 | 10.278.110 |
| 2010 | 6.340.777 | 0 | 0 | 3.308.371 | 277.410 | 0 | 10.278.110 |
| **2011** | **5.488.035** | **0** | **0** | **3.725.904** | **290.158** | **0** | **9.504.097** |
| **MERSİN** | | | | | | | |
| 2007 | 2.119.530 | 6.100 | 150.145 | 2.804.897 | 222.208 | 301.652 | 5.604.532 |
| 2008 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2009 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2010 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **2011** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| **SAMSUN** | | | | | | | |
| 2007 | 531.109 | 6.990 | 0 | 1.042.818 | 31.171 | 4.217 | 1.616.305 |
| 2008 | 497.155 | 0 | 0 | 996.868 | 13.670 | 5.418 | 1.513.111 |
| 2009 | 566.951 | 0 | 0 | 957.831 | 2.453 | 1.771 | 1.529.006 |
| 2010 | 150.598 | 988 | 0 | 248.093 | 4.667 | 299 | 404.645 |
| **2011** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| **BANDIRMA** | | | | | | | |
| 2007 | 761.558 | 3.035.399 | 2.000 | 1.908.423 | 2.755.463 | 2.000 | 8.464.843 |
| 2008 | 831.194 | 2.980.449 | 1.430 | 2.125.593 | 2.882.024 | 1.430 | 8.822.120 |
| 2009 | 676.922 | 3.075.320 | 0 | 1.616.595 | 2.857.972 | 0 | 8.226.809 |
| 2010 | 298.149 | 1.125.521 | 0 | 923.863 | 1.033.801 | 0 | 3.381.334 |
| **2011** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| **İSKENDERUN** | | | | | | | |
| 2007 | 365.121 | 1.457 | 406 | 622.762 | 834.604 | 22.388 | 1.846.738 |
| 2008 | 695.983 | 11.442 | 33.318 | 1.002.140 | 739.022 | 53.351 | 2.535.256 |
| 2009 | 782.031 | 42.230 | 558 | 710.119 | 861.367 | 17.038 | 2.413.343 |
| 2010 | 836.452 | 85.301 | 269 | 668.723 | 790.185 | 19.576 | 2.400.506 |
| **2011** | **465.918** | **21.025** | **1.676** | **304.453** | **729.548** | **10.126** | **1.532.746** |
| **DERİNCE** | | | | | | | |
| 2007 | 843.687 | 1.234 | 0 | 2.185.773 | 342 | 0 | 3.031.036 |
| 2008 | 1.061.350 | 162 | 4.922 | 1.989.065 | 599 | 2.250 | 2.224.344 |
| 2009 | 787.645 | 0 | 704 | 759.747 | 38.368 | 253 | 1.586.717 |
| 2010 | 1.580.194 | 0 | 0 | 884.841 | 20.094 | 131 | 2.485.260 |
| **2011** | **1.327.729** | **6.164** | **96** | **1.040.057** | **12.491** | **0** | **2.386.537** |
| **TOTAL** | | | | | | | |
| 2007 | 13.411.087 | 3.377.220 | 152.551 | 15.004.871 | 4.283.829 | 330.257 | 36.559.815 |
| 2008 | 11.354.592 | 2.992.053 | 39.670 | 12.226.994 | 3.730.282 | 62.449 | 30.406.040 |
| 2009 | 10.398.949 | 3.118.499 | 1.262 | 8.223.148 | 3.870.985 | 19.062 | 25.631.905 |
| 2010 | 9.609.786 | 1.232.325 | 269 | 7.101.621 | 2.126.157 | 20.006 | 20.441.716 |
| **2011** | **7.894.528** | **27.189** | **1.772** | **6.355.559** | **1.032.197** | **10.126** | **15.321.371** |

** Mersin Port 2007 Tonnage is till end of April*
** Samsun Port 2010 Tonnage is till end of March*
** Bandırma Port was handed over to Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş. on 18.05.2010.*

## GRAPH (56): TCDD Ports Handling Acc. To Years (Tonnes)




## GRAPH (57): 2011 TCDD Ports Cargo Handling Acc. To Transportation Modes




***Source: TCDD***

## Haydarpaşa Port




Haydarpaşa Port is in the province of İstanbul which is one of the most important metropolises. İstanbul is not only the most industrialized region but it has also the foremost cultural sightseeing and fascinating historical artifacts. İstanbul is known as an open air museum in the world.

Haydarpaşa is in the meeting point of and in the area covering Black Sea Countries and the waterway of Rhein-Main-Danube Canal and it is gaining substantial importance in this aspect.

Haydarpaşa port has all modes of transport such as sea, rail and land road. It renders services 24 hours, the length of berths is 2,675 meters, ships receipt capacity is 2,213 per year, and also container handling capacity is 360.000 TEU.

***Port Capacities***

| | *Ship Receipt Ships/Year* | *Berth Length (m)* | *Max. Depth (-m)* |
|---|---|---|---|
| **General Cargo** | 1,134 | 1,688 | 6, 10 |
| **Container** | 1,200 | 650 | 12 |
| **Dry Bulk** | 79 | 190 | 10 |
| **Ro-Ro** | 238 | 141 | 8 |
| **Total** | 2,651 | 2,669 | |

| *Storage Area* | *m²* | **Capacity** |
|---|---|---|
| **Open (Tons/Year)** | 17,390 | 417,360 |
| **Closed (Tons/Year)** | 20,502 | 329,152 |
| **Container (TEU/Year)** | 164,360 | 211,200 |
| **InlandTerminal(TEU /Year)** | 55,000 | 542,800 |

**Derince Port**




As an import and export gate for Izmit industrial hinterland, Derince Port is located in the East Marmara Sea. With a regular train ferry services between Derince Port and Costanta Port of Romania, the port gives an opportunity for combined transport of rail and sea

**Port Capacities**

| | *Ships/Year* | *Berth Lenght (m)* | *Max. Depth (-m)* |
|---|---|---|---|
| **Container** | 300 | 200 | 14 |
| **Dry Cargo** | 324 | 752 | 6, 10 |
| **Ro-Ro** | 238 | 140 | 14 |
| **Total** | 862 | 1,092 | |

| *Storage Area* | *m²* | **Capacity** |
|---|---|---|
| **Open (Tons/Year)** | 122,990 | 2,952,000 |
| **Closed (Tons/Year)** | 2,000 | 32,000 |

**İzmir Port**




İzmir Port faces the Aegean Sea and is situated at the pivotal point of the sea trade between Western Europe and North Africa. It has a vast agricultural and industrial hinterland, plays a substantial role not only essential core for the industry and agricultural trade in the Aegean Region but also as a vital function in the Turkish exports.

İzmir port, having a modern container terminal, maintains all the services for general, dry and liquid bulk cargoes, Ro-Ro and cruises with its infrastucture and skilled manpower.

**Port Capacities**

| | *Ships/Year* | *Berth Lenght (m)* | *Max. Depth (-m)* |
|---|---|---|---|
| **Dry Cargo** | 810 | 1,429 | 7, 10.5 |
| **Container** | 1,500 | 1,050 | 13 |
| **Dry Bulk** | 79 | 150 | 10.5 |
| **Passenger** | 1,246 | 330 | 8, 10.5 |
| **Total** | 3,635 | 2,959 | |

| *Storage Area* | *m²* | *Kapasite* |
|---|---|---|
| **Open (Tons/Year)** | 23,580 | 565,000 |
| **Closed (Tons/Year)** | 24,678 | 394,848 |
| **Container (TEU/Year)** | 192,360 | 266,000 |

## Port Privatizations of Turkish Railways

### Privatization Completed Ports

| PORT NAME | DATE OF APPR. | DATE OF SIGN. | PRICE ($) |
|---|---|---|---|
| MERSİN | 07.11.2005 | 11.05.2007 | 755 MILLION USD |
| BANDIRMA | 19.09.2008 | 18.05.2010 | 175,5 MILLION USD |
| SAMSUN | 19.09.2008 | 31.03.2010 | 125,2 MILLION USD |
| İSKENDERUN | 07.01.2011 | 30.12.2011 | 372 MILLION USD |

### Privatization Tender Cancelled Port

| PORT NAME | DATE OF TENDER | CANCELLING DATE OF TENDER |
|---|---|---|
| DERİNCE | 21.06.2007 | 14.06.2010 |
| İZMİR | 03.05.2007 | 28.04.2010 |

## Privatized TCDD Ports

**Mersin International Port (MIP)**

Strategic Location

MIP is an international port embracing The Middle East and Europe in The Eastern Mediterranean Sea.

Mersin International Port (MIP) serves all the trading regimes including import, export, transit, transshipment and cabotage. Mersin is situated in Mersin Bay, a broad body of water that is open southward to The Mediterranean. It is the main port for the Eastern Mediterranean Region's industry and agriculture. The port's rail link and its easy access to the international highway makes it an ideal transit port for trade to the Middle East and Black Sea regions. With its modern infrastructure and equipments, efficient cargo handling, vast storage areas and its proximity to the Free Trade Zone, Mersin is one the most important ports in Eastern Mediterranean.

Mersin International Port (MIP) is linked by railway and highways to Turkey's industrialized cities such as Gaziantep, Kayseri, Kahramanmaraş, Konya and to countries at borders such as Syria, Iraq and Iran. MIP is one of the most important container gateways in the Mediterranean Region with excellent transshipment and hinterland connections to the Middle East and Black Sea. Parallel to the development of logistics sector across the world, efforts are in progress to make Mersin a leading logistics centre.




By being one of the most important ports in The Eastern Mediterranean and with its vast hinterland, committed human resources and easy access, MIP handles a considerable portion of Turkey's export & import volumes. Eastern Anatolia, Southeastern and Central Anatolia Regions choose MIP for their import and export activities. MIP is a port of choice for transit and transshipment operations fulfilled by dedicated and experienced staff with a service quality being at international standards.

## Access by railroad

MIP is connected directly to the Turkish rail network providing connection to the major industrialised cities such as Gaziantep, Kayseri, Kahramanmaraş and Konya, as well as to international destinations. MIP has constructed a dedicated rail terminal with 4 railway lines of 2 km in length for container operations.

## Access by highway

MIP has highway connections to the major industrialised cities such as Gaziantep, Kayseri, Kahramanmaraş and Konya. Highway serves also as efficient transportation mechanism in the international destinations.

## Free Port Zone

The Mersin Free Port Zone is located adjacent to MIP and is connected by a direct road for convenience.

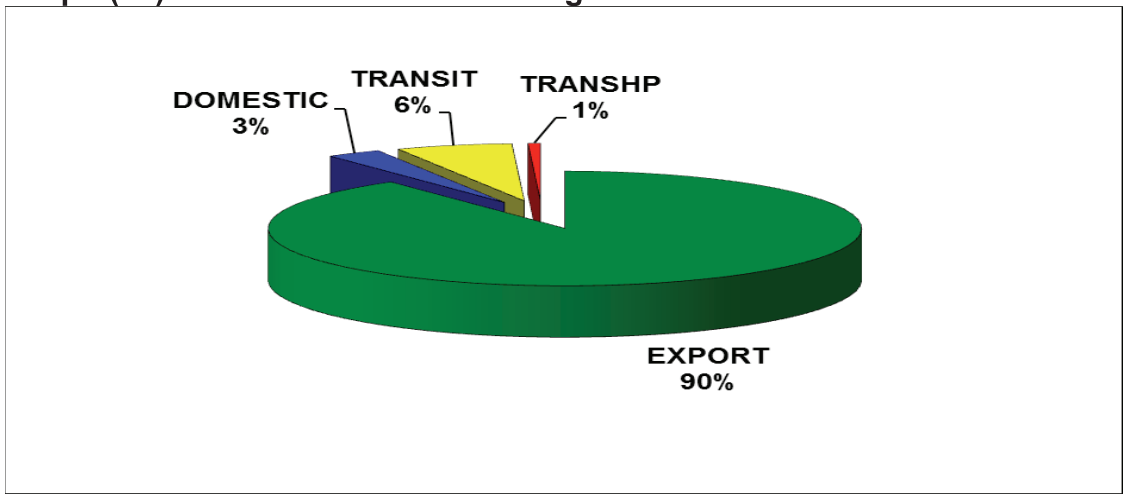
**Table (58): Handling Figures of Mersin International Port (2011)**

| MERSIN INTERNATIONAL PORT | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| TYPE OF CARGO | LOADING (Tonnes) | | | | UNLOADING (Tonnes) | | | | TOTAL |
| | EXPORT | DOMESTIC | TRANSIT | TRANSHP | IMPORT | DOMESTIC | TRANSIT | TRANSHP | |
| CEMENT | 994.466 | 53.114 | 37.781 | | 2.777 | | 2.443 | | 1.090.581 |
| CEREALS | 91.466 | 34.712 | 13.911 | 96 | 1.189.230 | 11.974 | 9.823 | 98 | 1.351.310 |
| CHEMICALS | 578.436 | 14.035 | 4.251 | 10.359 | 1.594.074 | 34.498 | 25.218 | 10.188 | 2.271.059 |
| CITRUS | 32.726 | | 1.808 | | 52.285 | | 354 | | 87.173 |
| CNTR | | | 296.756 | | | | 275.722 | | 572.478 |
| CONST. MACHINERY | 10.814 | | 104 | 34 | 13.419 | | 7.025 | 94 | 31.490 |
| COTTON | 50.311 | | 3.064 | 1.079 | 402.279 | 1.101 | 463 | 2.072 | 460.369 |
| EMPTY MAFI | | | 9 | | | | 8 | | 17 |
| FERTILIZERS | 17.176 | 35.411 | 226 | 59 | 177.246 | 25.128 | 2.570 | 71 | 257.887 |
| FOOD STUFF | 1.040.850 | | 24.353 | 888 | 757.124 | 8.146 | 64.991 | 2.307 | 1.898.659 |
| FROZEN MEAT | 4.274 | | 433 | | 20.264 | | 109.604 | | 134.575 |
| FRUITS | 137.887 | | 4.928 | 327 | 82.538 | 40 | 400.262 | 212 | 626.194 |
| GENERAL CARGO | 1.734.143 | 2.310 | 155.754 | 43.988 | 1.683.844 | 108.830 | 286.434 | 36.277 | 4.051.580 |
| GLASS | 168.046 | 977 | 208 | 772 | 22.654 | | 251 | 135 | 193.043 |
| LEGUMES | 171.639 | | 2.884 | 244 | 514.600 | 184 | 9.387 | 137 | 699.075 |
| LIVESTOCK | | | | | 55.856 | | 1.730 | | 57.586 |
| MACHINERY | 28.773 | | 2.026 | 559 | 46.477 | 454 | 3.219 | 800 | 82.308 |
| MINERALS | 2.335.012 | 17.585 | 23.525 | 3.140 | 551.844 | 5.485 | 1.219 | 3.235 | 2.941.045 |
| PETR. PRODUCTS | 170.148 | 116.141 | 432 | 338 | 3.398.806 | 561.758 | 20.716 | 344 | 4.268.683 |
| RICE | 92.689 | | 2.312 | | 238.360 | | 12.530 | | 345.891 |
| SODIUM CARB. | 525.722 | 6.250 | 194 | 88 | 483 | | 47 | | 532.784 |
| SUGAR | 5.334 | | 3.348 | | 836 | | 1.097 | | 10.615 |
| TEXTILE | 234.928 | 117 | 8.300 | 767 | 577.369 | 813 | 26.657 | 1.782 | 850.733 |
| TIMBER | 2.949 | | 4.958 | 20 | 25.829 | 1.818 | 3.827 | | 39.401 |
| VEGETABLE OIL | 32.359 | | 646 | 74 | 620.680 | 12.566 | 3.539 | 276 | 670.140 |
| VEHICLES | 9.249 | | 3.413 | 270 | 27.319 | 34 | 56.751 | 567 | 97.603 |
| TOTAL | 8.469.397 | 280.652 | 595.624 | 63.102 | 12.056.193 | 772.829 | 1.325.887 | 58.595 | 23.622.279 |

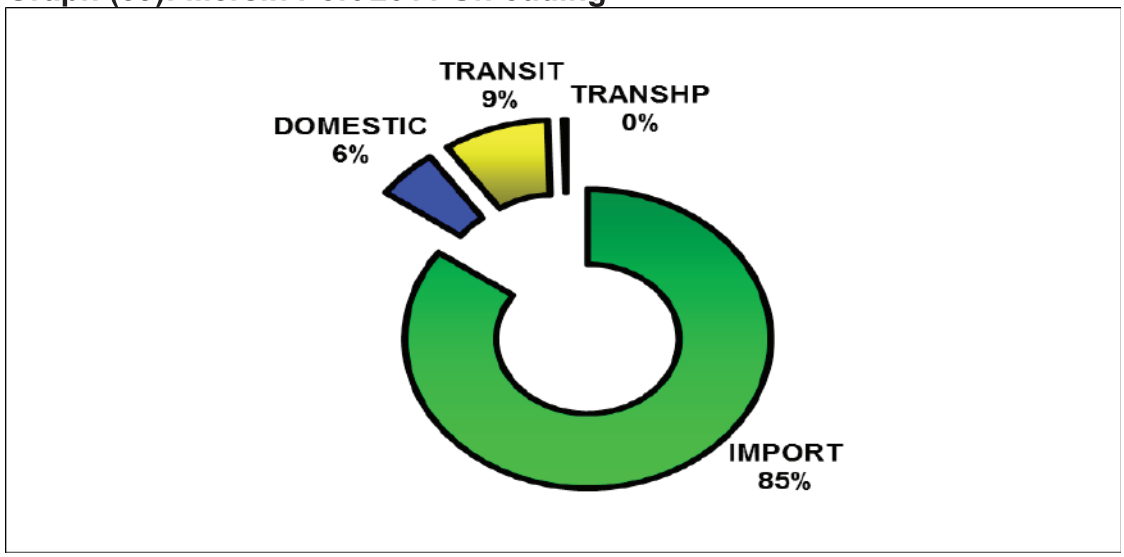
Table (59): Container Handling Figures of MIP (2011)

| CONTAINER TYPES | | LOADED | DISCH. | TOTAL |
|---|---|---|---|---|
| | | Num. | Num. | Num. |
| 20' CNTR | FULL | 175.720 | 99.379 | 275.099 |
| | EMPTY | 11.334 | 87.717 | 99.051 |
| 40' CNTR | FULL | 115.039 | 168.298 | 283.337 |
| | EMPTY | 68.136 | 22.382 | 90.518 |
| BOX | FULL | 290.759 | 267.677 | 558.436 |
| | EMPTY | 79.470 | 110.099 | 189.569 |
| TEU | FULL | 405.798 | 435.975 | 841.773 |
| | EMPTY | 147.606 | 132.481 | 280.087 |
| TOTAL | BOX | 370.229 | 377.776 | 748.005 |
| | TEU | 553.404 | 568.456 | 1.121.860 |

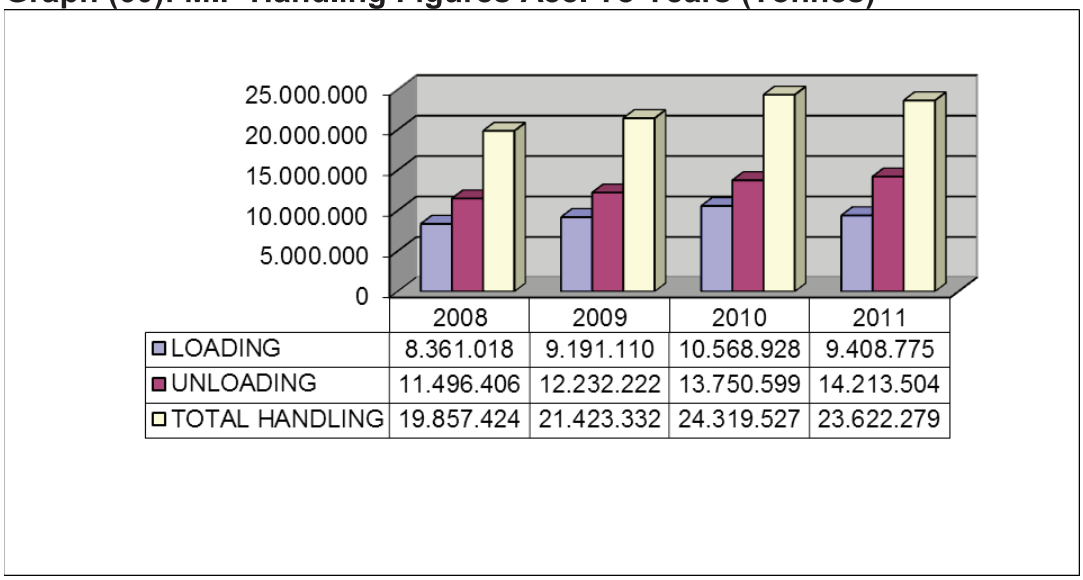
Graph (58): Mersin Port 2011 Loading




Graph (59): Mersin Port 2011 Unloading



**Graph (60): MIP Handling Figures Acc. To Years (Tonnes)**




| | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|
| LOADING | 8.361.018 | 9.191.110 | 10.568.928 | 9.408.775 |
| UNLOADING | 11.496.406 | 12.232.222 | 13.750.599 | 14.213.504 |
| TOTAL HANDLING | 19.857.424 | 21.423.332 | 24.319.527 | 23.622.279 |

***Source: MIP***

## Samsunport (Samsun)






Samsun port carries out sea transport with Georgia's ports of Batumi, Poti and Suchumi; Russia's ports of Sochi, Tuapse, Novorossiysk, Azov Sea ports of Azov, Taganrog, Jdanov, Yalta, Berdyansk, Genichesk; Crimea's ports of Feodosiya, Yalta, Todor, Sevastopol, Yevpatorskiy; Ukraine's ports of Nikolayev, Odesa, İlichevsk; Romania's port of Constanta and Bulgaria's port of Varna. Samsunport also have connections with Istanbul and all world ports.

Samsunport is the biggest port of Turkey in Black Sea region and also it has a large hinterland. Because of this feature, the said port is a popular place for cargoes which come from and will go to Anatolia. Samsunport has railway and road connections with Kastamonu, Ankara, Kirsehir, Kayseri, Nigde, Konya, Malatya, Sinop, Corum, Amasya, Ordu, Sivas, Erzincan, Yozgat, Tokat. Samsunport aims to achieve top quality and speedy service by renewing vehicle park, making the revision of the present vehicles, construction of new warehouses, silos and liquid tanks.

Storage and port services are provided within 350.000 sqm port area of 445.000 sqm . In Samsunport, there are steel cereal silos, warehouses and general cargo storage areas.

**Main Port**
Dock numbers 1-2-3-4-5 have a total length of 776 meters and a draft of 7,5 to 10 meters.
Dock number 9 has a length of 400 meters and a draft of 6 meters.
**Industry Dock**
Dock numbers 6-7 have a total length of 400 meters and a draft of 11 meters.
Dock number 8 is Rail ferry Ramp, suitable for 1520 mm rail cars.

1183 vessels called Samsun Port in 2011. Handling Figures of Samsun Port according to cargo groups are as below;

Handling Figures of Çelebi Bandırma Port

| Year | Dry Bulk (Tons) | Liquid Bulk (Tons) | General Cargo (Tons) | Container (Tons) | Total |
|---|---|---|---|---|---|
| 2011 | 1.064.298 | 14.848 | 1.354.972 | 82.212 | 2.516.330 |
| 2010 | 844.993 | 32.008 | 1.038.791 | 4.015 | 1.920.807 |

***Source: Samsunport***

**Çelebi Bandırma Port**



The port has connections to Istanbul, Turkey's business and industrial center, to the Southern Marmara and Aegean Region and has a strategic location at the south coast of Marmara. It offers bulk load, ro-ro and mixed load handling services. Also in addition to having the longest pier in the region it is one of the biggest bulk load ports of Turkey. When the ro-ro services commenced in 2004, Port of Bandırma became an important stop for the shipment of truck loads from the Marmara region to inland regions.

Çelebi, thanks to the railway and highway connections and wide warehouses of Port of Bandırma, is considered the port that can provide the greatest benefit to the Southern Marmara, Central Anatolia and the Aegean Sea Regions. Çelebi will start a reconstruction process for the port so that it can serve this wide hinterland with a capacity of 10 mn tons of dry bulk and mixed load, and 300,000 TEU containers and 200,000 vehicles in the next 10 years.

The Port will also serve as an alternative to the increasing need of automotive industry in Bursa, which has an ever increasing export volume.
The improvements are estimated to bring the share of the port in international cargo handling from 2.7% in 2009 to 5,2% in 2020. Port of Bandırma will not only turn into one of the logistics centers in the region, but also contribute to the economical and social development of the region with the creation of employment opportunities. Çelebi, aims to invest 50 million USD in the next 5 years in Port of Bandırma.

Handling Figures of Çelebi Bandırma Port

| Year | General Cargo (Tons) | Bulk (Tons) | Liquid (Tons) | Container (TEU) | Ro-Ro (Pcs) | Passenger (Pcs) |
|---|---|---|---|---|---|---|
| 2011 | 345.082 | 3.214.328 | 190.912 | 2.072 | 198.366 | 967.115 |
| 2010 * | 145.631 | 2.060.021 | 67.170 | 0 | 129.044 | No Data |

** 2010 Values Are Since 18.05.2010.*

***Source: Çelebi Bandırma Port***

## Private Ports' List and Geographical Distribution of Main Ports In Turkey

| PRIVATE PORTS ACCORDING TO REGION |
|---|
| **ANTALYA DISTRICT** |
| 1. ALİDAŞ ALANYA LİMANI<br>2. ANTALYA LİMANI SERBEST BÖLGE RIHTIMI<br>3. ÇEKİSAN ŞAMANDIRASI<br>4. MOİL ŞAMANDIRA PLATFORMU<br>5. ORTADOĞU ANTALYA LİMAN İŞLETMELERİ A.Ş. (PORT AKDENİZ)<br>6. POAŞ ANTALYA ŞAMANDIRA TERMİNALİ |
| **ÇANAKKALE DISTRICT** |
| 1. AKÇANSA ÇANAKKALE LİMANI<br>2. BAGFAŞ İSKELESİ<br>3. PORT OF BANDIRMA<br>4. BORUSAN LİMANI<br>5. BP GEMLİK İSKELESİ<br>6. GEMLİK GÜBRE LİMANI<br>7. GEMPORT<br>8. RODA LİMAN DEPOLAMA VE LOJİSTİK İŞLETMELERİ A.Ş.<br>9. İÇDAŞ İSKELESİ<br>10. DOLAMİT MADENCİLİK RIHTIMI<br>11. ÖZGÜMÜŞ MADENCİLİK RIHTIMI |
| **İSTANBUL DISTRICT** |
| 1. ASYAPORT<br>2. AUTOPORT LİMAN İŞLETMELERİ A.Ş.<br>3. AKÇANSA AMBARLI LİMANI<br>4. AMBARLI DEPOLAMA TESİSLERİ<br>5. ANADOLU ÇİMENTO TESİSLERİ<br>6. SET ÇİMENTO SANAYİ VE TİCARET A.Ş.<br>7. AYGAZ LPG DEPOLAMA VE DOLUM TESİSLERİ<br>8. ÇEKİSAN ÇEKMECE DEPOLAMA<br>9. KUMPORT LİMANI<br>10. MARDAŞ<br>11. MARPORT |

**12. PETROL OFİSİ HARAMİDERE TESİSLERİ**
**13. TOTAL HARAMİDERE İSKELESİ**
**14. ANADOLU YAKASI KUMCULARI İSKELELERİ**
**15. MOBIL OIL SERVİBURNU İSKELESİ**
**16. PETROL OFİSİ ÇUBUKLU TESİSLERİ**
**17. ZEYPORT**
**18. AKÇANSA YALOVA ÇİMENTO TERMİNALİ İSKELESİ**
**19. AKSA AKRİLİK KİMYA SANAYİ A.Ş.**
**20. AKTAŞ TERMİNALİ**
**21. ALEMDAR DİLİSKELESİ**
**22. ALTINTEL İSKELESİ**
**23. AYGAZ YARIMCA DOLUM TESİSİ**
**24. ÇOLAKOĞLU METALURJİ TESİSLERİ**
**25. DİLER LİMAN TESİSLERİ**
**26. EVYAP DENİZ İŞLETMECİLİĞİ LOJİSTİK VE İNŞAAT A.Ş.**
**27. FORD OTOSAN YENİKÖY İSKELESİ**
**28. GÜBRETAŞ TESİSLERİ**
**29. HABAŞ TERMİNALİ**
**30. İGSAŞ İSTANBUL GÜBRE SANAYİ A.Ş.**
**31. EFESAN PORT**
**32. KIZILKAYA LİMANI**
**33. KORUMA KLOR ALKALİ SAN. VE TİC. A.Ş.**
**34. KROMAN ÇELİK LİMAN TESİSLERİ**
**35. LAFARGE ASLAN ÇİMENTO İSKELESİ**
**36. LİMAŞ İZMİT TERMİNALİ**
**37. MARMARA TRANSPORT İSKELESİ**
**38. MİLANGAZ ŞAMANDIRA TESİSLERİ**
**39. NUH ÇİMENTO SAN. A.Ş. (NUHPORT)**
**40. OPAY PLATFORM İSKELESİ**
**41. PETLINE PLATFORMU**
**42. PETROL OFİSİ DERİNCE İSKELESİ**
**43. POLİPORT**
**44. SEDEF KONTEYNER TERMİNALİ VE LİMAN İŞLETMELERİ**
**45. SHELL DERİNCE TESİSLERİ**
**46. SOLVENTAŞ**
**47. TOTAL GEBZE TERMİNALİ**
**48. TURKUAZ İSKELESİ**
**49. TÜPRAŞ İZMİT RAFİNERİ TESİSLERİ**
**50. TÜPRAŞ KÖRFEZ SIVI YÜK İSKELESİ**
**51. YALOVA ELYAF İSKELESİ**
**52. YARIMCA ROTA LİMANI**
**53. DP WORLD YARIMCA LİMANI**
**54. ERDEM EREĞLİ ÇİMENTO ÖZEL LİMANI**
**55. ERDEMİR LİMANI**
**56. EREN HOLDİNG LİMANI**
**57. BÜTANGAZ TERMİNALİ**
**58. OPET MARMARA TERMİNALİ İSKELE VE PLATFORMU**
**59. AKPORT**
**60. MARTAŞ MARMARA EREĞLİSİ LİMAN TESİSLERİ**
**61. ÇAYIROVA CAM SANAYİ İSKELESİ**
**62. GİSAŞ TUZLA İSKELESİ**
**63. U.N. RO-RO PENDİK LİMANI**
**64. YILPORT**

**İZMİR DISTRICT**

1. AKDENİZ KİMYA NEMPORT LİMANI
2. EGE ÇELİK LİMANI
3. EGE GÜBRE LİMANI
4. EGE GAZ LNG TERMİNALİ
5. HABAŞ İSKELESİ
6. BATIÇİM A.Ş. BATI LİMAN TESİSLERİ
7. İDÇ LİMANI
8. PETROL OFİSİ ALİAĞA TESİSLERİ
9. TOTAL OIL İSKELESİ
10. TÜPRAŞ LİMANI
11. PETKİM LİMANI
12. BODRUM CRUISE PORT
13. GÜLLÜK GEMİ YANAŞMA İSKELESİ
14. ÇEŞME LİMANI
15. DİKİLİ İSKELESİ
16. MOPAK İSKELESİ
17. KUŞADASI YOLCU LİMANI
18. MARMARİS LİMANI

**MERSİN DISTRICT**

1. TOROS CEYHAN TERMİNALİ
2. ADVANSA SASA POLYESTER TESİSLERİ
3. ÇEKİSAN ŞAMANDIRASI
4. GÜBRETAŞ SARISEKİ İSKELESİ
5. İSDEMİR LİMANI
6. DELTA PETROL LİMANI
7. ORHAN EKİNCİ İSKELESİ
8. YAZICI İSKELESİ
9. ATAŞ TERMİNALİ
10. MERSİN LİMANI
11. MMK ATAKAŞ DÖRTYOL LİMAN İŞLETMESİ
12. MESBAŞ RIHTIMI

**SAMSUN DISTRICT**

1. SAMSUNPORT
2. TOROS TARIM SANAYİİ SAMSUN LİMAN İŞLETMESİ
3. SÜRSAN ŞAMANDIRASI
4. ORDU LİMANI
5. AYGAZ ŞAMANDIRALARI
6. PETROL OFİSİ ŞAMANDIRALARI
7. TOTAL OIL ŞAMANDIRASI
8. YILDIZ ENTEGRE AĞAÇ SAN. ŞAMANDIRASI
9. SİNOP LİMANI

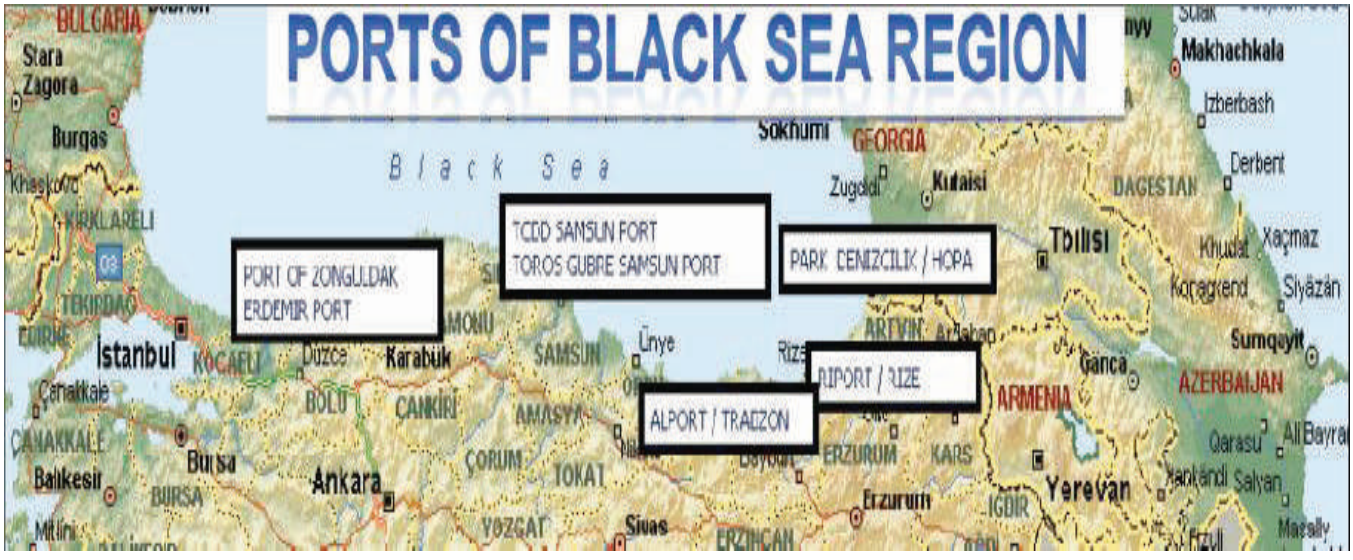
**TRABZON DISTRICT**

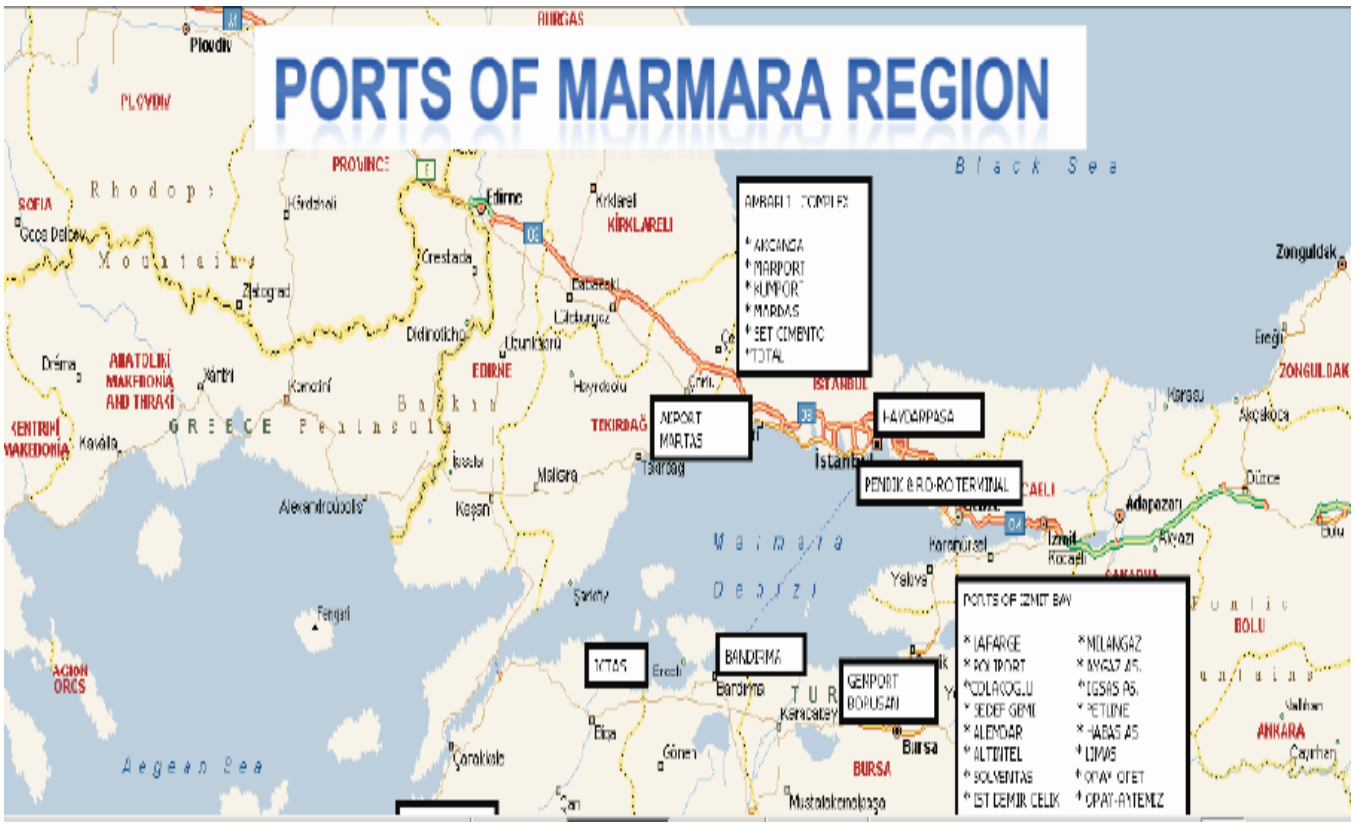
1. GİRESUN LİMANI
2. PARK DENİZCİLİK HOPA LİMAN İŞLETMELERİ A.Ş.
3. RİPORT
4. ÜNYE ÇİMENTO TESİSİ LİMANI
5. POAŞ ŞAMANDIRA TESİSLERİ
6. TRABZON LİMANI

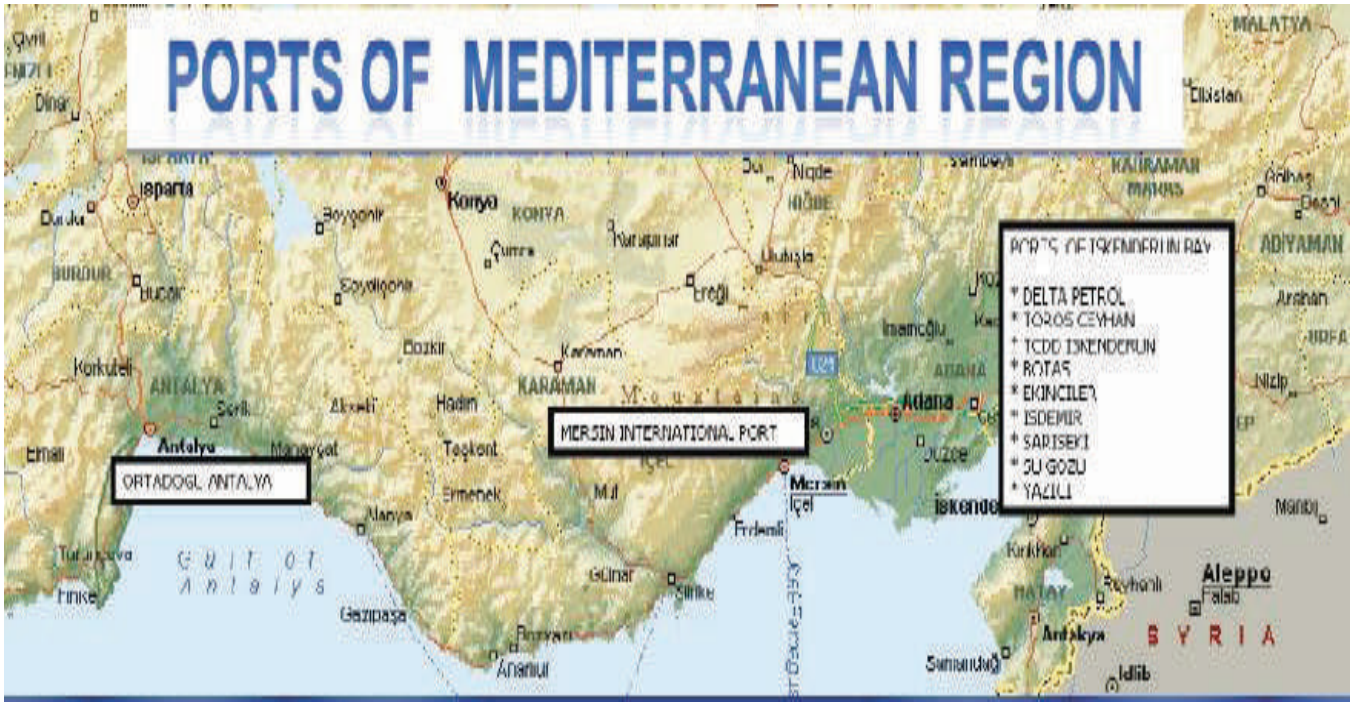
## Graph (61): Geographical Distribution of Main Ports in Turkey




*Source: TURKLIM*







PORTS OF MEDITERRANEAN REGION
Mediterranean Sea
Gulf of Antalya
Isparta
Konya
KONYA
KARAMAN
Mountains
Antalya
ANTALYA
Korkuteli
Burdur
Beyşehir
Seydişehir
Akseki
Hadim
Taşkent
Ermenek
Mut
Silifke
Gülnar
Anamur
Gazipaşa
Alanya
Manavgat
Finike
Demre
Elmalı
Ereğli
Karaman
Çumra
Karapınar
Ilgın
Niğde
NİĞDE
Kayseri
Develi
Yahyalı
Tarsus
Adana
ADANA
Mersin
İçel
Erdemli
Anamur
Gülnar
Silifke
Aydıncık
Bozyazı
Çamlıyayla
Mut
Ermenek
Hadim
Taşkent
Akseki
Manavgat
Serik
Belek
Kemer
Finike
Demre
Elmalı
Korkuteli
Burdur
Bucak
Isparta
Dinar
Afyon
Uşak
Eskişehir
Kütahya
Bilecik
Bozüyük
Osmaneli
Lefke
Yenişehir
Osmaniye
Kadirli
Kahramanmaraş
Elbistan
Malatya
Adıyaman
Besni
Gölbaşı
Adıyaman
Arsuzlu
Samandağ
Antakya
Hatay
Reyhanlı
Aleppo
Idlib
SYRIA
İskenderun
Dörtyol
Erzin
Payas
Toprakkale
Osmaniye
Kadirli
Sumbas
Ceyhan
Misis
Yumurtalık
Karataş
Aladağ
Pozantı
Ulukışla
Bor
Çiftehan
Altunhisar
Niğde
Kayseri
Develi
Yahyalı
Tomarza
Sarız
Pınarbaşı
Kangal
Gemerek
Zara
Suşehri
Gürün
Hafik
Divriği
Kemaliye
Refahiye
Tercan
Erzincan
Çayırlı
Üzümlü
Kemah
Kelkit
Şiran
Gümüşhane
Torul
Kürtün
Çaykara
Maçka
Akçaabat
Trabzon
Araklı
Of
Sürmene
Arsin
Yomra
Vakfıkebir
Çarşıbaşı
Tonya
Hayrat
Köprübaşı
Akçakoca
Düzce
Bolu
Gerede
Çerkeş
Ilgaz
Çankırı
Çandır
Yozgat
Sorgun
Akdağmadeni
Boğazlıyan
Sarıkaya
Yerköy
Çekerek
Şefaatli
Kırıkkale
Delice
Keskin
Bahşılı
Kırıkhan
Reyhanlı
Hassa
Antakya
Samandağ
Arsuz
Payas
Erzin
Dörtyol
İskenderun
Belen


PORTS OF AEGAN REGION
Aegean Sea
VÓREION AIGAION
Kutahya
ESKIŞEHIR
UTAHYA
ALIAGA PORT COMPLEX
* BATICIM
* EGE GUBRE
* PETKIM
* HABAS
* PETROL OFISI
* TOTAL
* TUBRAS
* EGE GAZ
* IDC
Uşak
UŞAK
AFYON
CEŞME
IZMIR
Turgutlu
TURKEY
Eşme
Alaşehir
Ödemiş
Tire
Kuşadası
Samos
Aydın
AYDIN
Denizli
DENIZLI
ISPARTA
Burdur
Çine
BURDUR
Milas
Yatağan
GULLUK
Muğla
Bodrum
MUĞLA
Kos
Marmaris
Ortaca
Kemer
ANTALYA
Elmalı
Fethiye
Mediterranean Sea
Aegean Islands
Ermoúpolis
Náxos
GREECE
Cyclades
Dodecanese


PORTS OF IZMIT BAY


•LAFARGE ASLAN ÇİMENTO A.Ş.
•www.lafarge.com.tr
• ROTA Limanı
• www.rotadenizcilik.com.tr
•EVYAP Deniz İşletmeciliği
•www.evyap.com.tr
•ÇOLAKOĞLU METALURJİ A.Ş.
•www.colakoglu.com.tr
• SOLVENTAŞ TEKNİK
• www.solventas.com.tr
•TCDD DERİNCE LİMAN İŞLETMESİ
•www.tcdd.gov.tr
•ALEMDAR DİLİSKELESİ LİMAN
•www.alemdar.com.tr
• İSTANBUL DEMİR ÇELİK
• www.kizilkayaport.com
•FORD OTOSAN
•www.uecc.com
•POLİPORT KİMYA
•www.poliport.com
• TOTAL GEBZE
• www.total.com.
•LİMAŞ LİMAN
•www.limas.net
•SEDEF GEMİ ENDÜSTRİSİ
•www.sedefport.com
• KROMAN ÇELİK
• www.sedefport.com
•HABAŞ A.Ş. LPG Platformu
•www.habas.com.tr
•ALTINTEL MELAMİN
•www.altinteltankterminal.com
• DİLER Demir Çelik End
• www.dilerhld.com
•TÜPRAŞ KÖRFEZ PETROKİMYA
•www.tupras.com.tr


TURKISH STRAITS
EMES

## CHAPTER V

### THE TURKISH STRAITS AND MARITIME TRAFFIC SYSTEMS

The region consisting of the Turkish Straits, called İstanbul and Çanakkale Straits and the Sea of Marmara, is one of the regions that has the highest concentration of maritime traffic in the World.

Turkish Straits consist of the Istanbul Strait 17 nm in length, 110 nm the vessels navigating area in Marmara Sea and Çanakkale Strait in length 37 nm. Total length of the Turkish Straits is 164 nm and it is opened to international maritime vessel traffic under the Turkish governmental control.

This 164 nm long seaway, starting from the north entrance of Istanbul Strait and ending at the south exit of Çanakkale Strait, is a region that should be given with high importance both from geomorphological and hydrographical aspects, especially for having 12 sharp turning points with 45º in front of Istanbul Strait-Kandilli and 80º in front of Yeniköy and with complex currents which reach to a relative speed of 4-5 knots.

The Strait of Istanbul is unique as it runs through the city of İstanbul with more than 15 million inhabitants. The shoreline of Istanbul is densely populated. Vessels approach frequently as close as 50 meters to these inhabited areas. Excluding the vessel traffic, the local traffic such as leisure crafts and fishing vessels, daily domestic vessel movement alone in the Strait of Istanbul is more than 2500. More than 2.5 million people are daily in a movement at sea crossing from one side to another in Istanbul. Istanbul is a city with 3000 years of history. It is declared as a "world heritage city" by UNESCO.

Beside its geopolitic and strategic importance, the Turkish Straits is highly congested with international maritime traffic due to being only waterway between the Black Sea and the Mediterranean Sea without any alternative.

The number of vessels that passed through the Turkish Straits between the years 1997-2011 are shown in Table below.

**TABLE (60) : Ships Passing Through the Turkish Straits**

| YEARS | ISTANBUL | ÇANAKKALE |
|---|---|---|
| 1998 | 49.304 | 38.777 |
| 1999 | 47.906 | 40.582 |
| 2000 | 48.079 | 41.561 |
| 2001 | 42.637 | 39.249 |
| 2002 | 47.283 | 42.669 |
| 2003 | 46.939 | 42.648 |
| 2004 | 52.452 | 48.421 |
| 2005 | 54.794 | 49.077 |
| 2006 | 54.880 | 48.915 |
| 2007 | 56.506 | 49.913 |
| 2008 | 54.396 | 48.978 |
| 2009 | 51.422 | 49.453 |
| 2010 | 50.871 | 46.686 |
| 2011 | 49.798 | 45.397 |

In the year 2011, 49.798 ships in total have passed through Istanbul Strait with a monthly average of 4.149 ships, 45.397 ships in total have passed through Çanakkale Strait with a monthly average of 3.783 ships. Daily averages are 138 ships for İstanbul Strait and 126 ships for Çanakkale Strait.

In the year 2011, 138.496.245 tons of dangerous cargoes transited through İstanbul Strait. 156.327.711 tons of dangerous cargoes transited through Çanakkale Strait. In addition to these figures, approximately more than two million people pass across the İstanbul Strait daily by small passenger vessels. This value is four times higher than Suez Channel and three times than Panama Channel. This density of traffic between Asia and Europe increases by the population of İstanbul which has reached nearly 15 million.

The statistics of ships passing through İstanbul and Çanakkale Straits, according to lenght, piloting and on country basis are shown in the following Tables.

**TABLE (61) Statistics of Ships Passing through İstanbul Strait**

| YEARS | TOTAL SHIPS | WITH PILOT | SP1 | TRANSIT | SMALLER THAN 200M | BIGGER THAN 200M | SMALLER THAN500GT | BIGGER THAN 500GT |
|---|---|---|---|---|---|---|---|---|
| 1999 | 47906 | 18424 | 30619 | 26323 | 45738 | 2168 | 3552 | 44354 |
| 2000 | 48079 | 19209 | 38564 | 26858 | 45776 | 2203 | 3345 | 44734 |
| 2001 | 42637 | 17767 | 38940 | 26113 | 40184 | 2453 | 2155 | 40482 |
| 2002 | 47283 | 19905 | 44726 | 29398 | 44170 | 3113 | 1933 | 45350 |
| 2003 | 46939 | 21175 | 45340 | 28951 | 44016 | 2923 | 1782 | 45157 |
| 2004 | 54564 | 22318 | 54564 | 34256 | 51512 | 3052 | 2107 | 52457 |
| 2005 | 54794 | 24494 | 54686 | 34111 | 51291 | 3503 | 1610 | 53184 |
| 2006 | 54880 | 26589 | 53324 | 31880 | 51227 | 3653 | 2176 | 52704 |
| 2007 | 56606 | 26685 | 55132 | 31826 | 52953 | 3653 | 2138 | 54468 |
| 2008 | 54396 | 27001 | 53232 | 31762 | 50485 | 3911 | 1800 | 52536 |
| 2009 | 51422 | 25073 | 50712 | 32297 | 47551 | 3871 | 1128 | 50294 |
| 2010 | 50871 | 26035 | 50020 | 28668 | 47248 | 3623 | 1377 | 49494 |
| 2011 | 49798 | 26011 | 49179 | 27938 | 45998 | 3800 | 1046 | 48752 |

**TABLE (62) Statistics of Ships Passing through Çanakkale Strait**

| YEARS | TOTAL SHIPS | WITH PILOT | SP1 | TRANSIT | SMALLER THAN 200 M | BIGGER THAN 200M | SMALLER THAN 500 GT | BIGGER THAN 500 GT |
|---|---|---|---|---|---|---|---|---|
| 1999 | 40582 | 10002 | 24553 | 26900 | 38014 | 2568 | 1492 | 39090 |
| 2000 | 41561 | 11130 | 33861 | 27033 | 38864 | 2697 | 1398 | 40163 |
| 2001 | 39249 | 10704 | 37525 | 26452 | 36289 | 2960 | 936 | 38313 |
| 2002 | 42669 | 12164 | 42077 | 29900 | 39004 | 3665 | 689 | 41980 |
| 2003 | 42648 | 13020 | 42648 | 29114 | 38925 | 3723 | 677 | 41971 |
| 2004 | 48421 | 14404 | 48421 | 36310 | 44504 | 3917 | 1327 | 47094 |
| 2005 | 49077 | 15661 | 48979 | 34784 | 44585 | 4492 | 1211 | 47866 |
| 2006 | 48915 | 16871 | 48264 | 32061 | 44070 | 4845 | 1404 | 47511 |
| 2007 | 49913 | 16885 | 48802 | 31981 | 44968 | 4945 | 1873 | 48040 |
| 2008 | 48978 | 18334 | 48565 | 31981 | 43755 | 5223 | 844 | 48134 |
| 2009 | 49453 | 18588 | 49210 | 32559 | 44277 | 5176 | 615 | 48838 |
| 2010 | 46686 | 18678 | 46469 | 28768 | 41588 | 5098 | 598 | 46088 |
| 2011 | 45379 | 18920 | 45196 | 27983 | 39885 | 5494 | 572 | 44807 |

The statistics of ships passing through İstanbul and Çanakkale Straits with dangerous cargoes are shown in the following Tables.

**TABLE( 63): The Ships Carried Dangerous Cargoes – İstanbul Strait**

| Years | Total passage | Number of Tankers | % | Dangerous Cargoes (Tons) |
|---|---|---|---|---|
| 1997 | 50942 | 4303 | 12 | 63.017.194 |
| 1998 | 49304 | 5142 | 13 | 68.573.523 |
| 1999 | 47906 | 5504 | 12 | 81.515.453 |
| 2000 | 48079 | 6093 | 13 | 91.045.040 |
| 2001 | 42637 | 6516 | 15 | 101.000.000 |
| 2002 | 47283 | 7427 | 16 | 122.953.338 |
| **2003** | **46939** | **8097** | **17** | **134.603.741** |
| **2004** | **54564** | **9399** | **17** | **143.448.164** |
| **2005** | **54794** | **10027** | **18** | **143.567.196** |
| **2006** | **54880** | **10153** | **19** | **143.452.401** |
| **2007** | **56606** | **10054** | **18** | **143.939.432** |
| **2008** | **54239** | **9303** | **17** | **140.357.231** |
| **2009** | **51422** | **9299** | **18** | **144.656.744** |
| **2010** | **50871** | **9273** | **18** | **146.748.375** |
| **2011** | **49798** | **9113** | **18** | **138.496.245** |

**TABLE (64):The Ships Carried Dangerous Cargoes – Çanakkale Strait**

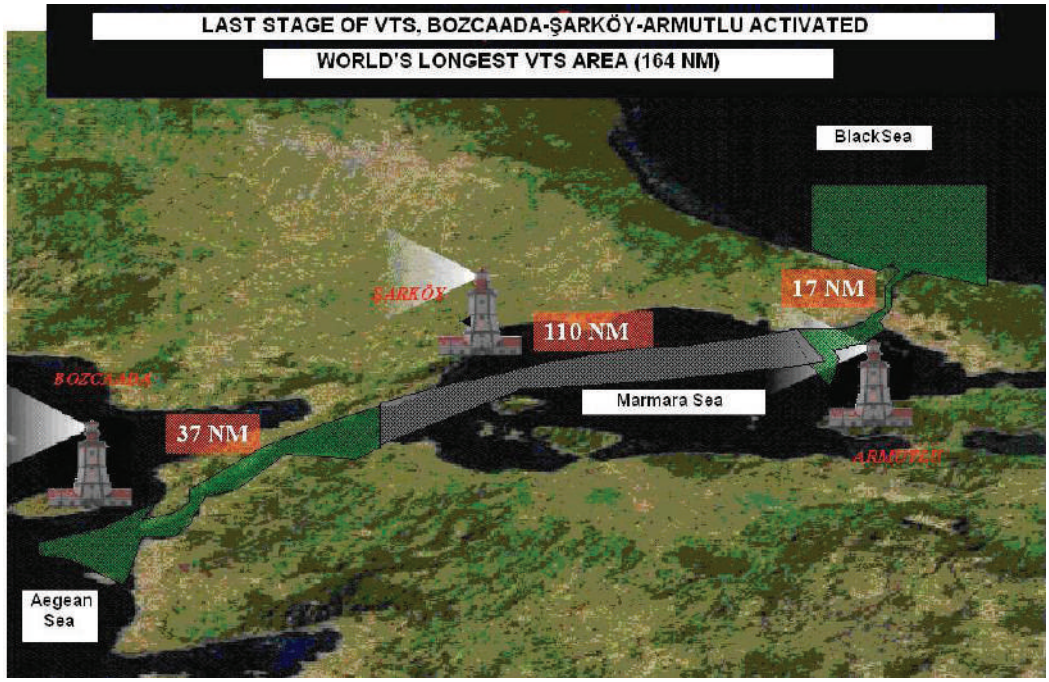
| Years | Total passage | Number of Tankers | % | Dangerous Cargoes (Tons) |
|---|---|---|---|---|
| 1997 | 36543 | 6043 | 17 | 80.485.711 |
| 1998 | 38777 | 6546 | 17 | 81.974.831 |
| 1999 | 40582 | 7266 | 18 | 95.932.049 |
| 2000 | 41561 | 7529 | 18 | 102.570.322 |
| 2001 | 39249 | 7064 | 18 | 109.000.000 |
| 2002 | 42669 | 7627 | 18 | 130.866.598 |
| **2003** | **42648** | **8114** | **19** | **145.154.920** |
| **2004** | **48421** | **9016** | **19** | **139.203.656** |
| **2005** | **49077** | **8813** | **18** | **148.951.376** |
| **2006** | **48915** | **9567** | **20** | **152.725.701** |
| **2007** | **49913** | **9271** | **18** | **149.320.062** |
| **2008** | **48978** | **8758** | **18** | **149.052.174** |
| **2009** | **49453** | **9567** | **19** | **152.105.494** |
| **2010** | **46686** | **9250** | **20** | **156.928.857** |
| **2011** | **45379** | **8828** | **19** | **156.327.711+** |

## Activities Made for Controlling the Maritime Traffic in Turkey

### Turkish Straits Vessel Traffic Services - Additional Traffic Observation Stations

Turkish Straits Vessel Traffic Services (VTS) was put into service on 30 December 2003 with the purpose of lessening the risks of maritime accidents which may happen and directing the maritime traffic in the area with continuous observations made and increasing the safety of life, properties and the environment in the Turkish Straits and in the Sea of Marmara. The construction and infrastructure works of three Traffic Monitoring Stations (TMS), Armutlu TMS, Bozcaada TMS and Şarköy TMS. and the mounting of the electrical - electronical systems and equipments on the TMS Towers were completed and the system was put into service on 2 July 2008.

The Sea of Marmara has been integrated into the main system as of 2009 and the whole of the area within the Traffic Separation System in the Sea of Marmara and also an area of 20 sea miles West and South of Bozcaada have been taken into coverage. As of 2010 it is possible to make a continuous detecting of ships from the Aegean Sea to the Black Sea.




### Vessel Trafic Management System (VTMS) Project

Within the scope of the Project for Vessel Traffic Management System (VTMS) the installation of which is continued by the related Ministery, it is planned that Regional Vessel Traffic Services (VTS) be built in order to increase the navigation safety in İzmit, İzmir, Iskenderun and Mersin regions in which vessel traffic is intense

and risky, most of the dangerous cargoes are handled and passenger transportation takes place and a single Vessel Traffic Management Center (VTMC) in which a single territory image is created be established within the Administration in Ankara. Through Regional VTS Systems, it is aimed to increase the sea traffic safety and efficiency and to monitor, arrange, organize and manage the vessel traffic movements in interaction with vessels in a view to protecting the sea environment as well as to provide one or more of the services of information, navigation assistance and traffic organization in some or all of the regional VTS areas. Regional VTS Systems consist of 24 Traffic Surveillance Posts and 3 Vessel Traffic Services Centers.

Via the Vessel Traffic Management Center (VTMC) to be established in Ankara, the following shall be ensured

- Creating a single territory image by combining and integrating the sea images created in Regional VTS Centers (Istanbul VTSC, Canakkale VTSC, Izmit VTSC, Izmir VTSC, Mersin VTSC) with the other systems (such as LRIT, OTS,e-denizcilik software etc.)
- Monitoring and following up the movements of vessels and cargoes (all movements and operations as from their first notification of the before arrival to their leave from the port area) in all ports throughout the country in order to ensure them to be used in a safer and more efficient way.
- Oil pollution follow-up in Izmit Bay, which has selected as pilot area
- Crisis management in emergencies (SAR)
- Ensuring that all ports and other users included in the system can, as a part of the system, receive and enter information from/in the system
- Entire or a part of the territory image which can be monitored and managed by high-level officers in their place of duty.

All organizations such as Port Authorities, VTS', Agencies, Port Facilities, Pilotage Organizations, Tugboating Organizations can send and receive data to/from VTMC and carry out operations via VTMC.

In addition, such institutions as Navy, Coast Guard Command, General Directorate of Security Affairs, the Undersecretariat of Customs etc. can also send and receive data to/from VTMC and carry out operations via VTMC. The Factory Acceptance Tests for the electrical and electronic equipment and software of the system has been completed, the devices to be used in the system have been shipped in the country:

- The works in İzmit VTS Region (VTSC and TGI) have been completed and provisionally accepted.
- Iskenderun-Mersin VTS: TGI construction works have been completed while VTSC construction works are under progress.
- Izmir VTS: TGI and VTSC construction works are under progress.

### Automatic Identification System (AIS)

The Headquarters of Automatic Identification System (AIS) was inaugurated on 9 July 2007 with the aim of increasing the safety of navigation, life, properties and environment and also, to lessen the occurrence risk of the maritime accidents and to control the maritime traffic continuously.

By the AIS Base Stations established throughout the shores of Turkey, the vessels can be investigated automatically, therefore, it is possible to control effectively the ships navigating in the seas surrounding our country.

The VHF Channels to be used in the AIS System were determined by IMO as the Channels 87 and 88, these Channels which had doublex characteristics previously have been changed to simplex; their frequencies being 161,975 MHz and 162,025 MHz.

- ✓ OTS Base Stations (Stations based at the coast, through which data of the vessels are automatically received)
- ✓ OTS Main Center (Center where data received from all OTS Base Stations are collected, viewed and processed)
- ✓ Onboard OTS Terminals (Terminals with which the vessels will be equipped based on a certain operation calendar)
- ✓ OTS User Centers (Agencies and bodies receiving OTS data through linking with OTS Main Center)

OTS Main Center is the unit where data received from all coastal base stations are collected and transferred to relevant agencies and bodies such as Turkish Naval Forces, Turkish Coast Guard Command, Directorate General of Coastal Safety through a Network infrastructure. In such unit, all vessels within the coverage of OTS Base Stations and equipped with such terminals can be monitored close to real time (with 2 – 6 seconds delay) by means of the electronic map imaging system and the OTS software and digital maps operating on that system.

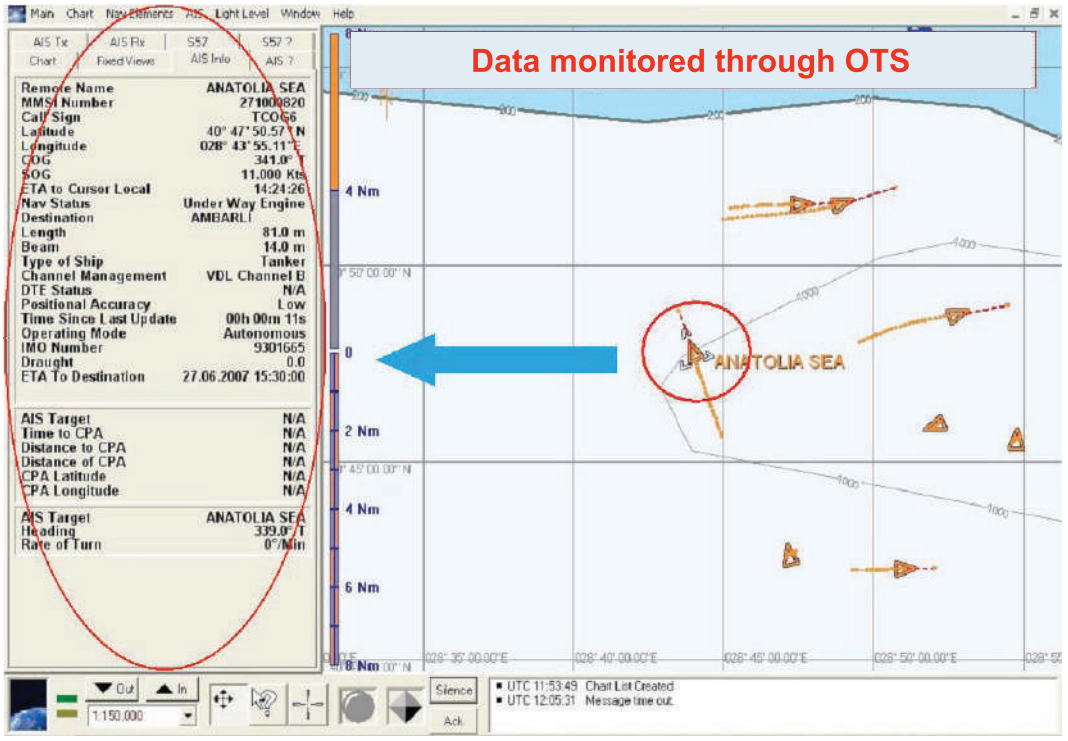
It is very important that the system infrastructure is installed on an elevated location in order to allow that the OTS Base Stations to be used between the vessels and the land have an effective coverage. Since such system operates on VHF band, it is essential that the antennas have optical sight of each other during communication between the vessels and the land. Unless the territorial OTS Base Stations are not at sufficient elevation, it is very difficult to achieve unproblematic communication particularly at indented coastal band.

The data that can be sent by the onboard OTS terminals to the coastal base and control stations, as well as those that can be transferred to relevant agencies and bodies through the coastal stations are summarized in the following headings and items.

**Data Monitored through OTS**

**Static Data**

MMSI number
IMO (International Maritime Organization) number
Name of vessel and call sign
Type of vessel
Length and width of vessel
Tonnage of vessel
Antenna position of onboard AIS terminal




**Dynamic Data**

Location of vessel
Time
Route to ground (real route)
Speed to ground
Relative route
Status (underway, anchored, etc.)
Rate of turn

**Navigational Data**

Draught of vessel
Cargo
Port of destination and ETA (estimated time of arrival at the port)
Other Data of Vessels that may be Required;
Starting port
Port of destination
Time of start of navigation
If anchored, anchoring location
Purpose of anchoring
Other necessary data

Transmission of text messages between the vessel and the coast is also possible owing to OTS. Thus, it is possible to send and receive official and private messages through the existing system infrastructure.

One of the most important issues regarding OTS is that in case of any emergency of the vessel (fire, conflict, grounding, accident, etc.), she can urgently

inform the situation to the coastal stations and that coastal stations can intervene at short notice because the vessel's location is known.

OTS has an open architecture regarding its coastal infrastructure; it is possible to transmit the collected data to the desired agencies and bodies and private firms, when necessary, within certain authorizations owing to Networks technology. Thanks to this feature, it is also possible to commercially utilize and make revenues through OTS.

In conclusion, OTS, the standards and activity calendar regarding installation on vessels of which was decided upon by IMO, of which Turkey is also a member, is a system designed to meet the needs of agencies and bodies in the naval sector of our country in technical terms.

OTS, which our country having coasts can use for interrogating the vessels navigating on surrounding seas and narrow waters such as straits and inland waters and for automatically receiving data on identifications, speeds, positions, etc. of such vessels, can also be effectively used by relevant agencies and bodies for state security. Real-time monitoring of unmilitary vessels in order to effectively and economically carry out particularly missions and operations such as naval search and rescue operations, combat with trafficking and prevention of marine pollution is considered as an indispensable necessity. Numerous objectives such as;

- ✓ Rendering our coasts more secure and safer for navigation,
- ✓ Being able to prevent maritime accidents and to contribute to urgent intervention to maritime accidents,
- ✓ Becoming more effective in Search and Rescue operations,
- ✓ Being capable of preventing trafficking and illegal migration,
- ✓ Being able to take fishing activities under control,

were achieved through OTS.

### OTS Class-B CS

It is also one of our most important objectives to make maximum use of all capabilities provided by OTS, which was established in order to promote safety of navigation and maritime security in our country. It becomes possible to monitor all vessels and marine vessels equipped with OTS device through this system. It is brought to the agenda during IMO meetings that vessels and marine vessels not subject to SOLAS should also be monitored; however, as IMO cannot impose compulsory rules for such vessels, the member states implement their own regulations. Arrangements were also made by the EU through directive no. 2244/2003 for satellite monitoring of fishing boats, and studies were initiated to ensure that fishing boats with a length of 15 meters and more are equipped with OTS devices, because satellite monitoring is very costly. International manufacturing and standardizing studies for OTS Class-B device, which has more limited features and is to be used by vessels out of SOLAS (Safety Of Life At Sea) scope, have been commenced along with those for OTS Class-A device used by vessels within the scope of SOLAS. Studies were initiated in Turkey in 2005 by our Telecommunications Authority in order to encourage the manufacture of OTS

Class-B device. Presently, three domestic firms have completed the manufacturing studies for OTS Class-B device incorporating additional national functions, and the communiqué regulating the types and sizes of vessels where OTS Class-B CS device is to be installed and the procedures and principles that should be fulfilled has entered into effect upon publication in the Official Gazette no. 26640 dated 11/09/2007.










## (Long Range Identification and Tracking – LRIT) System

Under the studies initiated at IMO upon maritime security becoming one of the most prioritized issues after the terrorist attacks in the USA on 11 September 2001 and AIS allowing tracking of vessels sailing within a certain range from the coast, IMO has started to establish a “Long Range Identification and Tracking System” (LRIT) as the necessity of tracking vessels at longer ranges (out of the coverage of AIS) was acknowledged and the terrorists started to target maritime transportation.

The intense studies carried out by the Maritime Safety Committee (MSC) of IMO for this system planned to track vessels at long distances through satellites were eventually finalized upon working on and completing the LRIT performance standards and functional requirements developed by COMSAR Sub-committee

during the 81st Period Meeting held in May, and the LRIT System was accepted. Thus, the following vessels navigating internationally can be tracked:

- ✓ Cruise liners including high-speed passenger boats
- ✓ 300 GT and higher capacity cargo vessels including high-speed boats
- ✓ Mobile offshore drilling units

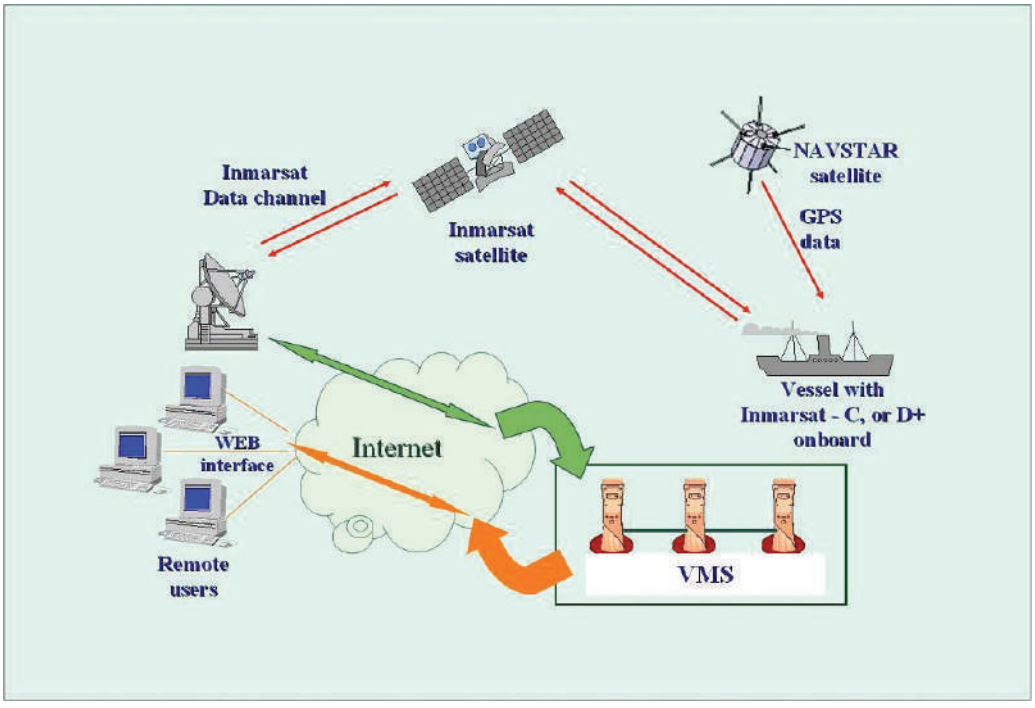
IMO member states will be able to receive long range identification and tracking information of the vessels with respect to security and other issues agreed by IMO. The responsibilities of countries as flag, port and coast states are defined.

Owing to LRIT, the countries can interrogate;

- ✓ Vessels flying their flag
- ✓ Vessels arriving at and leaving their ports
- ✓ Vessels passing from up to 1000 miles from their coasts
- ✓ Vessel/s aimed at search and rescue

within the framework of rules set by IMO.

LRIT System is presently planned to be activated using Inmarsat Satellites. The cost of requested LRIT information shall be fully borne by the requesting State Party; no cost shall be burdened to the vessels. The units of State Parties providing Search and Rescue Services shall be able to receive the LRIT information for Search and Rescue purposes free of charge.




**Operating Principle of LRIT**

Each Administration shall decide on choosing the LRIT Data Center where it shall provide the LRIT information of the vessels under its flag. Each administration shall inform the following data of the vessels under its flag, identified

to provide the LRIT information of to the LRIT Data Center it chooses, and shall keep such information up-to-date.

- ✓ Vessel name
- ✓ IMO number
- ✓ Call sign and
- ✓ MMSI number

The vessels shall only transmit LRIT data to the LRIT Data Centers nominated by their respective administrations.

Pursuant to SOLAS Section V, Rule 19/1; all cargo vessels with 300 GT and higher capacity, cruise liners, high-speed boats and offshore drilling units navigating internationally shall be equipped with LRIT. In this context, the vessels built after 31 December 2008 shall directly comply with this system and those built before 31 December 2008 shall comply with the system incrementally until the first radio survey after 01 July 2009.

**LRIT Current Situation**

Global data sharing has been launched in LRIT System as from 30.09.2009. The National LRIT Data Center of our country was installed by TÜRKSAT A.Ş. on behalf and under the coordination of Directorate General of Maritime and Inland Waters regulation in the physical environment of Radio Operation Directorate of the General Directorate of Coastal Security. In this context, the companies to carry out LRIT compatibility test on the vessels flying Turkish flag to be traced via the system in question have been authorized by our Directorate and the tests of all of about 600 vessels flying Turkish Flag have been completed and these vessels certified.

The National LRIT Data Center of our country has successfully passed the testing process coordinated by International Maritime Organization (IMO) and mandatory for data centers for integration with global LRIT system on 08/03/2010.

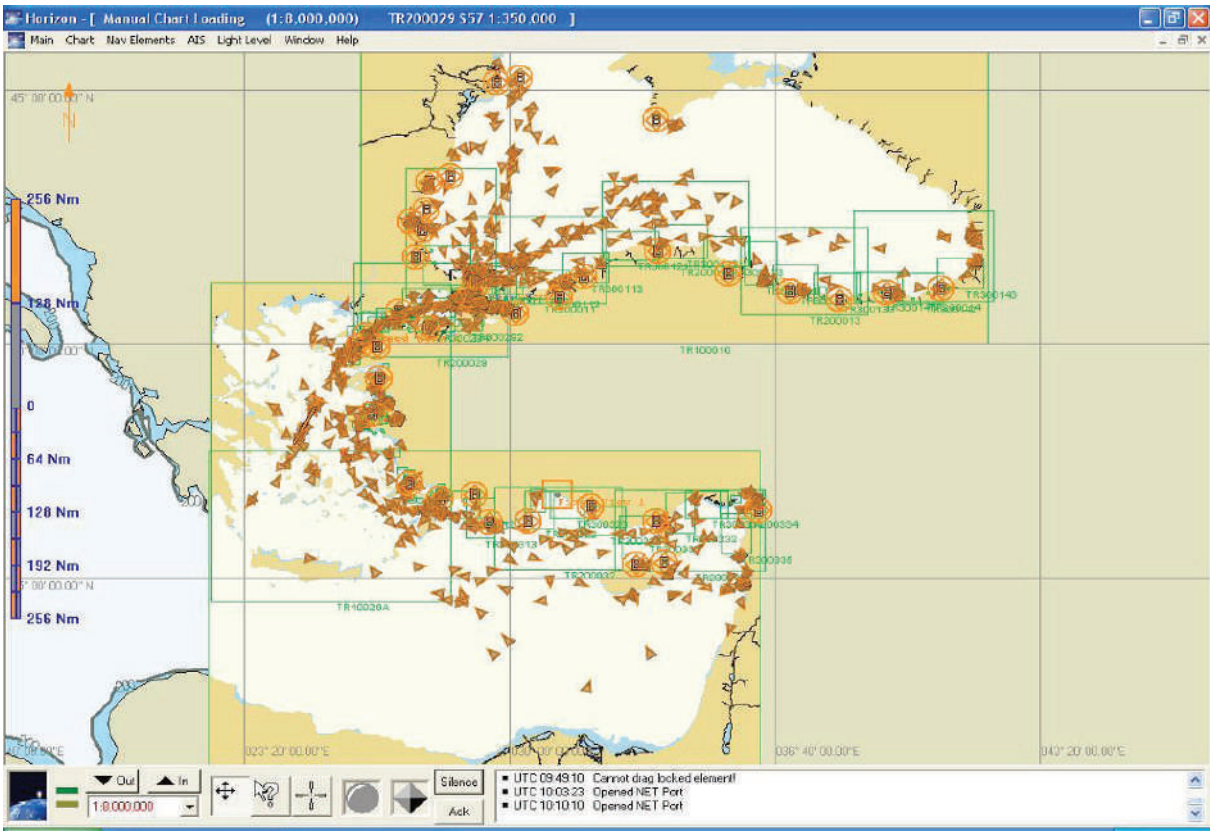
It has been possible with LRIT system to monitor the vessels flying Turkish flag everywhere in the world and vessels flying foreign flags for a distance of up to 1000 nautical miles from the coast. LRIT system operates by using INMARSAT satellites and the cost of the LRIT information requested is completely covered by the requesting Signatory States and there is no cost burden on vessels. The Signatory States' units providing Search and Rescue Services can obtain LRIT information with no charge for Search and Rescue purposes.

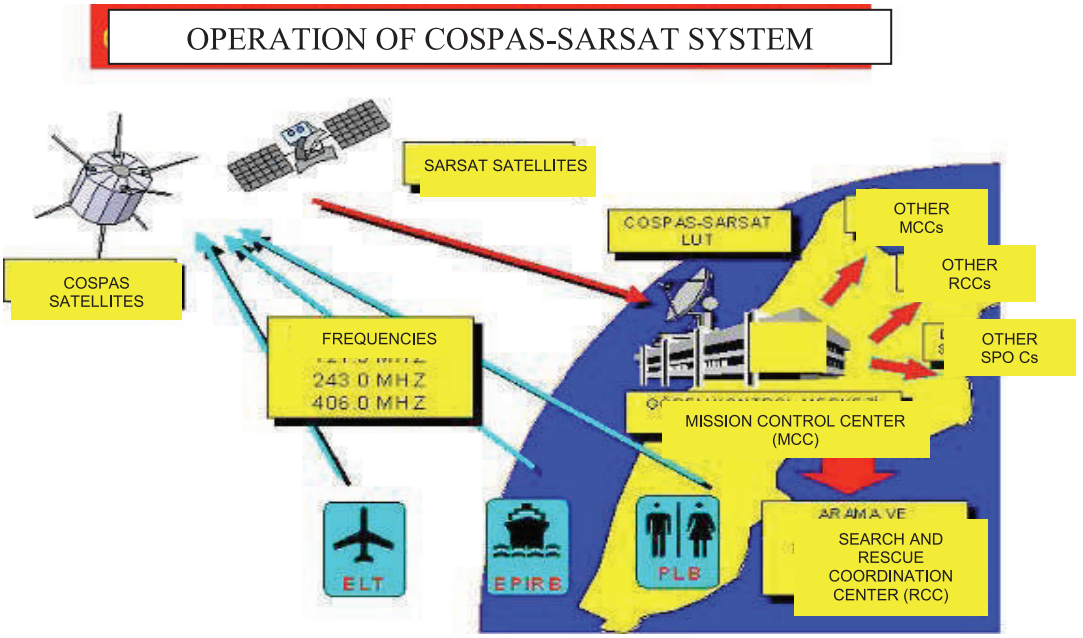
- **Main Search and Rescue Coordination Center (AAKKM)**

**Cospas-Sarsat System**

The Cospas-Sarsat (COSPAS: Cosmicheskaya Sistyema Poiska Avariynich Sudov- Space System for the Search of Vessels in Distress – SARSAT: Search And Rescue Satellite Aided Tracking) system is an international system ensuring detection via COSPAS and SARSAT satellites of the location of accident where any vessel, aircraft or persons have been engaged in an accident which notified by

signals they transmitted via 121.5 MHz, 243 MHz or 460 MHz frequency, and promptly taking of action for rescue required.




The COSPAS-SARSAT (COSPAS: *Cosmicheskaya Sistyema Poiska Avariynich Sudov- Space System for the Search of Vessels in Distress* – SARSAT:

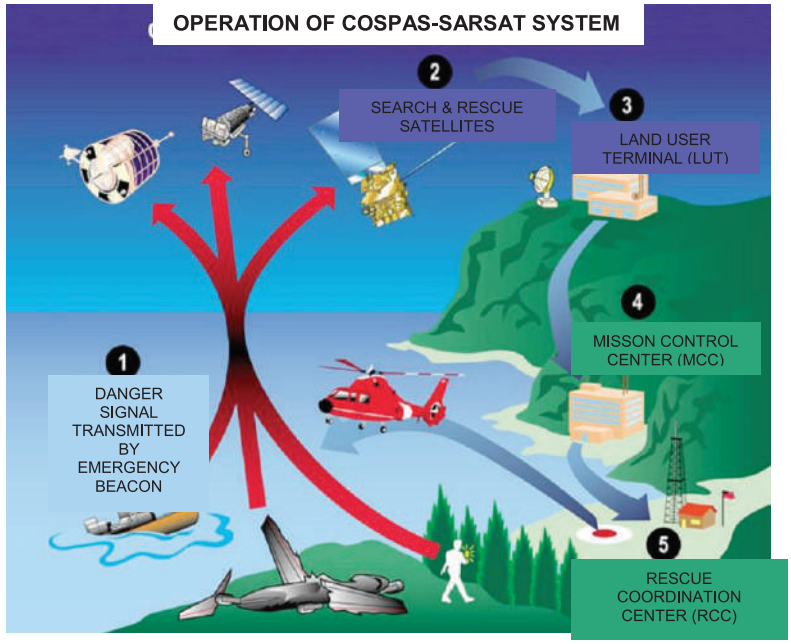
*Search And Rescue Satellite Aided Tracking*) system is an international system ensuring detection via the satellites of COSPAS-SARSAT system of the location of accident where any vessel, aircraft or persons have been engaged in an accident which notified by signals they transmitted via 460 MHz frequency, and promptly taking of action for rescue required.

The COSPAS-SARSAT system consists of a space section and ground section;

The space section consists of COSPAS, SARSAT and Geosynchronous satellites.

The ground section consists of transmitters / beacons (EPIRB, ELT, PLB) transmitting the danger signal, LUTs (Local User Terminal), MCC (Mission Control Center) and RCC (Rescue Coordination Centre).

Operation of the system may be summarized as follows: A danger signal is transmitted by the beacon in every direction at the time of accident, and this signal is received and sent to the earth by the satellites. These signals transmitted by the satellites are received by LUTs, and reflected to MCC with identity, location and other data. The MCC collects and evaluates these signals from LUTs and sorts necessary data (position, identity) and transmits them to relevant RCC. The RCC takes necessary search and rescue action in line with the data received.




Each country may have as many LUT as it desires, but not more than one MCC.

**Cospas-Sarsat System in TURKEY**

The system serves in Turkey with 3 LUTs, 1 MCC and 4 RCCs.

**2 Units of LEOLUT and 1 Unit of GEOLUT Unit:**

Installed at Esenboğa Airport.

LEOLUT



It is an earth receiver station. It receives the accident signals (460 MHz) and, if entered, the position data transmitted by the satellite, by tracing a stationary Geosynchronous satellite, it sets the actual frequency of the accident warning device and sends the device parameters to MCC.

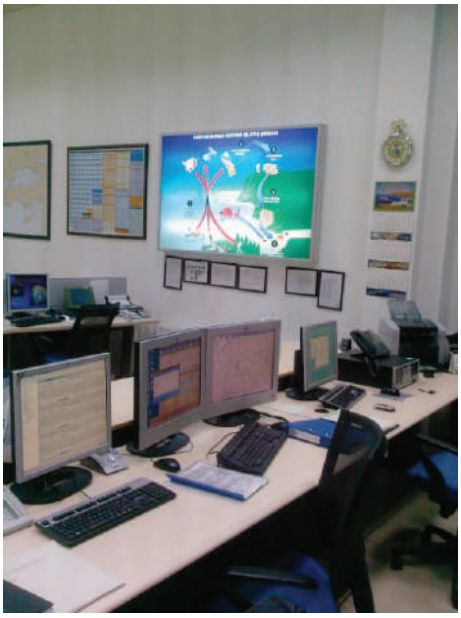
GEOLUT



It is a terrestrial receiver station. It receives accident signals (460 MHz) transmitted by satellites by tracing the satellites, and establishes the Doppler curves by separating the signals from the noise. It calculates the satellite locations using the Doppler curves to locate the accidents (A&B solutions). It sets the parameters of accident warning device and sends the device parameters to MCC.

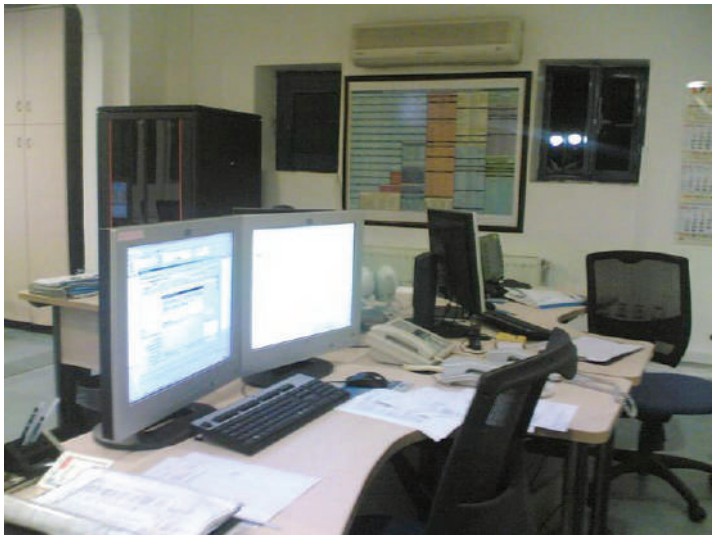
It is installed at the Main Search and Rescue Coordination Center of Directorate General of Maritime and Inland Waters regulation.

It monitors and controls the LUT operations. It analyses and filters the data received from LUTs and other MCCs. It sends these processed data to relevant RCCs and, if required, other MCCs. It ensures uninterrupted communications with other MCCs for 24 hours.



**4 units of RCC Units:**

1 unit of RCC is installed at the Main Search and Rescue Coordination Center of Undersecretariat for Maritime Affairs
1 unit of RCC is installed at the Turkish Coast Guard Command
1 unit of RCC is installed at Atatürk Airport
1 unit of RCC is installed at Esenboğa Airport.



**Application Details of TRMCC:**

1- The EPIRB - ELT - PLB and SSAS beacons on vessels, aircrafts or persons are activated at 406 MHz.
2- The activated signals are received by COSPAS-SARSAT LEOSAR and GEOSAR satellites.
3- Signals are transmitted to GEOLUTs and LEOLUTs located at Esenboğa via 1544,5 MHz carrier frequency.
4- The data processed in LUTs are sent to TRMCC located at AAKKM via the leased line.
5- If the data received at TRMCC are;

- in our own SRR; they are routed to relevant Search and Rescue Centers (Main AKKM, Naval AKKM, Air AKKM) depending on the location and nature of the signal detected.
- in SPOC SRRs; they are routed to the assigned search and rescue center of relevant country via AFTN and e-mail. TRMCC serves Iran, Iraq and Afghanistan, the SPCO countries in its service zone.
- in the service zone of another MCC; they are routed to relevant MCC as described in COSPAS-SARSAT A.001.

6- Necessary filing is performed.

### Meosar system

MEOSAR (Medium-Altitude Earth Orbiting Satellite System for Search and Rescue) system, which is also known as the next generation of COSPAS-SARSAT System will be implemented by MEO satellites which are planned to be used within COSPAS-SARSAT System as located at medium altitude (20.000 km).

Compared to the existing ones, MEO satellites provide a global coverage by moving so that it can cause a larger footprint and enable LUT to monitor multiple MEO satellites simultaneously and to locate the beacon position in a more rapid and sensitive way relative to the existing system.

In order for our country to benefit from the MEOSAR system, as result of the cooperation with the general Directorate of State Airports Operations, the purchasing process has been started and the installation of the system was completed in August 2010. Our country is the $6^{th}$ country which installed this system.

In addition to MEOSAR system, the existing COSPAS-SARSAT system was expanded and the system will have been modernized in the forthcoming decades.

With the MEOSAR system fully commissioned,

- All earth will be within the coverage,
- Any point on the earth can be viewed by multiple satellites at the same time,
- Localization even with only one signal will be possible,
- There will be only one resolved localization rather than A and B localizations which are caused due to Doppler shift calculation in the existing system,
- Localization and monitoring of a moving beacon will be possible.

10 satellites have already been launched by USA within the scope of MEOSAR System (*it is planned to use about 80 satellites when the system becomes fully operational*) and through the instrumentality of such satellites, the countries which have established their MEOLUTs has already started to collect analytic data. Data Exchange with Canada, United Kingdom and Brazil which previously established the system has started and active contribution is made to the development of the system with tests.


MARINE TOURISM

# CHAPTER VI

## MARINE TOURISM

Marine Tourism consists of Yachting Tourism, Marina Administrations, Cruise Tourism and Ferryboat Administrations, Underwater Diving and Water Sports.

With over 8.333 kilometers of coastline along the four seas, Turkey is a treasure chest of coves, inlets, bays and beaches at which yachtsmen can choose a different and private anchorage each night.

The sailing paradise of Turkey is also home to the Blue Voyage. This idyllic cruise means sailing with the winds, into coves and over the seas and becoming one with nature. For lovers of the active life, sailing in clear waters provides great opportunities for swimming, fishing, skiing, surfing and diving.

Sailing in Turkey also allows tourists to experience a truly enriching cultural exchange with the hospitable and gracious people of the costal villages and towns. The tempered winds which generally blow from the west and northwest make the long summers ideal for yachting, and seem to encourage an appreciation of nature. From some of the turquoise coast's unspoilt and sheltered bays mountain peaks rising to almost 3.000 meters above sea level can be seen.

In Turkey modern facilities and comfort have not overshadowed ancient hospitality and the slower pace of life.

Marine tourism revenue is 20 % percentage in the General Tourism

### ➢ Yacht Tourism

Yacht building industry in Turkey, is located mostly in Istanbul region and also in some parts of the Black Sea, Marmara Sea, Aegean Sea and the Mediterranean Region. The yachts, which are built in Aegean and the Mediterranean regions, are usually exported to Germany and Greece.

### ◆ Blue Voyage

"Blue Voyage" is the most authentic mode of travel of Turkey. The Gullet Tourism, other than bareboat concept, is a travel and vacation type that is derived from Blue Voyage tradition and peculiar to Turkey, which can be considered fully Turkish style. This is a type of yacht tourism performed with the vessels having permanent crew or multi-property yachts, which became famous at the classical, ultra-luxury or international races and then adapted to tourism, or in some exceptional cases, performed with yachts adapted from classical design basically.

Almost 75-80 % of the yacht fleet consists of traditional wooden or classical vessels sailing on the waters of Aegean and Mediterranean for hundreds of years. The blue voyage has made an evolution in terms of boat building technologies by adapting tradition to tourism.

The route of the Blue Voyage from Kusadasi down to Antalya covers and area of 350 sea miles. This route is shortened or lengthened according to the wish of the guest aboard. By choosing the most convenient cruise itinerary, one will experience the beauty of the Turkish cuisine and the congeniality of the traditional Turkish hospitality .

The best period to join the Blue Voyage is between April and November.

### ➢ Statistic of The Yachts & Capasity of The Registered Yachting Facilities

Most of the Turkey's marinas are located on the southern Aegean and Mediterranean coasts. These well-equipped ports contain all the services and provisions any yacht would require.

Table below shows the yacht marinas registered by the Ministry of Tourism.

**TABLE 65: Marine Tourisim Facility with Tourism Administration Certifiacate (2011)**

**Business Tourism Documentation of Yacht Harbour**

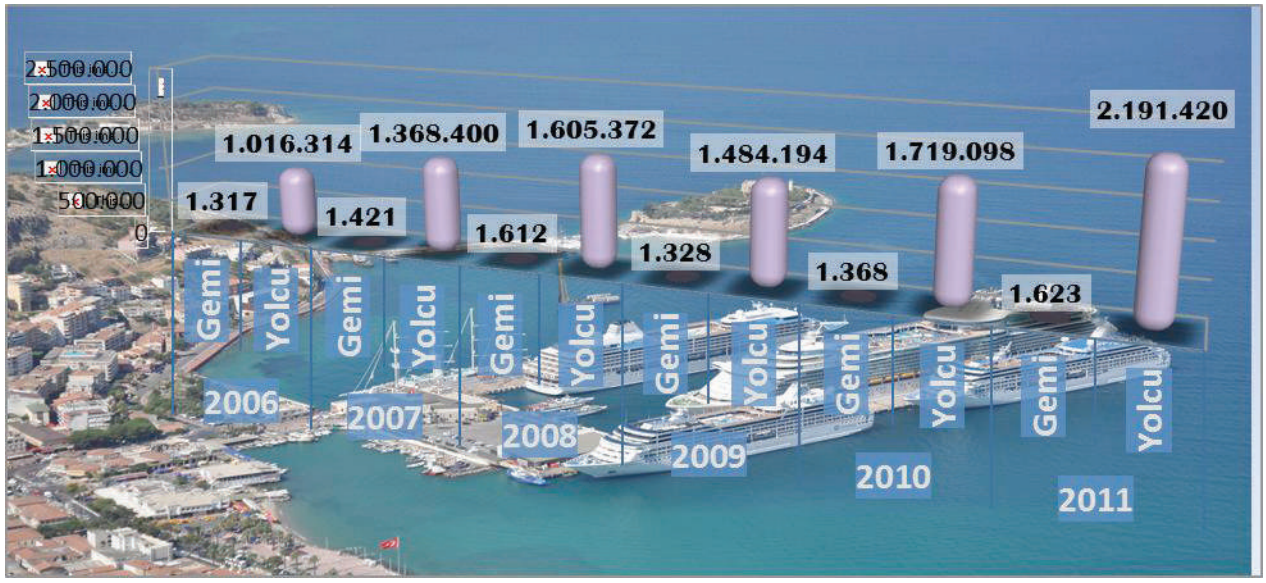
| | | | CAPACİTY | |
|---|---|---|---|---|
| **PORT NAME** | **TYPE** | **CİTY OF** | **AT SEA** | **ON SHORE** |
| 1-Setur Kuşadası Yacht Port | Main Yacht Port | Kuşadası / AYDIN | 310 | - |
| 2-Ataköy Yacht Port | Secondary Yacht Port | Ataköy / İSTANBUL | 700 | 40 |
| 3-Akdeniz Kemer Marina | Secondary Yacht Port | Kemer / ANTALYA | 150 | 150 |
| 4-Kaleiçi Yacht Port | Yacht Berthing Space | Kaleiçi / ANTALYA | 90 | - |
| 5-Altınyunus Yacht Port | Secondary Yacht Port | Çeşme / İZMİR | 90 | 60 |
| 6-Amiral Fahri Korutürk Yacht Port | Secondary Yacht Port | Fenerbahçe / İSTANBUL | 558 | - |
| 7-Marmaris Yacht Port | Main Yacht Port | Marmaris / MUĞLA | 676 | 122 |
| 8-Club Marina | Yacht Berthing Space | Göcek / MUĞLA | 121 | - |
| 9-Çelebi Marina | Secondary Yacht Port | ANTALYA | 200 | 150 |
| 10-Ayvalık Marina | Secondary Yacht Port | Ayvalık / BALIKESİR | 100 | - |
| 11-Kumlubükü Yacht Port | Yacht Berthing Space | Marmaris / MUĞLA | 10 | - |
| 12-Turgutreis Yacht Port | Main Yacht Port | Turgutreis/MUĞLA | 455 | 100 |
| 13-Ece marina | Yacht Berthing Space | Fethiye/MUĞLA | 230 | - |
| 14-Milta Bodrum Yacht Port | Secondary Yacht Port | Bodrum/MUĞLA | 348 | 50 |
| 15-My Marina Yacht Berthing Space | Yacht Berthing Space | Marmaris/MUĞLA | 48 | 15 |
| 16-D-Marin Didim Yacht Port | Main Yacht Port | Didim/AYDIN | 619 | 650 |
| 17-Port Göcek Marina | Third Ancchored Yacht Port | Fethiye/Muğla | 379 | - |
| **TOTAL** | | | **5084** | **1337** |
| **GRAND TOTAL** | | | **6421** | |

| Business Tourism Documentation of Yacht Slipway | | | | |
|---|---|---|---|---|
| 1-Atabay Turizm Yat Çekek Yeri | Yacht Slipway Facility | Gebze / KOCAELİ | - | 60 |
| 2-Ayvalık Yat Çekek Yeri | Yacht Slipway Facility | Ayvalık / BALIKESİR | - | 140 |
| 3-Albatros Yat Çekek Yeri | Yacht Slipway Facility | Marmaris / MUĞLA | 40 | 48 |
| 4-Yat Lift | Yacht Slipway Facility | Bodrum/MUĞLA | | 400 |
| 5-Ağanlar Yat Çekek Yeri | Yacht Slipway Facility | Bodrum/MUĞLA | - | 200 |
| 6-Göcek Yat Çekek Yeri | Yacht Slipway Facility | Fethiye/MUĞLA | - | 156 |
| **TOTAL** | | | **40** | **1004** |
| **GRAND TOTAL** | | | **1044** | |
| **Yacht Harbour Investment Tourisim Ducumantation** | | | | |
| 1-Alacatur Turistik Tesisleri Yacht Port | Secondary Yacht Port | Turgutreis / MUĞLA | 40 | 12 |
| 2-Meersea Körmen Yacht Port | Secondary Yacht Port | Datça / MUĞLA | 246 | 56 |
| 3-Martı Marina ve Yat İşletmeleri A.Ş. | Secondary Yacht Port | Marmaris / MUĞLA | 301 | 70 |
| 4-Kalkedon Marina | Secondary Yacht Port | Bodrum / MUĞLA | 200 | 200 |
| 5-Bodrum Yalıkavak Yacht Port | Main Yacht Port | Bodrum / MUĞLA | 336 | 100 |
| 6-Alaçatı Yacht Port | Main Yacht Port | Çeşme/İZMİR | 260 | 250 |
| 7-Ataport Yacht Port | Main Yacht Port | Zeytinburnu/İSTANBUL | 1000 | 100 |
| 8-Alanya Yacht Port | Main Yacht Port | Alanya/ANTALYA | 287 | 160 |
| 9-Marintürk Exclusive Göcek | Yacht Berthing Space | Göcek-Fethiye/MUĞLA | 96 | - |
| 10-Marintürk Göcek Village Port | Secondary Yacht Port | Göcek-Fethiye/MUĞLA | 116 | 200 |
| 11-Mandalya Yacht Berthing Space | Yacht Berthing Space | Milas/MUĞLA | 50 | - |
| 12-Çeşme Yacht Port | Main Yacht Port | Çeşme/İZMİR | 377 | 100 |
| 13-Burhaniye Yacht Port | Secondary Yacht Port | Burhaniye/BALIKESİR | 210 | 100 |
| 14-Yalova Yacht Port | Main Yacht Port | YALOVA | 240 | 80 |
| 15-Sığacık Yacht Port | 5 Anchored Yacht Port | Seferihisar/İZMİR | 400 | 80 |
| 16-Skopea Marina | Dock | Göcek/MUĞLA | 80 | - |
| **TOTAL** | | | **4239** | **1508** |
| **GRAND TOTAL** | | | **57477** | |
| **Location of Documents Yacht Tourism Investment** | | | | |
| 1-Marmarin Yat Çekek Yeri | Yacht Slipway Facility | Marmaris/MUĞLA | - | 200 |
| 2-Yat Marin Yat Çekek Yeri | Yacht Slipway Facility | Marmaris/MUĞLA | - | 100 |
| 3-Ege Yat Çekek Yeri | Yacht Slipway Facility | Milas/MUĞLA | - | 15 |
| | | | | |
| **TOTAL** | | | - | **315** |
| **GRAND TOTAL** | | | - | **315** |
| *Source:Ministry of Cultere and Tourisim 17.02.2011* | | | | |

## ➢ Cruise Tourism in Turkey

Cruise Tourism, which is one of the new industries in shipping sector, has emerged as a result of the rising demands of people for cruising with more modern ships. World cruise tourism has been developing with a great acceleration with more ships and increasing capacities. Cruise industry today offers a market of 25 Billion USD. Turkey is located in a suitable region for crusing sector, which is the Mediterranean Basin.

**GRAPH 62:** Statistics of Cruises and Passengers Arrived at Turkish Port Between **2006-2011**




**Cruise Ports of Turkey**

İstanbul
İzmir
Kuşadası
Fethiye
Marmaris
Bodrum
Antalya
Alanya
Mersin
Sinop
Samsun
Trabzon

In order to open İstanbul, one of the most important touristic centers of Turkey, to Cruise and Mega Yacht Tourism Services, great efforts are being exerted to develop the ports of Salıpazarı, Zeyport and Kazlıçeşme. Also, the activities have been accelerated to open Ataköy Marina to Cruise Tourism and to make it a Mega Yacht Port and Recreation Area.

**TABLE 66:** Number of Transit Passengers Coming by Cruise Ships (2003-2010)

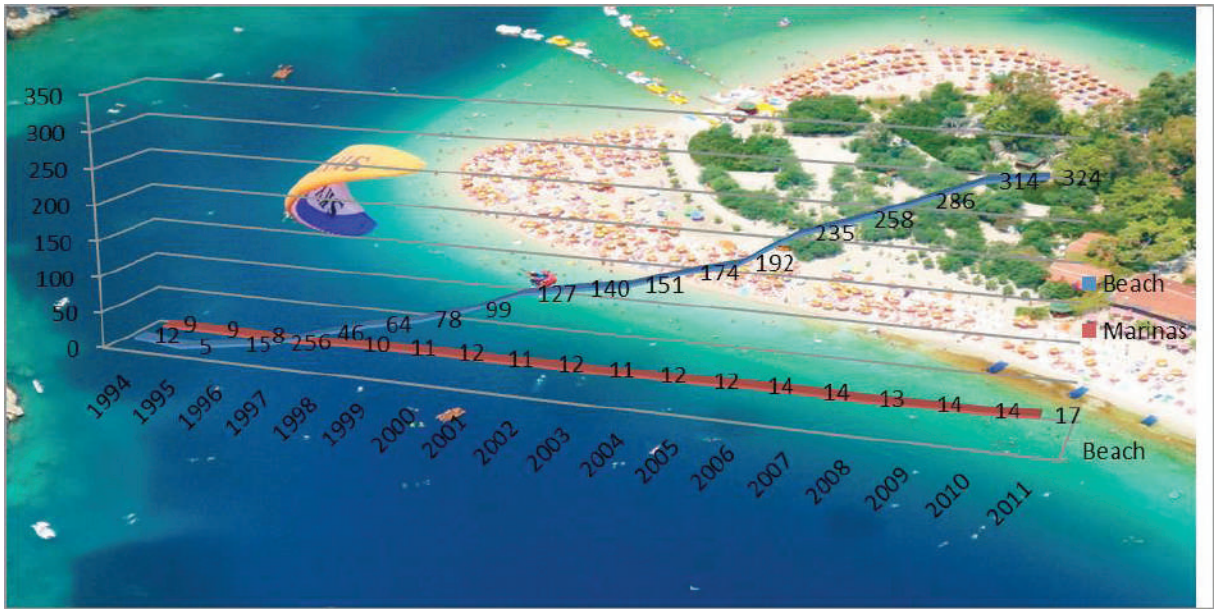
| PORT NAME | 2003 | | 2004 | | 2005 | | 2006 | | 2007 | | 2008 | | 2009 | | 2010 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | SHIP | PASSENGER | SHIP | PASSENGER | SHIP | PASSENGER | SHIP | PASSENGER | SHIP | PASSENGER | SHIP | PASSENGER | SHIP | PASSENGER | SHIP | PASSENGER |
| Alanya | 63 | 30.737 | 106 | 56.139 | 100 | 70.190 | 114 | 80.440 | 124 | 93.937 | 84 | 57.000 | 73 | 50.285 | 2 | 1.071 |
| Antalya | 92 | 48.012 | 63 | 51.049 | 40 | 30.424 | 32 | 13.015 | 34 | 15.680 | 41 | 25.057 | 23 | 12.549 | 41 | 103.859 |
| Bartın | - | - | - | - | - | - | - | - | - | - | 8 | 957 | 10 | 941 | 4 | 555 |
| Bodrum | 63 | 15.416 | 79 | 33.231 | 55 | 8.921 | 66 | 10.478 | 63 | 9.892 | 126 | 52.862 | 87 | 38.414 | 89 | 31.700 |
| Çanakkale | 23 | 3.629 | 25 | 4.191 | 33 | 7.460 | 24 | 5.008 | 23 | 5.207 | 31 | 8.776 | 33 | 8.712 | 17 | 7.670 |
| Çeşme | - | - | - | - | - | - | - | - | - | - | 3 | 1.819 | 1 | 817 | 16 | 9247 |
| Datca | - | - | - | - | - | - | - | - | - | - | 1 | 207 | 3 | 1.041 | 3 | 778 |
| Dikili | 25 | 16.661 | 23 | 6.405 | 19 | 4.444 | 23 | 3.990 | 13 | 2.631 | 29 | 10.424 | 13 | 6.592 | 26 | 15.401 |
| Fethiye | 22 | 2.532 | 21 | 3.682 | 7 | 3.157 | 67 | 3.566 | 4 | 948 | 13 | 4.217 | 8 | 2.615 | 5 | 879 |
| Göcek | - | - | - | - | - | - | - | - | - | - | 6 | 1.121 | 10 | 1.532 | 16 | 2.274 |
| Güllük | - | - | - | - | - | - | - | - | - | - | 19 | 2.747 | 5 | 1.172 | 1 | 279 |
| İskenderun | - | - | - | - | - | - | - | - | - | - | 3 | 819 | 2 | 1.884 | 1 | 106 |
| İstanbul | 199 | 200.079 | 141 | 114.390 | 202 | 176.768 | 306 | 273.553 | 340 | 422.896 | 404 | 489.544 | 313 | 476.541 | 342 | 508.246 |
| İzmir | 5 | 3.271 | 33 | 75.934 | 39 | 66.285 | 105 | 184.797 | 122 | 287.357 | 133 | 318.451 | 129 | 315.454 | 159 | 378.266 |
| Kaş | - | - | - | - | - | - | - | - | - | - | 6 | 600 | 4 | 1.341 | 8 | 1.317 |
| Kemer | - | - | - | - | - | - | - | - | - | - | 1 | 37 | 0 | 0 | 6 | 602 |
| Kuşadası | 337 | 225.330 | 348 | 221.417 | 441 | 301.105 | 471 | 368.696 | 613 | 466.677 | 601 | 518.872 | 506 | 462.746 | 517 | 493.911 |
| Marmaris | 51 | 32.977 | 74 | 74.753 | 97 | 83.094 | 83 | 65.265 | 64 | 60.039 | 70 | 101.874 | 74 | 81.472 | 84 | 146.531 |
| Mersin | - | - | - | - | - | - | - | - | - | - | 4 | 941 | 3 | 1.583 | 1 | 106 |
| Mudanya | - | - | - | - | - | - | - | - | - | - | 1 | 482 | 4 | 1.309 | 1 | 24 |
| Samsun | 0 | 0 | 1 | 257 | 3 | 1.364 | 9 | 2.661 | 8 | 186 | 5 | 596 | 9 | 1.524 | 4 | 825 |
| Sinop | - | - | - | - | - | - | - | - | - | - | 6 | 3.136 | 14 | 7.861 | 7 | 7.098 |
| Taşucu | - | - | - | - | - | - | - | - | - | - | 1 | 18 | 3 | 440 | 2 | 201 |
| Trabzon | 7 | 3.204 | 13 | 3.816 | 12 | 4.351 | 17 | 4.845 | 13 | 2.950 | 15 | 4.813 | 18 | 7.369 | 14 | 7.952 |
| Tuzla | - | - | - | - | - | - | - | - | - | - | 1 | 2 | 0 | 0 | 2 | 0 |
| **TOTAL** | **887** | **581.848** | **927** | **645.264** | **1.048** | **757.563** | **1.317** | **1.016.314** | **1.421** | **1.368.400** | **1.612** | **1.605.372** | **1.328** | **1.484.194** | **1.368** | **1.719.098** |

(Source: Undersecratariat of Maritime Affairs)

## ➢ Blue Flag Compaign

The Blue Flag Compaign is one of the four projects executed under the co-ordination of the Europe Environmental Education Foundation (FEEE). The Environmental Education Foundation of Turkey (TURCEV) designates which beaches and marinas have the right to display a Blue Flag, which is judged on the basis of cleanliness of water, environmental concerns, security, safety and services.

**GRAPH 63** Number of Turkish Beaches and Marinas with Blue Flags by Years




Source: TURÇEV

**TABLE 67 :** Number of Internatioanal Year of The Blue Flag in 2010

| BEACHES | | | MARINAS | | |
|---|---|---|---|---|---|
| 1 | Spain | 523 | 1 | Germany | 111 |
| 2 | Greece | 421 | 2 | Spain | 84 |
| 3 | France | 321 | 3 | Holland | 76 |
| 4 | Turkey | 314 | 4 | France | 74 |
| 5 | Portugal | 241 | 5 | Denmark | 69 |
| 6 | Italy | 231 | 6 | İtaly | 61 |
| 7 | Denmark | 216 | 7 | İsveç | 51 |
| 8 | Crothia | 116 | 8 | Crothia | 20 |
| 9 | Irland | 75 | 9 | Turkey | 14 |
| 10 | North Irland | 71 | 10 | Portugal | 14 |
| 11 | South Cyprus | 54 | 11 | Greece | 9 |
| | Other 27 Country | 301 | 12 | Other 21 Country | 44 |
| | TOTAL | 2884 | | TOTAL | 627 |

Nominees are evaluated by a national, then a European jury, after which the successful ones are awarded the Blue Flag for one year. The sea-water analysis is performed every 15 days during the high season by the local department of Ministry of Health, and funded by the Ministry of Tourism, and taking into account the physical, pH and microbiological parameters. (Source: Ministry of Culture and Tourism)

## ➢ UNDERWATER DIVING

In the seas of Turkey, divers can discover a fascinating submerged world, from underwater caverns to sunken ships and even the remains of ancient cities. The only areas prohibited to diving are military zones and areas under protection. Diving for scientific research is also prohibited.

### Equipped Diving Rules

**Forbidden Zones** All kinds of diving excluding scientific studies in military forbidden zones as well as regions in which there are Cultural and Natural Wealth Required to be protected underwater according to Official Gazette dated 19.08.1989 and numbered 20257 issuing 35th article of Decision of Board of Ministers, according to Cultural and Natural Wealth Protection Law Number 863.

**Certificate** Equipped divers for sportive purposes should have the proficiency certificate (diving card) issued by Underwater Sports, Life Guarding and Water Ski Federation. But certificates issued by educational organizations under international standards, are also valid. These certificates, can be upgraded to proficiency certificate (diving card) by applying to the Federation. Sportive diving authorizations, technical specifications and certificates are issued in compliance with the principles determined and accepted by Youth and Sports General Directorate, Underwater Sports Life Guarding and Water Ski Federation. As regards to sportive diving for foreign divers, they should be a member of International Underwater Sports Federation or national organizations or have a certificate issued by authorized organizations or institutions of their countries.

**Responsibility** Diving and life security of the divers belong to divers themselves, but during training all the responsibility is with the lecturer. When diving in Turkey, taking guide skin diver is obligatory. Foreign divers should take guide skin diver during diving. Also, protection of cultural and natural wealth, maintaining of property and life security of divers during diving, are under the responsibility and obligation of guide skin diver. However, existing problems and personal mistakes of divers who violate rules is not within the scope of responsibility of guide skin diver.

**Material** There is no limit for equipment during sportive diving. Balance vest (life vest, BC), tube pressure monitor, depth monitor and time hour usage is obligatory. Usage of lifting balloon or similar materials is forbidden.
Decompressed dives are completely forbidden. High pressurized tube filling compressor in land or in ships, which requires permission from

corresponding authorities, can be present during diving.
Agency, club, establishment, hotel, holiday village, school etc. who organize diving, as well as ships should provide first aid material in stock. Underwater photographing and video cameras and all kinds of related materials can be used during diving.

**Material Maintenance**

Tourism agencies, yacht operators, organizations and institutions as well as underwater clubs organizing sportive diving should perform periodic test and maintenance of diving materials (such as tube regulator, balance vest) used and owned by skin divers. These tests can be performed at civil skin diving firms, agencies or organizations authorized by Ministry of Industry and Commerce.

**Ships to be used during dives**

During underwater diving, using Turkish flag ships is a must. However, if permission is taken for foreign groups who wish to dive from their own boats, they can be used as well.

**Diving permission**

Equipped sportive diving is subject to permission. City Tourism Directorate or authorized body should be informed by clubs, organizations or institutions in order to organize diving to regions excluding forbidden zones. This information is submitted to Regional Coast Guard by correspondent authority.
All kinds of equipped sportive diving are subject to permission for foreign divers. Authorities who issue these permissions are City Tourism Directorate or authorized bodies. One copy of permission forms issued is submitted to Harbor Master and one copy is submitted to Regional Coast Guard by the issuing authority. One copy of the permission should be kept by organizers at all times and should be shown to authorities during controls. Taking permission and submitting information is not obligatory during training and diving with double person system.



# TURKISH FISHING SECTOR

## CHAPTER VII

### TURKISH FISHING SECTOR

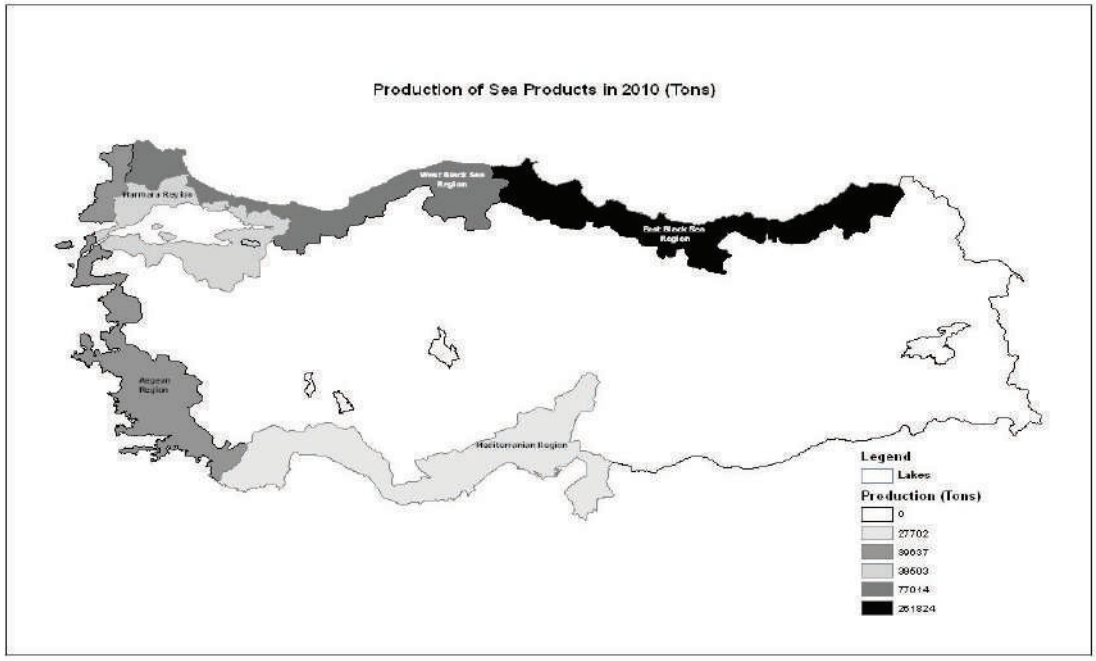
Turkey has a rich water products potential.The seas around Anatolia has variant and distinct ecological characteristics. The area of natural lakes is 178,000 km², and the area of dams is 3,442 km².

Our Seas are 500 fish sepecies. Turkey has a share of 0.04 % in the total world water production.

60-80 % of Turkey's water products consist of pelajic fish. Pelajic fishes are mainly anchovy (Engraulis encrasicholus) and pilchard (sardina pilcharolus). Other important pelajic species are horse mackerel (Trachurus trachurus), çaça (sprattus sprattus), tirsi (Alosa alosa), chup mackerel (scomber japonicus), mackerel(scomber scombrus), blue fish (Pamatomus saltatrix), atlantic bonito (Sarda sarda) and blue fine tuna (Thunnus thynnus).Major deep sea fishes are hake (Merluccius merluccius), whitting (merlangius merlangus euxinus), stripped mullet (Mullus barbartus) and red mullet (Mullus surmelatus). Amongst the flat fishes, (Scophthalmidae-Soleidae), sea bass (Dicentrarchus labrax), hani (Serranidae), species shrimp (Penaeidae) and species squid (Loliginidae and Ommastrephidae) can be considered.

Annual fish production of Turkey is 1 million tons. 80 % of fish production comes from sea, 10% from inland water production, and 10 % from farming production.

**GRAPH 64:** Distrubition of Fisheries Production Volume (2010)



Production of water products, specially in 1970's, showed a rapid development as a result of low interest credits provided by the State and by customs tax exemptions and increase both in the number of fishing vessels and in the strenght of catch.The production of fish products realized approximately as 180.000 tons has increased above 700.000 tons.

**In 2009 years;**

Fishery production decreased by 3,58% in 2009 with respect to the previous year and became approximately 623 thousand tons. The total fishery production consisted of sea fish by 61,12%, other sea products by 7,13%, inland water products by 6,29% and aquaculture by 25,47%.

The capture production was 464 462 tons and aquaculture production became 158 729 tons. 48,04% of the amount of aquaculture production took place at the inland waters and 51,96% at the seas. The most important types produced at the inland waters are trout by 47,66%, sea bass 29,33% and sea bream by 17,87% at sea.

Sea products production showed an decrease of 6,14% and became 425 thousand tons.Of all the sea production, East Black Sea is the first by the ratio of 57,81%. West Black Sea follows it by 15,89%, Aegean by 11,15%, Marmara by 8,28%, and Mediterranean by 6,87%.

Anchovy production which is one of the important types of sea fish was about 205 thousand tons, showing an decrease of 18,67%. The catch of this number used for domestic consumption was about 115 thousand tons and decreased by 26,58% and the amount sent to fish meal factories was 90 thousand tons, with an decrease of 5,78%. Sprat production with 53 thousand tons has a ratio with 14,02% after anchovy.

The production showed an increase for pilchard by 71,64%, sprat by 35,83%, atlantic bonito by 9,12% while it decreased for scad by 21,39%, grey mullet by 10,70%, whiting by 8,87% and horse mackerel by 7,96%.

Other sea products production decreased by 22,70% with respect to the previous year. Striped venus, of the other sea products, has the highest ratio of 55,33%.

## Increase in Capture Production and Aquaculture Production 2010

### Increase in fishery production by 4,83%

Fishery production increased by 4,83% in 2010 with respect to the previous year and became approximately 653 thousand tons. The total fishery production consisted of sea fish by 61,20%, other sea products by 7,05%, inland water products by 6,16% and aquaculture by 25,59%.

### Increase in capture production by 4,68% and in aquaculture by 5,30%

The capture production was 485 939 tons and aquaculture production became 167 141 tons. 47% of the amount of aquaculture production took place at the inland waters and 53% at the seas. The most important types produced at the inland waters are trout by 46,77%, sea bass 30,39% and sea bream by 16,85% at sea.

### Increase in marine production by catching by 4,85%

Sea products production showed an increase of 4,85% and became 446 thousand tons.Of all the sea production, East Black Sea is the first by the ratio of 58,75%. West Black Sea follows it by 17,28%, Aegean by 8,89%, Marmara by 8,86%, and Mediterranean by 6,22%.

### Changes in fish species

Anchovy production which is one of the important types of sea fish was about 229 thousand tons, showing an increase of 11,88%. The catch of this number used for domestic consumption was about 116 thousand tons and increased by 1,23% and the amount sent to fish meal factories was 113 thousand tons, with an increase of 25,41%. Sprat production with 57 thousand tons has a ratio with 14,27% after anchovy.

The production showed an increase for atlantic bonito by 33,61%, whiting by 21,64%, sprat by 6,81% grey mullet by 4,42% while it decreased for horse mackerel by 29,36%, scad by 23,31% and pilchard by 8,15%.

Other sea products production increased by 3,63% with respect to the previous year. Striped venus, of the other sea products, has the highest ratio of 58,52%.

### Increase in inland water products production by catching by 2,74%

In 2010, inland water production increased by 2,74% with respect to the previous year and became 40 thousand tons. Common carp, which has an important share in the inland water products, increased by 9,98% and tarek showed a increase by 6,52%.

**TABLE 68:** Production of Fisheries Exports, Imports and Consumption (1996-2010)

| | Production (Ton) | Export(Ton) | Import(Ton) | Domestic concuption (Ton) | Processed(Ton) | Not processed (T on) | Per capital consuption (Kg) |
|---|---|---|---|---|---|---|---|
| 1996 | 549.646 | 12.785 | 29.648 | 540.564 | 17.842 | 8.103 | 8,602 |
| 1997 | 500.260 | 18.402 | 39.829 | 490.339 | 21.000 | 10.348 | 7,663 |
| 1998 | 543.900 | 11.558 | 31.417 | 528.935 | 30.000 | 4.824 | 8,119 |
| 1999 | 636.824 | 15.955 | 39.552 | 503.249 | 150.000 | 7.172 | 7,590 |
| 2000 | 582.376 | 14.533 | 44.230 | 538.764 | 71.000 | 2.309 | 7,985 |
| 2001 | 594.977 | 18.978 | 12.971 | 517.832 | 62.755 | 8.383 | 7,547 |
| 2002 | 627.847 | 26.860 | 22.532 | 466.289 | 156.000 | 1.230 | 6,697 |
| 2003 | 587.715 | 29.937 | 45.606 | 470.131 | 120.000 | 13.253 | 6,649 |
| 2004 | 644.492 | 32.804 | 57.694 | 555.859 | 105.000 | 8.523 | 7,812 |
| 2005 | 544.773 | 37.655 | 47.676 | 520.985 | 30.000 | 3.809 | 7,229 |
| 2006 | 661.991 | 41.973 | 53.563 | 597.738 | 60.000 | 15.843 | 8,191 |
| 2007 | 772.323 | 47.214 | 58.022 | 604.695 | 170.000 | 8.436 | 8,567 |
| 2008 | 646.310 | 54.526 | 63.222 | 555.275 | 95.742 | 3.989 | 7,812 |
| 2009 | 622.962 | 54.354 | 72.686 | 545.368 | 90.211 | 5.715 | 7,569 |
| 2010 | 653.080 | 55.109 | 80.726 | 505.059 | 168.073 | 5.565 | 6,918 |

**TABLE 69:** Quantitiy and Volue of Fish Products (2006-2010)

| | Quantity (Tons) / Value ( TL) | Sea products | | Aquaculture production | | Freshwater products |
|---|---|---|---|---|---|---|
| | | Sea Fish | Other sea products | Inland water | Marine water | |
| **2006** | | | | | | |
| | Quantity | 409 945 | 79 021 | 56 694 | 72 249 | 44 082 |
| | Value | 1 385 654 500 | 192 960 000 | 240 782 500 | 525 447 250 | 128 368 500 |
| **2007** | | | | | | |
| | Quantity | 518 201 | 70 928 | 59 033 | 80 840 | 43 321 |
| | Value | 1 077 682 500 | 116 822 250 | 265 498 500 | 574 264 000 | 128 647 000 |
| **2008** | | | | | | |
| | Quantity | 395 660 | 57 453 | 66 557 | 85 629 | 41 011 |
| | Value | 870 455 400 | 112 518 000 | 266 555 080 | 584 091 000 | 114 205 000 |
| **2009** | | | | | | |
| | Quantity | (1) 380 636 | 44 410 | 76 248 | 82 481 | 39 187 |
| | Value | 648 105 810 | 64 418 660 | 324 497 250 | 628 438 250 | 124 863 410 |
| **2010** | | | | | | |
| | Quantity | 399 656 | 46 024 | 78 568 | 88 573 | 40 259 |
| | Value | 838 416 410 | 97 404 690 | 338 205 100 | 728 573 500 | 142 694 100 |

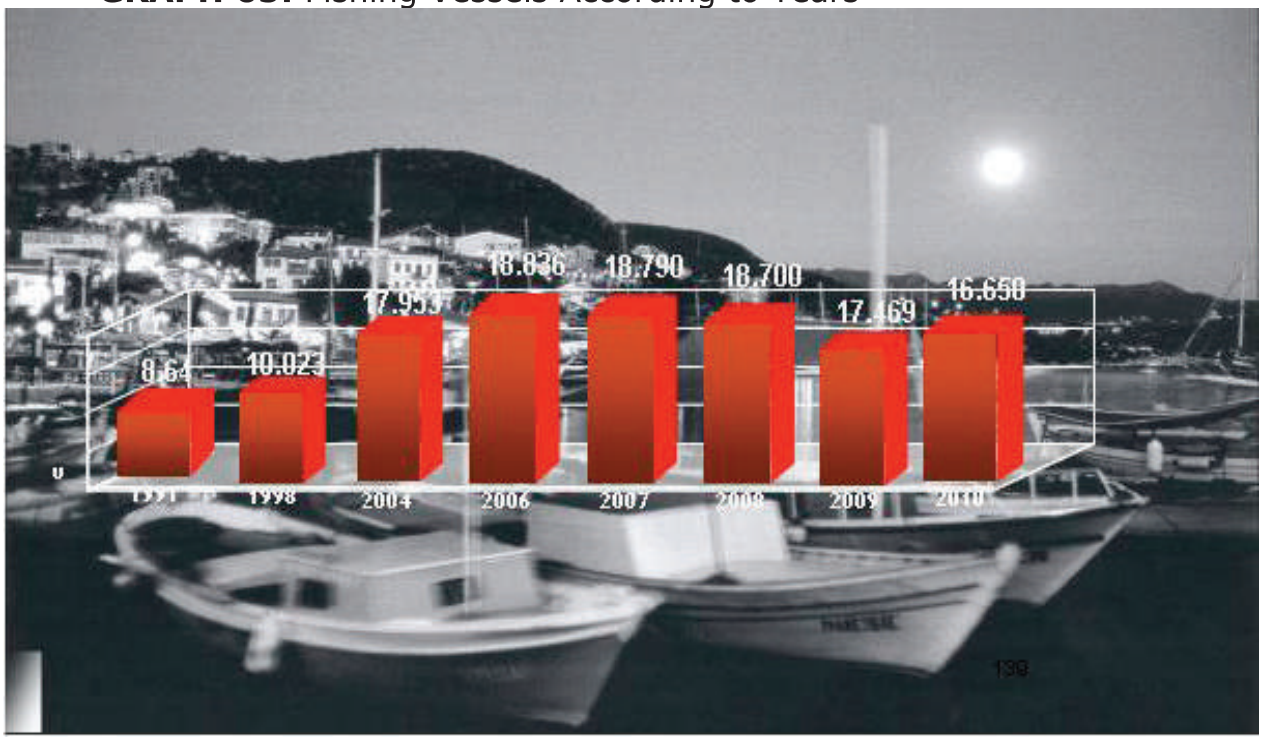
(1) Capture of sea fish production of the year of 2009 is revised.

## Fishing Fleet and Catching Water Products

The fishing technology in Turkey is considered to be efficient. Seaborn fishing is being done by artisanal fishing (extension meshes,drag side meshes,pareketa,fish trap) and industrial fishing (Purserseine-trawler)

The types of fishing, common in Turkey are short distance fishing and shore fishing (medium distance fishing). The ocean type (off-shore) fishing is in the beginning process. As of end of 2008, there are 128 fisherman shelters, 44 smaller type of fisherman shelters and 58 slips.

**GRAPH 65:** Fishing Vessels According to Years




Corporate bodies and persons should have fishing certificates according to Water Products Law Number 1380. The Ministry of Agriculture may restrict the certificates in order to protect of fishing potential. There are 18,790 certificated fishing vessels in Turkey and 1,010 are of big sizes. Dredging and encircle fishing is done by the fishing vessels longer then 12 meters. The Black Sea Region has the major share in fishing sector in Turkey with 1640 km coast line: there are 202 fisherman shelters and slips. In İstanbul, there are 44 shore facilities, consisting of 8 ports, 26 fisherman shelters, and 10 slips.

Fishing vessels in Turkey are generally small vessels, which are suitable for shore fishing. There are 16,650 fishing vessels in total and 83 % of these boats consists of vessels of 5-12 meters which perform shore fishing.

Production distribution of large scale fishermen, collected through survey and having vessels bigger than 10 meters, which have an important share in capture production and small sacale fishermen,collected through survey, having vessels equal to or less than 10 meters

**TABLE 70:** By Nature of Fishing Vessels (2006-2010)

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Operating type | | | | | |
| Trawler | 725 | 655 | 543 | 552 | 669 |
| Purseseiner | 543 | 493 | 526 | 505 | 485 |
| Trawler-Purseseiner | 394 | 423 | 469 | 431 | 337 |
| Carrier vessels | 202 | 252 | 213 | 156 | 130 |
| Other | 15 959 | 15 858 | 15 410 | 15 201 | 15 029 |
| Material of construction | | | | | |
| Wood | 16 747 | 16 560 | 16 007 | 15 748 | 15 497 |
| Sheetiron | 943 | 1 051 | 1 071 | 1 014 | 1 020 |
| Fiberglass | 133 | 70 | 83 | 83 | 133 |
| Group of tonnage (groston) | | | | | |
| **1 - 4** | 13 024 | 13 423 | 13 155 | 12 783 | 12 423 |
| **5 - 9** | 2 352 | 1 904 | 1 753 | 2 033 | 2 132 |
| **10 - 29** | 1 224 | 1 132 | 1 054 | 902 | 952 |
| **30 - 49** | 399 | 404 | 393 | 376 | 373 |
| **50 - 99** | 381 | 396 | 371 | 368 | 413 |
| **100 - 199** | 282 | 291 | 291 | 272 | 247 |
| **200 - 499** | 144 | 112 | 127 | 97 | 98 |
| **500+** | 17 | 19 | 17 | 14 | 12 |
| Group of horsepower (kw) | | | | | |
| **1 - 9.9** | 6 104 | 6 658 | 6 141 | 6 490 | 6 026 |
| **10 - 19.9** | 3 519 | 3 172 | 2 651 | 2 508 | 2 407 |
| **20 - 49.9** | 3 446 | 3 435 | 3 297 | 3 402 | 3 629 |
| **50 - 99.9** | 1 801 | 1 802 | 2 147 | 1 924 | 1 960 |
| **100 - 199.9** | 1 666 | 1 305 | 1 598 | 1 327 | 1 363 |
| **200 - 499.9** | 880 | 823 | 826 | 803 | 868 |
| **500+** | 407 | 486 | 501 | 391 | 397 |
| Group of length (meters) | | | | | |
| **1 - 4.9** (1) | 158 | 226 | 159 | - | - |
| **5 - 7.9** | 10 051 | 9 882 | 9 448 | 9 312 | 9 196 |
| **8 - 9.9** | 5 022 | 4 938 | 4 855 | 4 947 | 4 871 |
| **10 - 11.9** | 623 | 606 | 666 | 748 | 728 |
| **12 - 14.9** | 640 | 625 | 664 | 585 | 603 |
| **15 - 19.9** | 482 | 485 | 467 | 422 | 420 |
| **20 - 29.9** | 641 | 637 | 632 | 623 | 609 |
| **30 - 49.9** | 194 | 264 | 255 | 198 | 215 |
| **50+** | 12 | 18 | 15 | 10 | 8 |
| Situation of generator usage (kw) | | | | | |
| Without generator | 17 133 | 16 855 | 16 311 | 16 162 | 15 938 |
| Power group of generator | | | | | |
| **1 - 5** | 82 | 61 | 76 | 40 | 37 |
| **6 - 10** | 54 | 53 | 78 | 65 | 44 |
| **11 - 20** | 61 | 67 | 49 | 43 | 37 |
| **21 - 50** | 129 | 159 | 170 | 145 | 169 |
| **51 - 99** | 145 | 210 | 222 | 187 | 197 |
| **100+** | 219 | 276 | 255 | 203 | 228 |
| Situation of size of deep freeze depot ($m^3$) | | | | | |
| Without deep freeze depot | 6 880 | 16 749 | 16 266 | 15 963 | 15 605 |
| Size of deep freeze depot group | | | | | |
| **1 - 10** | 517 | 485 | 541 | 420 | 635 |
| **11 - 20** | 196 | 215 | 177 | 244 | 208 |
| **21 - 50** | 149 | 159 | 122 | 169 | 143 |
| **51+** | 81 | 73 | 55 | 49 | 59 |

TurkStat, Fishery Statistics, 2010

(1) The length of vessel 1-4.9 is out of coverage in 2009 and 2010.

## Water Production Facilities

According to Article 13 of the Law of Water Products, No:1380, water products farming in Turkey is made by the permission of the Ministry of Agriculture and Village Affairs. In order to arrange more orderly practicing of water products farming, to keep its effects on environment at minimum level, to achieve healthy and quality fish production ; instead of applying the Circular called “Methods and Principles of Water Products Farming” dated 11.10.1999 and serial number 8300, No:SUDB/1999-1, within the frame of rules of harmonization of the European Union Joint Shipping Products Policy Acquirements; “The Regulation of Water Products” was published in the Official Products Gazette dated 29.06.2004, No.25507 and was carried into effect.

In 1971, there was only one water product facility, whereas at the end of 2002 there were 1840 certified facilities, 1,417 of them are inland water and 423 of them are seaborn production facilities. Head Sea Bream and the Sea Bass facilities are located generally at Southern Agean and West Mediterranean. Trout facilities are generally located in The Black Sea Region . Cultivated fishing production was 4,100 tons in 1988 whereas at the end of 2008 this production reached 152.186 tons.

Put into production at the country's current potential for the development of the fisheries is of great significance. The baby needed to aquaculture, collected from nature or produced in hatcheries can be imported from abroad are provided.

Aquaculture production in 2008 at a rate of 8.8% compared to the previous year has increased. Aquaculture production in marine and Inland Waters in 2008, an increase by 8.8% over the previous year was approximately 152 thousand tons.

Aquaculture production in 2008 as the amount of 43.73% of daily Inland Waters, 56.27% 's were carried out in the sea. According to the previous year in 2008, the aquaculture production in the sea at a rate of 5.92%, içsulardaki Aquaculture production has increased at a rate of 12.75%.

Inland Waters 43.32% with the most important species reared trout, sea bass with 32.37%, 20.81% is with the largemouth.The most important species reared trout Inland Waters with 41.8%, with 30% in sea bass, sea bream is 24%.

## Foreign Trade in Water Products

### Exports

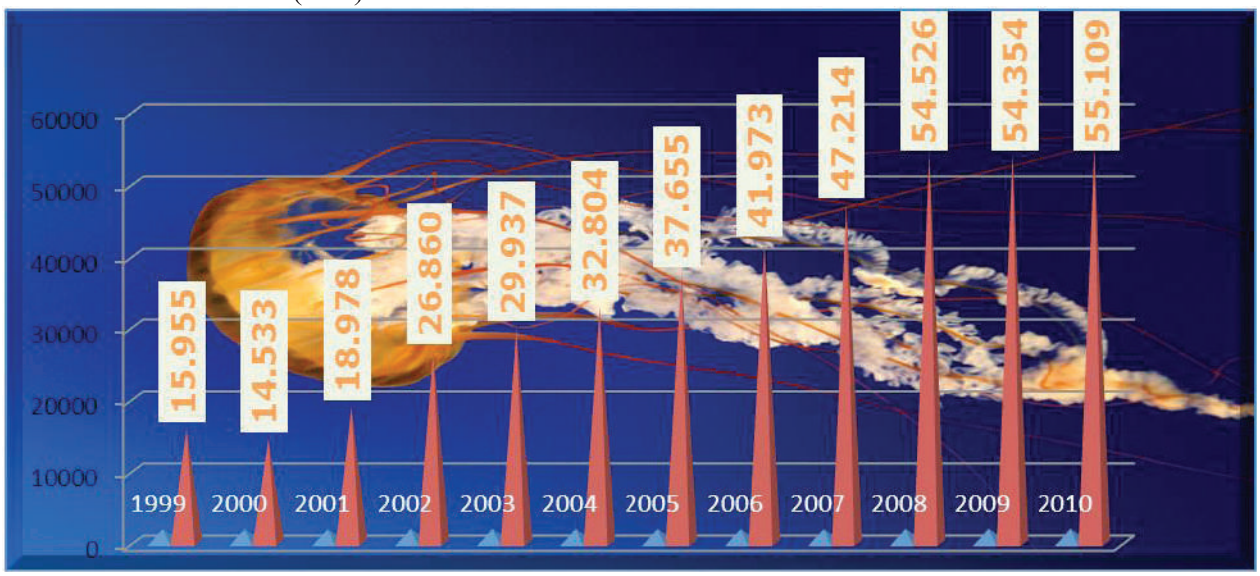
In the previous years, major part of Turkish export water products consisted of frozen fish; but currently it consists of canned fish. Export of canned-fish, is mostly realized to Germany, England, Belgium, Spain, Italy and France. Export to Far East is also developing and some of the main markets are Japan and Hong Kong. Today, most of our exports in water products is realized to Japan by 28 %.

15,955 in 1999 (tons), 55,109 In 2010 the exports (tons), reaching the last elevan years, according to the amount of exports increased nearly 170 % has been achieved. Seafood export figures available are examined, the amount and value of our exports in the past year has continued to increase with benchmarks.

As regards 2010 in our country's exports of fish products Japan has the biggest share, being followed by Holland, Greece, Italy, Spain, German, France and Lebanon . Although the markets to which our water products exportation is directed are mostly those of the European Union, we also export fish to all the regions of the world.

**GRAPH 66: Exports of Water Production (1999-2010)**

Amount (Ton)




## Import

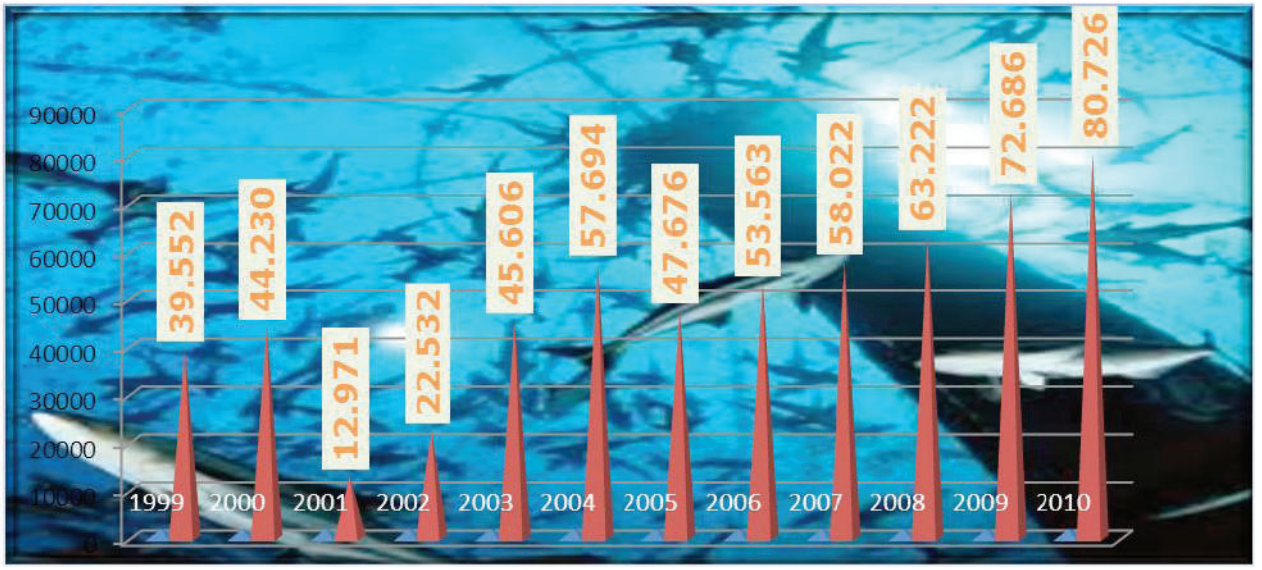
There is an increase in sea food imports. 90 % of sea food imports consists of frozen fish. An impo120 rtant share in import is from The Danube where Tuna fish comes. Import of this fish is made from the European Union countries (especially Holland, UK, and Norway), also from some of the African countries (Ghana) and the Far Eastern countries (Singapore,Thailand)

39,552 in 1999 (tons), 80,726 In 2010 the exports (tons), reaching the last elevan years, according to the amount of exports increased nearly 100 % has been achieved.

As regards 2010, in our country's imports of fish products Norway has the biggest share, being followed by France, India, USA, Morocco , Georgia and Greece

**GRAPH 67:Imports of Water Products 1999 – 2010**

(Amount (Ton))




### Water Products Processing Industry

Technological improvements and changes are applied in water treatment industry and new water products from our own resources are treated and supplied to the market. A major amount of water products is supplied for fresh consumption, 4 % for fish flour and oil, and 10 % for water products treatment and utilization facilities .

Various products such as frozen inland and sea products, pre-cooked crayfish, tuna, anchovy, pilchard, canned horse mackerel, salted/corned anchovy, smoked trout, snakefish, salmon fish are produced by treatment industry using different sources. Facilities treating and utilizing water products are increasing , and studies are carried in order to comply with the provisions of Water Products Law No: 1380, Water Products Regulation and European Union Directives.




# MARINE TRAINING

## CHAPTER VIII

# MARITIME EDUCATION

Ministry of Transport, Maritime Affairs and Communications is the main authoritiy in Turkey in the field of shipping. Ministery issued Regulations for Seafarers so that to adopt maritime training to IMO standards in 2002. Turkey is in the white list with regard to seafarers training since 2000 and the Turkish certificates and diplomas are accepted as equal on the part of IMO

Turkish Chamber of Shipping, one of the most important NGO's of maritime sector, strongly supports the Maritime Education and considers the maritime training as one of its administrative and main functions. In this framework; First Priority: has been given to the lack of Officers Problem and as such the main objective has been to provide a solution to it in the long and medium terms. Second Priority: has been given to the training of highly qualified and sufficient numbers of Maritime Operators.

Turkish Maritime Education Foundation (TÜDEV) was established in Istanbul on 7 January 1993 by 52 founder members, most of whom were from the maritime community. The aim of the Turkish Maritime Education Foundation is to help Turkish Maritime Shipping's reaching to a high level to create Shipping Policies that will help to increase the economical strength and productivity of our Country and will support the development of maritime schools and educational foundations in Turkey both as the level of maritime education and the related facilities.

There are 11 faculties of maritime studies ( including one in Northern Cyprus Turkish Repuplic) which supplies education at bachelor's level ( four years), 12 Anatolian High Schools and 62 Anatolian Technical High Schools. Piri Reis University was established in 2008 and a modern university campus was constructed in Tuzla/ İstanbul. A list of maritime schools and the number of students are shown below.

## FACULTIES OF MARITIME STUDIES

1 Zirve Üniversitesi Deniz Ulaştırma İşletme Mühendisliği
2 Dokuz Eylül Üniversitesi - Denizcilik Fakültesi
3 İstanbul Teknik Üniversitesi - Denizcilik Fakültesi
4 İstanbul Üniversitesi - Mühendislik Fakültesi
5 Karadeniz Teknik Üniversitesi - Sürmene Deniz Bilimleri Fakültesi
6 Kocaeli Üniversitesi - Barbaros Denizcilik Yüksekokulu
7 Piri Reis Üniversitesi - Denizcilik Yüksek Okulu
8 Rize Üniversitesi - Turgut Kıran Denizcilik Yüksekokulu
9 Yakın Doğu Üniversitesi - Denizcilik Fakültesi
10 Yıldız Teknik Üniversitesi - Makine Fakültesi
11 Zonguldak Karaelmas Üniversitesi - Deniz işletmeciliği ve Yönetimi Yüksekokulu

## MARITIME ANATOLIAN HIGH SCHOOLS

1 Bahçeşehir Üniversitesi - Meslek Yüksekokulu
2 Çanakkale Üniversitesi - Gelibolu Piri Reis Meslek Yüksekokulu

3 Galatasaray Üniversitesi - Meslek Yüksekokulu
4 İstanbul Teknik Üniversitesi - Meslek Yüksekokulu
5 Kocaeli Üniversitesi - Karamürsel Meslek Yüksekokulu
6 Mersin Üniversitesi - Deniz ve Ticaret Meslek Yüksekokulu
7 Ordu Üniversitesi - Fatsa Meslek Yüksekokulu
8 Uludağ Üniversitesi - Gemlik Asım Kocabıyık Meslek Yüksekokulu
9 Yakın Doğu Üniversitesi - Denizcilik Meslek Yüksekokulu
10 Yalova Üniversitesi - Yalova Meslek Yüksekokulu
11 Zonguldak Karaelmas Üniversitesi - Alaplı Meslek Yüksekokulu
12 Mustafa Kemal Üniversitesi - Pirinçlik Meslek Yüksekokulu

## MARITIME ANATOLIAN TECHNICAL HIGH SCHOOLS

1.Ceyhan Denizcilik Anadolu Meslek Lisesi
2. Fettah Tamince Denizcilik Anadolu Meslek Lisesi
3. Manavgat Ticaret ve Sanayi Odası Denizcilik Anadolu Meslek Lisesi
4. Kuşadası Denizcilik Anadolu Meslek Lisesi
5. Ayvalık Denizcilik Anadolu Meslek Lisesi
6. Bandırma Denizcilik Anadolu Meslek Lisesi
7. Kurucaşile Denizcilik Anadolu Meslek Lisesi
8. Bartın Denizcilik Anadolu Meslek Lisesi
9. Tatvan Denizcilik Anadolu Meslek Lisesi
10.Gemlik Denizcilik Anadolu Meslek Lisesi
11.Biga Denizcilik Anadolu Meslek Lisesi
12. Armatör Yakup Aksoy Denizcilik Anadolu Meslek Lisesi
13. Çanakkale Denizcilik Anadolu Meslek Lisesi
14. Kaptan Ahmet Fatoğlu Denizcilik Anadolu Meslek Lisesi
15. Espiye Şehit Cengiz Sarıbaş Denizcilik Anadolu Meslek Lisesi
16. Tirebolu Denizcilik Anadolu Meslek Lisesi
17. Sefa Atakaş Denizcilik Anadolu Meslek Lisesi
18. Ziya Kalkavan Denizcilik Anadolu Meslek Lisesi
19. Barbaros Hayrettin Paşa Denizcilik Anadolu Meslek Lisesi
20. Pendik Denizcilik Anadolu Meslek Lisesi
21. Piri Reis Denizcilik Anadolu Meslek Lisesi
22. Hacı Rahime Ulusoy Denizcilik Anadolu Meslek Lisesi
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***MARITIME SECTOR REPORT 2010 has been prepared by the Turkish Chamber of Shipping in accordance with the related laws. We kindly request you to present your suggestions to our Chamber, concerning with the subjects to be reviewed in more details in the Reports of years to come.***

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**Turkish Chamber of Shipping**

**Publication No : 87**
**ISBN : 978-605-137-089-7**

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