

2012
MARITIME SECTOR REPORT

İSTANBUL 2013

İstanbul & Marmara, Aegean, Mediterranean, Black Sea Regions

TURKISH CHAMBER OF SHIPPING

TURKISH CHAMBER OF SHIPPING

İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

MARITIME SECTOR REPORT
2012

İ S T A N B U L – 2013

FOREWORD

The "TURKISH SHIPPING SECTOR REPORT 2012" 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 31.12.2012 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 2012. 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 2012 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

CONTENTS

FOREWORD

CONTENTS

TABLES AND GRAPHS

TURKISH CHAMBER OF SHIPPING

CHAPTER I

THE DEVELOPMENT OF THE TURKISH SHIPPING

- A Close Investigation of the Turkish Merchant Fleet
- The Examination of the Turkish Merchant Fleet By Number and Tonnage
- The Age Profile of Turkish Merchant Fleet
- Turkish Merchant Fleet by Number and Tonnage 1000 DWT and Over
- The Position of Turkish Merchant Fleet within the World Fleet
- The Position of Turkish Merchant Fleet Among the Fleets of the Neighboring Countries
- Port State Control Applications

CHAPTER II

DEVELOPMENT OF TONNAGE CARRIED BY TURKISH MERCHANT FLEET IN 2012

- The Developments in the Transportation of Foreign Trade Cargoes
- Developments in the Transportation of Seaborn Trade
- The Number of Incoming Ships to the Turkish Ports
- Cabotage Transportation
- Developments in International Sea Transportation
- Developments in the Foreign Trade Transportation by Types of Cargoes
- The Progress In Seaborne Trade by Country Groups
- World Container Fleet by Country of Domicile
- Vehicle Transportation through Ro-Ro Lines

CHAPTER III

SHIPBUILDING INDUSTRY

- General Outlook of Turkish Shipbuilding Industry
- Yacht and Boat Building Industry
- Sub- Industry

CHAPTER IV

PORT DEVELOPMENTS

- Inprovements in World Economy
- Ports Information in General

- TDI Ports & Privatizations
- TCDD Ports & Privatizations
- Privatized TCDD Ports
- Private Ports' List and Geographical Distribution of Main Ports in Turkey

CHAPTER V

THE TURKISH STRAITS AND MARITIME TRAFIC SYSTEMS

Activities Made for Controlling the Maritime Traffic in Turkey

- Automatic Identification System (AIS)
- OTS Class-B CS
- (Long Range Identification and Tracking – LRIT) System
- Main Search and Rescue Coordination Center (AAKKM)
- Meosar System

CHAPTER VI

MARINE TOURISM

- Yacht Tourism
- Blue Voyage
- Statistics of the Yachts & Capacity of the Registered Yachting Facilities
- Cruise Tourism in Turkey
- Blue Flag Campaign
- Underwater Divings
- Equipped Diving Rules

CHAPTER VII

TURKISH FISHING SECTOR

- Fishing Fleet and Catching Water Products
- Water Production Facilities
- Foreign Trade in Water Products
  - Exports
  - Imports
- Water Products Processing Industry

CHAPTER VIII

Maritime Training

TABLES

TABLE (1) : The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to Import and Build (1000 GRT and over) 31.12.2012
TABLE (2) : The General Examination of the Turkish Merchant Fleet by National and International Registrise (1000 GRT and over) 31.12.2012
TABLE (3) : The Average Age Profile of the Turkish Merchant Fleet (1000 GRT and over)
TABLE (4) : Turkish Merhant Fleet Distribution by Tonnage and Age Groups (Dwt)-(1000 GRT and over)
TABLE (5) : Dry Cargo Ships by Tonnage and Age Groups (Dwt)-(1000 GRT and over)
TABLE (6) : Bulk Carrier Ships by Tonnage and Age Groups (Dwt)-(1000 and over)
TABLE (7) : Oil Tankers by Tonnage and Age Groups (Dwt)-(1000 and over)
TABLE (8) : Chemical Tankers by Tonnage and Age Groups (Dwt)-(1000 and over)
TABLE (9) : Container Ships by Tonnage and Age Groups (Dwt)-(1000 and over)
TABLE (10) : Ro-Ro Ships by Tonnage and Age Groups (Dwt)-(1000 and over)
TABLE (11) : Ro-Ro Ships by Tonnage and Age Groups (Dwt)-(1000 and over)
TABLE (12) : The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to Import and Built (1000 DWT and over) 31.12.2012
TABLE (13) : The General Examination of the Turkish Merchant Fleet Import and Domestic Build, According to Registries (1000 DWT and over) 31.12.2012
TABLE (14) : The General Examination of the Turkish Merchant Fleet by National and International Registrise (1000 DWT and over) 31.12.2012
TABLE 15: The General Examination of the Turkish Merchant Fleet Imported and Domestic Built, According to Registries(1000 DWT and over)
TABLE 16: Turkish ships Under the National Flag and Foreign Flags
TABLE 17: Total Fleet of the 30 Countries by National and Foreign Flag
TABLE 18: World Merchant Fleet Ranking by Flags as of January 1 st 2013
TABLE 19: Turkish Merchant Fleet and the Neighboring Countries 01.01.2013
TABLE 20: Foreign Trade Transportation by Modes (%)
TABLE 21: Foreign Trade Transportation by Modes ($)
TABLE 22: The Number of incoming Ships to the Turkish Ports
TABLE 23: Number of incoming Ships to the Turkish Ports in 2011.
TABLE 24: 2003-2011 Cabotage Transportation
TABLE 25: 2011 Cabotage Transportation by The Types of Cargoes
TABLE 26: 2011 Cabotage Transportation in Ports
TABLE27: 2003-2011 Cabotage Transportation Vehicle Numbers
TABLE 28: 2003-2011 Cabotage Transportation Passenger Numbers
TABLE 29: Development of the Seaborn Trade (2002-2011) tons
TABLE 30: Foreign Trade Transportation by Flags
TABLE 31: By Types Cargo Handling Export and Transit
TABLE 32: Import by the Types of Cargoes 2012
TABLE 33: Seaborne Trade to OECD Countries (2012) Export
TABLE 34: Seaborne Trade to OECD Countries (2012) Import
TABLE 35: Seaborne Trade to EU Countries (mTon)(2012)

TABLE 36: Seaborne Trade to EU Countries (mTon) (2012)
TABLE 37: Seaborne Trade to BSEC Countries (mTons) (2012) Export
TABLE 38: Seaborne Trade to BSEC Contries (mTons) (2012) Import
TABLE 39: World Container Fleet By Country of Domicile (1000 GRT and Over)
TABLE 40: Container Handling 2003-2012 (TEU)
TABLE 41: Position at the 18 Ports Loading Container Handling (TEU) 2012
TABLE 42: Position at the 8 Ports Unloading Container Handling (TEU) 2012
TABLE 43: Position at the20 Country Container ForeignTrade Handling 2012
TABLE 44: Ro-Ro Lines Transported Vehicles (2006- 2012)
TABLE 45: Shipyards Under Operation 2012
TABLE 46: Shipyards Distribution According to Cities
TABLE 47: Orderbook of Turkish Shipyards as of May 2013
TABLE 48: Cargo Handling Figures at Turkish Ports (Acc. to Transport Mode)
TABLE 49: Container Handling Figures at Turkish Ports
TABLE 50: Handling Figures of Turklim Member Ports, TCDD Ports and Others
TABLE 51: The Ports Operated by Turkish Maritime Administrations (TDI)
TABLE 52: Specifications and Capacities of TCDD Ports
TABLE 53: TCDD Ports 2007 – 2012 Handling Figures Acc. to Cargo Groups
TABLE 54: TCDD Ports Loading and Unloading Figures
TABLE 55: Handling Figures of Mersin International Port (2012)
TABLE 56: Ships Passing Through the Turkish Straits
TABLE 57: Statistics of Ships Passing Through İstanbul Strait
TABLE 58: Statistics of Ships Passing Through Çanakkale Strait
TABLE 59: The Ships Carried Dangerous Cargoes – İstanbul Strait
TABLE 60: The Ships Carried Dangerous Cargoes – Çanakkale Strait
TABLE 61: Marine Tourism Facility with Tourism Administration Certificate (2011)
TABLE 62: Number of Transit Passengers Coming by Cruise Ships (2003-2010)
TABLE 63: Number of International Year of the Blue Flag in 2010
TABLE 64: Production of Fisheries Exports, Imports and Consumption (1996-2010)
TABLE 65: Quantity and Volume of Sea Resources (2006-2010)
TABLE 66: By Nature of Fishing Vessels (2006-2010)

GRAPHS

GRAPH 1: Examination of Registeries (GRT)
GRAPH 2: Turkish Merchant Fleet Distribution by Age Groups
GRAPH 3: The Average Age of Dry Cargo Segment DWT%
GRAPH 4: The Average Age of Bulk Carriers DWT%
GRAPH 5: The Average Age of Oil Tankers DWT%
GRAPH 6: The Average Age of Chemical Tankers DWT%
GRAPH 7: The Average Age of Container ships DWT%
GRAPH 8: The Average Age of Ro-Ro Ships DWT%
GRAPH 9: The Average Age of Ro-Ro Ships GRT %
GRAPH10: Turkish Fleet According to Registries (1000 DWT and over)
GRAPH11: Progress of the Turkish Merchant Fleet
GRAPH12: By Country of Domicile as of 1 January 2013
GRAPH13: World Merchant Fleet Ranking by Flag as of January 1st , 2013

GRAPH14 : Turkish Merchant Fleet and the Neighboring Countries (01.01.2013) (300 Grt and over)
GRAPH 15 : Inspected and Detained Ships by Years
GRAPH 16: Monthly Detention Rates in Tokyo,Mediterranean,Black Sea and Paris Mou's in Years 2010 and 2011
GRAPH 17: Foreign Trade Transportation by Modes (%)
GRAPH 18:The Number of Incoming Ships to the Turkish Ports
GRAPH 19: Annual Turkish / Foreign Flag Rates
GRAPH 20: 2003-2012 Cabotage Transportation
GRAPH 21: 2012 Cabotage Transportation by the Types of Cargoes
GRAPH 22: 2003-2012 Cabotage Transportation Vehicle Numbers
GRAPH 23: 2003-2011 Cabotage Transportation Passenger Numbers
GRAPH 24: Development of the Seaborne Trade (Tons)
GRAPH 25: Turkish/Foreign Flag Shares (Tons)
GRAPH 26: Turkish /Foreign Flag Shares (Export-Import)
GRAPH 27: Export and Transit Loading by the Types of Cargoes
GRAPH 28: Import and Transit Loading by the Types of Cargoes
GRAPH 29: Seaborne Trade to OECD Countries (2012)
GRAPH 30: Seaborne Trade to EU Countries 2012
GRAPH 31: Seaborne Trade to Transit Loading-Unloading to BSEC Countries
GRAPH 32: Seaborne Trade to BSEC Countries Foreign Trade
GRAPH 33: 2003-2012 Container Handling (TEU)
GRAPH 34: Position at the 8 Ports Container Handling (TEU) 2012
GRAPH 35: Ro-Ro Lines Transported Vehicles (2003- 2011)
GRAPH 36: Ro-Ro Lines Transported Vehicles (2012)
GRAPH 37: 2002 / 2011 Shipyards Under Operation
GRAPH 38: Number of Ships Delivered Between 2002-2012
GRAPH 39: DWT of Ships Delivered Between 2002-2012
GRAPH 40: Employee Numbers In Turkish Shipyards by 2011
GRAPH 41: Export Figures of Turkish Shipbuilding Industry 2009-2012
GRAPH 42: Shipyards Project Capacities between 2002-2012
GRAPH 43: Orderbook by Builder Country (Quantity)
GRAPH 44: Orderbook by Builder Country (Tonnage)
GRAPH 45: Tanker Orders by Builder Country
GRAPH 46: Orderbooks by Owner Country
GRAPH 47: Distribution of Orders According to Shiptype
GRAPH 48: Superyachts Build by Country, Total Length 2010
GRAPH 49: Number of Yachts Between 30-40 m. Built in Europan Countries
GRAPH 50: Shipbuilding Sub-Industry Employment
GRAPH 51: Cargo Handling Figures in Years
GRAPH 52: Container Handling Figures according to Years
GRAPH 53: Container Handling Ports in Turkey
GRAPH 54: TCDD Ports 2007 – 2012 Handling Figures
GRAPH 55: 2012 TCDD Ports Handling Acc. to Cargo Groups
GRAPH 56: TCDD Ports Handling Acc. to Years (Tonnes)
GRAPH 57: 2012 TCDD Ports Cargo Handling Acc. To Transportation Modes
GRAPH 58: Mersin Port 2012 Loading
GRAPH 59: Mersin Port 2012 Unloading
GRAPH 60: MIP Handling Figures Acc. To Years (Tonnes)
GRAPH 61: Geographical Distribution of Main Ports in Turkey

GRAPH 62: Statistics of Cruises and Passengers Arrived at Turkish Port Between2006-2012
GRAPH 63: Number of Turkish Beaches, Marinas and Yaches with Blue Flags by Years
GRAPH 65: Distriubution of Fisheries Production Volume (2010)
GRAPH 66: Fishing Vessels According to Years
GRAPH 67: Exports of Water Productions (1999-2010)
GRAPH 68: Imports of Water Products (1999-2010)

TURKISH CHAMBER OF SHIPPING

İstanbul & Marmara, Aegean, The Mediterranean, Black Sea Regions Chamber of Shipping, briefly called 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 Ereğli. Turkish Chamber of Shipping which has 16 Representations in Turkey 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 regions of the Sea of Marmara, the Aegean Sea coast,the Mediterranean coast and finally the Black Sea coast of Turkey.

ITS AIMS AND ACTIVITIES

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 public interest. Its other major aims are 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 also to keep the discipline, morals and solidarity of the shipping profession.

The major activities of the Turkish Chamber of Shipping 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 the activities of the international organizations concerned with shipping and to perform other functions stated in the law.

ITS MEMBERS

Turkish Chamber of Shipping has more than 8450 Members. In accordance with the 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 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. The Members of The Turkish Chamber of Shipping have been gathered in 47 Professional Committees, according to their fields of occupation.

THE NATIONAL AND INTERNATIONAL ORGANIZATIONS OF WHICH IT IS A MEMBER

(a) National Organizations: The Union of Chambers and Commodity Exchanges of Turkey (TOBB) and International Chamber of Commerce (ICC)-The Turkish National Committee.

(b) International Organizations: 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), The International Association of Independent Tanker Owners (INTERTANKO), The Baltic Exchange, The Yacht Harbour Association Ltd. (TYHA), International Council of Marine Industry Associations (ICOMIA), European Boating Association (EBA), TACCI (Turkish American Chamber of Commerce and Industry).

ITS PUBLICATIONS

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

İZMİR BRANCH
Cumhuriyet Bulvarı Muzaffer Bey İşhanı No: 88
Kat: 1 Pasaport 35210 İZMİR/ TURKEY
Phone: +90 232 489 90 21- 425 72 15
Fax: +90 232 441 87 96
E-Mail: izmirsube@chamber-of-shipping.org.tr

BODRUM BRANCH
Neyzen Tevfik Cad. Danacı Sok. No: 2
Karada Marina Karşısı Bodrum – MUĞLA/TURKEY
Phone: +90 252 316 55 06 - 313 61 87-88
Fax: +90 252 316 78 31
E-Mail: bodrum@chamber-of-shipping.org.tr

ANTALYA BRANCH
Varlık Mah. 176. Sokak Martı Apt. No: 1 D: 6 07050 ANTALYA/ TURKEY
Phone: +90 242) 237 77 26- 237 81 70
Fax: +90 242 237 77 36
E-Mail: antalya@chambe-of-shipping.org.tr

MARMARİS BRANCH
Kordon Cad. Marmaris 48700 MUĞLA/TURKEY
Phone: +90 252) 413 45 61-62
Fax : +90 252 413 45 63
E-Mail: marmaris@chamber-of-shipping.org.tr

İSKENDERUN BRANCH
Çay Mah. Atatürk Bulvarı No: 26 İSKENDERUN/TURKEY
Phone: +90 326) 613 44 69-70- 326 614 50 25
Fax: +90 326 614 50 26
E-Mail: iskenderun@chamber-of-shipping.org.tr

FETHİYE BRANCH
Karagözer Mah. Tepesidelik Yokuşu No: 49
48300 Fethiye MUĞLA/TURKEY
Phone - Fax : +90 252 614 58 11
E-Mail: fethiye@chamber-of-shipping.org.tr

KARADENİZ EREĞLİ AND WEST BLACK SEA BRANCH
Orhanlar Mah. Yalı Cad. No:71 Kat:2
67320 KARADENİZ EREĞLİ/TURKEY
Phone: +90 372 3236495
Fax: +90 3723225529
E-Mail : kdzeregli@chamber-of-shipping.org.tr

TURKISH CHAMBER OF SHIPPING HEADQUARTERS
Meclis-i Mebusan Cad. No:22 Fındıklı 34427 İSTANBUL/TURKEY
Phone: +90 212 252 0130 (8 lines) - 243 54 95 (3 lines) Fax: +90 212 293 79 35
Telex: 24727 dto tr - 25774 dzod tr
Web: www.denizticaretodasi.org E-mail: dto@chamber-of-shipping.org.tr



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 build 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 2012.

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 build in Turkey. Table 1 shows that, Turkish merchant fleet consists of 690 ships. The examination of the table shows that 323 ships (7.8 million DWT) have been acquired by importation and 367 ships (2,2 million DWT) have been built in Turkey.

Distribution of 690 ships by their types ; 36.81 % dry cargo ships, 16.31 % bulk carriers, 11.72 % chemical tankers, 7.8 % containers and 4.34 % oil tankers, 22.98 % other types of ships.

Distribution of the fleet by DWT (9.9 Million) ; 51.19 % bulk carriers, 14.07 % dry cargo ships, 13.61 % oil tankers, 8,29 % containers and 12.84 % other types of ships.

By DWT,7.6 % of our fleet is registered in National Ship Registry, 92.4 % of fleet is registered in International Ship Registry. By GRT, 11.3 % of our fleet is registered in National Ship Registry, 88.7 % of the fleet is registered in International Ship Registry.(Table 2)

The fleet registered in National Ship Registry (759.575 Dwt) is composed of bulk carriers (54.7 %), container ships (24.4 %), dry cargo vessels (8.5 %), chemical tankers (3.6 %), oil tankers (5.2 %) and other types of ships (3.8 %). (Table 2)

TABLE (1) The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to Import and Build (1000 GRT and over) 31.12.2012												
SHIP TYPES	**COUNT**				**DWT**				**GRT**			
	IMPORT	**BUILT**	**TOTAL**	**%**	**IMPORT**	**BUILT**	**TOTAL**	**%**	**IMPORT**	**BUILT**	**TOTAL**	**%**
DRY CARGO	65	189	254	36,81	551.059	854.313	1.405.372	14,07	370.745	539.808	910.553	13,19
BULK CARRIER	99	14	113	16,35	4.675.054	438.358	5.113.412	51,19	2.626.793	264.201	2.890.994	41,89
CONTAINERS	30	24	54	7,81	546.219	281.909	828.128	8,29	438.949	219.959	658.908	9,54
DRY CARGO/CONTAINERS	4	16	20	2,89	16.630	127.720	144.350	1,45	11.745	89.120	100.865	1,46
OIL TANKERS	17	13	30	4,34	1.296.952	62.320	1.359.272	13,61	696.649	39.266	735.915	10,66
CHEMICAL TANKERS	28	53	81	11,72	377.609	354.085	731.694	7,33	232.335	238.694	471.029	6,82
LPG TANKERS	7	0	7	1,01	35.029	0	35.029	0,35	32.751	0	32.751	0,47
ASPHALT TANKERS	1	0	1	0,14	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	24	2	26	3,76	216.580	21.117	237.697	2,38	472.968	58.008	530.976	7,69
RO-RO/PASSERGER	10	5	15	2,17	24.000	5.789	29.789	0,3	56.702	9.307	66.009	0,96
FERRY BOATS	8	2	10	1,45	4.067	2.765	6.832	0,07	39.943	3.029	42.972	0,62
TRAIN FERRIES	0	7	7	1,01	0	6.668	6.668	0,07	0	11.266	11.266	0,16
TRAIN FERRIES/RO-RO	1	0	1	0,14	6.266	0	6.266	0,06	15.195	0	15.195	0,22
PASSENGER AND CARGO SHIPS	5	6	11	1,59	10.495	5.047	15.542	0,16	39.746	20.892	60.638	0,88
FISHING BOOT	1	0	1	0,14	568	0	568	0,01	1.407	0	1.407	0,02
HARBOUR FERRIES	1	0	1	0,14	0	0	0	0	1.042	0	1.042	0,02
HARBOUR CAR FERRIES	1	26	27	3,91	338	23.648	23.986	0,24	1.013	32.572	33.585	0,49
TUGS	1	2	3	0,43	1.394	1.049	2.443	0,02	1.565	4.088	5.653	0,08
SERVICE SHIPS	0	1	1	0,29	16.897	0	16.897	0,17	41.521		41.521	0,65
BARGE/FLOATING POSTOON	2	0	2	0,29	19.774	0	19.774	0,2	19.608	0	19.608	0,28
FLOATING CRANE	17	7	24	3,47	0	0	0	0	237.750	27.039	264.789	3,84
OTHERS	1	0	1	0,14	0	0	0	0	2.153	0	2.153	0,03
TOTAL	**323**	**367**	**690**	**100**	**7.801.701**	**2.184.788**	**9.986.489**	**100**	**5.342.480**	**1.557.249**	**6.899.729**	**100**

Source : Turkish Chamber of Shipping -2012

TABLE (2) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 GRT and over) 31.12.2012												
SHIP TYPES	**COUNT**				**DWT**				**GRT**			
	National Reg.	**Inter. Reg.**	**Total**	**%**	**National Reg.**	**Inter. Reg.**	**Total**	**%**	**National Reg.**	**Inter. Reg.**	**Total**	**%**
DRY CARGO	19	235	254	36,81	64.610	1.340.762	1.405.372	14,07	42.103	868.450	910.553	13,19
BULK CARRIER	11	102	113	16,35	415.831	4.697.581	5.113.412	51,19	240.478	2.650.516	2.890.994	41,89
CONTAINERS	9	45	54	7,81	185.205	642.923	828.128	8,29	145.941	512.967	658.908	9,54
DRY CARGO/CONTAINERS	1	19	20	2,89	2.356	141.994	144.350	1,45	1.720	99.145	100.865	1,46
OIL TANKERS	5	25	30	4,34	39.937	1.319.335	1.359.272	13,61	25.461	710.454	735.915	10,66
CHEMICAL TANKERS	6	75	81	11,72	27.911	703.783	731.694	7,33	19.040	451.989	471.029	6,82
LPG TANKERS	0	7	7	1,01	0	35.029	35.029	0,35	0	32.751	32.751	0,47
ASPHALT TANKERS	1	0	1	0,14	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	0	26	26	3,76	0	237.697	237.697	2,38	0	530.976	530.976	7,69
RO-RO/PASSERGER	0	15	15	2,17	0	29.789	29.789	0,3	0	66.009	66.009	0,96
FERRY BOATS	0	10	10	1,45	0	6.832	6.832	0,07	0	42.972	42.972	0,62
TRAIN FERRIES	7	0	7	1,01	6.668	0	6.668	0,07	11.266	0	11.266	0,16
TRAIN FERRIES/RO-RO	0	1	1	0,14	0	6.266	6.266	0,06	0	15.195	15.195	0,22
PASSENGER AND CARGO SHIPS	5	6	11	1,59	9.800	5.742	15.542	0,16	36.077	24.561	60.638	0,88
FISHING BOOT	0	1	1	0,14	0	568	568	0,01	0	1.407	1.407	0,02
HARBOUR FERRIES	0	1	1	0,14	0	0	0	0	0	1.042	1.042	0,02
HARBOUR CAR FERRIES	3	24	27	3,91	3.093	20.893	23.986	0,24	3.686	29.899	33.585	0,49
TUGS	1	2	3	0,43	1.394	1.049	2.443	0,02	1.565	4.088	5.653	0,08
SERVICE SHIPS	0	1	1	0,29	0	16.897	16.897	0,17	0	41.521	41.521	0,65
BARGE/FLOATING POSTOON	0	2	2	0,29	0	19.774	19.774	0,2	0	19.608	19.608	0,28
FLOATING CRANE	23	1	24	3,47	0	0	0	0	247.244	17.544	264.788	3,84
OTHERS	0	1	1	0,14	0	0	0	0	0	2.153	2.153	0,03
TOTAL	**91**	**599**	**690**	**100**	**759.575**	**9.226.914**	**9.986.489**	**100**	**776.481**	**6.123.247**	**6.899.729**	**100**

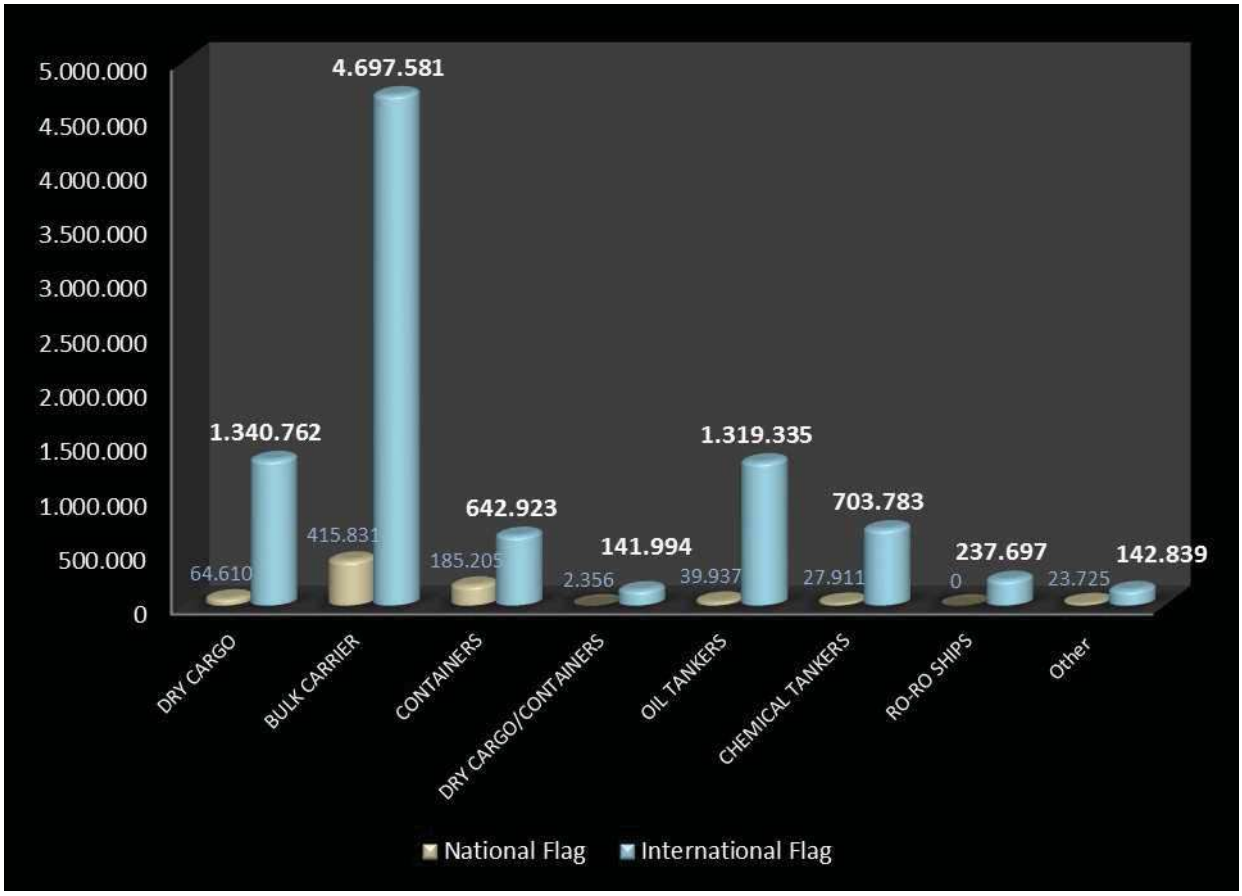
Source : Turkish Chamber of Shipping -2012

Table 2 shows Turkish merchant fleet which consists of 690 ships. 13.2 % of total fleet (91 ships) registered in National Ship Registry and 86.8 % of total fleet (599 ships) registered in International Ship Registry.

The majority of the fleet registered in International Ship Registry (9.2 million DWT) is composed of bulk carriers (47 %), dry cargo ships (14.5 %), oil tankers (14.3 %), chemical tankers (7.6 %), container (7,0 %) and other types of ships (9.6 %).

The majority of the fleet registered in National Ship Registry (776.481 DWT) is composed of bulk carriers (31 %), containers (18.8 %) and dry cargo ships (5.4 %) .

GRAPH (1) : Examination of Registries (GRT)
(1000 Grt and Over)



The Age Profile of Turkish Merchant Fleet

Table 3 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 690 ships. The average age of these ships is 26.5 as of 31.12.2012.

The average age of dry cargo ships is 24 which consists of 14 % of the fleet. The average age of bulk carriers is 14 which consists of 51.2 % of the fleet. The average age of container is 11 and chemical tankers is 11 which consists of 15.6 % of the general fleet. The average age of oil tankers are 18 which consists of 13.6 % of the fleet.

TABLE (3) : The Average Age Profile of the Turkish Merchant Fleet (1000 GRT and Over)

SHIP TYPES	NUMBER	TONNAGE (DWT)	TONNAGE (GRT)	AVE. AGE
DRY CARGO	254	1.405.372	910.553	24
BULK CARRIER	113	5.113.412	2.890.994	14
CONTAINERS	54	828.128	658.908	11
DRY CARGO/CONTAINERS	20	144.350	100.865	12
OIL TANKERS	30	1.359.272	735.915	18
CHEMICAL TANKERS	81	731.694	471.029	11
LPG TANKERS	7	35.029	32.751	20
ASPHALT TANKERS	1	2.770	1.900	32
RO-RO SHIPS	26	237.697	530.976	19
RO-RO/PASSERGER	15	29.789	66.009	22
FERRY BOATS	10	6.832	42.972	14
TRAIN FERRIES	7	6.668	11.266	41
TRAIN FERRIES/RO-RO	1	6.266	15.195	34
PASSENGER AND CARGO SHIPS	11	15.542	60.638	25
FISHING BOOT	1	568	1.407	39
HARBOUR FERRIES	1	0	1.042	61
HARBOUR CAR FERRIES	27	23.986	33.586	24
TUGS	3	2.443	5.653	22
SERVICE SHIPS	1	16.897	41.521	19
BARGE/FLOATING POSTOON	2	19.774	19.608	14
FLOATING CRANE	24	0	264.788	39
OTHERS	1	0	2.153	68
Total	**690**	**9.986.489**	**6.899.729**	**26,5**

Source : Turkish Chamber of Shipping - 2012

Table 4 shows Turkish Merchant Fleet by age and tonnage ranges. Turkish Merchant Fleet consists of 690 ships of 9.986.489 DWT.

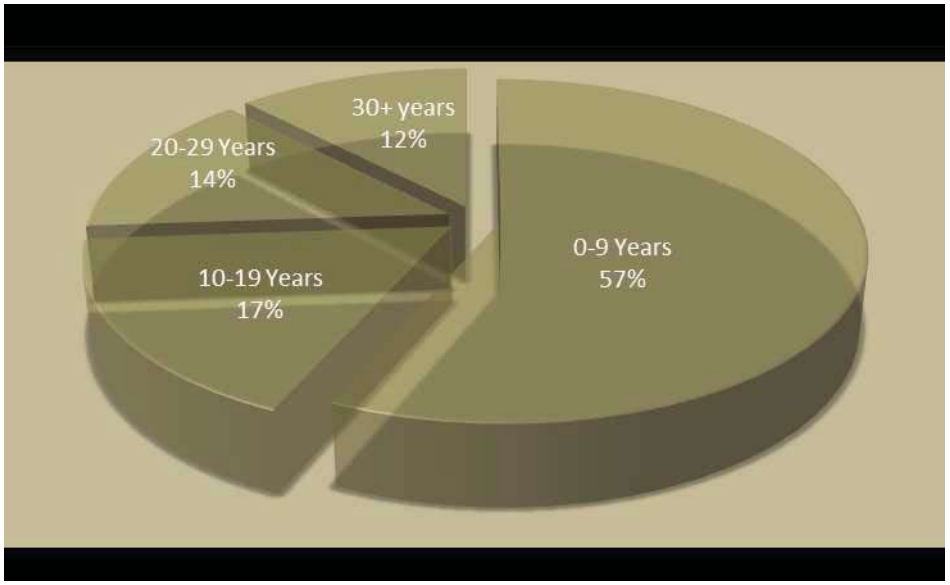
- 245 ships of 5.654.368 Dwt are between 0-9 age range,
- 101 ships of 1.723.341 Dwt are between 10-19 age range,
- 141 ships of 1.387.868 Dwt are between 20-29 age range,
- 203 ships of 1.220.912 Dwt are between 30 and over age range.

Graph shows age groups of the fleet. 57 % of the fleet are between 0-9 age range, 17 % of the fleet are between 10-19 age range, 14 % of the fleet are between 20-29 age range and 12 % are 30 years and over.

DIVISIONS OF TONNAGE	TABLE (4) : 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	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	14	9.779	28,89	11	5.037	14,88	13	7.560	22,33	18	11.475	33,90	56	33.851
1500-5999	79	321.494	30,27	37	133.185	12,54	66	238.891	22,49	125	368.637	34,70	307	1.062.207
6000-9999	33	239.767	32,40	18	139.784	18,89	30	215.531	29,13	22	144.931	19,58	103	740.013
10000-34999	70	1.276.470	49,73	17	352.681	13,74	21	436.044	16,99	33	501.578	19,54	141	2.566.773
35000-52999	8	376.552	27,68	13	633.423	46,56	9	350.339	25,75	2	0	19,54	32	1.360.314
53000-79999	27	1.645.439	72,37	4	294.372	12,95	2	139.503	6,14	3	194.291	8,55	36	2.273.605
80000-119999	6	515.059	100,00	0	0	12,95	0	0	6,14	0	0	8,55	6	515.059
120000+	8	1.269.807	88,51	1	164.859	11,49	0	0	6,14	0	0	8,55	9	1.434.666
Total	245	**5.654.368**	**56,62**	101	**1.723.341**	**17,26**	141	**1.387.868**	**13,90**	203	**1.220.912**	**12,23**	690	**9.986.489**

Source : Turkish Chamber of Shipping - 2012

GRAPH (2) : 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 5 shows the Dry Cargo segment (254 ships) which is 1.405.372 DWT.

- 51 ships of 290.041 DWT are between 0-9 age range,
- 27 ships of 167.951 DWT are between 10-19 age range,
- 74 ships of 496.858 DWT are between 20-29 age range,
- 102 ships of 450.522 DWT are between 30 and over age range.

TABLE (5) : Dry Cargo Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

DIVISIONS OF TONNAGE	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total		
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%
150-1499	0	0	0,00	0	0	0,00	0	0	0,00	1	1.162	0,26	1	1.162	0,08
1500-5999	37	160.439	55,32	19	63.039	37,53	46	168.915	34,00	83	268.664	59,63	185	661.057	47,04
6000-9999	9	61.013	21,04	7	55.047	32,78	22	163.342	32,87	11	77.330	17,16	49	356.732	25,38
10000-34999	5	68.589	23,65	0	0	0,00	5	117.775	23,70	7	103.366	22,94	17	289.730	20,62
35000-52999	0	0	0,00	1	49.865	29,69	1	46.826	9,42	0	0	0,00	2	96.691	6,88
53000-79999	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00
80000-119999	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00
120000+	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00
Genel Toplam :	**51**	**290.041**	**100,00**	**27**	**167.951**	**100,00**	**74**	**496.858**	**100,00**	**102**	**450.522**	**100,00**	**254**	**1.405.372**	**100,00**

Source : Turkish Chamber of Shipping - 2012

21 % of Dry Cargo Ships are between 0-9 age range, 12 % are between 10-19 age range, 35 % are between 20-29 age range, 32 % are 30 years and over.

GRAPH (3) : Average Age of Dry Cargo Segment DWT %

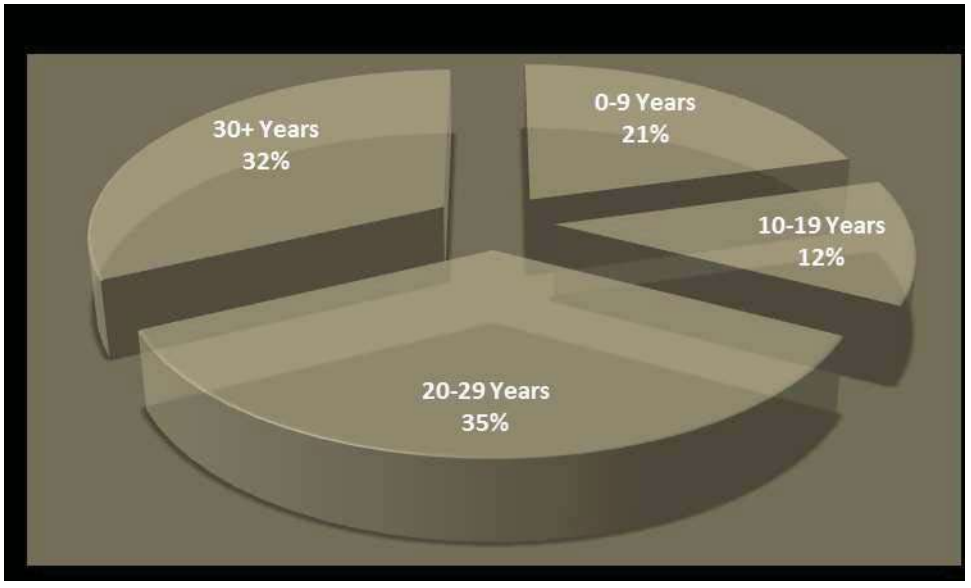


Table 6 shows the bulk carrier segment (113 ships) which is 5.113.412 DWT.

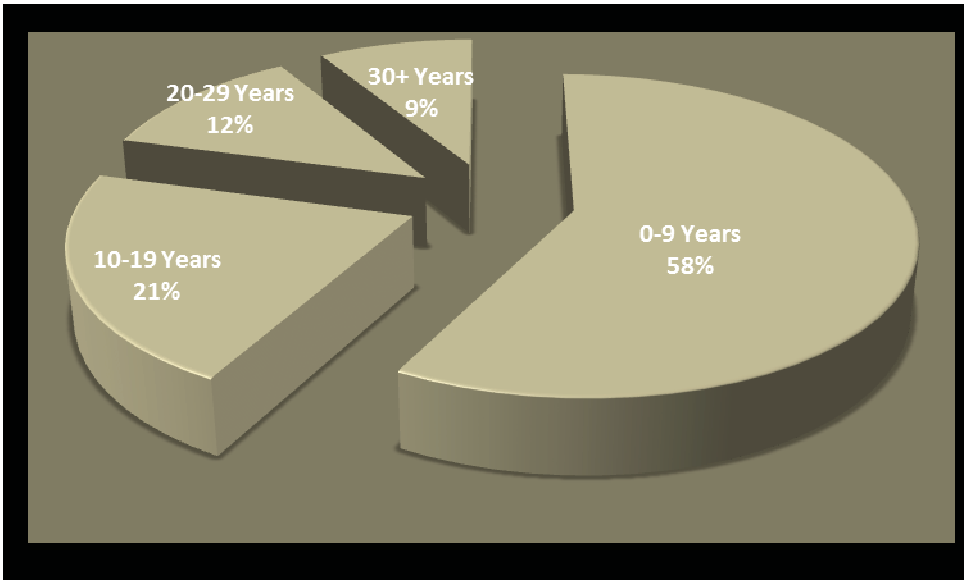
- 54 ships of 2.964.198 Dwt are between 0-9 age range,
- 25 ships of 1.090.724 Dwt are between 10-19 age range,
- 16 ships of 611.389 Dwt are between 20-29 age range,
- 18 ships of 447.101 Dwt are between 30 and over age range.

TABLE (6) : Bulk Carrier Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

DIVISIONS OF TONNAGE	0-9 Years		%	10-19 Years		%	20-29 Years		%	30 + Years		%	Toplam		
	No.	DWT		No.	DWT		No.	DWT		No.	DWT		No.	DWT	%
150-1499	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00	0	0	0,00
1500 - 7500	1	4.342	0,15	0	0	0,00	0	0	0,00	0	0	0,00	1	4.342	0,08
7501 - 9999	2	13.201	0,45	0	0	0,00	0	0	0,00	0	0	0,00	2	13.201	0,26
10000 - 34999 (HandySize)	14	363.705	12,27	9	212.794	19,51	6	168.373	27,54	16	328.281	73,42	45	1.073.153	20,99
35000 - 52999(HandyMax)	2	84.023	2,83	12	583.558	53,50	8	303.513	49,64	0	0	0,00	22	971.094	18,99
53000 - 79999 (Panamax)	27	1.645.439	55,51	4	294.372	26,99	2	139.503	22,82	2	118.820	26,58	35	2.198.134	42,99
80000 - 119999 (CapeSize)	6	515.059	17,38	0	0	0,00	0	0	0,00	0	0	0,00	6	515.059	10,07
120000+ (Large Size)	2	338.428	11,42	0	0	0,00	0	0	0,00	0	0	0,00	2	338.428	6,62
Total	**54**	**2.964.198**	**100**	**25**	**1.090.724**	**100**	**16**	**611.389**	**100**	**18**	**447.101**	**100**	**113**	**5.113.412**	**100**

Source : Turkish Chamber of Shipping – 2012İ

GRAPH (4) : Average Age of Bulk Carriers DWT %



58 % of the bulk carriers are 0-9 age range, 21 % are 10-19 age range, 12 % are 20-29 age range and 9 % are 30 age and over.

Tablo 7 shows oil tankers segment (30) which is 1.359.272 DWT

- 13 ships of 1.009.966 DWT are 0-9 age range,
- 5 ships of 179.669 DWT are 10-19 age range,
- 5 ships of 146.716 DWT are 20-29 age range,
- 7 ships of 22.921 DWT are 30 age and over.

TABLE (7) : Oil Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

DIVISIONS OF TONNAGE	0-9 Years		%	10-19 Years		%	20-29 Years		%	30 + Years		%	Total		%
	No	DWT		No	DWT		No	DWT		No	DWT		No	DWT	
150 - 1499	0	0	0	0	0	0	0	0	0	1	1.193	5	1	1.193	0
1500 - 5999	4	16.471	2	4	14.810	8	0	0	0	5	15.467	67	13	46.748	3
6000 - 19999	2	22.005	2	0	0	0	2	12.637	9	1	6.261	27	5	40.903	3
20000 - 49999 (Product Tanker)	1	40.111	4	0	0	0	2	58.608	40	0	0	0	3	98.719	7
50000 - 79999 (Panamax)	0	0	0	0	0	0	1	75.471	51	0	0	0	1	75.471	6
80000 - 109999 (Aframax)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
110000 - 164999 (Suezmax)	6	931.379	92	1	164.859	92	0	0	0	0	0	0	7	1.096.238	81
165000 - 299999 (VLCC)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
300000 + (ULCC)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	**13**	**1.009.966**	**100**	**5**	**179.669**	**100**	**5**	**146.716**	**100**	**7**	**22.921**	**100**	**30**	**1.359.272**	**100**

Source : Turkish Chamber of Shipping - 2012

74 % of the oil tankers are 0-9 age range, 13 % are 10-19 age range, 11 % are 20-29 age range and 2 % are 30 age and over.

GRAPH (5) : Average Age of Oil Tankers
DWT %

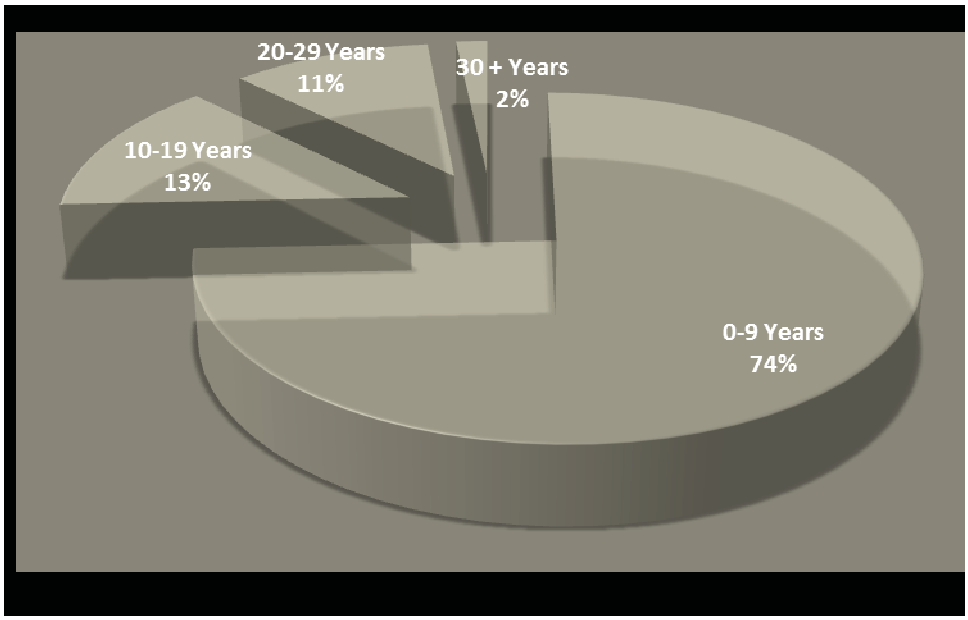


Table 8 shows the average age of the chemical tankers (81 ships) which are 731.694 DWT.

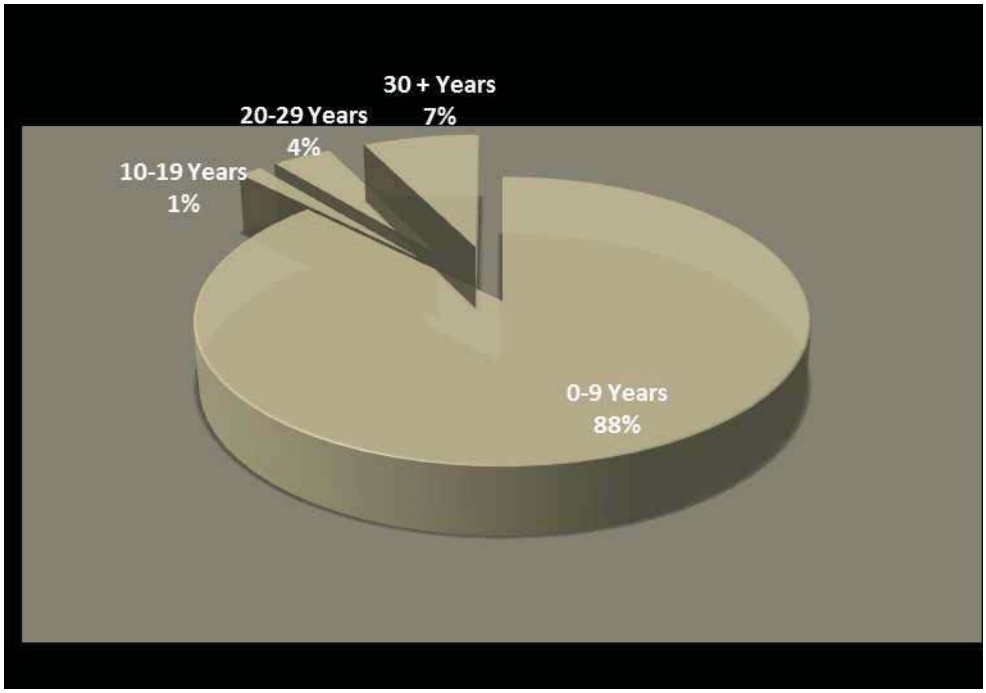
- 61 ships of 641.073 Dwt are 0-9 age range,
- 3 ships of 10.390 Dwt are 10-19 age range,
- 6 ships of 27.085 Dwt are 20-29 age range,
- 11 ships of 53.145 Dwt are 30 age and over.

TABLE (8) : Chemical Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

DIVISIONS OF TONNAGE	0-9 Years			10-19 Years			20-29 Years			30 + Years			Total		
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%
150 - 1499	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1500 - 5999	30	117.880	18	3	10.390	100	5	20.902	77	8	27.352	51	46	176.524	24
6000 - 19999	25	250.775	39	0	0	0	1	6.184	23	3	25.793	49	29	282.752	39
20000 - 49999 (Product Tanker)	1	20.000	3	0	0	0	0	0	0	0	0	0	1	20.000	3
50000 - 79999 (Panamax)	5	252.418	39	0	0	0	0	0	0	0	0	0	5	252.418	34
80000 - 109999 (Aframax)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
110000 - 164999 (Suezmax)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
165000 - 299999 (VLCC)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
300000 + (ULCc)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Toplam	61	641.073	100	3	10.390	100	6	27.086	100	11	53.145	100	81	731.694	100

Source :Turkish Chamber of Shipping - 2012

GRAPH (6) : Average age of Chemical Tankers
DWT %



88 % of other type of tankers are 0-9 age range, 1 % are 10-19 age range, 4 % are 20-29 age range and 7 % are 30 age and over.

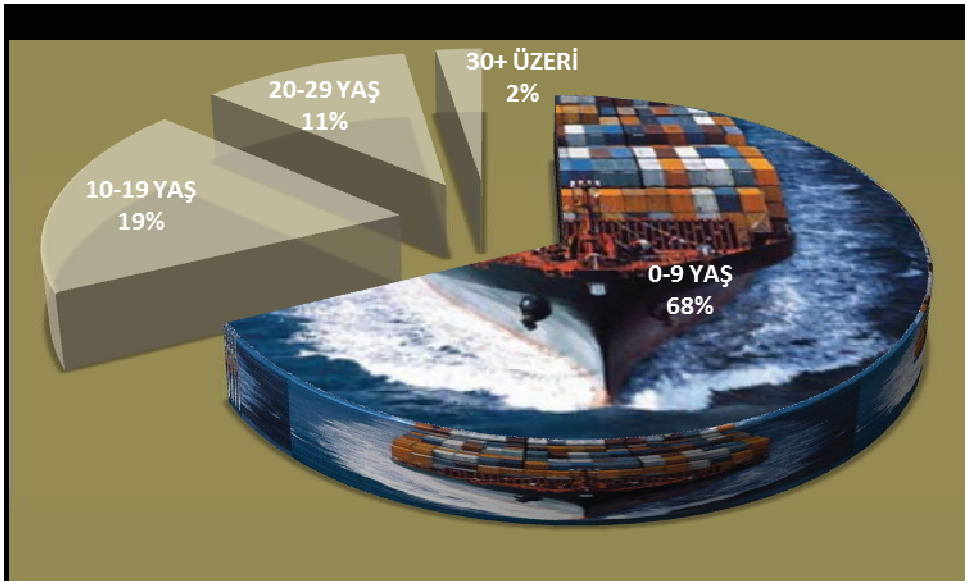
Table 9 shows the average age of the Container ships (54 ships) which are 828.128 DWT.

- 30 ships of 559.860 Dwt are 0-9 age range,
- 13 ships of 154.586 Dwt are 10-19 age range,
- 9 ships of 92.961 Dwt are 20-29 age range,
- 2 ships of 20.721 Dwt are 30 age and over.

TABLE (9) : Container Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)															
DIVISIONS OF TONNAGE	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total		
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%
150-1499	1	1.200	0	0	0	0	0	0	0	0	0	0	1	1.200	0
1500-5999	2	8.860	2	3	12.990	8	1	4.487	5	0	0	0	6	26.337	3
6000-9999	2	13.428	2	3	20.564	13	3	25.118	27	1	6.550	32	9	65.660	8
10000-34999	25	536.372	96	7	121.032	78	5	63.356	68	1	14.171	68	38	734.931	89
35000-52999	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
53000-79999	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
80000-119999	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
120000+	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	**30**	**559.860**	**100**	**13**	**154.586**	**100**	**9**	**92.961**	**100**	**2**	**20.721**	**100**	**54**	**828.128**	**100**

Source : Turkish Chamber of Shipping - 2012

GRAPH (7) : The Average Age of the Container ships DWT%



68 % of Container ships are 0-9 age range, 19 % are 10-19 age range, 11 % are 20-29 age range and 2 % are 30 age and over.

Tablo10 shows the average age of the Ro- Ro Ships, (26 ships) which are 237.697 DWT.

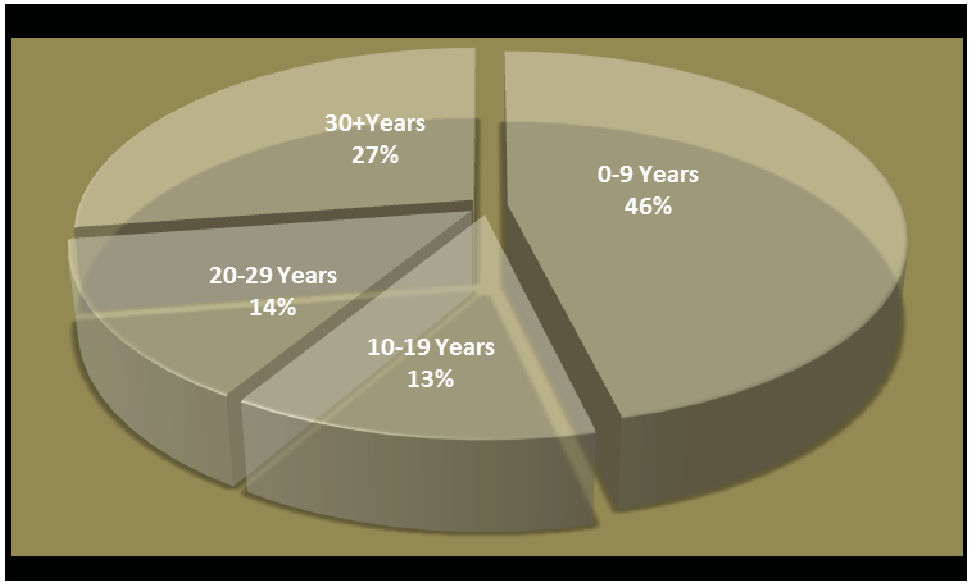
- 10 ships of 109.972 Dwt are 0-9 age range,
- 3 ship of 29.525 Dwt are 10-19 age range,
- 4 ships of 33.123 Dwt are 20-29 age range,
- 9 ships of 65.077 Dwt are 30 age range and over.

TABLE (10) : Ro-Ro Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

DIVISIONS OF TONNAGE	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total		
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%
150-1499	0	0	0	0	0	0	1	457	1	0	0	0	1	457	0
1500-5999	0	0	0	0	0	0	1	4.734	14	5	19.063	29	6	23.797	10
6000-9999	5	47.405	43	3	29.525	100	0	0	0	2	17.330	27	10	94.260	40
10000-34999	5	62.567	57	0	0	0	2	27.932	84	2	28.684	44	9	119.183	50
35000-52999	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
53000-79999	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
80000-119999	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
120000+	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	10	109.972	100	3	29.525	100	4	33.123	100	9	65.077	100	26	237.697	100

Source: Turkish Chamber of Shipping 2012

GRAPH (8) : The Average Age of the Ro- Ro Ships DWT%



46 % of Ro-Ro Ships are 0-9 age range, 13 % are 10-19 age range, 14 % are 20-29 age range and 27 % are 30 age and over.

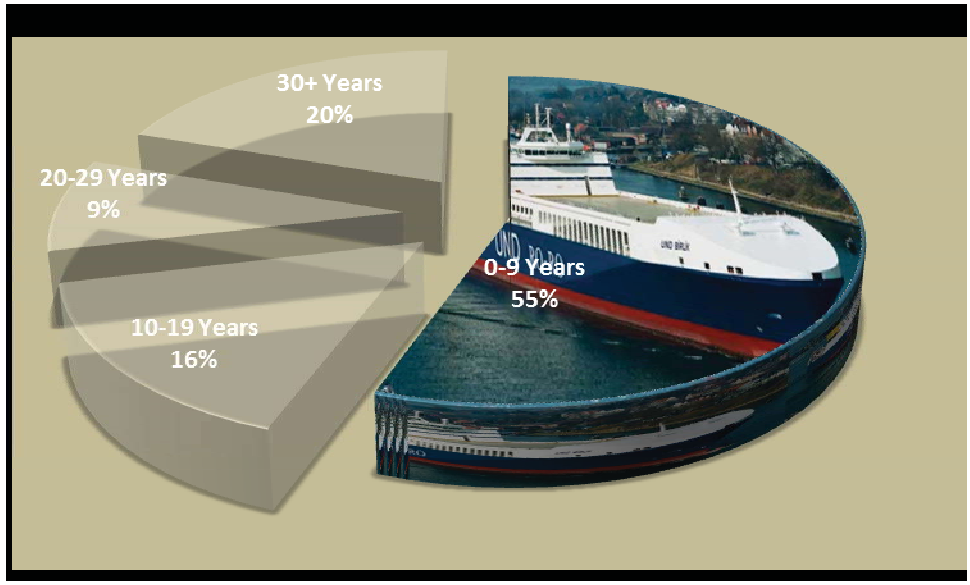
Table 11 shows the average age of the Ro- Ro Ships, (26 ships) which are 530.975 GRT.

- 10 ships of 295.112 Grt are 0-9 age range,
- 4 ships of 83.187 Grt are 10-19 age range,
- 3 ships of 48.466 Grt are 20-29 age range,
- 9 ships of 104.211 Grt are 30 age range and over.
-

TABLE (11) : Ro-Ro Ships by Tonnage and Age Groups (GRT) (1000 GRT and Over)															
DIVISIONS OF TONNAGE	0-9 Years			10-19 Years			20-29 Years			30+Years			Total		
	No	GRT	%	No	GRT	%	No	GRT	%	No	GRT	%	No	GRT	%
150-499	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
500-1600	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1601-3000	0	0	0	0	0	0	0	0	0	1	2981	3	0	2981	1
3001-5000	0	0	0	1	3780	5	0	0	0	1	3.324	3	0	7104	1
5001-10000	0	0	0	0	0	0	1	9.088	19	2	15.487	15	0	24575	5
10001-30000	8	232.032	79	3	79.407	95	2	39.378	81	5	82.419	79	0	433236	82
30001-50000	2	63.080	21	0	0	0	0	0	0	0	0	0	0	63080	12
50001 +	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	10	295.112	100	4	83.187	100	3	48.466	100	9	104.211	100	26	530.976	100

Source : Turkish Chamber of Shipping - 2012

GRAPH (9) : The Average Age of the Ro- Ro Ship GRT %



55 % of Ro-Ro Ships are 0-9 age range, 16 % are 10-19 age range, 9 % are 20-29 age range and 20 % are 30 age and over.

Turkish Merchant Fleet by Number and Tonnage 1000 DWT and Over

(Accepted International Seaborne Transportation Tonnage)

Table 12 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 748 ships, 14 % of total fleet (105 ships) registered in National Ship Registry and 86 % of total fleet (643 ships) registered in International Ship Registry.

The total DWT and GRT values of ships which are 1000 DWT and over are 10.093.986 DWT and 6.601.605 GRT. The majority of these tonnage on DWT basis is composed of 50.65 % bulk carriers,15.14 % dry cargo ships and 13,73 % oil tankers.

This segment consists of the 97 % of the total fleet on DWT bases.

6,2 % of the dry cargo segment which is totally 1.528.394 DWT are registered in National Ship Registry, 93,8 % are registered in International Ship Registry.

8,1 % of the dry bulk segment which is totally 5.113.412 DWT are registered in National Ship Registry, 91,9 % are registered in International Ship Registry.

3.4 % of the oil tanker segment which is totally 1.385.502 are registered in National Ship Registry, 96.6 % are registered in International Ship Registry.

4.3 % of the Chemical Tankers which are totally 702.298 DWT are registered in national Ship Registry. 95.7 % are registered in International Ship Registry.

22.5 % of the container ship segment which is totally 820.452 DWT are registered in National Ship Registry, 77.6 % are registered in International Ship Registry.

GRAPH (10) : Turkish Fleet According to Registries, 1000 DWT and Over

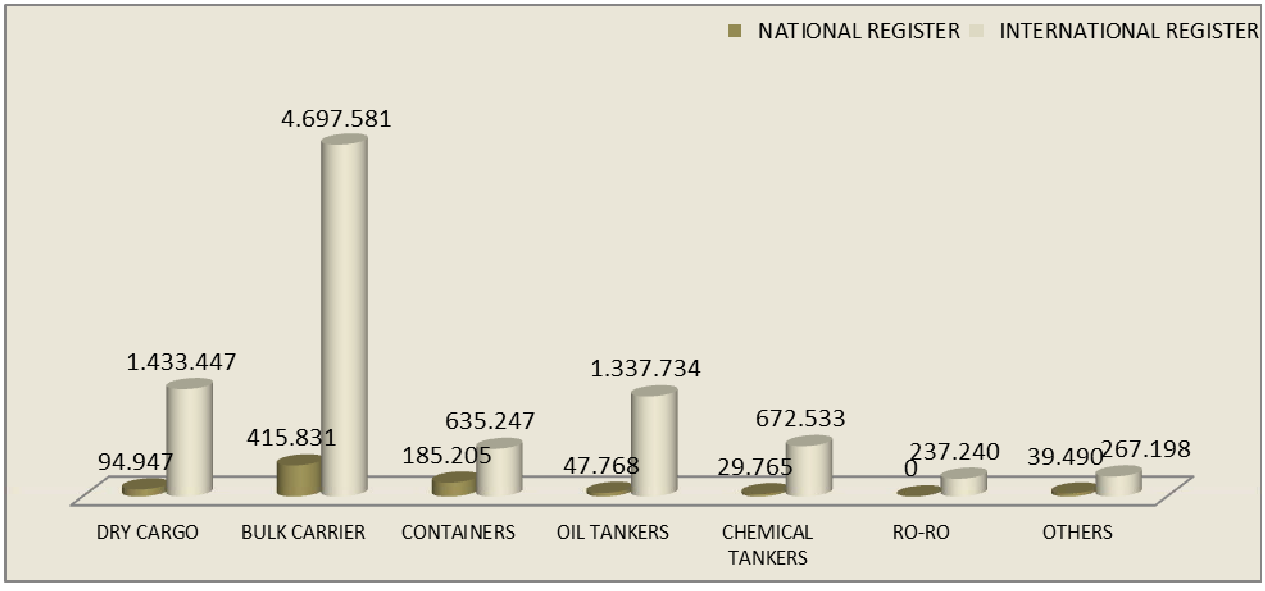


TABLE (12) The General Examination of The Turkish Merchant Fleet by Number And Tonnage According to Import and Built (1000 DWT and over) 31.12.2012												
SHIP TYPES	COUNT				DWT				GRT			
	IMPORT	BUILT	TOTAL	%	IMPORT	BUILT	TOTAL	%	IMPORT	BUILT	TOTAL	%
DRY CARGO	76	270	346	46,3	566.296	962.098	1.528.394	15,1	379.074	600.571	979.645	14,8
BULK CARRIER	99	14	113	15,1	4.675.054	438.358	5.113.412	50,7	2.626.793	264.201	2.890.994	43,8
CONTAINERS	29	24	53	7,1	538.543	281.909	820.452	8,13	432.130	219.959	652.089	9,88
DRY CARGO/CONTAINERS	4	15	19	2,54	16.630	118.390	135.020	1,34	11.745	83.395	95.140	1,44
OIL TANKERS	18	31	49	6,56	1.298.731	86.771	1.385.502	13,7	697.594	53.333	750.927	11,4
CHEMICAL TANKERS	29	52	81	10,8	379.463	322.835	702.298	6,96	233.202	218.046	451.248	6,84
LPG TANKERS	7	0	7	0,94	35.029	0	35.029	0,35	32.751	0	32.751	0,5
ASPHALT TANKERS	1	0	1	0,13	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	23	2	25	3,35	216.123	21.117	237.240	2,35	469.188	58.008	527.196	7,99
RO-RO/PASSERGER	7	4	11	1,47	22.962	6.468	29.430	0,29	46.001	7.127	53.128	0,8
FERRY BOATS	1	1	2	0,27	1.790	1.839	3.629	0,04	10.552	1.435	11.987	0,18
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	0,06	15.195	0	15.195	0,23
PASSENGER AND CARGO SHIPS	5	1	6	0,8	10.495	1.700	12.195	0,12	39.746	10.583	50.329	0,76
HARBOUR CAR FERRIES	0	10	10	1,34	0	17.560	17.560	0,17	0	12.953	12.953	0,2
TUGS	1	1	2	0,27	1.394	1.049	2.443	0,02	1.565	1.356	2.921	0,04
SERVICE SHIPS	8	9	17	2,14	25.626	10.925	37.600	0,36	46.247	3.448	50.192	0,75
BARNE/FLOATING PONTOON	2	0	2	0,27	19.774	0	19.774	0,2	19.608	0	19.608	0,3
OTHERS	1	0	1	0,13	1.739	0	1.739	0,02	746	0	746	0,01
TOTAL	**312**	**435**	**748**	**100**	**7.818.685**	**2.274.252**	**10.093.986**	**100**	**5.064.037**	**1.537.070**	**6.601.604**	**100**

Source : Turkish Chamber of Shipping - 2012

TABLE (13): The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries (1000 DWT and over) 31.12.2012														
SHIP TYPES	NATIONAL REGISTER				INTERNATIONAL REGISTER				NAT.&INTERNAT.REG.				TOTAL	
	IMPORT		BUILT		IMPORT		BUILT		IMPORT		BUILT			
	NR.	%	NR.	%	NR.	%	NR.	%	NR.	%	NR.	%	NR.	%
DRY CARGO	18	35,29	26	48,15	58	22,31	244	63,71	76	24,36	270	61,93	346	46,26
BULK CARRIER	10	19,61	1	1,85	89	34,23	13	3,39	99	31,73	14	3,21	113	15,11
CONTAINERS	8	15,69	1	1,85	21	8,08	23	6,01	29	9,29	24	5,50	53	7,09
DRY CARGO/CONTAINERS	1	1,96	0	0,00	3	1,15	15	3,92	4	1,28	15	3,44	19	2,54
OIL TANKERS	3	5,88	4	7,41	26	10,00	48	12,53	29	9,29	52	11,93	81	10,83
CHEMICAL TANKERS	0	0,00	0	0,00	7	2,69	0	0,00	7	2,24	0	0,00	7	0,94
LPG TANKERS	1	1,96	0	0,00	0	0,00	0	0,00	1	0,32	0	0,00	1	0,13
ASPHALT TANKERS	0	0,00	0	0,00	23	8,85	2	0,52	23	7,37	2	0,46	25	3,34
RO-RO SHIPS	0	0,00	1	1,85	7	2,69	3	0,78	7	2,24	4	0,92	11	1,47
RO-RO/PASSERGER	0	0,00	0	0,00	1	0,38	1	0,26	1	0,32	1	0,23	2	0,27
FERRY BOATS	0	0,00	2	3,70	0	0,00	0	0,00	0	0,00	2	0,46	2	0,27
TRAIN FERRIES	3	5,88	1	1,85	2	0,77	0	0,00	5	1,60	1	0,23	6	0,80
TRAIN FERRIES/RO-RO	0	0,00	3	5,56	0	0,00	7	1,83	0	0,00	10	2,29	10	1,34
PASSENGER AND CARGO SHIP	0	0,00	1	1,85	0	0,00	1	0,26	1	0,32	1	0,23	2	0,27
HARBOUR CAR FERRIES	3	5,88	8	14,81	5	1,92	1	0,26	8	2,56	9	2,06	17	2,27
TUGS	0	0,00	0	0,00	2	0,77	0	0,00	2	0,64	0	0,00	2	0,27
SERVICE SHIPS	0	0,00	0	0,00	1	0,38	0	0,00	1	0,32	0	0,00	1	0,13
BARGE/FLOATING PONTOON	4	7,84	6	11,11	14	5,38	25	6,53	18	5,77	31	7,11	49	6,55
OTHERS	0	0,00	0	0,00	1	0,38	0	0,00	1	0,32	0	0,00	1	0,13
TOTAL	**51**	**100,00**	**54**	**100,00**	**260**	**100,00**	**383**	**100,00**	**312**	**100,00**	**436**	**100,00**	**748**	**100,00**

Source : Turkish Chamber of Shipping - 2012

TABLE (14) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 DWT and over) 31.12.2012												
SHIP TYPES	COUNT				DWT				GRT			
	NATIONAL REG.	INTER. REG.	TOTAL	%	NATIONAL REG.	INTER. REG.	TOTAL	%	NATIONAL REG.	INTER. REG.	TOTAL	%
DRY CARGO	44	302	346	46,25	94.947	1.433.447	1.528.394	15,14	58.968	920.678	979.646	14,84
BULK CARRIER	11	102	113	15,11	415.831	4.697.581	5.113.412	50,65	240.478	2.650.516	2.890.994	43,79
CONTAINERS	9	44	53	7,09	185.205	635.247	820.452	8,13	145.941	506.148	652.089	9,88
DRY CARGO/ CONTAINERS	1	18	19	2,54	2.356	132.664	135.020	1,34	1.720	93.420	95.140	1,44
OIL TANKERS	10	39	49	6,55	47.768	1.337.734	1.385.502	13,73	30.060	720.867	750.927	11,37
CHEMICAL TANKERS	7	74	81	10,83	29.765	672.533	702.298	6,96	19.907	431.341	451.248	6,84
LPG TANKERS	0	7	7	0,94	0	35.029	35.029	0,35	0	32.751	32.751	0,5
ASPHALT TANKERS	1	0	1	0,13	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	0	25	25	3,34	0	237.240	237.240	2,35	0	527.196	527.196	7,99
RO-RO/PASSERGER	1	10	11	1,47	1.339	28.091	29.430	0,29	977	52.151	53.128	0,8
FERRY BOATS	0	2	2	0,27	0	3.629	3.629	0,04	0	11.987	11.987	0,18
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	0,06	0	15.195	15.195	0,23
PASSENGER AND CARGO SHIPS	4	2	6	0,8	9.279	2.916	12.195	0,12	34.172	16.157	50.329	0,76
HARBOUR CAR FERRIES	3	7	10	1,34	4.926	12.634	17.560	0,17	3.398	9.555	12.953	0,2
TUGS	1	1	2	0,27	1.394	1.049	2.443	0,02	1.565	1.356	2.921	0,04
SERVICE SHIPS	11	6	17	2,27	14.193	23.407	37.600	0,37	5.341	44.851	50.192	0,76
BARGE/FLOATING PONTOON	0	2	2	0,27	0	19.774	19.774	0,2	0	19.608	19.608	0,3
OTHERS	0	1	1	0,13	0	1.739	1.739	0,02	0	746	746	0,01
TOTAL	**105**	**643**	**748**	**100**	**813.006**	**9.280.980**	**10.093.986**	**100**	**547.082**	**6.054.523**	**6.601.605**	**100**

Source : Turkish Chamber of Shipping - 2012

TABLE (15) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries DWT (1000 DWT and over) 31.12.2012

SHIP TYPES	NATIONAL REGISTER				INTERNATIONAL REGISTER				NAT.&INTERNATIONAL REGISTER				Total	
	Import	%	Built	%	Import	%	Built	%	Import	%	Built	%	DWT	%
DRY CARGO	49.477	7,22	45.470	35,57	516.819	7,24	916.628	42,68	566.296	7,24	962.098	42,28	1.528.394	15,14
BULK CARRIER	398.340	58,14	17.491	13,68	4.276.714	59,95	420.867	19,60	4.675.054	59,81	438.358	19,27	5.113.412	50,66
CONTAINERS	178.705	26,08	6.500	5,08	359.838	5,04	275.409	12,82	538.543	6,89	281.909	12,39	820.452	8,13
DRY CARGO/CONTAINERS	2.356	0,34	0	0,00	14.274	0,20	118.390	5,51	16.630	0,21	118.390	5,20	135.020	1,34
OIL TANKERS	34.647	5,06	13.121	10,26	1.264.084	17,72	73.650	3,43	1.298.731	16,61	86.771	3,81	1.385.502	13,73
CHEMICAL TANKERS	6.622	0,97	23.143	18,10	372.841	5,23	299.692	13,96	379.463	4,85	322.835	14,19	702.298	6,96
LPG TANKERS	0	0,00	0	0,00	35.029	0,49	0	0,00	35.029	0,45	0	0,00	35.029	0,35
ASPHALT TANKERS	2.770	0,40	0	0,00	0	0,00	0	0,00	2.770	0,04	0	0,00	2.770	0,03
RO-RO SHIPS	0	0,00	0	0,00	216.123	3,03	21.117	0,98	216.123	2,76	21.117	0,93	237.240	2,35
RO-RO/PASSERGER	0	0,00	1.339	1,05	22.962	0,32	5.129	0,24	22.962	0,29	6.468	0,28	29.430	0,29
FERRY BOATS	0	0,00	0	0,00	1.790	0,03	1.839	0,09	1.790	0,02	1.839	0,08	3.629	0,04
TRAIN FERRIES	0	0,00	3.233	2,53	0	0,00	0	0,00	0	0,00	3.233	0,14	3.233	0,03
TRAIN FERRIES/RO-RO	0	0,00	0	0,00	6.266	0,09	0	0,00	6.266	0,08	0	0,00	6.266	0,06
PASSENGER AND CARGO SHIPS	7.579	1,11	1.700	1,33	2.916	0,04	0	0,00	10.495	0,13	1.700	0,07	12.195	0,12
HARBOUR CAR FERRIES	0	0,00	4.926	3,85	0	0,00	12.634	0,59	0	0,00	17.560	0,77	17.560	0,17
TUGS	1.394	0,20	0	0,00	0	0,00	1.049	0,05	1.394	0,02	1.049	0,05	2.443	0,02
SERVICE SHIPS	3.268	0,48	10.925	8,55	22.358	0,31	1.049	0,05	25.626	0,33	11.974	0,53	37.600	0,37
BARGE/FLOATING PONTOON	0	0,00	0	0,00	19.774	0,28	0	0,00	19.774	0,25	0	0,00	19.774	0,20
OTHERS	0	0,00	0	0,00	1.739	0,02	0	0,00	1.739	0,02	0	0,00	1.739	0,02
TOTAL	685.158	100,00	127.848	100,00	7.133.527	100,00	2.147.453	100,00	7.816.946	100,02	2.275.301	100,00	10.093.986	100

Source : Turkish Chamber of Shipping - 2012

The Position of The Turkish Merchant Fleet Within the World Fleet

In 2012 our tonnage under foreign flags has reached up to 14 billion DWT, as of 1 January 2013, concerning the ships of 1000 Grt and above, the total tonnage of the Turkish shipowners, both under Turkish flag and foreign flags reached 30.3 million DWT.

As of the beginning of 2013, regarding the Turkish Ship owners' ships of 1000 GRT and above, 31.3 % percent of these ships are registered under Turkish flag and 68.7 % are registered under foreign flags.

TABLE (16): Turkish Ships Under the National Flag and Foreign Flags (1000Grt and over)

(1000 GRTve üzeri)

	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	4.650	41,84	870	11.114
2008	490	6.592	50	513	6.591	50	1.003	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
2013	**627**	**9.488**	**31,3**	**842**	**20.838**	**68,7**	**1.469**	**30.326**

Source : ISL January-February 2012

GRAPH (11) : Progress of the Turkish Merchant Fleet

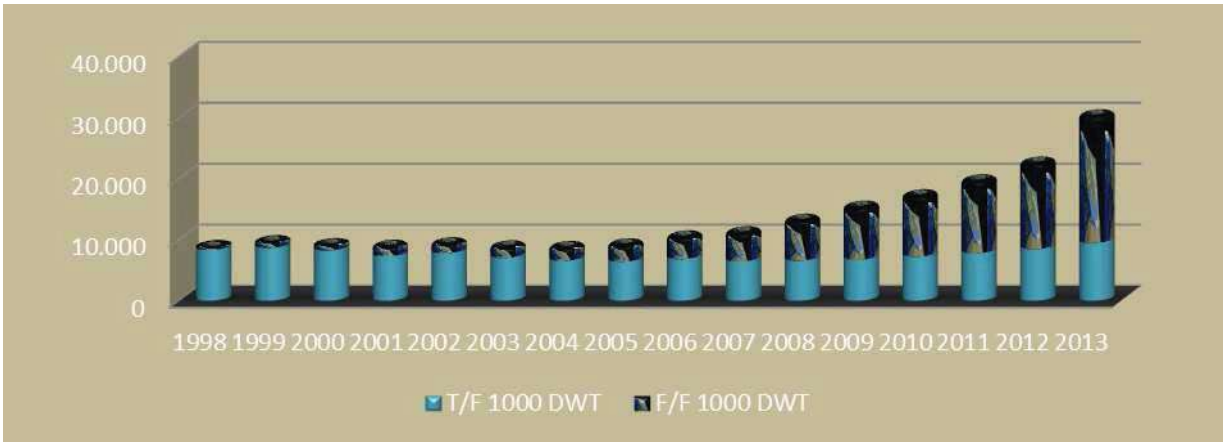


TABLE (17) : Total Fleet of the 30 countries by National and Foreign Flags

(01 January 2013) ***(1000 GRT and over)***

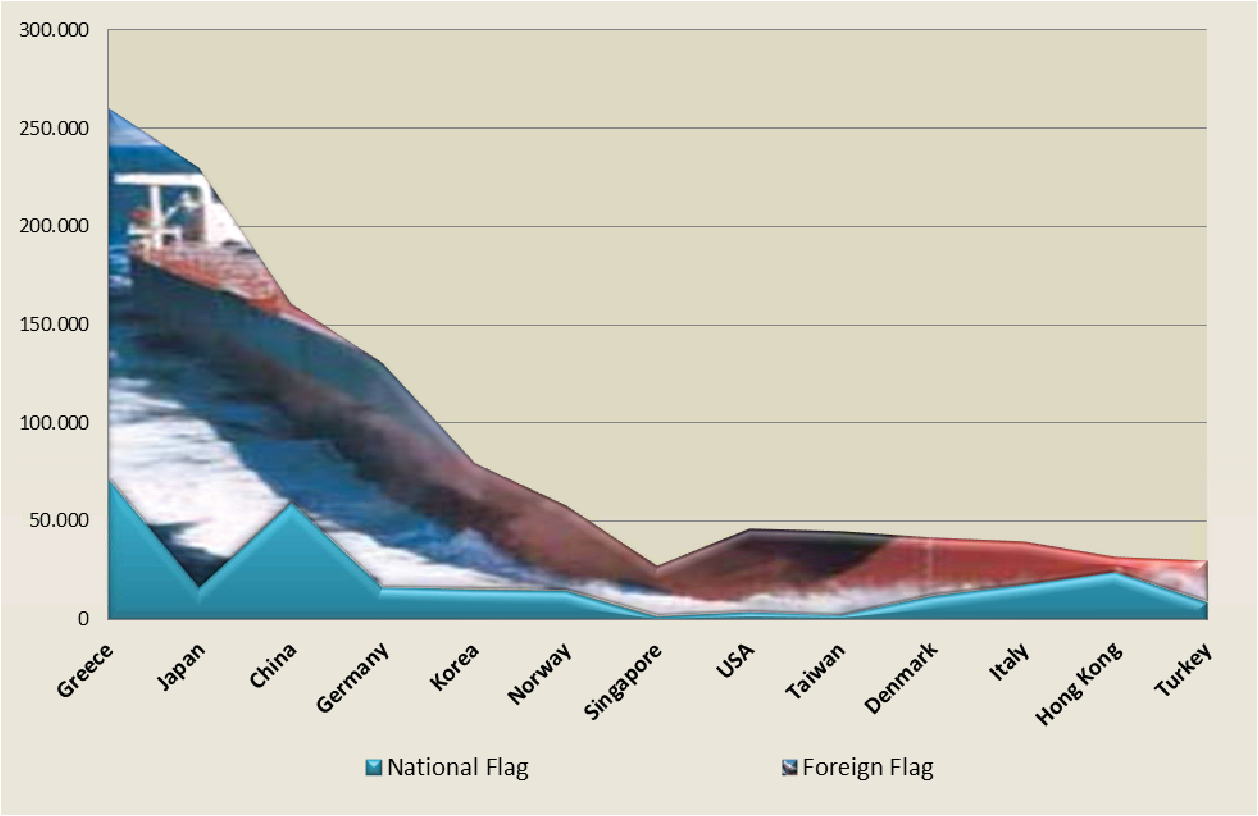
DWT rank	Country	National Flag				International Flag				Total fleet Controlled			
		No	1000 DWT	1000 TEU	Av. Age	No	1000 DWT	1000 TEU	Av Age	No	1000 DWT	1000 TEU	Av. Age
1	Greece	815	71.889	207	13.2	2949	188549	1013	11.2	3764	260438	1219	11.6
2	Japan	698	16.897	13	12.8	3410	213045	1390	6.9	4108	229942	1403	7.9
3	China, RP	1905	59.632	515	14.0	2185	101273	696	12.5	4090	160905	1211	13.2
4	Germany	378	16.820	1196	12.2	3649	114159	4904	8.5	4027	130979	6100	8.9
5	Korea Rep.	710	15.859	96	17.4	898	63845	468	9.8	1608	97704	564	13.2
6	Norway	521	15.366	51	15.9	1071	43150	233	13.7	1592	58516	285	14.4
7	Singapore	646	2.213	419	8.6	531	25574	112	16.8	1777	47787	531	12.3
8	US	201	4.550	80	22.7	781	42413	153	13.3	982	46963	233	15.2
9	Taiwan	88	3.328	69	16.6	710	42099	781	10.2	798	45426	850	10.9
10	Denmark	331	12.616	612	12.5	628	29592	761	8.9	959	42208	1373	10.1
11	Italy	569	18.222	76	13.0	494	22187	968	12.0	1063	40409	1043	12.5
12	Hong Kong	386	24.647	286	6.8	264	7919	31	16.2	650	32566	317	10.6
13	**Turkey**	**627**	**9.488**	**88**	**17.4**	**842**	**20.838**	**91**	**16.7**	**1469**	**30.327**	**179**	**17.0**
14	India	391	14.374	23	12.7	148	9073	13	11.5	539	23446	36	12.4
15	Canada	110	993	6	29.6	299	21108	407	10.7	409	22101	414	15.8
16	Russia	923	4.713	64	27.4	520	16457	59	18.0	1443	21171	123	24.0
17	Israel	6	297	25	11.3	259	18696	484	9.6	265	18993	509	9.6
18	Iran	64	701	27	17.9	142	14745	85	11.9	206	15446	112	13.8
19	Saudi Arabia	37	637	11	24.9	86	14239	1	9.6	123	14876	11	14.2
20	Belgium	56	5.297	1	10.9	12	8752	30	7.1	176	14049	31	8.3
21	Malaysia	246	7.374	20	15.1	99	5855	3	12.7	345	13229	23	14.4
22	U.K.	229	4.711	38	10.7	238	8161	20	14.4	467	12872	58	12.6
23	Indonesia	1146	9.578	124	24.8	139	3170	11	15.6	1285	12748	135	23.8
24	Brazil	78	2081	21	22.5	42	9333	5	11.3	120	11414	25	18.5
25	U.A.E.	39	322	1	18.0	329	9914	43	18.3	368	10236	44	18.2
26	France	124	3.155	178	12.7	143	5934	386	10.3	267	9089	564	11.4
27	Netherlands	587	4811	208	8.4	289	3647	69	13.8	876	8458	276	10.2
28	Kuwait	32	4.031	28	12.3	36	2863	187	6.6	68	6893	215	9.3
29	Viet Nam	592	5.305	24	10.4	76	1303	8	20.7	668	6608	32	11.6
30	Sweden	102	1.195	7	16.1	217	5384	16	13.0	319	6578	23	14.0
Total 30 countries		**12.637**	**361.101**	**4.512**	**15.5**	**21.594**	**1.073.275**	**13.427**	**11.1**	**34.231**	**1.434.376**	**17.940**	**12.7**

Source . ISL January/February 2013

Table 17 shows the first 30 countries which own the largest merchant fleet in the world scale. 94 % of the World fleet (**1000 Grt and over**) of 1.5 Million DWT, is being controlled by the following countries as of 1 January 2013.

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 China is on the 3rd row, whereas Turkey is on the 13th row.

GRAPH (12) : By Country of Domicile as of 1 January 2013



The World fleet (300 GRT and over) is 48742 ships of 1.539.263.000 DWT based on 156 countries as of 01.01.2013. The position of Turkish merchant fleet is shown in the Table as being on 22rd place in World ranking

Panama, having a share of 22.1 % is in the first place, Liberia, having a share of 12.6 % is in the second place, Marshall Island, having a share of 8.6 % is in the third place.

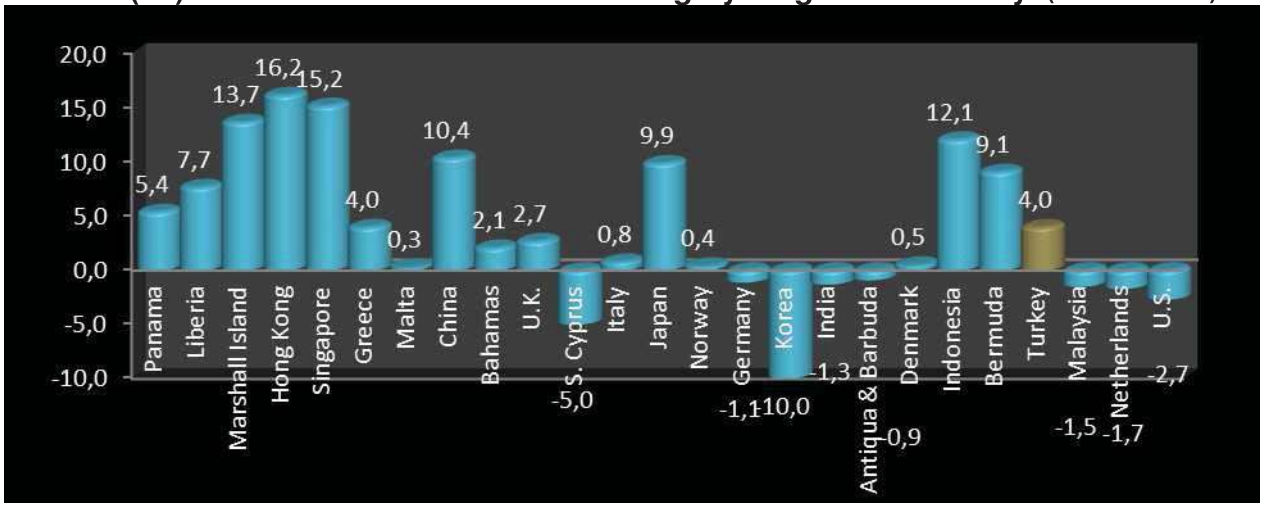
The Turkish fleet range among the World fleets between the years 2004 and 2012 is as follows :

- 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
- In 2013, the 22nd

TABLE (18): World Merchant Fleet Ranking by Flag as of January 1st,2013 (300 GRT and over)

DWT rank	Flag	No of	1000 GRT	1000 DWT	1000 TEU	DWT %	% Change
1	Panama	6.979	221.060	340.339	3.245	22.1	5.4
2	Liberia	2.988	124.655	194.213	3.820	12.6	7.7
3	Marshall Island	1.878	80.580	132.866	766	8.6	13.7
4	Hong Kong	2.070	77.349	128.960	1.473	8.4	16.2
5	Singapore	1.896	56.615	88.173	1.090	5.7	15.2
6	Greece	1.098	42.751	75.963	208	4.9	4.0
7	Malta	1.675	43.689	68.195	549	4.4	0.3
8	China	2.380	40.245	63.867	533	4.1	10.4
9	Bahamas	1.173	48.203	63.074	279	4.1	2.1
10	U.K.	958	31.057	41.109	1.034	2.7	2.7
11	S. Cyprus	834	19.918	31.241	478	2.0	-5.0
12	Italy	801	17.611	20.090	148	1.3	0.8
13	Japan	2.684	14.871	19.485	15	1.3	9.9
14	Norway	828	14.523	18.738	59	1.2	0.4
15	Germany	451	15.101	17.245	1.228	1.1	-1.1
16	Korea	1.051	10.623	17.043	97	1.1	-10.0
17	India	604	8.677	14.966	30	1.0	-1.3
18	Antiqua & Barbuda	1.256	11.029	14.305	844	0.9	-0.9
19	Denmark	450	11.324	13.698	631	0.9	0.5
20	Indonesia	2.227	8.129	11.289	136	0.7	12.1
21	Bermuda	142	10.304	10.297	38	0.7	9.1
22	**Turkey**	**930**	**6.619**	**9.960**	**90**	**0.6**	**4.0**
23	Malaysia	430	6.300	8.457	46	0.5	**-1.5**
24	Netherlands	897	7.503	8.483	322	0.5	-1.7
25	U.S.	349	6.987	7.543	229	0.5	-2.7
	World Total	**48.742**	**1.023.682**	**1.539.263**	**18.616**		**6.7**

GRAPH (13) : World Merchant Fleet Ranking by Flag as of January (300 GRT/over)



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 19. 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.

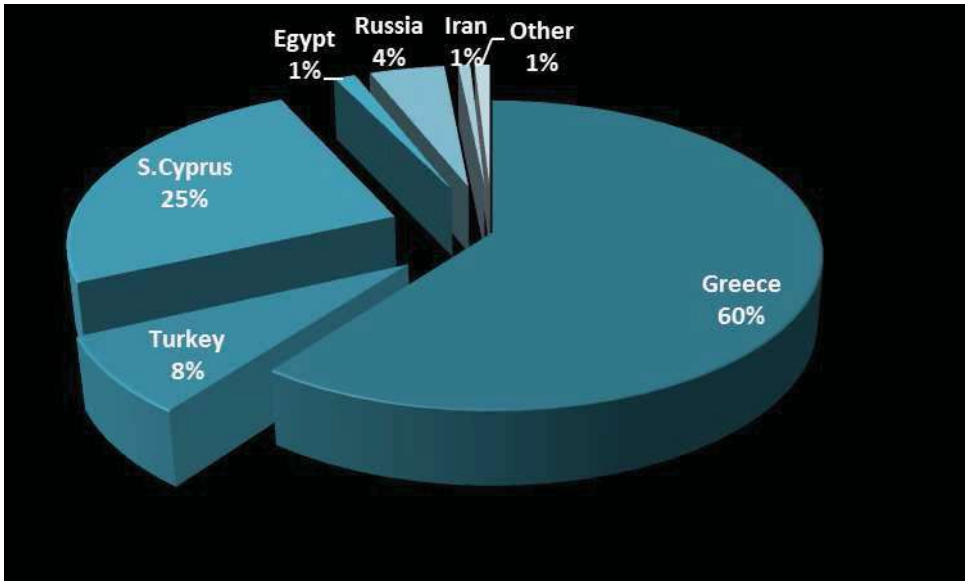
.

TABLE (19) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2013)
(300 grt and over)

World dwt Rank	Country	No	1000 DWT	World Share %	Change Rate %
6	Greece	1.098	75.963	4.9	4.0
11	S.Cyprus	834	31.241	2.0	-5.0
22	**Turkey**	**930**	**9.960**	**0.6**	**4.0**
31	Russia	1239	5526	0.4	-0.1
50	Egypt	89	1568	0.1	-5.1
62	Iran	234	879	0.1	15,2
73	Bulgaria	45	495	0.0	-20.7
81	Ukraine	142	423	0.0	-25.0
97	Syria	24	119	0.0	-62.3
108	Romania	18	56	0.0	6.3
119	Iraq	3	28	0.0	0

Source : ISL January-February 2013

GRAPH (14) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2013)

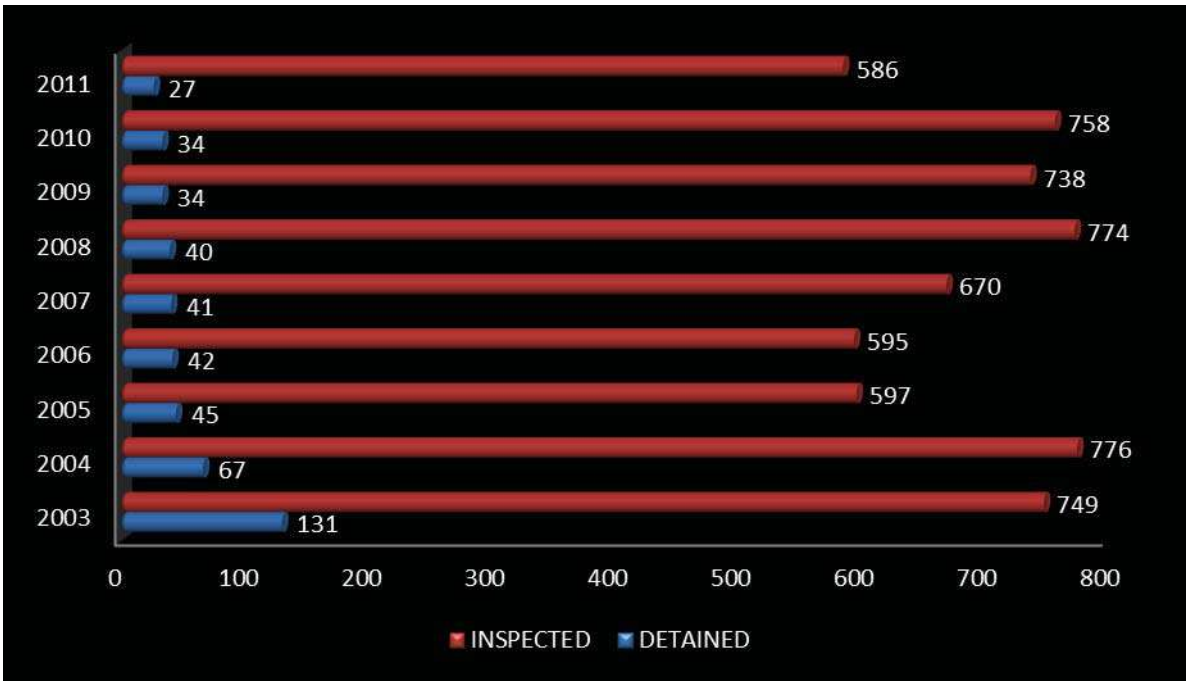


Port State Control Applications

Turkey is in the White List.

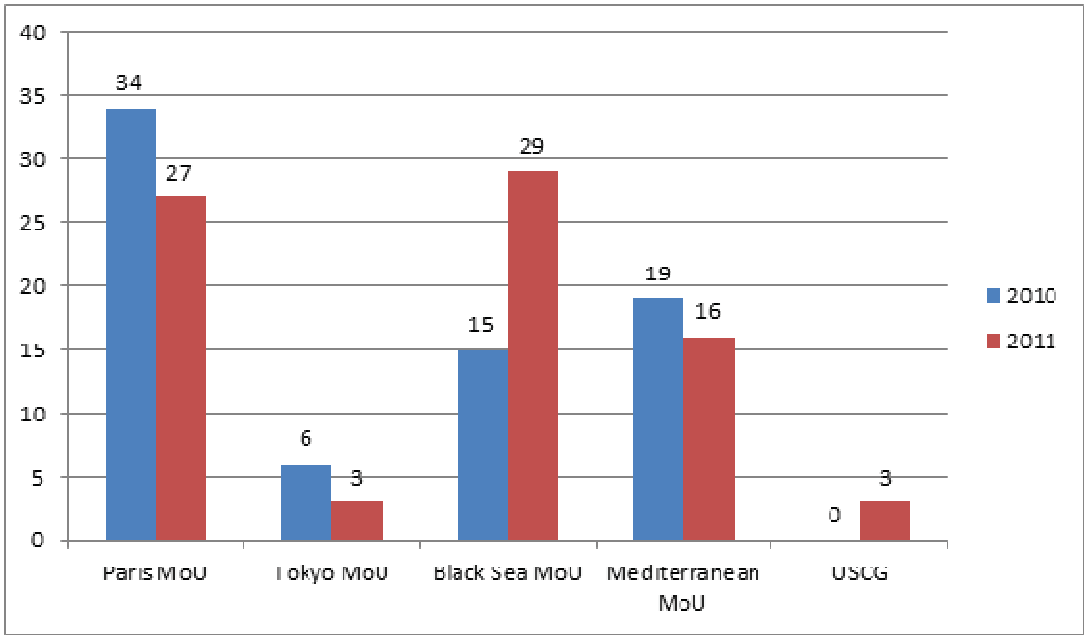
Graph 17 shows monthly detention rates in Paris MoU in year 2011

GRAPH (15) : 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 (16) : 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

87 % of the Turkey's foreign trade is being realised by maritime transportation. The progress of transportation between the years of 2002-2012 is shown in the Table below by the modes of transportation.

TABLE (20) : Foreign Trade Transportation by Modes (%)

YEARS	SEA	RAIL	ROAD	AIR	OTHER
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	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
2012	87,0	0,6	10,7	0,4	1,4

Source : Turkstat

87% of the volume of Turkey's foreign trade transportation has been carried by sea, 10.7 % has been carried by road, 0,6 % has been carried by rail, 0,4% has been carried by air, 1,4% has been carried by other transportation modes. .

GRAPH (17) : Foreign Trade Transportation by Modes (%)

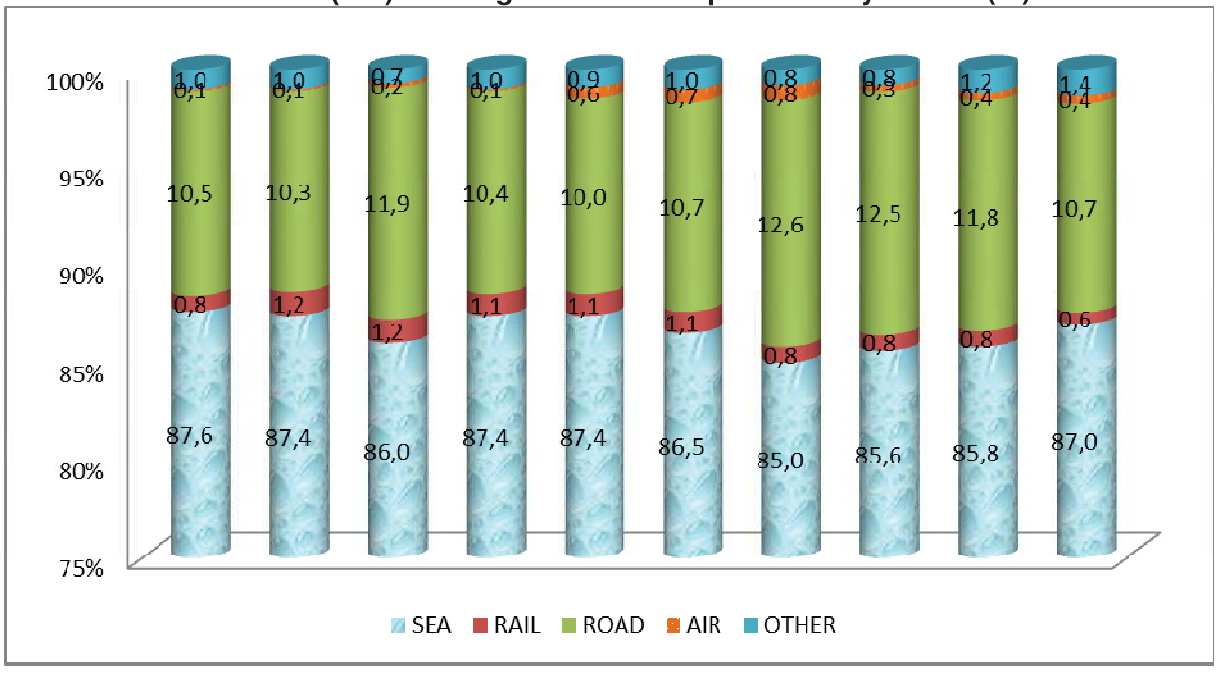


TABLE (21) : Foreign Trade Transportation by Modes ($)

My Modes	Import $ 2011	Import $ 2012	Export $ 2011	Export $ 2012	Foreign Trade $ 2011	Foreign Trade $ 2012
Sea	133.434.323.795	129.028.160.299	73.621.892.205	78.015.752.860	207.056.216.000	207.043.913.159
Rail	3.185.490.059	2.346.112.511	1.243.108.048	1.019.263.508	4.428.598.107	3.365.376.019
Road	44.513.837.968	39.417.432.982	50.253.928.734	50.477.951.750	94.767.766.702	89.895.384.732
Air	21.515.036.762	23.797.996.222	8.583.013.431	21.785.180.431	30.098.050.193	45.583.176.653
Other	38.184.547.780	41.954.792.231	1.252.419.153	1.238.504.047	39.436.966.933	43.193.296.278
Total	240.833.236.364	236.544.494.245	134.954.361.571	152.536.652.596	375.787.597.935	389.081.146.841

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 2010-2011-2012 is shown below:

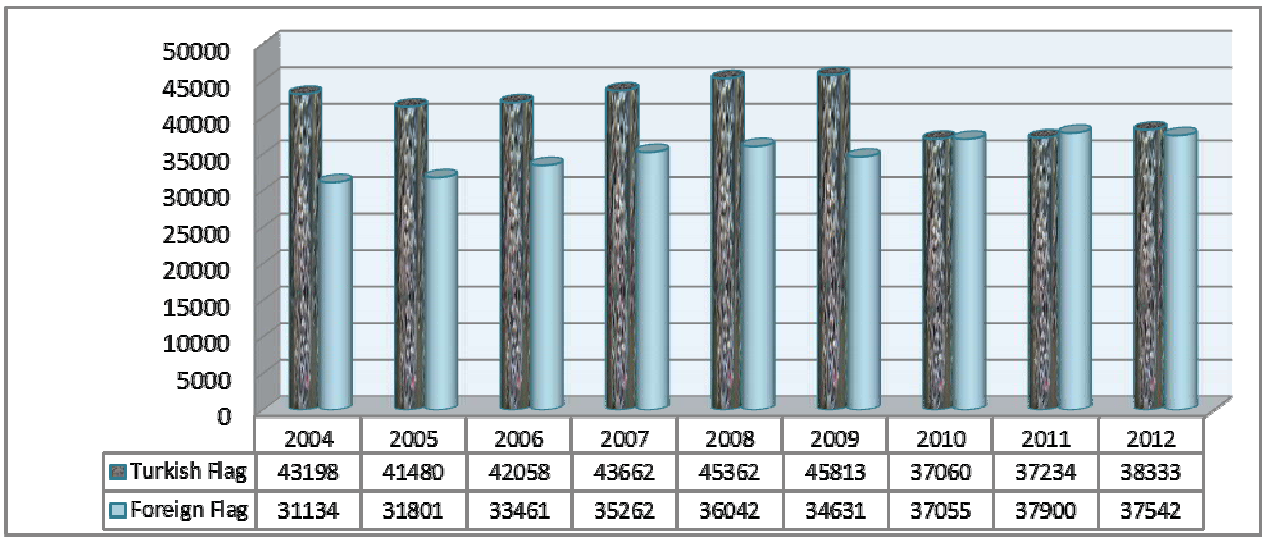
- In 2010, the number of incoming vessels decreased by 7.9% when compared with 2009.
- In 2011, the number of incoming vessels increased by 1.4% when compared with 2010,
- In 2012, the number of incoming vessels increased by 1 % when compared with 2011,

TABLE (22): The Number of Incoming Ships to the Turkish Ports

Years	Turkish Flag Number	Foreign Flag Number	Total Number	TF %	FF %
2004	43.198	31.134	74.332	58,11	41,89
2005	41.480	31.801	73.281	56,60	43,40
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	50,00	50,00
2011	37.234	37.900	75.134	49,60	50,40
2012	38.333	37.542	75.875	50,50	49,50

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

GRAPH (18): Numbers of Incoming Ships to the Turkish Ports



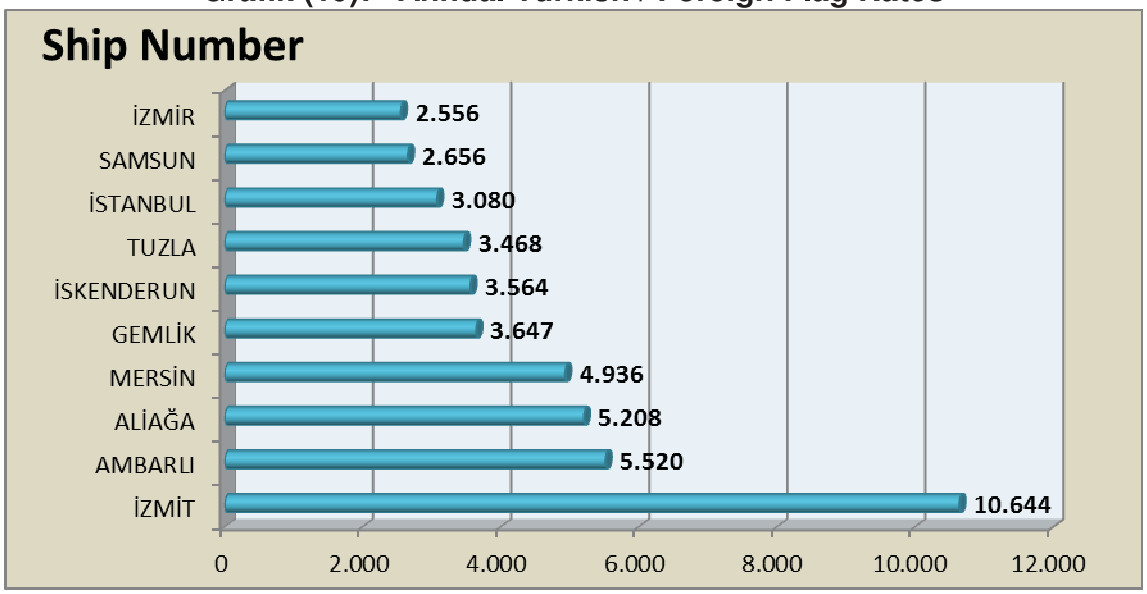
The number of incoming ships to the Turkish ports in monthly basis is shown in the Table 23.

Tablo (23): Numbers of Incoming Ships to the Turkish Ports in 2012

	TURKISH FLAG		FOREIGN FLAG		TOTAL	
PORT	Ship Number	Gros Ton	Ship Number	Gros Ton	Ship Number	Gros Ton
İZMİT	4.253	16.865.872	6.391	88.333.875	10.644	105.199.747
AMBARLI	2.984	22.062.704	2.536	66.401.317	5.520	88.464.021
ALİAĞA	1.787	9.217.705	3.421	45.035.974	5.208	54.253.679
MERSİN	1.806	7.821.215	3.130	43.750.989	4.936	51.572.205
GEMLİK	1.464	6.443.245	2.183	39.398.207	3.647	45.841.453
İSKENDERUN	1.583	3.178.442	1.981	24.883.648	3.564	28.062.090
TUZLA	2.355	12.265.151	1.113	12.952.400	3.468	25.217.551
İSTANBUL	1.710	2.801.018	1.370	31.772.623	3.080	34.573.641
SAMSUN	888	2.622.323	1.768	8.829.646	2.656	11.451.969
İZMİR	663	4.326.342	1.893	44.726.662	2.556	49.053.004
BODRUM	1.384	280.292	767	1.917.942	2.151	2.198.233
TEKİRDAĞ	838	1.956.516	1.162	17.631.396	2.000	19.587.912
BANDIRMA	1.043	1.098.903	832	3.989.570	1.875	5.088.473
ÇEŞME	1.156	3.842.600	406	395.662	1.562	4.238.262
ÇANAKKALE	1.274	1.069.452	281	3.430.945	1.555	4.500.397
DİĞER	13.145	16.712.855	8.308	114.368.228	21.453	131.081.084
TOTAL	**38.333**	**112.564.637**	**37.542**	**547.819.085**	**75.875**	**660.383.722**

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

Grafik (19): 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.

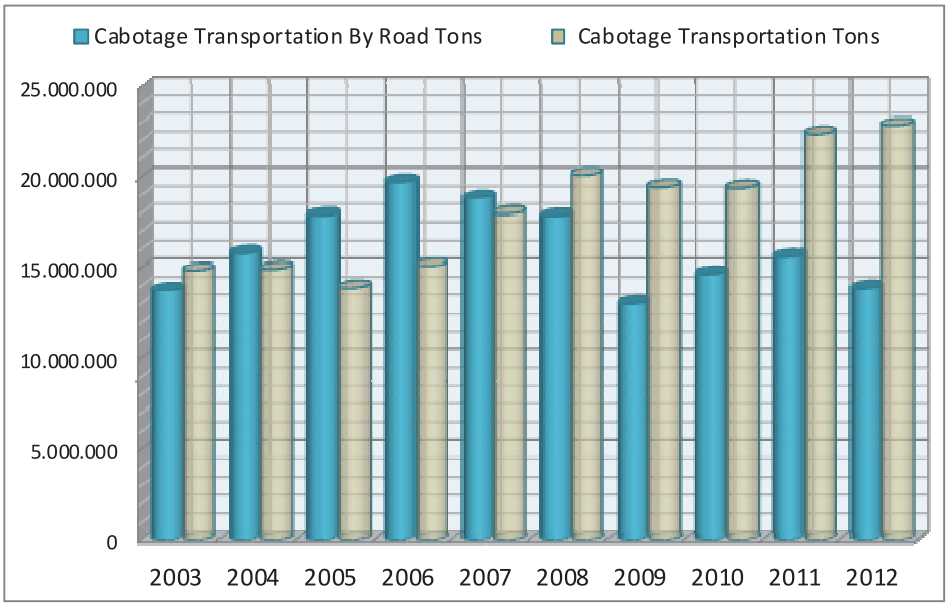
The amounts of cargoes carried by Ferries and carried as bulk and partial cargoes between 2003- 2012 in Turkish ports and wharves on ton basis are at Table 24.

TABLE (24) : 2003-2012 Cabotage Transportation

	Cabotage Transportation	Cabotage Transportation	Total Cabotage	Change
Years	By Road Tons	Tons	Tons	%
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
2012	13.913.980	22.869.458	36.783.438	-3,2

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

GRAPH (20) : 2003-2012 Cabotage Transportation



The total cabotage transportation in 2012 is 36.783.438 tons; 13.913.980 tons is carried by Ferries and 22.869.458 tons is carried as bulk and partial cargoes (Table 25). The cabotage transportation increased about 28.3% between the years 2003-2012.

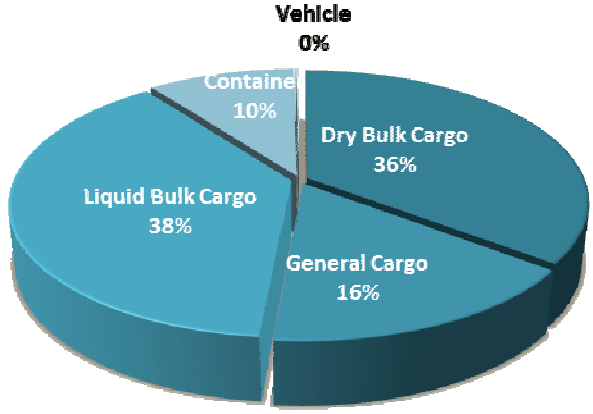
TABLE (25) 2012 –Cabotage Transportation by the Types of Cargoes

BY TYPES OF CARGO HANDLING CABOTAGE

Cargo Types	Cabotage Loading	Cabotage Unloading	Total	Rate %
Dry Bulk Cargo	7.242.304	8.464.905	15.707.209	33,48
General Cargo	3.842.926	3.861.191	7.704.117	16,42
Liquid Bulk Cargo	9.334.316	9.177.150	18.511.466	39,45
Container	2.372.503	2.385.585	4.758.088	10,14
Vehicle	77.409	75.703	153.112	0,33
Total	22.869.458	24.049.929	46.919.387	100,00

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

GRAPH (21) : 2012 –Cabotage Transportation by the Types of Cargoes



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 26 shows the cabotage transportation by types of cargoes. The first three cargoes are liquid bulk cargo (39.45%), dry bulk cargo (33.48%) and general cargo (16,42%).

TABLE (26) : 2012 Cabotage Transportation in Ports

Rank	Port Authority	Loading	Unloading	Total
1	KOCAELİ	4.669.362	3.166.088	7.835.450
2	AMBARLI	1.338.655	4.629.638	5.968.293
3	ALİAĞA	2.890.259	1.997.690	4.887.949
4	İSKENDERUN	2.948.095	535.169	3.483.264
5	KARADENİZ EREĞLİSİ	638.580	1.779.585	2.418.165
6	TUZLA	332.455	1.424.767	1.757.222
7	GEMLİK	783.929	929.657	1.713.586
8	İSTANBUL	55.490	1.645.757	1.701.247
9	SAMSUN	775.457	895.473	1.670.930
10	KARABİGA	805.015	818.218	1.623.233
11	BOTAŞ(CEYHAN)	1.585.110	22.624	1.607.734
12	ÇANAKKALE	1.381.665	120.029	1.501.694
13	MERSİN	412.921	1.032.678	1.445.599
14	TEKİRDAĞ	582.855	503.958	1.086.813
15	ANTALYA	34.597	1.002.657	1.037.254
16	ÜNYE	754.586	201.309	955.895
17	RİZE	8.254	814.856	823.110
18	TRABZON	332.561	379.973	712.534
19	BANDIRMA	410.440	238.573	649.013
20	MARMARA A.	638.706	2.316	641.022
21	İZMİR	172.393	315.396	487.789
22	TİREBOLU	0	455.735	455.735
23	BARTIN	250.953	179.258	430.211
24	YALOVA	38.001	387.198	425.199
25	ZONGULDAK	225.095	149.708	374.803
26	İNEBOLU	289.435	0	289.435
27	HOPA	153.175	100.736	253.911
28	GÜLLÜK	168.075	10.400	178.475
29	AMASRA	144.500	0	144.500
30	GÖCEK	0	88.203	88.203
31	FATSA	0	65.970	65.970
32	MUDANYA	26.337	23.088	49.425
33	ERDEK	0	36.886	36.886
34	ORDU	0	28.411	28.411
35	ÇEŞME	0	23.960	23.960
36	MARMARİS	0	17.932	17.932
37	DİKİLİ	6.880	9.708	16.588
38	GİRESUN	0	10.303	10.303
39	TAŞUCU	10.122	0	10.122
40	GELİBOLU	5.500	1.319	6.819
41	VAKFIKEBİR	0	2.650	2.650
42	BODRUM	0	574	574
43	İĞNEADA	0	500	500
44	BOZCAADA	0	380	380
45	KUŞADASI	0	247	247
46	FOÇA	0	50	50
	Total	22.869.458	24.049.627	46.919.085

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

In cabotage handling in 2012, Kocaeli Port (16.7%), Ambarlı Port (12.7%) and Aliağa Port (10.4%) took the first three place. In cabotage loading, Kocaeli Port (20.4%), Aliağa Port (12.6%) and İskenderun Port (12.9%) are on the first three places, while in cabotage unloading Ambarlı Port (19.2%), İzmit Port (13.2%) and Aliağa Port (8.3%) are on the top of the list.

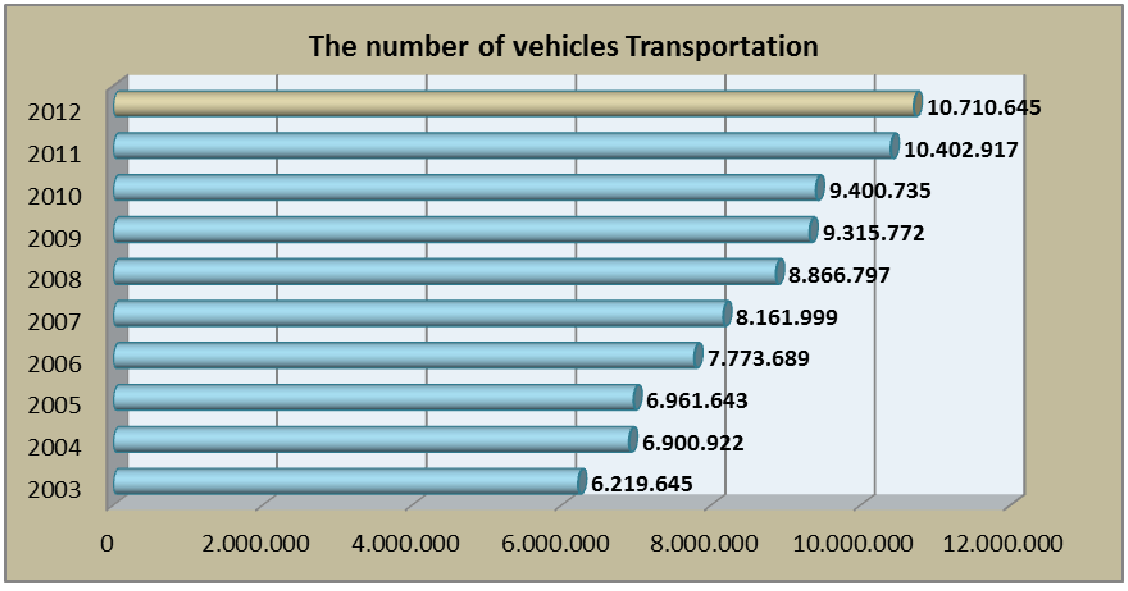
In table 27, the changes in transportation of vehicles in cabotage between the years 2003 and 2012 are being shown. The most significant increase is seen in 2006; with an increase of 11.7% in vehicle numbers and an increase of 22.9% in vehicle / mile. The number of vehicles increased 72.2% in total between 2003 and 2012.

TABLE (27): 2003-2011 Cabotage Transportation Vehicle Number

Yıllar	Vehicle Number	Change %	Vehicle Number x Mile	Change %2
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
2012	10.710.645	2,9	77.785.568	-6,6

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

GRAPH (22) : 2003-2012 Cabotage Transportation Vehicle Number



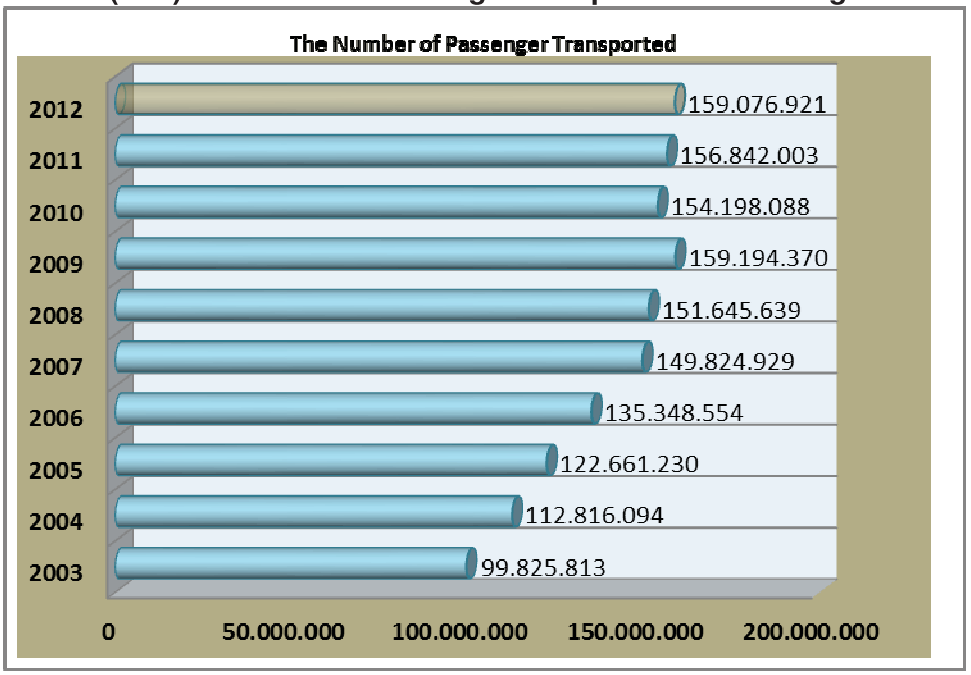
The Table about the numbers of passengers carried in cabotage transportation shows that the biggest increase was in 2004 with 13% and then, in 2007 the increase became 10.7%. In the years 2003-2012 an increase of 59.4 % in passengers' number was realized.

TABLE (28) : 2003-2012 Cabotage Transportation Passenger Number

Years	Passenger Number	Change %	Vehicle Number x Mile	Change %2
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
2012	159.076.921	1,4	787.572.051	-7,9

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

GRAPH (23) : 2003-2012 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 (29) : Development of the Seaborne Trade (2002-2012) Tons

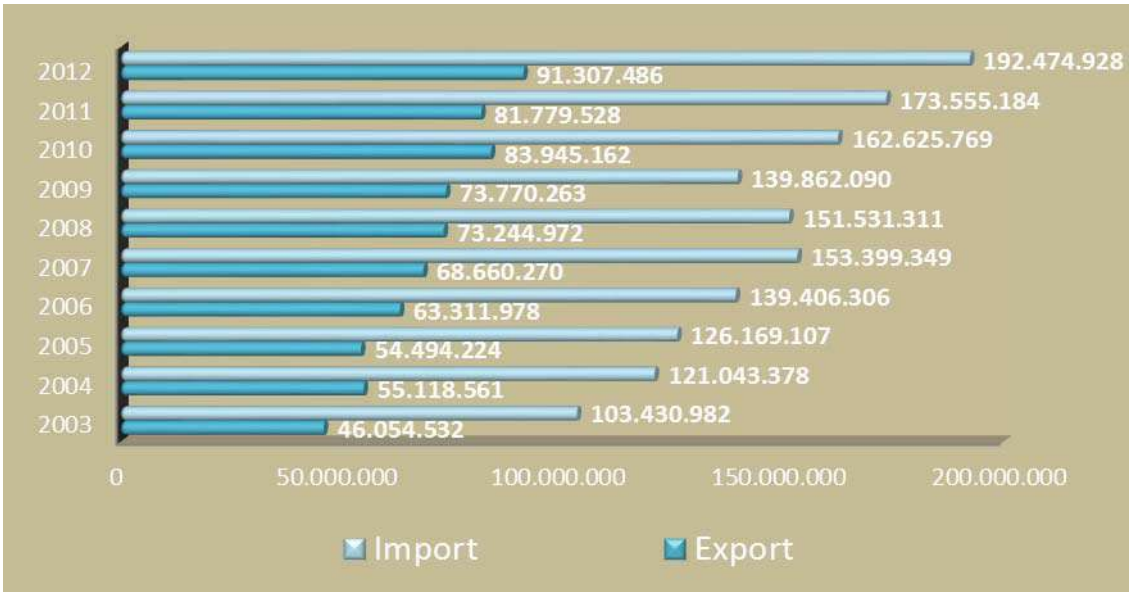
Years	Seaborn Trade Total	Export	Import	Turkish Flag	TF %	FF %
2002	132.832.579	43.004.046	89.828.533	44.167.451	33	67
2003	149.485.514	46.054.532	103.430.982	43.680.964	29	71
2004	176.161.939	55.118.561	121.043.378	41.905.941	24	76
2005	180.663.331	54.494.224	126.169.107	42.874.811	24	76
2006	202.718.284	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
2012	283.782.414	91.307.486	192.474.928	38.712.247	14	86

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

In 2012 export shipments increased to 91.3 million tons, import shipments increased to 192 million tons when compared with the previous year. The share of Turkish flag vessels transporting foreign trade cargoes have been realized as 14 % on the average.

As a whole, the share of the Turkish flag vessels transporting foreign trade cargoes between 2002-2012 have been realized as 20.27 % on the average.

GRAPH (24): Development of the Seaborne Trade (Tons)



The transportation of foreign trade cargoes; 14 % of the import transportation totalling **192.4** million tons have been carried by Turkish flag vessels. 13 % of the

export transportation totalling 91.3 million tons have been carried by Turkish flag vessels.

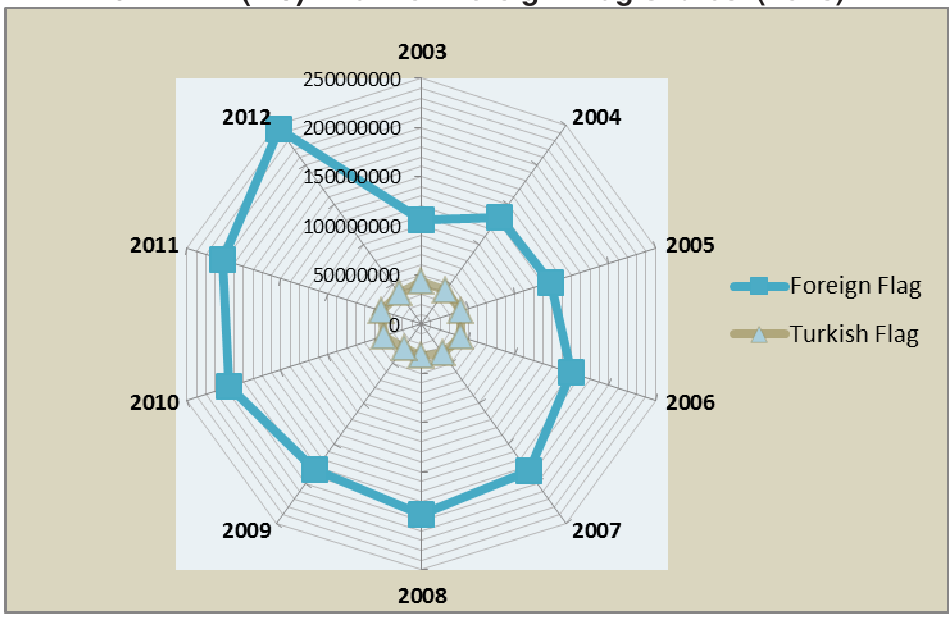
TABLE (30) : Foreign Trade Transportation by Flags

	Turkish Flag				Foreign Flag				Total	
Years	TF Import	%	TF Export	%	FF Import	%	FF Export	%	TF Seaborn Foreign Trade	FF Seaborn Foreign Trade
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
2012	26.476.350	14	12.235.897	13	165.998.578	86	79.071.589	87	38.712.247	245.070.167

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

The transportation of seaborne foreign trade cargoes increased to 283.7 million tons when compared with 2012 (132 million tons). Import goods increased to 192 million tons, (89 million tons) export goods increased to 91 million tons (43 million tons) when compared with 2002 with the same period.

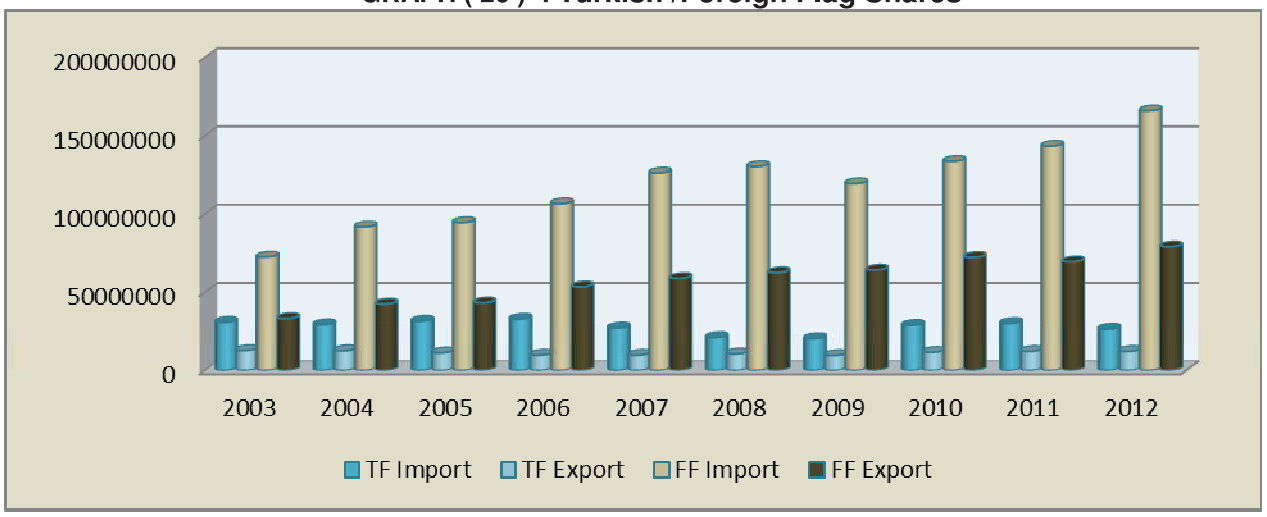
GRAPH (25): Turkish/Foreign Flag Shares (Tons)



The share of Turkish flag vessels, in total foreign trade transportation, in export basis decreased to 12.2 million tons and in Import basis decreased to 26.4 million tons in 2012, when compared with 12.8 and 30.8 million tons in 2003.

The share of Foreign flag vessels, in total foreign trade transportation, in export basis increased to 79 million tons and in Import basis increased to 166 million tons in 2012, when compared with 72.5 and 33.2 million tons in 2003.

GRAPH (26) : Turkish /Foreign Flag Shares



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 31 and 32.

The major segments of the exports goods in 2012, which realized totally as 91.3 million tons are 36.3 % Container, 25.4 % general cargo and 17.16 % dry bulk cargo. Major segments of the imported goods in 2012, which realized totally as 192 million tons are 39.3 % dry bulk cargo, 28 % liquid bulk cargo and 15.5 % Container.

TABLE (31) : BY TYPES CARGO HANDLING EXPORT AND TRANSIT

BY TYPES CARGO HANDLING EXPORT AND TRANSIT					
	EXPORT				
Cargo Types	Turkish Flag	Foreign Flag	Total Export	Transit Loading	Export+Transit
Dry Bulk Cargo	2.501.656	13.173.376	15.675.032	24.999	15.700.031
General Cargo	2.808.656	20.396.090	23.204.746	45.451	23.250.197
Liquid Bulk Cargo	531.840	14.755.983	15.287.823	44.937.348	60.225.171
Container	3.503.674	29.695.671	33.199.345	5.759.213	38.958.558
Vehicle	2.890.071	1.050.469	3.940.540	0	3.940.540
Total	12.235.897	79.071.589	91.307.486	50.767.011	142.074.497

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

GRAPH (27): Export and Transit Loading by the Types of Cargoes

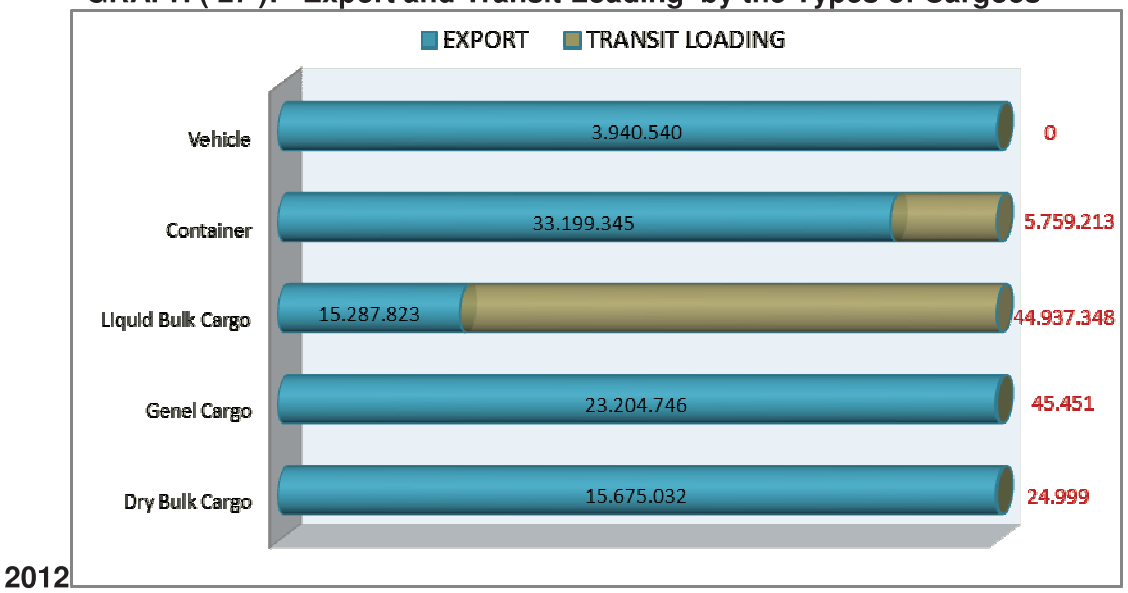


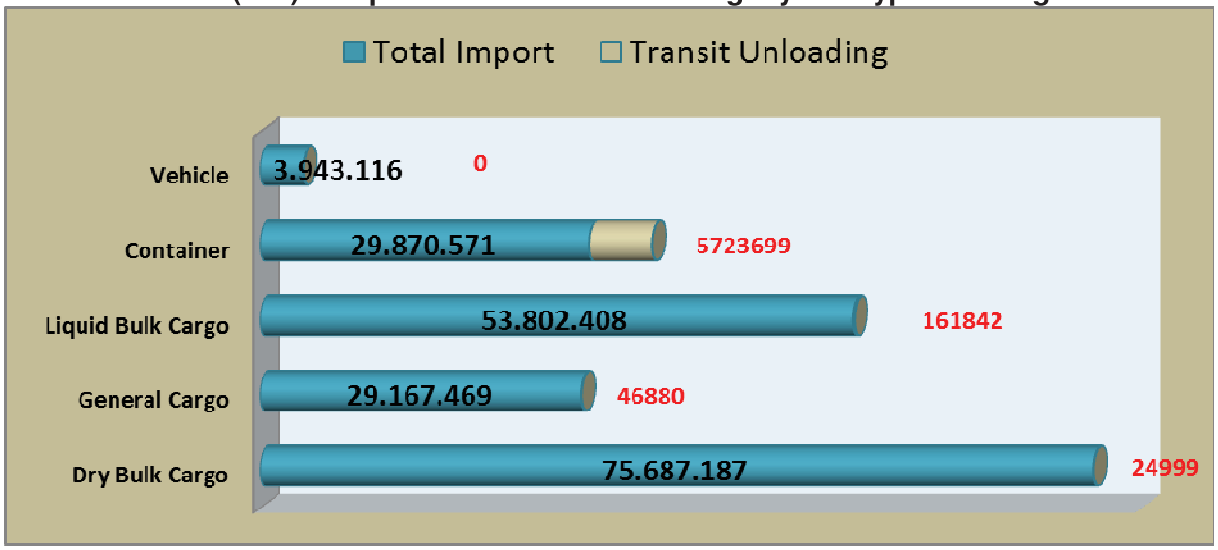
TABLE (32): Imports by the Types of Cargoes 2012

BY TYPES CARGO HANDLING IMPORT AND TRANSIT

	IMPORT				
Cargo Types	Turkish Flag	Foreign Flag	Total Import	Transit Unloading	Import +Transit
Dry Bulk Cargo	6.487.595	69.199.592	75.687.187	24.999	75.712.186
General Cargo	4.636.674	24.530.795	29.167.469	46.880	29.214.349
Liquid Bulk Cargo	9.646.777	44.155.631	53.802.408	161.842	53.964.250
Container	2.422.839	27.447.732	29.870.571	5.723.699	35.594.270
Vehicle	3.280.465	662.651	3.943.116	0	3.943.116
Total	26.476.350	165.998.578	192.474.928	5.957.420	198.432.348

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

GRAPH (28): Import and Transit Unloading by the Types of Cargoes



The Progress In Seaborne Trade by Country Groups

In the year 2012, 37.4 million tons of export and 69.2 million tons of import, totally 106.6 million tons of transportation have been realized to the OECD countries. Table 33 and 34 shows the export and import values to the OECD countries.

TABLE (33) : Seaborne Trade to OECD Countries Tons (2012)

LOADING					
OECD Country	Export Turkish Flag	Export Foreign Flag	Total Export	Transit Loaing	Total Loading
Italy	4.094.776	5.159.617	9.254.393	20.613.077	29.867.470
U.S.A.	137.131	4.393.865	4.530.996	5.348.034	9.879.030
Spain	880.950	4.100.879	4.981.829	2.391.152	7.372.981
Greece	463.943	4.431.094	4.895.037	431.908	5.326.945
France	372.702	1.357.581	1.730.283	3.278.942	5.009.225
Belgium	52.582	3.958.242	4.010.824	425.687	4.436.511
Israel	537.019	3.361.803	3.898.822	139.534	4.038.356
Canada	0	367.263	367.263	1.945.000	2.312.263
U.K.	30.565	1.186.800	1.217.365	881.340	2.098.705
S.Korea	0	301.004	301.004	1.543.371	1.844.375
Holland	23.058	937.883	960.941	733.688	1.694.629
Portugal	2.901	122.076	124.977	714.486	839.463
Sweden	0	444.053	444.053	0	444.053
Germany	1.800	294.818	296.618	15.004	311.622
Poland	0	227.899	227.899	14	227.913
Australia	0	1.053	1.053	130.000	131.053
Irland	2.100	39.126	41.226	0	41.226
Finland	0	39.261	39.261	0	39.261
Iceland	0	37.360	37.360	0	37.360
Denmark	0	34.096	34.096	0	34.096
Norway	0	34.028	34.028	0	34.028
Mexico	0	23.864	23.864	4.715	28.579
Japan	0	14.836	14.836	0	14.836
Total	6.599.527	30.853.665	37.468.028	38.595.952	76.049.144

***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 39.3 %, U.S.A. 13 %, Spain 9.7 % shares.

TABLE (34) : Seaborne Trade to OECD Countries Tons(2012)

UNLOADING					
OECD Country	Import Turkish Flag	Import Foreign Flag	Total Import	Transit Unloaing	Total Unloading
U.S.A.	1.017.938	16.004.049	17.021.987	49.478	17.071.465
Italy	3.589.693	6.047.860	9.637.553	158.423	9.795.976
Greece	608.948	5.950.849	6.559.797	355.175	6.914.972
Belgium	36.954	5.566.811	5.603.765	450.783	6.054.548
Spain	263.249	3.712.734	3.975.983	562.517	4.538.500
Israel	208.292	3.812.679	4.020.971	23.927	4.044.898
U.K.	87.372	3.766.046	3.853.418	9.032	3.862.450
Holland	34.527	3.499.901	3.534.428	105.609	3.640.037
France	647.850	2.843.498	3.491.348	2.166	3.493.514
Germany	69.286	2.469.465	2.538.751	10.851	2.549.602
Norway	2.000	2.001.830	2.003.830	0	2.003.830
Canada	84.080	1.913.940	1.998.020	4.824	2.002.844
Australia	0	1.746.067	1.746.067	0	1.746.067
Finland	0	690.774	690.774	0	690.774
Sweden	2.011	595.032	597.043	0	597.043
Japan	55.555	427.233	482.788	0	482.788
Denmark	0	436.071	436.071	0	436.071
Portugal	23.256	292.442	315.698	19.247	334.945
S.Korea	0	298.551	298.551	16.121	314.672
Poland	2.006	226.013	228.019	0	228.019
Mexico	58.000	131.994	189.994	0	189.994
Irland	0	7.986	7.986	0	7.986
Iceland	0	0	0	0	0
Total	6.791.017	62.441.825	69.232.842	1.768.153	71.000.995

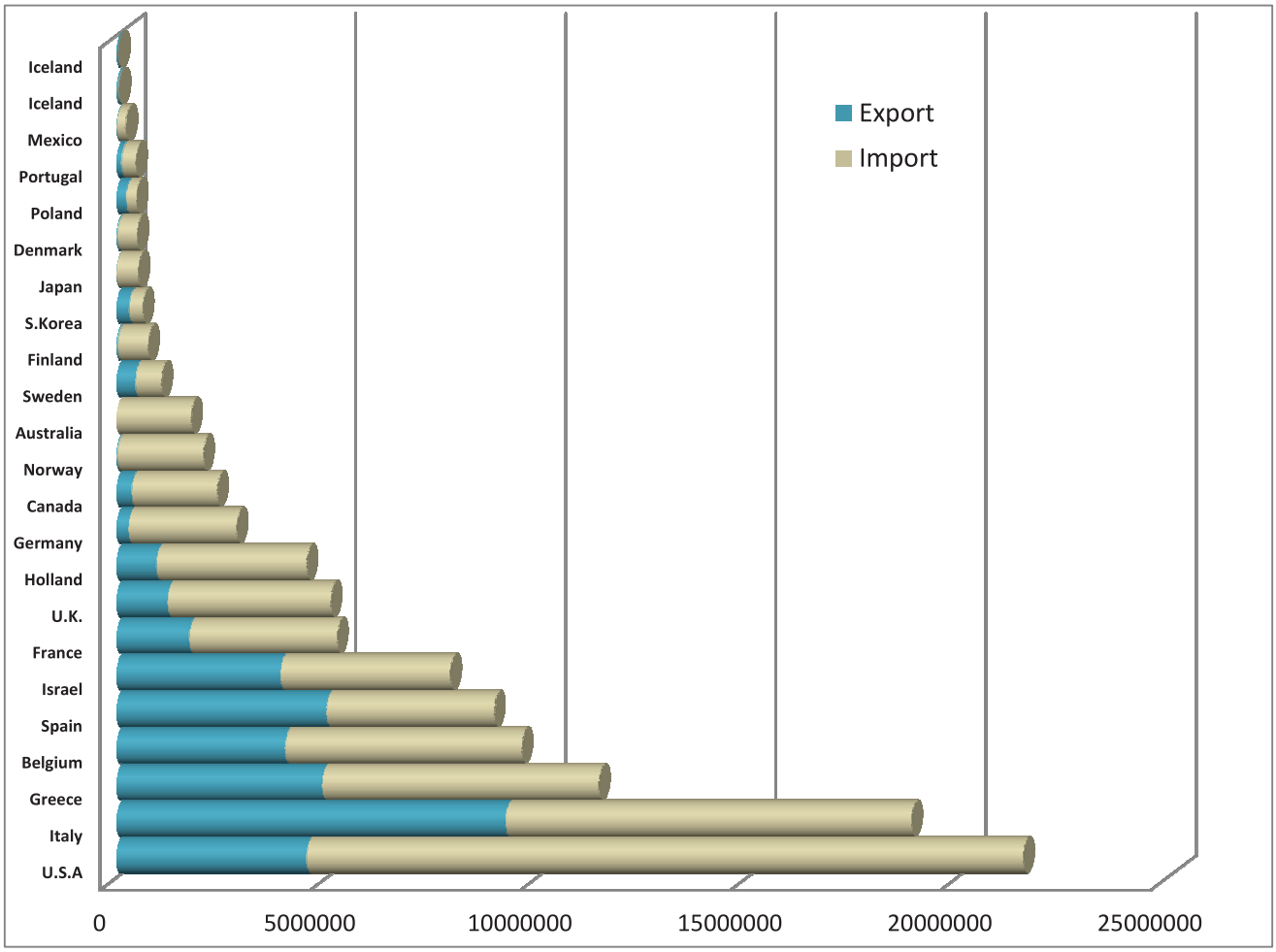
***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

Among OECD countries, the first three that Turkey imports from / that conducts transit unloading in Turkey are U.S.A. (24%), Italy (13.8%) and Greece (9.7%).

In the year of 2012, the seaborne trade volume between Turkey and the OECD countries was 147.050.139 metric tons. 106.7 million metric tons of this amount was import –export while 41 million metric tons was transit cargoes.

The seaborne trade share of the Turkish flag vessels was 12.4 % and foreign flag vessels' was 87.6%.

GRAPH (29): Seaborne Trade to OECD Countries (2012)



In the year 2012, 33.9 million tons of export and 45.9 million tons of import, totally 53.3 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 46.6 %, Spain with 11.5 %, Greece with 8.5 % shares.

The first 3 major countries as Turkey's import & transit unloading foreign trade partners among EU countries are Italy with 17.4 %, Greece 12.3 % and Belgium 10.7 % shares.

TABLE (35): Seaborne Trade to EU Countries (mton)(2012)

	LOADING				
EU Countries	Export Turkish Flag	Export Foreign Flag	Total Export	Transit Loading	Total Loading
Italy	4.094.776	5.159.617	9.254.393	20.613.077	29.867.470
Spain	880.950	4.100.879	4.981.829	2.391.152	7.372.981
Greece	463.943	4.431.094	4.895.037	431.908	5.326.945
France	372.702	1.357.581	1.730.283	3.278.942	5.009.225
Belgium	52.582	3.958.242	4.010.824	425.687	4.436.511
Malta	10.524	3.499.692	3.510.216	36.500	3.546.716
U.K.	30.565	1.186.800	1.217.365	881.340	2.098.705
Romania	291.570	1.319.460	1.611.030	179.131	1.790.161
Holland	23.058	937.883	960.941	733.688	1.694.629
Portugal	2.901	122.076	124.977	714.486	839.463
Bulgaria	96.860	270.963	367.823	468.974	836.797
Sweden	0	444.053	444.053	0	444.053
Germany	1.800	294.818	296.618	15.004	311.622
Poland	0	227.899	227.899	14	227.913
Slovenia	144.360	52.465	196.825	1.930	198.755
Ireland	2.100	39.126	41.226	0	41.226
Finland	0	39.261	39.261	0	39.261
Denmark	0	34.096	34.096	0	34.096
Lithuanian	0	21.273	21.273	0	21.273
Latvia	0	6.051	6.051	0	6.051
Estonia	0	0	0	0	0
S.Cyprus	0	0	0	0	0
Austria	0	0	0	0	0
Czech Rep.	0	0	0	0	0
Luxembourg	0	0	0	0	0
Hungary	0	0	0	0	0
Slovekian	0	0	0	0	0
Total	6.468.691	27.503.329	33.972.020	30.171.833	64.143.853

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

GRAPH (30): Seaborne Trade to EU Countries Tons (2012)

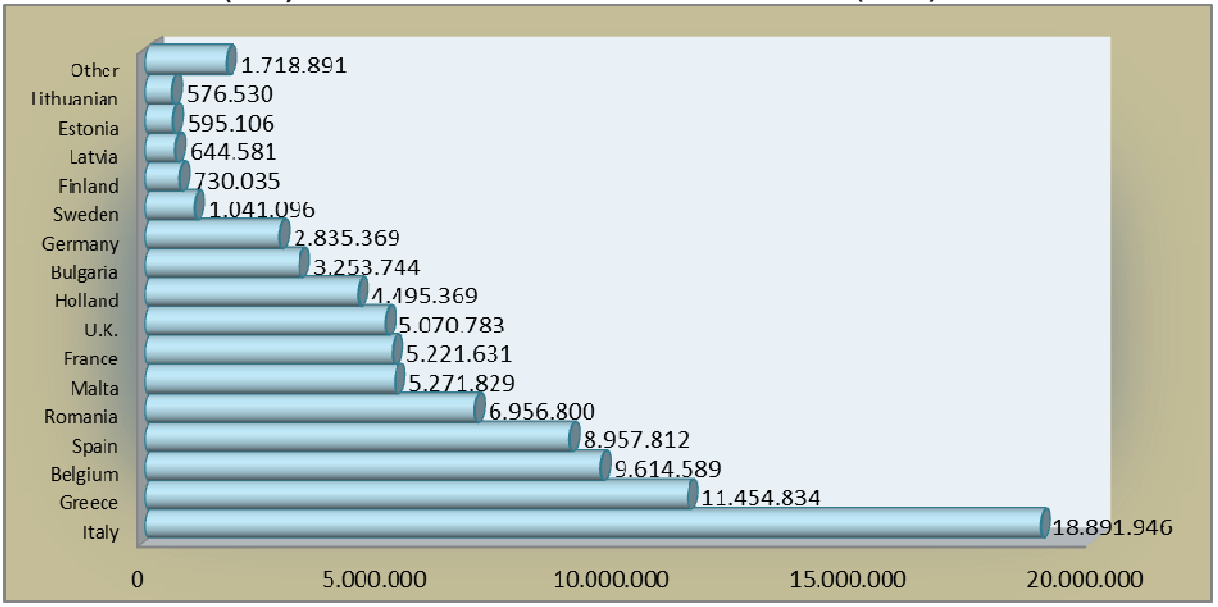


TABLE (36): Seaborne Trade to EU Countries (mton)(2012)

	UNLOADING				
EU Countries	Import Turkish Flag	Import Foreign Flag	Total Import	Transit Unloading	Total Unloading
Italy	3.589.693	6.047.860	9.637.553	158.423	9.795.976
Greece	608.948	5.950.849	6.559.797	355.175	6.914.972
Belgum	36.954	5.566.811	5.603.765	450.783	6.054.548
Romania	1.461.522	3.884.248	5.345.770	601.350	5.947.120
Spain	263.249	3.712.734	3.975.983	562.517	4.538.500
U.K.	87.372	3.766.046	3.853.418	9.032	3.862.450
Holland	34.527	3.499.901	3.534.428	105.609	3.640.037
France	647.850	2.843.498	3.491.348	2.166	3.493.514
Bulgaria	641.432	2.244.489	2.885.921	573.120	3.459.041
Germany	69.286	2.469.465	2.538.751	10.851	2.549.602
Malta	20.372	1.741.241	1.761.613	2.856	1.764.469
Finland	0	690.774	690.774	0	690.774
Latvia	3.144	635.386	638.530	0	638.530
Sweden	2.011	595.032	597.043	0	597.043
Estonia	45.010	550.096	595.106	0	595.106
Lithuanian	35.869	519.388	555.257	0	555.257
Denmark	0	436.071	436.071	0	436.071
Portugal	23.256	292.442	315.698	19.247	334.945
Poland	2.006	226.013	228.019	0	228.019
Slovenia	21.011	85.072	106.083	0	106.083
Ireland	0	7.986	7.986	0	7.986
S.Cypres	0	11	11	0	11
Austria	0	0	0	0	0
Czech Rep.	0	0	0	0	0
Luxemburg	0	0	0	0	0
Hungary	0	0	0	0	0
Slovekian	0	0	0	0	0
Total	**7.593.512**	**45.765.413**	**53.358.925**	**2.851.129**	**56.210.054**

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

In the year 2012, 15.8 million tons of export and 65 million tons of import, totally 80.8 million tons seaborne transportation have been realized to the BSEC countries.

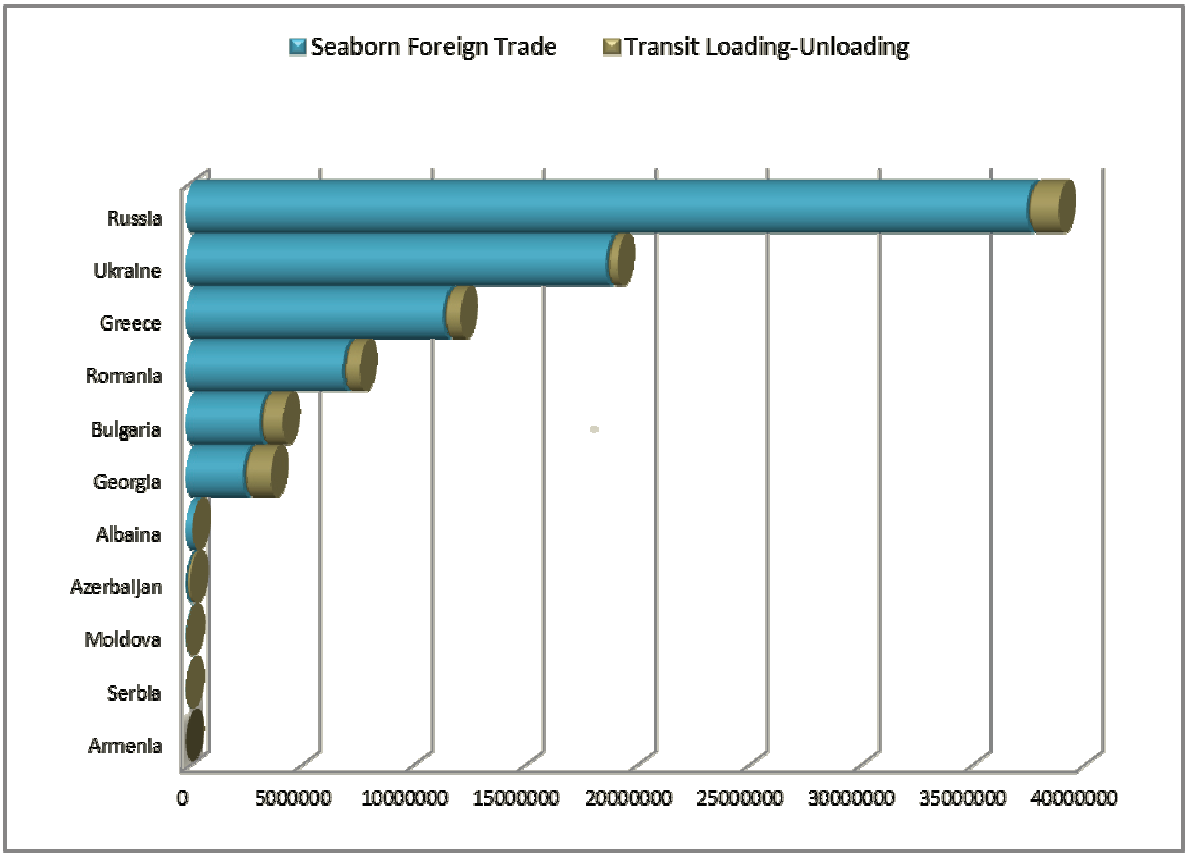
The first 3 major countries as Turkey's export & transit loading foreign trade partners among BSEC countries are Russia with 36.1 %, Greece with 27.7 %, Georgia with 11.8 % shares.

TABLE (37) : Seaborne Trade to BSEC Countries (Tons) 2012

	LOADING				
BSEC Countries	**Export Turkish Flag**	**Export Foreign Flag**	**Total Export**	**Transit Loading**	**Total Loading**
Russia	743.662	5.193.355	5.937.017	1.026.146	6.963.163
Greece	463.943	4.431.094	4.895.037	431.908	5.326.945
Georgia	551.572	638.744	1.190.316	1.089.883	2.280.199
Ukraine	379.624	1.313.029	1.692.653	117.320	1.809.973
Romania	291.570	1.319.460	1.611.030	179.131	1.790.161
Bulgaria	96.860	270.963	367.823	468.974	836.797
Albaina	36.068	99.146	135.214	0	135.214
Azerbaijan	3.768	14.900	18.668	89.756	108.424
Moldova	0	5.738	5.738	0	5.738
Serbia	0	0	0	0	0
Armenia	0	0	0	0	0
Total	**2.567.067**	**13.286.429**	**15.853.496**	**3.403.118**	**19.256.614**

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

GRAPH (31) : Seaborne Trade and Transit Loading-Unloading to BSEC Countries



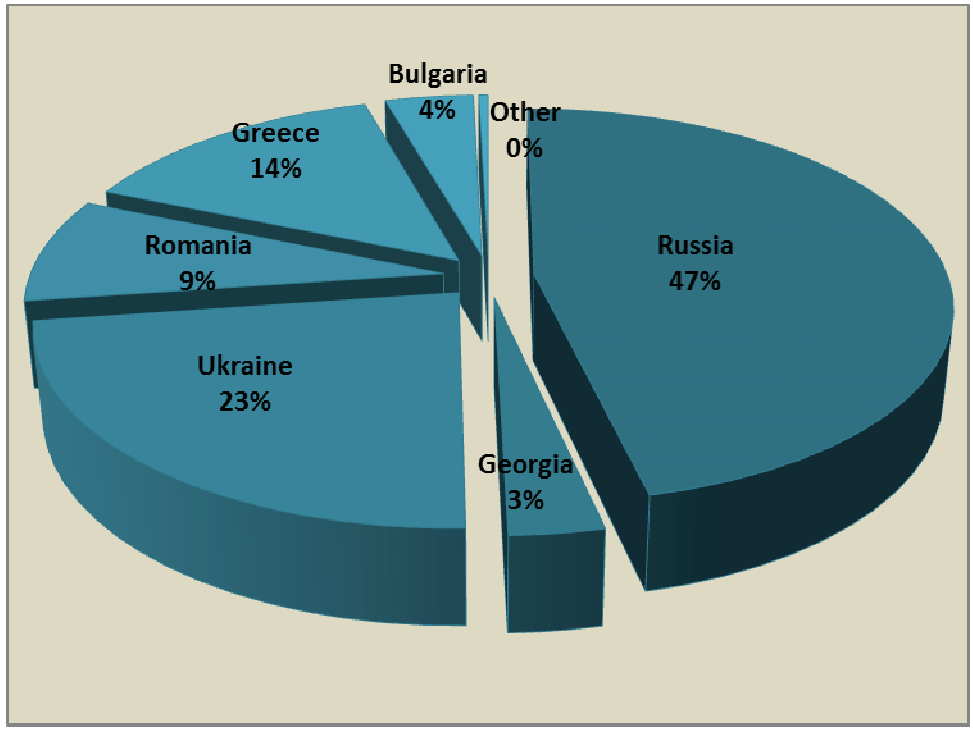
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among BSEC countries are Russia with 47.4 %, Ukranie with 25.8 % and Greece with 10.2 % shares.

TABLE (38): Seaborne Trade to BSEC Contries (Tons)

UNLOADING					
BSEC Countries	Import Turkish Flag	Import Foreign Flag	Total Import	Transit Unloading	Total Unloading
Russia	3.433.950	28.192.646	31.626.596	411.309	32.037.905
Ukraine	4.727.914	12.308.512	17.036.426	417.785	17.454.211
Greece	608.948	5.950.849	6.559.797	355.175	6.914.972
Romania	1.461.522	3.884.248	5.345.770	601.350	5.947.120
Bulgaria	641.432	2.244.489	2.885.921	573.120	3.459.041
Georgia	474.209	858.133	1.332.342	150.440	1.482.782
Albaina	14.420	135.089	149.509	0	149.509
Azerbaijan	0	0	0	84.000	84.000
Moldova	0	22.186	22.186	0	22.186
Serbia	10.465	0	10.465	0	10.465
Armenia	0	0	0	0	0
Total	11.372.860	53.596.152	64.969.012	2.593.179	67.562.191

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

GRAPH (32): 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) shows that at the beginning of 2012, 69.3 per cent of the container capacity was not registered in the country of domicile of the owner, but flagged out.

TABLE (39) : World Full Container Fleet by Country of Domicile (1000 grt and over)

TEU Rank	Countries	National Flag				International Flag				Total Fleet Controlled			
		No	1000 DWT	1000 TEU	Av. Age	No	1000 DWT	1000 TEU	Av.Age	No	1000 DWT	1000 TEU	Av. Age
1	Germany	285	15.716	1231	10.0	1.518	49.713	3837	8.3	1.803	65.429	5068	8.6
2	Japan	2	104	9	9.2	311	14.719	1179	6.8	313	14.823	1189	6.8
3	Denmark	92	7.218	585	9.9	138	7.377	544	8.3	230	14.595	1129	8.9
4	Greece	35	2.491	197	13.2	200	8.958	684	12.7	235	11.449	881	12.8
5	Chine	185	5.918	429	15.7	134	5.148	416	11.5	319	11.066	845	13.9
6	U.K.	60	4.035	338	8.5	55	3.792	318	8.6	115	7.827	656	8.6
7	France	26	2.148	176	5.4	85	5.526	451	6.5	111	7.674	626	6.3
8	Taiwan	28	722	53	14.5	159	6.694	535	10.1	187	7.417	588	10.7
9	Kore Ref. Of	71	977	68	14.7	71	4.666	369	7.0	142	5.643	437	10.9
10	Singapore	128	4.117	303	9.6	31	1.006	76	11.5	159	5.123	379	9.9
11	Canada	2	17	1	23.6	60	3.960	329	5.2	62	3.977	330	5.8
12	U.S.	47	1.788	133	25.0	45	1.590	117	12.5	92	3.378	250	18.9
13	Hong Kong	47	2.488	203	6.6	11	282	21	11.6	58	2.771	224	7.5
14	Israel	5	297	23	5.4	34	2.054	157	10.0	39	2.361	181	9.4
15	Kuwait	6	292	21	19.3	22	1.350	105	13.8	28	1.642	126	15.0
16	S.Cypres	5	139	10	8.7	33	1.072	76	6.4	38	1.211	87	6.7
17	Chile	2	30	2	12.6	13	999	82	3.3	15	1.029	84	4.6
18	Turkey	39	674	50	10.3	25	338	27	8.7	64	1.013	77	9.6
19	Indonesia	105	969	60	18.9	8	151	10	12.7	113	1.119	70	18.4
20	Sweden	3	118	8	6.7	20	702	56	10.4	23	820	64	9.9
	World Total	1.173	50.258	3900		2.973	120.097	9389		4.146	170.367	13291	

Source : ISL May/June 2012

As regards the owner countries, German ship owners controlled by far the largest part of the world container fleet, namely 5 mill. TEU (1.803 container vessels) followed by Japan 1.1 mill TEU (313 container vessels) and Denmark 1.1 mill TEU (230 container vessels).

Container handling in Turkey in the years 2003 and 2012 are shown in Table 41 below on the basis of public and private sectors.

When the container transportations in 2012 is examined as cabotage, exports, imports and transit cargoes; on the basis of TEU, exports became 2.8 million TEU, imports 2.9 million TEU, cabotage loading-unloading 472.345 TEU and transit 898.368 TEU.

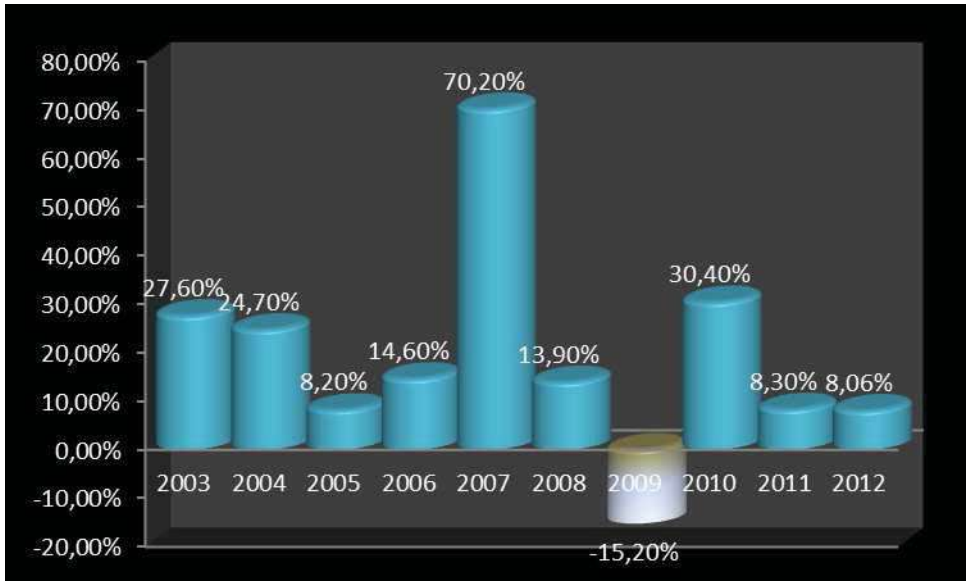
Transportation volume of Turkey's container transports by sea way was 2.4 million TEU in 2003; in 2012 it became 6.7 million TEU, at the same period imports cargoes increased to 2.9 million TEU from 1.1 million TEU and the exports cargoes increased to 2.8 million TEU when compared with 1.1million TEU in 2003.

TABLE (40) : Container Handling 2003-2012 (TEU)

	Loading (TEU)			Unloading (TEU)			Seaborn Foreign Trade			Change
Years	Cabotage	Export	Total	Cabotage2	Import	Total2	Foreign Trade	Transit	Total3	%
2003	58.766	1.174.016	1.232.782	39.072	1.110.670	1.149.742	2.382.524	110	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	70.2%
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	8,30%
2012	236.905	2.879.122	3.116.027	235.440	2.942.562	3.178.001	5.821.683	898.368	6.720.051	8,06%

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

Graph (33): 2003-2012 Container Handling Change(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 (41) : Position at the 18 Ports- Loading Container Handling (TEU) 2012

	LOADING											
	Export			Cabotage Loading			Transit Loading			Total Loading		
Port	No	TEU	TONS	NO	TEU	TON	NO	TEU	TON	ADET	TEU	TON
AMBARLI	1.174.632	1.882.412	17.181.732	137.362	199.634	1.486.194	604.912	911.254	11.438.364	1.916.906	2.993.299	30.106.290
MERSİN	780.306	1.188.962	14.357.992	27.048	45.822	375.282	1.386	1.974	25.496	808.740	1.236.758	14.758.770
GEMLİK	416.984	626.438	7.661.028	45.702	65.849	832.928	1.532	1.998	25.836	464.218	694.285	8.519.792
İZMİR	470.858	655.503	8.826.702	10.902	15.024	203.356	2	2	30	481.762	670.529	9.030.088
KOCAELİ	363.720	592.531	6.199.752	35.788	45.224	156.870	0	0	0	399.508	637.755	6.356.622
ALİAĞA	295.318	420.386	5.614.176	4.100	6.620	87.076	1.814	2.926	28.216	301.232	429.932	5.729.468
ANTALYA	170.320	180.230	4.238.416	2.036	2.062	50.060	0	0	0	172.356	182.292	4.288.476
İSTANBUL	79.006	125.630	739.904	20.804	28.936	85.650	0	0	0	99.810	154.566	825.554
İSKENDERUN	64.772	80.515	1.492.736	0	0	0	84	168	356	64.856	80.683	1.493.092
TRABZON	3.314	3.898	73.722	22.816	25.634	590.092	0	0	0	26.130	29.532	663.814
SAMSUN	0	0	0	25.356	26.840	570.918	0	0	0	25.356	26.840	570.918
BANDIRMA	16	26	210	9.118	9.126	249.932	0	0	0	9.134	9.152	250.142
BARTIN	10	20	108	2.290	2.290	39.760	0	0	0	2.300	2.310	39.868
TEKİRDAĞ	880	1.678	12.156	0	0	0	0	0	0	880	1.678	12.156
RİZE	0	0	0	604	604	16.508	0	0	0	604	604	16.508
KARABİGA	0	0	0	146	146	380	0	0	0	146	146	380
HOPA	0	0	0	0	0	0	8	16	128	8	16	128
ZONGULDAK	14	16	56	0	0	0	0	0	0	14	16	56
TOTAL	3.820.150	5.758.243	66.398.690	344.072	473.811	4.745.006	609.738	918.338	11.518.426	4.773.960	7.150.392	82.662.122

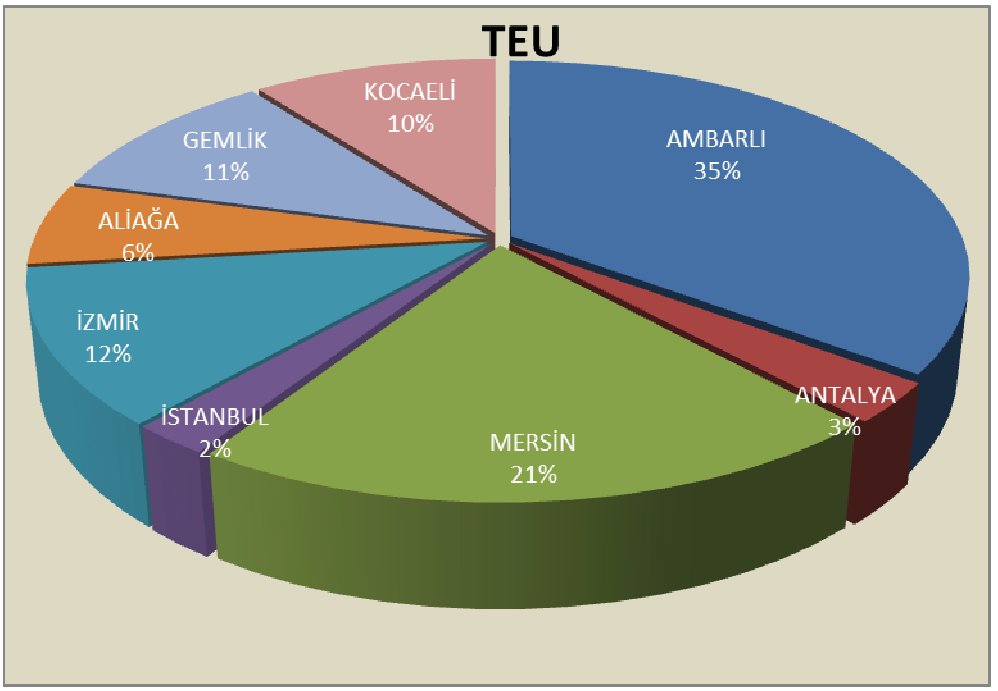
Source: Republic of Turkey Ministry of Transport, Maritime Affairs and Communications

TABLE (42) : Position at the 18 Ports- Unloading Container Handling (TEU) 2012

	UNLOADING											
	Import			Cabotage Unloading			Transit Unloading			Total Unloading		
Port	No	TEU	TON	NO	TEU	TON	NO	TEU	TON	ADET	TEU	TON
AMBARLI	1.272.362	2.026.194	20.542.130	133.820	174.421	2.624.804	553.506	854.006	11.135.334	1.959.688	3.054.621	34.302.268
MERSİN	789.054	1.207.816	17.437.454	21.976	37.352	395.234	11.792	19.820	264.946	822.822	1.264.988	18.097.634
İZMİR	479.446	669.932	4.823.500	34.744	51.136	197.600	0	0	0	514.190	721.068	5.021.100
GEMLİK	393.910	600.502	4.429.718	53.212	76.221	537.874	1.120	1.482	18.672	448.242	678.205	4.986.264
KOCAELİ	375.986	593.548	7.017.390	17.504	29.002	241.250	0	0	0	393.490	622.550	7.258.640
ALİAĞA	241.422	356.758	2.149.058	27.618	37.614	85.486	1.758	2.842	26.920	270.798	397.214	2.261.464
ANTALYA	162.224	174.062	717.042	2.268	2.348	5.068	0	0	0	164.492	176.410	722.110
İSTANBUL	89.286	134.632	1.692.926	18.522	28.206	334.328	0	0	0	107.808	162.838	2.027.254
İSKENDERUN	68.074	85.700	620.942	0	0	0	16	32	84	68.090	85.732	621.026
TRABZON	21.562	21.970	130.962	4.198	5.982	75.270	0	0	0	25.760	27.952	206.232
SAMSUN	12.692	13.130	144.370	13.674	14.636	237.472	0	0	0	26.366	27.766	381.842
BANDIRMA	0	0	0	10.236	10.236	22.518	0	0	0	10.236	10.236	22.518
BARTIN	0	0	0	2.180	2.180	6.456	0	0	0	2.180	2.180	6.456
TEKİRDAĞ	418	847	4.508	370	728	1.722	0	0	0	788	1.575	6.230
RİZE	0	0	0	604	604	1.292	0	0	0	604	604	1.292
HOPA	8	16	32	0	0	0	108	216	1.442	116	232	1.474
KARABİGA	0	0	0	210	214	4.796	0	0	0	210	214	4.796
ZONGULDAK	14	16	32.024	0	0	0	0	0	0	14	16	32.024
TOTAL	3.906.458	5.885.124	59.742.056	341.136	470.880	4.771.170	568.300	878.398	11.447.398	4.815.894	7.234.401	75.960.624

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

Graph (34) : Position at the 8 Ports Container Handling (TEU %) 2012



As of 2012, the countries which Turkey performed foreign trade with / conducted transit container transportation are as follows: Egypt (16.7%), Belgium (9.8%) and Greece (9.4%). The data of the foreign trade / transit container transportation of top 16 countries are shown in the Table 43.

TABLE (43) : Position at the 20 Country Container Foreign Trade Handling (TEU) 2011

		TEU								
Rank	Countries	Export	Transit Loading	Export+ Transit	Import	Transit Unloading	Import+ Transit Unloading	Export / Import	Loading / Unloading Transit	Total
1	Egypt	510.773	46.882	557.655	514.058	51.259	565.317	1.024.832	98.141	1.122.973
2	Belgium	298.418	38.645	337.063	283.291	39.539	322.830	581.709	78.184	659.893
3	Greece	263.332	6.291	269.623	333.622	28.358	361.980	596.954	34.649	631.603
4	Italy	259.556	7.218	266.774	226.463	11.627	238.090	486.019	18.845	504.864
5	Chine	195.617	15.813	211.430	195.021	67.386	262.407	390.638	83.199	473.837
6	Spain	268.064	21.882	289.946	113.875	41.530	155.405	381.939	63.412	445.351
7	Israel	173.821	3.823	177.643	230.411	2.003	232.414	404.232	5.826	410.058
8	Russia	96.893	84.223	181.116	97.772	32.387	130.159	194.665	116.610	311.275
9	Georgia	56.235	91.692	147.927	120.557	10.385	130.942	176.792	102.077	278.869
10	Malta	131.463	0	131.463	135.033	194	135.227	266.496	194	266.690
11	Lubenan	61.063	466	61.529	108.055	139	108.194	169.118	605	169.723
12	Romania	65.777	13.644	79.421	30.507	49.345	79.852	96.284	62.989	159.273
13	Libya	59.964	5.792	65.756	78.199	384	78.583	138.163	6.176	144.339
14	Malaysia	4.559	3.062	7.621	116.224	9.744	125.968	120.783	12.806	133.589
15	Ukrania	24.301	9.273	33.574	56.974	24.801	81.775	81.275	34.074	115.349
16	Syria	10.064	485	10.549	97.534	162	97.696	107.598	647	108.245
	Other	399.222	109.978	509.200	204.966	69.956	274.922	604.188	179.934	784.122
	TOTAL	2.879.122	459.169	3.338.291	2.942.562	439.199	3.381.761	5.821.683	898.368	6.720.051

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

Vehicle Transportation through Ro-Ro Lines

There were 26 Ro-Ro ships in the Turkish Merchant Fleet at the end of 2011with a capacity of 237.697 DWT. (530.967 GRT.)

Ro-Ro lines of Turkey in 2006-2012 are shown below.

TABLE (44): Ro-Ro Lines Transported Vehicles (2006- 2012)

Region	Ro-Ro Lines	2006	2007	2008	2009	2010	2011	2012
Marmara	Pendik/Haydarpaşa-Trieste	119,088	160,203	149,062	111,401	116,815	139.270	121.742
	Ambarlı-Trieste	38,954	41,085	39,998	30,372	37,627	18.017	15.618
	Ambarlı-Toulen						0	37.505
	Pendik/Haydarpaşa-Marseille	0	0	0	0	7480	2.130	0
	Tekirdağ-Toulon	0	0	0	0	9269	0	0
	Haydarpaşa-Odessa	0	0	0	0	0	0	0
	Haydarpaşa-Yuzhnyy	0	0	0	0	0	0	0
	Tekirdağ-Trieste							0
	Bölge Toplamı	**158,042**	**201,288**	**189060**	**141,773**	**171,191**	**159.417**	**174.865**
Mediterrenean	Taşucu-Girne	35560	33,393	32,305	31,032	36,071	36.316	34.168
	Mersin-Magosa	13,488	12,938	23,766	19,966	19,107	18.275	14.669
	Mersin-Trieste	0	0	0	12019	28,571	37.093	39.748
	İskenderun-Port Said							5.673
	Mersin-İskenderiye	0	0	0	0	0	253	790
	Regional total	**49,048**	**46,331**	**56,071**	**63,017**	**84,638**	**91.937**	**95.048**
Aegean	Çeşme-Trieste	30,889	36,717	30,039	24,808	27,179	43.058	44.106
	İzmir-Dedeağaç	0	0	0	0	0	0	0
	Bölge Toplamı	**30,889**	**36,717**	**30,039**	**24,808**	**27,179**	**43.058**	**44.106**
Blacksea	Zonguldak-Ukrania	19,147	27,099	23,632	20,476	19,573	23.540	25.126
	Samsun-Novorossisky	27120	29,598	21,148	9280	15,145	10.742	7.670
	Samsun-Kavkaz	0	0	0	0	0	1.383	1.236
	Trabzon-Sochi	6,574	7180	10150	7,066	5,078	637	518
	Pize-Poti	742	0	0	0	0	0	0
	Regional Total	**53,583**	**63,877**	**54930**	**36,822**	**39,796**	**36.302**	**34.550**
Grand Total	Toplam	291,562	348,213	330.100	266.420	322.804	**330.714**	**348.569**

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

Table 44 above shows the amounts of the transported full vehicles (export and import) in the years 2006-2012.

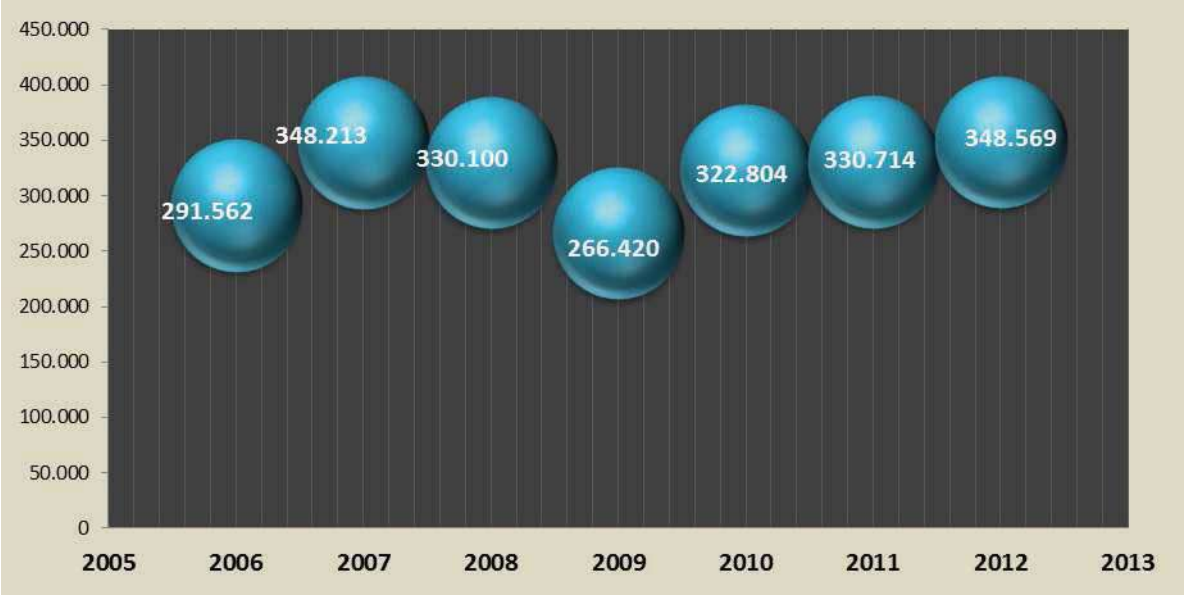
In The Black Sea region; 518 vehicles on Trabzon-Soçhi line, 7.670 vehicles on Samsun-Novorossisky line, 1236 vehicles on Samsun-Kavraz line and 25.126 vehicles on Zonguldak- Ukraine line, totally regional 34.569 vehicles have been transported in 2012.

In The Marmara Sea region; 15.618 vehicles have been carried on **Ambarlı-Trieste line**, 121.742 vehicles on **Pendik/Haydarpaşa-Trieste line**, 37.505 vehicles on **Ambarlı-Toulen line** totally regional 174.865 vehicles have been transported in 2012.

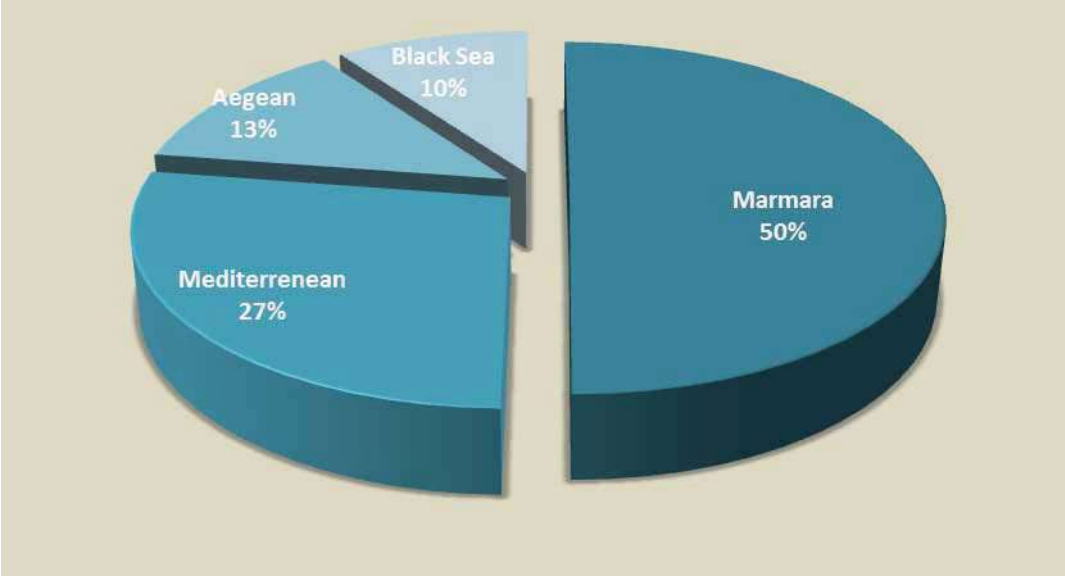
In The Aegean Sea region; 44.106 vehicles have been carried on **Çeşme-Trieste line**, totally regional 44.106 vehicles have been transported in 2012.

In The Mediterranean region; 34.168 vehicles have been carried on **Taşucu-Girne line**, 14.669 vehicles on **Mersin-Magosa line**, 39.748 vehicles have been carried on **Mersin-Trieste line,** 5.673 vehicles have been carried on **İskenderun-Port Said line, 790** vehicles have been carried on **Mersin-Iskenderiye line,** totally regional 95.048 vehicles have been transported in 2012.

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



GRAPH (36) : RO-RO Lines Transported Vehicles (2012)



The majority of the transported vehicles by Regions are, 50 % the Sea of Marmara Region, 10 % Black Sea Region, 27 % Mediterranean Region and 13 % The Aegean Sea Region in 2012.


SHIP BUILDING

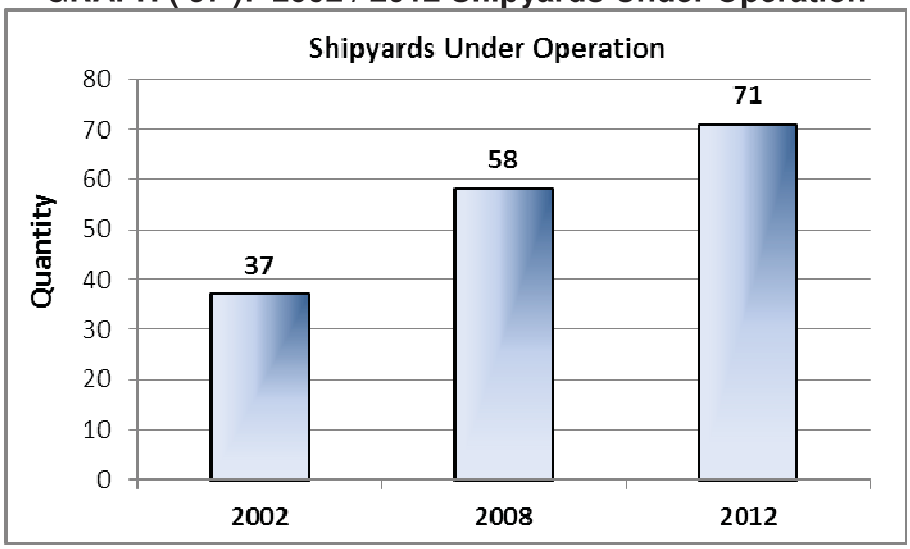
CHAPTER III

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 52 by the end of 2012.

GRAPH (37): 2002 / 2012 Shipyards Under Operation



Source: Ministry of Transport, Maritime Affairs and Communications

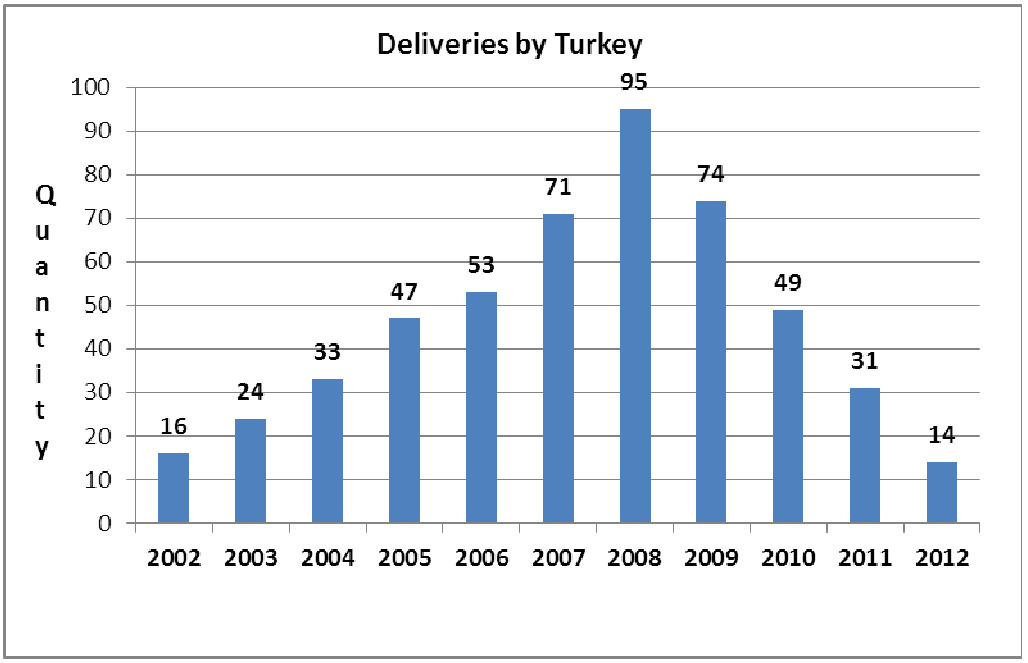
Shipbuilding industry is a branch of heavy industry which provides;

- 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.

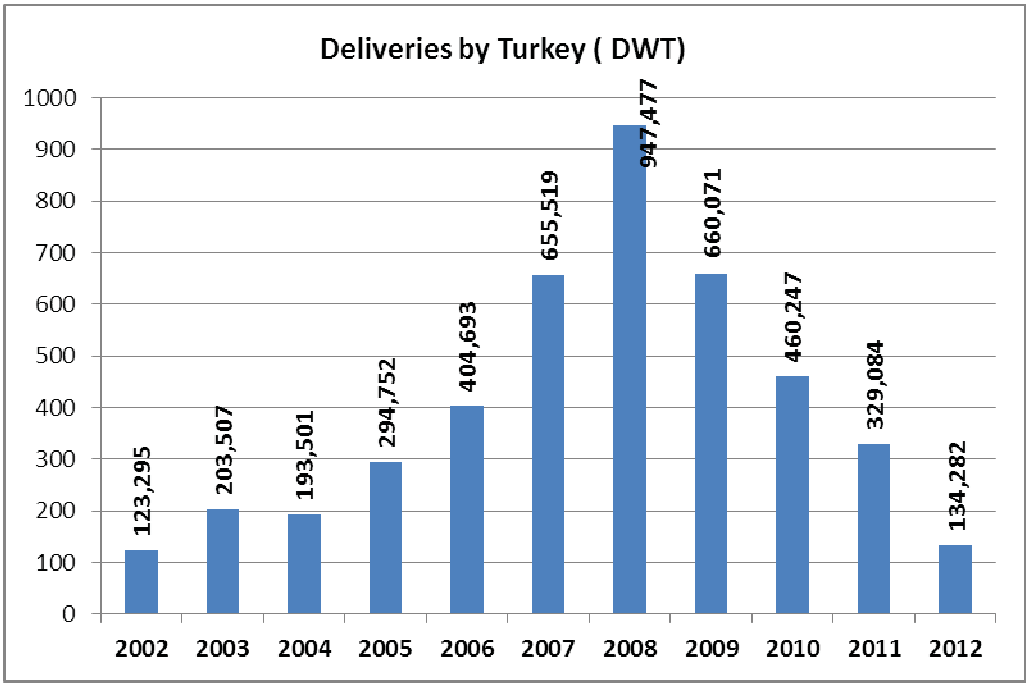
In 2012, 12 ships of 134.282 DWT have been delivered.

GRAPH (38) : Number of Ships Delivered Between 2002-2012



Source: Clarkson Research Services 01/2013

GRAPH (39): DWT of Ships Delivered Between 2002-2012

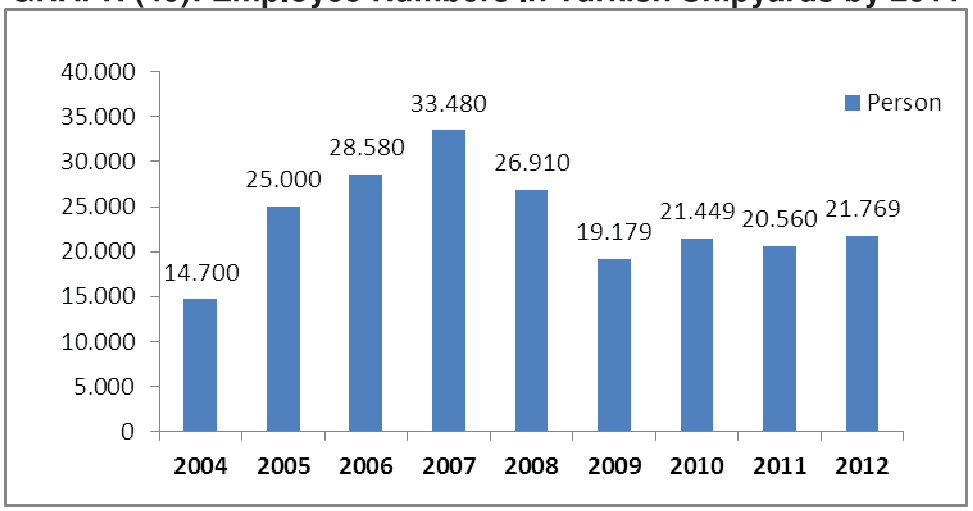


Source: Clarkson Research Services 01/2013

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, 52 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: Ministry of Transport, Maritime Affairs and Communications

TABLE (45): Shipyards Under Operation 2012

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 (46): Shipyards Distribution According to Cities

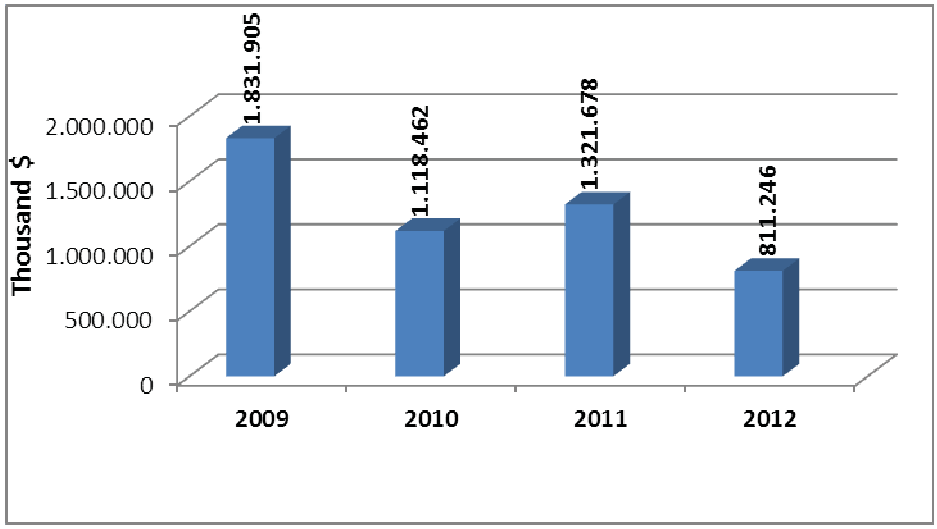
Shipyards Under Operation		Shipyards Under Construction	
İstanbul	27	Yalova	20
Yalova	21	Ordu	1
Trabzon	1	Samsun	8
Ordu	1	Kastamonu	3
Samsun	1	Çanakkale	6
Kastamonu	1	Adana	2
Zonguldak	8	Mersin	1
Sakarya	1	Balıkesir	2
İzmit	6	Sinop	1
Çanakkale	2	Zonguldak	3
Hatay	1	Trabzon	1
Adana	1	İstanbul (Proje)	4
TOPLAM	71	TOPLAM	52

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.

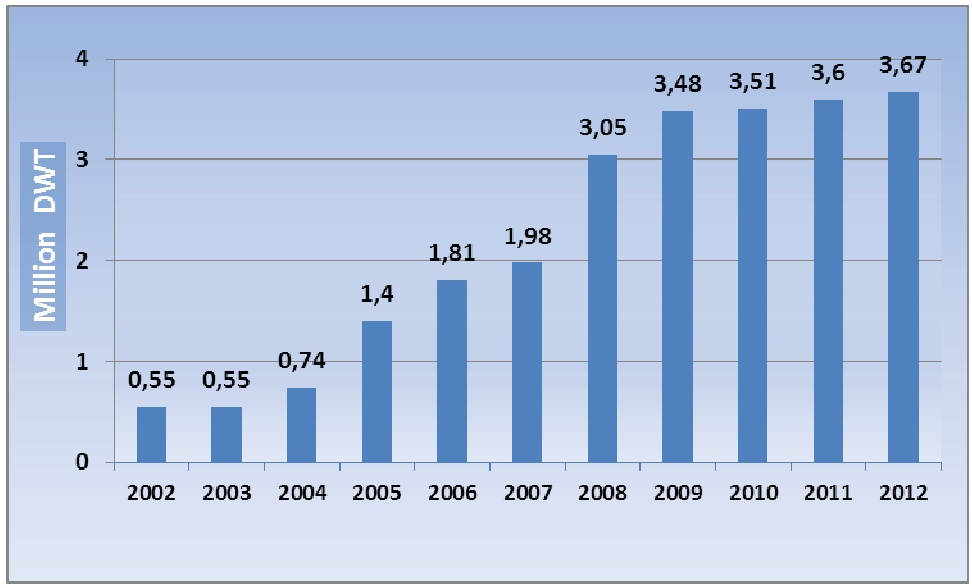
Most of the ships constructed in Turkish shipyards are being built for export. Especially between 2002-2009, almost the total amount of these ships exported to the EU member countries.

GRAPH (41): Export Figures of Turkish Shipbuilding Industry (2009-2012)



Source:Turkish Exporters Assembly

GRAPH (42): Shipyards Project Capacities between 2002-2012



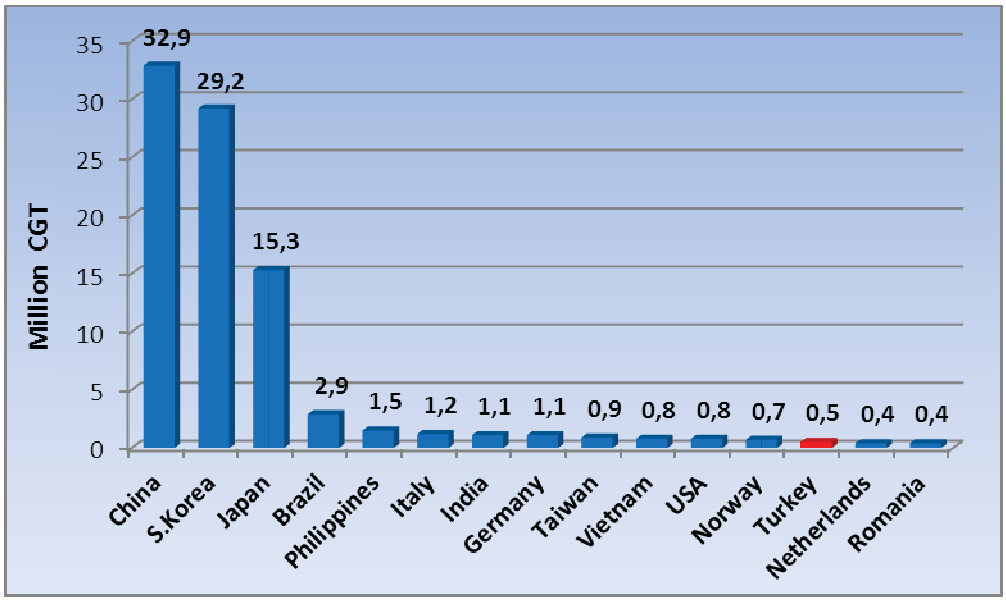
Source: Ministry of Transport, Maritime Affairs and Communications

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 2012, orders in our yards was decreased to 0,5 Million DWT. Due to lack of new orders, the shipyards are now mostly concerned with repair and maintenance facilities. In 2012 in Turkish shipyards 15.272.490 DWT of repair and maintenance had been done.

As of December 2012, 21 floating docks and 9 dry docks are operative in Turkey.

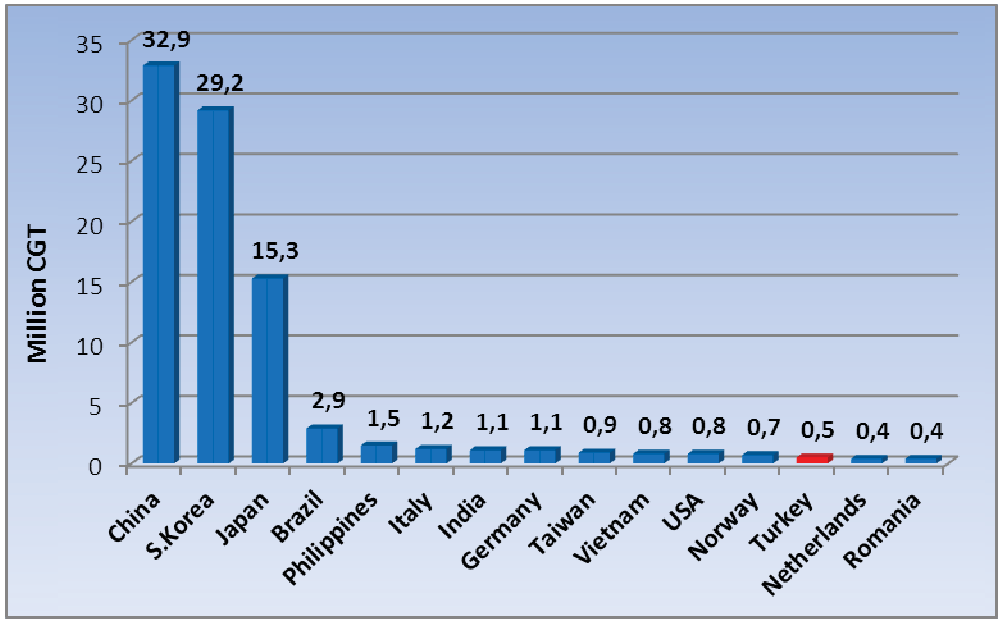
GRAPH (43): Orderbook by Builder Country (Quantity)



Source: Clarkson Research Services 01/2013

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

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

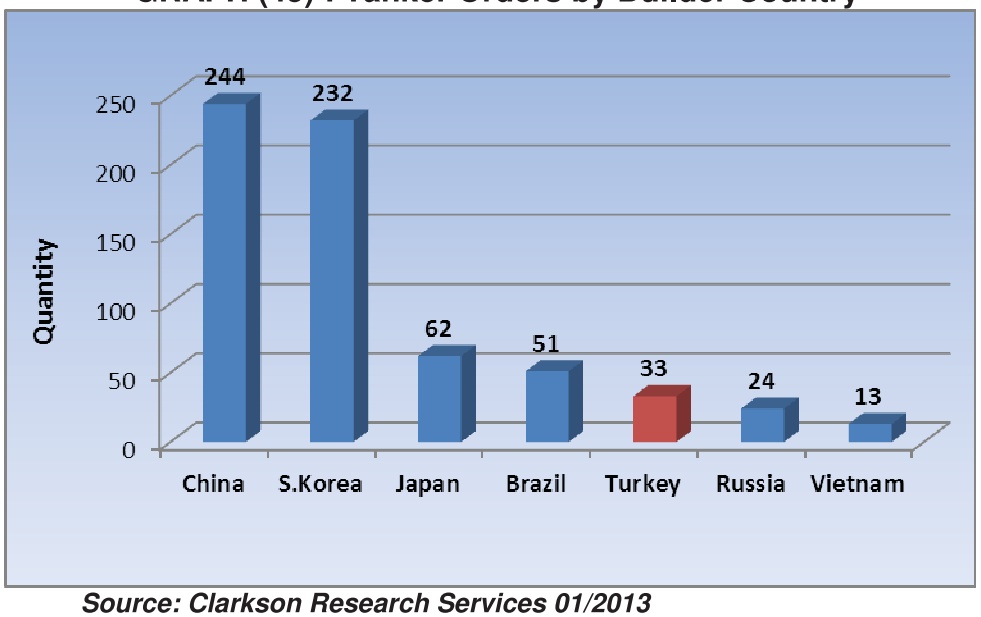


Source: Clarkson Research Services 01/2013

Turkish yards are in the 13th 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 5th place among the countries which takes tanker orders.

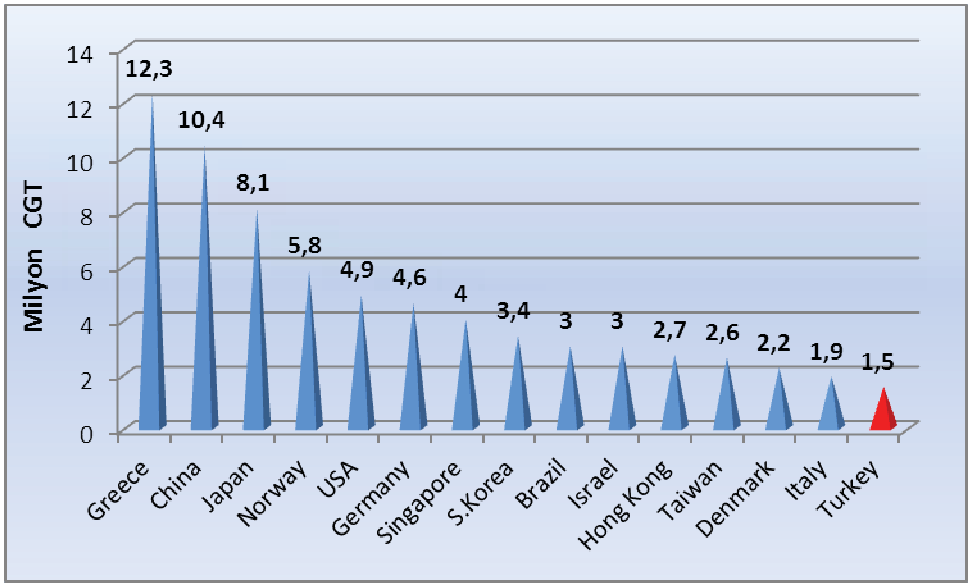
GRAPH (45) : Tanker Orders by Builder Country



Source: Clarkson Research Services 01/2013

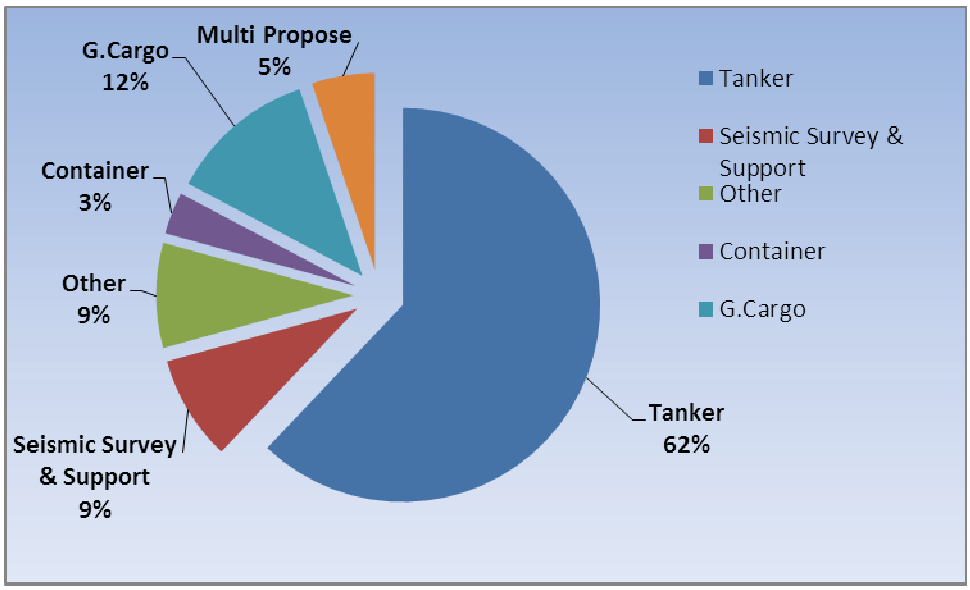
Turkish shipowners with their orders worldwide about 1,5 million CGT of 100ships are in the 13 th place in world ranking.

GRAPH (46): Orderbooks by Owner Country



Source: Clarkson Research Services 01/2013

GRAPH (47): Distribution of Orders According to Shiptype



Source: Clarkson Research Services 03/2013

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;

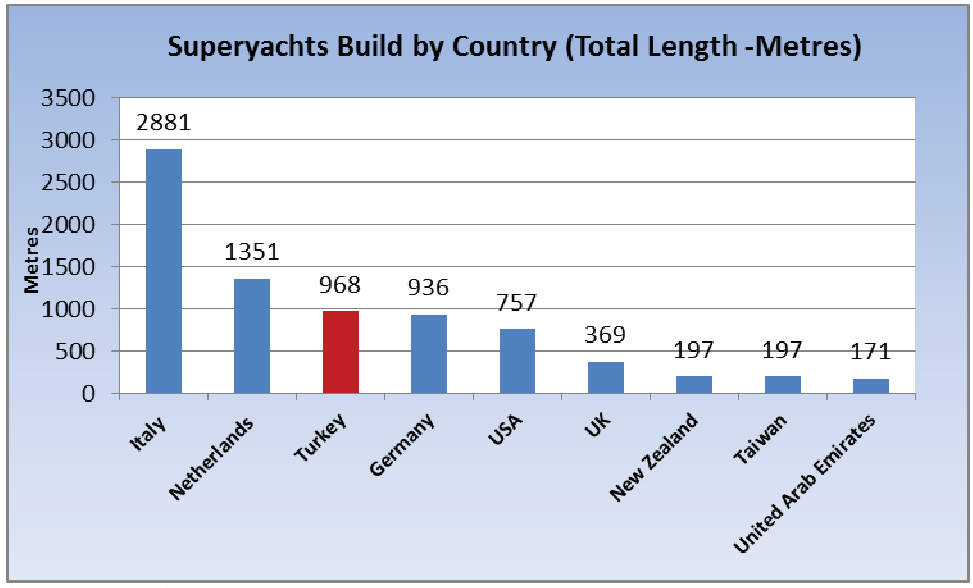
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to international markets
- Appropriate climate
- Our country's potential in boat&yacht building

Main disadvantages are;

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

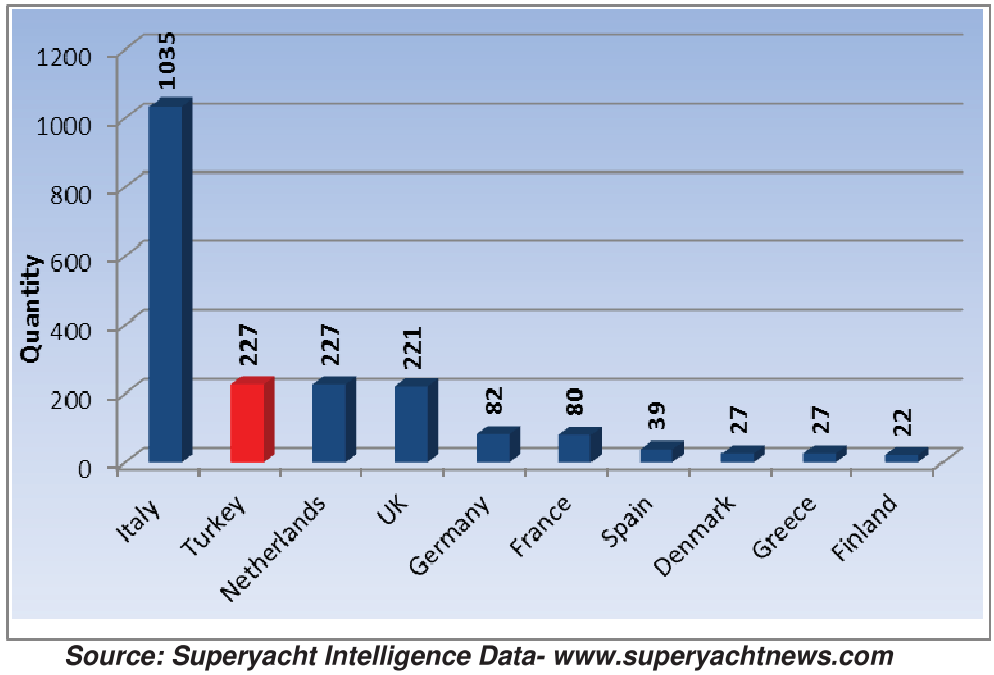
The 195 30 metre+ superyachts delivered in 2010 were built in 24 diffrent countries. Turkey is in the 3rd place with 25 superyachts with the total length of 968 metres which equals to 11,20% of market share.

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



Source:The Super Yachting Index- Fourth Edition July 2011

GRAPH (49): Number of Yachts Between 30-40m Built in European Countires



Source: Superyacht Intelligence Data- www.superyachtnews.com

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% 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.

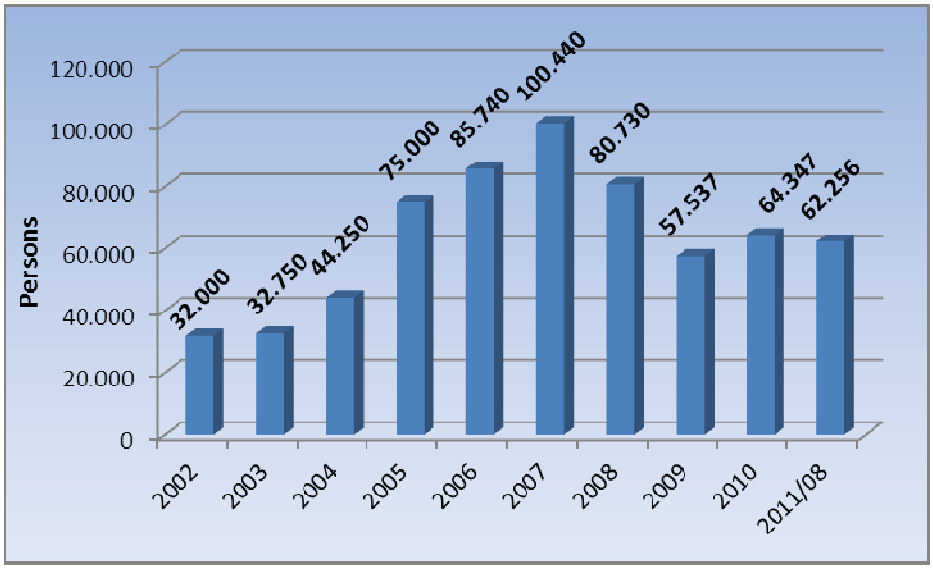
Turkish sub-industry regarded as one of the best in supplying anchor, chain, bollard, electric cables, hydrologic units but in electronic equipment especially in navigational systems due to their producer are a few basic worldwide, sector needs to obtain from import resources.Steel sheet production in 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 - Carpentery and furnishings.

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

Sub-industry creates employment as 1 to 3.In 2002 employment 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 (50):Shipbuilding Sub-Industry Employment



Source: Ministry of Transport, Maritime Affairs and Communications

TABLE (47) : Orderbook of Turkish Shipyards as of May 2013

No	Hull No.	Type	Dwt	GRT	Size	Unit	CGT	Delivery	Yard	Yard Status	Contract Date	Current Owner
1	8	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2013-	Eregli Shipyard	Established <2000	01.01.2007	Med Marine Group
2	1053	Chem & Oil	6,4		6,4	DWT	8,224	2014-03	Tersan Shipyard	Established 2000-10	08.01.2013	Gefo Gesellschaft
3	1054	Chem & Oil	6,4		6,4	DWT	8,224	2014-06	Tersan Shipyard	Established 2000-10	08.01.2013	Gefo Gesellschaft
4	1055	Chem & Oil	6,4		6,4	DWT	8,224	2014-09	Tersan Shipyard	Established 2000-10	08.01.2013	Gefo Gesellschaft
5	N/A	Seis. Support			4	HP	3,213	2015-07	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
6	N/A	Seis. Support			4	HP	3,213	2015-03	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
7	N/A	Seis. Support			4	HP	3,213	2014-11	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
8	N/A	Seis. Support			4	HP	3,213	2014-08	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
9	N/A	GCargo	12,107	9	12,107	DWT	9,164	2013-	Gelibolu Shipyd	Established <2000	01.01.2011	Albros Shipping
10	10	GCargo	24	18,05	24	DWT	14,306	2013-06	Sefine Shipyard	Established 2000-10	01.09.2010	Q-Shipping B.V.
11	11	GCargo	24	18,05	24	DWT	14,306	2013-12	Sefine Shipyard	Established 2000-10	01.09.2010	Q-Shipping B.V.
12	N/A	PSV	4,5			HP	7,226	2014-11	Besiktas Shipyard	Established 2000-10	01.09.2012	Palmali Shipping
13	N/A	PSV	4			HP	6,716	2014-06	Besiktas Shipyard	Established 2000-10	01.09.2012	Palmali Shipping
14	N/A	PSV	4			HP	6,716	2014-11	Besiktas Shipyard	Established 2000-10	01.09.2012	Palmali Shipping
15	N/A	Bunkering	1,7		1,7	DWT	2,504	2013-10	Akdeniz Gemi	Greenfield	05.07.2012	Pallas Shipping AB
16	H66	PSV	4	3,1	9,2	HP	6,721	2013-06	Selah Shipyard	Established <2000	01.01.2012	Marnavi
17	N/A	Seis. Survey				HP	11,37	2014-01	Istanbul S.Y.	Established <2000	25.04.2012	Govt of Turkey
18	8	L.P.G.	3,6	3,43	3,3	cu.m.	6,42	2013-07	Besiktas Shipyard	Established 2000-10	30.10.2006	Gas and Heat S.p.A.
19	142	GCargo	11	6,247	11	DWT	7,254	2013-04	Selay Shipyard	Established 2000-10	01.09.2010	Safi Shipping
20	176	Asp.& Bit.	7		7	DWT	8,307	2013-03	Sedef Gemi End.	Established <2000	24.02.2012	Elcano
21	11	Ethy/LPG	8	8,097	9	cu.m.	10,475	2013-09	Besiktas Shipyard	Established 2000-10	17.02.2012	Gas and Heat S.p.A.
22	5	Chem & Oil	15,995	11	15,995	DWT	14,03	2013-	Duzgit Yalova	Greenfield	01.06.2010	Duzgit Group
23	6	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2013-	Duzgit Yalova	Greenfield	01.07.2010	Duzgit Group
24	1	MPP	9,5	4,896	9,5	DWT	6,207	2013-	Akdeniz Gemi	Greenfield	01.07.2008	Akdeniz Gemi

25	34	Container	10,6	8,97	917	TEU	9,261	2013-	UM Deniz Shipyard	Established <2000	01.04.2005	Volum Denizcilik
26	35	Container	10,6	8,97	917	TEU	9,261	2013-	UM Deniz Shipyard	Established <2000	01.04.2005	Volum Denizcilik
27	36	Chem & Oil	38	22,495	38	DWT	20,793	2013-	UM Deniz Shipyard	Established <2000	01.01.2007	Unknown
28	N/A	Chem & Oil	12,7		12,7	DWT	11,527	2013-06	Marmara Tersanesi	Established <2000	03.12.2010	Yilmar Shipping
29	N/A	Chem & Oil	8,5		8,5	DWT	9,243	2013-05	Marmara Tersanesi	Established <2000	03.12.2010	Yilmar Shipping
30	N/A	Chem & Oil	8,5		8,5	DWT	9,243	2013-10	Marmara Tersanesi	Established <2000	03.12.2010	Yilmar Shipping
31	N/A	GCargo	11		11	DWT	8,223	2013-03	Marmara Tersanesi	Established <2000	01.08.2008	Yilmar Shipping
32	N/A	GCargo	11		11	DWT	8,223	2013-05	Marmara Tersanesi	Established <2000	01.08.2008	Yilmar Shipping
33	28	GCargo	7,5	4,6	7,5	DWT	5,964	2013-	Karadeniz Shipyd.	Established <2000	01.03.2009	Unknown
34	221	Chem & Oil	6	3,954	6	DWT	7,992	2013-	Anadolu Shipyard	Established <2000	01.07.2008	Anadolu Kim. Tanker.
35	18	Chem & Oil	7,114	4,684	7,114	DWT	8,772	2013-06	Besiktas Shipyard	Established 2000-10	28.10.2009	Palmali Shipping
36	19	Chem & Oil	7,114	4,684	7,114	DWT	8,772	2013-10	Besiktas Shipyard	Established 2000-10	28.10.2009	Palmali Shipping
37	1	Chem & Oil	6,4	4,1	6,4	DWT	8,153	2013-	Denta Shipyard	Greenfield	01.07.2007	Den-Ta Denizcilik
38	37	MPP	9,7	7,5	9,7	DWT	8,155	2013-	Madenci Shipyard	Established <2000	01.07.2005	Unknown
39	118	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2013-	Selay Shipyard	Established 2000-10	01.01.2006	Selay Deniz. Sanayi
40	119	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2014-	Selay Shipyard	Established 2000-10	01.07.2007	Selay Deniz. Sanayi
41	128	Chem & Oil	3,2		3,2	DWT	5,401	2014-	Selay Shipyard	Established 2000-10	01.09.2007	Selay Deniz. Sanayi
42	87	Chem & Oil	5,6	3,583	5,6	DWT	7,57	2013-	Celik Tekne	Established <2000	01.10.2007	KGS Denizcilik
43	88	Chem & Oil	5,6	3,583	5,6	DWT	7,57	2013-	Celik Tekne	Established <2000	01.10.2007	KGS Denizcilik
44	2052	Chem & Oil	11,259	7,321	11,259	DWT	11,215	2013-	Dearsan Shipyd.	Established <2000	01.07.2007	Yardimci Shpg. Group
45	26	Chem & Oil	5,3	3,125	5,3	DWT	7,022	2013-01	Eregli Shipyard	Established <2000	12.10.2007	John T. Essberger
46	47	Oceanograph.		498	41	LOA(m)	2,163	2013-05	Ceksan Shipyard	Established <2000	01.10.2007	TÜBITAK
47	81	Chem & Oil	12,7	9,004	12,7	DWT	12,567	2013-04	Marmara Tersanesi	Established <2000	01.08.2007	Yildirim Group
48	36	MPP	9,7	7,5	9,7	DWT	8,155	2013-	Madenci Shipyard	Established <2000	01.07.2005	Unknown
49	9	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2013-	Eregli Shipyard	Established <2000	01.01.2007	Med Marine Group
50	20	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2013-	Eregli Shipyard	Established <2000	01.01.2007	Med Marine Group
51	30	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2013-01	Eregli Shipyard	Established <2000	01.01.2007	Medmaritime Ltd.
52	90	Chem & Oil	4,9		4,9	DWT	6,827	2013-	Ustaoglu Shipyard	Established <2000	01.01.2006	Tanmarin Denizcilik

Source: Clarkson Research Ser. 05/2013





PORTS



EHAPTER IV

PORT DEVELOPMENTS

Improvements in World Economy

Inspite of rapid recovery process of world trade by an increase of % 13.8 in 2010, developments in 2011 and expectations for 2012 and 2013 indicate that the improvement will be slower than expected. 2011 improvement in world trade remained low by % 5 acc.to 2010. This improvement is expected to be % 3.7 in 2012 and recovering itself to % 5.6 by 2013.

Improving by 3.8% in 2010, world's gross national product has slowed down its improvement to 2.4% in 2011. According to World Trade Organization's expectations, world's gross national product will improve by 2.1 % in 2012 and 2.7% in 2013. As being one of the world's fastest growing economies by 9.2% in 2010 and 8.5% in 2011, Turkey will expand by 3.3% in 2012 and 4.6% in 2013 according to OECD expectations.

There are many reasons affecting the slowing down of world trade and GDP improvements. However amongst outstanding reasons could be counted as public dept crisis bringing forward the collapse of Euro Zone, interruption of supply chain and production in Japan and Thailand because of natural disasters and also disorders in Arab countries.

Recording an increase by 8.5% of GDP (Gross Domestic Product) in 2011, Turkey became one of the fastest improving countries of the world. As a result of natural disaster occurred at 2011 in Japan, Japan's GDP decreased by 0,5% which caused development of developed countries' GDP to realize as % 1.5 where as USA reached an above average value (1.7%).

Being the fastest developing countries in 2011 are China (9.2%), Argentina (8.9%), Turkey (8.5%) and India (7.8%), from the country groups point of view; Middle East (4.9%), Commonwealth of Independent States (4.5%), South and Central America Countries (4.5%) and Asian Four composed of Singapore, Hong Kong, South Korea and Taiwan (% 4.2) became the biggest developed country groups.

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 3 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 2012.

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**

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 in disharmony whit technological developments and insufficient railway integrations to ports that will supply cargoes to be distributed fast and on time.

387.426.232 tons of cargo is realized at Turkish ports in 2012.

- 23,6 % of handling is export with 91.307.486 tons.
- 49,7 % of handling is import with 192.474.928 tons.
- 12,1 % of handling is cabotage with 46.919.387 tons.
- 14,6 % of handling is transit with 56.724.431 tons.

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

TABLE (48): Cargo Handling Figures At Turkish Ports (Acc. to Transport Mode)

MODE OF TRANSPORT		2008	2009	2010	2011	2012
EXPORT	TURKISH	10.654.742	9.578.520	11.615.686	12.273.915	12.235.897
	FOREIGN	62.590.230	64.191.743	72.329.476	69.502.777	79.071.589
	TOTAL	**73.244.972**	**73.770.263**	**83.945.162**	**81.776.692**	**91.307.486**
IMPORT	TURKISH	21.136.641	20.387.046	28.878.432	30.120.033	26.476.350
	FOREIGN	130.394.670	119.475.045	133.747.337	143.426.365	165.998.578
	TOTAL	**151.531.311**	**139.862.090**	**162.625.769**	**173.546.398**	**192.474.928**
CABOTAGE	LOADING	18.922.148	18.305.867	18.561.807	21.257.193	22.869.458
	UNLOADING	20.134.058	19.485.900	19.434.485	22.387.290	24.049.929
	TOTAL	**39.056.206**	**37.791.767**	**37.996.292**	**43.644.483**	**46.919.387**
TRANSIT	LOADING	50.744.950	58.012.586	58.767.061	58.603.055	50.767.011
	UNLOADING	-	-	5.355.657	5.776.095	5.957.420
	TOTAL	**50.744.950**	**58.012.586**	**64.122.718**	**64.379.150**	**56.724.431**
GR.TOTAL	LOADING	142.912.070	150.088.716	161.274.030	161.636.940	164.943.955
	UNLOADING	171.665.369	159.347.990	187.415.911	201.709.783	222.482.277
	TOTAL	**314.577.439**	**309.436.706**	**348.689.941**	**363.346.723**	**387.426.232**

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

GRAPH 51: Cargo Handling Figures According To Years

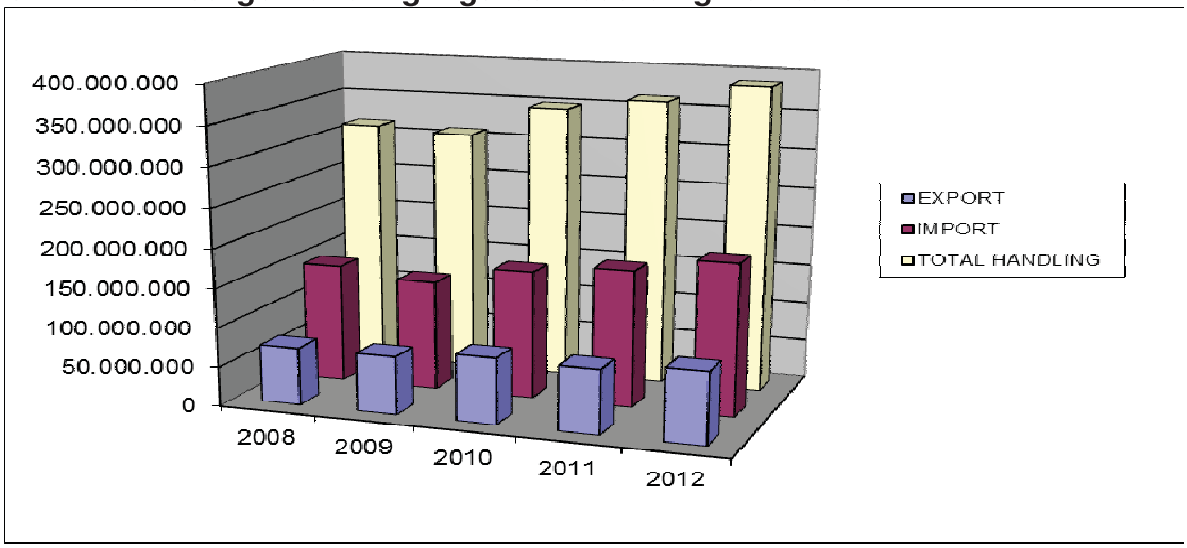
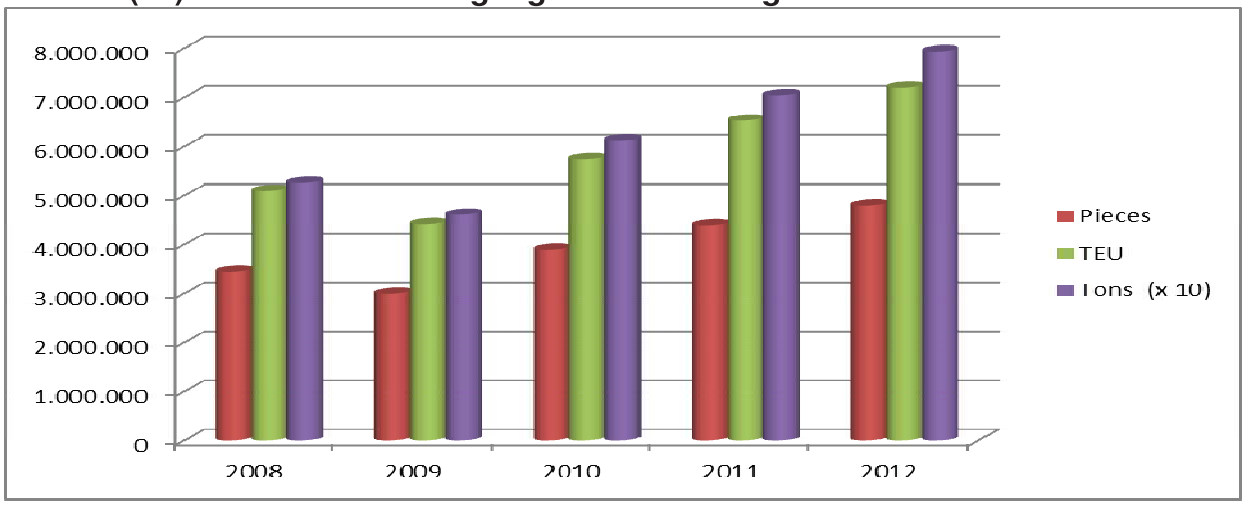


TABLE (49): Container Handling Figures At Turkish Ports

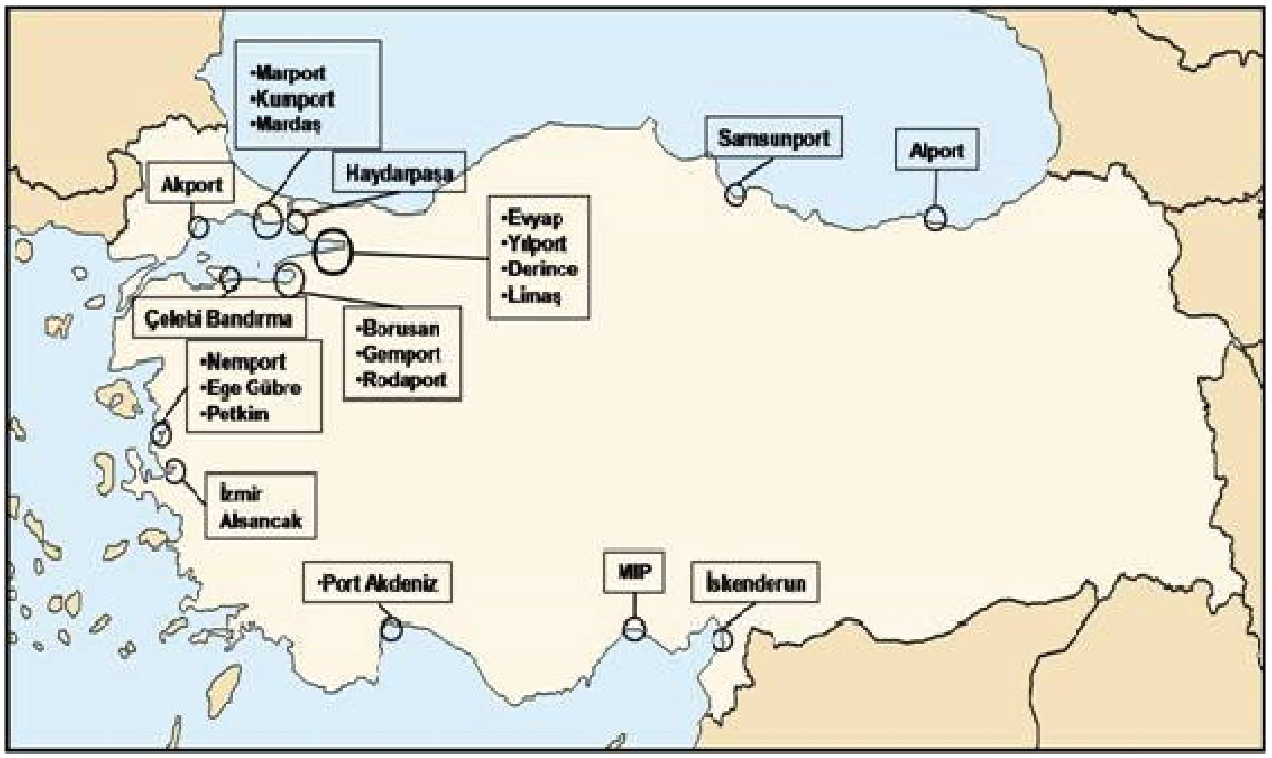
MODE OF TRANSPORT		2008	2009	2010	2011	2012
EXPORT	PCS	1.594.200	1.448.806	1.557.767	1.798.545	1.910.075
	TEU	2.377.989	2.132.113	2.306.587	2.690.889	2.879.122
	TONS	25.422.389	24.171.131	26.433.473	30.010.607	33.199.345
IMPORT	PCS	1.642.639	1.434.680	1.591.010	1.851.026	1.953.229
	TEU	2.435.119	2.117.762	2.354.304	2.770.190	2.942.562
	TONS	24.655.826	20.680.474	23.151.182	28.409.300	29.871.028
CABOTAGE	PCS	117.879	100.998	152.096	215.942	342.604
	TEU	162.908	142.025	208.325	305.256	472.345
	TONS	1.248.040	1.044.653	1.730.667	2.890.088	4.758.088
TRANSIT	PCS	75.211	7.451	590.531	514.014	589.019
	TEU	115.606	12.542	874.239	757.171	898.368
	TONS	1.203.829	134.486	9.859.808	9.071.262	11.482.912
GRAND TOTAL	PCS	**3.429.929**	**2.991.935**	**3.891.404**	**4.379.527**	**4.794.927**
	TEU	**5.091.622**	**4.404.442**	**5.743.455**	**6.523.506**	**7.192.396**
	TONS	**52.530.084**	**46.030.744**	**61.175.130**	**70.381.257**	**79.311.373**

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

GRAPH (52) Container Handling Figures According To Years



GRAPH (53): Container Handling Ports in Turkey



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. The 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)
Limak İskenderun	Container	400.000 TEU	3,000,000 TEU (2016)
Toros Tarım (Ceyhan)	General Cargo	15,000,000 Tons	25,000,000 Tons
	Liquid Bulk Cargo	235,000 m³	400.000 m³ (2014)
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 Port	Container	120,000 TEU	200,000 TEU (2012)
	General Cargo	2,000,000 Tons	2,500,000 Tons (2012)
Koruma Klor	General Cargo	-	300,000 Tons (2020)
	Liquid	2,200,000 Tons	3,200,000 Tons
Mardaş	Container	565,229 TEU	1,300,000 TEU (2013)
Martaş	General Cargo	3,000,000 Tons	5,000,000 Tons (2015)
Petkim	Container	-	1,100,000 TEU (2016)

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 (50):Handling Figures of Turklim Member Ports TCDD Ports And Others

CONTAINER (TEUS)

	2008	%	2009	%	2010	%	2011	%	2012	%
TURKLIM Members	3.964.373	75,83%	3.485.468	77,10%	4.932.869	84,1%	5.679.049	85,88%	6.336.425	87,64%
TCDD Ports	1.241.640	23,75%	1.014.261	22,43%	904.258	15,42%	897.036	13,56%		
Others	22.141	0,42%	21.057	0,47%	28.658	0,48%	36.950	0,56%		
TCDD etc. Ports									893.960	12,36%
TOTAL	5.228.154	100,00%	4.520.786	100,00%	5.865.785	100,00%	6.613.035	100,00%	6.336.425	100,00%

GENERAL AND BULK CARGO (TONS)

	2008	%	2009	%	2010	%	2011	%	2012	%
TURKLIM Members	64.782.826	67,61%	61.970.360	88,19%	73.829.860	72,52%	76.690.158	92,83%	101.068.082	84,22%
TCDD Ports	7.073.936	7,37%	5.449.558	7,76%	7.277.001	7,15%	5.922.616	7,17%		
Others	24.110.277	25,12%	2.845.898	4,05%	20.705.912	20,33%		0,00%		
TCDD etc. Ports									18.932.839	15,78%
TOTAL	99.670.340	100,00%	76.053.292	100,00%	101.812.773	100%	82.612.774	100%	120.000.921	100%

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

LIQUID CARGO (TONS)

	2008	%	2009	%	2010	%	2011	%	2012	%
TURKLIM Members	10.988.112	71,70%	12.675.876	90,07%	14.040.662	88,92%	12.791.433	92,52%	8.227.813	
TCDD Ports	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%		
TCDD etc. Ports										
TOTAL	15.435.396	100,00%	14.073.850	100,00%	15.789.425	100,00%	13.824.910	100,00%	8.227.813	

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

VEHICLE

TURKLIM Members	CONS. EQ.	BUS	TRUCK LORRY	CAR	OTHERS	TOTAL	PASSENGER
2008	364	411	262.294	671.343	23.999	958.411	
2009	783	243	256.879	646.470	36.806	941.181	695.133
2010	2.543	0	531.472	844.243	57.819	1.436.077	666.166
2011	2.440	1.780	646.563	904.373	56.035	1.611.191	901.204
2012	911	87.256	1.311.724	5.293.940	2.617.052	10.220.972	56.879.118

Source: TÜRKLİM



TDI Ports and Privatizations

TABLE (51): 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
TEKİRDAĞ	2.100,00	(- 12,5)				
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 *(operational rights transfered back to TDI on 13 March 2012)*, 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 52: 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**

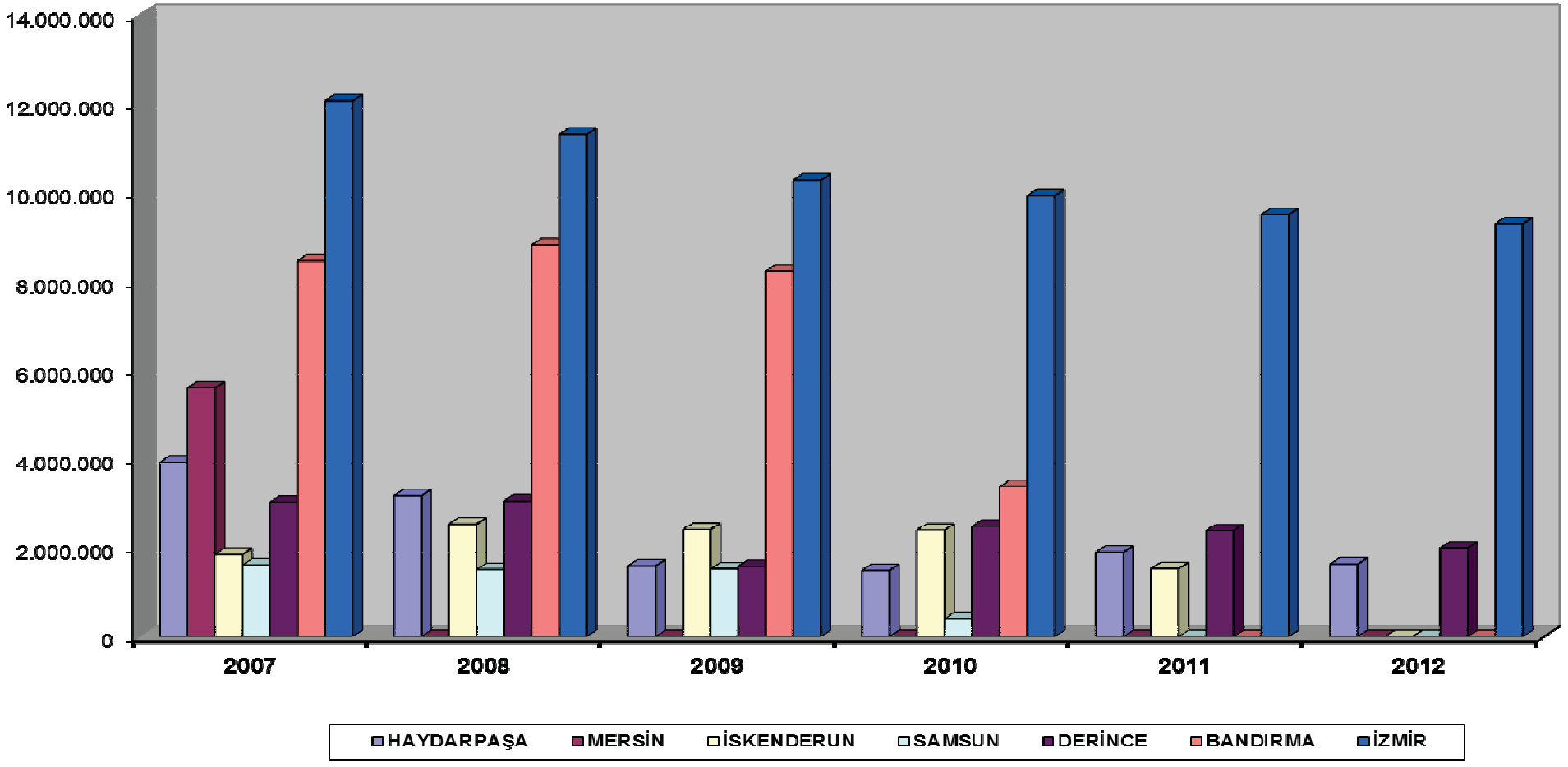
Source: TCDD

Table (53): TCDD Ports 2007-2012 Handling Figures Acc To Cargo Groups (Tons)

PORT	YEAR	GENERAL CARGO	CONTAINER	DRY BULK	LIQUID BULK	TOTAL
HAYDARPAŞA	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
	2012	417.729	1.219.778	0	0	1.637.507
MERSİN	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
	2012	0	0	0	0	0
İSKENDERUN	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
	2012	0	0	0	0	0
SAMSUN	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	3440	787.266	33.019	1.529.006
	2010	187.930	794	209.691	6.230	404.645
	2011	0	0	0	0	0
	2012	0	0	0	0	0
DERİNCE	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
	2012	1.127.186	9.817	756.782	102.107	1.995.892
BANDIRMA	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
	2012	0	0	0	0	0
İZMİR	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
	2012	558.627	6.674.362	1.764.131	304.436	9.301.556
TOTAL	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
	2012	2.103.542	7.903.957	2.520.913	406.543	12.934.955

** 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.*
** İskenderun Port was handed over to Limak A.Ş. on 30.12.2011*

GRAPH (54): TCDD Ports 2007 – 2012 Handling Figures



GRAPH (55): 2012 TCDD Ports Handling Acc. To Cargo Groups

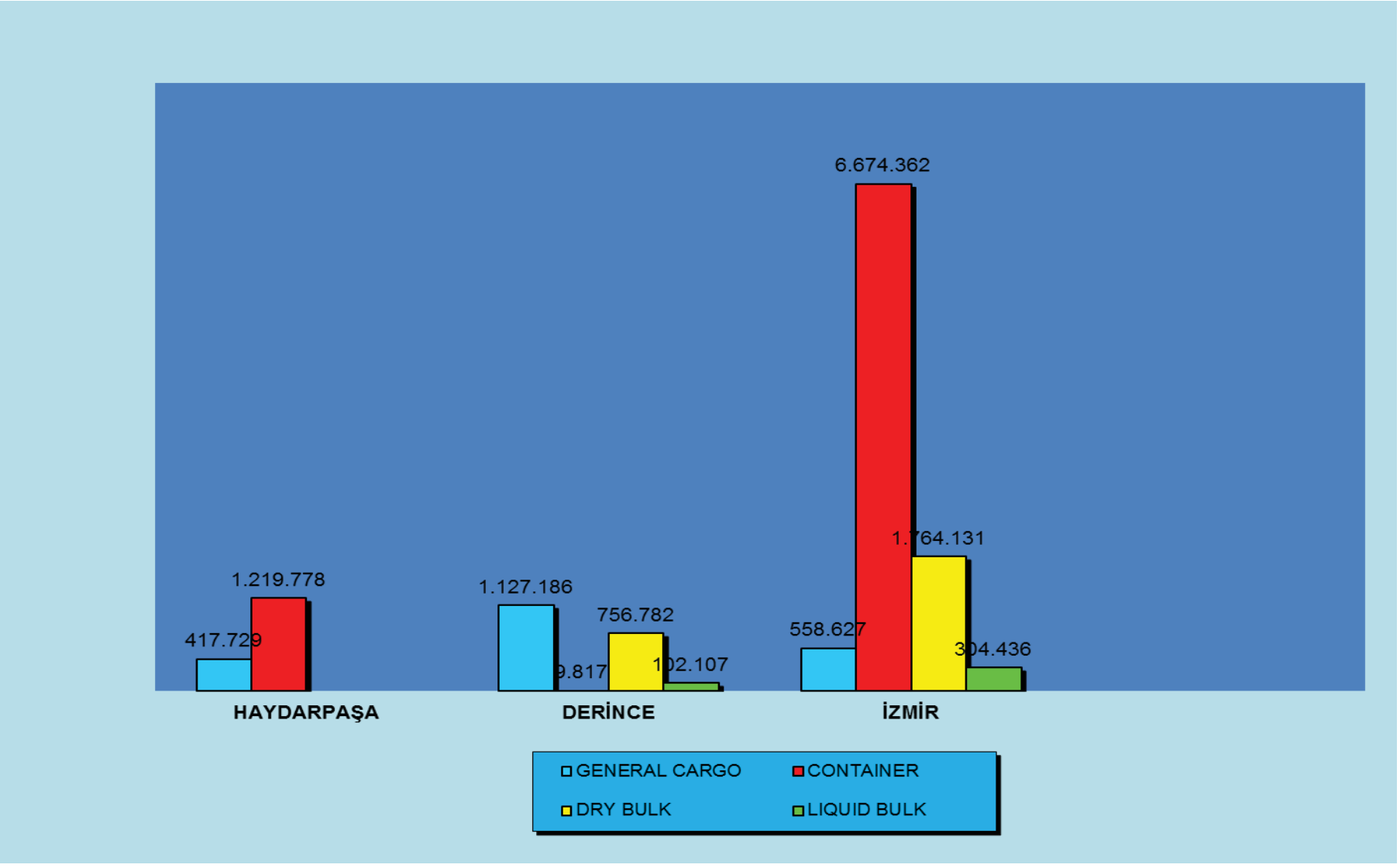
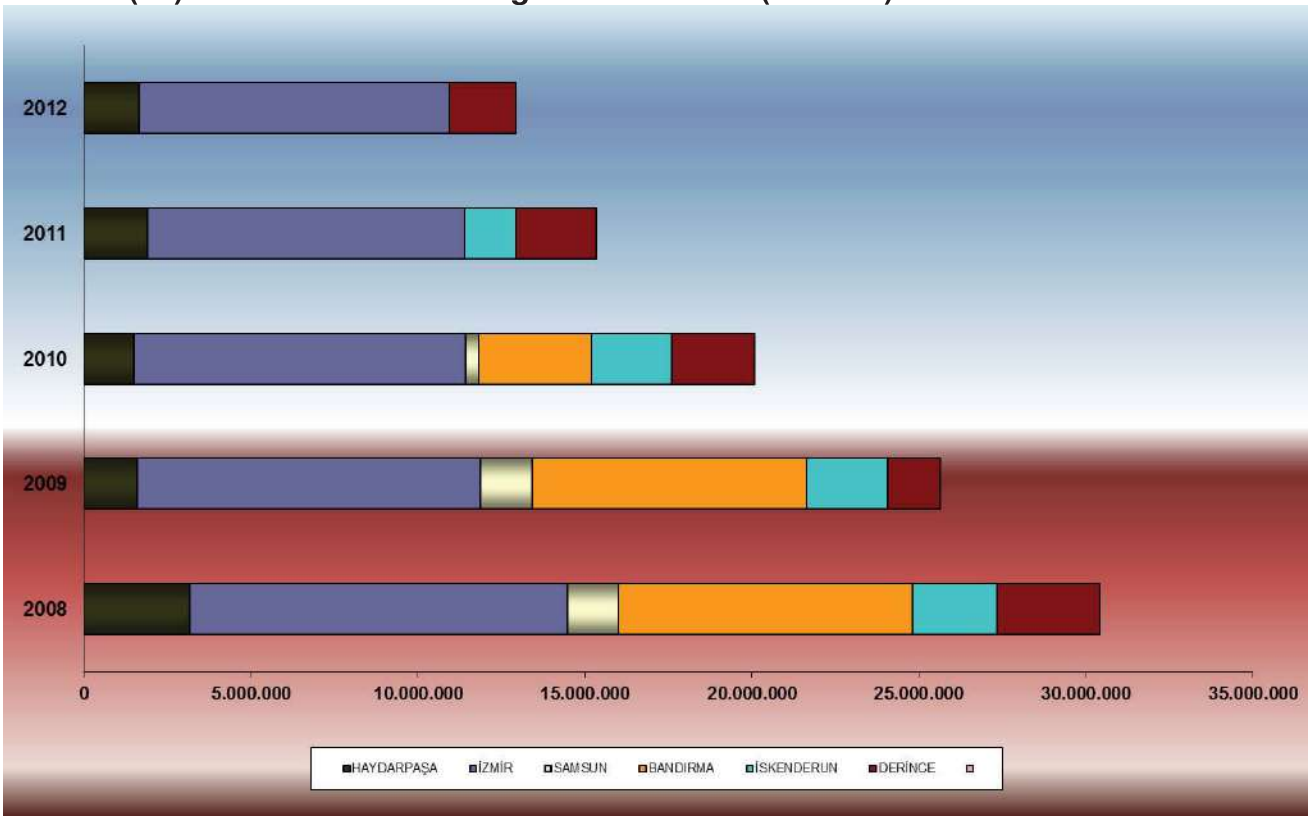


Table (54): TCDD Ports Loading And Unloading Figures

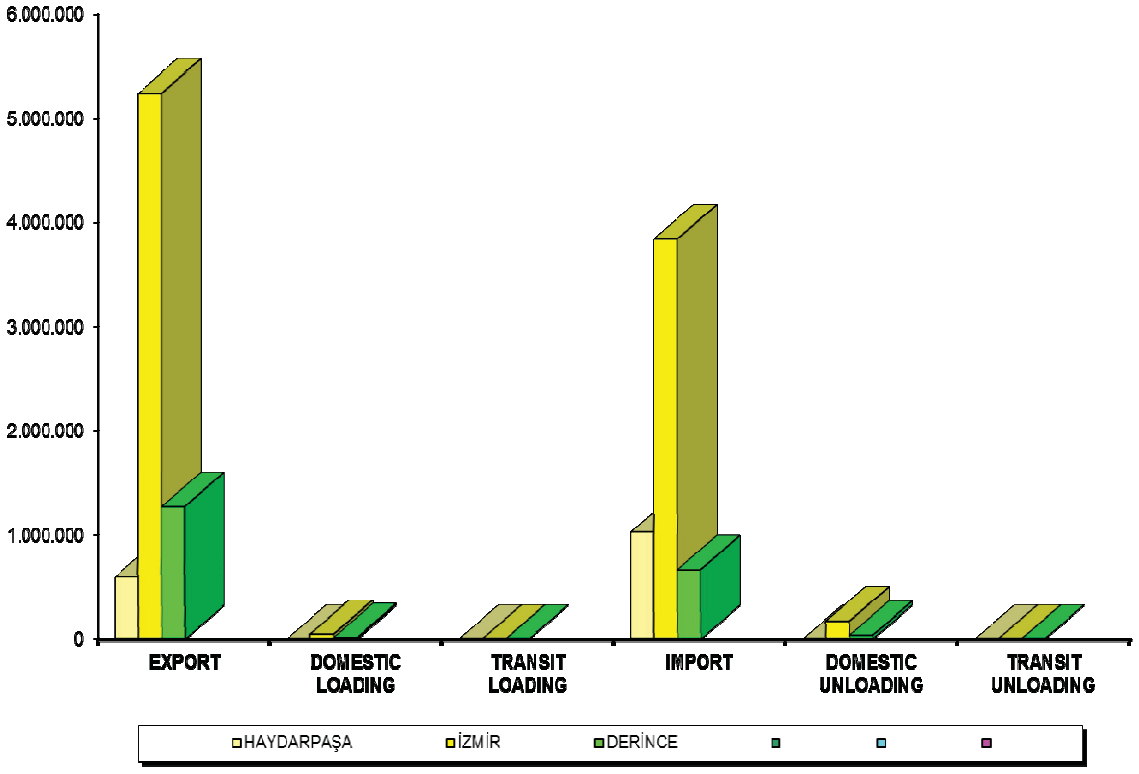
YEARS	LOADING			UNLODAING			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
HAYDARPAŞA							
2008	1.133.144	0	0	2.039.605	600	0	3.173.349
2009	537.233	949	0	1.056.288	3450	0	1.597.920
2010	403.616	20515	0	1.067.730	0	0	1.491.861
2011	612.846	0	0	1.285.145	0	0	1.897.991
2012	**602.875**	**1639**	**0**	**1.032.993**	**0**	**0**	**1.637.507**
İZMİR							
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
2012	**5.238.767**	**48667**	**0**	**3.841.169**	**172.953**	**0**	**9.301.556**
MERSİN							
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
2012	**0**	**0**	**0**	**0**	**0**	**0**	**0**
SAMSUN							
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
2012	**0**	**0**	**0**	**0**	**0**	**0**	**0**
BANDIRMA							
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
2012	**0**	**0**	**0**	**0**	**0**	**0**	**0**
İSKENDERUN							
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
2012	**0**	**0**	**0**	**0**	**0**	**0**	**0**
DERİNCE							
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
2012	**1.275.142**	**15.287**	**0**	**668.618**	**36.845**	**0**	**1.995.892**
TOPLAM							
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
2012	**7.116.784**	**65.593**	**0**	**5.542.780**	**209.798**	**0**	**12.934.955**

** 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): 2012 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 Constanta 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 Ports

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.

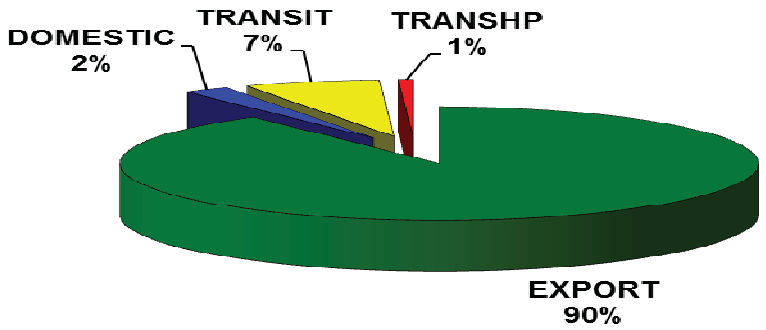
Free Port Zone

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

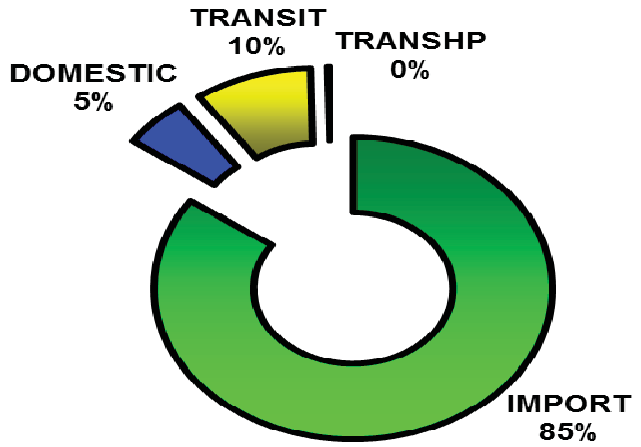
Table (55): Handling Figures of Mersin International Port (2012)

MERSIN INTERNATIONAL PORT									
TYPE OF CARGO	LOADING (Tonnes)				UNLOADING (Tonnes)				TOTAL
	EXPORT	DOMESTIC	TRANSIT	TRANSHP	IMPORT	DOMESTIC	TRANSIT	TRANSHP	
CEMENT	1.098.370	54.876	45.884		1.599		1.162		1.201.891
CEREALS	147.540	23.140	6.656	5.581	880.776	245	2.777	1.257	1.067.972
CHEMICALS	769.734	7.757	12.822	21.964	2.066.945	35.798	38.922	3.288	2.957.230
CITRUS	44.463		9.700		43.195		3.613	12	100.983
CNTR			304.767				301.480		606.247
CONST. MACHINERY	13.235		90	81	20.299	12	16.032	60	49.809
COTTON	61.685		18.233		264.287	532	1.392	157	346.286
EMPTY MAFI			13						13
FERTILIZERS	7.848	29.551	311	315	245.051	79.923	1.021		364.020
FOOD STUFF	1.191.483	645	34.084	3.867	943.516	438	40.233	3.765	2.218.031
FROZEN MEAT	11.054		453		19.243		137.800		168.550
FRUITS	137.986		5.000		128.002	393	387.442	1.680	660.503
GENERAL CARGO	1.799.346	5.272	196.934	27.723	2.410.574	91.543	307.677	31.916	4.870.985
GLASS	138.683	2.843	326	445	17.103	23	461	626	160.510
LEGUMES	139.329	123	3.741	611	274.294	96	8.689	585	427.468
LIVESTOCK	40			20	58.122		640	23	58.845
MACHINERY	51.558		634	4.063	88.098	205	7.423	318	152.299
MINERALS	2.416.154	67.266	6.017	75	571.923	6.018	1.208	90	3.068.751
PETR. PRODUCTS	64.492	38.518	119	39	3.242.025	617.872	22.547	32	3.985.644
RICE	69.899		9.080	292	174.161		21.262	292	274.986
SODIUM CARB.	490.907		24		15.041		51		506.023
SUGAR	6.110	12	5.355	5.764	2.250		5.620	3.918	29.029
TEXTILE	343.261	98	11.970	3.399	911.256	646	30.445	5.196	1.306.271
TIMBER	8.814		4.317	567	129.537	1.035	6.629	380	151.279
VEGETABLE OIL	73.303		11.668	782	777.423		52.810	152	916.138
VEHICLES	20.435	1	6.046	441	66.570		108.284	584	202.361
TOTAL	9.105.729	230.102	694.244	76.029	13.351.290	834.779	1.505.620	54.331	25.852.124

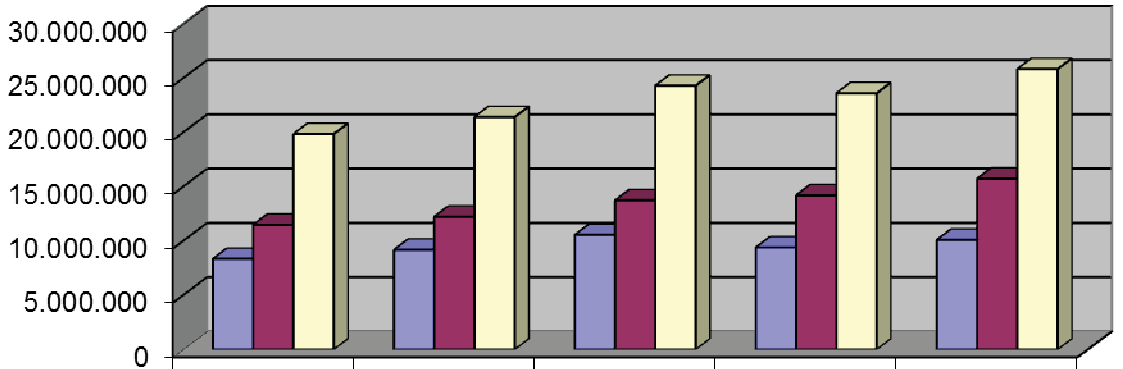
Graph (58): Mersin Port 2012 Loading



Graph (59): Mersin Port 2012 Unloading



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



	2008	2009	2010	2011	2012
LOADING	8.361.018	9.191.110	10.568.928	9.408.775	10.106.104
UNLOADING	11.496.406	12.232.222	13.750.599	14.213.504	15.746.020
TOTAL HANDLING	19.857.424	21.423.332	24.319.527	23.622.279	25.852.124

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.

1391 vessels called Samsun Port in 2012. Handling Figures of Samsun Port according to cargo groups are as below;

Handling Figures of Samsunport

Year	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (Tons)	Ro-Ro (Tons)	Wagon Ferry (Tons)	**Total (Tons)**
2012	1.543.651	55.742	716.700	393.184	528.682	62.018	3.299.977
2011	1.064.298	14.848	805.635	82.212	527.013	22.324	2.516.330
2010	844.993	32.008	637.415	4.015	402.376		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)
2012	367.221	3.485.486	225.189	9.748	205.462	821.008
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

Limakport İskenderun



Coordinates	36° 36' N, 36° 11' E
Port Field Area	752.000 (m2)
Berthing Place Lengths	1.630 (m)
Berthing Place Depths	Maks. 10-15.5 (m)

LimakPort İskenderun is located on the Northeast of the Mediterranean Sea. It renders services for transit traffic to Middle East countries as well as East and Southeast Anatolian territories. In this regard it occupies an important place as a transit port. The Port has a breakwater of 1400 m long. The depth at the port entrance is 12 m . The port is also connected with state railway and highway network. As a multi-purpose port, serves different type of commodities and cargo groups such as general cargo, dry/liquid bulk, container handling, and Ro-Ro vessels.

Handling Figures of Limakport İskenderun

Year	Project (Tons)	Generall Cargo (Tons)	Bulk (Tons)	**Total (Tons)**	Ro-Ro (Vehicle Pcs)	Ro-Pax (Vehicle Pcs)	Ro-Pax (Passenger Pcs)
2012	27.342	579.685	935.615	**1.542.642**	30.208	6982	5281

Source: Limakport İskenderun

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

PRIVATE PORTS ACCORDING TO REGION
ANTALYA DISTRICT
1. ALİDAŞ ALANYA LİMANI 2. ANTALYA LİMANI SERBEST BÖLGE RIHTIMI 3. ÇEKİSAN ŞAMANDIRASI 4. MOİL ŞAMANDIRA PLATFORMU 5. ORTADOĞU ANTALYA LİMAN İŞLETMELERİ A.Ş. (PORT AKDENİZ) 6. POAŞ ANTALYA ŞAMANDIRA TERMİNALİ
ÇANAKKALE DISTRICT
1. AKÇANSA ÇANAKKALE LİMANI 2. BAGFAŞ İSKELESİ 3. PORT OF BANDIRMA 4. BORUSAN LİMANI 5. BP GEMLİK İSKELESİ 6. GEMLİK GÜBRE LİMANI 7. GEMPORT 8. RODA LİMAN DEPOLAMA VE LOJİSTİK İŞLETMELERİ A.Ş. 9. İÇDAŞ İSKELESİ 10. DOLAMİT MADENCİLİK RIHTIMI 11. ÖZGÜMÜŞ MADENCİLİK RIHTIMI
İSTANBUL DISTRICT
1. ASYAPORT 2. AUTOPORT LİMAN İŞLETMELERİ A.Ş. 3. AKÇANSA AMBARLI LİMANI 4. AMBARLI DEPOLAMA TESİSLERİ 5. ANADOLU ÇİMENTO TESİSLERİ 6. SET ÇİMENTO SANAYİ VE TİCARET A.Ş. 7. AYGAZ LPG DEPOLAMA VE DOLUM TESİSLERİ 8. ÇEKİSAN ÇEKMECE DEPOLAMA 9. KUMPORT LİMANI 10. MARDAŞ 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. LİMAKPORT İSKENDERUN
2. TOROS CEYHAN TERMİNALİ
3. ADVANSA SASA POLYESTER TESİSLERİ
4. ÇEKİSAN ŞAMANDIRASI
5. GÜBRETAŞ SARISEKİ İSKELESİ
6. İSDEMİR LİMANI
7. DELTA PETROL LİMANI
8. ORHAN EKİNCİ İSKELESİ
9. YAZICI İSKELESİ
10. ATAŞ TERMİNALİ
11. MERSİN LİMANI
12. MMK ATAKAŞ DÖRTYOL LİMAN İŞLETMESİ
13. 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 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.

Besides their geopolitical and strategical importance, the Turkish Straits are highly congested with international maritime traffic due to being the only waterway between the Black Sea and The Mediterranean without any alternative.

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

TABLE (56) : Ships Passing Through the Turkish Straits

YEARS	ISTANBUL	ÇANAKKALE
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
2012	48.328	44.613

In the year 2011, 49.798 ships in total have passed through the Istanbul Strait with a monthly average of 4.149 ships; 45.397 ships in total have passed through the 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 (57) 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
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
2012	48329	24792	47637	27345	44463	3866	1064	47265

TABLE (58) 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
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
2012	44613	18775	44426	27318	38696	5917	519	44094

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

TABLE(59): The Ships Carried Dangerous Cargoes – İstanbul Strait

Years	Total passage	Number of Tankers	%	Dangerous Cargoes (Tons)
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**
2012	**48328**	(*)		

TABLE (60):The Ships Carried Dangerous Cargoes – Çanakkale Strait

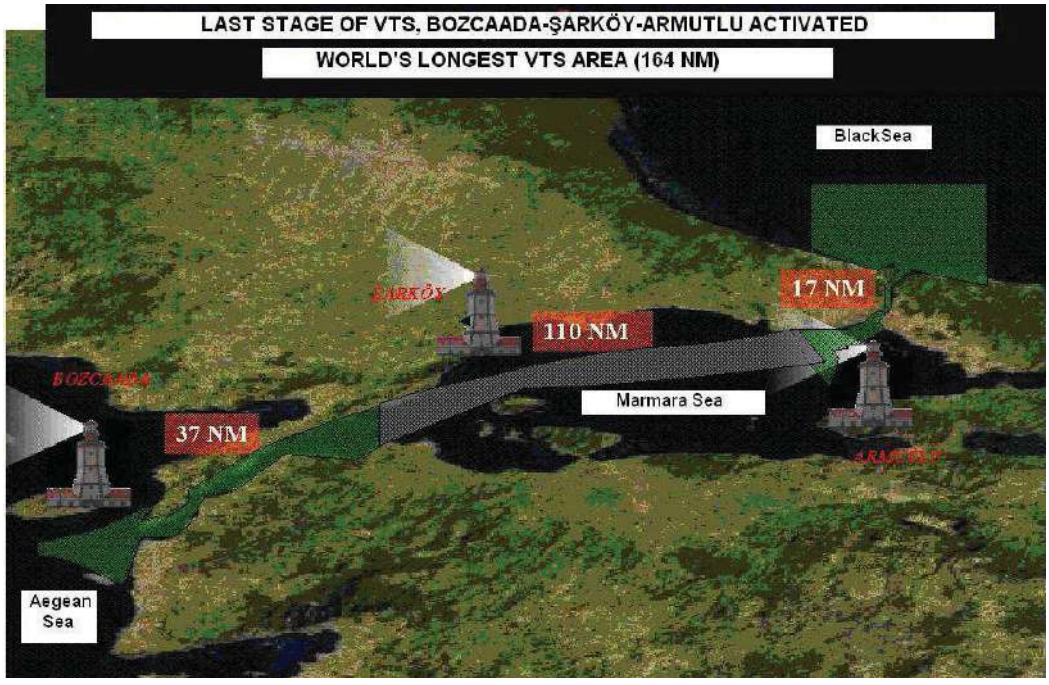
Years	Total passage	Number of Tankers	%	Dangerous Cargoes (Tons)
1998	38777	6546	17	81.974.831
1999	40582	7266	18	95.932.049
2000	41561	7529	18	102.570.322
2001	39249	7064	18	109.000.000
2002	42669	7627	18	130.866.598
2003	**42648**	**8114**	**19**	**145.154.920**
2004	**48421**	**9016**	**19**	**139.203.656**
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+**
2012	**44613**	(*)		

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 sailing 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 Ministry, 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. İzmit and İzmit VTS will become operational in 2013.

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 whit 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, İzmit 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 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 been 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.

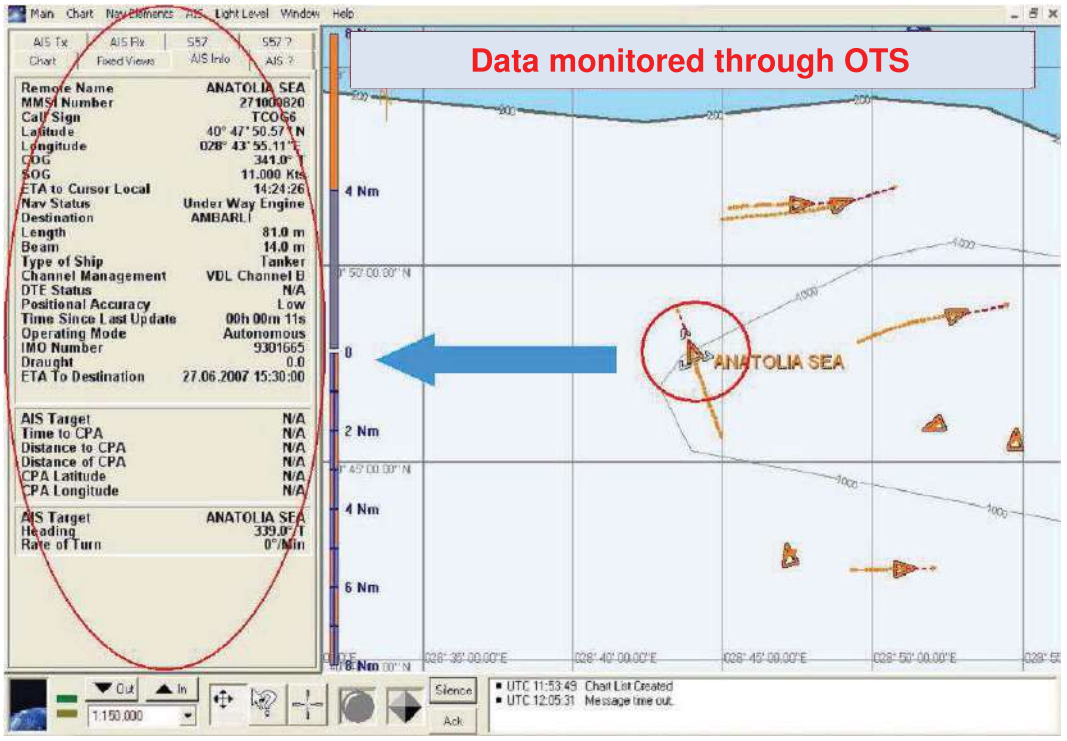
It is very important that the system infrastructure is installed on an elevated location in order to allow that the OTS Base Stations to be used between the vessels and the land have an effective coverage. Since such system operates on VHF band, it is essential that the antennas have optical sight of 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

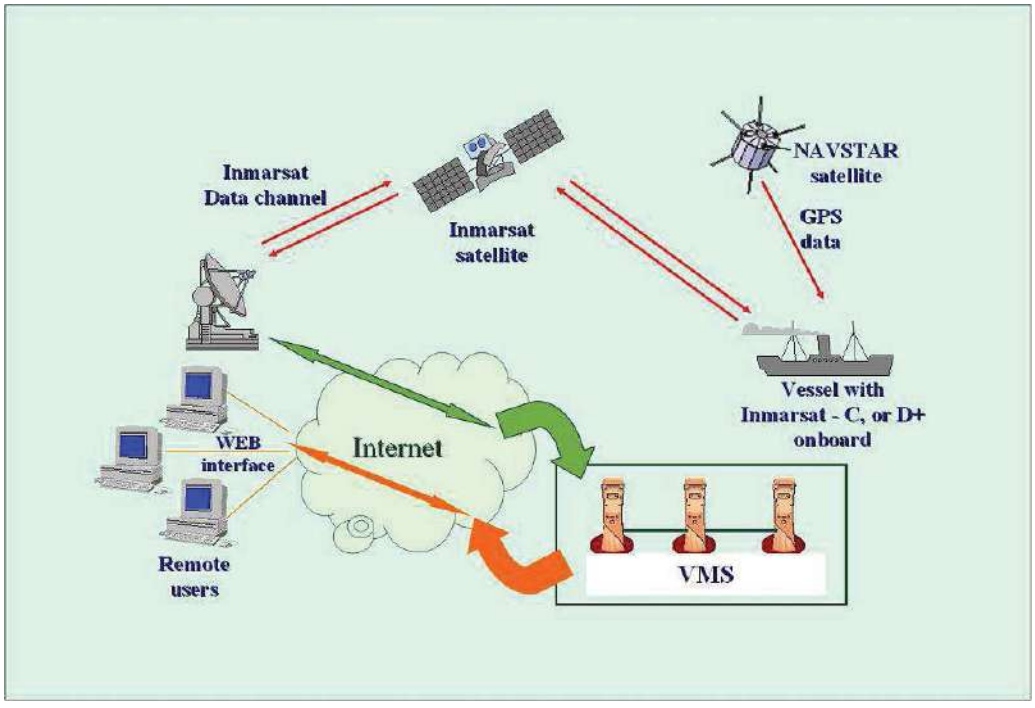
IMO member states will be able to receive long range identification and tracking information of the vessels with respect to security and other issues agreed by IMO. The responsibilities of countries as flag, port and coast states are defined.

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.

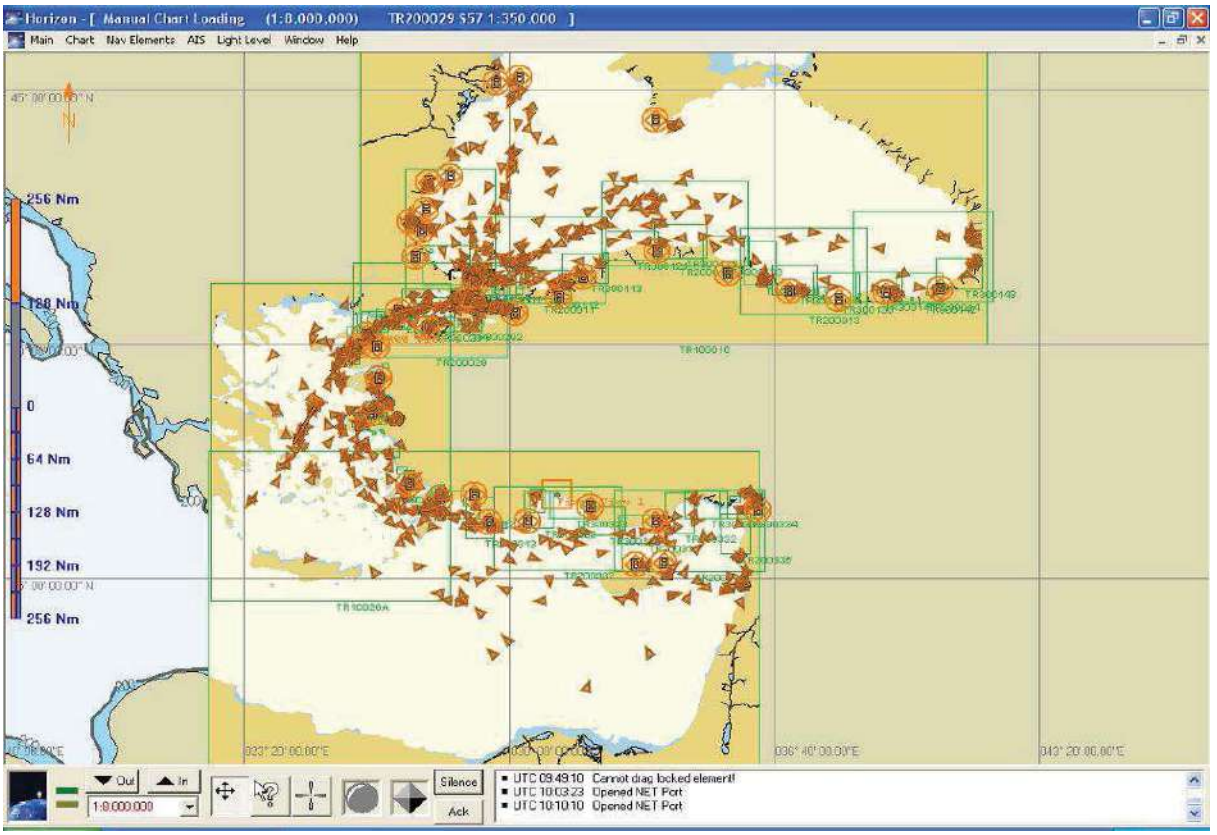
It has been possible with LRIT system to monitor the vessels flying Turkish flag everywhere in the world and vessels flying foreign flags for a distance of up to 1000 nautical miles from the coast. LRIT system operates by using INMARSAT satellites and the cost of the LRIT information requested is completely 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.

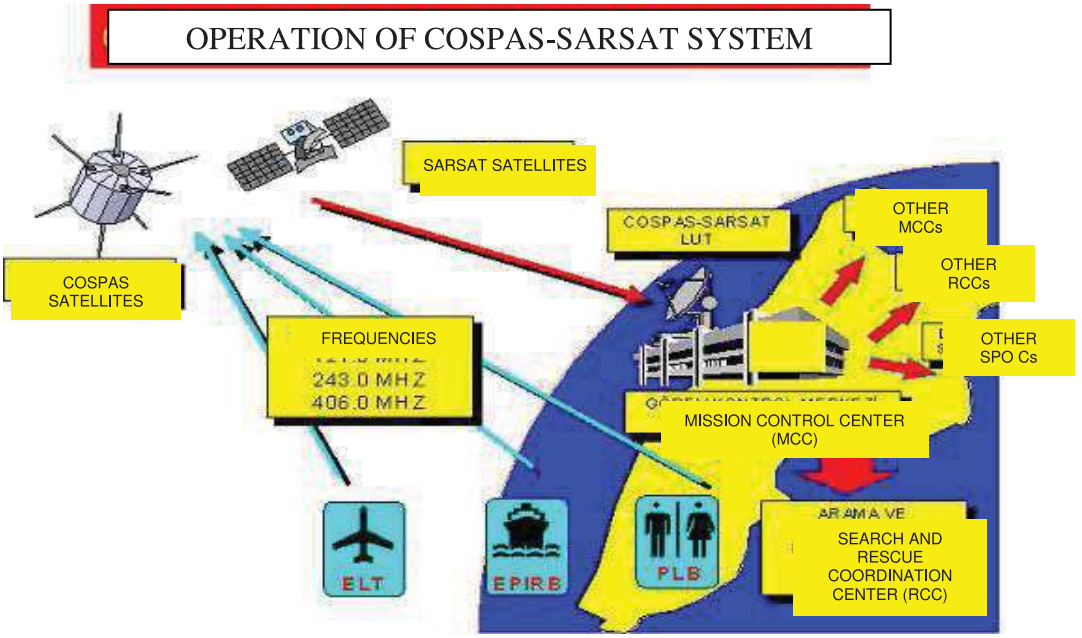
- **Main Search and Rescue Coordination Center (AAKKM)**

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:

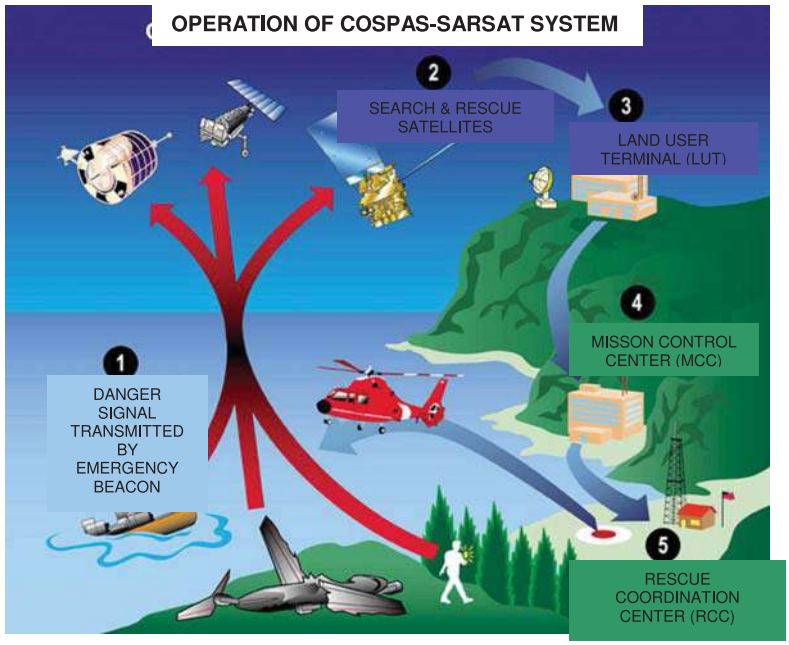
Search And Rescue Satellite Aided Tracking) system is an international system ensuring detection via the satellites of COSPAS-SARSAT system of the location of accident where any vessel, aircraft or persons have been engaged in an accident which notified by signals they transmitted via 460 MHz frequency,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

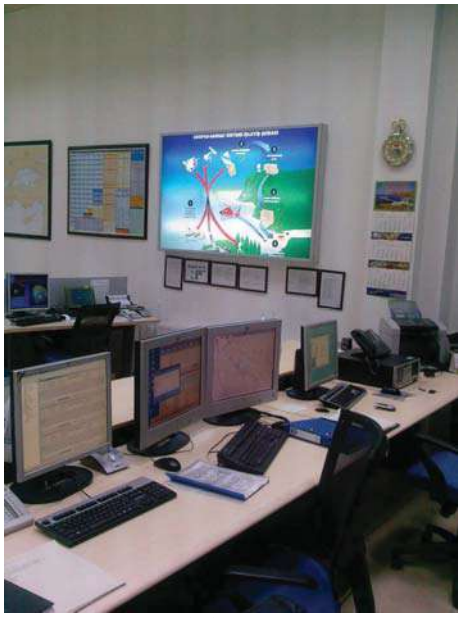
GEOLUT



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 The Ministry of Transportation, Maritime Affairs and Communications.

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 6th 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 The 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 guests from 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.

➢ Statistics of The Yachts & Capacity of The Registered Yachting Facilities

Most of 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 61: Marine Tourisim Facility with Tourism Administration Certificate (2012)

Business Tourism Documentation of Yacht Harbour

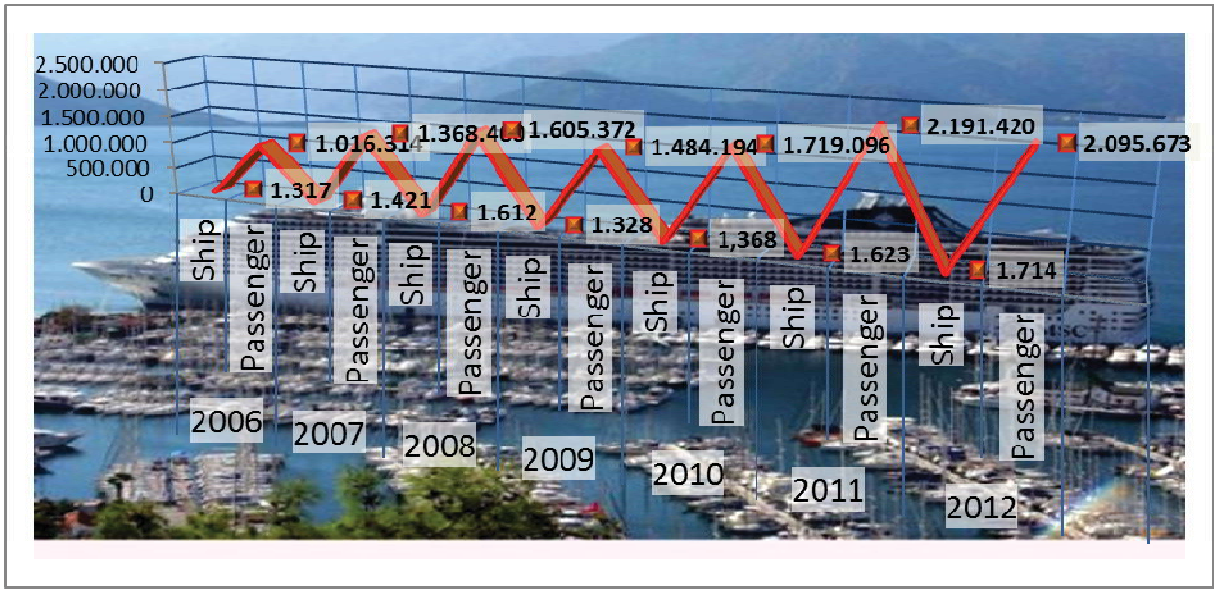
			CAPACITY	
PORT NAME	**TYPE**	**CITY OF**	**AT SEA**	**ON SHORE**
1-Setur Kuşadası Yacht Port	Main Yacht Port	Kuşadası / AYDIN	310	-
2-Ataköy Yacht Port	Secondary Yacht Port	Ataköy / İSTANBUL	700	40
3-Akdeniz Kemer Marina	Secondary Yacht Port	Kemer / ANTALYA	150	150
4-Kaleiçi Yacht Port	Yacht Berthing 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-Marine 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 Tourism	Yacht Slipway Facility	Gebze / KOCAELİ	-	60
2-Ayvalık Marina	Yacht Slipway Facility	Ayvalık / BALIKESİR	-	140
3-Albatros Marina	Yacht Slipway Facility	Marmaris / MUĞLA	40	48
4-Yat Lift	Yacht Slipway Facility	Bodrum/MUĞLA		400
5-Ağanlar	Yacht Slipway Facility	Bodrum/MUĞLA	-	200
6-Göcek Marina	Yacht Slipway Facility	Fethiye/MUĞLA	-	156
TOTAL			**40**	**1004**
GRAND TOTAL			**1044**	
Yacht Harbour Investment Tourism Documantation				
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 Palmarin	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 SETUR	Main Yacht Port	YALOVA	240	80
15-Sığacık Yacht Port TEOS Marina	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-Marmaris Marina	Yacht Slipway Facility	Marmaris/MUĞLA	-	200
2-Yacht Marin	Yacht Slipway Facility	Marmaris/MUĞLA	-	100
3-Ege Yacht	Yacht Slipway Facility	Milas/MUĞLA	-	15
TOTAL			-	**315**
GRAND TOTAL			-	**315**
Source:Ministry of Culture and Tourism 03.01.2013				

➢ 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 Ports Between **2006-2012**



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.

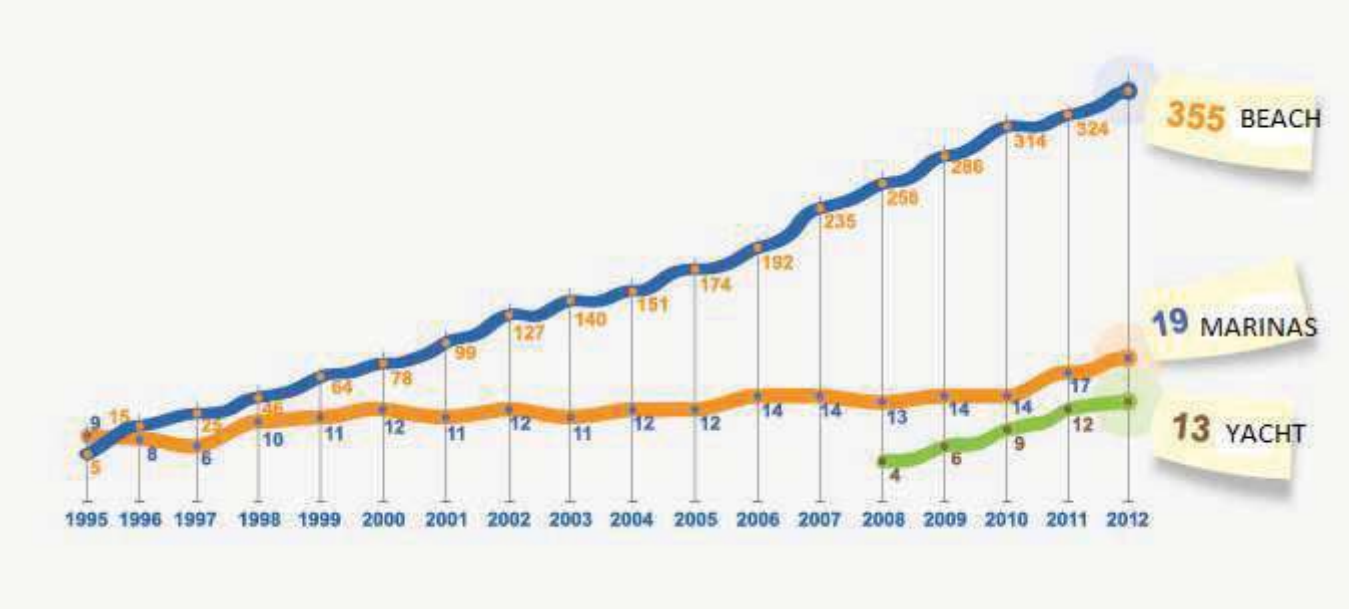
TABLE 62: Number of Transit Passengers Coming by Cruise Ships (2006-2012) (Source: Undersecratariat of Maritime Affairs)

PORT	2006		2007		2008		2009		2010		2011		2012	
	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER
Alanya	114	80.440	124	93.937	84	57.000	73	50.285	2	1.071	22	25.743	22	25.743
Antalya	32	13.015	34	15.680	41	25.057	23	12.549	41	103.859	64	127.250	55	159.430
Anamur	0	0	0	0	0	0	0	0	0	0	4	351	1	63
Bartın	-	-	-	-	8	957	10	941	4	555	2	208	9	882
Bodrum	66	10.478	63	9.892	126	52.862	87	38.414	89	31.700	82	46.031	131	52.832
Çanakkale	24	5.008	23	5.207	31	8.776	33	8.712	17	7.670	23	4.371	25	4.184
Çeşme	-	-	-	-	3	1.819	1	817	16	9247	1	89	25	4.787
Datca	-	-	-	-	1	207	3	1.041	3	778	0	0	0	0
Dikili	23	3.990	13	2.631	29	10.424	13	6.592	26	15.401	34	17.485	24	4.865
Fethiye	67	3.566	4	948	13	4.217	8	2.615	5	879	5	1.975	11	1.969
Göcek	-	-	-	-	6	1.121	10	1.532	16	2.274	7	1.216	6	1.038
Güllük	-	-	-	-	19	2.747	5	1.172	1	279	3	1.692	7	1.079
İskenderun	-	-	-	-	3	819	2	1.884	1	106	5	1.308	0	0
İstanbul	306	273.553	340	422.896	404	489.544	313	476.541	342	508.246	420	627.897	382	596.027
İzmir	105	184.797	122	287.357	133	318.451	129	315.454	159	378.266	262	493.533	288	552.764
Kaş	-	-	-	-	6	600	4	1.341	8	1.317	3	507	7	1.018
Kemer	-	-	-	-	1	37	0	0	6	602	0	0	0	0
Kuşadası	471	368.696	613	466.677	601	518.872	506	462.746	517	493.911	568	662.456	464	564.317
Marmaris	83	65.265	64	60.039	70	101.874	74	81.472	84	146.531	84	170.021	88	110.279
Mersin	-	-	-	-	4	941	3	1.583	1	106	3	416	2	774
Mudanya	-	-	-	-	1	482	4	1.309	1	24	5	922	0	0
Samsun	9	2.661	8	186	5	596	9	1.524	4	825	3	208	7	1.190
Sinop	-	-	-	-	6	3.136	14	7.861	7	7.098	9	4.088	10	3.708
Taşucu	-	-	-	-	1	18	3	440	2	201	4	805	4	709
Trabzon	17	4.845	13	2.950	15	4.813	18	7.369	14	7.952	13	6.267	18	8.015
Tuzla	-	-	-	-	1	2	0	0	2	0	0	0	0	0
Yalova	-	-	-	-	-	-	-	-	-	-	-	-	1	0
TOTAL	**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**	**1.623**	**2.191.420**	**1.587**	**2.095.673**

➢ Blue Flag Compaign

The Blue Flag Compaign is one of the four projects executed under the co-ordination of the Europe Environmental Education Foundation (EEEF). 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, Marinas and Yachtes with Blue Flags by Years



Source: TURÇEV

TABLE 63 : Number of Internatioanal Year of The Blue Flag in 2012

BEACHES			MARINAS		
1	**Spain**	540	**1**	**Germany**	110
2	**Greece**	394	**2**	**Spain**	99
3	**France**	358	**3**	**Holland**	88
4	**Turkey**	**355**	**4**	**France**	84
5	**Portugal**	275	**5**	**İtaly**	62
6	**Denmark**	253	**6**	**Denmark**	58
7	**Italy**	247	**7**	**Sweden**	38
			8	**Turkey**	19
	Other 30 Country	667	**12**	**Other 27 Country**	63
	TOTAL	**3089**		**TOTAL**	**621**

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 the 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

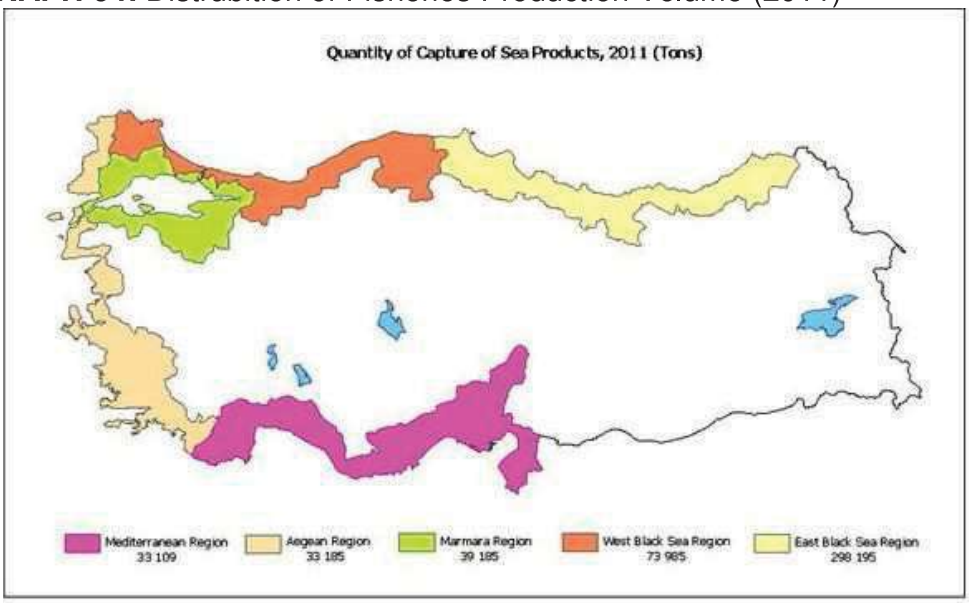
Turkey has a rich water products potential.The seas around Anatolia has variant and distinct ecological characteristics. The area of natural lakes is 178,000 km², and the area of dams is 3,442 km².

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 (2011)



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 2011 ;

Fishery production increased 7,73% in 2011

Fishery production increased by 7,73% in 2011 with respect to the previous year and became 703 545 tons. The total fishery production consisted of sea fish by 61,44%, other sea products by 6,45%, inland water products by 5,27% and aquaculture by 26,83%.

Capture of fishery production increased 5,93%, aquaculture 12,95% in 2011

The capture production was 514 755 tons and aquaculture production became 188 790 tons. 53,21% of the amount of aquaculture production took place at the inland waters and 46,79% at the seas. The most important types produced at the inland waters are trout by 53,1%, sea bass 24,9% and sea bream by 17,05% at sea.

Marine production by catching increased 7,18%

Sea products production showed an increase of 7,18% and became 477 658 tons. Of all the sea production, East Black Sea is the first by the ratio of 62,43%. West Black Sea follows it by 15,49%, the Sea of Marmara by 8,20%, The Aegean Sea by 6,95%and The Mediterranean by 6.93%

Anchovy production which is one of the important types of sea fish was 228 491 tons, showing a decrease of 0,23%. Sprat production with 87 141 tons has a ratio with 20,16% after anchovy.

Inland water products production by catching decreased 7,85% in 2011.

In 2011, inland water production decreased by 7,85% with respect to the previous year and became 37 097 tons. Tarek by 19,45% and common carp by 17,08% showed a decrease, which has an important share in the inland water products.

In 2010

Fishery production decreased by 3,58% in 2010 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 a 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%, The Aegean Sea by 11,15%, The Sea of Marmara by 8,28%, and The 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 a 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%, The Aegean sea by 8,89%, The Sea of Marmara by 8,86%, and The 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 64: 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 65: Quantity and Volume of Fishery Products (2010-2011)

Quantity of fishery products (tons)

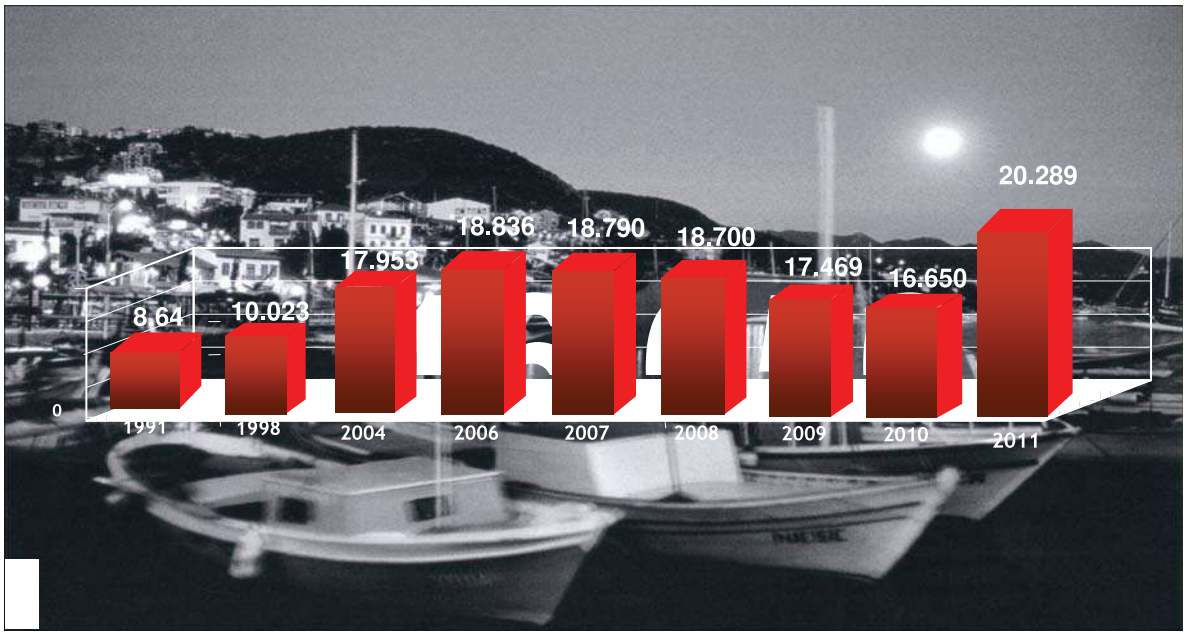
	2010	Share (%)	2011	Share (%)	Change (%)
Fishery products	**653 080,0**	**100,00**	**703 545,2**	**100,00**	**7,73**
Fishery products by catching	**485 939,0**	**74,41**	**514 755,2**	**73,17**	**5,93**
Sea fish and other sea products	**445 680,0**	**68,24**	**477 658,4**	**67,89**	**7,18**
Sea fish	399 656,0	61,20	432 246,0	61,44	8,15
Other sea products	46 024,0	7,05	45 412,4	6,45	-1,33
Inland water products	**40 259,0**	**6,16**	**37 096,8**	**5,27**	**-7,85**
Aquaculture	**167 141,0**	**25,59**	**188 790,0**	**26,83**	**12,95**

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 scale fishermen,collected through survey, having vessels equal to or less than 10 meters

TABLE 66: 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%, Aquaculture production in the inland waters 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

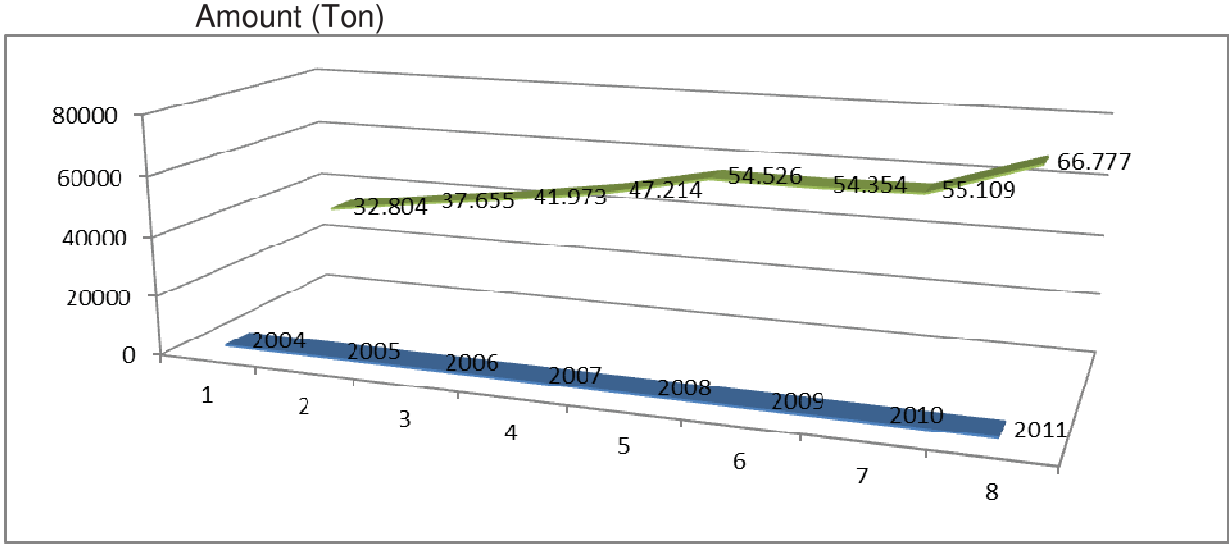
In the previous years, major part of Turkish export water products consisted of frozen fish; but currently it consists of canned fish. Export of canned-fish, is mostly

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 (2004-2011)



Import

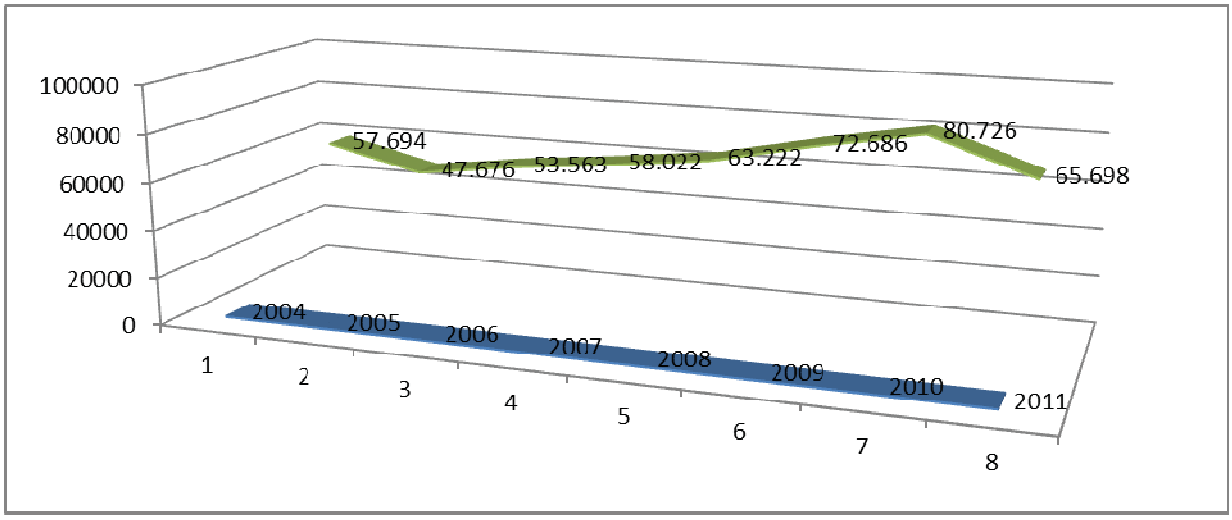
There is an increase in sea food imports. 90 % of sea food imports consists of frozen fish. An important share in import is from The Danube where Tuna fish comes. Import of this fish is made from the European Union countries (especially Holland, UK, and Norway), also from some of the African countries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

39,552 in 1999 (tons), 80,726 In 2010 the exports (tons), reaching the last eleven 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 2004-2011

(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 IN TURKEY

Turkish Ministry of Transport, Maritime Affairs and Communications is the main authority in Turkey in the field of Maritime Shipping. The Ministry issued Regulations for Seafarers in 2002, in order to raise the maritime training in the country to IMO standards and the equality of the Turkish certificates and diplomas have been accepted by IMO.

The Turkish Republic has maintained its place in the "White List" as regards Maritime Education in the MSC.Circ. 1164 / Rev 7, the Circular published by IMO. Also, following the inspections made by EMSA (European Maritime Safety Agency), the graduates of the Maritime Schools in Turkey are able to work in the ships under the flags of EU Member States.

Turkish Chamber of Shipping, which is one of the most important NGO's of the Turkish Maritime Sector, strongly supports the Maritime Education and considers maritime training as one of its main functions and duties. Within this framework; the First Priority: has been given to the "Lack of Officers Problem" and the main objective has been to provide a solution to it in the long and medium terms. The 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 in 1993 by 52 founder members, mainly from the Turkish Maritime Sector. Its aim is to assist theTurkish Maritime Shipping's reaching a high level so as to create Shipping Policies which will help to increase the economical strength and productivity of our Country and also to support the development every way of the maritime schools and educational foundations in Turkey.

In our country there are 11 faculties of maritime studies (including one in The Northern Cyprus Turkish Repuplic) which provides education at Bachelor's level (four years), 12 Anatolian High Schools and 62 Anatolian Technical High Schools.

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

ANATOLIAN MARITIME 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

ANATOLIAN MARITIME 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
23. Ulusoy Denizcilik Anadolu Meslek Lisesi
24. Güzelbahçe İMKB Denizcilik Anadolu Meslek Lisesi
25. Şehit İdari Ateşe Çağlar Yücel Denizcilik Anadolu Meslek Lisesi
26. Nevvar Salih İşgören Denizcilik Anadolu Meslek Lisesi
27. İnebolu Denizcilik Anadolu Meslek Lisesi
28. Gölcük Denizcilik Anadolu Meslek Lisesi
29. Hereke Nuh Çimento Denizcilik Anadolu Meslek Lisesi
30. Mersin Deniz Ticaret Odası Denizcilik Anadolu Meslek Lisesi
31. Silifke Denizcilik Anadolu Meslek Lisesi

32. Gündoğan Fahriye Ilıcak Denizcilik Anadolu Meslek Lisesi
33. Fethiye Denizcilik Anadolu Meslek Lisesi
34. Fatsa Atatürk Denizcilik Anadolu Meslek Lisesi
35. Ünye Denizcilik Anadolu Meslek Lisesi
36. Işıklı Denizcilik Anadolu Meslek Lisesi
37. Çayeli Ahmet Hamdi İshakoğlu Denizcilik Anadolu Meslek Lisesi
38. Hasan Kemal Yardımcı İMKB Denizcilik Anadolu Meslek Lisesi
39. Pazar Denizcilik Anadolu Meslek Lisesi
40. Nedime Serap Ulusoy Denizcilik Anadolu Meslek Lisesi
41. Sinop Denizcilik Anadolu Meslek Lisesi
42. Tekirdağ Denizcilik Anadolu Meslek Lisesi
43. Trabzon Denizcilik Anadolu Meslek Lisesi
44. Of Hacı Mehmet Bahattin Ulusoy Denizcilik Anadolu Meslek Lisesi
45. Sürmene Türk Telekom Denizcilik Anadolu Meslek Lisesi
46. Van Denizcilik Anadolu Meslek Lisesi
47. Altınova Tersane Girişimcileri A.Ş. Denizcilik Anadolu Meslek Lisesi
48. Hatice Erdem Denizcilik Anadolu Meslek Lisesi
49. Kaptan Ahmet Fatoğlu Denizcilik Anadolu Teknik Lisesi
50. Ziya Kalkavan Denizcilik Anadolu Teknik Lisesi
51. Fatsa Atatürk Denizcilik Anadolu Teknik Lisesi
52. Çayeli Ahmet Hamdi İsakoğlu Denizcilik Anadolu Teknik Lisesi
53. Çanakkale İMKB Denizcilik Meslek Lisesi
54. Espiye Şehit Cengiz Sarıbaş Denizcilik Meslek Lisesi
55. Eğirdir Denizcilik Meslek Lisesi
56. Barbaros Hayrettin Paşa Denizcilik Meslek Lisesi
57. Güzelbahçe İMKB Denizcilik Meslek Lisesi
58. Mordoğan Fatma Emin Karaağaç Denizcilik Meslek Lisesi
59. Çınarlı Denizcilik Meslek Lisesi
60. Köyceğiz Denizcilik Meslek Lisesi
61. Çarşıbaşı Denizcilik Meslek Lisesi
62. Hatice Erdem Denizcilik Meslek Lisesi

PİRİ REİS UNIVERSITY

Piri Reis University was established in 2008 in Tuzla, İstanbul with the aid of every Company in the Turkish Maritime Sector. It has an environment-friendly designed green campus, the first one among the universities in Turkey. Piri Reis University, with its high quality training, has been accredited by the international BREEAM Certificate.

MARITIME SECTOR REPORT 2012 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 the years to come.

Phone : 90 212 252 01 30
Fax : 90 212 293 79 35
ahmet.tagmac@denizticaretodasi.org.tr

Turkish Chamber of Shipping

Publication No : 89
ISBN : 978-605-137-317-1

Coordinator
Cpt. Ahmet TAĞMAÇ

Prepared by, ***(in the alphabetic order)***
İpek SAPMAZ
Cpt. Mustafa YAVUZYILMAZ
Nilgün TOK
Cpt. Sertaç YILDIZ
Zehra Engin KÖKNEL



İstanbul & Marmara, Aegean, Mediterranean, Black Sea Regions

TURKISH CHAMBER OF SHIPPING

Meclis-i Mebusan Cad. no:22 Fındıklı - İstanbul / Türkiye
Phone: +90 212 252 01 30 (pbx) Fax : +90 212 293 79 35
www.denizticaretodasi.org.tr