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İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

CHAMBER OF SHIPPING

2016
MARITIME SECTOR REPORT

TURKISH CHAMBER OF SHIPPING

İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

MARITIME SECTOR REPORT 2016

İ S T A N B U L – 2017

FOREWORD

The "TURKISH SHIPPING SECTOR REPORT 2016” 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 31.12.2016 and is presented to our members, Turkish and foreign institutions.

The Report mainly contains eight chapters:

First chapter is on Turkish Merchant Fleet and its yearly developments. The fleet has been analyzed 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 2015. The developments of sabotage 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 2015 and yearly developments.

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

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

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

Eighth chapter explains the maritime training affairs in Turkey.

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

Metin KALKAVAN

Chairman of the Executive Committee

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TURKISH CHAMBER OF SHIPPING

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; ship-owners, 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 OUR CHAMBER IS A MEMBER

National Organizations:

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

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), The International Bunker Industry Association (IBIA), Union Maritime Pour la Mediterrance (UMM).

◈ 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”.**

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THE DEVELOPMENT OF TURKISH SHIPPING

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 GT 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 2016.

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

The 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 567 ships. The examination of the table shows that 293 ships (6.7 million DWT) have been acquired by importation and 274 ships (1.4 million DWT) have been built in Turkey.

Distribution of 567 ships by their types ; 33,66 % dry cargo ships, 14.29 % bulk carriers, 10,05 % chemical tankers, 8,99 % containers and 6,53 % service ships, 26,48 % other types of ships.

Distribution of the fleet by DWT (8,1 Million) ; 48.52 % bulk carriers, 12,78 % dry cargo ships, 14,07 % oil tankers, 12,11 % containers, 5,76 % chemical tankers and 6.76 % other types of ships.

By DWT, 10.14 % of our fleet is registered in National Ship Registry, 89.86 % of fleet is registered in International Ship Registry. By GT, 15.5 % of our fleet is registered in National Ship Registry, 84.5 % of the fleet is registered in International Ship Registry. (Table 2)

The fleet registered in International Ship Registry (7,2 Million Dwt) is composed of bulk carriers (47.7 %), oil tankers (15.6 %), dry cargo vessels (13.5 %), container ships (9.83 %), chemical tankers (6.4 %) and other types of ships (6.97 %). (Table 2)

Table 2 shows Turkish merchant fleet which consists of 567 ships. 14.81 % of total fleet (84 ships) registered in National Ship Registry and 85.19 % of total fleet (483 ships) registered in International Ship Registry.

Hata! Bağlantı geçersiz. ***Source: Turkish Chamber of Shipping -2017***

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

Ship Types	Count				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
DRY CARGO	11	180	191	33,66	52.735	978.412	1.031.147	12,78	34.106	644.130	678.236	11,49
BULK CARRIER	11	70	81	14,29	456.118	3.457.058	3.913.176	48,52	262.689	1.974.941	2.237.630	37,88
CONTAINERS	10	41	51	8,99	263.540	712.954	976.494	12,11	209.810	563.914	773.724	13,1
DRY CARGO/CONTAINERS	1	16	17	3	2.356	120.967	123.323	1,53	1.720	83.949	85.669	1,45
CHEMICAL TANKERS	1	56	57	10,05	1.638	463.289	464.927	5,76	1.082	301.329	302.411	5,12
LPG TANKERS	0	7	7	1,23	0	39.389	39.389	0,49	0	37.227	37.227	0,63
ASPHALT TANKERS	1	2	3	0,53	2.770	39.896	42.666	0,53	1.900	31.348	33.248	0,56
RO-RO SHIPS	0	23	23	4,06	0	232.089	232.089	2,88	0	554.159	554.159	9,38
RO-RO / PASSENGER	2	10	12	2,12	0	25.197	25.197	0,31	10.681	43.742	54.423	0,92
FERRY BOATS	1	33	34	6	2.314	24.428	26.742	0,33	1.596	77.561	79.157	1,34
TRAIN FERRIES	6	0	6	1,06	1.660	0	1.660	0,02	9.835	0	9.835	0,17
PASSENGER AND CARGO SHIP	3	5	8	1,41	3.761	1.226	4.987	0,06	17.189	10.865	28.054	0,48
FISHING BOATS	0	1	1	0,18	0	569	569	0,01	0	1.407	1.407	0,02
RESEARCH SHIPS	0	4	4	0,71	0	5.990	5.990	0,07	0	20.173	20.173	0,34
PASSENGER FERRIES	0	1	1	0,18	0	0	0	0	0	1.043	1.043	0,02
HARBOUR CAR FERRIES	0	7	7	1,23	0	3.536	3.536	0,04	0	8.624	8.624	0,15
TUGS	1	1	2	0,35	0	979	979	0,01	1.565	1.221	2.786	0,05
SERVICE SHIPS	31	6	37	6,53	24.051	7.970	32.021	0,4	279.328	19.248	298.576	5,06
OTHER	1	0	1	0,18	0	0	0	0	1.333	0	1.333	0,02
OIL TANKERS	2	17	19	3,35	7.069	1.128.250	1.135.319	14,07	3.797	594.154	597.951	10,13
TRAIN FERRIES/RO-RO	0	1	1	0,18	0	6.266	6.266	0,08	0	15.195	15.195	0,26
MARINE VEHICLE	2	2	4	0,71	0	0	0	0	78.832	5.662	84.494	1,43
Total :	**84**	**483**	**567**	**100**	**818.012**	**7.248.465**	**8.066.477**	**100**	**915.463**	**4.989.892**	**5.905.355**	**100**

Source : Turkish Chamber of Shipping -2017

The majority of the fleet registered in National Ship Registry (818.012 DWT) is composed of bulk carriers (55.76 %), container (32.21 %), dry cargo ships (6.45 %) and other types of ships (5.57 %).

GRAPH (1): Examination of Registries (GT) (1000 GT and Over)

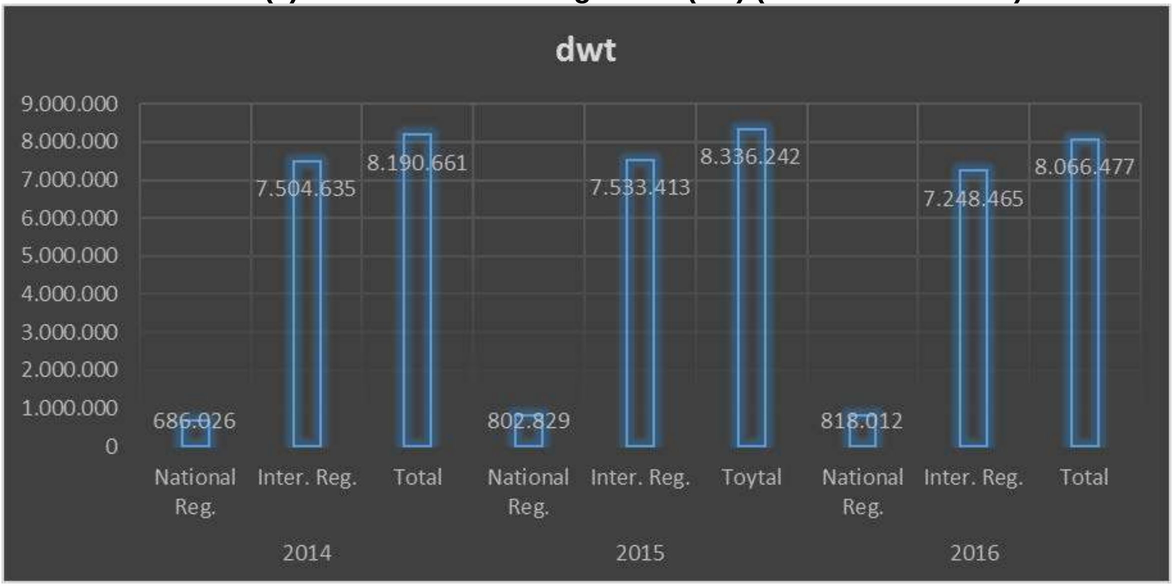


TABLE (3) Examination of Registries (Dwt) 2014-2015-2016

SHIP TYPES	2014 DWT			2015 DWT			2016 DWT		
	National Reg.	**Inter. Reg.**	**Total**	**National Reg.**	**Inter. Reg.**	**Total**	**National Reg.**	**Inter. Reg.**	**Total**
DRY CARGO	44.892	1.153.667	1.198.559	76.368	1.099.945	1.176.313	52.735	978.412	1.031.147
BULK CARRIERS	456.118	3.724.109	4.180.227	456.118	3.604.146	4.060.264	456.118	3.457.058	3.913.176
CONTAINERS	155.194	686.341	841.535	224.283	739.929	964.212	263.540	712.954	976.494
DRY CARGO/CONTAINERS	2.356	113.756	116.112	2.356	120.955	123.311	2.356	120.967	123.323
CONTAINER / RO-RO	0	0	0	0	0	0	0	0	0
OIL TANKERS	7.069	1.009.010	1.016.079	7.069	1.158.532	1.165.601	7.069	1.128.250	1.135.319
CHEMICAL TANKERS	1.638	438.490	440.128	1.638	425.645	427.283	1.638	463.289	464.927
PRODUCT TANKERS	0	0	0	0	0	0	0	0	0
LPG TANKERS	0	30.789	30.789	0	39.389	39.389	0	39.389	39.389
ASPHALT TANKERS	2.770	39.936	42.706	2.770	39.936	42.706	2.770	39.896	42.666
RO-RO SHIPS	0	225.828	225.828	0	232.089	232.089	0	232.089	232.089
RO-RO/PASSERGER	0	19.679	19.679	0	18.471	18.471	0	25.197	25.197
FERRY BOATS	0	7.971	7.971	2.314	19.442	21.756	2.314	24.428	26.742
TRAIN FERRIES	1.660	0	1.660	1.660	0	1.660	1.660	0	1.660
TRAIN FERRY/RO-RO	0	6.266	6.266	0	6.266	6.266	0	6.266	6.266
PASSENGER AND CARGO SHIPS	7.297	3.016	10.313	3.761	9.742	13.503	3.761	1.226	4.987
FISHING BOOT	0	569	569	0	569	569	0	569	569
SCİENTIFIC RESEARCH VESSEL	0	4.200	4.200	0	5.990	5.990	0	5.990	5.990
HARBOUR FERRIES	0	0	0	0	0	0	0	0	0
HARBOUR CAR FERRIES	2.755	19.206	21.961	441	6.291	6.732	0	3.536	3.536
TUGS	0	2.028	2.028	0	2.028	2.028	0	979	979
SERVICE SHIPS	4.277	19.774	24.051	24.051	4.048	28.099	24.051	7.970	32.021
Total :	**686.026**	**7.504.635**	**8.190.661**	**802.829**	**7.533.413**	**8.336.242**	**818.012**	**7.248.465**	**8.066.477**

The Age Profile of Turkish Merchant Fleet

Table 4 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 GT and above comprises of 567 ships. The average age of these ships is 23.85 as of 31.12.2016.

The average age of dry cargo ships is 25 which consists of 12.78 % of the fleet. The average age of bulk carriers is 14 which consists of 48.5 % of the fleet. The average age of container is 14 which consists of 12.10 % of the fleet. The average age of chemical tankers is 16 which consists of 5.76 % of the fleet. The average age of oil tankers are 17 which consists of 14.07 % of the fleet.

TABLE 4: The Average Age Profile of the Turkish Merchant Fleet (1000 GT and Over)

Ship Types	Number	Tonnage (DWT)	Tonnage (GT)	Ave. Age
DRY CARGO	191	1.031.147	678.236	25
BULK CARRIERS	81	3.913.176	2.237.630	14
CONTAINERS	51	976.494	773.724	14
DRY CARGO/CONTAINERS	17	123.323	85.669	19
CHEMICAL TANKERS	57	464.927	302.411	16
LPG TANKERS	7	39.389	37.227	22
ASPHALT TANKERS	3	42.666	33.248	13
RO-RO SHIPS	23	232.089	554.159	15
RO-RO/PASSERGER	12	25.197	54.423	24
FERRY BOATS	34	26.742	79.157	20
TRAIN FERRIES	6	1.660	9.835	43
PASSENGER AND CARGO SHIPS	8	4.987	28.054	25
FISHING BOOT	1	569	1.407	43
SCİENTIFIC RESEARCH VESSEL	4	5.990	20.173	21
HARBOUR FERRIES	1	0	1.043	65
HARBOUR CAR FERRIES	7	3.536	8.624	27
TUGS	2	979	2.786	37
SERVICE SHIPS	37	32.021	298.576	36
OTHERS	1	0	1.333	36
OIL TANKERS	19	1.135.319	597.951	17
TRAIN FERRIES/RO-RO	1	6.266	15.195	38
MARİNE VEHICLE	4	0	84.494	15
Total :	567	8.066.477	5.905.355	23.85

Source:Turkish Cahmber of Shipping - 2017

Table 5 shows Turkish Merchant Fleet by age and tonnage ranges. Turkish Merchant Fleet consists of 567 ships of 8.066.477 DWT.

- 143 ships of 3.387.353 Dwt are between 0-9 age range,
- 143 ships of 2.644.024 Dwt are between 10-19 age range,
- 96 ships of 739.867 Dwt are between 20-29 age range,
- 185 ships of 895.233 Dwt are between 30 and over age range.

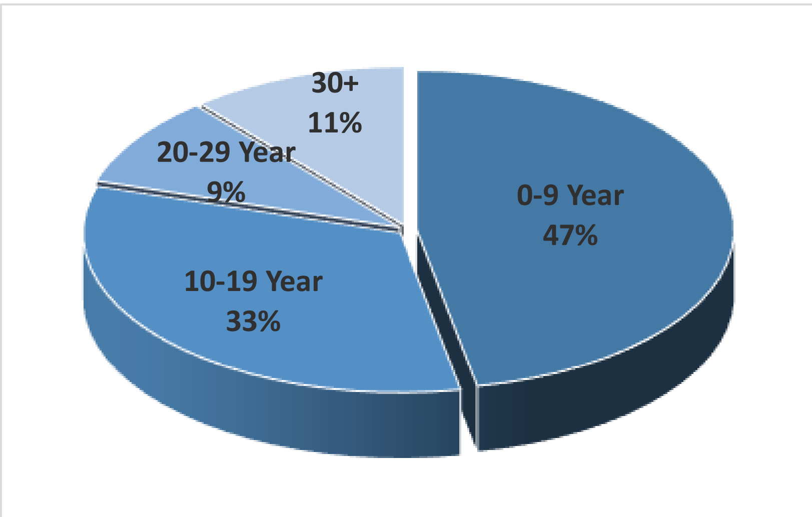
Table (5) Turkish Merchant Fleet Distribution by Tonnage and Age Groups (Dwt) (1000 GT and Over)

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	26	3.188	0,08%	13	5.047	0,19%	16	3.983	0,54%	41	7.294	0,81%	96	19.511
1500-5999	21	85.989	2,27%	38	206.179	7,80%	54	169.421	22,90%	92	343.163	38,33%	234	804.752
6000-9999	17	123.364	3,26%	21	158.146	5,98%	23	135.286	18,29%	19	152.066	16,99%	90	568.863
10000-34999	42	768.802	20,30%	28	666.108	25,19%	14	180.275	24,37%	16	392.710	43,87%	114	2.007.895
35000-52999	3	122.135	3,22%	13	677.754	25,63%	3	178.731	24,16%	0	0	0,00%	20	978.620
53000-79999	23	1.379.613	36,43%	5	285.809	10,81%	0	72171	9,75%	0	0	0,00%	30	1.737.593
80000-119999	6	515.059	13,60%	0	0	0,00%	0	0	0,00%	0	0	0,00%	6	515.059
120000+	5	789.203	20,84%	4	644.981	24,39%	0	0	0,00%	0	0	0,00%	**9**	1.434.184
TOTAL	**143**	**3.787.353**	100,00%	**143**	**2.644.024**	100,00%	**96**	**739.867**	100,00%	**185**	**895.233**	100,00%	**567**	**8.066.477**

Source:Turkish Cahmber of Shipping - 2016

Graph shows age groups of the fleet. 47 % of the fleet are between 0-9 age range, 33 % of the fleet are between 10-19 age range, 9 % of the fleet are between 20-29 age range and 11 % are 30 years and over.

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 6 shows the Dry Cargo segment (191 ships) which is 1.031.147 DWT.

- 39 ships of 185.405 DWT are between 0-9 age range,
- 28 ships of 136.299 DWT are between 10-19 age range,
- 50 ships of 311.059 DWT are between 20-29 age range,
- 83 ships of 398.384 DWT are between 30 and over age range.

Table (6) Dry Cargo Ships by Tonnage and Age Groups (Dwt) **(1000 GT 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
1500-5999	21	97.871	53%	20	76.350	56%	37	124.378	40%	65	223.262	56%	143	521.861
6000-9999	5	32.810	18%	8	59.949	44%	9	67.707	22%	13	95.975	24%	35	256.441
10000-34999	4	54.724	30%	0	0	0%	2	22.283	7%	5	79147	20%	11	156.154
35000-52999	0	0	0%	0	0	0%	2	96.691	31%	0	0	0%	2	96.691
53000-79999	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
120000+	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0
TOTAL	**30**	**185.405**	100%	**28**	**136.299**	100%	**50**	**311.059**	100%	**83**	**398.384**	100%	**191**	**1.031.147**

Source:Turkish Cahmber of Shipping - 2017

18 % of Dry Cargo Ships are between 0-9 age range, 13 % are between 10-19 age range, 30 % are between 20-29 age range, 39 % are 30 years and over.

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

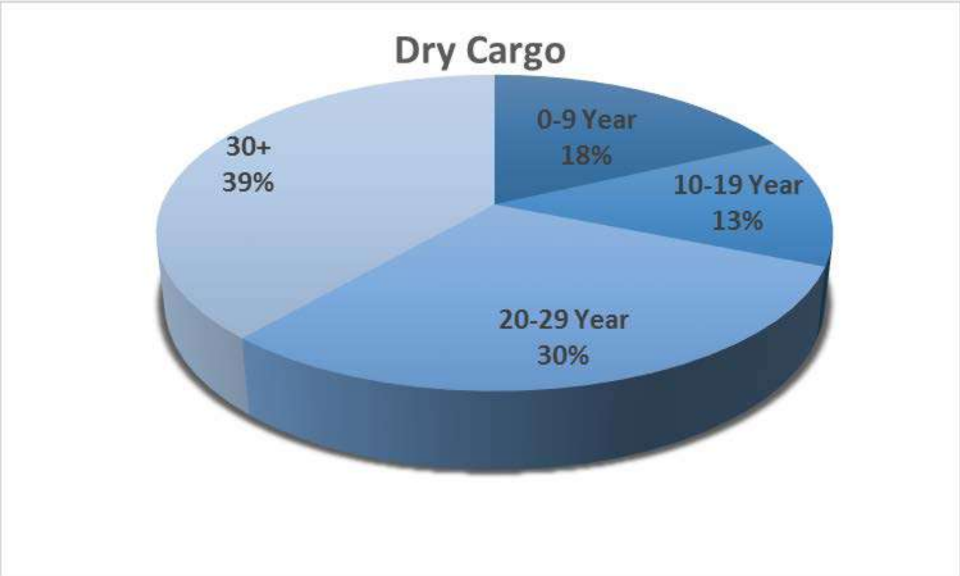


Table 7 shows the bulk carrier segment (81 ships) which is 3.913.176 DWT.

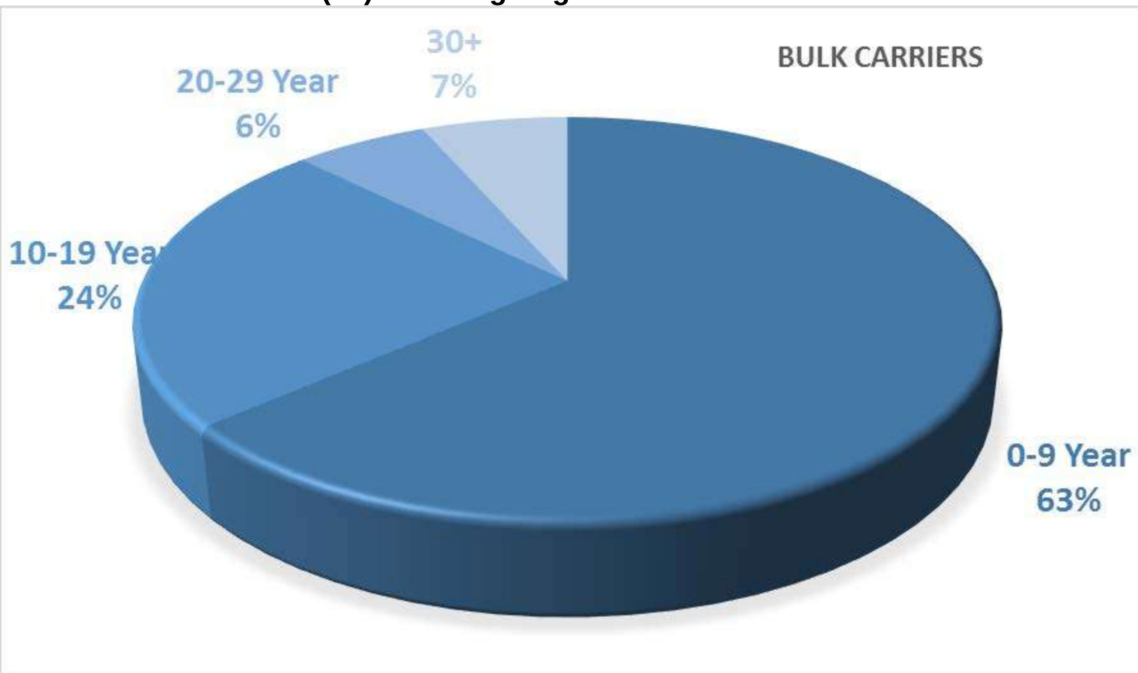
- 41 ships of 2.486.527 DWT are between 0-9 age range,
- 22 ships of 935.657 DWT are between 10-19 age range,
- 7 ships of 233.819 DWT are between 20-29 age range,
- 9 ships of 267.173 DWT are between 30 and over age range.

TABLE (7) Bulk Carrier Ships by Tonnage and Age Groups (Dwt) **(1000 GT 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%	0	0	0,00%	0	0
1500-5999	0	0	0,00%	0	0	0,00%	1	4.468	1,91%	0	0	0,00%	1	4.468
6000-9999	1	6.635	0,27%	0	0	0,00%	0	0	0,00%	0	0	0,00%	1	6.635
10000-34999 (HandySize)	7	176.217	7,09%	7	161.634	17,27%	3	75.140	32,14%	11	257.173	100,00%	28	670.164
35000-52999 (HandyMax)	2	70.603	2,84%	10	488.214	52,18%	2	82.040	35,09%	0	0	0,00%	14	640.857
53000-79000 (Panamax)	23	1.379.613	55,48%	5	285.809	30,55%	1	72.171	30,87%	0	0	0,00%	29	1.737.593
80000-119999 (CapeSize)	6	515.059	20,71%	0	0	0,00%	0	0	0,00%	0	0	0,00%	6	515.059
120000 + (Large Size)	2	338.400	13,61%	0	0	0,00%	0	0	0,00%	0	0	0,00%	2	338.400
TOTAL	**41**	**2.486.527**	**100,00%**	**22**	**935.657**	**100,00%**	**7**	**233.819**	**100,00%**	**11**	**257.173**	**100,00%**	**81**	**3.913.176**

Source:Turkish Cahmber of Shipping - 2016

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



63 % of the bulk carriers are 0-9 age range, 24 % are 10-19 age range, 6 % are 20-29 age range and 7 % are 30 age and over.

Table 8 shows oil tankers segment (19 ships) which is 1.135.319 DWT

- 5 ships of 454.400 DWT are 0-9 age range,
- 9 ships of 665.437 DWT are 10-19 age range,
- 1 ships of 2.829 DWT are 20-29 age range,
- 4 ships of 12.605 DWT are 30 age and over.

TABLE (8) :Oil Tankers by Tonnage and Age Groups (Dwt) (1000 GT 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
1500 - 5999	2	3.597	1%	5	20.456	3%	1	2.878	100%	4	12.605	100%	12	39.535
6000 - 19999	0	0	3%	0	0	0%	0	0	0%	0	0	0%	0	0
20000 – 49999 (Product Tanker)	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0
50000 - 79999 (Panamax)	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0
80000 - 109999 (Aframax)	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0
110000 - 164999 (Suezmax)	3	450.803	96%	4	644.981	97%	0	0	0%	0	0	0%	7	1.095.784
165000 - 299999 (VLCC)	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
Total	**5**	**454.400**	100%	**9**	**665.437**	100%	**1**	**2.878**	100%	**4**	**12.605**	100%	**19**	**1.135.319**

Source:Turkish Cahmber of Shipping - 2017

59 % of the oil tankers are 0-9 age range, 40 % are 10-19 age range and 1 % are 30 age and over.

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

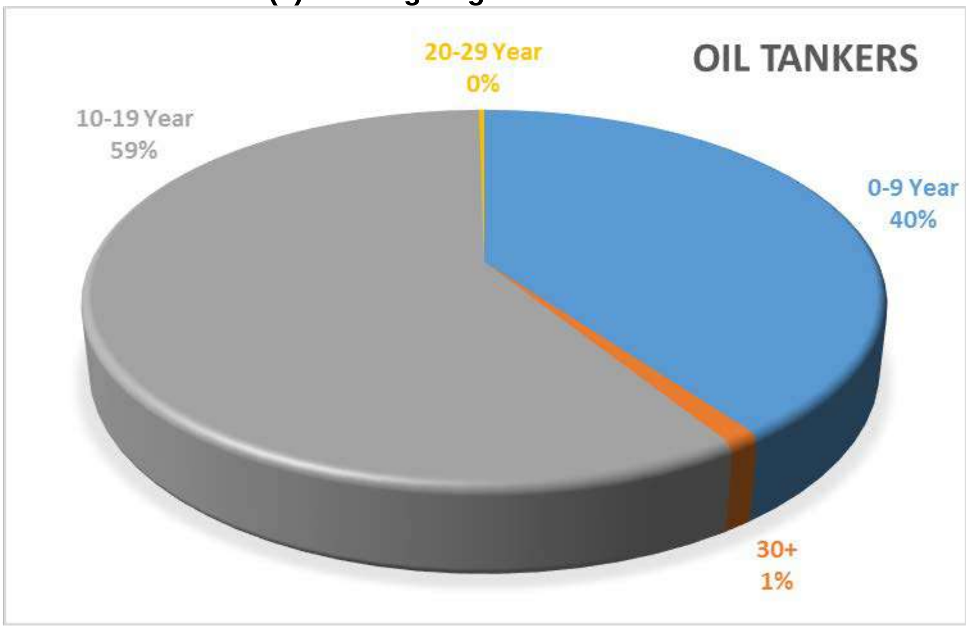


Table 9 shows the average age of the chemical tankers (57 ships) which are 464.927 DWT.

- 29 ships of 288.072 DWT are 0-9 age range,
- 11 ships of 81.549 DWT are 10-19 age range,
- 9 ships of 54.810 DWT are 20-29 age range,
- 8 ships of 40.496 DWT are 30 age and over.

TABLE (9) :Chemical Tankers by Tonnage and Age Groups (Dwt)
(1000 GT 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
1500 - 5999	8	30.807	11%	10	41.550	51%	4	18.215	33%	5	16.898	42%	27	107.470
6000 - 19999	20	205.733	71%	0	0	0%	5	36.595	67%	3	23.598	58%	28	265.926
20000 - 49999 (Product Tanker)	0	0	0%	1	39.999	49%	0	0	0%	0	0	0%	1	39.999
50000 - 79999 (Panamax)	1	51.532	18%	0	0	0%	0	0	0%	0	0	0%	1	51.532
80000 - 109999 (Aframax)	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
165000 - 299999 (VLCC)	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
Total	**29**	**288.072**	100%	**11**	**81.549**	100%	**9**	**54.810**	100%	**8**	**40.496**	100%	**57**	**464.927**

Source:Turkish Cahmber of Shipping - 2017

62 % of other type of tankers are 0-9 age range, 17 % are 10-19 age range, 17 % are 20-29 age range and 9 % are 30 age and over.

GRAPH (6) Average age of Chemical Tankers DWT %

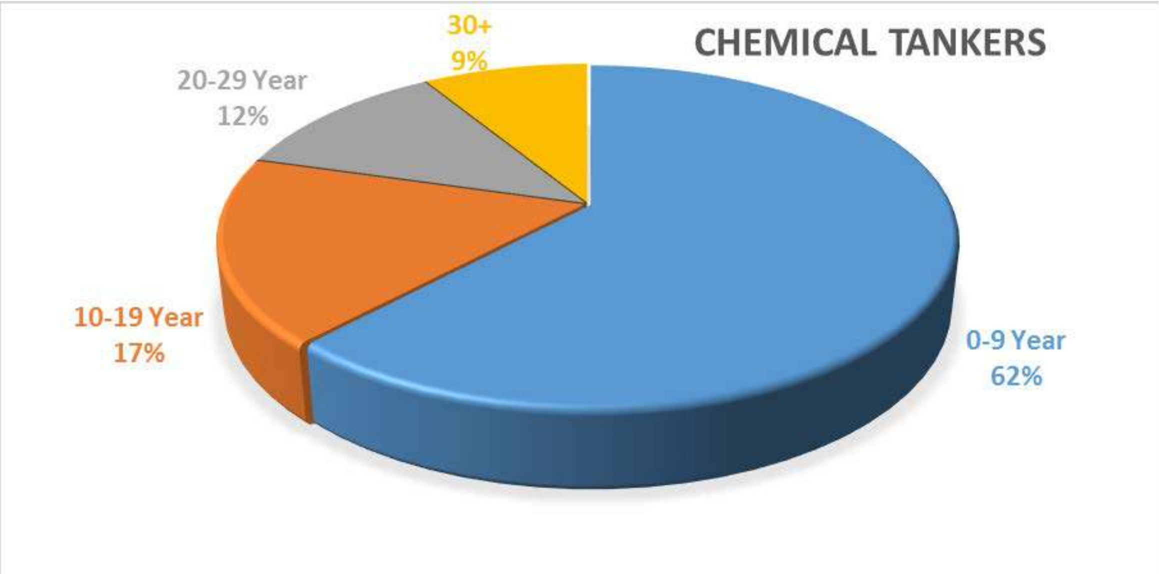


Table 10 shows the average age of the Container ships (51 ships) which are 976.494 DWT.

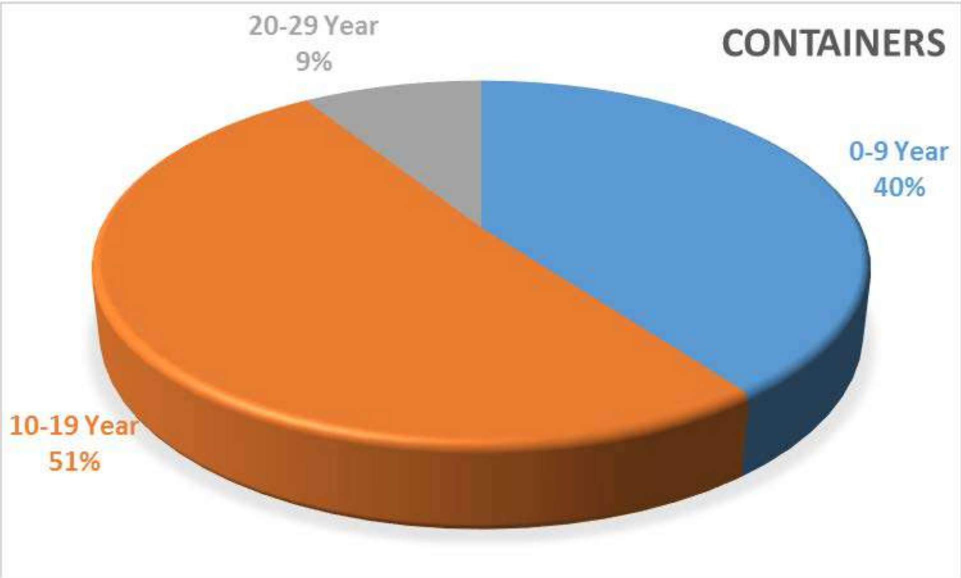
- 16 ships of 389.210 DWT are 0-9 age range,
- 26 ships of 499.313 DWT are 10-19 age range,
- 9 ships of 87.971 DWT are 20-29 age range,

TABLE (10) Container Ships by Tonnage and Age Groups (Dwt) (1000 GT 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%	0	0	0,00%	0	0
1500-5999	1	3.301	0,85%			0,00%	2	9.343	10,62%	0	0	0,00%	3	12.644
6000-9999	0	0	0,00%	4	26.929	5,39%	3	28.405	32,29%	0	0	0,00%	7	55.334
10000-34999	14	347.362	89,25%	19	361.390	72,38%	4	50.223	57,09%	0	0	0,00%	37	758.975
35000-52999	1	38.547	9,90%	3	110.994	22,23%	0	0	0,00%	0	0	0,00%	4	149.541
53000-79999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
80000-119999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
120000+	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
Total	**16**	**389.210**	100,00%	**26**	**499.313**	100,00%	**9**	**87.971**	100,00%	**0**	**0**	**0,00%**	**51**	**976.494**

Source:Turkish Cahmber of Shipping - 2016

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



40 % of Container ships are 0-9 age range, 51 % are 10-19 age range and 9 % are 20-29 age range.

Table 11 shows the average age of the Ro- Ro Ships, (23 ships) which are 232.089 DWT.

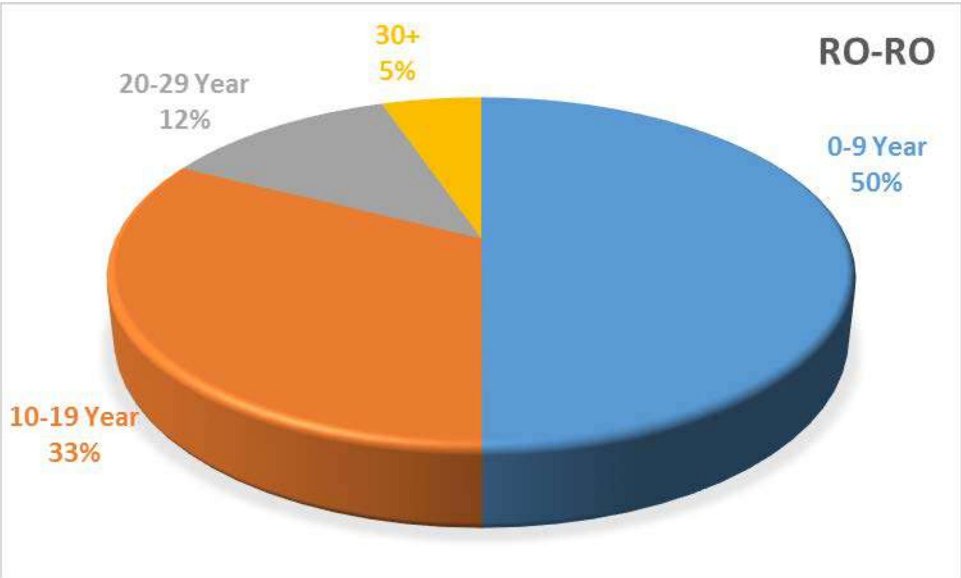
- 10 ships of 115.985 DWT are 0-9 age range,
- 7 ships of 75.502 DWT are 10-19 age range,
- 3 ships of 28.489 DWT are 20-29 age range,
- 3 ships of 12.113 DWT are 30 age range and over.

TABLE (11) Ro-Ro Ships by Tonnage and Age Groups (Dwt) (1000 GT 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%	1	457	1,60%	0	0	0,00%	1	457
1500-5999	0	0	0,00%	0	0	0,00%	0	0	0,00%	3	12.113	100,00%	3	12.113
6000-9999	2	18.570	16,01%	3	29.630	39,24%	0	0	0,00%	0	0	0,00%	5	48.200
10000-34999	8	97.415	83,99%	4	45.872	60,76%	2	28.032	98,40%	0	0	0,00%	14	171.319
35000-52999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
53000-79999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
80000-119999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
120000+	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
Total	**10**	**115.985**	100,00%	**7**	**75.502**	100,00%	**3**	**28.489**	100,00%	**3**	**12.113**	100,00%	**23**	**232.089**

Source:Turkish Cahmber of Shipping - 2016

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



50 % of Ro-Ro Ships are 0-9 age range, 33 % are 10-19 age range, 12 % are 20-29 age range and 5 % 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 585 ships, 13 % of total fleet (77 ships) registered in National Ship Registry and 87 % of total fleet (508 ships) registered in International Ship Registry.

The total DWT and GT values of ships which are 1000 DWT and over are 8.243.549 DWT and 5.516.608 GT. The majority of these tonnage on DWT basis is composed of 47.5 % bulk carriers,13.7 % dry cargo ships, 14.2 % oil tankers, % 5.6 chemical tankers and 11.8 % container ships.

This segment consists of the 93 % of the total fleet on DWT bases. (Table 13)

6 % of the dry cargo segment which is totally 1.129.425 DWT are registered in National Ship Registry, 94 % are registered in International Ship Registry.

12 % of the bulk carrier segment which is totally 3.913.176 DWT are registered in National Ship Registry, 88 % are registered in International Ship Registry.

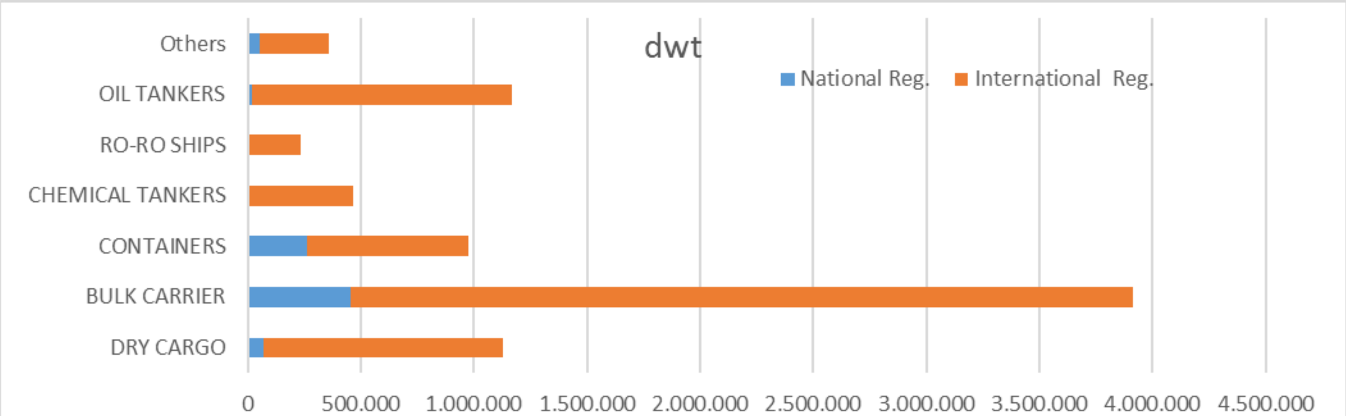
2 % of the oil tanker segment which is totally 1.168.616 are registered in National Ship Registry, 98 % are registered in International Ship Registry.

27 % of the Container Ships which are totally 976.494 DWT are registered in National Ship Registry. 73 % are registered in International Ship Registry.

Chemical Tanker ship segment which is totally 464.927 DWT are 100 % registered in International Ship Registry.

Ro/Ro ship segment which is totally 231.632 DWT are 100 % registered in International Ship Registry.

GRAPH (9) Turkish Fleet According to Registries, 1000 DWT and Over



	DRY CARGO	BULK CARRIER	CONTAINERS	CHEMICAL TANKERS	RO-RO SHIPS	OIL TANKERS	Others
National Reg.	71.232	456.118	263.540	1.638	0	17.825	53.168
International Reg.	1.058.193	3.457.058	712.954	463.289	231.632	1.150.791	306.111

TABLE (12) The General Examination of The Turkish Merchant Fleet by Number And Tonnage According to Import and Built (1000 DWT and over)

SHIP TYPES	Count			DWT			GT		
	Import	Built	Total	Import	Built	Total	Import	Built	Total
DRY CARGO	60	194	254	397.695	731.730	1.129.425	277.428	452.110	729.538
BULK CARRIER	76	5	81	3.762.205	150.971	3.913.176	2.143.250	94.380	2.237.630
CONTAINERS	37	14	51	792.926	183.568	976.494	635.600	138.124	773.724
DRY CARGO/CONTAINERS	6	11	17	23.486	99.837	123.323	16.170	69.499	85.669
CHEMICAL TANKERS	26	31	57	266.643	198.284	464.927	170.662	131.749	302.411
LPG TANKERS	7	0	7	39.389	0	39.389	37.227	0	37.227
ASPHALT TANKERS	1	2	3	2.770	39.896	42.666	1.900	31.348	33.248
WATER BARGES	0	1	1	0	1.027	1.027	0	488	488
RO-RO SHIPS	22	0	22	231.632	0	231.632	550.379	0	550.379
RO-RO FERRY-PASSENGER	6	2	8	25.197	2.727	27.924	36.177	1.974	38.151
FERRY BOATS	1	9	10	1790	17.168	18.958	10870	13.281	24.151
TRAIN FERRIES	0	1	1	0	1.300	1.300	0	1.233	1.233
PASSENGER AND CARGO SHIPS	1	1	2	1.540	1.700	3.240	4.701	10.583	15.284
SCIENTIFIC RESEARCH VESSEL	1	1	2	1.790	4.200	5.990	10.870	2.569	13.439
SEA BUSES	1	0	1	29.642	0	29.642	431	0	431
HARBOUR CAR FERRIES	0	1	1	0	1.562	1.562	0	1.077	1.077
TUGS	12	11	23	41.660	14268	55.928	33.102	5253	38.355
OIL TANKERS	14	28	42	1.108.347	60.269	1.168.616	581.389	36.615	618.004
TRAIN FERRY/RO-RO	1	0	1	6.266	0	6.266	15.195	0	15.195
MARINE VEHICLE	0	1	1	0	2064	2.064	0	974	974
TOTAL :	272	313	585	6.732.978	1.510.571	8.243.549	4.525.351	991.257	5.516.608

Source: Turkish Chamber of Shipping - 2017

TABLE (13) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 DWT and over)

SHIP TYPES	COUNT			DWT			GT		
	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total
DRY CARGO	25	229	254	71.232	1.058.193	1.129.425	44.598	684.940	729.538
BULK CARRIER	11	70	81	456.118	3.457.058	3.913.176	262.689	1.974.941	2.237.630
CONTAINERS	10	41	51	263.540	712.954	976.494	209.810	563.914	773.724
DRY CARGO/CONTAINERS	1	16	17	2.356	120.967	123.323	1.720	83.949	85.669
CHEMICAL TANKERS	1	56	57	1.638	463.289	464.927	1.082	301.329	302.411
LPG TANKERS	0	7	7	0	39.389	39.389	0	37.227	37.227
ASPHALT TANKERS	1	2	3	2.770	39.896	42.666	1.900	31.348	33.248
WATER BARGES	0	1	1	0	1.027	1.027	0	488	488
RO-RO SHIPS	0	22	22	0	231.632	231.632	0	550.379	550.379
RO-RO FERRY-PASSENGER	0	8	8	0	27.924	27.924	0	38.151	38.151
FERRY BOATS	1	9	10	2.314	16.644	18.958	1.596	22.555	24.151
TRAIN FERRIES	1	0	1	1.300	0	1.300	1.233	0	1.233
PASSENGER AND CARGO SHIPS	2	0	2	3.240	0	3.240	15.284	0	15.284
SCIENTIFIC RESEARCH VESSEL	0	2	2	0	5.990	5.990	0	13.439	13.439
SEA BUSES	0	1	1	0	29.642	29.642	0	431	431
HARBOUR CAR FERRIES	0	1	1	0	1.562	1.562	0	1.077	1.077
TUGS	14	9	23	39.124	16.804	55.928	27.333	11.022	38.355
OIL TANKERS	9	33	42	17.825	1.150.791	1.168.616	10.356	607.648	618.004
TRAIN FERRY/RO-RO	0	1	1	0	6.266	6.266	0	15.195	15.195
MARINE VEHICLE	1	0	1	2.064	0	2.064	974	0	974
Total :	**77**	**508**	**585**	**863.521**	**7.380.028**	**8.243.549**	**578.575**	**4.938.033**	**5.516.608**

Source: Turkish Chamber of Shipping - 2017

TABLE (14) The Average Age Profile of the Turkish Merchant Fleet (1000 DWT and Over)

Ship Types	No	DWT	GT	Ave. Age
DRY CARGO	254	1.129.426	729.538	30
BULK CARRIER	81	3.913.176	2.237.630	14
CHEMICAL TANKERS	57	464.927	302.411	16
CONTAINERS	51	976.494	773.724	14
OIL TANKERS	42	1.168.616	618.004	18
SERVICE SHIPS	23	55.928	38.355	33
RO-RO SHIPS	22	231.632	550.379	15
DRY CARGO/CONTAINERS	17	123.323	85.669	19
FERRY BOATS	10	18.958	24.151	27
RO-RO FERRY-PASSENGER	8	27.924	38.151	33
LPG TANKERS	7	39.389	37.227	22
PASSENGER AND CARGO SHIPS	2	3.240	15.284	56
ASPHALT TANKERS	3	42.666	33.248	13
SCIENTIFIC RESEARCH VESSEL	2	5.990	13.439	18
HARBOUR CAR FERRIES	1	1.562	1.077	46
SEA BUSES	1	29.642	431	28
TRAIN FERRIES	1	1.300	1.233	51
WATER BARGES	1	1.027	488	48
TRAIN FERRY/RO-RO	1	6.266	15.195	38
MARINE VEHICLE	1	2.064	974	1
TOTAL	**585**	**8.243.549**	**5.516.607**	**27**
Source: Turkish Chamber of Shipping - 2017				

TABLE (15) Turkish Merchant Fleet Distribution by Tonnage and Age Groups (1000 dwt and over)

DIVISIONS OF TONNAGE	0-9 Years			10-19 Years			20-29 Years			30+over			Total	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	2	2.251	0%	6	8.184	0%	13	16.741	2%	44	55.599	6%	65	82.775
1500-5999	31	103.379	3%	52	207.680	8%	51	177.887	23%	136	399.972	40%	270	888.919
6000-9999	17	123.364	3%	20	158.146	6%	17	135.286	17%	21	152.066	15%	75	568.863
10000-34999	42	768.802	20%	35	666.108	25%	13	209.917	27%	19	392.710	39%	109	2.037.537
35000-52999	3	122.135	3%	15	677.754	26%	4	178.731	23%	0	0	0%	22	978.620
53000-79999	23	1.379.613	36%	5	285.809	11%	1	72.171	9%	0	0	0%	29	1.737.593
80000-119999	6	515.059	14%	0	0	0%	0	0	0%	0	0	0%	6	515.059
120000+	5	789.203	21%	4	644.981	24%	0	0	0%	0	0	0%	9	1.434.184
Genel Toplam :	**129**	**3.803.807**	100%	**137**	**2.648.663**	100%	**99**	**790.733**	100%	**220**	**1.000.347**	100%	**585**	**8.243.549**

The Position of The Turkish Merchant Fleet Within the World Fleet

In 2017 our tonnage under foreign flags is 21,5 million DWT, as of 1 January 2017, concerning the ships of 1000 GT and above, the total tonnage of the Turkish ship-owners, both under Turkish flag and foreign flags is 29.3 million DWT.

As of the beginning of 2017, regarding the Turkish Ship owners' ships of 1000 GT and above, 26,6 % percent of these ships are registered under Turkish flag and 73,4 % are registered under foreign flags.

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

Year	National Flag			Foreign Flag			Total Fleet Controlled	
	No	1000 DWT	%	No	1000 DWT	%	No	1000 DWT
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
2014	599	8.580	28,2	890	21.846	71,8	1.489	30.427
2015	564	8.297	30,2	834	19.209	69,8	1.398	27.507
2016	**551**	**8.272**	**35.9**	**984**	**20.879**	**64.1**	**1.535**	**29.151**
2017	**525**	**7.800**	**26,6**	**1022**	**21.465**	**73,4**	**1.547**	**29.265**

Source: ISL January-February 2017

GRAPH (10) Progress of the Turkish Merchant Fleet

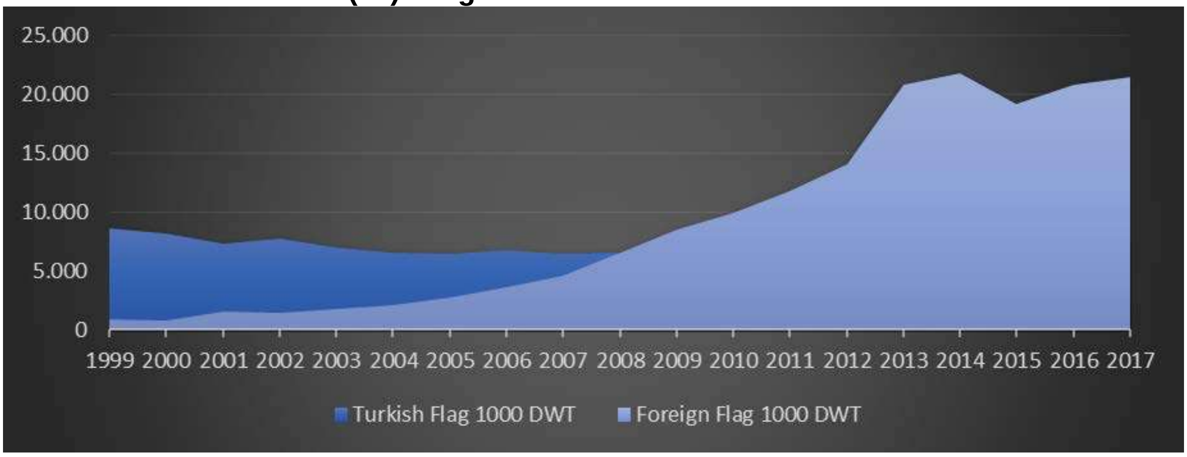


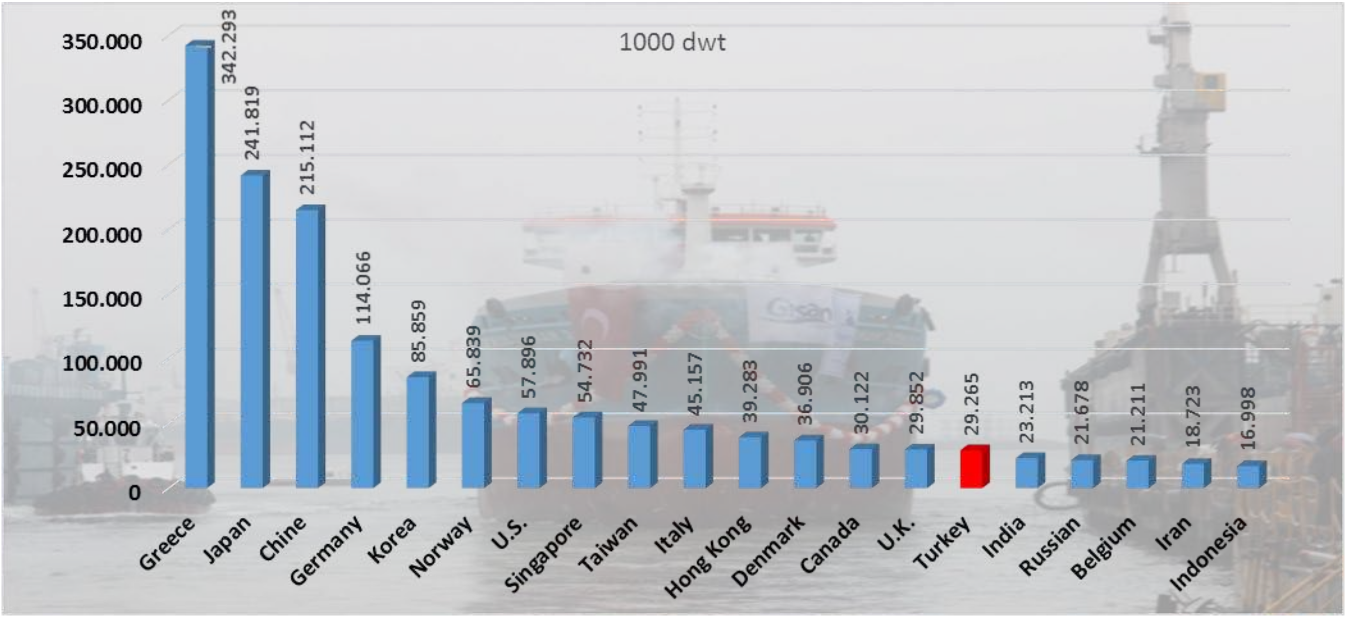
TABLE (17) Total Fleet of the 30 Countries by National and Foreign Flags
(01 January 2017) ***(1000 GT and over)***

Dwt Rank	Country	National Flag		International Flag		Total Flag	
		No	1000 DWT	No	1000 DWT	No	1000 DWT
1	Greece	733	70.329	3.791	271.964	4.524	342.293
2	Japan	792	31.085	3.380	210.734	4.172	241.819
3	Chine	2.621	73.470	2.352	141.642	4.973	215.112
4	Germany	207	10.277	2.966	103.789	3.173	114.066
5	Korea	720	13.483	952	72.376	1.672	85.859
6	Norway	515	16.755	1.099	49.084	1.614	65.839
7	USA	203	4.936	931	52.960	1.134	57.896
8	Singapore	700	26.906	676	27.826	1.376	54.732
9	Taiwan	107	4.312	801	43.679	908	47.991
10	Italy	473	13.900	597	31.257	1.070	45.157
11	Hong Kong	481	26.864	425	12.419	906	39.283
12	Denmark	321	15.604	518	21.302	839	36.906
13	Canada	113	925	387	29.197	500	30.122
14	U.K.	209	7.055	498	22.797	707	29.852
15	**Turkey**	**525**	**7.800**	**1.022**	**21.465**	**1.547**	**29.265**
16	India	605	15.467	139	7.746	744	23.213
17	Russian	1.069	6.280	383	15.398	1.452	21.678
18	Belgium	61	7.103	147	14.108	208	21.211
19	Iran	151	5.811	58	12.912	209	18.723
21	Indonesia	1.585	14.965	105	2.033	1.690	16.998
20	France	110	3.120	207	12.468	317	15.588
22	Saudi Arabia	84	3.417	67	12.050	151	15.467
23	UAE	48	319	489	14.869	537	15.188
24	Malaysia	211	6.482	105	6.802	316	13.284
25	Netherland	608	5.210	320	6.557	928	11.767
26	Kuwait	34	5.117	67	6.221	101	11.338
27	Qatar	18	701	84	9.367	102	10.068
28	Switzerland	50	1.758	148	7.412	198	9.170
29	Bermuda	0	0	47	9.045	47	9.045
30	Vietnam	775	6.549	94	1.264	869	7.813
Total 30 Countries		**14.129**	**406.000**	**22.855**	**1.250.743**	**36.984**	**1.656.743**
World Total						42.486	1.763.694

Table 17 shows the first 30 countries which own the largest merchant fleet in the world scale. 94 % of the World fleet (1000 GT and over) of 1.6 Billion DWT, is being Kontrolled by the following countries as of 1 January 2017.

The biggest fleets with open registry flags (1000 GT 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 15th row.

GRAPH (11) By Country of Domicile as of 1 January 2017



The World fleet (300 GT and over) is 52.183 ships of 1.772.435.000 DWT based on 157 countries as of 01.01.2017. The position of Turkish merchant fleet is shown in the Table as being on 23st place in World ranking

Panama, having a share of 18.8 % is in the first place, Liberia, having a share of 12,1 % is in the second place, Marshall Island, having a share of 11.8 % is in the third place.

GRAPH (12) : World merchant fleet ranking byTurkish Flag

TABLE (18) World Merchant Fleet Ranking by Flag as of January 1st, 2017
(300 GT and over)

DWT Rank	Flag	No of Ships	1000 GT	1000 DWT	1000 TEU
1	Panama	6.480	216.522	333.363	3.214
2	Liberia	3.126	136.331	213.934	3.896
3	Marshall Island	2.892	127.950	208.563	1.179
4	Hong Kong	2.420	106.744	172.420	2.702
5	Singapore	2.328	80.698	121.177	2.166
6	Malta	2.016	65.654	98.669	1.419
7	Chine	3008	47.904	74.918	686
8	Greece	963	42.262	74.493	52
9	Bahamas	1.160	53.644	68.057	199
10	U.K.	757	29.002	38.896	843
11	Japan	419	13.914	14.485	703
12	S. Cypres	338	15.087	24.412	141
13	Norway	2620	23.262	33.782	63
14	Indonesia	797	20.864	33.000	438
15	Denmark	788	15.088	19.069	57
16	India	420	1.562	1.422	6
17	Italy	368	13.526	17.647	52
18	Korea,Rep of	2.915	12.189	17.131	184
19	Portugal	460	15.002	16.940	984
20	Germany	132	608	627	7
21	Antiqua & Barbuda	328	14.393	16.313	978
22	Bermuda	850	9.596	16.451	44
23	**Turkey**	**710**	**15.498**	**15.347**	**128**
24	U.S	1045	9.859	14.654	101
25	Belgium	352	10.417	13.712	644
World Total	**157 Countries**	**52.183**	**1.182.691**	**1.772.435**	**22.327**

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.

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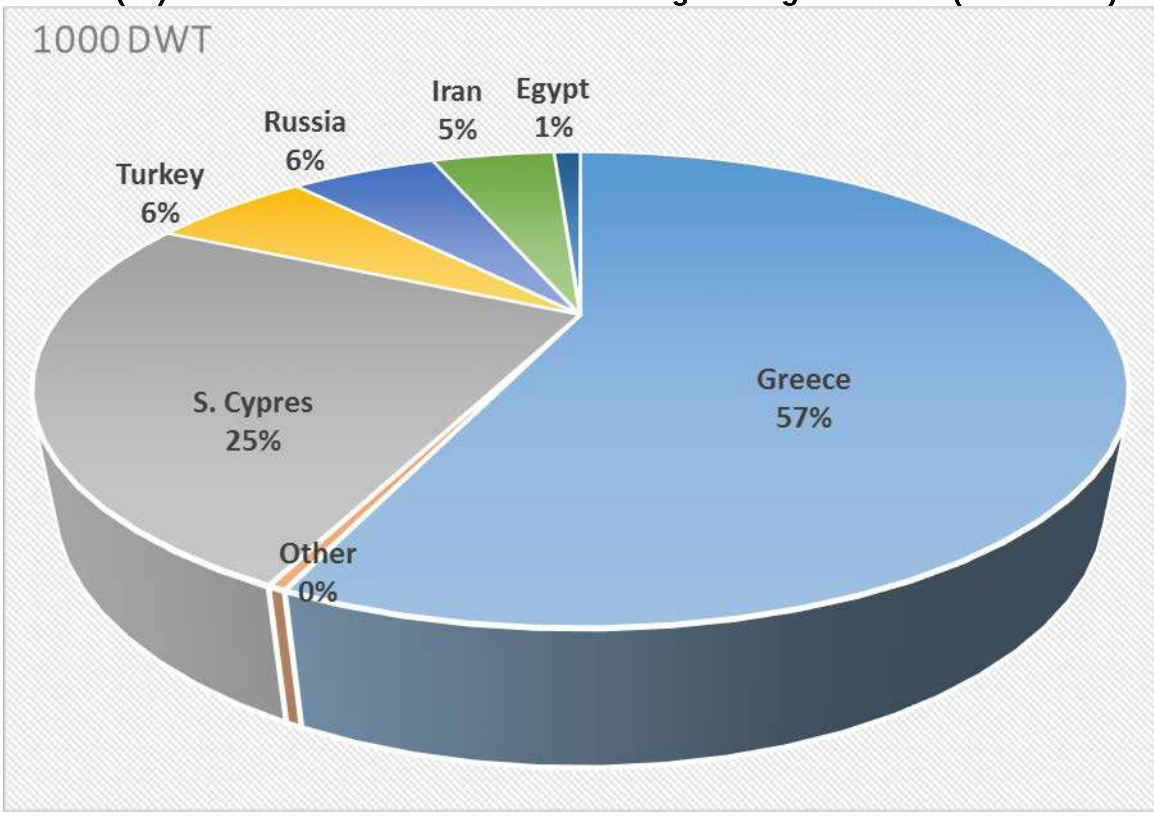
TABLE (19): Turkish Merchant Fleet and the Neighboring Countries (01.01 2017)

(300 GT and over)

World dwt rank	Country	No	1000 DWT	World Share %	Change Rate %
8	Greece	963	74.493	4,20%	1,90%
12	S. Cypres	797	33.000	1,90%	1,40%
23	Turkey	834	8.102	0,50%	-0,50%
26	Russia	1.441	7.580	0,40%	3,40%
31	Iran	378	6.463	0,40%	39,50%
53	Egypt	90	1.399	0,10%	3,30%
87	Ukrania	106	287	0	-17,70%
103	Bulgaria	28	111	0	-3,90%
116	Georgia	17	60	0	78,00%
118	Syria	8	58	0	-5,20%
128	Romania	15	37	0	0,00%

Source: ISL January-February 2017

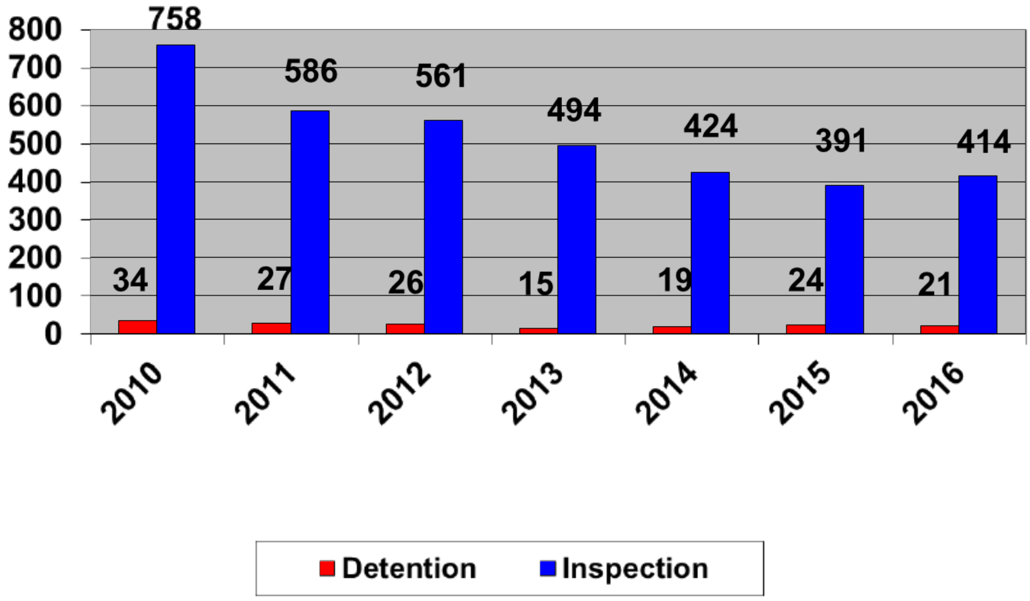
GRAPH (13) Turkish Merchant Fleet and the Neighboring Countries (01.01 2017)



Port State Control Applications

Turkey is still in the White List. Our Chamber, together with Maritime administration is making every effort to preserve our fleet's high quality and aims to upgrade its place on the white list. The Port State Control (PSC) is still being used in eight different geographical areas of the world, as well as for our ships. These controls are used in our country, too, and the studies in this matter continues meticulously. Within this context, Turkey has become a member of the Mediterranean and Black Sea Memorandums (MoU) and is taking any measures to prevent unfair competition and increase quality in shipping. Therefore, we continue to control entries of non-standard vessels to our territorial waters and apply necessary controls. For this reason, the requirements of the international legislations such as SOLAS, MARPOL, SCTW, ISPS and ISM are being applied effectively. Detention rates of Turkish ships in foreign ports under the scope of Paris MoU is decreasing each year and it was taken in White List in 2008. When we look at the detention numbers, it was 40 in 2008, 34 in 2009, 34 in 2010, 27 in 2011, 26 in 2012, 15 in 2013, 19 in 2014, 24 in 2015 and 21in 2016.

GRAPH(14):Turkish Flagged Vessels Yearly Inspection / Detentions (Paris MoU)

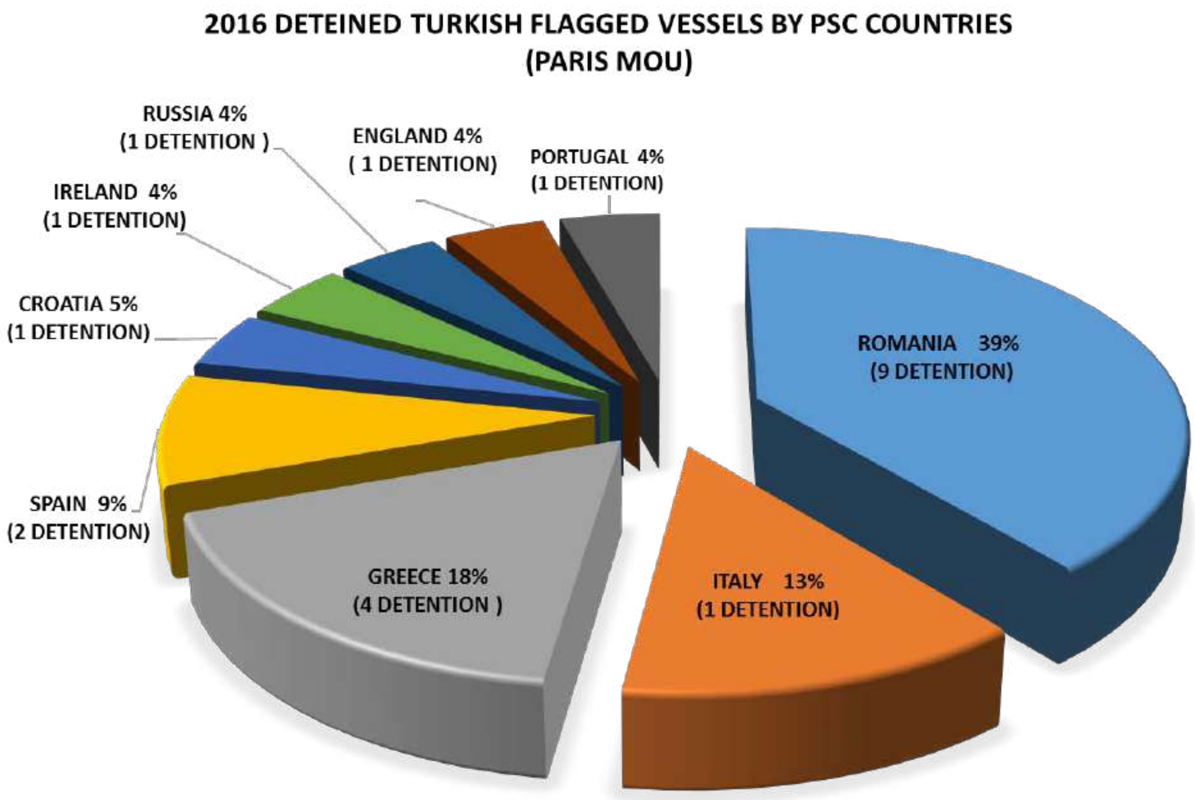


Source: Paris MoU

According to statics given by Paris MoU, common detention's causes occurs due to following reasons;

- ISM Related Deficiencies
- Fire Safety Measures,
- Live Saving appliances,
- Safety of Navigation,
- Ship Certificates and Documents.

GRAPH (15):



21 Turkish Flagged Vessels detained in 2016 according to Paris MoU

CARGOES

CHAPTER II

DEVELOPMENT OF TONNAGE CARRIED WORD AND BY TURKISH MERCHANT FLEET IN 2016

The Developments in the Transportation of Foreign Trade Cargoes

2017 is a projection. *Trends calculated using an average of the 5 or 10 year period up to and including the current year, or a compound average growth rate over the period. Estimated share of total world trade in 2016 (mt): sea 84%, land (road+rail) 16%, air <1%.

TABLE (20) World Total Trade And World Seaborn Trade

Year	World Total Trade (all modes) Billion Tonnes	World Transport Change (%)	World Seaborn Trade Billion Tonnes	Seaborn Trade as % of Total
2008	10,86	-	8,61	79,00%
2009	9,56	-12%	8,29	87,00%
2010	10,82	13%	9,07	85,00%
2011	11,54	7%	9,47	83,00%
2012	11,83	3%	9,88	84,00%
2013	12,19	3%	10,21	84,00%
2014	12,58	3%	10,54	84,00%
2015	12,88	3%	10,77	84,00%
2016	13,18	4%	11,1	84,00%
2017(*)	**13.55**	**3%**	**11,34**	**84.00%**
(*)approximate value (**)predicted value)				

Source : *Clarksons Research Feb.2016*

GRAPH (16) World Total Trade And World Seaborn Trade

TABLE (21) Turkish Foreign Trade Transportation by Modes (%)

Years	Sea	Rail	Road	Air	Pipeline and Others
2006	87,4	1,1	10,4	0,1	1
2007	87,4	1,1	10	0,6	0,9
2008	86,5	1,1	10,7	0,7	1
2009	85	0,8	12,6	0,8	0,8
2010	85,6	0,8	12,5	0,3	0,8
2011	85,8	0,8	11,8	0,4	1,2
2012	87	0,6	10,7	0,4	1,4
2013	86,4	0,5	11,4	0,4	1,3
2014	86,2	0,4	11,2	0,5	1,7
2015	87,7	0,5	10,7	0,4	0,7
2016	**88,06**	**0,46**	**10,76**	**0,32**	**0,4**

Source: Turkstat

88,06 % of the Turkey's foreign trade is being realised by maritime transportation. The progress of transportation between the years of 2006-2016 is shown in the Table below by the modes of transportation.

61 % of the volume of Turkey's foreign trade transportation has been carried by sea, 24,26 % has been carried by road, 0,64 % has been carried by rail, 12,49 % has been carried by air and 1,61 % has been carried by other transportation modes.

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

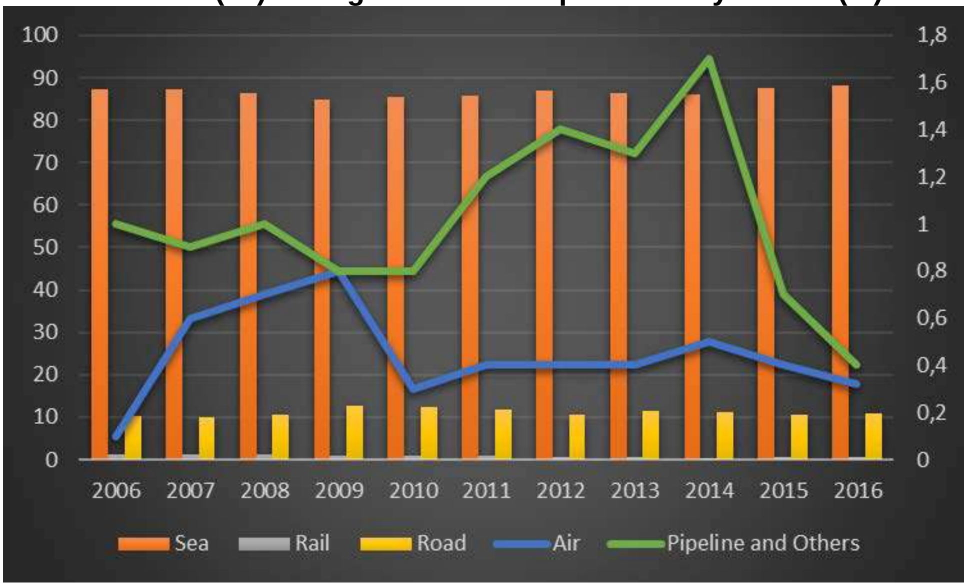


TABLE (22):Foreign Trade Transportation by Modes (mton) and ($)

	Year	By Modes	Quantity mton %	Value US $ %
EXPORT	2016	Rail	0,52%	0,45%
		Sea	**73,99%**	**55,01%**
		Pipeline and Others	0,23%	0,69%
		Air	0,81%	12,45%
		Road	24,45%	31,40%
			100,00%	100,00%
IMPORT	2016	Rail	0,43%	0,78%
		Sea	**95,32%**	**65,66%**
		Pipeline and Others	0,49%	2,32%
		Air	0,06%	12,53%
		Road	3,71%	18,71%
			100,00%	100,00%
TOTAL				
	2016	Rail	0,46%	0,64%
		Sea	**88,06%**	**61,00%**
		Pipeline and Others	0,40%	1,61%
		Air	0,32%	12,49%
		Road	10,76%	24,26%
			100,00%	100,00%

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 2006-2016 is shown below:

- In 2012, the number of incoming vessels increased by 1 % when compared with 2011,
- In 2013, the number of incoming vessels decreased by 0.3% when compared with 2012.

- In 2014, the number of incoming vessels decreased by 1.8 % when compared with 2013.
- In 2015, the number of incoming vessels decreased by 1,4 % when compared with 2014.
- In 2016, the number of incoming vessels decreased by 3,3 % when compared with 2015,

TABLE (23) The Number of Incoming Ships to the Turkish Ports

Years	Turkish Flag Number	Foreign Flag Number	Total Number	Change %	TF %	FF %
2006	42.058	33.461	75.519	-	55,69%	44,31%
2007	43.662	35.262	78.924	4,51%	55,32%	44,68%
2008	45.362	36.042	81.404	3,14%	55,72%	44,28%
2009	45.813	34.631	80.444	-1,18%	56,95%	43,05%
2010	37.060	37.055	74.115	-7,87%	50,00%	50,00%
2011	37.234	37.900	75.134	1,37%	49,56%	50,44%
2012	38.333	37.542	75.875	0,99%	50,52%	49,48%
2013	39.835	36.295	76.130	0,34%	52,32%	47,68%
2014	38.685	36.081	74.766	-1,79%	51,74%	48,26%
2015	38.397	35.288	73.685	-1,45%	52,11%	47,89%
2016	37.644	33.576	71.220	-3,35%	52,86%	47,14%

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

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

TABLE (24) Numbers of Incoming Ships to the Turkish Ports in 2016

Port Authority	Turkish Flag		Foreign Fag		Total	
	Ship Number	Gross Ton	Ship Number	Gross Ton	Ship Number	Gross Ton
İZMİT	4.519	20.882.699	5.672	113.661.997	10.191	134.544.696
AMBARLI	2.197	18.701.957	2.326	69.086.135	4.523	87.788.092
ALİAĞA	1.730	11.092.874	3.229	60.399.635	4.959	71.492.509
MERSİN	967	11.560.145	3.194	53.882.314	4.161	65.442.460
GEMLİK	1.805	10.692.675	2.187	50.151.128	3.992	60.843.803
BOTAŞ	200	2.314.175	1.217	52.711.814	1.417	55.025.990
İSKENDERUN	1.559	5.998.443	2.387	48.640.815	3.946	54.639.258
TEKİRDAĞ	1.007	4.388.182	1.246	31.601.405	2.253	35.989.587
İZMİR	634	5.800.810	1.548	26.910.901	2.182	32.711.711
TUZLA	2.295	15.561.230	1.040	10.938.243	3.335	26.499.473
İSTANBUL	2.182	9.179.448	803	11.257.823	2.985	20.437.271
KUŞADASI	422	64.002	527	13.693.619	949	13.757.621
SAMSUN	853	3.022.999	1.496	8.824.244	2.349	11.847.243
KARADENİZ EREĞLİSİ	545	2.183.082	331	6.063.063	876	8.246.145
KARABİGA	868	1.687.902	401	6.475.040	1.269	8.162.942
ANTALYA	465	1.875.865	398	6.234.663	863	8.110.528
ÇEŞME	1.378	4.737.075	534	1.508.987	1.912	6.246.061
ZONGULDAK	269	1.070.037	266	4.856.953	535	5.926.990
YALOVA	989	978.378	394	4.792.762	1.383	5.771.140
BANDIRMA	882	1.464.401	688	4.138.543	1.570	5.602.944
TAŞUCU	112	222.613	860	5.086.212	972	5.308.825
GÜLLÜK	439	1.918.719	337	2.439.595	776	4.358.314
TRABZON	374	1.272.230	438	2.856.016	812	4.128.246
ÇANAKKALE	1.400	1.573.887	149	2.213.615	1.549	3.787.502
BODRUM	1.206	236.430	411	2.555.439	1.617	2.791.869
MARMARA A.	791	705.868	83	393.017	874	1.098.885
ÜNYE	405	583.516	118	484.777	523	1.068.293
MARMARİS	416	165.602	185	895.025	601	1.060.627
BARTIN	159	348.795	162	625.008	321	973.803
HOPA	481	293.075	125	566.064	606	859.139
RİZE	219	440.852	49	269.698	268	710.550
DİKİLİ	96	49.877	106	510.446	202	560.323
BOZCAADA	147	57.151	20	399.379	167	456.530
TİREBOLU	90	341.093	7	29.438	97	370.531
İNEBOLU	183	190.307	49	145.705	232	336.012
ALANYA	26	754	13	329.515	39	330.269
FETHİYE	264	24.028	350	289.370	614	313.398
AYVALIK	800	252.278	0	0	800	252.278
FATSA	61	29.961	63	160.354	124	190.315
GİRESUN	72	34.320	33	114.215	105	148.535
KAŞ	522	75.727	5	72.601	527	148.328
ERDEK	185	82.851	0	0	185	82.851
MUDANYA	131	65.830	1	1.592	132	67.422
GÖCEK	108	59.926	9	5.575	117	65.501
SİNOP	92	15.808	7	27.420	99	43.228
GÖKÇEADA	157	41.728	0	0	157	41.728
AMASRA	105	38.843	0	0	105	38.843

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

Port Authority	Turkish Flag		Foreign Fag		Total	
	Ship Number	Gross Ton	Ship Number	Gross Ton	Ship Number	Gross Ton
TURGUT REİS LİMAN BAŞKANLIĞI	232	23.999	98	2.822	330	26.820
SÜRMENE	126	25.439	3	615	129	26.054
GERZE	218	22.922	0	0	218	22.922
SİLİVRİ	96	22.663	0	0	96	22.663
KARATAŞ	677	17.567	0	0	677	17.567
EDREMİT	321	15.397	0	0	321	15.397
ENEZ	218	15.383	0	0	218	15.383
VAKFIKEBİR	52	13.658	0	0	52	13.658
ŞİLE	114	9.419	1	2.506	115	11.925
FOÇA	128	10.139	0	0	128	10.139
KARASU	70	5.484	1	2.597	71	8.081
PAZAR	43	7.849	0	0	43	7.849
KEFKEN	124	6.964	0	0	124	6.964
ORDU	40	5.846	0	0	40	5.846
İĞNEADA	45	4.206	0	0	45	4.206
CİDE	34	3.678	0	0	34	3.678
GÖRELE	14	3.671	0	0	14	3.671
AYANCIK	56	3.570	0	0	56	3.570
DATÇA	21	2.245	9	1.255	30	3.500
MANAVGAT	31	1.949	0	0	31	1.949
KEMER	115	1.243	0	0	115	1.243
ANAMUR	27	902	0	0	27	902
FİNİKE	35	425	0	0	35	425
TOPLAM	**37.644**	**142.603.067**	**33.576**	**606.309.954**	**71.220**	**748.913.021**

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

Cabotage Transportation

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

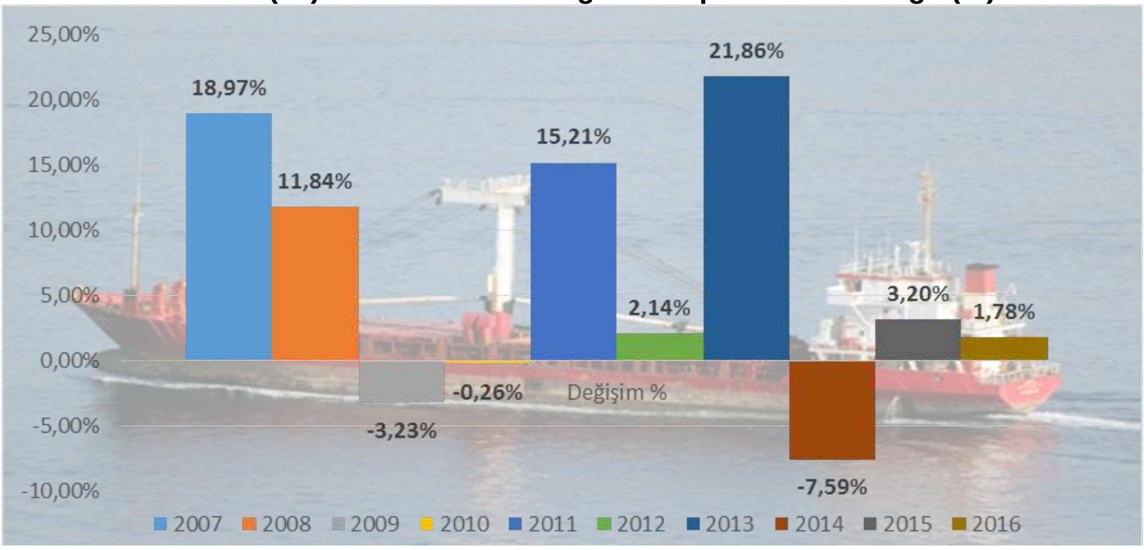
The amounts of cargoes carried bulk and partial cargoes between 2006- 2016 in Turkish ports and wharves on ton basis are at the Table ….

TABLE (25) 2006-2016 Cabotage Transportation

Year	Cabotage mton	Change %
2006	15.133.337	-
2007	18.004.619	18,97%
2008	20.136.037	11,84%
2009	19.485.900	-3,23%
2010	19.434.485	-0,26%
2011	22.389.570	15,21%
2012	22.869.458	2,14%
2013	27.868.157	21,86%
2014	25.753.831	-7,59%
2015	26.578.284	3,20%
2016	**27.050.225**	1,78%

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

GRAPH (19) 2006-2016 Cabotage Transportation Change (%)



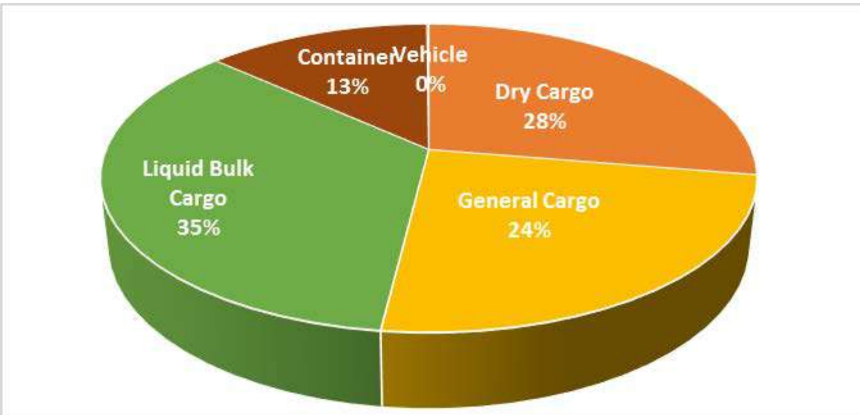
The total cabotage transportation in 2016 is 27.050.225 tons, the cabotage transportation increased about 87,7 % between the years 2006-2016.

TABLE (26) 2016 –Cabotage Transportation by the Types of Cargoes

Cargo Types	Cabotage Loading	Cabotage Unloading	Total	%
Dry Cargo	6.789.932	7.938.892	14.728.824	27,63%
General Cargo	6.416.335	6.539.938	12.956.273	24,31%
Liquid Bulk Cargo	9.470.710	9.052.284	18.522.994	34,75%
Container	3.542.863	3.490.132	7.032.995	13,20%
Vehicle	30.151	28.979	59.130	0,11%
Total	**26.249.991**	**27.050.225**	**53.300.216**	**100,00%**

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

GRAPH (20) 2016 Cabotage Transportation (Loading-Unloading) by the Types of Cargoes



The most significant increase in cabotage transportation is seen in 2013 by 21,8 %, the increase in 2011 by 15,21 and 2007 by 18,9 % respectively.

Table Shows the cabotage transportation by types of cargoes. The first three cargoes are liquid bulk cargo (35 %), dry bulk cargo (24%) general cargo (28%) and container (13%).
In cabotage handling in 2016, Kocaeli Port (21,43%), Aliağa Port (10,64%) and İskenderun Port (7,81%) took the first three place.
In cabotage loading, Kocaeli Port (18,4%), Aliağa Ports (17,6%) and Iskenderun Port (12,7%) are on the first three places, while in cabotage unloading Kocaeli Port (24,3%), Ambarlı Port (9,78%) and Istanbul Port (8,7%) are on the top of the list.

TABLE (27) 2016 Cabotage Transportation in Ports

Port Authority	Cabotage Loading	Cabotage Unloading	Total	%
KOCAELİ	4.837.543	6.582.869	11.420.412	21,43%
ALİAĞA	4.612.705	1.056.137	5.668.842	10,64%
İSKENDERUN	3.330.433	834.898	4.165.331	7,81%
AMBARLI	1.138.735	2.646.733	3.785.468	7,10%
ÇANAKKALE	2.380.483	114.362	2.494.845	4,68%
İSTANBUL	76.558	2.365.106	2.441.664	4,58%
TEKİRDAĞ	625.673	1.738.718	2.364.391	4,44%
GEMLİK	1.050.925	1.284.628	2.335.553	4,38%
KARADENİZ EREĞLİ	617.660	1.708.381	2.326.041	4,36%
KARABİGA	1.211.063	794.560	2.005.623	3,76%
SAMSUN	996.499	799.977	1.796.476	3,37%
MERSİN	454.234	1.163.157	1.617.391	3,03%
ANTALYA	507.565	954.707	1.462.272	2,74%
TUZLA	233.220	1.045.326	1.278.546	2,40%
MARMARA A.	1.062.602	3.126	1.065.728	2,00%
BOTAŞ(CEYHAN)	869.420	175.340	1.044.760	1,96%
ÜNYE	677.060	258.903	935.963	1,76%
BANDIRMA	377.452	290.836	668.288	1,25%
TRABZON	145.754	499.754	645.508	1,21%
RİZE	0	589.033	589.033	1,11%
İZMİR	70.754	499.430	570.184	1,07%
YALOVA	0	540.350	540.350	1,01%
TİREBOLU	0	383.200	383.200	0,72%
ZONGULDAK	105.290	253.372	358.662	0,67%
HOPA	144.253	97.920	242.173	0,45%
İNEBOLU	225.782	6.600	232.382	0,44%
BARTIN	92.064	118.901	210.965	0,40%
TAŞUCU	190.100	0	190.100	0,36%
GÜLLÜK	165.442	4.850	170.292	0,32%
GÖCEK	0	73.625	73.625	0,14%
MUDANYA	23.370	26.475	49.845	0,09%
ÇEŞME	1	32.070	32.071	0,06%
AMASRA	25.600	0	25.600	0,05%
MARMARİS	0	25.060	25.060	0,05%
ERDEK	1.751	22.463	24.214	0,05%
SİLİVRİ	0	20.000	20.000	0,04%
FATSA	0	13.430	13.430	0,03%
GİRESUN	0	11.600	11.600	0,02%
DİKİLİ	0	10.278	10.278	0,02%
VAKFIKEBİR	0	2.650	2.650	0,00%
BOZCAADA	0	700	700	0,00%
KUŞADASI	0	700	700	0,00%
TOTAL	**26.249.991**	**27.050.225**	**53.300.216**	**100,00%**

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

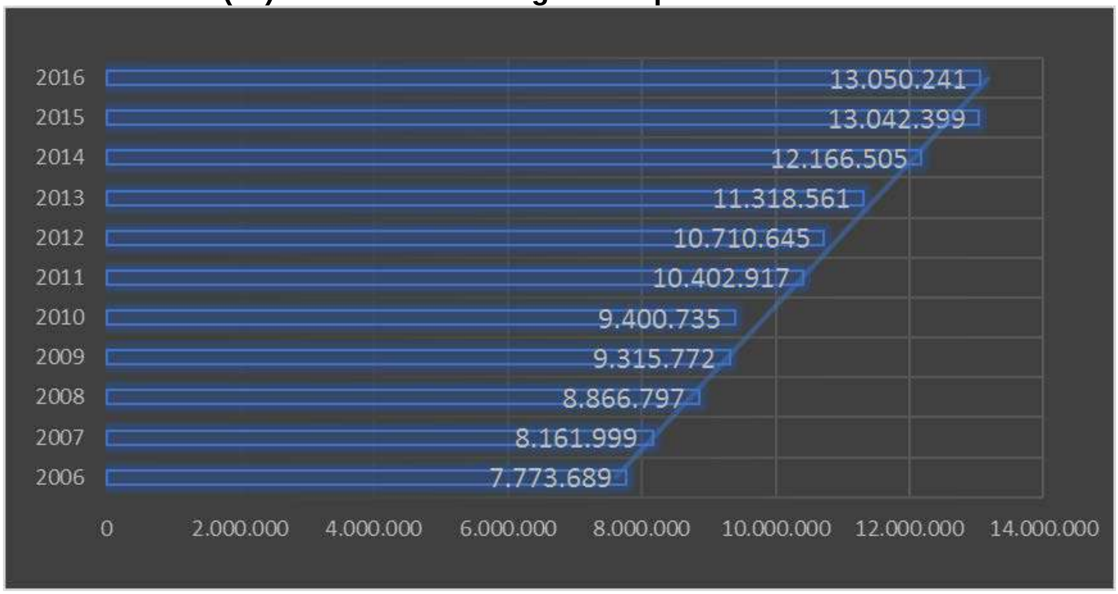
TABLE (28) 2006-2016 Cabotage Transportation Vehicle Number

Years	Vehicle Number	Annual Change %	Vehicle Number x Mile	Annual Change %2
2006	7.773.689	11,70%	51.978.669	22,90%
2007	8.161.999	5,00%	59.942.527	13,29%
2008	8.866.797	8,64%	82.950.808	27,74%
2009	9.315.772	5,06%	82.580.396	-0,45%
2010	9.400.735	0,91%	83.607.444	1,23%
2011	10.402.917	10,66%	83.283.519	-0,39%
2012	10.710.645	2,96%	77.785.568	-7,07%
2013	11.318.561	5,68%	85.096.902	8,59%
2014	12.166.505	7,49%	89.322.962	4,73%
2015	13.042.399	7,20%	95.505.115	6,47%
2016	13.050.241	0,06%	92.267.227	-3,39%

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

In table …., the changes in transportation of vehicles in cabotage between the years 2006 and 2016 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 68 % in total between 2006 and 2016.

GRAPH (21) 2006-2016 Cabotage Transportation Vehicle Number



The Table about the numbers of passengers carried in cabotage transportation shows that the biggest increase was in 2007 with 10.7 % and then, in 2013 the increase became 3,4 %. In the years 2006-2016 an increase of 9,4 % in passengers' number was realized.

TABLE (29) 2006-2016 Cabotage Transportation Passenger Number

Year	Passerger Number	Change %	Vehicle Number x Mile	Change %2
2006	135.348.554	10,30%	752.889.731	12,20%
2007	149.824.929	10,70%	842.975.355	10,69%
2008	151.645.639	1,22%	847.917.253	0,58%
2009	159.194.370	4,98%	886.609.389	4,36%
2010	154.198.088	-3,14%	847.715.977	-4,59%
2011	156.842.003	1,71%	854.909.150	0,84%
2012	159.076.921	1,42%	787.572.051	-8,55%
2013	164.426.997	3,36%	900.226.869	12,51%
2014	161.048.004	-2,06%	974.923.011	7,66%
2015	163.723.544	1,66%	992.592.392	1,78%
2016	148.101.589	-9,54%	1.112.255.126	10,76%

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

GRAPH (22) 2006-2016 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 harbors of Turkey, besides export and import goods.

TABLE (30) Development of the Seaborne Trade (2006-2016) Tons

Years	Seaborne Trade Total	Export	Import	Turkish Flag	TF %	FF %
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
2013	277.335.605	89.553.990	187.781.615	34.610.534	12	88
2014	283.316.220	88.544.792	194.771.428	33.624.322	12	88
2015	300.478.930	92.152.622	208.326.308	36.479.586	12	88
2016	**309.937.639**	**94.805.120**	**215.132.519**	**38.623.279**	**12**	**88**

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

In 2016 export shipments increased to 94,1 million tons, import shipments increased to 215,1 million tons when compared with the previous year. The share of Turkish flag vessels transporting foreign trade cargoes have been realized as 12 % on the average.

As a whole, the share of the Turkish flag vessels transporting foreign trade cargoes between 2006-2016 have been realized as 14.41 % on the average.

GRAPH (23) Development of the Seaborne Trade (Tons)

The transportation of foreign trade cargoes; 11 % of the import transportation totaling 215,1 million tons have been carried by Turkish flag vessels. 16 % of the export transportation totaling 94,8 million tons have been carried by Turkish flag vessels.

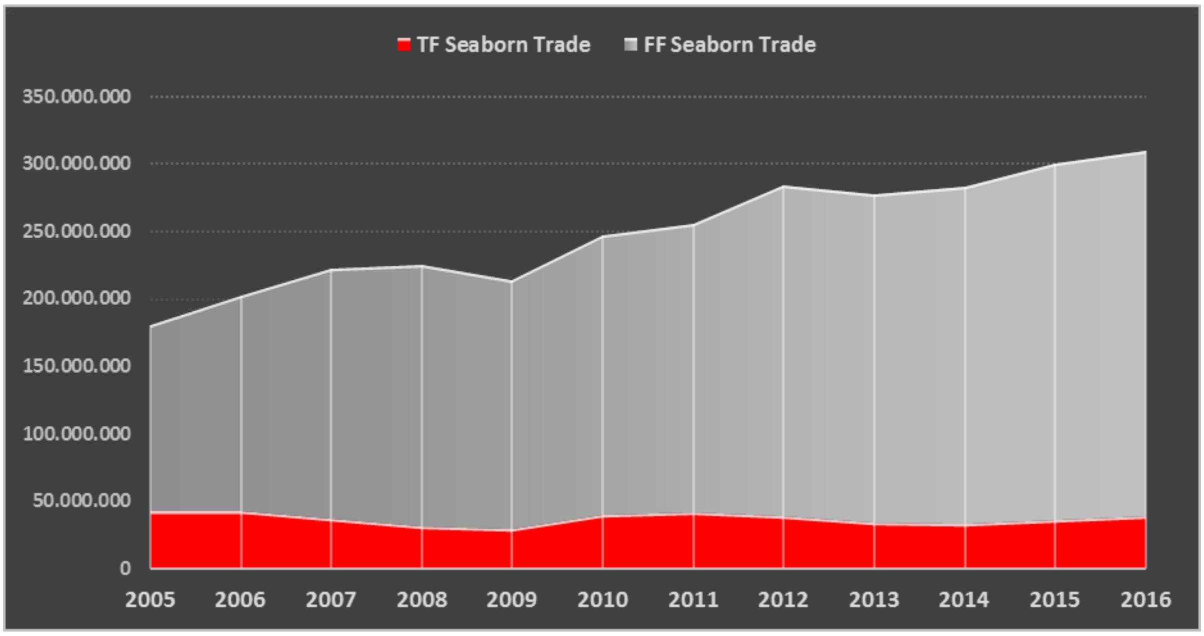
TABLE (31) Foreign Trade Transportation by Flags

Year	Turkish Flag(mton)				Foreign Flag (mton)				Total (mton)	
	TF Import	%	TF Export	%	FF Import	%	FF Export	%	TF Seaborn	FF Seaborn Trade
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
2013	22.949.887	12	11.660.647	13	164.831.728	88	77.893.343	87	34.610.534	242.725.071
2014	20.880.367	11	12.743.955	14	173.891.061	89	75.800.837	86	33.624.322	249.691.898
2015	22.724.776	11	13.754.810	15	185.601.532	89	78.397.812	85	36.479.586	263.999.344
2016	23.350.424	11	15.272.855	16	191.782.095	89	79.532.265	84	38.623.279	271.314.360
15-16 Change %									5,88%	2,77%

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

The transportation of seaborne foreign trade cargoes increased to 309 million tons when compared with 2016 (202 million tons). Import goods increased to 215 million tons, (139,4 million tons) export goods increased to 94,8 million tons (63,3 million tons) when compared with 2006 with the same period.

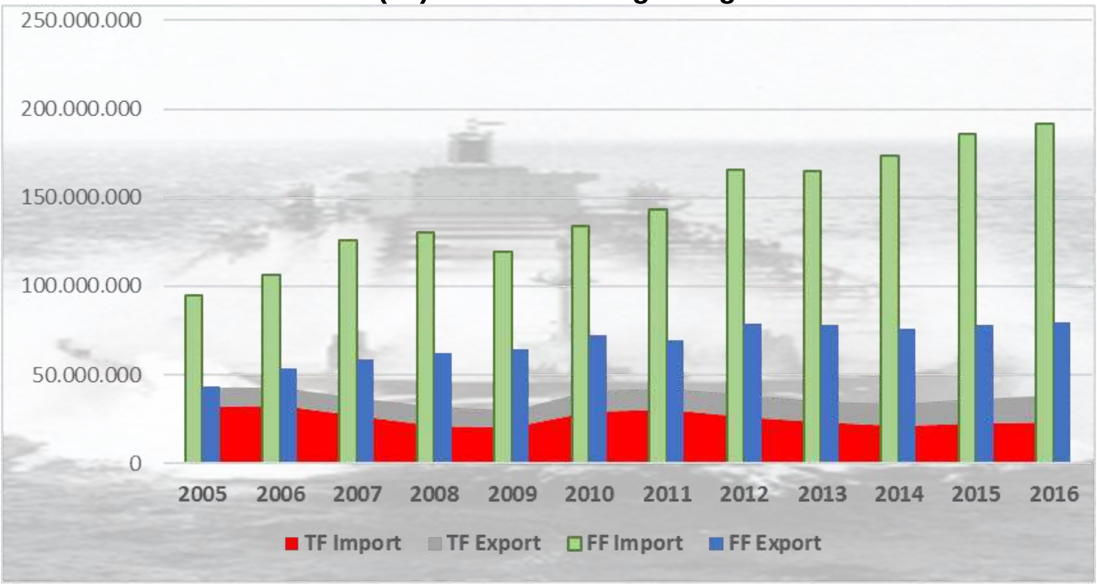
GRAPH (24) Turkish/Foreign Flag Shares (Tons)



The share of Turkish flag vessels, in total foreign trade transportation, in export basis increased to 15,3 million tons and in Import basis increased to 79,5 million tons in 2016, when compared with 9,8 and 32,8 million tons in 2006.

The share of foreign flag vessels, in total foreign trade transportation, in export basis increased to 79,5 million tons and in Import basis increased to 191,7 million tons in 2016, when compared with 53.5 and 106,6 million tons in 2006.

GRAPH (25) Turkish /Foreign Flag Shares



Development in Foreign Trade Transportation by Types of Cargoes

The major segments of the exports and transit loading goods in 2016, which realized totally as 156,2 million tons are % 43 Liquid Bulk cargo, 30 % Container, 12 % general cargo, 12 % dry bulk cargo and % 3 vehicle.

TABLE (32) By Types Cargo Handling Export And Transit Loading

Cargo Type	Loading (mton)					
	Export			Transit Loading	Total Loading	%
	Turkish Flag	Foreign Flag	Total			
Dry Bulk Cargo	3.695.011	14.487.609	18.182.620	80.642	18.263.262	11,69%
General Cargo	1.770.396	17.565.671	19.336.067	27.182	19.363.249	12,39%
Liquid Bulk Cargo	460.321	11.094.837	11.555.158	55.724.446	67.279.604	43,06%
Container	5.959.124	35.485.130	41.444.254	5.603.842	47.048.096	30,11%
Vehicle	3.388.003	899.018	4.287.021	67	4.287.088	2,74%
Total	**15.272.855**	**79.532.265**	**94.805.120**	**61.436.179**	**156.241.299**	**100,00%**

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

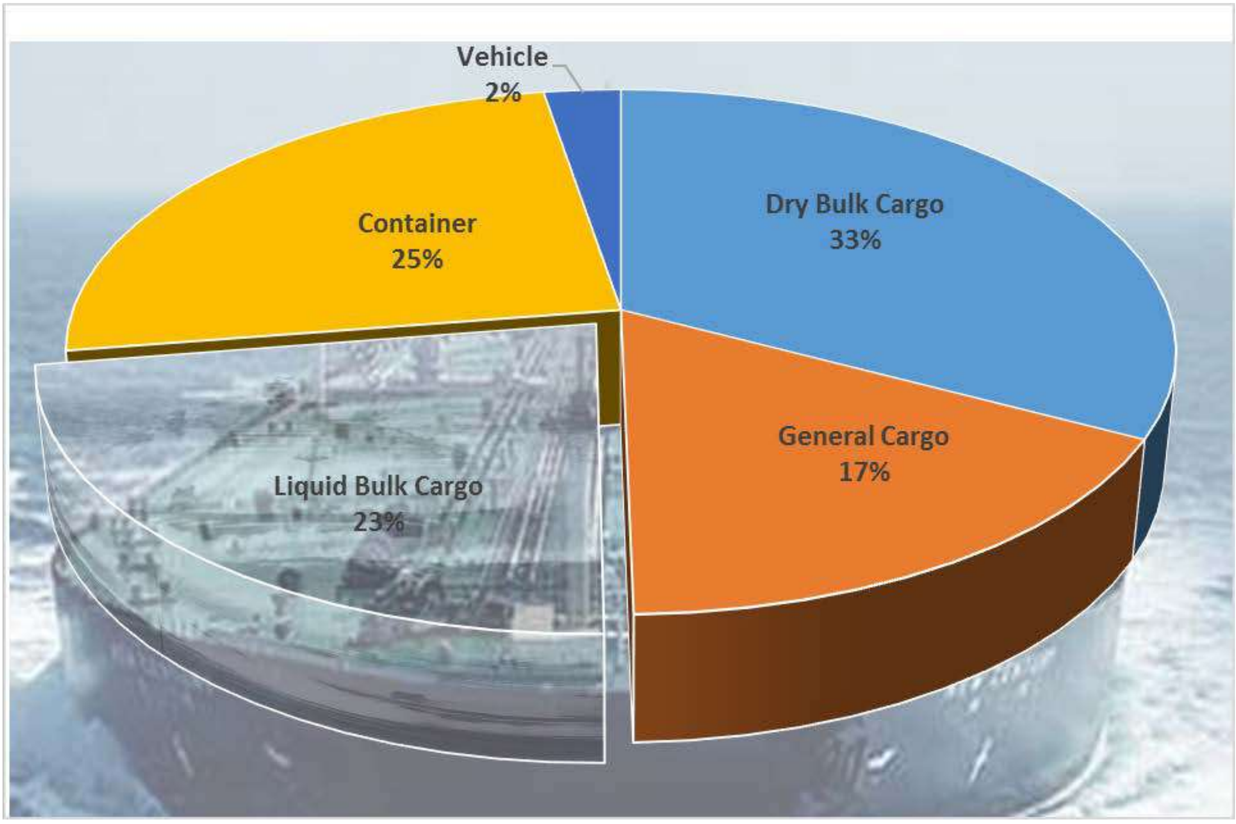
Major segments of the imported and transit unloading goods in 2016, which realized totally as 220 million tons are 38 % dry bulk cargo, 27 % Liquid bulk cargo, 18 % Container, % 15 General Cargo and % 2 vehicle.

TABLE (33) By Types Cargo Handling Import And Transit Unloading

Cargo Type	Unloading (mton)					
	Import			Transit Unloading	Total Unloading	%
	Turkish Flag	Foreign Flag	Total			
Dry Bulk Cargo	5.679.565	77.744.216	83.423.781	100.471	83.524.252	37,85%
General Cargo	3.611.788	29.453.553	33.065.341	179.756	33.245.097	15,07%
Liquid Bulk Cargo	6.512.034	52.701.743	59.213.777	7.992	59.221.769	26,84%
Container	4.269.620	31.338.977	35.608.597	5.238.909	40.847.506	18,51%
Vehicle	3.277.417	543.606	3.821.023	0	3.821.023	1,73%
Total	**23.350.424**	**191.782.095**	**215.132.519**	**5.527.128**	**220.659.647**	**100,00%**

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

GRAPH (26) Import and Export by the Types of Cargoes



The Progress in Seaborne Trade by Country Groups

In the year 2016, 42,4 million tons of export and 52,9 million tons of import, totally (loading-unloading) 95,3 million tons of transportation have been realized to the OECD countries.
Table and shows the export and import values to the OECD countries.

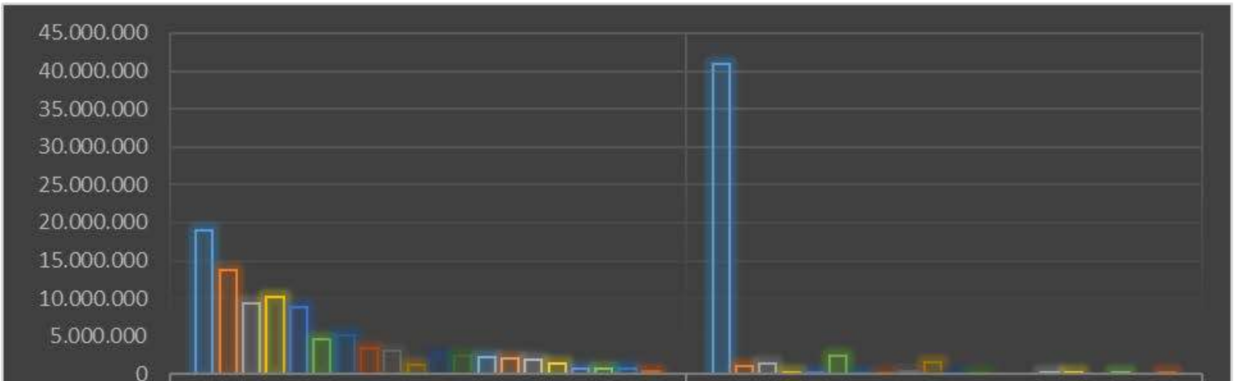
TABLE (34) Seaborne Trade to OECD Countries Tons (2016)

OECD Country	EXPORT				Transit Loading	Total
	Turksih Flag	OECD Country Flag	Foreign Flag	Total Export		
Italy	5.655.442	286.639	5.822.334	**11.764.415**	40.772.113	52.536.528
Spain	1.195.679	7.810	5.545.801	**6.749.290**	1.351.065	8.100.355
Greece	1.487.126	185.131	3.927.587	**5.599.844**	545.447	6.145.291
Isreal	1.581.498	0	3.347.015	**4.928.513**	205.947	5.134.460
Belgium	11.275	1.850	3.121.453	**3.134.578**	45.951	3.180.529
U.A.E.	0	0	3.011.422	**3.011.422**	432.537	3.443.959
France	727.312	0	1.353.941	**2.081.253**	2.437.270	4.518.523
Holland	19.875	317.846	1.114.032	**1.451.753**	209.798	1.661.551
Portugal	66.605	9.609	805.754	**881.968**	1.509.937	2.391.905
Germany	0	657	585.539	**586.196**	5.879	592.075
S.Korea	0	0	529.193	**529.193**	1.868	531.061
Sweden	0	0	368.128	**368.128**	0	368.128
Canada	0	0	335.237	**335.237**	288.024	623.261
Poland	0	0	233.563	**233.563**	0	233.563
Slovenia	52.654	0	113.212	**165.866**	1.566	167.432
Japan	0	0	111.745	**111.745**	0	111.745
Chile	0	0	107.590	**107.590**	0	107.590
Mexico	0	0	94.569	**94.569**	0	94.569
Denmark	0	0	80.671	**80.671**	0	80.671
Ireland	5.149	0	52.148	**57.297**	84.062	141.359
Finland	0	0	45.993	**45.993**	0	45.993
Iceland	0	0	42.852	**42.852**	0	42.852
Australia	0	0	33.680	**33.680**	0	33.680
Latvia	0	0	10.712	**10.712**	0	10.712
Norway	0	0	8.034	**8.034**	0	8.034
Estonia	0	0	6.980	**6.980**	0	6.980
New Zealand	0	0	375	**375**	0	375
Total	**10.802.615**	**809.542**	**30.809.560**	**42.421.717**	**47.891.464**	**90.313.181**

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 58,7 %, Spain 9 %, Greece 6,8 % shares.

GRAPH (27) Export-Import-Transit Seaborn Trade to OECD Countries (2016)



	Seaborn Trade	Total Transit
Italy	19.044.678	40.995.943
Greece	13.764.533	1.121.026
Sslovenia	9.410.379	1.442.586
Israel	10.229.077	235.275
Belgium	8.849.167	128.572
France	4.647.051	2.480.805
Holland	5.135.111	241.813
Canada	3.407.939	290.489
U.A.E	3.168.901	441.641
Portugal	1.222.739	1.539.032
S.Korea	2.618.959	125.361
Australia	2.422.909	1.308
Norwey	2.313.422	0
LATVIA	2.000.129	0
GERMANY	1.874.646	13.315
FINLAND	1.421.860	15
DENMARK	716.160	0
SWEDEN	694.458	691
POLAND	650.543	0
JAPAN	449.917	185.637

Among OECD countries, the first three that Turkey imports from / that conducts transit unloading in Turkey are Greece (16,1%), Italy (13,8%) and Belgium (10,6%).

In the year of 2016, the seaborne trade volume between Turkey and the OECD countries was 144,7 million metric tons. 95,4 million metric tons of this amount was import –export while 49,3 million metric tons was transit cargoes.

The seaborne trade share of the Turkish flag vessels was 12,6 % and foreign flag vessels' was 87,4%.

TABLE (35) Seaborne Trade to OECD Countries Tons (2016)

OECD Country	IMPORT				Transit Unloading	Total
	Turksih Flag	OECD Country Flag	Foreign Flag	Import Export		
Greece	2.258.256	190.387	5.716.046	**8.164.689**	575.579	8.740.268
Belgium	179.427	0	5.535.162	**5.714.589**	82.621	5.797.210
Israel	358.083	0	4.942.481	**5.300.564**	29.328	5.329.892
Italy	3.405.959	410.216	3.464.088	**7.280.263**	223.830	7.504.093
Holland	231.273	77.317	3.374.768	**3.683.358**	32.015	3.715.373
Canada	52.500	0	3.020.202	**3.072.702**	2.465	3.075.167
Spain	185.394	19.906	2.455.789	**2.661.089**	91.521	2.752.610
Australia	137.500	0	2.251.729	**2.389.229**	1.308	2.390.537
Norwey	0	194.509	2.110.879	**2.305.388**	0	2.305.388
S.Korea	37.943	0	2.051.823	**2.089.766**	123.493	2.213.259
Latvia	78.663	0	1.910.754	**1.989.417**	0	1.989.417
France	918.552	0	1.647.246	**2.565.798**	43.535	2.609.333
Finland	0	0	1.375.867	**1.375.867**	15	1.375.882
Germany	40.287	3.896	1.244.267	**1.288.450**	7.436	1.295.886
Denmark	1.052	0	634.437	**635.489**	0	635.489
Poland	5.499	0	411.481	**416.980**	0	416.980
Estonia	8.030	0	399.075	**407.105**	1.665	408.770
Mexico	0	0	395.853	**395.853**	0	395.853
Sweden	0	0	326.330	**326.330**	691	327.021
Portugal	60.304	348	280.119	**340.771**	29.095	369.866
Japan	90.097	0	248.075	**338.172**	185.637	523.809
U.A.E.	0	0	157.479	**157.479**	9.104	166.583
Slovenia	11.602	0	57.252	**68.854**	583	69.437
Chile	0	0	8.286	**8.286**	60	8.346
İreland	0	0	7.681	**7.681**	50	7.731
New Zealand	0	0	44	**44**	0	44
Iceland	0	0	0	**0**	0	0
Total	**8.060.421**	**896.579**	**44.027.213**	**52.984.213**	**1.440.031**	**54.424.244**

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

In the year 2016, 41,8 million tons of export and 50,8 million tons of import, totally 92,6 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 58,08 %, Spain with 8,96 %, Greece with 6,79 % shares.

TABLE (36) Seaborne Trade(Export) to EU Countries (mton) (2016)

EU Countries	EXPORT				TRANSIT LOADING	TOTAL LOADING
	Tukish Flag	EU Country Flag	Foreign Flag	Total Flag		
Italy	5.655.442	286.639	5.822.334	**11.764.415**	40.772.113	52.536.528
Spain	1.195.679	7.810	5.545.801	**6.749.290**	1.351.065	8.100.355
Greece	1.487.126	185.131	3.927.587	**5.599.844**	545.447	6.145.291
Belgium	11.275	1.850	3.121.453	**3.134.578**	45.951	3.180.529
U.K.	49.766	79.650	2.844.993	**2.974.409**	518.960	3.493.369
Malta	9.500	664.525	1.863.820	**2.537.845**	109.350	2.647.195
Romania	527.178	0	1.586.591	**2.113.769**	442.215	2.555.984
France	727.312	0	1.353.941	**2.081.253**	2.437.270	4.518.523
Holland	19.875	317.846	1.114.032	**1.451.753**	209.798	1.661.551
Bulgaria	313.177	10.717	568.179	**892.073**	421.186	1.313.259
Portugal	66.605	9.609	805.754	**881.968**	1.509.937	2.391.905
Germany	0	657	585.539	**586.196**	5.879	592.075
Sweden	0	0	368.128	**368.128**	0	368.128
Polland	0	0	233.563	**233.563**	0	233.563
Slovenia	52.654	0	113.212	**165.866**	1.566	167.432
Denmark	0	0	80.671	**80.671**	0	80.671
Crotia	8.800	0	70.026	**78.826**	182.000	260.826
Ireland	5.149	0	52.148	**57.297**	84.062	141.359
Finland	0	0	45.993	**45.993**	0	45.993
Letonya	0	0	10.712	**10.712**	0	10.712
Estonia	0	0	6.980	**6.980**	0	6.980
Latvia	0	0	0	**0**	0	0
Total	**10.129.538**	**1.564.434**	**30.121.457**	**41.815.429**	**48.636.799**	**90.452.228**

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

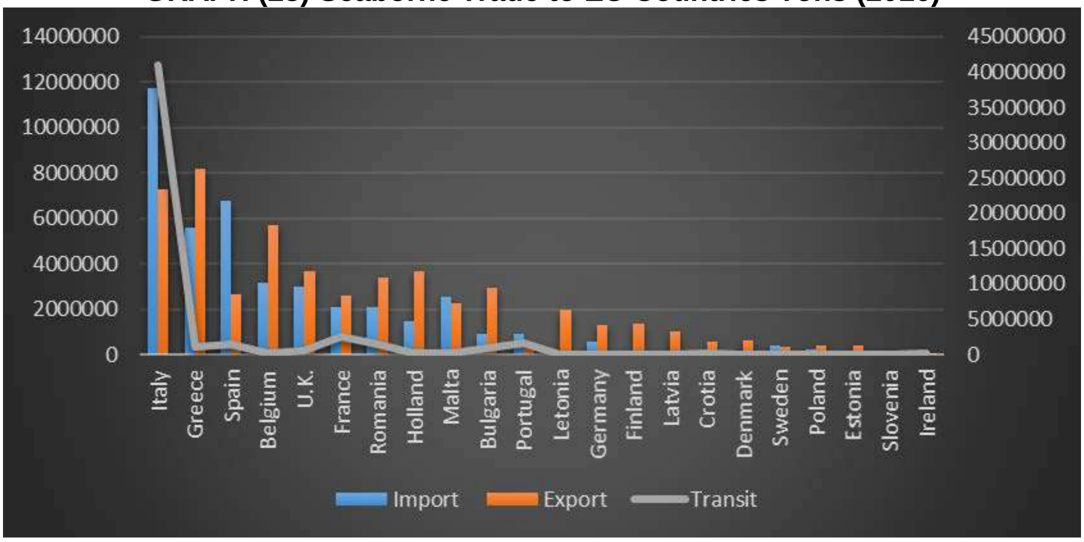
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among EU countries are Greece with 16.3 %, Italy 14,03 % and Belgium 10,86 % shares.

TABLE (37) Seaborne Trade to EU Countries (mTon) (2016)

EU Countries	IMPORT				TRANSİT UNLOADING	TOTAL UNLOADING
	Turkish Flag	UE Country Flag	Foreign Flag	**Total Flag**		
Greece	2.258.256	190.387	5.716.046	**8.164.689**	575.579	8.740.268
Italy	3.405.959	410.216	3.464.088	**7.280.263**	223.830	7.504.093
Belgium	179.427	0	5.535.162	**5.714.589**	82.621	5.797.210
Holland	231.273	77.317	3.374.768	**3.683.358**	32.015	3.715.373
U.K.	239.539	39.150	3.400.640	**3.679.329**	15.893	3.695.222
Romania	1.076.180	0	2.321.779	**3.397.959**	1.056.511	4.454.470
Bulgaria	778.956	76.638	2.051.816	**2.907.410**	428.417	3.335.827
Spain	185.394	19.906	2.455.789	**2.661.089**	91.521	2.752.610
France	918.552	0	1.647.246	**2.565.798**	43.535	2.609.333
Malta	3.835	137.028	2.132.245	**2.273.108**	21.624	2.294.732
Letonya	78.663	0	1.910.754	**1.989.417**	0	1.989.417
Finland	0	0	1.375.867	**1.375.867**	15	1.375.882
Germany	40.287	3.896	1.244.267	**1.288.450**	7.436	1.295.886
Latvia	64.029	0	932.186	**996.215**	0	996.215
Denmark	1.052	0	634.437	**635.489**	0	635.489
Crotia	150.444	0	439.380	**589.824**	1.166	590.990
Poland	5.499	0	411.481	**416.980**	0	416.980
Estonia	8.030	0	399.075	**407.105**	1.665	408.770
Portugal	60.304	348	280.119	**340.771**	29.095	369.866
Sweden	0	0	326.330	**326.330**	691	327.021
Slovenia	11.602	0	57.252	**68.854**	583	69.437
Ireland	0	0	7.681	**7.681**	50	7.731
Total	**9.697.281**	**954.886**	**40.118.408**	**50.770.575**	**2.612.247**	**53.382.822**

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

GRAPH (28) Seaborne Trade to EU Countries Tons (2016)



In the year 2016, 12,8 million tons of export and 66,3 million tons of import, totally 79,1 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 Greece with 38,82 %, Romania with 16,15 %, Russian with 14,20 % shares.

TABLE (38) Seaborne Trade to BSEC Countries (Tons) 2016

BSEC Countries	EXPORT				Transit Loading	Total Loading
	Turkish Flag	BSEC Country Flag	Foreign Flag	**Total**		
Greece	1.487.126	185.131	3.927.587	**5.599.844**	545.447	6.145.291
Romania	527.178	0	1.586.591	**2.113.769**	442.215	2.555.984
Russian	181.657	222.708	1.529.224	**1.933.589**	313.536	2.247.125
Ukraine	144.361	62.619	1.072.108	**1.279.088**	364.040	1.643.128
Bulgaria	313.177	10.717	568.179	**892.073**	421.186	1.313.259
Georgia	536.124	0	192.537	**728.661**	920.434	1.649.095
Albania	15.891	5.202	244.182	**265.275**	0	265.275
Moldova	1.500	3.000	3.250	**7.750**	15	7.765
Azerbaijan	0	0	1.630	**1.630**	295	1.925
Total	**3.207.014**	**489.377**	**9.125.288**	**12.821.679**	**3.007.168**	**15.828.847**

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

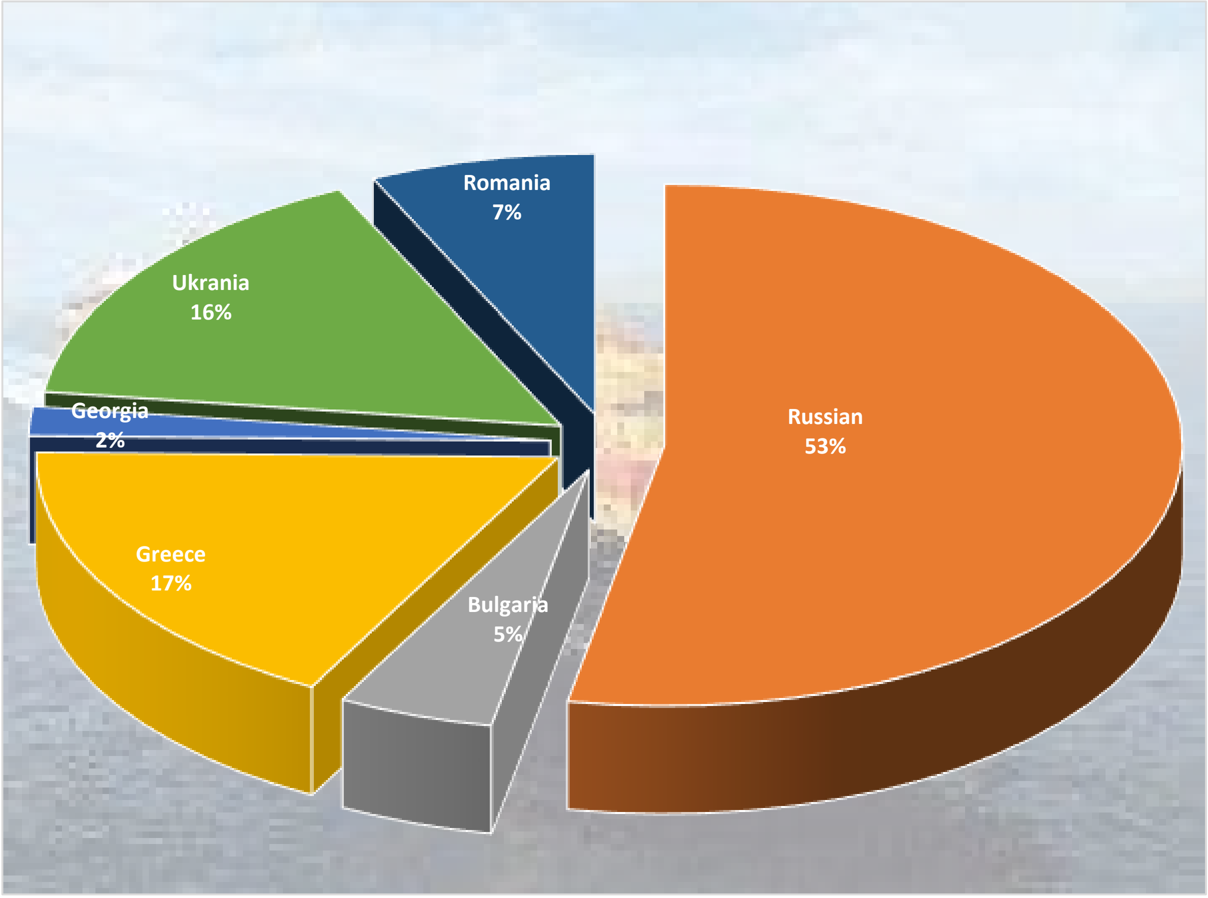
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among BSEC countries are Russia with 57,71 %, Ukraine with 17,09 % and Greece with 12,53 % shares.

TABLE (39) Seaborne Trade to BSEC Countries (Tons)

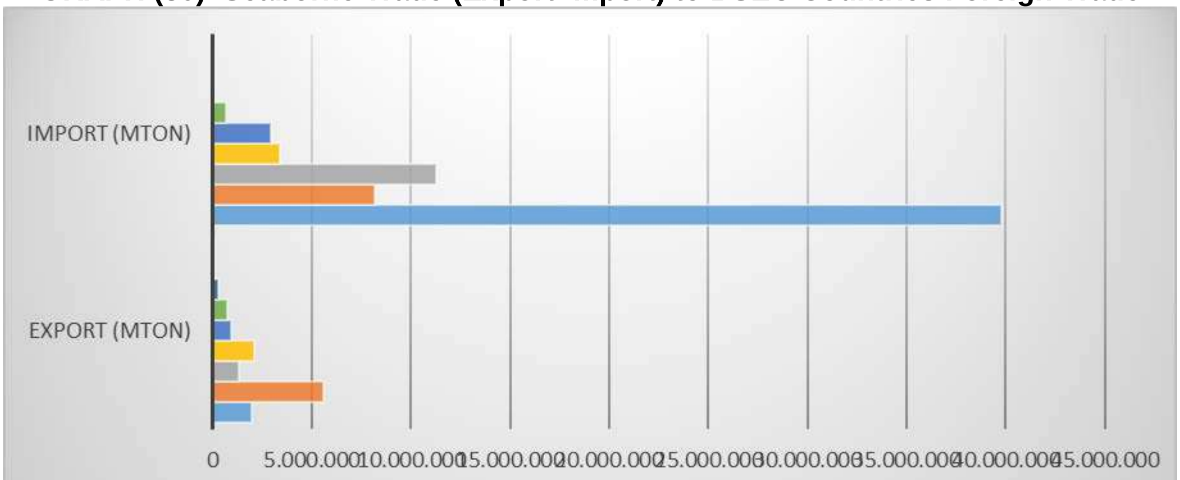
BSEC Countries	IMPORT				Transit Unloading	Total Unloading
	Turkish Flag	BSEC Country Flag	Foreign Flag	**Total**		
Russian	3.228.808	3.870.262	32.684.334	**39.783.404**	463.992	40.247.396
Ukrania	2.706.969	577.875	7.962.376	**11.247.220**	675.457	11.922.677
Greece	2.258.256	190.387	5.716.046	**8.164.689**	575.579	8.740.268
Romania	1.076.180	0	2.321.779	**3.397.959**	1.056.511	4.454.470
Bulgaria	778.956	76.638	2.051.816	**2.907.410**	428.417	3.335.827
Georgia	443.105	0	244.148	**687.253**	232.316	919.569
Moldova	4.503	6.667	57.381	**68.551**	4	68.555
Albania	9.383	0	28.542	**37.925**	0	37.925
Azerbaijan	0	0	17.199	**17.199**	0	17.199
Total	**10.506.160**	**4.721.829**	**51.083.621**	**66.311.610**	**3.432.276**	**69.743.886**

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

GRAPH (29) Seaborne Trade to BSEC Countries Foreign Trade



GRAPH (30) Seaborne Trade (Export-Import) to BSEC Countries Foreign Trade



	Export (mton)	Import (mton)
Azerbaijan	1.630	17.199
Moldova	7.750	68.551
Albania	265.275	37.925
Georgia	728.661	687.253
Bulgaria	892.073	2.907.410
Romania	2.113.769	3.397.959
Ukrania	1.279.088	11.247.220
Greece	5.599.844	8.164.689
Russian	1.933.589	39.783.404

World Container Fleet by Country of Domicile

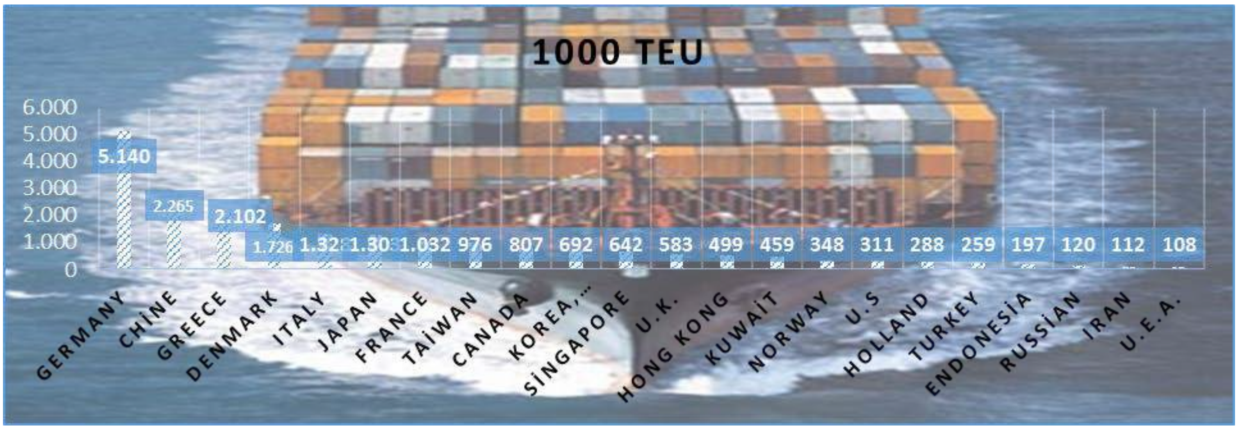
The “country of domicile” examination (including container ships of 1.000 GRT and over) shows that at the beginning of 2016, 22.317.000 TEU of the container capacity was not registered in the country of domicile of the owner, but flagged out.

TABLE (40) World Full Container Fleet by Country of Domicile (1000 grt and over) 2016						
Rank (1000 TEU)	Flag dwt rank of the World	Country	No	1000 DWT	1000 TEU	% share of total
1	4	Germany	1.351	58.635	5.140	23,03%
2	3	Chine	446	23.177	2.265	10,15%
3	1	Greece	460	25.083	2.102	9,42%
4	12	Denmark	272	20.836	1.726	7,73%
5	10	Italy	204	15.232	1.328	5,95%
6	2	Japan	258	14.169	1.303	5,84%
7	21	France	141	12.234	1.032	4,62%
8	9	Taiwan	246	12.048	976	4,37%
9	13	Canada	101	8.993	807	3,62%
10	5	Korea, Rep.of	211	8.361	692	3,10%
11	8	Singapore	213	7.757	642	2,88%
12	14	U.K.	114	6.524	583	2,61%
13	11	Hong Kong	94	5.637	499	2,24%
14	26	Kuwait	42	5.032	459	2,06%
15	6	Norway	48	2.200	348	1,56%
16	7	U.S	93	3.517	311	1,39%
17	25	Holland	91	1.189	288	1,29%
18	15	Turkey	88	1.946	259	1,16%
19	20	Endonesia	195	2.139	197	0,88%
20	17	Russian	24	316	120	0,54%
21	19	Iran	28	1.210	112	0,50%
22	23	U.E.A.	56	1.277	108	0,48%
23	18	Belgium	25	1.089	91	0,41%
24	30	Vietnam	41	412	39	0,17%
25	16	India	13	313	37	0,17%
26	24	Malaysia	24	263	23	0,10%
27	28	Switzerland	5	69	20	0,09%
28	22	Saudi Arabia	1	5	9	0,04%
29	27	Qatar	6	68	7	0,03%
30	29	Bermuda	0	0	0	0,00%
Total			4.891	239.731	21.523	96,44%
Other Countries			242	5.799	794	3,56%
World Total			5.133	245.530	22.317	100,00%

Source : ISL January-February 2017

As regards the owner countries, German ship owners controlled by far the largest part of the world container fleet, namely 5,1 mill. TEU (1.351 container vessels) followed by Chne 2.3 mill TEU (446 container vessels) and Greece 2,1 mill TEU (460 container vessels).

GRAPH (31) World Full Container Fleet by Country of Domicile (*1000 GT and over*) 2016



Container handling in Turkey in the years 2006 and 2016 are shown in Table …. below on the basis of public and private sectors.

When the container transportations in 2016 is examined as cabotage, exports, imports and transit cargoes; on the basis of TEU, exports became 3.5 million TEU, imports 3.6 million TEU, cabotage loading-unloading 738.312 TEU and transit 872.772 TEU.

Transportation volume of Turkey's container transports by sea way was 3.9 million TEU in 2006; in 2016 it became 8 million TEU, at the same period imports cargoes increased to 3.6 million TEU from 1.8 million TEU and the exports cargoes increased to 3.5 million TEU when compared with 1.8 million TEU in 2006.

TABLE (41) Container Handling 2006-2016 (TEU)

Year	LOADING (TEU)			UNLOADING (TEU)			SEA BORN TRADE (TEU)			
	Cabotage	Export	Total	Cabotage	Import	Total	Export +Import	Transit Loading - Unloading	Sea Born Trade	Change
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	14,60%
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	70,20%
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	13,90%
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	**-15,20%**
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%
2013	274.589	3.165.653	3.440.242	269.908	3.199.969	3.469.877	6.365.622	989.815	7.355.437	9,50%
2014	266.997	3.488.008	3.755.005	260.067	3.581.811	3.841.878	7.069.819	754.238	7.824.057	6,40%
2015	305.882	3.394.508	3.700.390	300.182	3.454.345	3.754.527	6.848.854	691.481	7.540.335	**-3,63%**
2016	365.517	3.543.804	3.909.321	372.795	3.607.086	3.979.881	7.150.890	872.772	8.023.662	**6,41%**
2016 Container Handling 8.761.974 TEU										

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

Graph (32) Container Handling 2006-2016 (TEU)

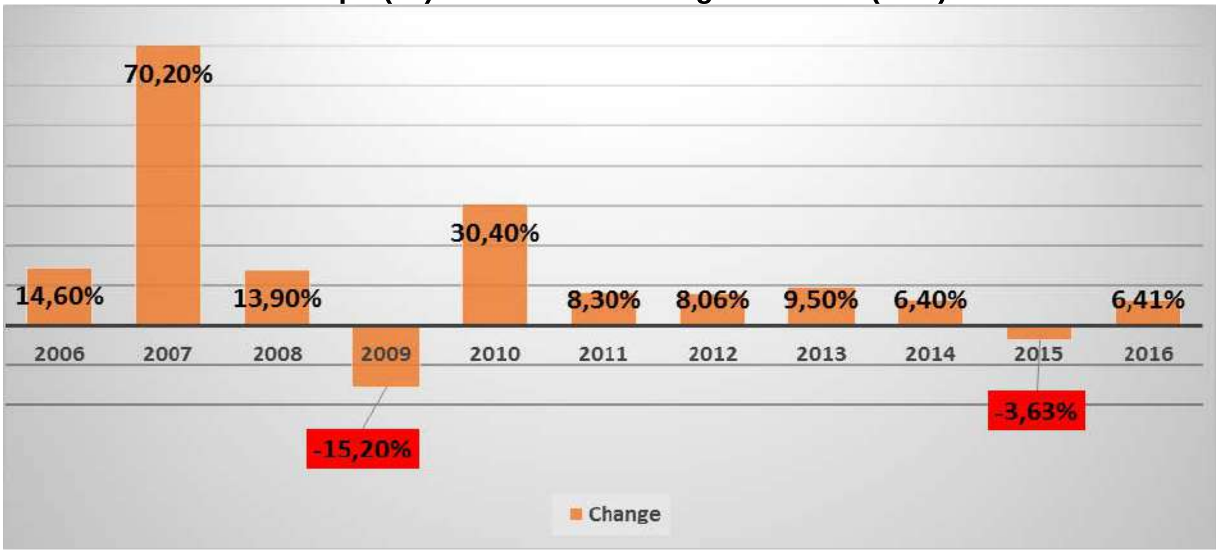


TABLE (42) Position at the 20 Country Container Foreign Trade Handling (TEU) 2016

Country	Export TEU	Import TEU	Seaborn Trade	Transit TEU	Total TEU
Egypt	465.831	741.438	1.207.269	51.134	1.258.403
Greece	416.534	529.035	945.568	88.776	1.034.345
Italy	340.796	240.705	581.501	41.584	623.085
Chine	227.049	212.115	439.163	76.531	515.694
Belgium	192.284	201.520	393.804	10.332	404.136
Israel	172.633	204.083	376.716	10.604	387.320
Spain	289.231	64.088	353.319	11.244	364.563
Malta	116.395	202.123	318.518	3.253	321.771
Lebanon	58.885	231.727	290.612	13.918	304.529
U.K.	195.894	52.752	248.646	5.993	254.639
Sibgapore	68.836	160.947	229.782	11.618	241.400
Romania	122.373	89.022	211.395	131.912	343.307
Russia	87.259	109.061	196.320	44.414	240.734
Korea Re.of	52.489	73.177	125.666	10.474	136.140
Georgia	48.658	71.779	120.437	95.470	215.907
Saudi Arabia	58.120	54.093	112.213	1.413	113.626
U.E.A.	99.291	938	100.229	34.626	134.855
Libya	41.173	57.226	98.399	8.680	107.079
France	63.874	19.878	83.751	3.540	87.291
Algeria	28.226	50.231	78.458	6.692	85.149
Other	397.974	241.150	639.124	210.567	849.690
Total	**3.543.804**	**3.607.086**	**7.150.890**	**872.772**	**8.023.662**

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

As of 2016, the countries which Turkey performed foreign trade with / conducted transit container transportation are as follows: Egypt (15.6%), Greece (12,89%) and Italy (7,76%). The data of the foreign trade / transit container transportation of top 20 countries are shown in the Table ……

Vehicle Transportation through Ro-Ro Lines

Ro-Ro lines of Turkey in 2010-2016 are shown below.
Table 43 above shows the amounts of the transported full vehicles (export and import) in the years 2010-2016.

TABLE (43) Ro-Ro Lines Transported Vehicles (2010- 2016)

Region	Ro-Ro Lines	2010	2011	2012	2013	2014	2015	2016
Marmara	Pendik/Haydarpasa-Trieste	116,815	139.270	121.742	167.201	175.117	188.378	182.958
	Haydarpasa-İlyıcheysky	0	0	0	18.343	34.945	24.003	19.376
	Derince-Poti	0	0	0	646	1.571	1.482	98
	Ambarlı-Trieste	37,627	18.017	15.618	7.595	0	0	6298
	Ambarlı-Toulen		0	37.505	14.893	0	0	0
	Pendik/Haydarpasa-Marseille	7480	2.130	0	0	0	0	0
	Tekirdag-Toulon	9269	0	0	0	0	0	0
	Tekirdag-Trieste	0	0	0	1.466	1.067	0	0
	Tuzla-Toulen	0	0	0	0	43.305	56.061	61.740
	Regional Total	**171,191**	**159.417**	**174.865**	**210.144**	**256.005**	**269.924**	**270.470**
Mediterranean	Taşucu-Girne	36,071	36.316	34.168	34.153	34.497	29.640	29.944
	Taşucu-Tripoli	0	0	0	8.292	8.613	14.758	18.361
	Taşucu-Tartous	0	0	0	5.437	3.026	1.180	127
	Mersin-Magosa	19,107	18.275	14.669	18.901	22.138	20.760	22.811
	Mersin-Trieste	28,571	37.093	39.748	34.848	35.849	37.538	36.234
	İskenderun-Port Said	0	0	5.673	6.146	5.463	2.822	0
	İskenderun - Haifa	0	0	0	3.194	2.287	109	0
	Mersin-Damıetta	0	0	0	7.071	0	0	0
	Mersin-İskenderiye	0	253	790	638	1.607	113	6
	Regional Total	**84,638**	**91.937**	**95.048**	**118.680**	**113.480**	**106.920**	**107.483**
Aegean	Çeşme-Trieste	27,179	43.058	44.106	45.764	47.797	50.825	54.954
	İzmir-Dedeağaç	0	0	0	0	0	0	0
	Regional Total	**27,179**	**43.058**	**44.106**	**45.764**	**47.797**	**50.825**	**54.954**
Blacksea	Zonguldak-Yevpatoria	19,573	23.540	25.126	27.007	5.378	159	0
	Zonguldak Sevastopol	0	0	0	4.477	2.246	250	5
	Zonguldak-Skodovsk	0	0	0	8.001	438	0	174
	Zonguldak-Ilyichevsky	0	0	0	2	11.110	12.237	8.965
	Samsun-Novorossisky	15,145	10.742	7.670	14.682	16.491	10.297	3.447
	Samsun-Kavkaz	0	1.383	1.236	895	662	441	150
	Samsun - Tuapse	0	0	0	2.964	4.687	4.382	116
	Samsun-Gelincik	0	0	0	3.634	6.821	13.853	5.908
	Trabzon-Sochi	5,078	637	518	228	440	2	0
	Regional Total	**39,796**	**36.302**	**34.550**	**61.890**	**48.273**	**41.621**	**18.765**
	Total	**322.804**	**330.714**	**348.569**	**436.478**	**465.555**	**469.290**	**451.672**

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

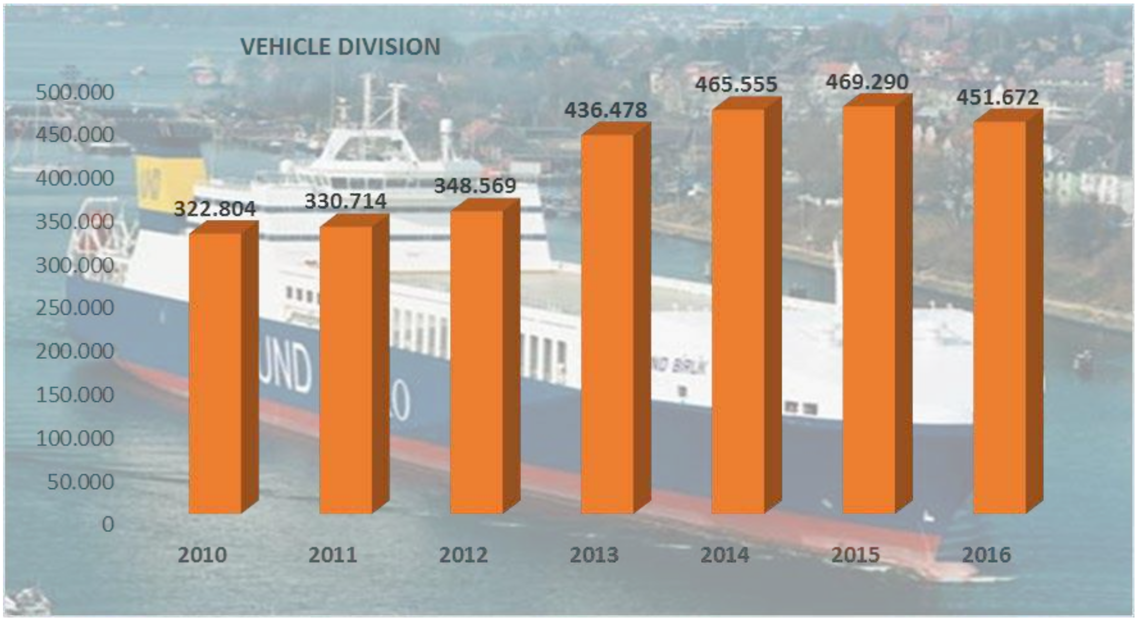
In The Black Sea region; 174 vehicles on Zonguldak-Skodovsk line, 3.447 vehicles on Samsun-Novorossiysk line, 5 vehicles on Zonguldak- Sevastopol line, 5.908 vehicles on Samsun Gelincik line, 116 vehicles on Samsun Tuapse line, 150 vehicles on Samsun-Kavkaz line and 8.965 vehicles on Zonguldak –Iıyichevsky line, totally regional 18.765 vehicles have been transported in 2016.

In The Marmara Sea region; 19.376 vehicles have been carried on Haydarpaşa-Iıyıcheysky line, 182.376 vehicles on Pendik/Haydarpaşa-Trieste line, 61.740 vehicles on Tuzla-Toulen line, 6.298 vehicles on Ambarlı-Trieste line and 98 vehicles on Derince-Poti line, totally regional 270.470 vehicles have been transported in 2016.

In The Aegean Sea region; 54.954 vehicles have been carried on Çesme-Trieste line, totally regional 54.954 vehicles have been transported in 2016.

In The Mediterranean region; 29.944 vehicles have been carried on Taşucu-Girne line, 22.811 vehicles have been carried on Mersin-Magosa line, 36.234 vehicles have been carried on Mersin-Trieste line, 18.361 vehicles have been on Taşucu-Tripoli line, 127 vehicles have been carried on Taşucu-Tartous line, 6 vehicles have been carried on Mersin-Iskenderiye line, totally regional 107.483 vehicles have been transported in 2016.

GRAPH (33) Ro-Ro Lines Transported Vehicles (2010- 2016)



The majority of the transported vehicles by Regions are, 60 % the Sea of Marmara Region, 4 % Black Sea Region, 24 % Mediterranean Region and 12 % The Aegean Sea Region in 2016.

GRAPH (34) RO-RO Lines Transported Vehicles (2016)

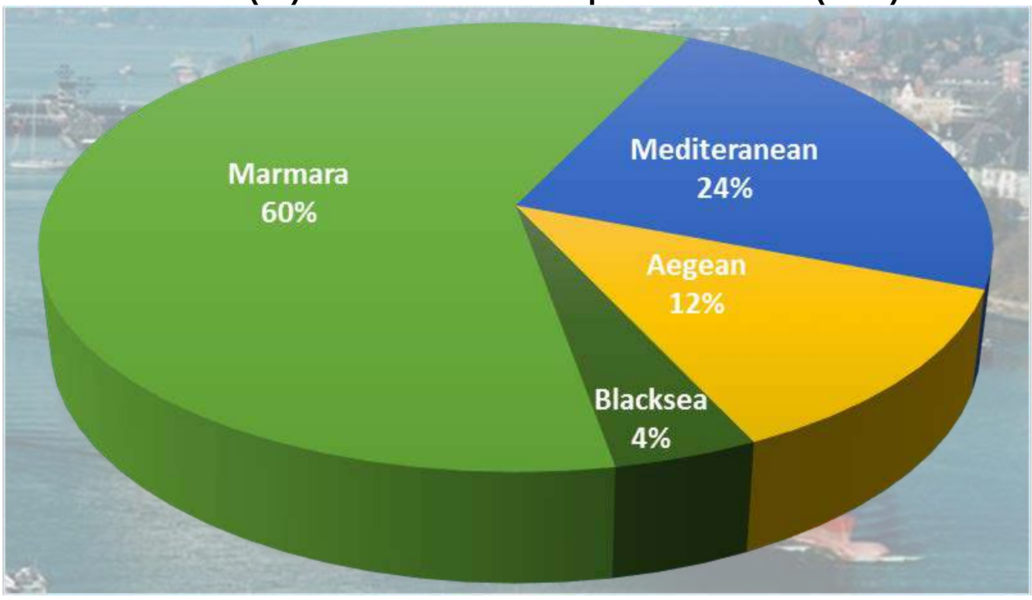


TABLE (44)2016 Aroad Ro-Ro ships on regular line with Carrying Vehicle Number

Ro-Ro Lines	The Number of Incoming Ships (Ro-Ro)	Total Passengers	Incoming Vehicle	Outgoing Vehicle	Total
PENDİK/HAYDARPAŞA - TRİESTE	501	5.232	94.579	88.379	182.958
AMBARLI-TRIESTE	117	1.078	881	5.417	6.298
ÇEŞME - TRİESTE	157	0	24.894	30.060	54.954
SAMSUN - NOVOROSSİYSK	48	95	1.574	1.873	3.447
ZONGULDAK - SKODOVSK	9	0	57	117	174
TAŞUCU - GİRNE	336	87.414	14.721	15.223	29.944
MERSİN - MAGUSA	406	23.186	11.419	11.392	22.811
MERSİN - TRİESTE	104	876	17.591	18.643	36.234
SAMSUN-KAVKAZ	4	0	60	90	150
SAMSUN-GELİNCİK	75	0	3.045	2.863	5.908
SAMSUN-TUAPSE	14	1	78	38	116
TAŞUCU-TRİPOLİ	256	20.080	8.904	9.457	18.361
HAYDARPAŞA-ILYICHEVSKY	132	0	9.684	9.692	19.376
ZONGULDAK-SEVASTOPOL	3	5	2	3	5
TAŞUCU-TARTOUS	9	62	49	78	127
ZONGULDAK-ILYICHEVSKY	76	9.016	4.958	4.007	8.965
DERİNCE-POTİ	5	0	0	98	98
TUZLA-TOULEN	156	3.043	31.044	30.696	61.740
TOTAL	**2.412**	**150.112**	**223.546**	**228.126**	**451.672**

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

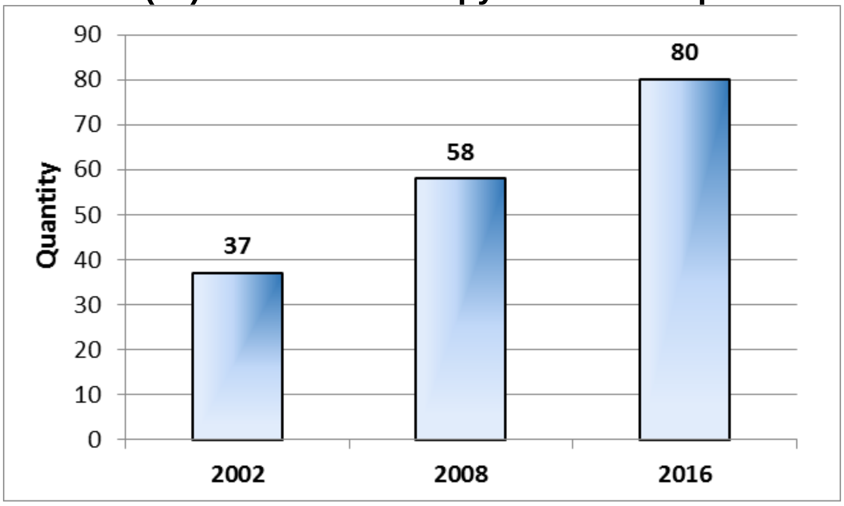
CHAPTER III

SHIPBUILDING INDUSTRY

General Outlook of Turkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, under operation raised up to 80 as of April 2017 while it was just only 37 in 2002. The quantity of shipyards under construction are 23 and 15 areas are defined as shipyard investment area as of 2016.

GRAPH (35): 2002 / 2016 Shipyards Under Operation



Source: Ministry of Transport, Maritime Affairs and Communications 04/2017

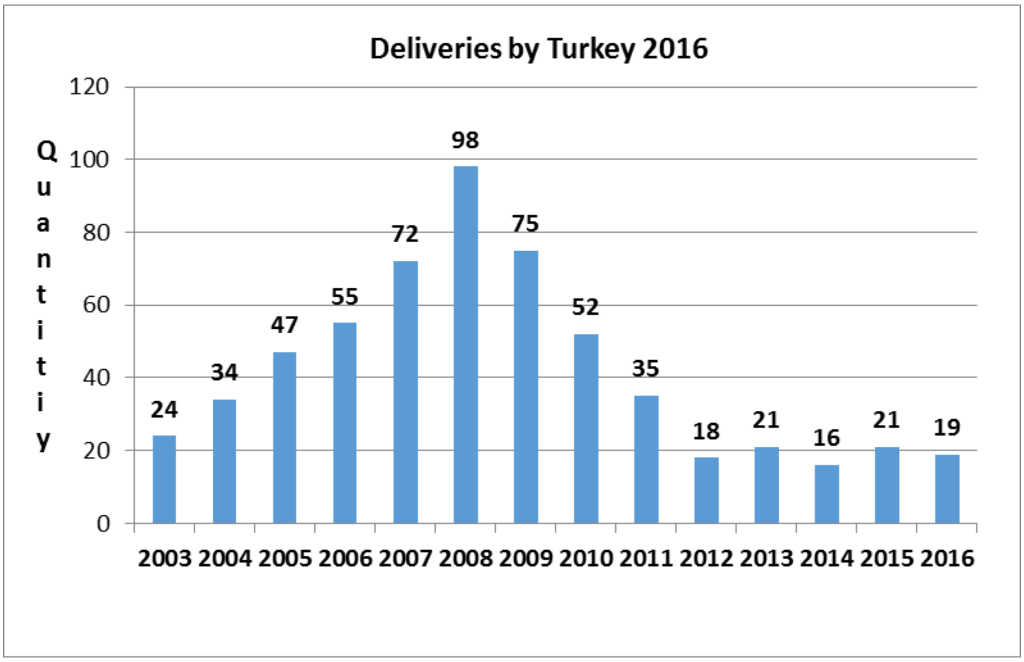
<u>Shipbuilding industry is a branch of heavy industry which provides;</u>

- 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.

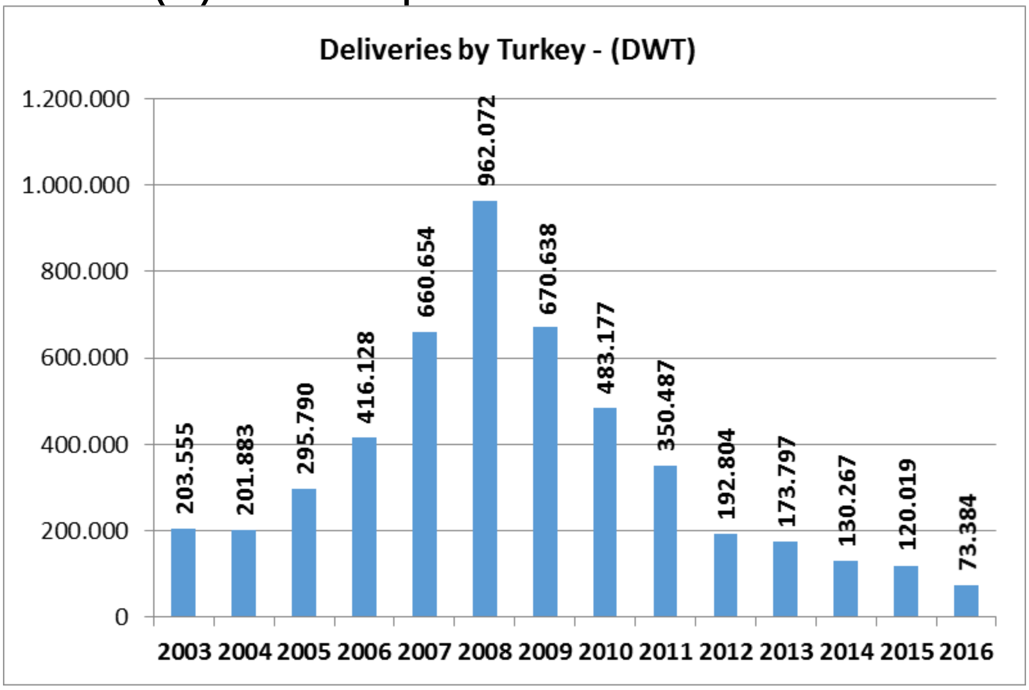
In 2016, 19 ships DWT of 73.384 tons had been delivered.

GRAPH(36): Number of Ships Delivered Between 2003-2016



Source: Clarkson Research Services 01/2017

GRAPH (37): DWT of Ships Delivered Between 2003-2016

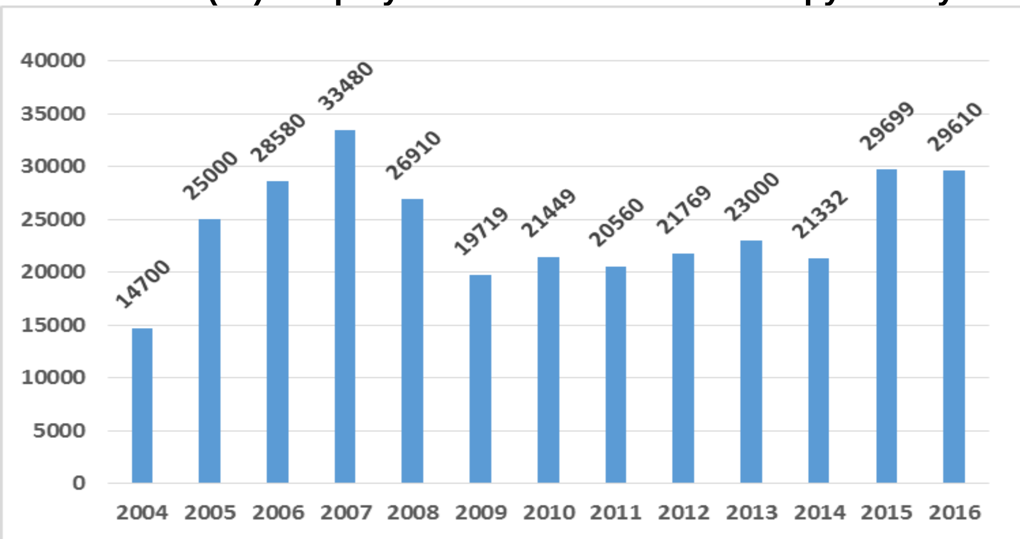


Source: Clarkson Research Services 01/2017

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

GRAPH (38): Employee Numbers in Turkish Shipyards by 2016



(*2016 data includes harbor launch and manufacture place workers)

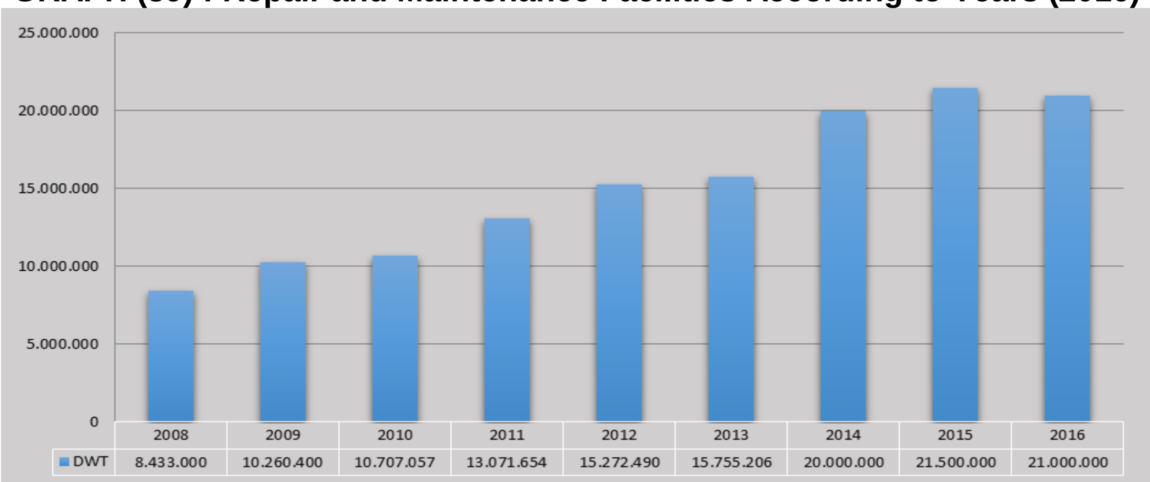
Source: Ministry of Transport, Maritime Affairs and Communications 04/2017

Before 2003; maximum tonnage of 16.000 DWT ship orders (as in one piece) could be taken. By 2007, it has raised up to 180.000 DWT 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.

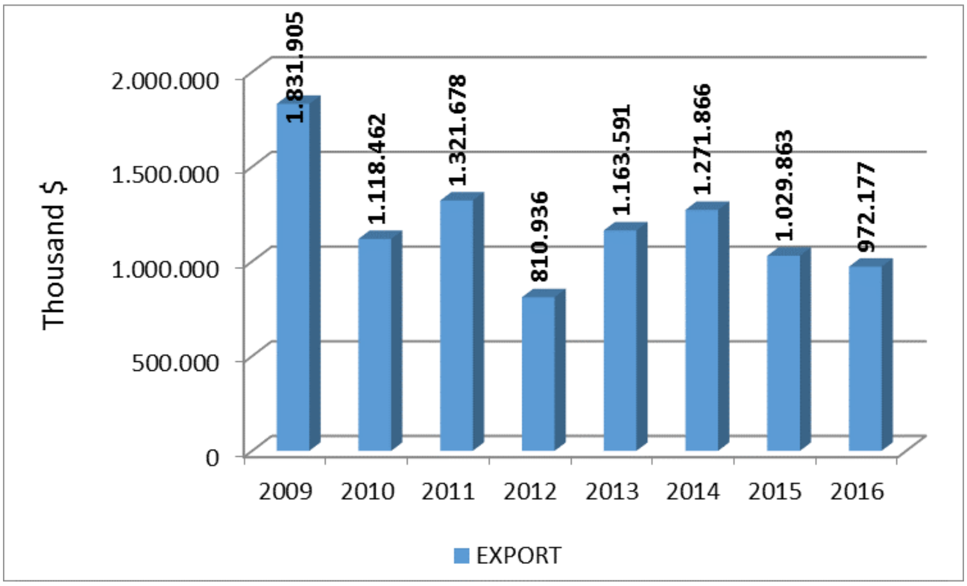
By the end of 2012, orders in our yards was decreased to 0,5 million DWT. Due to lack of new orders, the shipyards are now mostly concern with repair and maintenance facilities. In 2013 in Turkish shipyards 15.755.206 DWT of repair and maintenance had been done. As of 2014, it was app. 20.000.000 DWT and in 2016 it raised up to 21.000.000 DWT.

GRAPH (39) : Repair and Maintenance Facilities According to Years (2016)



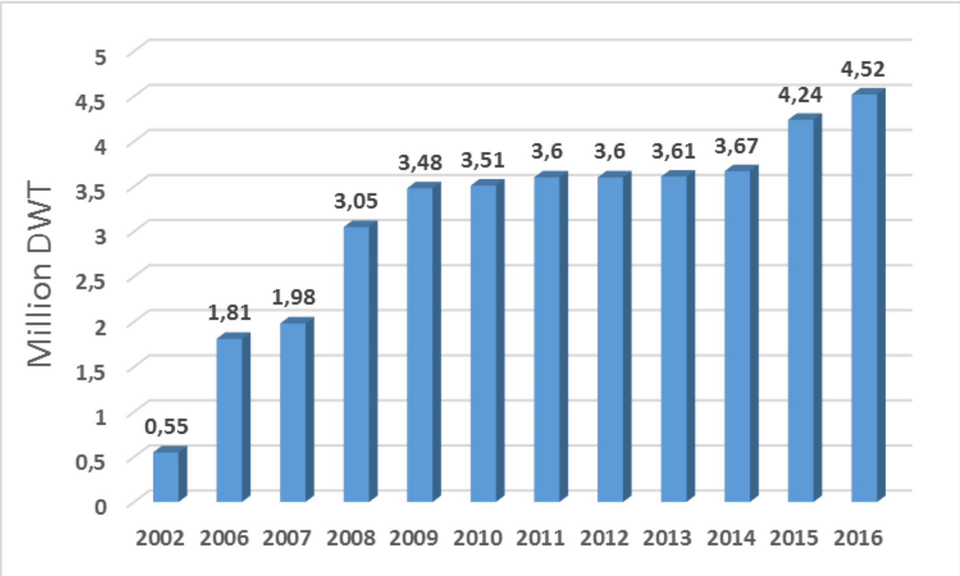
Source: Turkish Shipbuilders'Association (GİSBİR)

GRAPH (40): Export Figures of Turkish Shipbuilding Industry (2009-2016)



Source: Ship and Yacht Exporters Association (e-birlik.net)

GRAPH (41): Shipyards Project Capacities Between 2002-2016



Source: Ministry of Transport, Maritime Affairs and Communications 04/2017

In 2002, our shipyards founded capacity was 550.000 DWT. In 2016 it's reached up to 4,52 million DWT which means a growth more over 6 times then 2002.

As of December 2016, 26 floating docks and 9 dry docks are operative in Turkey

TABLE (45): Floating and Dry Docks in Turkey

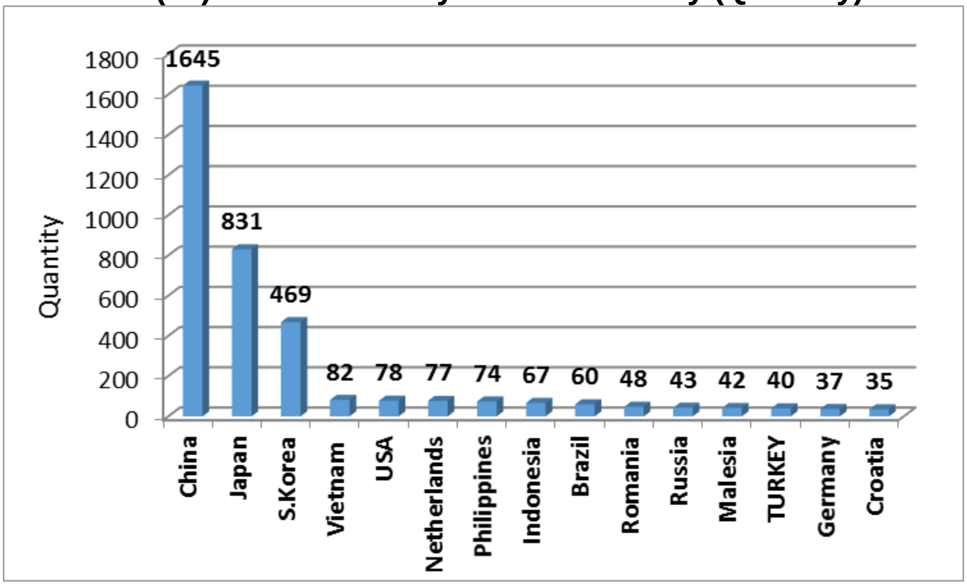
	CITY	Operator	Floating/ Dry Dock	Dimensions	Tonnage
1	İSTANBUL	DENTAŞ İNŞAAT VE ONARIM SAN. A.Ş.	Floating Dock	128x30 m	5.000
2	İSTANBUL	GİSAN GEMİ İNŞA SAN. VE TİC. LTD. ŞTİ.	Floating Dock	167x34 m	9.000
3	İSTANBUL	ÇEKSAN GEMİ İNŞA ÇELİK KONS. SAN. VE TİC. A.Ş.	Floating Dock	130x29 m	7.000
4	İSTANBUL	YARDIMCI GEMİ İNŞA A.Ş.	Floating Dock	155x36 m	8.500
5	İSTANBUL	KUZEYSTAR SHİPYARD	Floating Dock	230x37 m	22000
6	İSTANBUL	KUZEYSTAR SHİPYARD	Floating Dock	190x38 m	40.000
7	İSTANBUL	DEARSAN GEMİ İNŞAAT SANAYİ A.Ş.	Floating Dock	82x27 m	3.000
8	İSTANBUL	İSTANBUL DENİZCİLİK GEMİ İNŞA SAN. ve TİC. A.Ş.	Floating Dock	93x28 m	4.200
9	İSTANBUL	SNR GEMİ İNŞA SANAYİ A.Ş.	Floating Dock	129x40 m	6500
10	İSTANBUL	DESAN DENİZ İNŞAAT SANAYİ A.Ş.	Floating Dock	172x36 m	19000
11	İSTANBUL	DESAN 5442 NOLU PARSEL	Floating Dock	232x52 m	49500
12	İSTANBUL	GEMAK GEMİ İNŞAAT SANAYİ VE TİC.A.Ş.	Floating Dock	233x45 m	28000
13	İSTANBUL	GEMAK GEMİ İNŞAAT SANAYİ VE TİC.A.Ş.	Floating Dock	170x33 m	9000
14	İSTANBUL	HİDRODİNAMİK GEMİ SAN. VE TİC. A.Ş.	Floating Dock	115x22 m	2.750
15	İSTANBUL	GEMSAN GEMİ VE GEMİ İŞLETMECİLİĞİ SAN. VE TİC. LTD. ŞTİ.	Floating Dock	220x45 m	20000
16	İSTANBUL	ÇİNDEMİR MAKİNE GEMİ ONARIM VE TERSANECİLİK A.Ş.	Floating Dock	123x28 m	5000
17	İSTANBUL	ERKAL ULUSLARARASI NAKLİYAT VE TURİZM A.Ş.	Floating Dock	350x80 m	100000
18	YALOVA	BEŞİKTAŞ GEMİ (A-10)	Floating Dock	230x37 m	22000
19	YALOVA	BEŞİKTAŞ GEMİ (A-10)	Floating Dock	382x66 m	70000
20	YALOVA	TERSAN TERSANECİLİK SAN VE TİC AŞ	Floating Dock	109x22,5 m	9000
21	YALOVA	TERSAN TERSANECİLİK SAN VE TİC AŞ	Floating Dock	81,5x17 m	5000
22	YALOVA	HATSAN TERSANESİ	Floating Dock	180x30 m	10000
23	YALOVA	SANMAR TERSANESİ	Floating Dock	84x34 m	3500
24	KASTAMONU	INEBOLU DENIZCILIK SAN. VE TIC. A.S.	Floating Dock	118x29 m	4500
25	İSTANBUL	TURQUOISE YAT SANAYİ A.Ş.	Floating Dock	53x20 m	1300
26	İSTANBUL	TERSAN TERSANECİLİK ve TAŞIMACILIK	Floating Dock	130x30 m	7100
TOTAL					**470.850**

	CITY	Operator	Floating/ Dry Dock	Dimensions
1	İSTANBUL	İSTANBUL ŞEHİR HATLARI (HALİÇ)	Dry Dock	109x22,5
2	İSTANBUL	İSTANBUL ŞEHİR HATLARI (HALİÇ)	Dry Dock	81,5x17
3	İSTANBUL	İSTANBUL ŞEHİR HATLARI (HALİÇ)	Dry Dock	151x16
4	YALOVA	BEŞİKTAŞ GEMİ (A-10)	Dry Dock	235x40x6,5 m
5	İSTANBUL	TUZLA GEMİ ENDÜSTRİSİ A.Ş.	Dry Dock	300x53 m
6	İSTANBUL	SEDEF GEMİ İNŞAATI A.Ş.	Dry Dock	315x50 m
7	İSTANBUL	DENİZ ENDÜSTRİSİ A.Ş.	Dry Dock	210x37 m
8	YALOVA	SEFİNE DENİZCİLİK TERSANECİLİK TURİZM SAN. Ve TİC. A.Ş.	KURU HAVUZ	240x40 m
9	İSTANBUL	URSA GEMİCİLİK BAKIM ONARIM TERSANECİLİK SAN. TİC. A.Ş.	KURU HAVUZ	56x14 m

Source: Ministry of Transport, Maritime Affairs and Communications 04/2017

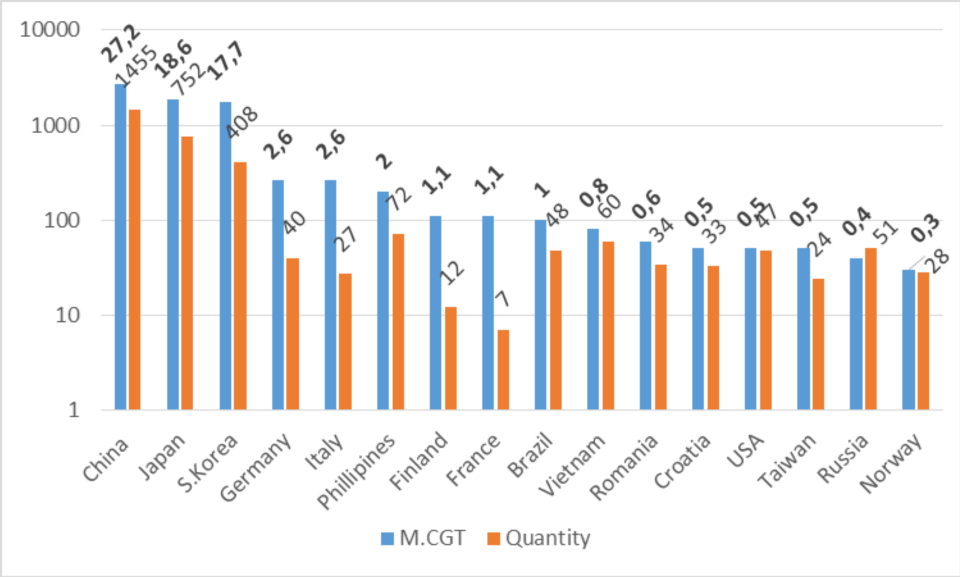
According to quantity Turkish yards are in the 13th place in world ranking

GRAPH (42): Order Book by Builder Country (Quantity)



Source: Clarkson Research Services 01/2017

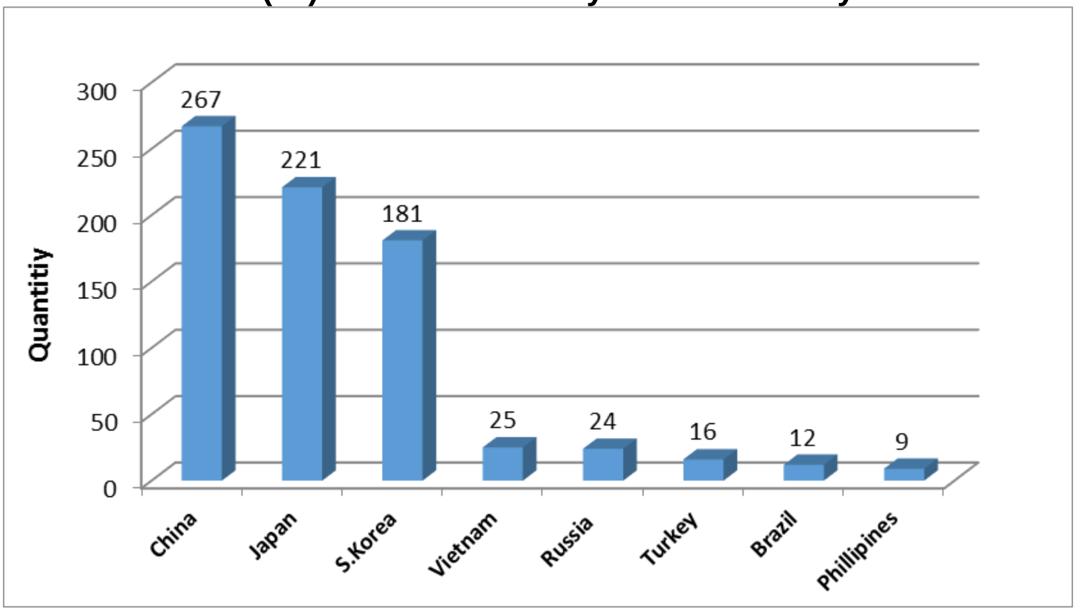
GRAPH (43): Order Book by Builder Country (Quantity/Tonnage - Million CGT)



Source: Clarkson Research Services 04/2017

Our shipyards have a good reputation in building of small and medium tonnage chemical tankers. By April 2017, Turkey was in the 6th place among the countries which take tanker orders.

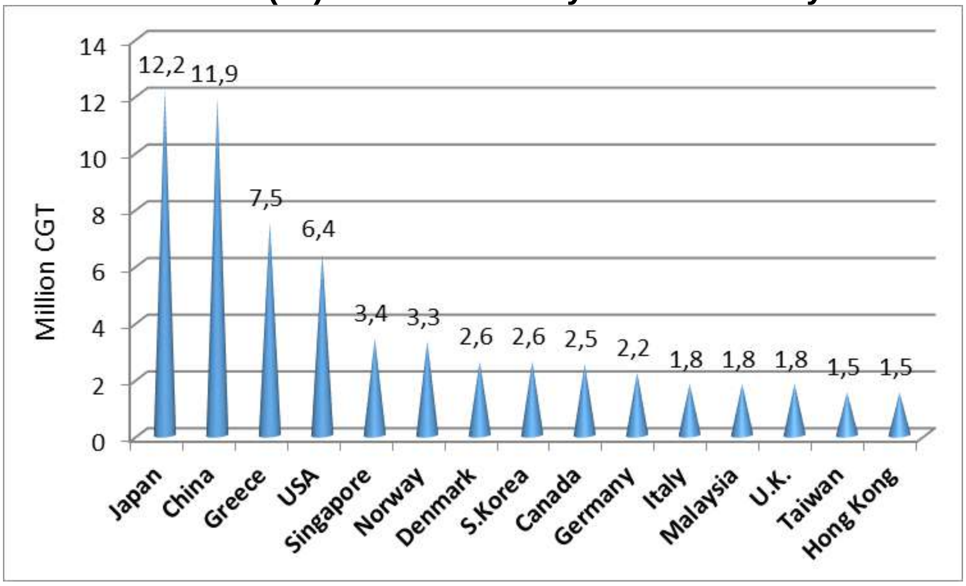
GRAPH (44): Tanker Orders by Builder Country



Source: Clarkson Research Services 04/2017

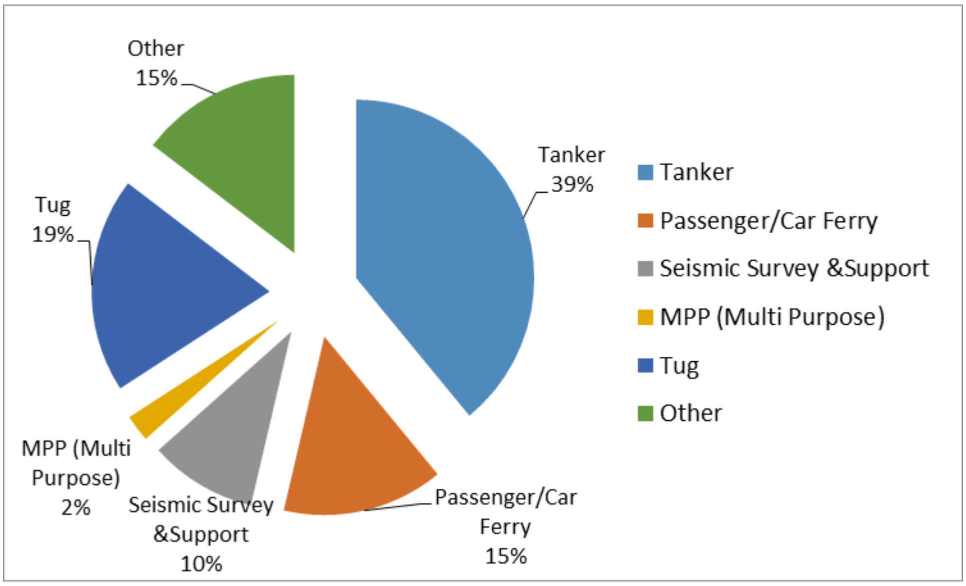
Turkish ship-owners worldwide orders consist of 37 ships about 1,6 million DWT as of April 2017.

GRAPH (45): Order Books by Owner Country



Source: Clarkson Research Services 04/2017

GRAPH (46): Distribution of Orders According to Ship Type



Source: Clarkson Research Services 01/2017

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;

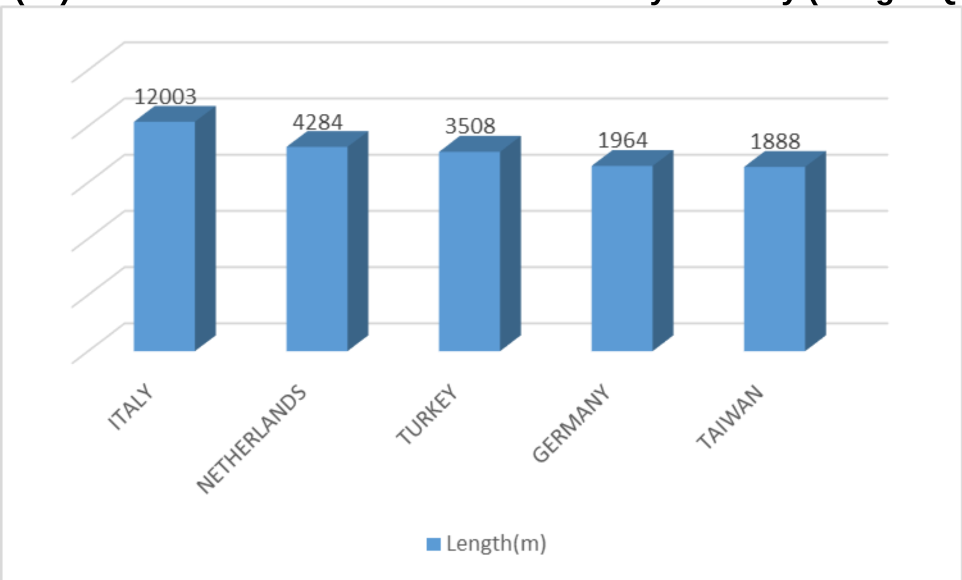
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to international markets
- Appropriate climate
- Our country's potential in boat&yacht building

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 meter+ superyachts, delivered in 2010 were built in 24 different countries.
Turkey is keeping the third place in global order book by the total length of 3.508 meters by the end of 2016.

GRAPH (47): 24 Meters and Above Yacht Orders by Country (Length/Quantity)



Source: Boat International (www.boatinternational.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% percent of the ship's price, is one of the most important branches in shipbuilding industry. It has the highest employment value in sub-sectors. Employment in sub-industry is 33.000 persons in Japan, 65.000 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, and hydraulic units but in electronic equipment especially in navigational systems due to their producer are a few basic worldwide, sector needs to obtain from import resources. Steel sheet production in Turkey can also meet the small amount of the requests.
Turkish Sub-industry is able to produce;
Anchor, chain, bollard, locking equipments - Windlass and equipments - Valves and Central heating Systems - Electric Panels and Tables - Fire Fighting Systems - Pumps - Isolation Equipments - Pipes – Refrigerated Units - Hatch Covers - Diesel generator – Boiler - Carpenter and furnishings.

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

Sub-industry creates 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. By the end of 2014 it's estimated around 50.000 person working in the sub-industry.

TABLE (46): Order Book of Turkish Shipyards as of April 2017

	Hull No.	Type	Dwt	GT	Size	Unit	CGT	Built	Builder	Contract Date	Owner
1	N/A	Accom. Unit		5.000	90	Accommodation	9.038	2018-10	Cemre Shipyard	07.02.2017	Louis-Dreyfus Armat
2	N/A	Chem & Oil	6.850	5.100	6.850	DWT	9.192	2018-05	RMK Marine Shipyard	08.12.2016	Pritchard-Gordon Co.
3	N/A	Crew/Fast Supply	366	427	366	DWT	1.966	2017-09	Damen Antalya	01.11.2016	Al Khaleej
4	N/A	Pass/Car F.		13.000	1.500	Passengers	16.669	2018-	Sefine Shipyard	01.10.2016	Caronte & Tourist
5	N/A	Pass/Car F.		2.700	349	Passengers	5.461	2018-01	Tersan Shipyard	13.06.2016	Fjord1 AS
6	N/A	Pass/Car F.		2.700	349	Passengers	5.461	2018-03	Tersan Shipyard	13.06.2016	Fjord1 AS
7	NB53	MSV		5.000	81	LOA	9.038	2018-05	Cemre Shipyard	06.06.2016	ESVAGT
8	N/A	Pass/Car F.		5.500	1.000	Passengers	9.050	2018-	Cemre Shipyard	06.05.2016	Wightlink Ltd.
9	N/A	Chem & Oil	7.500		7.500	DWT	8.628	2017-09	Icdas Shipyard	01.01.2016	Icdas Celik Enerji
10	20	Products	725	499	725	DWT	1.656	2017-01	Akdeniz Gemi	01.01.2016	Unknown
11	NB48	Maintenance		2.400	58	LOA	5.734	2018-06	Cemre Shipyard	08.12.2015	ESVAGT
12	77	Chem & Oil	5.659	4.028	5.659	DWT	8.073	2017-04	Selah Shipyard	01.12.2015	Armona Denizcilik
13	76	Chem & Oil	13.500		13.500	DWT	11.921	2018-	Selah Shipyard	01.12.2015	Atlantik Denizcilik
14	149	Chem & Oil	5.659	4.028	5.659	DWT	8.073	2017-04	Selah Shipyard	01.12.2015	Armona Denizcilik
15	107	Chem & Oil	6.850	5.100	6.850	DWT	9.192	2017-06	RMK Marine Shipyard	30.10.2015	Pritchard-Gordon Co.
16	105	Asp.& Bit.	7.760	7.398	7.760	DWT	11.279	2017-05	RMK Marine Shipyard	05.08.2015	Tarbit Shpg. AB
17	106	Asp.& Bit.	7.760	7.398	7.760	DWT	11.279	2017-11	RMK Marine Shipyard	05.08.2015	Tarbit Shpg. AB
18	147	Chem & Oil	3.100	1.830	3.100	DWT	5.231	2017-	Selay Shipyard	01.06.2015	Ozpulathane Deniz
19	N/A	Tug		312		HP	1.618	2017-08	Sanmar Ltd	03.03.2015	Fujairah Port Auth.
20	N/A	Tug		312		HP	1.618	2017-04	Sanmar Ltd	03.03.2015	Fujairah Port Auth.
21	59	Tug		270		HP	1.479	2017-09	Eregli Shipyard	01.01.2015	Med Marine
22	60	Tug		270		HP	1.479	2017-09	Eregli Shipyard	01.01.2015	Med Marine
23	55	Tug		270		HP	1.479	2017-07	Eregli Shipyard	01.01.2015	Med Marine
24	56	Tug		270		HP	1.479	2017-07	Eregli Shipyard	01.01.2015	Med Marine
25	57	Tug		270		HP	1.479	2017-08	Eregli Shipyard	01.01.2015	Med Marine
26	58	Tug		270		HP	1.479	2017-08	Eregli Shipyard	01.01.2015	Med Marine

27	21	Products		998		DWT	2.458	2017-01	Nur Istanbul	01.01.2015	Unknown
28	22	Products		998		DWT	2.458	2017-01	Nur Istanbul	01.01.2015	Unknown
29	62	Asp.& Bit.	15.100	11.750	15.100	DWT	14.547	2017-03	Besiktas Shipyard	01.01.2015	Groupe Desgagnes
30	63	Asp.& Bit.	15.100	11.750	15.100	DWT	14.547	2017-06	Besiktas Shipyard	01.01.2015	Groupe Desgagnes
31	60	Asp.& Bit.	15.100	11.750	15.100	DWT	14.547	2017-01	Besiktas Shipyard	06.11.2014	Groupe Desgagnes
32	61	Asp.& Bit.	15.100	11.750	15.100	DWT	14.547	2017-01	Besiktas Shipyard	06.11.2014	Groupe Desgagnes
33	1068	PSV	4.500		4.500	DWT	7.226	2017-06	Tersan Shipyard	07.08.2014	Sevnor Management
34	75	MSV		4.000	98	LOA	7.871	2017-04	Besiktas Shipyard	01.06.2014	Myklebusthaug Manag.
35	H70	PSV	4.000		4.000	DWT	6.716	2017-06	Selah Shipyard	01.01.2014	Marnavi
36	ER53	Tug		484		HP	2.125	2017-02	Eregli Shipyard	01.01.2014	Med Marine
37	ER54	Tug		484		HP	2.125	2017-03	Eregli Shipyard	01.01.2014	Med Marine
38	45	Tug		248		HP	1.403	2017-01	Sanmar Ltd	01.01.2014	Unknown
39	46	Tug		248		HP	1.403	2017-01	Sanmar Ltd	01.01.2014	Unknown
40	N/A	Tug		460		HP	2.059	2017-01	Geta Shipyard	01.01.2014	Unknown
41	N/A	Chem & Oil	7.114	4.684	7.114	DWT	8.772	2017-	Armada Shipyard	23.12.2013	Palmali Shipping
42		Chem & Oil	7.114	4.684	7.114	DWT	8.772	2017-	Armada Shipyard	18.09.2013	Palmali Shipping
43	N/A	Chem & Oil	7.114	4.684	7.114	DWT	8.772	2017-	Armada Shipyard	18.09.2013	Palmali Shipping
44	S1152	AHTS	3.400	5.000	21.760	HP	9.038	2017-04	Tersan Shipyard	01.08.2013	Sevnor Management
45	6	Work/Repair Vsl.	276	180			1.150	2017-01	Almar Ship Building	01.01.2013	Unknown
46	31	Seis. Survey		5.000	86	LOA	9.038	2017-04	Istanbul S.Y.	24.04.2012	Govt of Turkey
47	N/A	Ore/Oil	8.050	5.795	8.050	DWT	7.105	2017-	Gelibolu Shipyd	01.09.2011	Albros Shipping
48	48	MPP	12.107	9.000	12.107	DWT	9.163	2017-	Gelibolu Shipyd	01.01.2011	Albros Shipping

Source: Clarkson Research Ser. 04/2017

CHAPTER IV

PORT DEVELOPMENTS

Ports Information in General

The coastline of Anatolia is 8333 Km long. Total numbers of ports are 180 along the coastline. 7 ports are operated by Turkish Maritime Administrations and 2 ports are operated by Turkish State Railways.

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

GOVERNMENT	**21 PORTS**
MUNICIPALITY	**23 PORTS**
PRIVATE	**136 PORTS**

The major part of international trade is being realized through maritime transportation in Turkey. 87 % of goods (import-export) have been maritime transported in 2016.

Existing Theoretical Capacity of Turkish Ports *(Acc.to 2015 Backfield of Ports, Road and Railway Connections Master Plan)* are as below;

Cargo Type	Theoretical Capacity
Container	**25.543.028 TEU**
General Cargo + Dry Bulk Cargo	**318.246.892 Tons**
Liquid Bulk Cargo	**254.896.000 Tons**
Vehicle	**31.471.560 Tons**

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 South Corridor (TANAP) 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 with technological developments and insufficient railway integrations to ports that will supply cargoes to be distributed fast and on time.

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.

430.201.162 tons of cargo is realized at Turkish ports in 2016.

- 22 % of handling is export with 94.805.120 tons.
- 50 % of handling is import with 215.132.519 tons.
- 12,4 % of handling is cabotage with 53.300.216 tons.
- 15,6 % of handling is transit with 66.963.307 tons.

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

TABLE (47): Cargo Handling Figures At Turkish Ports (Acc. to Transport Mode)

MODE OF TRANSPORT		2012	2013	2014	2015	2016
EXPORT	TURKISH	12.235.897	11.660.647	12.739.297	13.754.810	15.272.855
	FOREIGN	79.071.589	77.893.343	75.797.517	78.397.812	79.532.265
	TOTAL	**91.307.486**	**89.553.990**	**88.536.814**	**92.152.622**	**94.805.120**
IMPORT	TURKISH	26.476.350	22.949.887	20.876.309	22.724.776	23.350.424
	FOREIGN	165.998.578	164.831.728	173.837.477	185.601.532	191.782.095
	TOTAL	**192.474.928**	**187.781.615**	**194.713.786**	**208.326.308**	**215.132.519**
CABOTAGE	LOADING	22.869.458	26.076.342	24.982.892	25.894.384	26.249.991
	UNLOADING	24.049.929	27.861.596	25.746.316	26.578.284	27.050.225
	TOTAL	**46.919.387**	**53.937.938**	**50.729.208**	**52.472.668**	**53.300.216**
TRANSIT	LOADING	50.767.011	46.930.435	44.278.082	58.597.204	61.436.179
	UNLOADING	5.957.420	6.726.780	4.833.478	4.487.893	5.527.128
	TOTAL	**56.724.431**	**53.657.215**	**49.111.560**	**63.085.097**	**66.963.307**
GR.TOTAL	LOADING	164.943.955	162.560.767	157.797.788	176.644.210	182.491.290
	UNLOADING	222.482.277	222.369.991	225.293.580	239.392.485	247.709.872
	TOTAL	**387.426.232**	**384.930.758**	**383.091.368**	**416.036.695**	**430.201.162**

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

GRAPH 47: Cargo Handling Figures According To Years

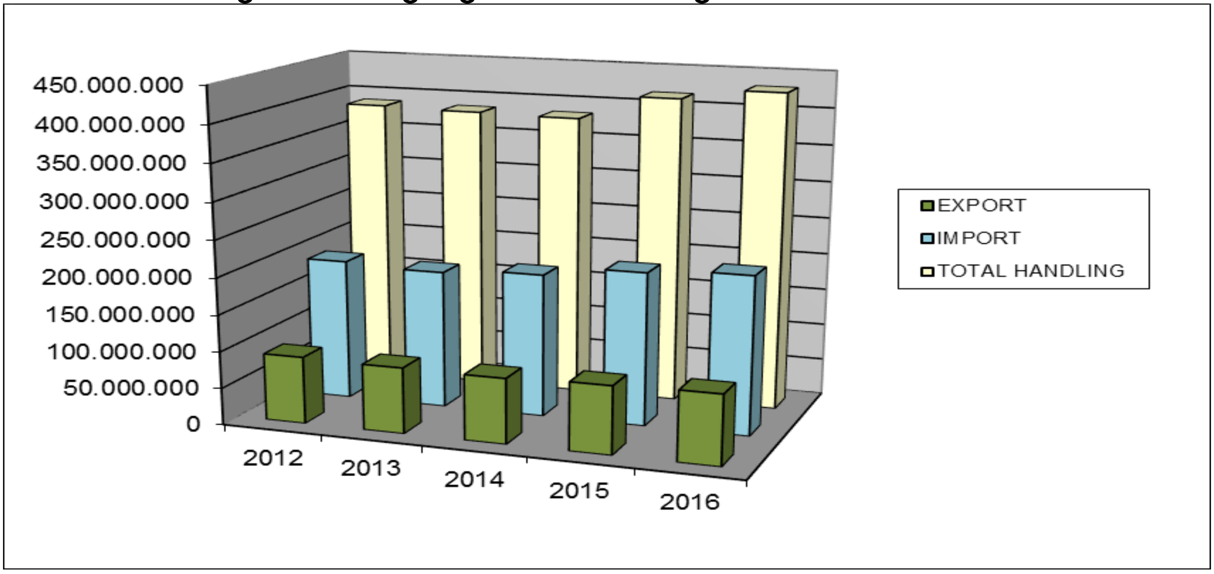
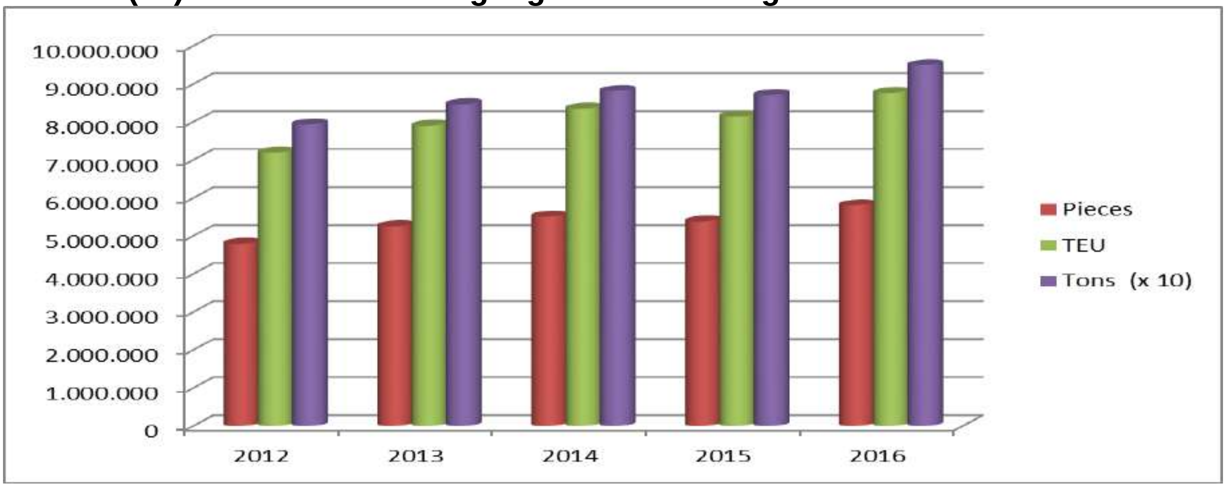


TABLE (48): Container Handling Figures At Turkish Ports

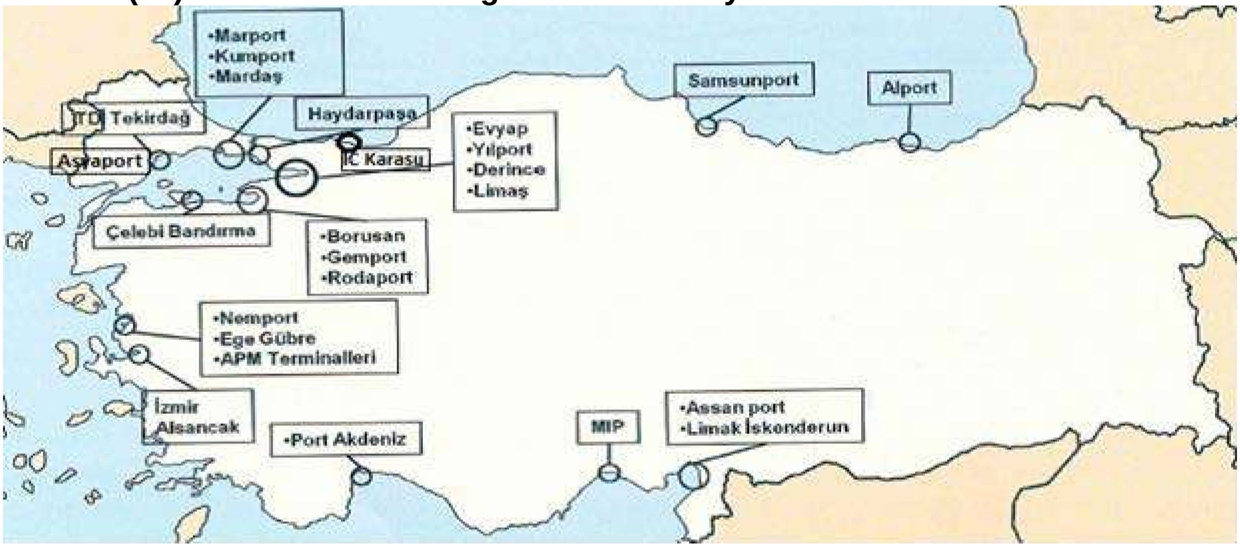
MODE OF TRANSPORT		2012	2013	2014	2015	2016
EXPORT	PCS	1.910.075	2.088.031	2.269.118	2.198.508	2.309.172
	TEU	2.879.122	3.165.653	3.487.949	3.394.508	3.543.804
	TONS	33.199.345	35.456.728	39.106.361	38.419.925	41.444.254
IMPORT	PCS	1.953.229	2.121.533	2.335.795	2.248.636	2.352.515
	TEU	2.942.562	3.199.969	3.581.809	3.454.345	3.607.086
	TONS	29.871.028	30.715.331	34.790.524	34.007.962	35.608.597
CABOTAGE	PCS	342.604	397.602	390.510	454.012	543.526
	TEU	472.345	544.496	526.798	606.064	738.312
	TONS	4.758.088	5.732.348	4.934.786	5.869.320	7.032.995
TRANSIT	PCS	589.019	651027	513.195	481.454	601.662
	TEU	898.368	989.815	754.216	691.481	872.772
	TONS	11.482.912	12.751.785	9.305.368	8.728.650	10.842.751
GRAND TOTAL	PCS	**4.794.927**	**5.258.193**	**5.508.618**	**5.382.610**	**5.806.875**
	TEU	**7.192.396**	**7.899.933**	**8.350.772**	**8.146.398**	**8.761.974**
	TONS	**79.311.373**	**84.656.192**	**88.137.039**	**87.025.857**	**94.928.597**

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

GRAPH (48) Container Handling Figures According To Years



GRAPH (49): 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.

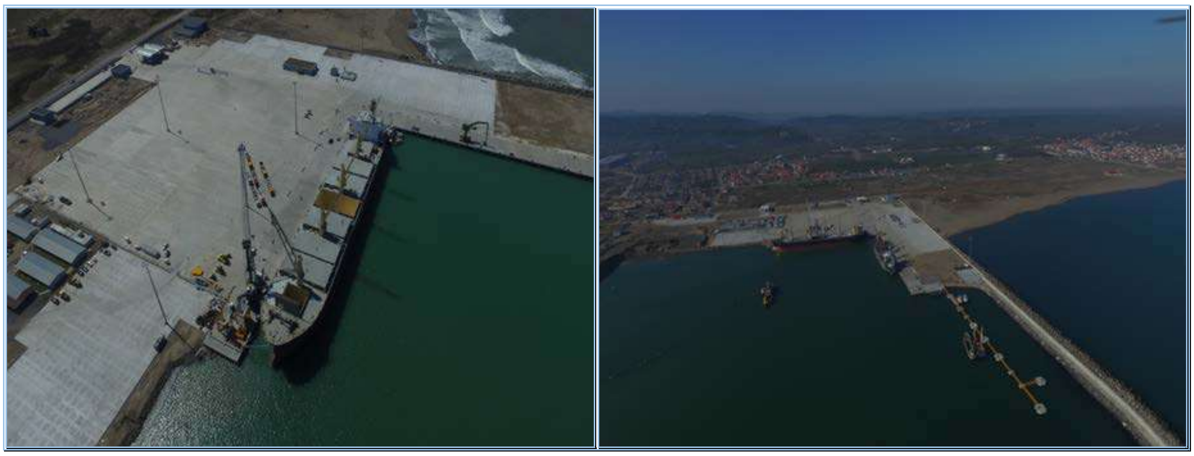
Nowadays ports, in classic terms are not the loading/discharging point of ships, they have become Logistic Centers where, with development of multimodal shipping, various transportation modes intersect. Ports are in a dynamic development, growth and renewing trend as they are obliged to cover the expectations 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 increasing 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	**Load Type**	**Existing Capacity**	**Project End**
Limak İskenderun	Container	1,000,000 TEU	3,000,000 TEU
Toros Tarım (Samsun)	Bulk Solid/General Cargo	3,300,000 Tons	8,500,000 Tons
Aksa	General Cargo	600,000 Tons	4,000,000 Tons
Petkim Container Terminal (Petlim)	Container	800.000 TEU	1,500,000 TEU *(might be increased to 4,000,000 TEU subject to cargo demand in the area in future)*

IC Ictas Sakarya Karasu Port



IC Ictas Sakarya Karasu Port was founded joint venture of IC Altyapi and Ictas Insaat, and put into service in 16th January 2017.

Located as a gateway of Marmara Region through Black Sea on the land of 250.000 m²; the port has a handling capacity of 5 million tons general and bulk cargo, 150.000 TEU container and 110.000 units-vehicles yearly.

State Investments

Presently 3 large scale (mega) projects are planned as state investments.

- Northern Aegean Çandarlı Port is under construction whereas others are at the stage of research and projection. Located at İzmir/Bergama, 1500 meters long breakwater's construction was completed, realizing remaining substructures and superstructures gradually first stage is foreseen to be completed by 2018 at Northern Aegean Çandarlı port. Çandarlı Port construction was divided into two phase. The first phase will be built in three stages (1 m. TEU + 1m. TEU. + 2 m. TEU). The second phase has not been planned yet.
- Located on the east of existing Mersin MIP, new Mersin container port is planned in 5 phases, which aims to provide 1.7-1.9 million TEU in its first phase, followed by further expansion to take total 10 - 11.4 million TEU upon completion.
- Being located in the boundries of Zonguldak/west Black Sea region, Filyos Port will serve to the industrial zone which is planned to be assembled on the background. Upon completion, port will be able to handle 700.000 TEU container and 16 million tons general/bulk cargo.

Besides those projects;

- Derince Container Terminal which will be built on the fill area east of existing Derince Port, will provide 1.000.000 TEU capacity *increase (Derince Container Terminal is a part of Safi Derince Port which has been privatizated.)*
- Capacity of İzmir Port is planned to reach 2.500.000 TEU after privatization.

Turkey in "Doing Business 2015" Report

189 countries are sorted acc. to "doing business facility" taking into 10 criterias in "Doing Business" 2014 Report. Criterias used in sorting consists of elements that facilitate doing business are; starting business, obtaining building licence, getting electricity service connected, making ownership records, loan contracted facility,

investor protection, taxes, cross border trade potential, practibility of business agreements and solving of problems arising from bankrupt. Singapore is at the top of 2015 list as 2014. followed by Hong Kong, New Zealand, USA, Denmark, Malaysia, Korea, Georgia, Turkey's 2015 economic profile was evaluated in report where Turkey upgraded by 14 steps according to last report and located at 55th place.

Sortings determining the location of Turkey in Doing Business Report taking into account 10 criterias are below;

Criteria	Turkey's Location	Best Country
General Sort	55	Singapore
Starting Business	79	New Zealand
Obtaining Building Licence	136	Hong Kong
Getting Electricity Service Connected	34	South Korea
Ownership Record	54	Georgia
Loan Facility	89	New Zealand
Investor Protection	13	New Zealand
Taxes	56	UAE
Cross Border Trade Potential	90	Singapore
Practibility of Business Agreements	38	Singapore
Problem Solving of Bankruptcy	109	Finland

Turkey in Logistic Performance Index 2015 Report

Published by World Bank every 2 years since 2007, countries taken into evaluation has increased by 5 and reached up to 160 in Logistic Performance Index 2014 Report. Germany obtained first place while Somali ranked as last in the report whereas Turkey is located at 30th place.

Logistics Performance of Countries are measured by getting 6000 persons and 1000 entities give points to 6 different criterias by grading between 1 and 5. Gradings are oriented at 8 countries that persons and entities mostly do business with.

Criterias are;

1. Effectiveness of customs clearance and other border processes
2. Quality of infrastructures related to transportation such as ports, railways in terms of logistics.
3. Ease of arrangement and costs of international shipments
4. Quality of logistic services and competence.
5. Follow up and monitoring of shipments
6. Timely delivery of shipments to receivers.

Turkey has taken 34th, 39th, 27th and 30th places by sequence in the 2007, 2010, 2012 and 2014 lists.

Status of Turkey in Logistic Performance Index 2014 Report

Criterias	Turkey's Location 2014		Turkey's Location 2012		Best Countries 2014	Best Countries 2012
	Rank	Score	Rank	Score		
General Sort	30	3.50	27	3.51	Germany	Singapore
Custom	34	3.23	32	3.16	Norway	Germany
Infrastructure	27	3.53	25	3.62	Germany	Hong Kong
Arrangement of shipment	48	3.18	30	3.38	Luxemburg	Finland
Quality and competence	22	3.64	26	3.52	Norway	Finland
Follow up and monitoring	19	3.77	29	3.54	Germany	Singapore
Timing	41	3.68	27	3.87	Luxemburg	Singapore

TDI Ports and Privatizations

TABLE (49): The Ports Operated By Turkish Maritime Administrations (TDİ)							
PORTS	PIER LENGTH (Meters)	DEPTH (Meters)	HANDLING (000x ton/year)	SHIP CAPACITY (number/years)	STORAGE CAPACITY (000x ton/year)	CONTAINER CAPACITY (Teu/year)	PASSANGER CAPACITY (person/years)
SARAYBURNU Pier 1 and 2	242,00	(-8,-12)	-	-	-	-	-
ÇANAKKALE	90,00	(-6,-7)	300	365	-		110.000
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	-		-
TEKİRDAĞ	2.100,00	(-8,-12)	3.000	2.000	-	300.000	-
TOPLAM	**3.703,00**		**3.700**	**3.795**	**200**	**300.000**	**400.000**

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 30 years.

TCDD Ports and Privatizations

Ports Operated By TCDD

PORTS	İZMİR			HAYDARPAŞA		
CAPACITY	Theoretical Cap.	Current Cap.	Improvable	Theoretical Cap.	Current Cap.	Improvable
Total Wharf Length (m)	3.386	--	--	3.413	--	--
Depths (m)	6-10	--	--	5-12	--	--
Port Area (m²)	525.000	--	--	343.420	--	--
Ship Acceptance Capacity (ship/year)	1.305	3.588	2.503	1.169	1.944	5.435
HANDLING CAPACITY						
Container (Teu/Year)	810.208	1.025.624	1.984.018	654.637	481.008	1.217.047
G.Cargo & D.Bulk Cargo (Tons/Year)	1.317.104	4.597.883	5.814.420	1.913.111	231.912	16.374.641
Ro-Ro (Vehicle-Truck / Year)	350.000 V	884.500 V	--	149.100 T	143.988 T	--
Liquid Bulk Cargo (Tons/Year)	--	--	--	--	--	--
STORAGE CAPACITY						
Container (Teu/Year)	611.000	--	--	426.181	--	--
G.Cargo & D.Bulk Cargo (Closed) (Tons/Year)	--	--	--	225.115	--	--
G.Cargo & D.Bulk Cargo (Open) (Tons/Year)	1.299.375	--	--	1.620.000	--	--
Ro-Ro (Vehicle-Truck / Year)	104.354 V	--	--	45.600 T	--	--
Liquid Bulk Cargo (m³/Year)	--	--	--	--	--	--

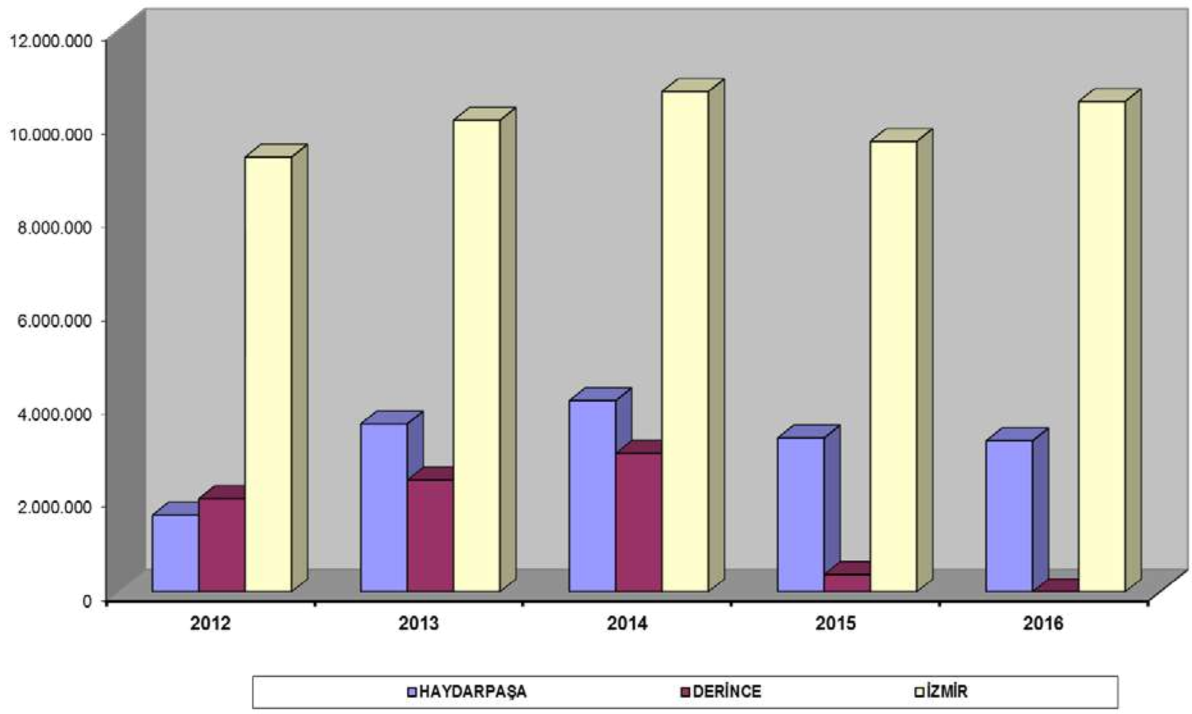
Source: TCDD

TABLE (50): TCDD Ports 2012-2016 Handling Figures Acc. To Cargo Groups

PORT	YEAR	GENERAL CARGO	CONTAINER	DRY BULK	LIQUID BULK	TOTAL
HAYDARPAŞA	2012	417.729	1.219.778	0	0	1.637.507
	2013	1.909.774	951.634	733450	0	3.594.858
	2014	2.759.000	762.088	568900	0	4.089.988
	2015	2.630.004	661.552	0	0	3.291.556
	2016	2.678.024	553.116	0	0	3.231.140
DERİNCE	2012	1.127.186	9.817	756.782	102.107	1.995.892
	2013	1.372.533	10.655	936.987	69.812	2.389.987
	2014	1.473.008	19.525	1.347.509	123.894	2.963.936
	2015	219.011	1.788	149.273	2.977	373.049
	2016	0	0	0	0	0
İZMİR	2012	558.627	6.674.362	1.764.131	304.436	9.301.556
	2013	484.394	7.058.202	2.263.054	284.493	10.090.143
	2014	560.179	6.782.740	3.047.204	314.730	10.704.853
	2015	763.370	6.656.669	1.969.201	247.710	9.636.950
	2016	912.554	7.602.048	1.714.695	261.588	10.490.885
TOTAL	2012	2.103.542	7.903.957	2.520.913	406.543	12.934.955
	2013	3.766.701	8.020.491	3.933.491	354.305	16.074.988
	2014	4.792.187	7.564.353	4.963.613	438.624	17.758.777
	2015	3.612.385	7.320.009	2.118.474	250.687	13.301.555
	2016	3.590.578	8.155.164	1.714.695	261.588	13.722.025

** Derince Port 2015 Tonnage is till end of February*

GRAPH (50): TCDD Ports 2012 – 2016 Handling Figures



GRAPH (51): 2016 TCDD Ports Handling Acc. To Cargo Groups

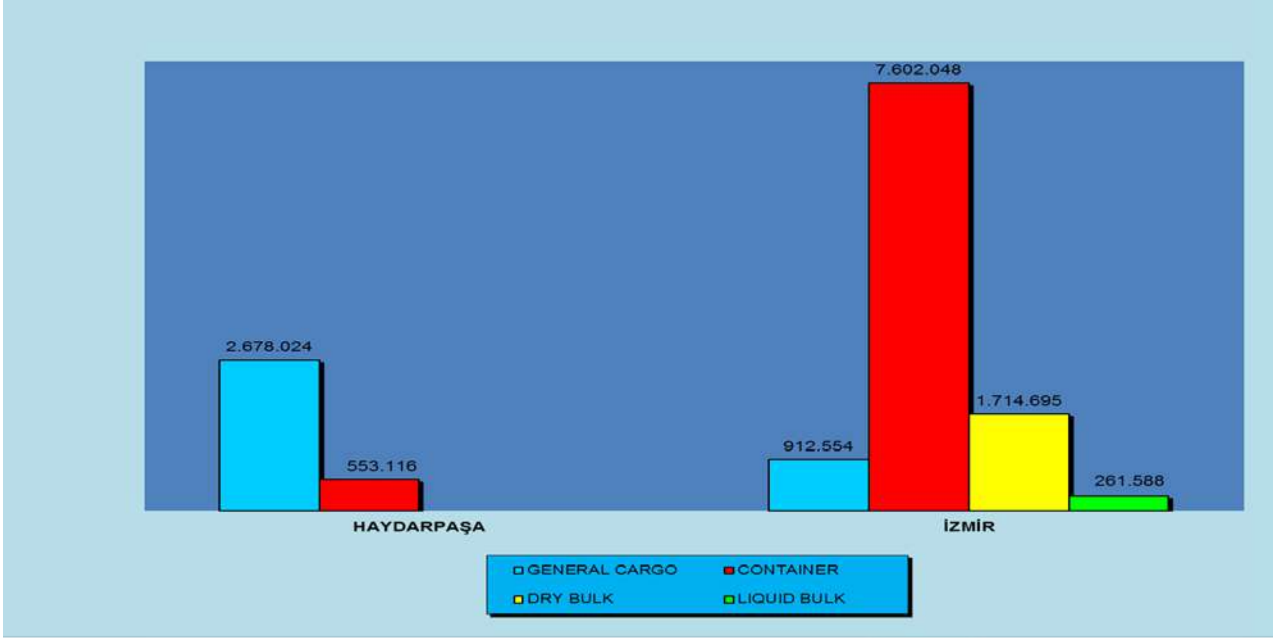
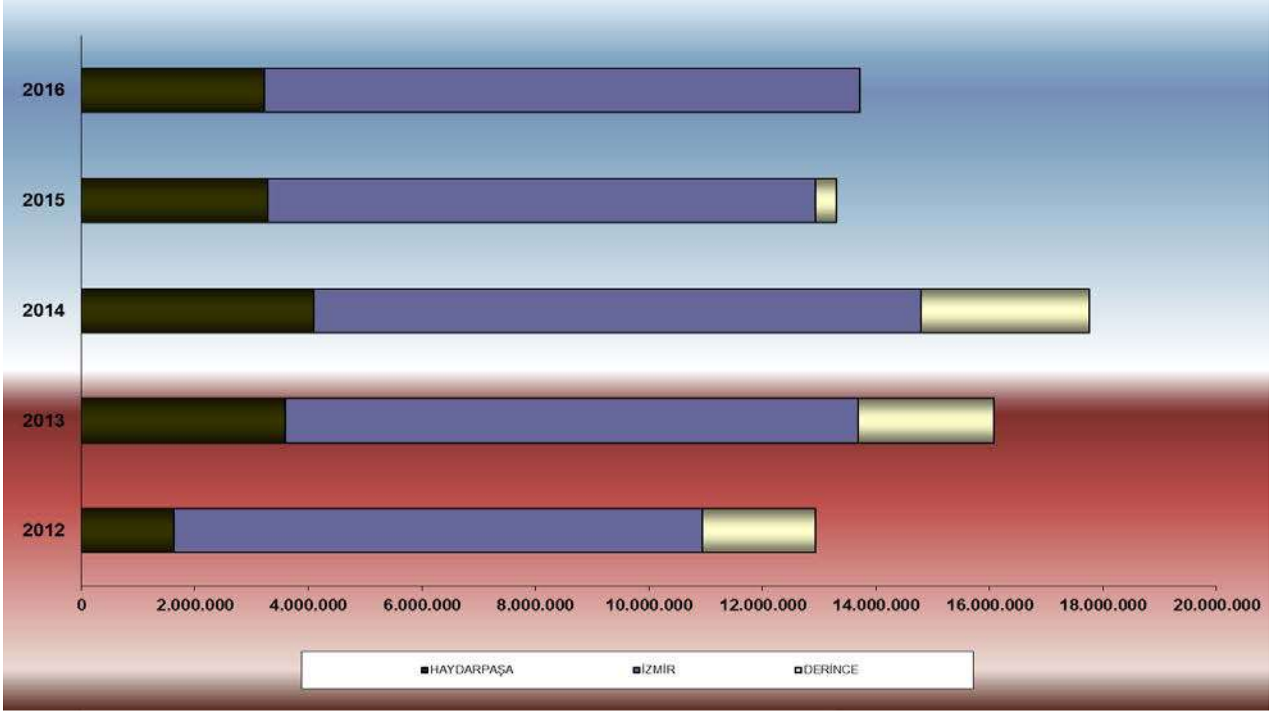


TABLE (51): TCDD Ports Loading And Unloading Figures

YEARS	LOADING			UNLOADING			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
HAYDARPAŞA							
2012	602.875	1.639	0	1.032.993	0	0	1.637.507
2013	1.178.979	733.450	0	1.682.429	0	0	3.594.858
2014	1.559.846	568.900	0	1.961.242	0	0	4.089.988
2015	1.415.146	0	0	1.875.954	456	0	3.291.556
2016	**1.507.124**	**0**	**0**	**1.724.016**	**0**	**0**	**3.231.140**
İZMİR							
2012	5.238.767	48.667	0	3.841.169	172.953	0	9.301.556
2013	5.616.969	12.802	0	4.181.129	279.243	0	10.090.143
2014	5.713.213	23.731	0	4.686.457	281.452	0	10.704.853
2015	4.967.082	0	0	4.397.228	272.640	0	9.636.950
2016	**5.555.580**	**0**	**0**	**4.677.439**	**257.866**	**0**	**10.490.885**
DERİNCE							
2012	1.275.142	15.287	0	668.618	36.845	0	1.995.892
2013	1.422.032	12.618	1.265	844.844	109.218	10	2.389.987
2014	1.559.066	2.863	6.636	1.233.367	160.091	1.913	2.963.936
2015	243.045	130	0	123.329	6.545	0	373.049
2016	**0**	**0**	**0**	**0**	**0**	**0**	**0**
TOTAL							
2012	7.116.784	65.593	0	5.542.780	209.798	0	12.934.955
2013	8.217.980	758.870	1.265	6.708.402	388.461	10	16.074.988
2014	8.832.125	595.494	6.636	7.881.066	441.543	1.913	17.758.777
2015	6.625.273	130	0	6.396.511	279.641	0	13.301.555
2016	**7.062.704**	**0**	**0**	**6.401.455**	**257.866**	**0**	**13.722.025**

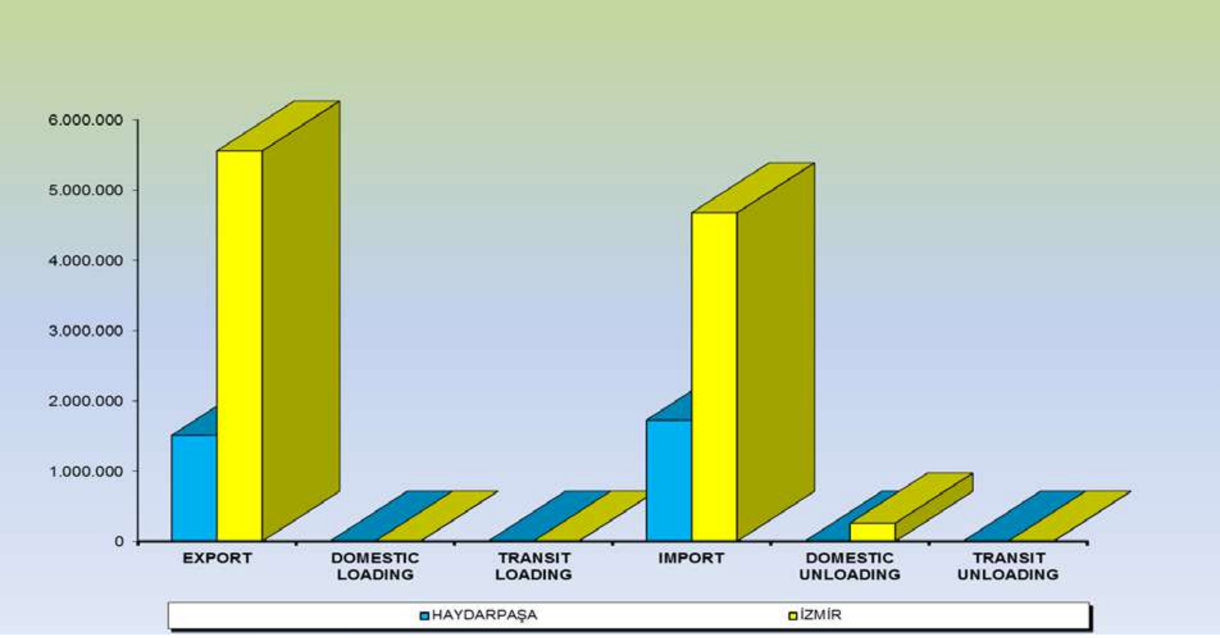
** Derince Port 2015 Tonnage is till end of February*

GRAPH (52): TCDD Ports Handling Acc. To Years (Tons)



Source: TCDD

GRAPH (53): 2016 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

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
DERINCE	12.08.2014	25.02.2015	543 MILLION USD

Privatization Tender Cancelled Ports

PORT NAME	DATE OF TENDER	CANCELLING DATE OF TENDER
İZMİR	03.05.2007	28.04.2010

Source: TCDD & Privatization Adm.

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.

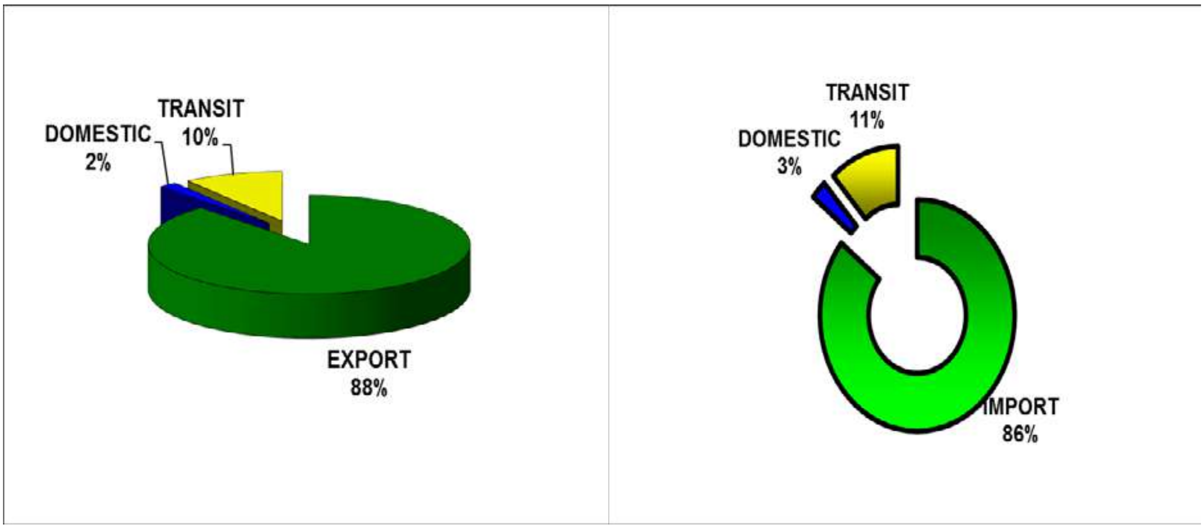
Free Port Zone

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

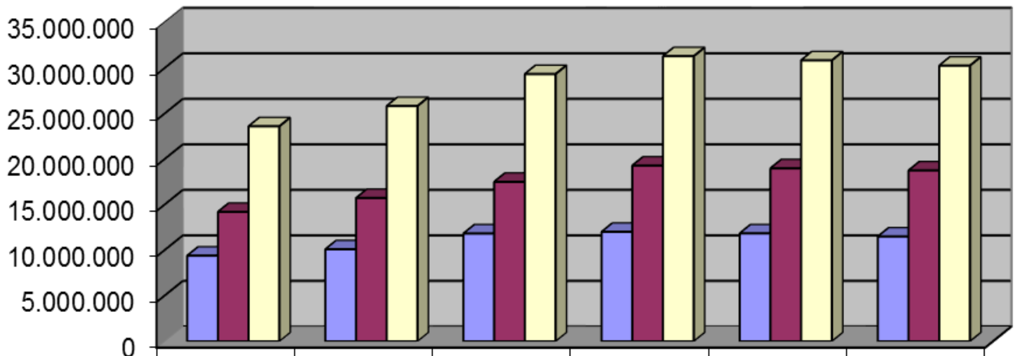
TABLE (52): Handling Figures – Port of Mersin (2016)

MERSIN INTERNATIONAL PORT							
TYPE OF CARGO	LOADING (Tonnes)			UNLOADING (Tonnes)			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
CEMENT	1.167.491	57.497	58.948	3.219	36	401	1.287.592
CEREALS	203.068	60.010	3.060	644.034		8.956	919.128
CHEMICALS	736.030	7.530	30.309	1.990.371	3.070	61.441	2.828.751
CITRUS	141.417		1.577	50.139		2.714	195.847
CNTR			225.675			356.736	582.411
CONST. MACHINERY	15.442		646	14.858		2.732	33.678
COTTON	100.721		619	220.641		3.482	325.463
FERTILIZERS	56.753	26.386	2.486	350.170	41.930	12.055	489.780
FOOD STUFF	1.562.795	1.829	36.297	760.676	428	79.850	2.441.875
FROZEN MEAT	2.798		298	14.020		50.415	67.531
FRUITS	148.593		2.841	205.930		540.222	897.586
GENERAL CARGO	2.635.182	3.951	259.387	3.098.875	25.101	384.222	6.406.718
GLASS	163.044	21	440	33.100		2.774	199.379
LEGUMES	380.708	100	2.157	972.707	100	7.277	1.363.049
LIVESTOCK	48		234	83.391		6.576	90.249
MACHINERY	106.488	13	2.899	115.163	91	7.079	231.733
MINERALS	1.530.383	42.146	480.582	412.631	6.157	501.764	2.973.663
PETR. PRODUCTS	68.750	7.997	1.519	4.867.232	417.292	31.689	5.394.479
RICE	131.895		450	463.499		16.569	612.413
SODIUM CARB.	478.614			12.899			491.513
SUGAR	22.113		7.186	28.650		670	58.619
TEXTILE	412.479	252	12.905	613.826	89	62.128	1.101.679
TIMBER	7.382		3.757	50.516		5.746	67.401
VEGETABLE OIL	60.085		4.230	942.471		13.546	1.020.332
VEHICLES	27.392		7.523	150.284		21.608	206.807
TOTAL	10.159.671	207.732	1.146.025	16.099.302	494.294	2.180.652	30.287.676

GRAPH (54): Mersin Port 2016 Loading & Unloading



GRAPH (55): Mersin Handling Figures Acc. To Years (Tons)



	2011	2012	2013	2014	2015	2016
LOADING	9.408.775	10.106.10	11.845.82	12.025.45	11.859.04	11.513.42
UNLOADING	14.213.50	15.746.02	17.515.01	19.303.22	19.006.86	18.774.24
TOTAL HANDLING	23.622.27	25.852.12	29.360.83	31.328.67	30.865.90	30.287.67

Source: Mersin DTO, 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. Samsun port has railway and road connections with Kastamonu, Ankara, Kirsehir, Kayseri, Nigde, Konya, Malatya, Sinop, Corum, Amasya, Ordu, Sivas, Erzincan, Yozgat, Tokat. Samsun port 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 Samsun port, 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 10,5 meters.
Dock number 6 has a length of 180 meters and drafts of 6,5 / 7 meters.
Dock numbers 7-8-9 have lentgh of 400 meters and drafts of 6,5 / 7 meters.

Industry Dock

Dock numbers 10-11-12 have length of 400 meters and a draft of 12 meters.
Dock number 8 is Rail ferry Ramp, suitable for 1520 mm rail cars.

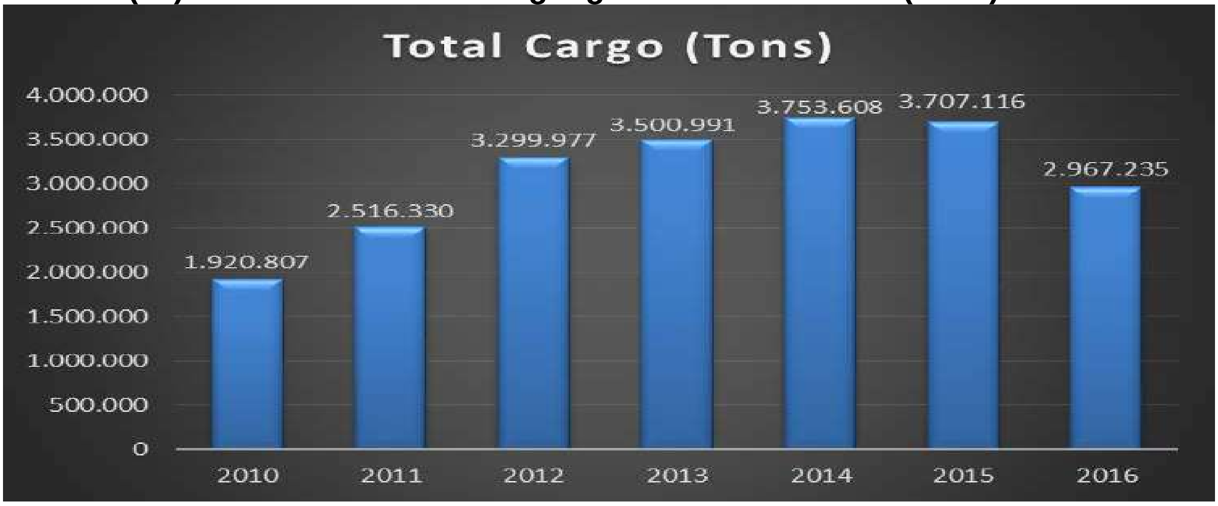
986 vessels called Samsun Port in 2016. Handling Figures of Samsun Port according to cargo groups are as below;

TABLE (55): Handling Figures of Samsun port Acc. To Years

Year			No. of Ships	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (Tons)	Ro-Ro (Tons)	Wagon Ferry (Tons)	**Total (Tons**
2016			986	1.459.473	38.936	569.239	627.007	266.376	6.206	2.967.2
2015			1484	1.543.466	56.470	802.569	658.451	629.874	16.287	3.707.1
2014			1423	1.665.403	48.559	794.776	589.552	617.128	38.190	3.753.6
2013			1250	1.657.680	61.558	761.662	486.623	491.547	41.921	3.500.9
2012			1391	1.543.651	55.742	716.700	393.184	528.682	62.018	3.299.9
2011			1183	1.064.298	14.848	805.635	82.212	527.013	22.324	2.516.3
2010			1013	844.993	32.008	637.415	4.015	402.376	0	1.920.8

Source: Samsunport

GRAPH (56): Samsun Port Handling Figures Acc. To Years (Tons)



Çelebi Bandırma Port

Port Features	
Coordinates	40 º 21' 45'' N - 027º 57' 50'' E
Types of Cargo	Bulk, General, Liquid, Ro-Ro, Container
Area Capacity	
Total Port Area	268.348 m²
Total Storage Area	215.569 m²
Customs Area	268.348 m²
Equipment Parking Area	1.500 m²
CFS	8.000 m²
Total Dock Length	2.973 m
Cargo Capacity	
Containers (Teu/Year)	350.000
Bulk (Tons/Year)	10.000.000
General (Tons/Year)	1.000.000

Liquid Bulk (Tons/Year)	1.000.000
Storage Capacity	
Containers (TEU)	4.195
Bulk / Open Area (Tons)	165.000
Bulk / Closed Area (Tons)	35.000
General (Tons)	110.000
Vessel Acceptance Capacity	
Container (Vessel/Year)	330
Dry Bulk (Vessel/Year)	3.240
Liquid Bulk (Vessel/Year)	216
General Cargo (Vessel/Year)	216
Ro-Ro (Vessel/Year)	13.140

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. 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.

At the port’s 20 docks with a total length of 2,973 meters and with depths ranging from 6 to 11.5 meters, the facility handles bulk cargo, breakbulk cargo, containers, liquid cargo and Ro-Ro vessels. Loading and unloading services are carried out by high-technology mobile cranes, excavators and conveyor system.

The port has two breakwaters, one with a length of 1,000 meters and the other 500 meters, with a clearing of 225 meters between.

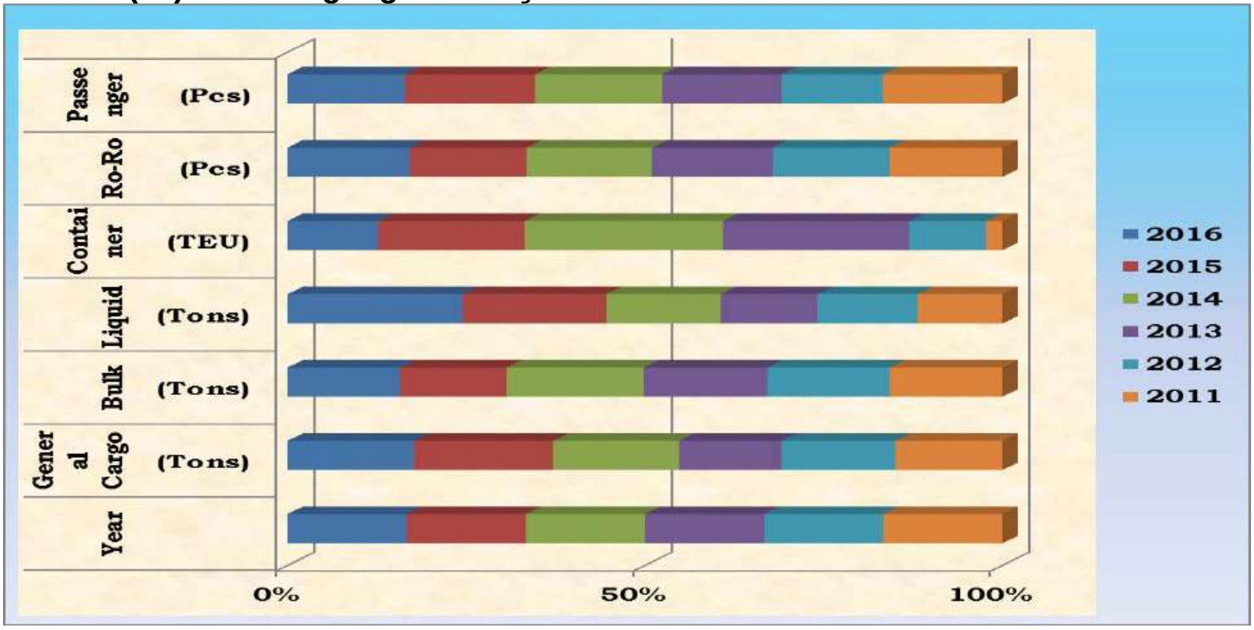
The port of Bandırma boasts the capability to meet the needs of all types of cargoes with 2 Reggiane MHC 200, 1 Gottwald HMK 170,1 Sennebogen 880 EQ, 1 Sennebogen 870 Special, 2 Sennebogen 835R Special, 3 Sennebogen 835M Special, 1 Sennebogen 305, 1 Hyster Block Marble loader with capacity 32 tons, five forklifts, two stackers with carrying capacities of 45 tons, one side lifter with a capacity of 8 tons, three mini-loaders, two loaders and other equipment.

TABLE (54): Handling Figures of Çelebi Bandırma Port Acc. To Years & Cargo Groups

Year	General Cargo (Tons)	Dry Bulk (Tons)	Liquid Bulk (Tons)	Container (TEU)	Ro-Ro (Pcs)	Passenger (Pcs)
2016	407.894	3.210.578	394.026	11.471	215.090	951.788
2015	449.275	3.035.469	324.024	18.613	205.890	1.052.971
2014	406.026	3.906.540	257.143	25.163	220.534	1.028.496
2013	330.778	3.521.039	217.981	23.628	213.201	966.739
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

Source: Çelebi Bandırma Port

GRAPH (57): Handling Figures of Çelebi Bandırma Port



Limakport İskenderun

Coordinates	36° 36' N, 36° 11' E
Port Field Area	1.000.000 (m2)
Berthing Place Lengths	1.652 (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 1375 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.

TABLE (55): Handling Figures of Limakport İskenderun

Bulk Cargo / General Cargo / Container

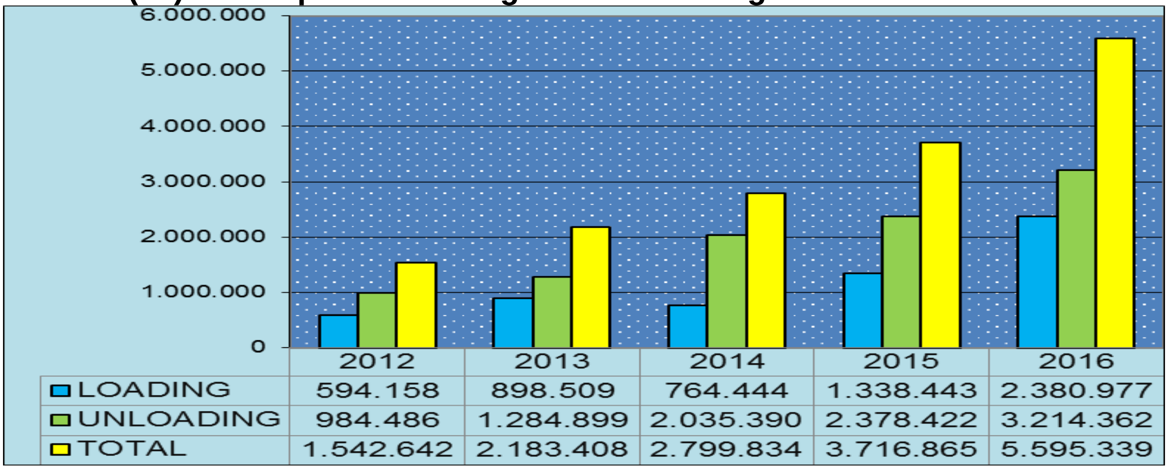
Year	Loading (Tons)	Unloading (Tons)	**Total (Tons)**
2012	594.158	984.486	**1.542.642**
2013	898.509	1.284.899	**2.183.408**
2014	764.444	2.035.390	**2.799.834**
2015	1.338.443	2.378.422	**3.716.865**
2016	2.380.977	3.214.362	**5.595.339**

Ro-Ro / Ro-Pax

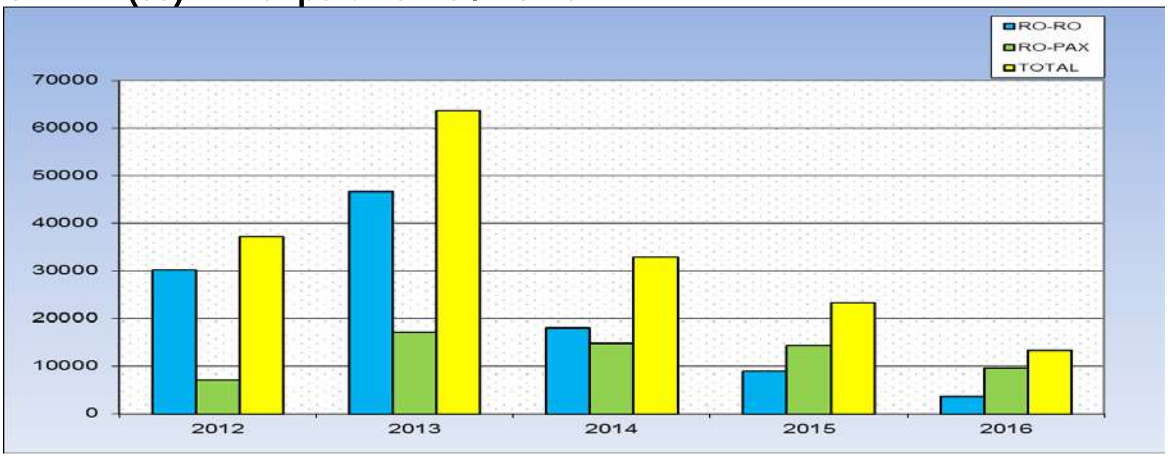
Year	Ro-Ro	Ro-Pax	**Total**
2012	30.208	6.982	**37.190**
2013	46.602	17.087	**63.689**
2014	18.066	14.736	**32.802**
2015	8.888	14.355	**23.243**
2016	3.648	9.635	**13.283**

Source: Limakport İskenderun

GRAPH (58): Limakport Bulk Cargo / General Cargo / Container



GRAPH (59): Limakport Ro-Ro / Ro-Pax



Safi Derince International Port

Located in the Marmara Region, to the northern part of Izmit Gulf; Safi Derince International Port serves different type of commodities and cargo groups including Ro-Ro, project cargo, dry bulk, general cargo, liquid cargo, containers and railway carriages.

Port Area	1.200.000 m²
Tank Capacity	1.500.000 m³
Container Handling Capacity	2.500.000 TEU
Dry Bulk Cargo Handling Capacity	10.000.000 Tons
Ro-Ro Capacity	1.500.000 Vehicle/Unit)

Rıhtım	Boy(m)	Draft(m)
1-2	90	14
3-4	440	15
5-6	550	12
7	160	10
8	120	5,5

The currently existing open storage area is 450.000 m². There are two new enclosed warehouses (1800 m² and 2500 m²) completed and third one (5000 m²) to be completed.

Equipments
- Mobile Cranes (35tons/200tons)
- Forklifts (3tons/35tons)
- Mini Loader
- Reachstacker / Emptystacker
- Excavators
- Warehouses (35 tons overhead crane)
- Gottwald (2x125 tons)
- Sennebogen 870 Serial Excavator Crane
- Tractors
- Trailer
- Tug Master (90tons/150tons)
- STS/RTG/RMG

TABLE (58): Handling Figures of Safi Derince International Port Acc. To Years And Cargo Groups

Year	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (TEU)	Ro-Ro (Pcs)
2015	1.675.290	18.533	510.241	1.983	450.860
2016	1.876.300	16.865	626.400	6.750	422.350

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

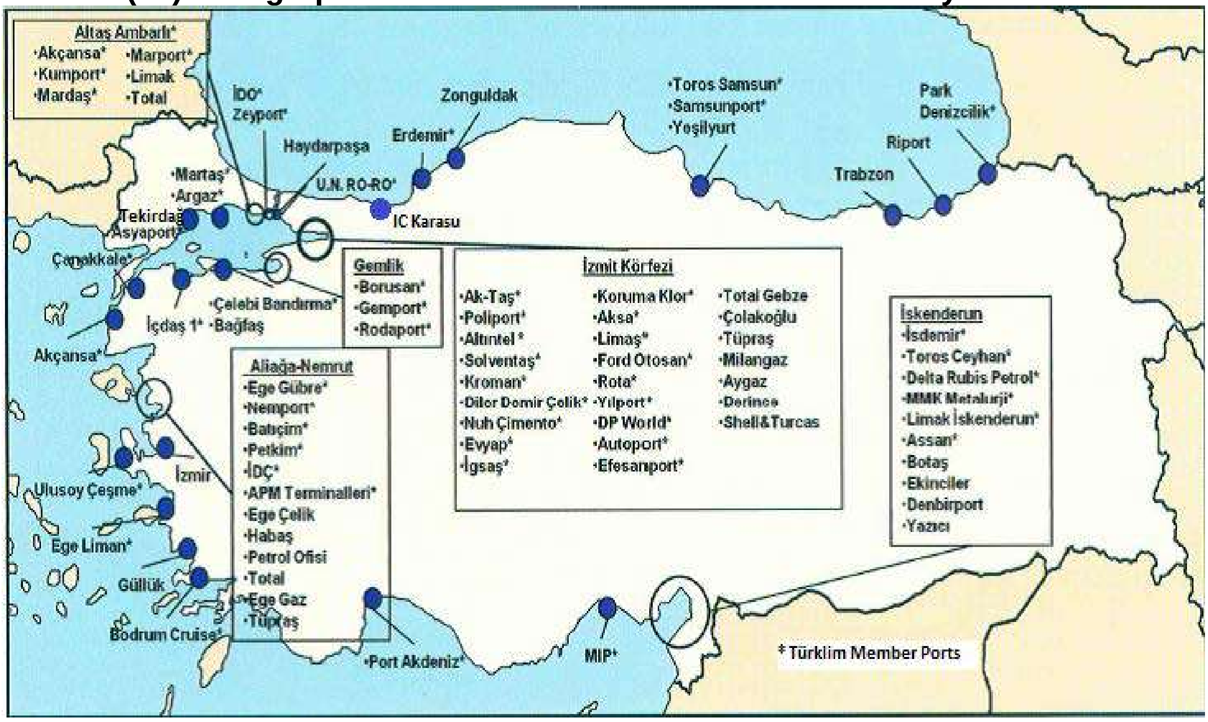
TABLE (56): Private Ports List

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
7) AKÇANSA ÇANAKKALE LİMANI
8) BAGFAŞ İSKELESİ
9) ÇELEBİ BANDIRMA LİMANI
10) BORUSAN LİMANI
11) BP GEMLİK TERMİNALİ
12) GEMLİK GÜBRE LİMANI
13) GEMPORT
14) RODA LİMANI
15) İÇDAŞ İSKELESİ
16) DOLAMİT MADENCİLİK RIHTIMI
17) ÖZGÜMÜŞ MADENCİLİK RIHTIMI
18) ASYAPORT
19) AUTOPORT LİMAN İŞLETMELERİ A.Ş.
20) AKÇANSA AMBARLI LİMANI
21) AMBARLI DEPOLAMA TESİSLERİ
22) ANADOLU ÇİMENTO TESİSLERİ
23) LİMAK AMBARLI TERMİNALİ
24) AYGAZ LPG DEPOLAMA VE DOLUM TESİSLERİ
25) ÇEKİSAN ÇEKMECE DEPOLAMA
26) KUMPORT LİMANI
27) MARDAŞ
28) MARPORT
29) PETROL OFİSİ HARAMİDERE TESİSLERİ
30) TOTAL HARAMİDERE İSKELESİ
31) ANADOLU YAKASI KUMCULARI İSKELELERİ
32) MOBIL OIL SERVİBURNU İSKELESİ
33) PETROL OFİSİ ÇUBUKLU TESİSLERİ
34) ZEYPORT
35) AKÇANSA YALOVA ÇİMENTO TERMİNALİ İSKELESİ
36) AKSA AKRİLİK KİMYA SANAYİ A.Ş.

37)AKTAŞ TERMİNALİ 38)ALEMDAR DİLİSKELESİ 39)ALTINTEL İSKELESİ 40)AYGAZ YARIMCA DOLUM TESİSİ 41)ARGAZ LPG AKARYAKIT DOLUM VE DEPOLAMA TESİSİ 42)ÇOLAKOĞLU METALURJİ TESİSLERİ 43)DİLER LİMAN TESİSLERİ 44)EVYAP DENİZ İŞLETMECİLİĞİ LOJİSTİK VE İNŞAAT A.Ş. 45)FORD OTOSAN YENİKÖY İSKELESİ 46)GÜBRETAŞ TESİSLERİ 47)HABAŞ TERMİNALİ 48)İGSAŞ İSTANBUL GÜBRE SANAYİ A.Ş. 49)EFESAN PORT 50)KIZILKAYA LİMANI 51)KORUMA KLOR ALKALİ SAN. VE TİC. A.Ş. 52)KROMAN ÇELİK LİMAN TESİSLERİ 53)LAFARGE ASLAN ÇİMENTO İSKELESİ 54)LİMAŞ İZMİT TERMİNALİ 55)MARMARA TRANSPORT İSKELESİ 56)MİLANGAZ ŞAMANDIRA TESİSLERİ 57)NUH ÇİMENTO SAN. A.Ş. (NUHPORT) 58)OPAY PLATFORM İSKELESİ 59)PETLINE PLATFORMU 60)PETROL OFİSİ DERİNCE İSKELESİ 61)POLİPORT 62)SEDEF KONTEYNER TERMİNALİ VE LİMAN İŞLETMELERİ 63)SHELL DERİNCE TESİSLERİ 64)SOLVENTAŞ 65)TOTAL GEBZE TERMİNALİ 66)TURKUAZ İSKELESİ 67)TÜPRAŞ İZMİT RAFİNERİ TESİSLERİ 68)TÜPRAŞ KÖRFEZ SIVI YÜK İSKELESİ 69)YALOVA ELYAF İSKELESİ 70)YARIMCA ROTA LİMANI 71)SAFİ DERİNCE LİMANI 72)DP WORLD YARIMCA LİMANI 73)ERDEM EREĞLİ ÇİMENTO ÖZEL LİMANI 74)ERDEMİR LİMANI 75)EREN HOLDİNG LİMANI 76)BÜTANGAZ TERMİNALİ 77)OPET MARMARA TERMİNALİ İSKELE VE PLATFORMU 78)SALIPAZARI KRUVAZİYER LİMANI 79)MARTAŞ MARMARA EREĞLİSİ LİMAN TESİSLERİ 80)ÇAYIROVA CAM SANAYİ İSKELESİ 81)GİSAŞ TUZLA İSKELESİ 82)U.N. RO-RO PENDİK LİMANI 83)YILPORT
84)AKDENİZ KİMYA NEMPORT LİMANI 85)EGE ÇELİK LİMANI 86)EGE GÜBRE LİMANI 87)EGE GAZ LNG TERMİNALİ 88)HABAŞ İSKELESİ 89)BATIÇİM A.Ş. BATI LİMAN TESİSLERİ

90)İDÇ LİMANI 91)PETROL OFİSİ ALİAĞA TESİSLERİ 92)TOTAL OIL İSKELESİ 93)TÜPRAŞ LİMANI 94)PETKİM LİMANI 95)PETLİM KONTEYNER LİMANI 96)BODRUM CRUISE PORT 97)GÜLLÜK LİMANI 98)ÇEŞME LİMANI 99)DİKİLİ İSKELESİ 100) MOPAK İSKELESİ 101) KUŞADASI YOLCU LİMANI 102) MARMARİS LİMANI
103) LİMAKPORT İSKENDERUN 104) TOROS CEYHAN TERMİNALİ 105) SAVKA MERSİN TERMİNALİ 106) ADVANSA SASA POLYESTER TESİSLERİ 107) ÇEKİSAN ŞAMANDIRASI 108) GÜBRETAŞ SARISEKİ İSKELESİ 109) İSDEMİR LİMANI 110) DELTA PETROL LİMANI 111) ORHAN EKİNCİ İSKELESİ 112) YAZICI İSKELESİ 113) ATAŞ TERMİNALİ 114) MERSİN LİMANI 115) MMK ATAKAŞ DÖRTYOL LİMAN İŞLETMESİ 116) MESBAŞ RIHTIMI 117) SAVKA PLATFORMU 118) SANKO LİMAN TESİSİ 119) ENERJİ MERSİN TERMİNALİ
120) IC KARASU LİMANI 121) SAMSUNPORT 122) TOROS TARIM SANAYİİ SAMSUN LİMAN İŞLETMESİ 123) SÜRSAN ŞAMANDIRASI 124) ORDU LİMANI 125) AYGAZ ŞAMANDIRALARI 126) PETROL OFİSİ ŞAMANDIRALARI 127) TOTAL OIL ŞAMANDIRASI 128) YILDIZ ENTEGRE AĞAÇ SAN. ŞAMANDIRASI 129) SİNOP LİMANI 130) YEŞİLYURT LİMANI
131) GİRESUN LİMANI 132) PARK DENİZCİLİK HOPA LİMAN İŞLETMELERİ A.Ş. 133) RİPORT 134) ÜNYE ÇİMENTO TESİSİ LİMANI 135) POAŞ ŞAMANDIRA TESİSLERİ 136) TRABZON LİMANI

GRAPH (60): Geographical Distribution of Main Ports in Turkey

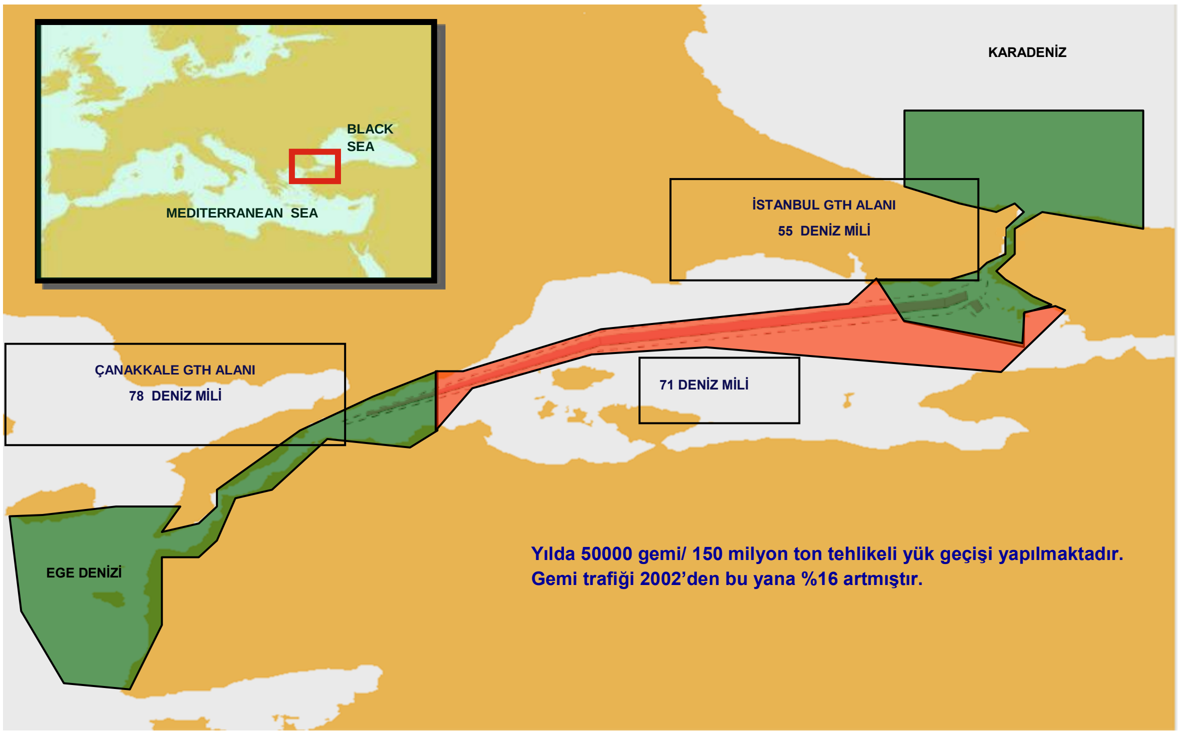


Source: TURKLIM

THE TURKISH STRAITS

Turkish Straits Vessel Traffic Services- Additional Traffic Monitoring Stations

The Turkish Straits Vessel Traffic Services (TBGTH) System was established by the Ministry in order to increase the safety of navigation, life, property and environment and to organize marine traffic more effectively in the Turkish Straits area where a total of 50,000 ships annually pass through, and was transferred to the General Directorate of Coastal Safety, which is the related organization of the Ministry for the purpose of operation, and was operational as of 30 December 2003. Updating system of the General Directorate of Coastal Safety continues.



The Automatic Identification System (OTS) was established in 2007 to monitor ship movements in all the territorial waters of our country, including the Bosphorus Region, for the purpose of safety, life, property and environmental safety. In addition, with the Vessel Traffic Management System Project, the Ship Traffic Management Center, where a single maritime image was built and transferred to the General Directorate of Coastal Safety for the completion of the installations of the Regional Vessel Traffic Services Systems covering İzmit Bay, İzmir Bay and Northern Aegean and Mersin and İskenderun Gulf Regions, Is continuing. Regional VTS Systems consist of 24 Traffic Surveillance Station and 3 Vessel Traffic Services Centers, including İzmit, Mersin and İzmir.

TABLE (57): THE STATİSTİCS SUMMARY OF VESSELS PASSED ISTANBUL STRAİT

AYLAR / *Months*	Number Of Vessels	*Total Gross Tonnage*	/ With Pılot	*Sp1 Given*	Non Call In Vessels	/ *LOA Longer Than 200 M*	Lower Than 500 GT	Total Tankers			/ Towaged
								TTA	LPG/LNG	TCH	
January	**3.103**	41.342.718	1.681	3.077	1.807	284	41	492	89	143	4
February	**3.146**	41.688.172	1.703	3.111	1.880	283	43	460	104	115	4
March	**3.786**	51.423.593	2.031	3.744	2.289	352	44	551	102	149	6
April	**3.612**	45.378.529	1.808	3.580	2.182	300	46	468	90	142	7
May	**3.754**	45.786.750	1.960	3.718	2.192	283	57	498	92	143	6
June	**3.463**	44.379.390	1.783	3.425	2.024	300	52	506	99	141	5
July	**3.504**	47.929.178	1.816	3.458	2.242	338	48	497	74	125	5
August	**3.714**	50.140.136	1.995	3.684	2.330	339	36	454	80	124	10
September	**3.619**	48.219.584	1.838	3.595	2.283	330	37	500	68	129	12
October	**3.738**	51.755.564	1.913	3.702	2.388	377	39	527	75	156	3
November	**3.610**	48.218.615	1.872	3.567	2.251	339	50	524	56	150	6
December	**3.504**	49.020.058	1.956	3.471	2.182	348	29	556	60	164	5
Total	**42.553**	**565.282.287**	**22.356**	**42.132**	**26.050**	**3.873**	**522**	**6.033**	**989**	**1.681**	**73**

TABLE (58): THE STATİSTİCS SUMMARY OF VESSELS PASSED CANAKKALE STRAİT

AYLAR / *Months*	Number Of Vessels	*Total Gross Tonnage*	/ With Pılot	*Sp1 Given*	Non Call In Vessels	*/ LOA Longer Than 200 M*	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/LNG	TCH	
January	3.162	57.030.096	1.418	3.133	1.763	414	33	456	89	205	6
February	3.356	58.927.424	1.474	3.323	1.979	432	38	503	101	164	10
March	3.701	67.075.167	1.651	3.667	2.202	485	23	523	89	210	7
April	3.749	63.427.204	1.589	3.715	2.198	440	51	507	76	195	17
May	3.779	63.497.429	1.596	3.743	2.182	436	48	495	75	217	12
June	3.679	61.801.905	1.618	3.616	2.047	446	97	502	69	230	12
July	3.720	66.838.550	1.619	3.670	2.248	500	65	504	73	215	10
August	3.831	67.353.403	1.641	3.782	2.326	495	63	465	74	193	14
September	3.720	64.558.861	1.548	3.684	2.295	487	69	484	59	199	13
October	3.920	69.597.756	1.666	3.870	2.364	528	69	523	62	251	11
November	3.734	65.062.504	1.554	3.689	2.263	485	54	518	57	236	14
December	3.684	67.752.383	1.633	3.651	2.204	517	51	561	57	244	13
Total	**44.035**	**772.922.682**	**19.007**	**43.543**	**26.071**	**5.665**	**661**	**6.041**	**881**	**2.559**	**139**

MARINE TOURISM

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

Place; GOCEK In Fethiye (12 Islands)

As from the 1970's, taking into consideration, firstly the contributions made to the Turkish economy by the yacht tourism and then by the other sea tourism elements, it has been decided to establish a "Maritime Tourism Working Group", administered by the Chairman of the Executive Committee of the Turkish Chamber of Shipping, also participated by the Chairmen of our Chamber's Professional Committees and Branches.

The Maritime Tourism Working Group established at the Turkish Chamber of Shipping began to perform its activities on 20 December 2000, after being approved by the Board of Directors of our Chamber. Maritime Tourism Working Group consists of the Chairmen of the Head Office, Antalya, Bodrum, Fethiye, İzmir and Marmaris Branches and also the Chairmen of All Kinds of Passenger Transportation, Yacht Administrations, Daily Pleasure Boat Administrations, Marina Administrations, Chairmen of the Professional Committees of Underwater and Water Sports Professional Committees, the Representative of the Cruise Tourism, Maritime Tourism Ankara Representative of the Board of Directors. Maritime Tourism Working Group represents actively the Maritime Tourism in the name of the Turkish Chamber of Shipping.

The most prominent success of the Maritime Tourism Working Group has become to define and to establish the concept of "Maritime Tourism" which has not been mentioned sufficienrtly in the Shipping Sector and also at various platforms and specially almost not mentioned at all in the public sector.

- **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.
Apart from the traditional wooden yachts we also provide others types of boat building in Turkey
For example Antalya has been announced as the 4th city in the world for Composit Boat Building in 2016
İstanbul Tuzla is the place where the Maltese Falcon has been built in 2008
Kocaeli Free Trade Zone and Bursa are also important centers.
As we mentioned the traditional Wooden yachts are built in Aegean area, such as Bodrum, Bozburun, well known designers such as Andrea Hoek, Ron Holland, Ken Freivo are building projects here. There are still well known craftsman for wooden boats who continue building wooden boats even in their back yards.

TABLE (59): MARINE TOURISM VESSELS (2016)

	Number of Enterprices	Number of Vessels	Number of Bed Cappacity
Turkish Flag Yacht with Tourism Administration Certificate	1.142	1.538	16.030
Foreign Flag Yacht with Tourism Administration Certificate	26	608	5.100
General total	**1.168**	**2.146**	**21.130**
	Number of Enterprices	**Number of Vessels**	**Number of Passenger**
Day Trip Boat with Tourism Administration Certificate	1.654	1.839	112.301
	Number of Enterprices	**Number of Vessels**	**Summer/Winter Cappacity**
Restaurant Boat with Tourism Administration Certificate	52	52	15.992 person /10.047 person

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.

Since the 60's we protect/ sustain the building of these traditional boats in many areas on our coasts.
In the 60's the sponge fisherman used to use the same boats for fishing purposes. The first blue cruises that were done by the Fisherman of Halicarnassos and his friends, the esteemed intellectuals of the time, went on cruises where there was no electricity no bathroom and kitchen

As you know we have the famous 'Blue Cruises' in our country. This is a concept that began in the 60's with our famous storyteller and philosopher / author 'Fisherman of Halicarnassos' Sailing with a crew on the turquoise waters of Turkey would be a memorable experience.
Together with 3 or 4 crew members, blue cruises are proven to be the most comfortable and joyful way to explore our bays.

And this is how it became now: Convenience and pleasure on the boat
They come in 3 different shapes: Gulets with her broad rounded stern, favorite of the blue cruise, ideal for relaxation
Tirhandils are traditional boat type with a single mast pointed stern and fairly large hull. Once, favorite of the sponge divers due to uncluttered space on deck
Mirror sterns are expecially favorite with the flat stern allowing space for two extra cabins at the rear.

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.

Five Blue Voyage Routes In Anatolia

Horizons drenched in a thousand shades of blue, hot golden beaches, the sound of the surf splashing against the broadside of the boat, and the sharp iodine smell of the sea—here are five summer routes in Anatolia.

Bodrum – Gökova

The most important stop on this route, which starts in the coves near Bodrum, is the island of Kara Ada. The island is known for its therapeutic hot water springs, and it is possible to have mud bath in its natural pools. Mersincik Harbor, in the Gulf of Gökova, is ideal for swimming—its waters are very clear. The coves of Büyük and Küçük Çatı present alternative options. Tuzla Cove, which cuts roughly three miles eastward into Koyun Point, resembles a lake, while Karacasöğüt is a well-protected cove surrounded by pine-forested hills. İngiliz Harbor is famous for its sunset. Sedir Island, one of the greatest spots on the route, is known for its deserted beaches. The island is peppered with the ruins of the ancient town of Kedreai. It is said that the Egyptian princess Cleopatra bathed in the small cove in the northwest of this olive tree-covered island. At dusk, the boats stop for the night in Akbük Harbor, whose sea is as clear as an aquarium. The next morning, after laying anchor in Çamaltı Cove and hiking over land for roughly half an hour, one reaches the ancient ruins of Keramos. Later, lunch is had at Çökertme Cove. After following a route that visits Orak Island, Çiftlik, and Bitez, the ships return to Bodrum.

The Blue Voyage can be taken as a day trip or with accommodation. The cabin charter tours range from three to eight days. Experts recommend one week as the ideal duration for a Blue Voyage.

Datça – Bozburun

The boats take off from Datça Harbor and follow the path of the coves buried like so many treasures in the peninsula. After a stop for breakfast, the boat moves on to the

Gulf of Hisarönü. Dişliceada Island, at the entrance of Bencik Harbor, conceals small beaches on its shores. Orhaniye, our first stop on the Bozburun Peninsula, shines like a blue bead amid lush green forests. The walls on the island located in the middle of the cove were used as watchtowers during the Byzantine era. Kızkumu, one of the most favored beaches in the region, is a shallow sandbar that stretches out to the sea like an extended tongue. Selimiye, which boats reach after a dance with blue and green, is a small fishermen's village filled with seafood restaurants. After Bozburun—the center of the peninsula—the boats pass by Simi Island and reach Bozukkale. There are the ruins of the ancient city of Loryma in this cove, which is surrounded by steep hills. The next stop is Serçe Harbor, which has many sunken ships off its shores. After here, optionally, a route that visits Çiftlik, Kadırga, and Turunç respectively can be followed.

All Blue Voyage vessels that hold permits to carry passengers for touristic purposes must comply to standards set by the Ministry of Cultur and Tourism. No voyages take place in weather and sea conditions seen as unfit by the Port Authorities, Coast Guard, and Meteorological Service.

Marmaris – Fethiye

Starting in Marmaris, which is one of the most important Blue Voyage centers in Anatolia, this route first stops by Ekincik Cove. İztuzu Beach—one of the most important habitats of the loggerhead (caretta caretta) sea turtle—is the port of entrance to Dalyan, which resembles a giant marine labyrinth. By boarding smaller boats here, you can go all the way out to Lake Köyceğiz. The Kaunus Rock Tombs, with their marvelous panorama, are among the places worth seeing in the area. Dişibilmez Point and Manastır Point are two important stops before Göcek. It is known that ships were built on Tersane ("Shipyard") Island, located off the shores of Göcek, during the Byzantine era. Scattered among the olive trees of the shore of this bowl-shaped island are numerous ruins of houses. After such a pleasant day, the boats stop in Göcek for the night. The next day, the boats set out to the Ölüdeniz (the Blue Lagoon), gliding on the Mediterranean like white swans. It is forbidden to lay anchor in Ölüdeniz, a lagoon that resembles a giant lake with its clear, tranquil waters. It is possible to moor off its shores and go to the beach via boat. On Gemiler ("Ships") Island in the Gulf of Fethiye, there are ruins of an ancient church from the Byzantine era.

Capacity ranges from eight to twenty-five on cabin charter tours.

Kaş – Göcek

This route, which has received great interest in recent years, joins two important Mediterranean harbors. The Yediburunlar region, which falls between the two places, is unaccommodating of overnight stays due to generally having choppy seas. The true privilege of this route is that it includes the area of Kekova, which can be considered the most beautiful place along the Antalya–Kaş route. Continuing off the shores of Üçağız, which is studded with the ruins of the ancient harbor disguised amid carob trees, the voyage enters a brand-new, dreamlike realm in the Sunken City: ancient avenues shimmering beneath clear, turquoise-colored waters; elegant

columns; ruins of buildings; stairs disappearing into the depths beneath; and fields of amphorae… The boats are floating above a mysterious Lycian town that is thought to have been plunged into the seas due to an earthquake in the second century BC.
The journey continues, passing by rock tombs, monks' cells, and tiny coves, until Simena. The first long leg of the journey from here has a view of Kastelorizo (Meis) Island.

Antalya – Finike

The coves on this route promise a lovely voyage along which natural and historical beauties are intertwined. Starting in Antalya, which is one of the most important centers of tourism in the Mediterranean, the journey stops by a modern Anatolian marina in Kemer. The ancient Lycian town of Phaselis is reached right after Asar Point. Established as a triple-harbored seaside town by sailors from Rhodes in the seventh century BC, Phaselis was famed in Roman times—its golden age—for its high-quality perfumes. As you wander the ancient streets connecting the harbors, your senses are delighted by a combination of the sound of the surf and the scent of the pines. Just a little ahead are Çıralı, Olimpos Beach, and Yanartaş, which are quite memorably beautiful. The name of the piece of land stretching northward from Taşlık Point is Çavuş Harbor. To the west of the bay, which is surrounded by green hills, there is a beach, and immediately behind it a plain. Finike, a protected harbor, is four miles northeast of Bunda Point.
Blue Voyage tours in Anatolia start in May and run through the end of October. Demand is at its most concentrated in the high season of July and August.

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 (60): Marine Tourisim Facility with Tourism Administration Certificate (2016)				
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/İSTANBU L	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/BALIKESİ R	210	100
14-Yalova Yacht Port SETUR	Main Yacht Port	YALOVA	240	80

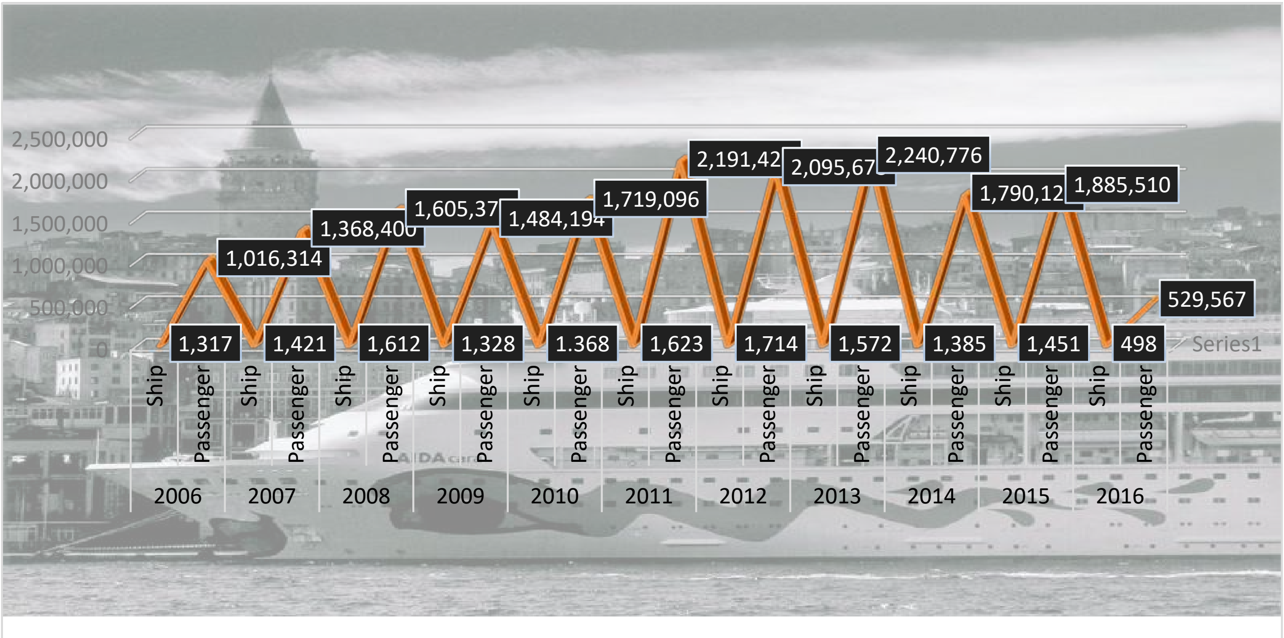
15-Sığacık Yacht Port TEOS Marina	5 Anchored Yacht Port	Seferihisar/İZMİR	400	80
16-Skopea Marina	Dock	Göcek/MUĞLA	80	-
TOTAL			**4239**	**1508**
GRAND TOTAL			**57477**	
Location of Documents Yacht Tourism Investment				
1-Marmaris Marina	Yacht Slipway Facility	Marmaris/MUĞLA	-	200
2-Yacht Marin	Yacht 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 03.12.2015				

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.

World Cruise Companies Arrival-Departure Port of Istanbul (Turn-Around Port) as reported by declaring Al Development Program.

GRAPH (61): Statistics of Cruises and Passengers Arrived at Turkish Ports Between 2006-2016



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 (61): Number of Transit Passengers Coming by Cruise Ships (Source: Minister of Transport, Maritime Affairs and Com.)

LİMAN	2010		2011		2012		2013		2014		2015		2016	
ADI	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER
Alanya	2	1.071	22	25.743	22	25.743	53	40.843	23	18.556	34	22.332	13	9.271
Antalya	41	103.859	64	127.250	55	159.430	64	163.575	58	175.778	52	168.538	16	45.979
Anamur	0	0	4	351	1	63	0	0	0	0	0	0	0	0
Bartın	4	555	2	208	9	882	15	2.071	20	2.824	8	954	2	171
Bozcada											12	62.050	46	61.315
Bodrum	89	31.700	82	46.031	131	52.832	114	28.546	78	32.879	90	14.970	3	1.336
Çanakkale	17	7.670	23	4.371	25	4.184	36	7.467	42	9.999	73	22.494	28	6.394
Çeşme	16	9247	1	89	25	4.787	54	62.741	57	62.115	41	40.772	68	57.987
Datca	3	778	0	0	0	0	0	0	0	0	0	0	0	0
Dikili	26	15.401	34	17.485	24	4.865	21	7.655	32	7.914	41	8.317	17	3.998
Fethiye	5	879	5	1.975	11	1.969	4	1.067	8	1.938	10	2.824	2	338
Göcek	16	2.274	7	1.216	6	1.038	2	252	3	380	6	883	2	162
Güllük	1	279	3	1.692	7	1.079	7	476	3	329	3	347	3	323
İskenderu	1	106	5	1.308	0	0	0	0	0	0	0	0	0	0
İstanbul	342	508.246	420	627.897	382	596.027	381	689.417	317	518.935	345	595.880	56	43.543
İzmir	159	378.266	262	493.533	288	552.764	190	486.493	124	257.233	114	241.716	24	27.619
Kaş	8	1.317	3	507	7	1.018	3	1.152	3	625	11	4.122	4	1.057
Kemer	6	602	0	0	0	0	0	0	0	0	0	0	0	0
Kuşadası	517	493.911	568	662.456	464	564.317	428	577.685	448	556.745	506	567.315	271	349.781
Marmaris	84	146.531	84	170.021	88	110.279	112	152.685	82	107.724	83	129.126	22	15.628
Mersin	1	106	3	416	2	774	3	1.381	0	0	2	1.597	3	2.505
Mudanya	1	24	5	922	0	0	2	414	0	0	2	655	1	54
Samsun	4	825	3	208	7	1.190	12	1.281	17	1.558	5	550	2	171
Sinop	7	7.098	9	4.088	10	3.708	16	7.460	30	17.518	5	1.361	2	174
Taşucu	2	201	4	805	4	709	0		3	937	1	286	3	226
Trabzon	14	7.952	13	6.267	18	8.015	24	8.115	37	16.138	10	2.281	2	1
Tuzla	2	0	0	0	0	0	1	0	0	0	0	0	0	0
Yalova	-	-	-	-	1	0	0	0	0	0	2	0	0	0
TOPLAM	1.368	1.719.098	1.623	2.191.420	1.587	2.095.673	1.572	2.240.776	1385	1.790.125	1.456	1.889.370	590	628.033

TABLE(62): Statistics of Cruises and Passengers Arrived at Turkish Ports (2014)

Harbour Masters	CRUISE SHIP				CRUISE PASSENGER			
	CRUISE SHIP	PASSENGER SHIP	OTHERS SHIP	TOTAL	IN COMING	OUT GOING	TRANSIT	TOTAL
ALANYA	20	3	0	23	37	32	18.487	18.556
ANTALYA	19	39	0	58	83.821	84.318	7.639	175.778
BARTIN	17	3	0	20	1	1	2.822	2.824
BODRUM	61	17	0	78	139	193	32.547	32.879
ÇANAKKALE	32	10	0	42	5	18	9.976	9.999
ÇEŞME	51	6	0	57	24.962	25.419	11.734	62.115
DİKİLİ	29	3	0	32	196	181	7.537	7.914
FETHİYE	8	0	0	8	2	0	1.936	1.938
GÖCEK	3	0	0	3	0	0	380	380
GÜLLÜK	1	2	0	3	0	0	329	329
İSTANBUL	239	78	0	317	74.941	74.822	369.172	518.935
İZMİR	86	38	0	124	4.238	3.951	249.044	257.233
KAŞ	2	1	0	3	0	0	625	625
KUŞADASI	388	60	0	448	13.720	24.705	518.320	556.745
MARMARİS	66	16	0	82	29.419	28.034	50.271	107.724
SAMSUN	13	4	0	17	43	0	1.515	1.558
SİNOP	26	4	0	30	608	2	16.908	17.518
TAŞUCU	2	1	0	3	0	0	937	937
TRABZON	33	4	0	37	24	19	16.095	16.138
TOTAL	1.096	289	0	1.385	232.156	241.695	1.316.274	1.790.125

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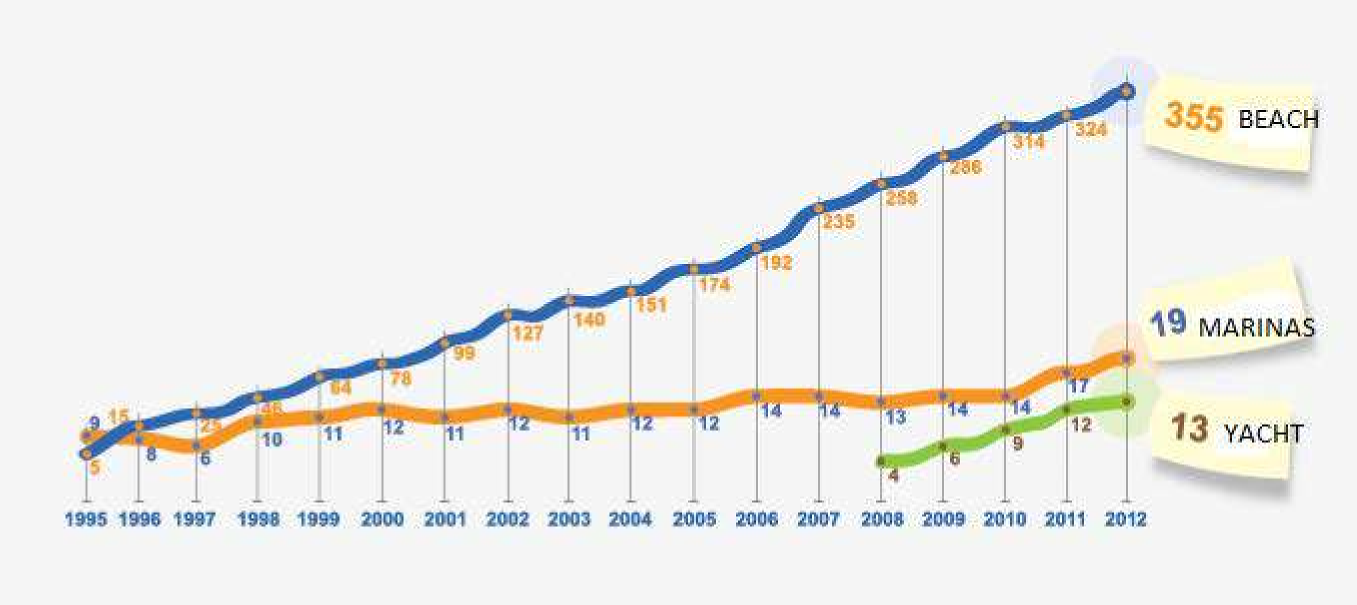
Blue Flag Compaign

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 (62): Number of Turkish Beaches, Marinas and Yachtes with Blue Flags by Years



Source: TURÇEV

TABLE 63 : Number of Internatioanal Blue Flags by Years 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.
Above the water and diving off the coast of our country engaged in tourism business we have around 800 certified and authorized

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.

CHAPTER VII

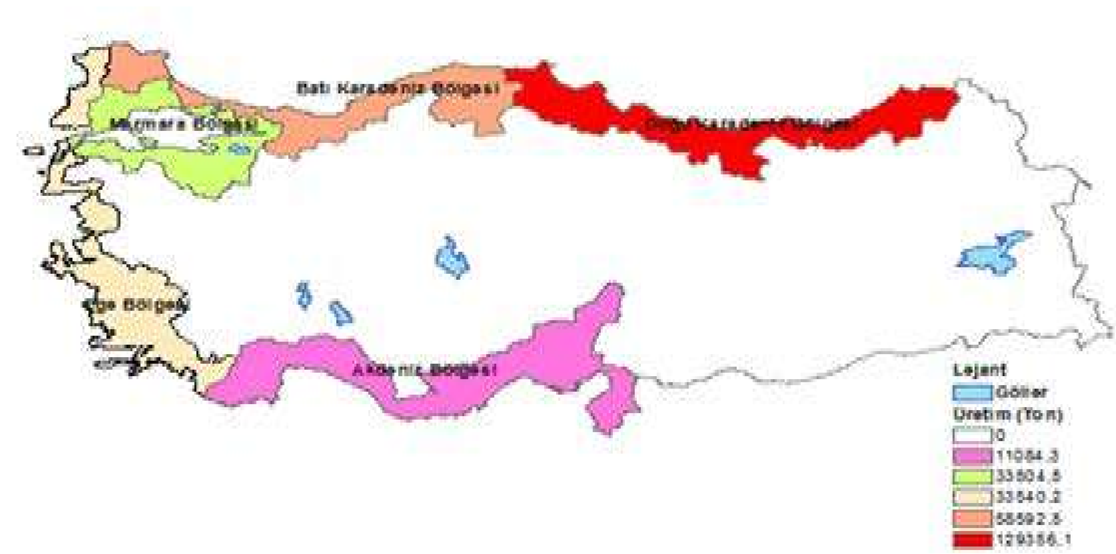
TURKISH FISHING SECTOR

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 (63): Quantitiy of Captured Sea Product (2016)



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 600.000 tons.

In 2014;

Fishery production decreased by 11.6% in 2014

Fishery production decreased by 11.6% in 2014 with respect to the previous year and occured as 537 thousand 345 tonnes. The total fishery production was composed of sea fish by 43%, other sea products by 6.5%, inland water products by 6.7% and aquaculture products by 43.8%.

In 2014, while capture of fishery products was decreasing by 19.2%, aquaculture increased by 0.7%

While the production made by capture was 302 thousand 212 tonnes, aquaculture production occurred as 235 thousand 133 tonnes. While the capture of marine production decreasing by 21.5%, capture of inland water production increased by 3% with respect to the previous year.

46% of the amount of aquaculture production took place at the inland waters and 54% at the seas.

Within all the production of marine products by capture, East Black Sea region was the first by the ratio of 48.6%. The regions West Black Sea by 22%, Aegean and Marmara by 12.6% and Mediterranean by 4.2% followed this region.

TABLE (64): Fishery Statistics by Years

	Sea Products **(Ton** - Tonnes)	Aquaculture Production **(Ton** - Tonnes)	Freshwater Products **(Ton** - Tonnes)
2003	463 074	79 943	44 698
2004	504 897	94 010	45 585
2005	380 381	118 277	46 115
2006	488 966	128 943	44 082
2007	589 129	139 873	43 321
2008	453 113	152 186	41 011
2009	425 046	158 729	39 187
2010	445 680	167 141	40 259
2011	477 658	188 790	37 097
2012	396 322	212 410	36 120
2013	339 047	233 394	35 074
2014	266 078	235 133	36 134
2015	397 731	240 334	34 176

Source: For aquaculture production and freshwater products, Ministry of Food, Agriculture and Livestock.

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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%.

- TABLE (65):Aquaculture Production

Ton - Tonnes

Type of fish	2010	2011	2012	2013	2014	2015
Total	**167 141,0**	**188 790,0**	**212 410,0**	**233 393,9**	**235 133,0**	**240 334,0**
Inland water						
Trout (Rainbow trout)	78 165,0	100 239,0	111 335,0	122 873,3	107 533,0	100 411,0
Trout (Salmo sp.)*	-	-	-	-	450,0	755,0
Carp	403,0	207,0	222,0	145,5	157,0	206,0
Sturgeon*	-	-	-	-	17,0	28,0
Tilapia*	-	-	-	-	32,0	12,0
Frog*	-	-	-	-	50,0	43,0
Marine water						
Trout (Rainbow trout)	7 079,0	7 697,0	3 234,0	5 186,2	4 812,0	6 187,0
Trout (Salmo sp.)*	-	-	-	-	798,0	685,0
Sea bream	28 157,0	32 187,0	30 743,0	35 701,1	41 873,0	51 844,0
Sea bass	50 796,0	47 013,0	65 512,0	67 912,5	74 653,0	75 164,0
Common seabream*	-	-	-	-	106,0	143,0
Corb*	-	-	-	-	39,0	61,0
Meagre*	-	-	-	-	3 281,0	2 801,0
Dentex*	-	-	-	-	113,0	132,0

Sharpsnout seabream*		-	-	-	-	8,0	59,0
Blue spatled bream*	-	-	-	-	75,0	90,0	
Bluefin tuna*	-	-	-	-	1 136,0	1 710,0	
Mussel	340,0	5,0	-	-	-	3,0	
Other	2 201,0	1 442,0	1 364,0	1 575,3	-	-	

Increase in inland water products production 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%.

Fishing Fleet and Catching Water Products

Our fleet is using high-tech equipments and our fishing reserves are more than our yearly fishing capacity.
At present, we have 18.942 (2015 year) registered fishing boats.
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.
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

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

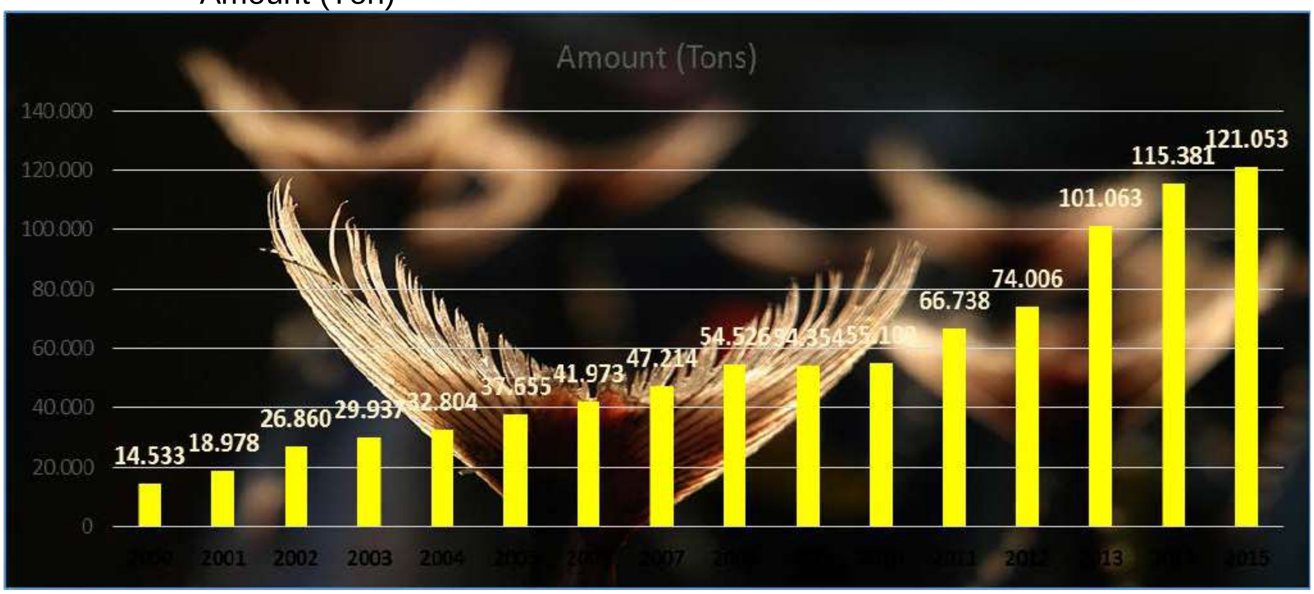
In the previous years, major part of Turkish export water products consisted of frozen fish; but currently it consists of canned fish. Export of canned-fish, is mostly realized to Germany, England, Belgium, Spain, Italy and France. Export to Far East is also developing and some of the main markets are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

26,860 in 2002 (tons), 74,006 In 2012 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.

In 2015, as regards our country’s exports of fish products, Japan has the biggest share, being followed by Holland, Greece, Italy, Spain, Germany, 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 the whole world.
The amount of exports has been increased 276% in the last eleven years. Exports reached 121.053 tons in 2015; although it was 26860 tons in the year 2002.

GRAPH (64): Exports of Water Production (2000-2015)
Amount (Ton)



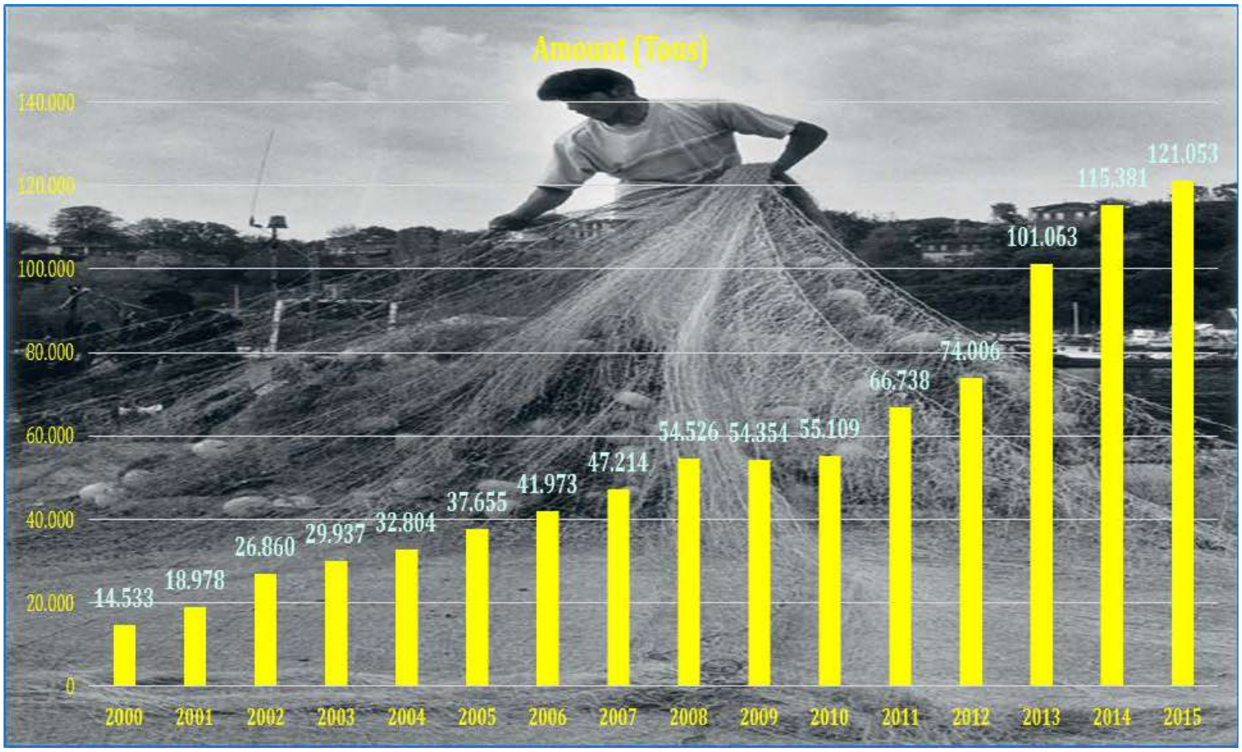
◈ **Imports**

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)

22,532 in 2002 (tons), 77,551 In 2014 the exports (tons), reaching the last eleven years, according to the amount of exports increased nearly 100 % has been achieved.

As regards 2015, in our country's imports of fish products Norway has the biggest share, being followed by France, India, USA, Morocco , Georgia and Greece

GRAPH (65):Imports of Water Products 2000-2014 (Amount (Tonnes)



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.

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 the Turkish Maritime Shipping's reaching a high level so as to create Shipping Policies which will help to increase the economic 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 9 faculties of maritime studies (including one in The Northern Cyprus Turkish Republic) which provides education at Bachelor's level (four years), 10 Anatolian High Schools and 17 Anatolian Technical High Schools.

Faculties of Maritime Studies

No	Üniversite	Fakülte
1	DOKUZ EYLÜL ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
2	GİRNE ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
3	İSTANBUL TEKNİK ÜNİVERSİTESİ	KKTC EĞİTİM ARAŞTIRMA YERLEŞKELERİ
4	İSTANBUL TEKNİK ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
5	KTÜ SÜRMENE	DENİZ BİLİMLERİ FAKÜLTESİ
6	ORDU ÜNİVERSİTESİ	DENİZ BİLİMLERİ FAKÜLTESİ
7	PİRİ REİS ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
8	YILDIZ TEKNİK ÜNİVERSİTESİ	GEMİ İNŞAATI VE DENİZCİLİK FAKÜLTESİ
9	İSTANBUL ÜNİVERSİTESİ	MÜHENDİSLİK FAKÜLTESİ DENİZ ULAŞTIRMA İŞLETME MÜHENDİSLİĞİ

Anatolian Maritime High Schools

No	Üniversite	Kurum Adı
1	EGE ÜNİVERSİTESİ	URLA DENİZCİLİK MESLEK YÜKSEKOKULU
2	GİRNE AMERİKAN ÜNİVERSİTESİ	DENİZ VE ULAŞTIRMA YÜKSEKOKULU
3	GİRNE ÜNİVERSİTESİ	DENİZCİLİK YÜKSEKOKULU
4	GİRNE ÜNİVERSİTESİ (YAKINDOĞU ÜNİVERSİTESİ)	DENİZCİLİK MESLEK YÜKSEKOKULU
5	MUĞLA SITKI KOÇMAN ÜNİVERSİTESİ	BODRUM DENİZCİLİK MESLEK YÜKSEKOKULU
6	NİŞANTAŞI ÜNİVERSİTESİ	MESLEK YÜKSEKOKULU
7	PİRİ REİS ÜNİVERSİTESİ	MESLEK YÜKSEKOKULU
9	RECEP TAYYİP ERDOĞAN ÜNİVERSİTESİ	TURGUT KIRAN DENİZCİLİK YÜKSEKOKULU
10	ORDU ÜNİVERSİTESİ	FATSA MESLEK YÜKSEKOKULU

Anatolian Maritime Technical High Schools

No	İl	İlçe	Kurum Adı
1	ANTALYA	KONYAALTI	FETTAH TAMİNCE MESLEKİ VE TEKNİK ANADOLU LİSESİ
2	ANTALYA	MANAVGAT	MANAVGAT TİCARET VE SANAYİ ODASI MESLEKİ VE TEKNİK ANADOLU LİSESİ
3	İZMİR	ÇEŞME	ULUSOY DENİZCİLİK TEKNOLOJİSİ MESLEKİ VE TEKNİK ANADOLU LİSESİ
4	GİRESUN	TİREBOLU	TİREBOLU PİRİ REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
5	İSTANBUL	BEŞİKTAŞ	ZİYA KALKAVAN MESLEKİ VE TEKNİK ANADOLU LİSESİ
6	İSTANBUL	BEYKOZ	BEYKOZ BARBAROS HAYRETTİN PAŞA MESLEKİ VE TEKNİK ANADOLU LİSESİ
7	İSTANBUL	PENDİK	PENDİK BARBAROS HAYRETTİN PAŞA MESLEKİ VE TEKNİK ANADOLU LİSESİ
8	İSTANBUL	TUZLA	PİRİ REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
9	İSTANBUL	PENDİK	ERYETİŞ REİS DENİZCİLİK MESLEK LİSESİ
10	İSTANBUL	ÜSKÜDAR	HACI RAHİME ULUSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ
11	İZMİR		ÖZEL ALBATROS MESLEKİ TEKNİK DENİZCİLİK ANADOLU LİSESİ
12	KOCAELİ	GÖLCÜK	GÖLCÜK MESLEKİ VE TEKNİK ANADOLU LİSESİ
13	MERSİN	TAŞUCU	PROFESÖR DOKTOR DURMUŞ TEZCAN MESLEKİ VE TEKNİK ANADOLU LİSESİ
14	MUĞLA	BODRUM	BODRUM MESLEKİ VE TEKNİK ANADOLU LİSESİ
15	MUĞLA	KÖYCEĞİZ	KÖYCEĞİZ MESLEKİ VE TEKNİK ANADOLU LİSESİ
16	MUĞLA	MARMARİS	75. YIL MESLEKİ VE TEKNİK ANADOLU LİSESİ
17	SAMSUN	TEKKEKÖY	NEDİME SERAP ULUSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ

Special maritime Training Courses

No	İl	Kurum Adı
1	İSTANBUL	ÖZEL AKTEN DENİZCİLİK EĞİTİM MERKEZİ
2	FETHİYE	ÖZEL ALBATROS DENİZCİLİK VE YAT KAPTANLIĞI EĞİTİM MERKEZİ
3	İSTANBUL	ÖZEL ATILIM DENİZCİLİK VE GEMİADAMLARI KURSU
4	İSTANBUL	ÖZEL AVRUPA DENİZCİLİK GEMİADAMLARI YETİŞTİRME KURSU
5	İSTANBUL	ÖZEL BEYAZ ERGUVAN DENİZCİLİK VE GEMİADAMLARI KURSU
6	İSTANBUL	ÖZEL BİLİMSEL DENİZCİLİK GEMİADAMLARI YETİŞTİRME KURSU KADIKÖY ŞUBESİ
7	İSTANBUL	ÖZEL BOĞAZİÇİ DENİZCİLİK VE GEMİADAMLARI YETİŞTİRME KURSU
8	MERSİN	ÖZEL BONCUK DENİZCİLİK VE GEMİADAMLARI KURSU
9	SAMSUN	ÖZEL ÇAPA DENİZCİLİK VE GEMİADAMLARI KURSU
10	ANTALYA	ÖZEL DEM DENİZCİLİK KURSU
11	MERSİN	ÖZEL DOĞA DENİZCİLİK VE GEMİADAMLARI KURSU
12	İZMİR	ÖZEL DÖNENCE DENİZCİLİK VE GEMİADAMLARI KURSU
13	İSTANBUL	ÖZEL EKOL DENİZCİLİK EĞİTİM EĞİTİM MERKEZİ
14	TUZLA	ÖZEL ERYETİŞ REİS DENİZCİLİK VE GEMİADAMLARI YETİŞTİRME KURSU
15	FETHİYE	ÖZEL FETHİYE DENİZCİLİK KURSU
16	ÇANAKKALE	ÖZEL GÜLAY DENİZCİLİK EĞİTİM MERKEZİ
17	GÜLLÜK	ÖZEL GÜLLÜK GEMİADAMLARI EĞİTİM KURSU
18	KOCAELİ	ÖZEL İNCİ DENİZCİLİK VE GEMİADAMLARI YETİŞTİRME KURSU
19	İZMİR	ÖZEL İZMİR PUSULA DENİZCİLİK VE GEMİADAMLARI KURSU
19	SAMSUN	ÖZEL KAPTAN DENİZCİLİK VE GEMİADAMLARI KURSU
20	BODRUM	ÖZEL MARİNA DRAGOS BODRUM DENİZCİLİK EĞİTİM KURSU
21	MARMARİS	ÖZEL MARMARİS DENİZCİLİK EĞİTİM KURSU
22	FİNİKE	ÖZEL MARTI DENİZCİLİK EĞİTİM MERKEZİ
23	İSTANBUL	ÖZEL MERCAN DENİZCİLİK VE GEMİADAMI KURSU
24	MERSİN	ÖZEL MODERN DENİZCİLİK VE GEMİADAMLARI YETİŞTİRME KURSU

25	ANKARA	ÖZEL OYAK SAVUNMA VE GÜVENLİK ANONİM ŞİRKETİ
26	RİZE	ÖZEL RİZE SAHİL DENİZCİLİK GEMİADAMLARI KURSU
27	SAMSUN	ÖZEL SAMSUN DENİZCİLİK VE GEMİADAMLARI KURSU
28	TRABZON	ÖZEL SANCAK DENİZCİLİK EĞİTİM MERKEZİ
29	TUZLA	ÖZEL TURGUT REİS GEMİADAMLARI KURSU
30	GÖÇEK	ÖZEL YENİ VİRA DENİZCİLİK YELKEN VE GEMİADAMLARI KURSU

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.***

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