2014
MARITIME SECTOR REPORT

İSTANBUL 2015

İstanbul & Marmara, Agean, Mediterranean, Blacksea Regions

TURKISH CHAMBER OF SHIPPING

TURKISH CHAMBER OF SHIPPING

İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

MARITIME SECTOR REPORT
2014

İ S T A N B U L – 2015

FOREWORD

The "TURKISH SHIPPING SECTOR REPORT 2014" 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 31.12.2014 and is presented to our members, Turkish and foreign institutions.

The Report mainly contains eighth 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 2014. 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 2014 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 IT 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 Harbor Association Ltd. (TYHA), International Council of Marine Industry Associations (ICOMIA), European Boating Association (EBA), TACCI (Turkish American Chamber of Commerce and Industry).

◆ ITS PUBLICATIONS

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

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CHAPTER I

THE DEVELOPMENT OF TURKISH SHIPPING

A Close Investigation of the Turkish Merchant Fleet

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

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

Number and tonnage evaluations have been shown totally as of 31 December 2014.

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 14 shows that, Turkish merchant fleet consists of 591 ships. The examination of the table shows that 285 ships (6.5 million DWT) have been acquired by importation and 306 ships (1.6 million DWT) have been built in Turkey.

Distribution of 591 ships by their types ; 36,53 % dry cargo ships, 14,89 % bulk carriers, 9,98 % chemical tankers, 8,97 % containers and 3,89 % oil tankers, 25,74 % other types of ships.

Distribution of the fleet by DWT (8,1 Million) ; 51,03 % bulk carriers, 14.63 % dry cargo ships, 12.41 % oil tankers, 10,27 % containers and 11,66 % other types of ships.

By DWT, 8,3 % of our fleet is registered in National Ship Registry, 91,7 % of fleet is registered in International Ship Registry. By GRT, 15,44 % of our fleet is registered in National Ship Registry, 84,56 % of the fleet is registered in International Ship Registry. (Table 2)

The fleet registered in International Ship Registry (7,5 Million Dwt) is composed of bulk carriers (49.6 %), dry cargo vessels (15.3 %), oil tankers (13.4 %), container ships (9.14 %), chemical tankers (5.8 %) and other types of ships (6.7 %). (Table 2)

Table 15 shows Turkish merchant fleet which consists of 591 ships. 12.6 % of total fleet (75 ships) registered in National Ship Registry and 87.4 % of total fleet (516 ships) registered in International Ship Registry.

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

SHIP TYPES	COUNT				DWT				GRT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
DRY CARGO	55	161	216	36,53	420.825	777.734	1.198.559	14,63	292.606	493.300	785.906	12,99
BULK CARRIERS	81	7	88	14,89	4.018.348	161.879	4.180.227	51,03	2.289.606	102.027	2.391.633	39,52
CONTAINERS	32	21	53	8,97	594.861	246.675	841.536	10,27	479.224	184.329	663.553	10,96
DRY CARGO/CONTAINERS	4	12	16	2,71	18.288	97.824	116.112	1,42	12.771	68.894	81.665	1,35
CHEMICAL TANKERS	22	37	59	9,98	197.236	242.892	440.128	5,37	124.272	162.204	286.476	4,73
LPG TANKERS	6	0	6	1,02	30.789	0	30.789	0,38	29.336	0	29.336	0,48
ASPHALT TANKERS	1	2	3	0,51	2.770	39.936	42.706	0,52	1.900	31.348	33.248	0,55
RO-RO SHIPS	23	0	23	3,89	225.828	0	225.828	2,76	528.136	0	528.136	8,73
RO-RO/PASSERGER	9	3	12	2,03	18.471	1.208	19.679	0,24	42.712	4.844	47.556	0,79
FERRY BOATS	7	3	10	1,69	3.983	3.988	7.971	0,10	37.566	4.253	41.819	0,69
TRAIN FERRIES	0	6	6	1,02	0	1.660	1.660	0,02	0	131.888	131.888	2,18
PASSENGER AND CARGO SHIPS	4	6	10	1,69	6.866	3.447	10.313	0,13	35.404	20.892	56.296	0,93
FISHING BOOT	1	1	2	0,34	569	0	569	0,01	1.407	3.566	4.973	0,08
SCİENTIFIC RESEARCH VESSEL	2	1	3	0,51	0	4.200	4.200	0,05	6.734	2.569	9.303	0,15
HARBOUR FERRIES	2	0	2	0,34	0	0	0	0,00	79.136	0	79.136	1,31
HARBOUR CAR FERRIES	0	26	26	4,40	0	21.961	21.961	0,27	0	32.583	32.583	0,54
TUGS	3	0	3	0,51	2.028	0	2.028	0,02	4.142	0	4.142	0,07
SERVICE SHIPS	21	7	28	4,74	24.051	0	24.051	0,29	266.944	20.021	286.965	4,74
OTHERS	1	0	1	0,17	0	0	0	0,00	1.333	0	1.333	0,02
OIL TANKERS	10	13	23	3,89	971.775	44.303	1.016.078	12,41	513.724	27.223	540.947	8,94
TRAIN FERRIES/RO-RO	1	0	1	0,17	6.266	0	6.266	0,08	15.195	0	15.195	0,25
TOTAL:	**285**	**306**	**591**	**100,00**	**6.542.954**	**1.647.707**	**8.190.661**	**100,00**	**4.762.148**	**1.289.941**	**6.052.089**	**100,00**

Source: Turkish Chamber of Shipping -2015

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

	Count				DWT				GRT			
Ship Types	**National Reg.**	**Inter. Reg.**	**Total**	**%**	**National Reg.**	**Inter. Reg.**	**Total**	**%**	**National Reg.**	**Inter. Reg.**	**Total**	**%**
DRY CARGO	12	204	216	36,53	44.892	1.153.667	1.198.559	14,63	28.925	756.981	785.906	12,99
BULK CARRIERS	11	77	88	14,89	456.118	3.724.109	4.180.227	51,03	262.689	2.128.944	2.391.633	39,52
CONTAINERS	7	46	53	8,97	155.194	686.341	841.535	10,27	125.422	538.131	663.553	10,96
DRY CARGO/CONTAINERS	1	15	16	2,71	2.356	113.756	116.112	1,42	1.720	79.945	81.665	1,35
CHEMICAL TANKERS	1	58	59	9,98	1.638	438.490	440.128	5,37	1.082	285.394	286.476	4,73
LPG TANKERS	0	6	6	1,02	0	30.789	30.789	0,38	0	29.336	29.336	0,48
ASPHALT TANKERS	1	2	3	0,51	2.770	39.936	42.706	0,52	1.900	31.348	33.248	0,55
RO-RO SHIPS	0	23	23	3,89	0	225.828	225.828	2,76	0	528.136	528.136	8,73
RO-RO/PASSERGER	0	12	12	2,03	0	19.679	19.679	0,24	0	47.555	47.555	0,79
FERRY BOAT	0	10	10	1,69	0	7.971	7.971	0,1	0	41.819	41.819	0,69
TRAIN FERRIES	6	0	6	1,02	1.660	0	1.660	0,02	131.888	0	131.888	2,18
PASSENGER AND CARGO SHIPS	5	5	10	1,69	7.297	3.016	10.313	0,13	37.022	19.274	56.296	0,93
FISHING BOOT	0	2	2	0,34	0	569	569	0,01	0	4.973	4.973	0,08
SCİENTIFIC RESEARCH VESSEL	0	3	3	0,51	0	4.200	4.200	0,05	0	9.303	9.303	0,15
HARBOUR FERRIES	1	1	2	0,34	0	0	0	0	78.093	1.043	79.136	1,31
HARBOUR CAR FERRIES	2	24	26	4,4	2.755	19.206	21.961	0,27	2.673	29.910	32.583	0,54
TUGS	1	2	3	0,51	0	2.028	2.028	0,02	1.565	2.577	4.142	0,07
SERVICE SHIPS	24	4	28	4,74	4.277	19.774	24.051	0,29	256.909	30.056	286.965	4,74
OTHERS	1	0	1	0,17	0	0	0	0	1.333	0	1.333	0,02
OIL TANKERS	2	21	23	3,89	7.069	1.009.010	1.016.079	12,41	3.797	537.150	540.947	8,94
TRAIN FERRIES/RO-RO	0	1	1	0,17	0	6.266	6.266	0,08	0	15.195	15.195	0,25
Total :	**75**	**516**	**591**	**100**	**686.026**	**7.504.635**	**8.190.661**	**100**	**935.018**	**5.117.070**	**6.052.088**	**100**

Source : Turkish Chamber of Shipping -2015

The majority of the fleet registered in National Ship Registry (686.026 DWT) is composed of bulk carriers (66.4 %), container (22.6 %), dry cargo ships (6.53 %) and other types of ships (30,1 %).

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

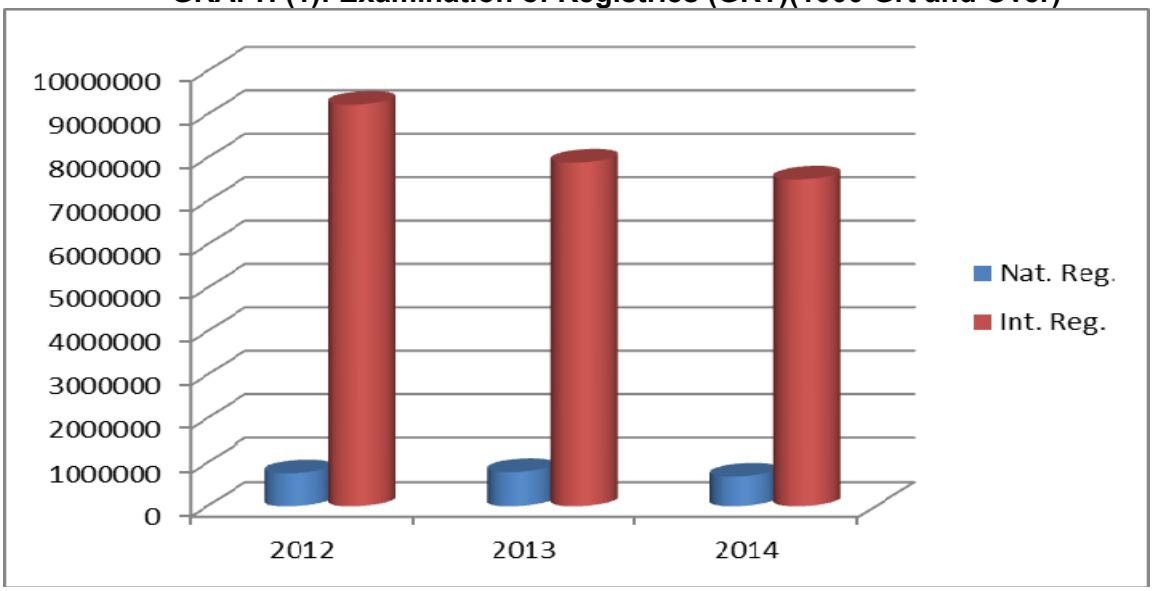


Table (3) Examination of Registries (Dwt) 2012-2013-2014

	2012 DWT			2013 DWT			2014 DWT		
SHIP TYPES	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total
DRY CARGO	64.610	1.340.762	1.405.372	76.521	1.220.040	1.296.561	44.892	1.153.667	1.198.559
BULK CARRIERS	415.831	4.697.581	5.113.412	444.930	3.907.485	4.352.415	456.118	3.724.109	4.180.227
CONTAINERS	185.205	642.923	828.128	194.525	595.841	790.366	155.194	686.341	841.535
DRY CARGO/CONTAINERS	2.356	141.994	144.350	2.356	132.664	135.020	2.356	113.756	116.112
CONTAINER / RO-RO	0	0	0	0	0	0	0	0	0
OIL TANKERS	39.937	1.319.335	1.359.272	23.757	1.167.113	1.190.870	7.069	1.009.010	1.016.079
CHEMICAL TANKERS	27.911	703.783	731.694	24.701	508.778	533.479	1.638	438.490	440.128
PRODUCT TANKERS	0	0	0	0	0	0	0	0	0
LPG TANKERS	0	35.029	35.029	0	35.029	35.029	0	30.789	30.789
ASPHALT TANKERS	2.770	0	2.770	2.770	0	2.770	2.770	39.936	42.706
RO-RO SHIPS	0	237.697	237.697	0	217.509	217.509	0	225.828	225.828
RO-RO/PASSERGER	0	29.789	29.789	0	29.342	29.342	0	19.679	19.679
FERRY BOATS	0	6.832	6.832	0	7.870	7.870	0	7.971	7.971
TRAIN FERRIES	6.668	0	6.668	6.668	0	6.668	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	9.800	5.742	15.542	9.800	5.742	15.542	7.297	3.016	10.313
FISHING BOOT	0	568	568	0	568	568	0	569	569
SCİENTIFIC RESEARCH VESSEL	0	0	0	0	16.897	16.897	0	4.200	4.200
HARBOUR FERRIES	0	0	0	0	0	0	0	0	0
HARBOUR CAR FERRIES	3.093	20.893	23.986	3.093	20.893	23.986	2.755	19.206	21.961
TUGS	1.394	1.049	2.443	1.394	2.056	3.450	0	2.028	2.028
SERVICE SHIPS	0	36.671	36.671	0	19.774	19.774	4.277	19.774	24.051
Total :	**759.575**	**9.226.914**	**9.986.489**	**790.515**	**7.893.867**	**8.684.382**	**686.026**	**7.504.635**	**8.190.661**

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 Grt and above comprises of 591 ships. The average age of these ships is 24 as of 31.12.2014.
The average age of dry cargo ships is 24 which consists of 14,6 % of the fleet. The average age of bulk carriers is 12 which consists of 51.0 % of the fleet. The average age of container is 13 and chemical tankers is 13 which consists of 15.6 % of the general fleet. The average age of oil tankers are 15 which consists of 12.4 % of the fleet.

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

Ship Types	Number	Tonnage (DWT)	Tonnage (GRT)	Ave. Age
DRY CARGO	216	1.198.559	785.906	24
BULK CARRIERS	88	4.180.227	2.391.633	12
CONTAINERS	53	841.535	663.553	13
DRY CARGO/CONTAINERS	16	116.112	81.665	11
CHEMICAL TANKERS	59	440.128	286.476	13
LPG TANKERS	6	30.789	29.336	22
ASPHALT TANKERS	3	42.706	33.248	11
RO-RO SHIPS	23	225.828	528.136	15
RO-RO/PASSERGER	12	19.679	47.555	21
FERRY BOATS	10	7.971	41.819	15
TRAIN FERRIES	6	1.660	131.888	41
PASSENGER AND CARGO SHIPS	10	10.313	56.297	26
FISHING BOOT	2	569	4.973	21
SCİENTIFIC RESEARCH VESSEL	3	4.200	9.303	15
HARBOUR FERRIES	2	0	79.136	58
HARBOUR CAR FERRIES	26	21.961	32.583	24
TUGS	3	2.028	4.142	36
SERVICE SHIPS	28	24.051	286.965	40
OTHERS	1	0	1.333	34
OIL TANKERS	23	1.016.079	540.947	15
TRAIN FERRIES/RO-RO	1	6.266	15.195	36
Total :	591	8.190.660	6.052.089	23,95

Source:Turkish Cahmber of Shipping - 2015

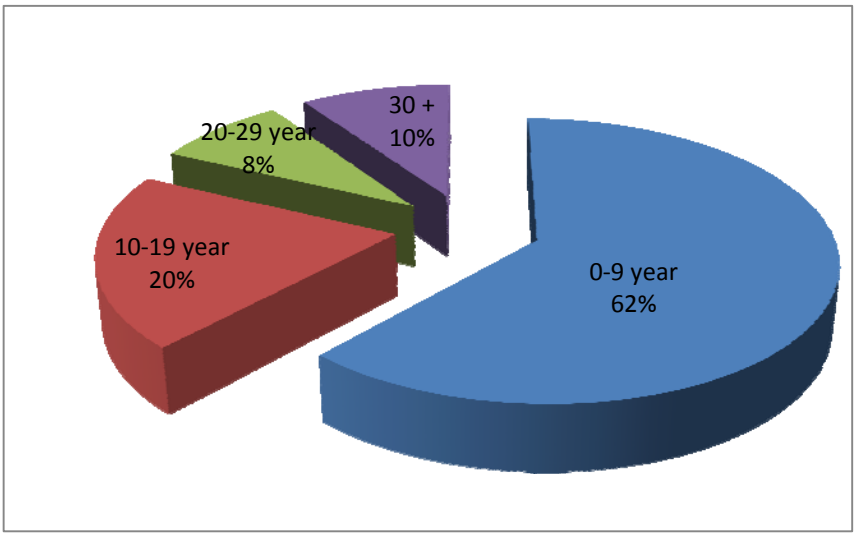
Table 5 shows Turkish Merchant Fleet by age and tonnage ranges. Turkish Merchant Fleet consists of 591 ships of 8.190.661 DWT.

- 203 ships of 5.066.276 Dwt are between 0-9 age range,
- 106 ships of 1.654.025 Dwt are between 10-19 age range,
- 112 ships of 684.028 Dwt are between 20-29 age range,
- 160 ships of 786.333 Dwt are between 30 and over age range.

DIVISIONS OF TONNAGE	Table (5) Turkish Merchant Fleet Distribution by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	20	5569	0,11	10	3527	0,21	15	5448	0,80	38	6294	0,80	83	20839
1500-5999	61	255186	5,04	36	137269	8,30	59	208614	30,50	88	291991	37,13	244	893061
6000-9999	23	164671	3,25	24	198253	11,99	24	176822	25,85	16	115183	14,65	87	654930
10000-34999	64	1166964	23,03	20	377027	22,79	13	246315	36,01	16	282781	35,96	113	2073088
35000-52999	5	209139	4,13	12	573223	34,66	1	46826	6,85	1	36600	4,65	19	865788
53000-79999	27	1632983	32,23	3	199866	12,08	0	0	0,00	1	53483	6,80	31	1886332
80000-119999	6	515059	10,17	0	0	0,00	0	0	0,00	0	0	0,00	6	515059
120000+	7	1116702	22,04	1	164859	9,97	0	0	0,00	0	0	0,00	8	1281561
TOTAL	203	5066276	100,00	106	1654025	100,00	112	684028	100,00	160	786333	100,00	591	8190661
Source:Turkish Cahmber of Shipping - 2015														

Graph shows age groups of the fleet. 59 % of the fleet are between 0-9 age range, 20 % of the fleet are between 10-19 age range, 8 % of the fleet are between 20-29 age range and 13 % 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 (216 ships) which is 1.198.559 DWT.

- 46 ships of 271.734 DWT are between 0-9 age range,
- 28 ships of 191.915 DWT are between 10-19 age range,
- 62 ships of 374.125 DWT are between 20-29 age range,
- 80 ships of 360.784 DWT are between 30 and over age range.

DIVISIONS OF TONNAGE	Table (6) Dry Cargo Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL	
	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	35	157388,8	57,92	16	55445,96	28,89	41	149439,2	39,94	63	210822,8	58,43	155	573096,79
6000-9999	5	34781,36	12,80	11	86604	45,13	17	126210,7	33,73	12	86895,31	24,09	45	334491,32
10000-34999	6	79563,81	29,28	0	0	0,00	3	51649,9	13,81	5	63066	17,48	14	194279,71
35000-52999	0	0	0,00	1	49865	25,98	1	46826	12,52	0	0	0,00	2	96691
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	46	271734	100,00	28	191915	100,00	62	374125,8	100,00	80	360784,1	100,00	216	1198558,8
Source:Turkish Cahmber of Shipping - 2015														

23 % of Dry Cargo Ships are between 0-9 age range, 16 % are between 10-19 age range, 31 % are between 20-29 age range, 30 % are 30 years and over.

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

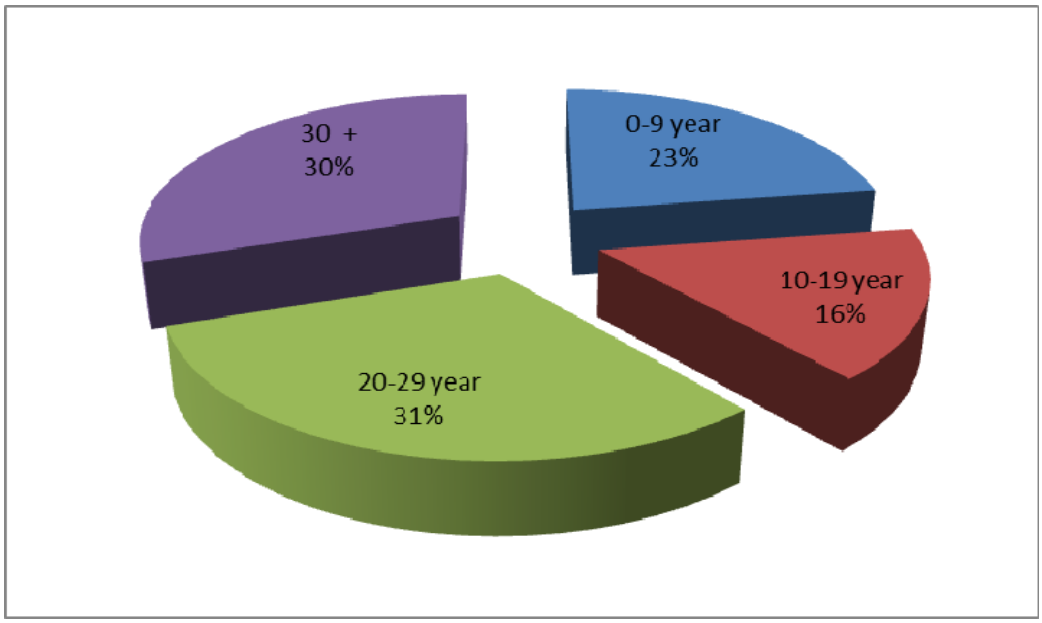
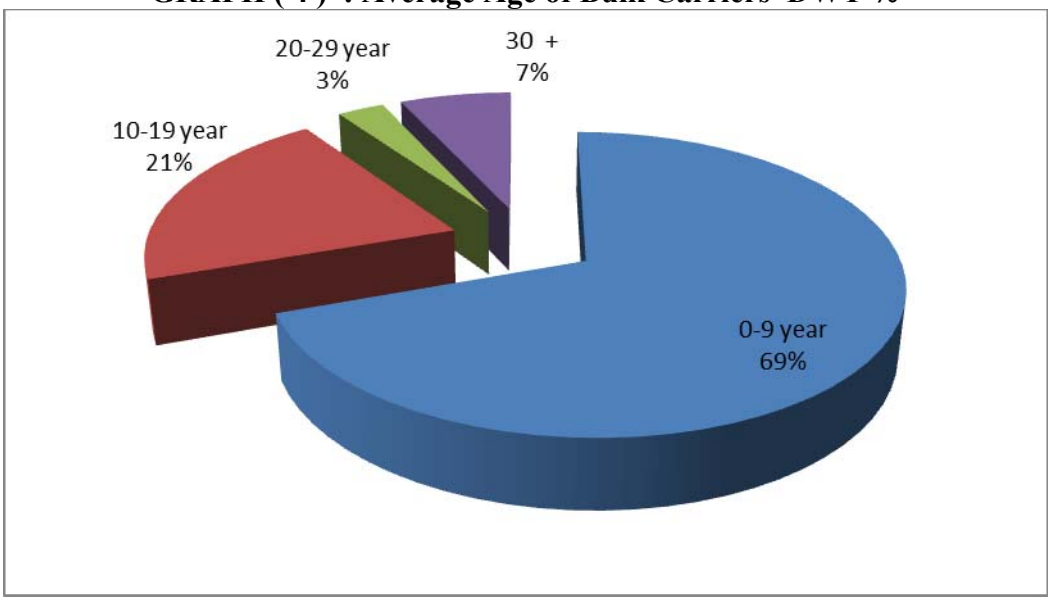


Table 7 shows the bulk carrier segment (89 ships) which is 4.180.226 DWT.

- 52 ships of 2.908.580 DWT are between 0-9 age range,
- 20 ships of 863.353 DWT are between 10-19 age range,
- 5 ships of 120.938 DWT are between 20-29 age range,
- 11 ships of 287.356 DWT are between 30 and over age range.

DIVISIONS OF TONNAGE	Table (7)Bulk Carrier Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
1500-5999	1	4342	0,1	0	0	0,0	1	4213	3,5	0	0	0,0	2	8555
6000-9999	2	13201	0,5	0	0	0,0	0	0	0,0	0	0	0,0	2	13201
10000-34999 (HandySize)	11	285534	9,8	6	140129	16,2	4	116725	96,5	9	197273	68,7	30	739661
35000-52999 (HandyMax)	3	119060	4,1	11	523358	60,6	0	0	0,0	1	36600	12,7	15	679018
53000-79000 (Panamax)	27	1632983	56,1	3	199866	23,1	0	0	0,0	1	53483	18,6	31	1886332
80000-119999 (CapeSize)	6	515059	17,7	0	0	0,0	0	0	0,0	0	0	0,0	6	515059
120000 + (Large Size)	2	338400	11,6	0	0	0,0	0	0	0,0	0	0	0,0	2	338400
TOTAL	52	2908580	100,0	20	863353	100,0	5	120938	100,0	11	287356	100,0	88	4180227
Source:Turkish Cahmber of Shipping - 2015														

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



69 % of the bulk carriers are 0-9 age range, 21 % are 10-19 age range, 3 % are 20-29 age range and 7 % are 30 age and over.

Table 8 shows oil tankers segment (23 ships) which is 1.106.079 DWT

- 10 ships of 806.898 DWT are 0-9 age range,
- 7 ships of 190.836 DWT are 10-19 age range,
- 1 ships of 2.878 DWT are 20-29 age range,
- 5 ships of 15.467 DWT are 30 age and over.

DIVISIONS OF TONNAGE	TABLE (8) :Oil Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0 - 9 Years			10 - 19 Years			20 - 29 Years			30 +Years			Total	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150 - 1499	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
1500 - 5999	3	6414	0,8	6	25977	13,6	1	2878	100,0	5	15467	100,0	15	50736
6000 - 19999	2	22181	2,7	0	0	0,0	0	0	0,0	0	0	0,0	2	22181
20000 – 49999 (Product Tanker)	0	0	0,0	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	0,0	0	0
80000 - 109999 (Aframax)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
110000 - 164999 (Suezmax)	5	778302	96,5	1	164859	86,4	0	0	0,0	0	0	0,0	6	943161
165000 - 299999 (VLCC)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
300000 + (ULCC)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
Total	10	806898	100,0	7	190836	100,0	1	2878	100,0	5	15467	100,0	23	1016079
Source:Turkish Cahmber of Shipping - 2015														

79 % of the oil tankers are 0-9 age range, 19 % are 10-19 age range and 2 % are 30 age and over.

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

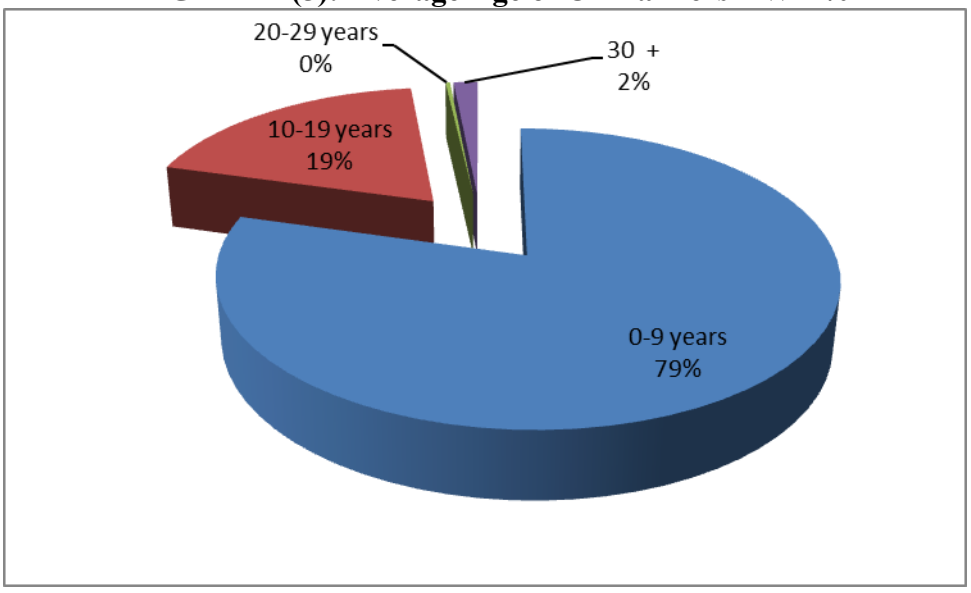


Table 9 shows the average age of the chemical tankers (59 ships) which are 440.128 DWT.

- 37 ships of 332.558 DWT are 0-9 age range,
- 5 ships of 19.075 DWT are 10-19 age range,
- 9 ships of 52.047 DWT are 20-29 age range,
- 7 ships of 36.448 DWT are 30 age and over.

DIVISIONS OF TONNAGE	TABLE (9) :Chemical Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0 - 9 Years			10 - 19 Years			20 - 29 Years			30 +Years			Total	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150 - 1499	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
1500 - 5999	16	62974	18,9	5	19075	100,0	4	18215	35,0	5	16898	46,4	31	1171623
6000 - 19999	21	218052	65,6	0	0	0,0	5	33832	65,0	2	19550	53,6	28	2714323
20000 - 49999 (Product Tanker)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
50000 - 79999 (Panamax)	1	51532	15,5	0	0	0,0	0	0	0,0	0	0	0,0	1	51532
80000 - 109999 (Aframax)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
110000 - 164999 (Suezmax)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
165000 - 299999 (VLCC)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
300000 + (ULCc)	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
Total	38	332558	100,0	5	19075	100,0	9	52047	100,0	7	36448	100,0	59	440128

Source:Turkish Cahmber of Shipping - 2015

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

-+

76 % of other type of tankers are 0-9 age range, 4 % are 10-19 age range, 12 % are 20-29 age range and 8 % are 30 age and over.

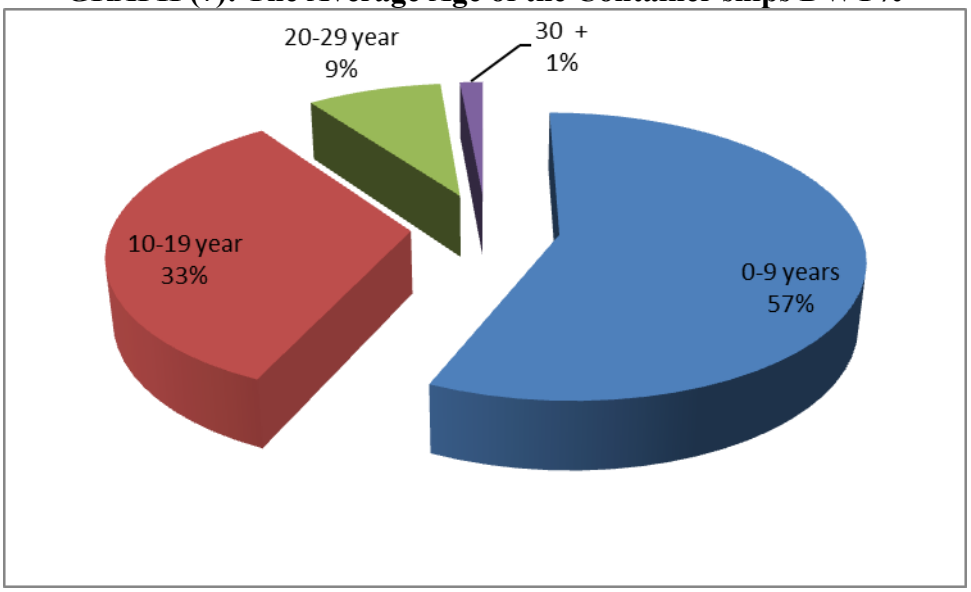
Table 10 shows the average age of the Container ships (53 ships) which are 841.535 DWT.

- 22 ships of 476.684 DWT are 0-9 age range,
- 22 ships of 280.455 DWT are 10-19 age range,
- 8 ships of 72.165 DWT are 20-29 age range,
- 1 ships of 12.231 DWT are 30 age and over

DIVISIONS OF TONNAGE	TABLE (10) :Container Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0 - 9 Years			10 - 19 Years			20 - 29 Years			30 +Years			Total	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
1500-5999	1	3301	0,7	2	8027	2,9	3	12490	17,3	0	0	0,0	6	23818
6000-9999	1	6366	1,3	7	54385	19,4	1	9766	13,5	0	0	0,0	9	70517
10000-34999	19	428470,8	89,9	13	218043	77,7	4	49909	69,2	1	12231	100,0	37	708653,8
35000-52999	1	38547	8,1	0	0	0,0	0	0	0,0	0	0	0,0	1	38547
53000-79999	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
80000-119999	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
120000+	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
Total	22	476684	100,0	22	280455	100,0	8	72165	100,0	1	12231	100,0	53	841535

Source:Turkish Cahmber of Shipping - 2015

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



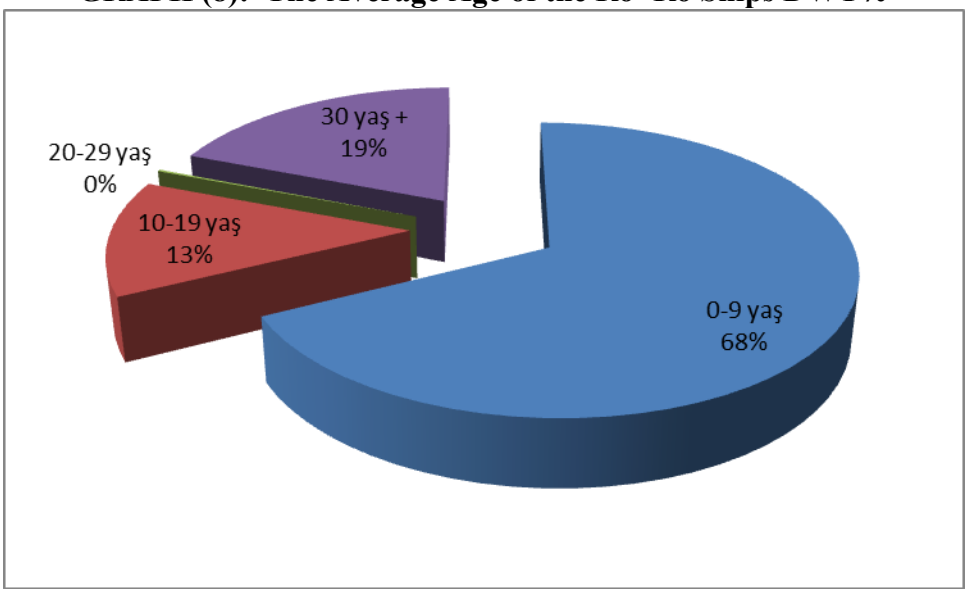
57 % of Container ships are 0-9 age range, 33 % are 10-19 age range and 9 % are 20-29 age range and 1% 30 age and over.

Table 11 shows the average age of the Ro- Ro Ships, (23 ships) which are 225.828 DWT.

- 13 ships of 152.768 DWT are 0-9 age range,
- 3 ships of 29.630 DWT are 10-19 age range,
- 1 ships of 457 DWT are 20-29 age range,
- 6 ships of 42.973 DWT are 30 age range and over.

DIVISIONS OF TONNAGE	TABLE (11) :Ro-Ro Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)													
	0 - 9 Years			10 - 19 Years			20 - 29 Years			30 +Years			Total	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,0	0	0	0,0	1	457	100,0	0	0	0,0	1	457
1500-5999	0	0	0,0	0	0	0,0	0	0	0,0	4	14941,4	34,8	4	14941
6000-9999	1	9481	6,2	3	29630	100,0	0	0	0,0	0	0	0,0	4	39111
10000-34999	12	143287	93,8	0	0	0,0	0	0	0,0	2	28032	65,2	14	171319
35000-52999	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
53000-79999	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
80000-119999	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
120000+	0	0	0,0	0	0	0,0	0	0	0,0	0	0	0,0	0	0
Total	13	152768	100,0	3	29630	100,0	1	457	100,0	6	42973,4	100,0	23	225828
Source:Turkish Cahmber of Shipping - 2015														

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



68 % of Ro-Ro Ships are 0-9 age range, 13 % are 10-19 age range and 19 % 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 623 ships, 11.3 % of total fleet (71 ships) registered in National Ship Registry and 88.7 % of total fleet (552 ships) registered in International Ship Registry.

The total DWT and GRT values of ships which are 1000 DWT and over are 8.365.159 DWT and 5.679.078 GRT. The majority of these tonnage on DWT basis is composed of 49.97 % bulk carriers,15.57 % dry cargo ships and 12,44 % oil tankers.

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

4.9 % of the dry cargo segment which is totally 1.302.198 DWT are registered in National Ship Registry, 95.1 % are registered in International Ship Registry.

10.9 % of the dry bulk segment which is totally 4.180.227 DWT are registered in National Ship Registry, 89.1 % are registered in International Ship Registry.

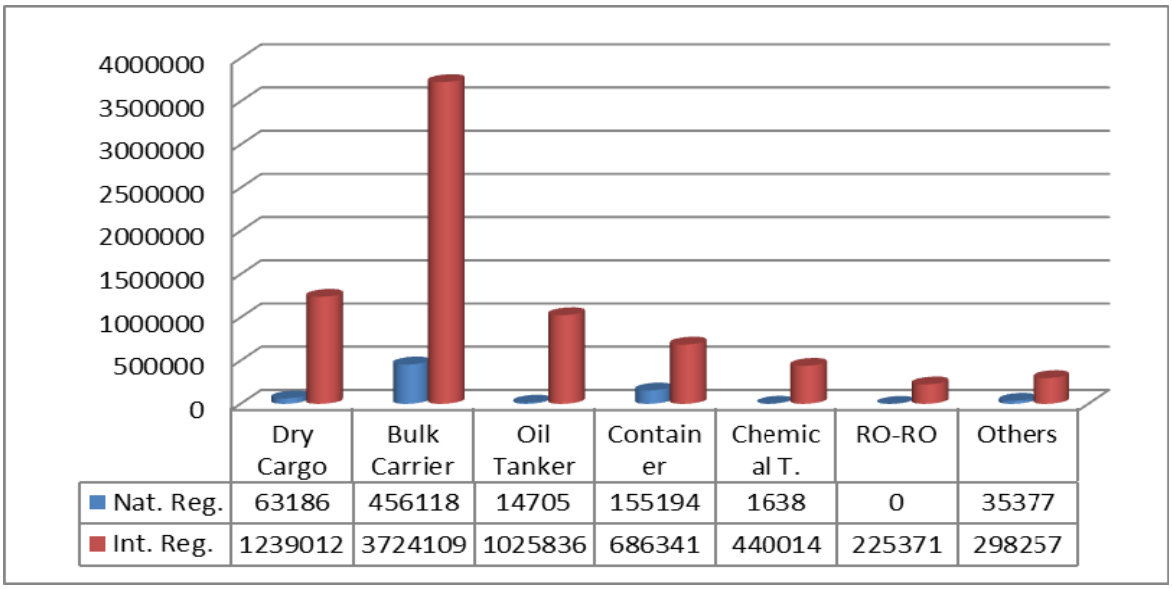
1.4 % of the oil tanker segment which is totally 1.040.541 are registered in National Ship Registry, 98.6 % are registered in International Ship Registry.

0,3 % of the Chemical Tankers which are totally 441.652 DWT are registered in National Ship Registry. 99,7 % are registered in International Ship Registry.

18,4 % of the Chemical Tankers which are totally 841.535 DWT are registered in National Ship Registry. 81,6 % are registered in International Ship Registry

Ro/Ro ship segment which is totally 225.371 DWT are 100 % registered in International Ship Registry.

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



	Dry Cargo	Bulk Carrier	Oil Tanker	Container	Chemical T.	RO-RO	Others
Nat. Reg.	63186	456118	14705	155194	1638	0	35377
Int. Reg.	1239012	3724109	1025836	686341	440014	225371	298257

TABLE (12) The General Examination of The Turkish Merchant Fleet by Number And Tonnage According to Import and Built (1000 DWT and over)									
	Count			DWT			GRT		
SHIP TYPES	Import	Built	Total	Import	Built	Total	Import	Built	Total
DRY CARGO	221	63	284	869.788	432.411	1.302.199	543.804	299.167	842.971
BULK CARRIER	7	81	88	161.879	4.018.348	4.180.227	102.027	2.289.606	2.391.633
CONTAINERS	21	32	53	246.675	594.861	841.535	184.329	479.224	663.553
DRY CARGO/CONTAINERS	12	4	16	97.824	18.288	116.112	68.894	12.771	81.665
CHEMICAL TANKERS	38	22	60	244.416	197.236	441.652	163.179	124.272	287.451
LPG TANKERS	0	6	6	0	30.789	30.789	0	29.336	29.336
ASPHALT TANKERS	2	1	3	39.936	2.770	42.706	31.348	1.900	33.248
WATER BARGES	1	0	1	1.027	0	1.027	488	0	488
RO-RO SHIPS	0	22	22	0	225.371	225.371	0	524.356	524.356
RO-RO FERRY-PASSENGER	3	5	8	3.935	18.471	22.406	3.840	28.673	32.513
FERRY BOATS	2	1	3	3.062	1.790	4.852	2.659	10.870	13.529
TRAIN FERRIES	1	0	1	1.300	0	1.300	123.286	0	123.286
PASSENGER AND CARGO SHIPS	1	3	4	1.700	6.866	8.566	10.583	24.380	34.963
SCIENTIFIC RESEARCH VESSEL	1	0	1	4.200	0	4.200	2.569	0	2.569
SEA BUSES	0	1	1	0	29.642	29.642	0	431	431
HARBOUR CAR FERRIES	8	0	8	15.667	0	15.667	11.699	0	11.699
TUGS	0	1	1	0	1.049	1.049	0	1.356	1.356
SERVICE SHIPS	9	10	19	11.974	34.498	46.472	3.945	27.500	31.445
OTHERS	0	2	2	0	2.580	2.580	0	1.533	1.533
OIL TANKERS	28	13	41	64.159	976.381	1.040.540	39.266	516.592	555.858
TRAIN FERRY/RO-RO	0	1	1	0	6.266	6.266	0	15.195	15.195
TOTAL :	**268**	**355**	**623**	**100,00**	**1.767.542**	**6.597.617**	**1.291.916**	**4.387.162**	**5.679.078**

Source: Turkish Chamber of Shipping - 2015

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

	COUNT				DWT				GRT			
SHIP TYPES	**National Reg.**	**Inter. Reg.**	**Total**	**%**	**National Reg.**	**Inter. Reg.**	**Total**	**%**	**National Reg.**	**Inter. Reg.**	**Total**	**%**
DRY CARGO	26	258	284	45,60	63.186	1.239.012	1.302.198	15,57	39.241	803.731	842.972	14,84
BULK CARRIER	11	77	88	14,13	456.118	3.724.109	4.180.227	49,97	262.689	2.128.944	2.391.633	42,10
CONTAINERS	7	46	53	8,51	155.194	686.341	841.535	10,06	125.422	538.131	663.553	11,68
DRY CARGO/CONTAINERS	1	15	16	2,57	2.356	113.756	116.112	1,39	1.720	79.945	81.665	1,44
CHEMICAL TANKERS	1	59	60	9,63	1.638	440.014	441.652	5,28	1.082	286.369	287.451	5,06
LPG TANKERS	0	6	6	0,96	0	30.789	30.789	0,37	0	29.336	29.336	0,52
ASPHALT TANKERS	1	2	3	0,48	2.770	39.936	42.706	0,51	1.900	31.348	33.248	0,59
WATER BARGES	0	1	1	0,16	0	1.027	1.027	0,01	0	488	488	0,01
RO-RO SHIPS	0	22	22	3,53	0	225.371	225.371	2,69	0	524.356	524.356	9,23
RO-RO FERRY-PASSENGER	0	8	8	1,28	0	22.406	22.406	0,27	0	32.513	32.513	0,57
FERRY BOATS	0	3	3	0,48	0	4.852	4.852	0,06	0	13.529	13.529	0,24
TRAIN FERRIES	1	0	1	0,16	1.300	0	1.300	0,02	123.286	0	123.286	2,17
PASSENGER AND CARGO SHIPS	3	1	4	0,64	6.776	1.790	8.566	0,10	24.093	10.870	34.963	0,62
SCIENTIFIC RESEARCH VESSEL	0	1	1	0,16	0	4.200	4.200	0,05	0	2.569	2.569	0,05
SEA BUSES	0	1	1	0,16	0	29.642	29.642	0,35	0	431	431	0,01
HARBOUR CAR FERRIES	1	7	8	1,28	2.314	13.353	15.667	0,19	1.596	10.103	11.699	0,21
TUGS	0	1	1	0,16	0	1.049	1.049	0,01	0	1.356	1.356	0,02
SERVICE SHIPS	11	8	19	3,05	18.488	27.984	46.472	0,56	7.283	24.162	31.445	0,55
OTHERS	1	1	2	0,32	1.373	1.207	2.580	0,03	734	799	1.533	0,03
OIL TANKERS	7	34	41	6,58	14.705	1.025.836	1.040.541	12,44	8.497	547.361	555.858	9,79
TRAIN FERRY/RO-RO	0	1	1	0,16	0	6.266	6.266	0,07	0	15.195	15.195	0,27
Total :	71	552	623	100,00	726.218	7.638.940	8.365.158	100,00	597.543	5.081.536	5.679.079	100,00

Source: Turkish Chamber of Shipping - 2015

Table (14) :The Average Age Profile of the Turkish Merchant Fleet (1000 GRT and Over)				
Ship Types	**Nr**	**DWT**	**GRT**	**Ave. Age**
DRY CARGO	284	1.302.199	842.971	27
BULK CARRIER	88	4.180.227	2.391.633	12
CONTAINERS	53	841.535	663.553	13
DRY CARGO/CONTAINERS	16	116.112	81.665	11
CHEMICAL TANKERS	60	441.652	287.451	13
LPG TANKERS	6	30.789	29.336	22
ASPHALT TANKERS	3	42.706	33.248	11
WATER BARGES	1	1.027	488	46
RO-RO SHIPS	22	225.371	524.356	14
RO-RO FERRY-PASSENGER	8	22.406	32.513	29
FERRY BOATS	3	4.852	13.529	16
TRAIN FERRIES	1	1.300	123.286	49
PASSENGER AND CARGO SHIPS	4	8.566	34.963	34
SCIENTIFIC RESEARCH VESSEL	1	4.200	2.569	2
SEA BUSES	1	29.642	431	17
HARBOUR CAR FERRIES	8	15.667	11.699	31
TUGS	1	1.049	1.356	38
SERVICE SHIPS	19	46.472	31.445	32
OTHERS	2	2.580	1.533	35
OIL TANKERS	41	1.040.540	555.858	18
TRAIN FERRY/RO-RO	1	6.266	15.195	36
TOTAL	623	8.365.159	5.679.078	21
Source: Turkish Chamber of Shipping - 2015				

Table (15) : Turkish Merchant Fleet Distribution by Tonnage and Age Groups (Dwt)														
DIVISIONS OF TONNAGE	**No**	**DWT**	**%**	**No**	**DWT**	**%**	**No**	**DWT**	**%**	**No**	**DWT**	**%**	**No**	**DWT**
150-1499	3	3450	0,07	3	4140	0,25	21	27234	3,76	43	53921	6,18	70	88745
1500-5999	67	265248	5,22	39	141978	8,41	62	213930	29,57	120	348859	40,00	288	970015
6000-9999	24	171105	3,37	24	198253	11,74	24	176822	24,44	15	108750	12,47	87	654930
10000-34999	64	1166964	22,97	21	406669	24,08	14	258546	35,74	15	270549	31,02	114	2102728
35000-52999	5	209139	4,12	12	573223	33,94	1	46826	6,47	1	36600	4,20	19	865788
53000-79999	27	1632983	32,14	3	199866	11,83	0	0	0,00	1	53483	6,13	31	1886332
80000-119999	6	515059	10,14	0	0	0,00	0	0	0,00	0	0	0,00	6	515059
120000+	7	1116703	21,98	1	164859	9,76	0	0	0,00	0	0	0,00	8	1281562
Total :	203	5080651	100,00	103	1688988	100,00	122	723358	100,00	195	872162	100,00	623	8365159

The Position of The Turkish Merchant Fleet Within the World Fleet

In 2014 our tonnage under foreign flags is 19,2 million DWT, as of 1 January 2015, concerning the ships of 1000 Grt and above, the total tonnage of the Turkish ship-owners, both under Turkish flag and foreign flags is 27.5 million DWT.

As of the beginning of 2015, regarding the Turkish Ship owners' ships of 1000 GRT and above, 30.2 % percent of these ships are registered under Turkish flag and 69.8 % are registered under foreign flags.

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

(1000 GRT and above)								
Years	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**

Source: ISL January-February 2015

GRAPH (10): Progress of the Turkish Merchant Fleet

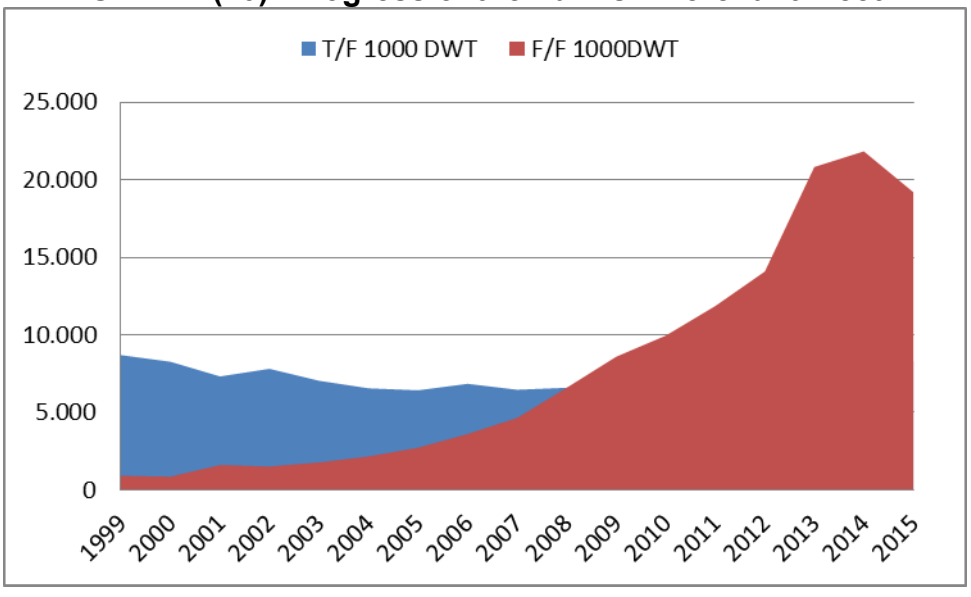


TABLE (17): Total Fleet of the 30 countries by National and Foreign Flags
(01 January 2015) ***(1000 GRT and over)***

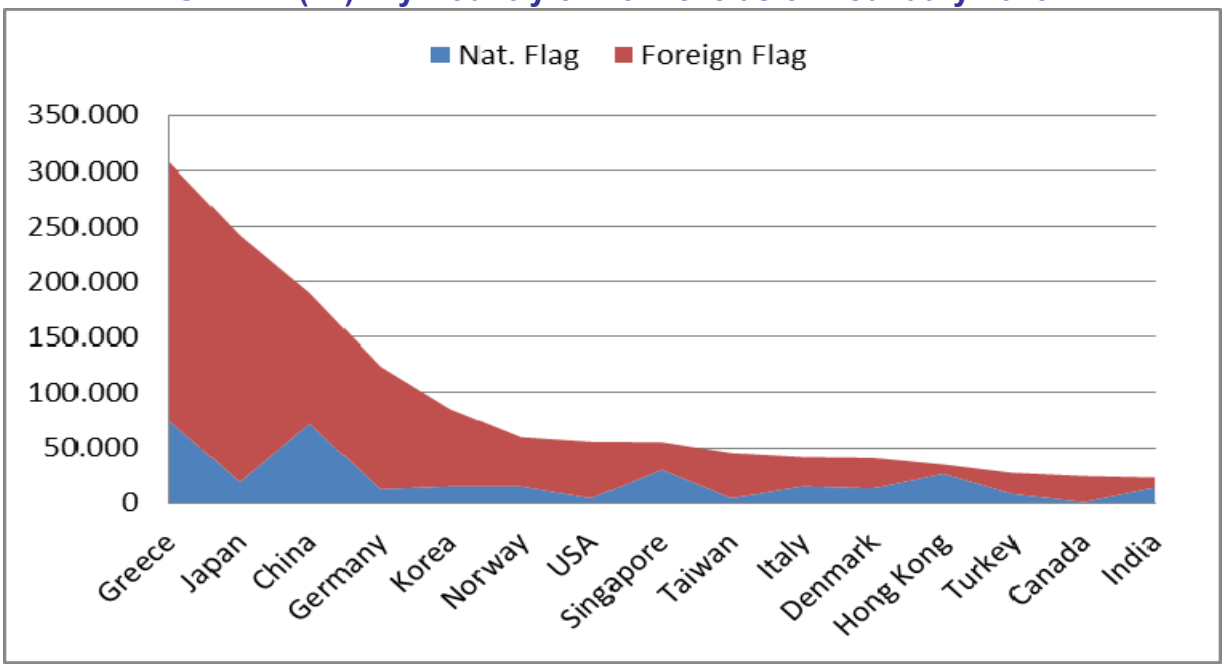
Country	National Flag				Foreign Flag				Controlled Fleet			
	No	1000 dwt	1000 TEU	Ave Age	No	1000 dwt	1000 TEU	Ave Age	No	1000 dwt	1000 TEU	Ave Age
Greece	807	74.938	152	13,6	3.445	233.190	1.604	11,0	4.252	308.128	1.755	11,5
Japan	709	19.244	13	12,5	3.426	222.936	1.327	7,2	4.135	242.180	1.340	8,1
China	2.489	72.019	595	10,8	2.231	117.744	930	11,8	4.720	189.793	1.524	11,3
Germany	256	12.641	923	13,9	3.389	111.113	4.860	9,4	3.645	123.574	5.784	9,8
Korea	719	15.164	91	17,9	904	70.003	617	9,9	1.623	85.167	708	13,5
Norway	498	15.064	71	15,0	1.050	44.853	313	13,9	1.548	59.917	384	14,2
USA	201	4.602	70	23,3	869	51.075	204	13,3	1.070	55.677	274	15,29
Singapore	735	30.181	772	8,2	588	24.959	258	15,1	1.323	55.140	1031	11,3
Taiwan	105	4.606	125	16,2	741	40.708	824	10,8	846	45.314	949	11,5
Italy	505	15.335	58	13,8	522	26.523	1064	10,9	1027	41.858	1.123	12,4
Denmark	330	13.459	683	12,8	572	27.677	788	9,5	844	47.532	945	11,2
Hong Kong	453	26.665	422	7,2	301	8.455	50	17,9	754	35.121	472	11,5
Turkey	**564**	**8.297**	**96**	**18,0**	**834**	**19.209**	**108**	**18,5**	**1.398**	**27.507**	**204**	**18,3**
Canada	112	1.028	7	30,7	327	23.598	514	9,8	439	24.626	521	15,1
India	474	13.906	23	11,6	152	9.346	7	12,9	626	23.253	30	11,9
Russia	1.075	5.476	71	27,1	508	17.276	46	18,4	1.583	22.753	117	24,3
England	223	6.302	130	11,1	358	15.684	233	12,3	581	21.986	363	11,9
Belgium	61	7.005	1	10,2	131	11.132	44	8,3	192	18.137	45	8,9
Iran	135	3.920	98	15,6	70	14.093	13	11,3	205	18.013	112	14,1
Indonesia	1.351	11.275	158	24,8	145	3.625	12	14,8	1.496	14.900	171	23,8
Saudi Arabia	60	1958	8	18,3	81	11.339	1	13,6	141	13.297	8	15,6
Brazil	66	2.116	14	22,8	44	11.149	-	10,2	110	13.265	14	17,8
Malaysia	221	6.423	17	16,4	85	5.952	3	14,6	306	12.376	20	15,9
UAE	42	302	0	12,8	401	11.790	65	20,0	443	12.093	65	19,3
Holland	626	5.412	211	9,6	266	5.120	56	12,7	892	10.532	267	10,6
France	112	2.864	189	13,2	169	7.521	392	9,6	281	10.385	581	11,1
Kuwait	35	5.299	22	8,0	46	3.442	209	8,2	81	8.741	230	8,1
Bermuda	0	0	0	0	33	7.512	0	14,5	33	7.512	0	14,5
Viet Nam	738	5.835	31	10,3	78	1.183	7	20,0	816	7.018	37	11,3
Oman	28	3856		11,4	9	3.158	0	7,7	37	7.014	0	9,3
Total 30 Countries	**13.730**	**396.682**	**5.238**	**15,1**	**21.761**	**1.155.585**	**14.534**	**11,3**	**35.491**	**1.552.267**	**19.722**	**12,8**

Source : ISL January February 2015

Table 17 shows the first 30 countries which own the largest merchant fleet in the world scale. 94 % of the World fleet (1000 **Grt and over**) of 1.5 Billion DWT, is being controlled by the following countries as of 1 January 2015.

The biggest fleets with open registry flags (1000 GRT and over), in national and foreign flag vessels Greece is on the 1st row, Japan is on the 2nd and China is on the 3rd row, whereas Turkey is on the 13th row.

GRAPH (11): By Country of Domicile as of 1 January 2015



The World fleet (300 GRT and over) is 50422 ships of 1.661.008.000 DWT based on 152 countries as of 01.01.2015. The position of Turkish merchant fleet is shown in the Table as being on 23st place in World ranking

Panama, having a share of 20.6 % is in the first place, Liberia, having a share of 12.0 % is in the second place, Marshall Island, having a share of 10.1 % is in the third place.

The Turkish fleet range among the World fleets between the years 2005 and 2015 is as follows:

- In 2005, the 24 th
- In 2006, the 24 th
- In 2007, the 26 th
- In 2008, the 25 th
- In 2009, the 26 th
- In 2010, the 26 th
- In 2011, the 24 th
- In 2012, the 23 rd
- In 2013, the 22 nd
- In 2014, the 23 rd
- In 2015, the 23 rd

TABLE (18): World Merchant Fleet Ranking by Flag as of January 1st, 2015 (300 GRT and over)

Rank	Country	No of	1000 GRT	1000 DWT	1000 TEU	DWT %	Annual Change %
1	Panama	6.745	221.472	342.950	3.074	20.6%	-1.1%
2	Liberia	2.996	127.087	198.800	3.731	12.0%	-1.0%
3	Marshall Island	2.345	103.432	168.584	1028	10.1%	15.7%
4	Hong Kong	2.271	92.274	150.332	2.215	9.1%	9.4%
5	Singapore	2.208	73.957	112.317	1.989	6.8%	10.7%
6	Malta	1.757	53.050	81.503	941	4.9%	12.4%
7	Greece	1.044	44.046	78.169	152	4.7%	1.5%
8	China	2.818	46.166	72.443	603	4.4%	2.5%
9	Bahamas	1.132	49.252	63.308	221	3.8%	0.2%
10	UK	797	27.766	37.764	801	2.3%	-6.6%
11	S. Cyprus	829	20.813	32.954	464	2.0%	3.0%
12	Japan	2.524	16.080	21.554	16	1.3%	7.9%
13	Norway	781	14.466	18.289	73	1.1%	-3.2%
14	Italy	732	15.296	16.945	120	1.0%	-13.4%
15	Denmark	462	14.235	16.581	880	1.0%	13.7%
16	Korea	1.023	10.117	16.327	92	1.0%	-3.1%
17	India	799	8.590	14.719	30	0.9%	1.2%
18	Indonesia	2.535	9.306	12.990	165	0.8%	3.0%
19	Antiqua & Barbuda	1.117	9.783	12.624	737	0.8%	-5.1%
20	Germany	316	11.346	12.550	928	0.8%	-22.8%
21	Tanzania	200	6.254	11.667	11	0.7%	0.0%
22	Bermuda	140	10.672	9.827	50	0.6%	1.2%
23	**Turkey**	**878**	**5.883**	**8.702**	**97**	**0.5%**	**-3.9%**
24	Belgium	80	5.133	8.328	1	0.5%	29.6
25	US	349	7.166	8.039	257	0.5%	5.2%
World Total :152 Country		**50.422**	**1.104.671**	**1.661.008**	**20.602**	**100,00%**	**3.5%**

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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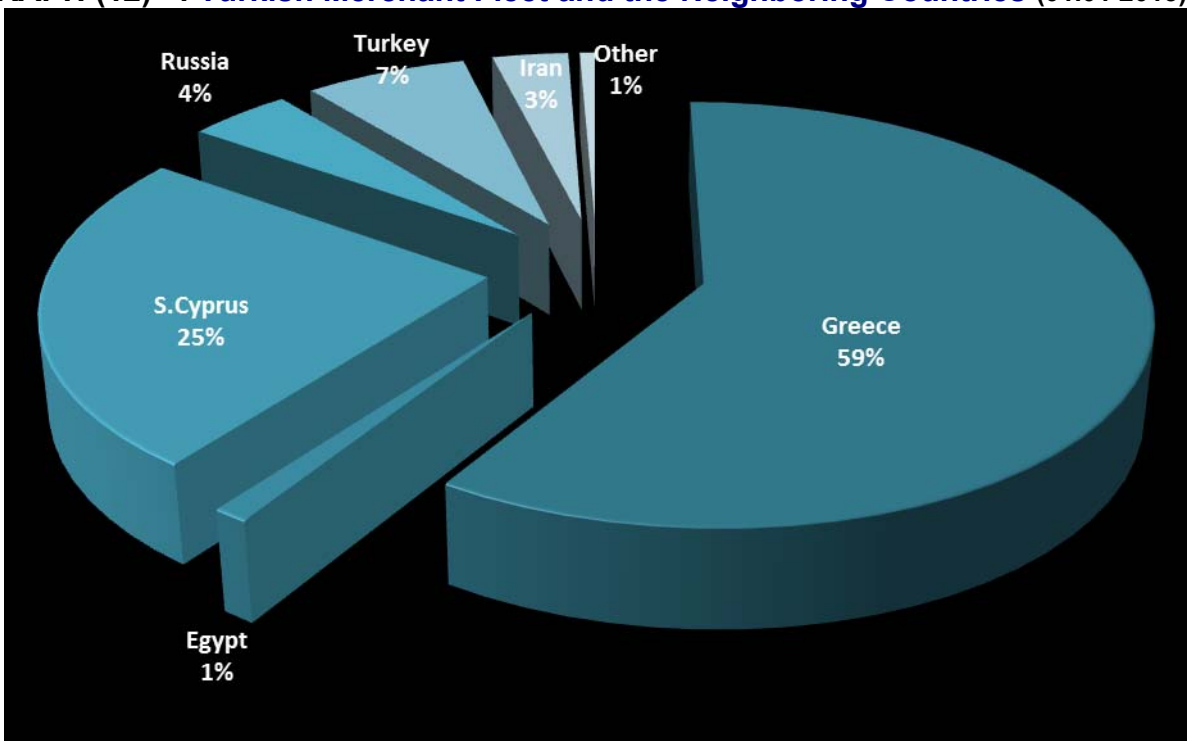
TABLE (19): Turkish Merchant Fleet and the Neighboring Countries (01.01 2015)
(300 Grt and over)

World dwt rank	Country	No	1000 DWT	World Share %	Change Rate %
7	Greece	1.044	78.169	4,70%	1,5%
11	S. Cyprus	829	32.954	2,00%	3,00%
23	**Turkey**	**878**	**8.702**	**0,5%**	**-3,9%**
31	Russia	1385	6146	0,4%	7,4%
36	Iran	337	4244	0,30%	-0,3%
56	Egypt	80	1332	0,10%	-10,5%
84	Ukraine	121	366	0.0	-10,8%
92	Georgia	25	195	0.0	-32,2%
98	Bulgaria	30	141	0.0	-46,50%
109	Syria	11	66	0.0	-24,9%
114	Romania	28	49	0.0	-5,7%

Source: ISL January-February 2015

GRAPH (12) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2015)

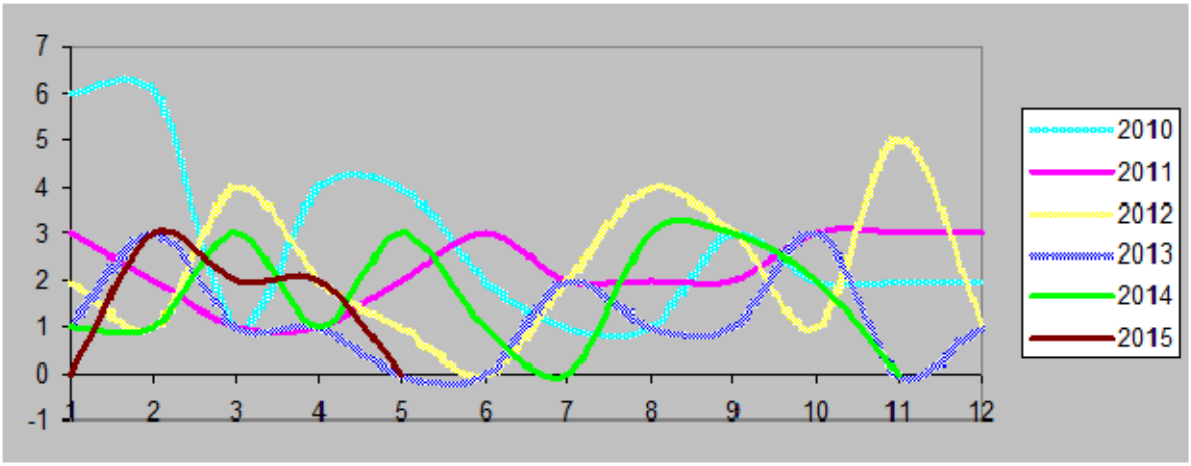


Port State Control Applications

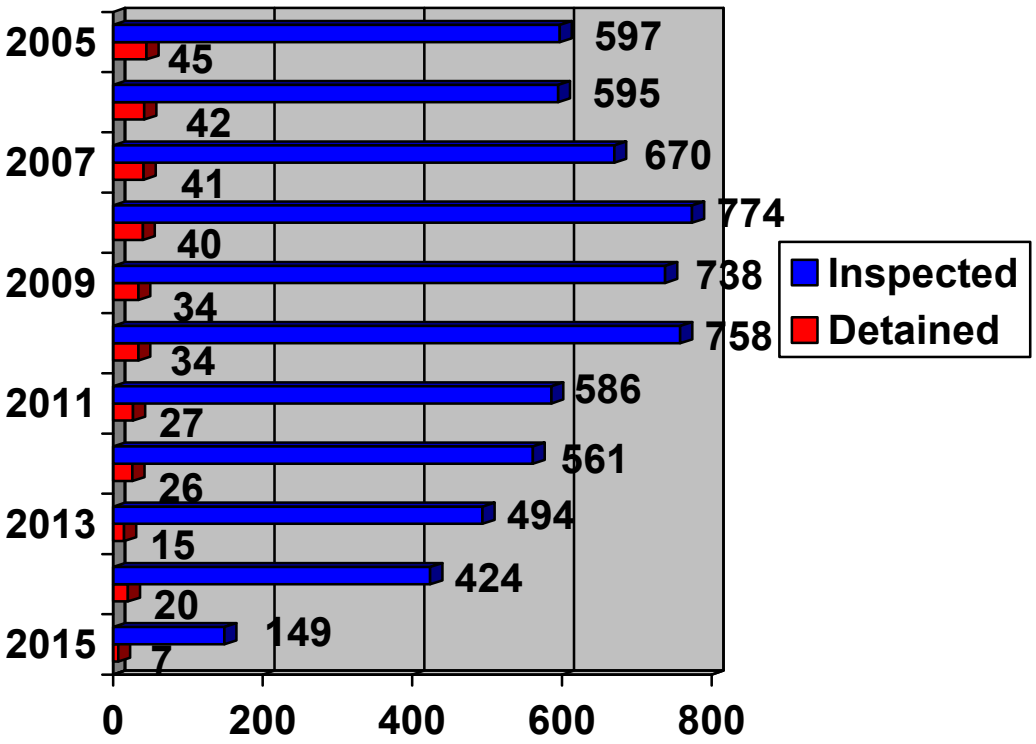
Turkey is in the White List.

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.

GRAPH (13) : Inspected and Detained Ships By Years



GRAPH (14) : Inspected and Detained Ship by Years



Source: Paris MoU Web Site

CHAPTER II

DEVELOPMENT OF TONNAGE CARRIED BY TURKISH MERCHANT FLEET IN 2014

The Developments in the Transportation of Foreign Trade Cargoes

86.2 % of the Turkey's foreign trade is being realised by maritime transportation. The progress of transportation between the years of 2005-2014 is shown in the Table below by the modes of transportation.

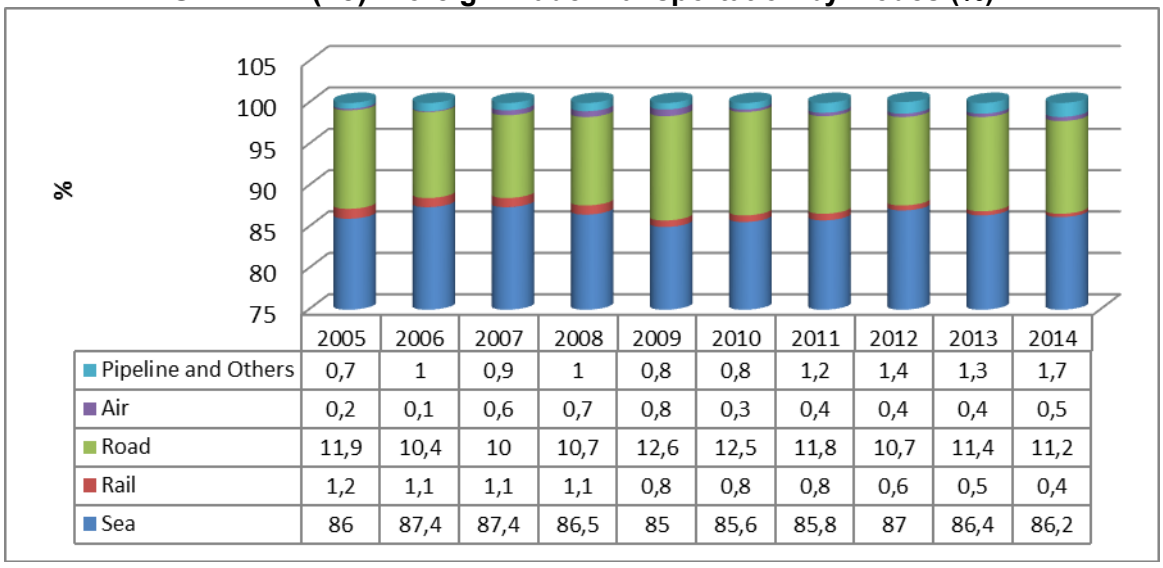
TABLE (20): Foreign Trade Transportation by Modes (%)

Years	Sea	Rail	Road	Air	Pipeline and Others
2005	86	1,2	11,9	0,2	0,7
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**

Source: Turkstat

86.2 % of the volume of Turkey's foreign trade transportation has been carried by sea, 11.2 % has been carried by road, 0.4 % has been carried by rail, 0.5 % has been carried by air, and 1.7 % has been carried by other transportation modes.

GRAPH (15): Foreign Trade Transportation by Modes (%)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Pipeline and Others	0,7	1	0,9	1	0,8	0,8	1,2	1,4	1,3	1,7
Air	0,2	0,1	0,6	0,7	0,8	0,3	0,4	0,4	0,4	0,5
Road	11,9	10,4	10	10,7	12,6	12,5	11,8	10,7	11,4	11,2
Rail	1,2	1,1	1,1	1,1	0,8	0,8	0,8	0,6	0,5	0,4
Sea	86	87,4	87,4	86,5	85	85,6	85,8	87	86,4	86,2

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

Modes	Import $ 2013	Import $ 2014	Export $ 2013	Export $ 2014	Foreign Trade $ 2013	Foreign Trade $ 2014	Difference % 2013-2014
Sea	139.924.504.402	141.387.178.988	82.981.613.956	86.318.216.546	222.906.118.358	227.705.395.534	2,15%
Rail	1.773.327.224	1.206.626.075	957.083.680	922.791.603	2.730.410.904	2.129.417.678	-22,00%
Road	40.055.410.312	37.300.838.943	53.717.353.194	55.289.314.355	93.772.763.506	92.590.153.298	-1,26%
Air	32.597.753.071	24.696.882.758	12.932.500.556	14.103.218.758	45.530.253.627	38.800.101.516	-14,78%
Pipeline and Others	37.299.565.063	2.825.658.334	1.279.999.174	1.008.612.840	38.579.564.237	3.834.271.174	-90,06%
Total	251.650.560.072	207.417.185.098	151.868.550.560	157.642.154.102	403.519.110.632	365.059.339.200	-9,53%

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 2011-2012-2013-2014 is shown below:

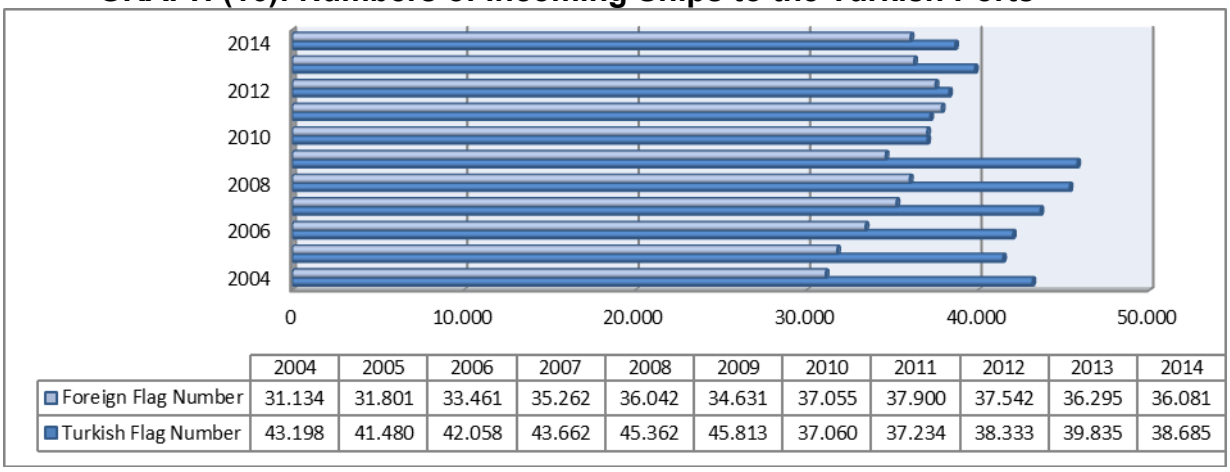
- In 2011, the number of incoming vessels increased by 1.4% when compared with 2010,
- In 2012, the number of incoming vessels increased by 1 % when compared with 2011,
- In 2013, the number of incoming vessels decreased by 0.3% when compared with 2012.
- In 2014, the number of incoming vessels decreased by 1.8 % when compared with 2013.

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

Years	Turkish Flag Number	Foreign Flag Number	Total Number	TF %	FF %
2004	43.198	31.134	74.332	58,11	41,89
2005	41.480	31.801	73.281	56,6	43,4
2006	42.058	33.461	75.519	55,69	44,31
2007	43.662	35.262	78.924	55,32	44,68
2008	45.362	36.042	81.404	55,72	44,28
2009	45.813	34.631	80.444	56,95	43,05
2010	37.060	37.055	74.115	50	50
2011	37.234	37.900	75.134	49,6	50,4
2012	38.333	37.542	75.875	50,5	49,5
2013	39.835	36.295	76.130	52,32	47,68
2014	38.685	36.081	74.766	51,74	48,26

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

GRAPH (16): Numbers of Incoming Ships to the Turkish Ports



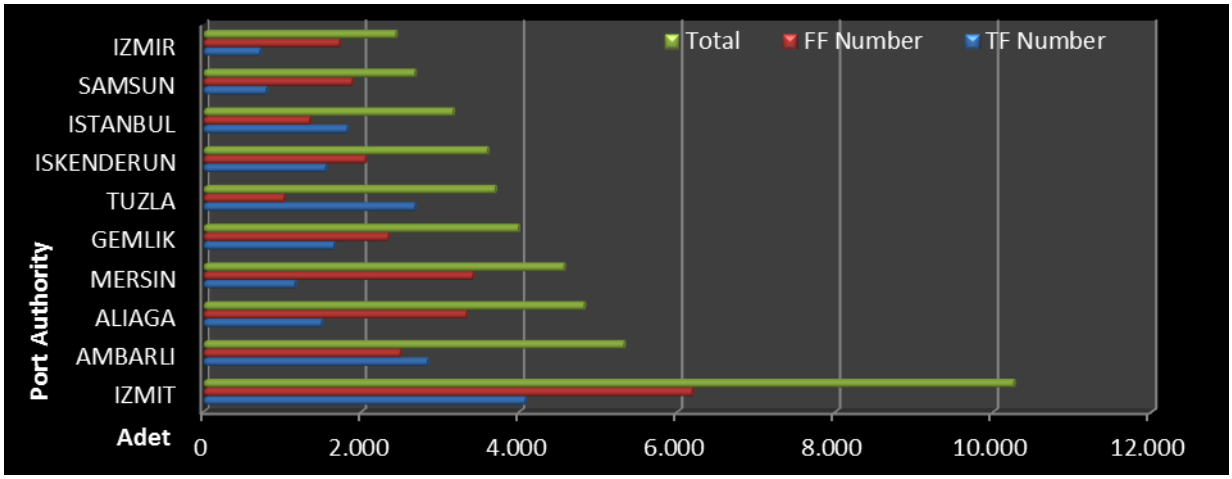
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Foreign Flag Number	31.134	31.801	33.461	35.262	36.042	34.631	37.055	37.900	37.542	36.295	36.081
Turkish Flag Number	43.198	41.480	42.058	43.662	45.362	45.813	37.060	37.234	38.333	39.835	38.685

Table (23): Numbers of Incoming Ships to the Turkish Ports in 2014

Port Authority	Turkish Flag		Foreign Fag		Total	
	Ship Number	Gross Ton	Ship Number	Gross Ton	Ship Number	Gross Ton
IZMIT	4.070	15.391.533	6.182	106.006.905	10.252	121.398.438
AMBARLI	2.832	16.131.706	2.486	71.544.024	5.318	87.675.730
ALIAĞA	1.493	7.020.910	3.321	52.538.826	4.814	59.559.736
MERSIN	1.155	7.808.406	3.406	54.653.626	4.561	62.462.033
GEMLIK	1.648	7.380.065	2.334	45.727.675	3.982	53.107.740
TUZLA	2.672	14.676.111	1.016	10.780.496	3.688	25.456.607
ISKENDERUN	1.545	4.479.644	2.046	29.774.555	3.591	34.254.199
ISTANBUL	1.815	3.429.484	1.341	34.980.681	3.156	38.410.165
SAMSUN	793	2.831.546	1.878	10.680.515	2.671	13.512.061
IZMIR	713	4.700.110	1.719	38.119.640	2.432	42.819.750
DIGER	19.949	28.457.959	10.352	131.390.974	30.301	159.848.933
TOTAL	**38.685**	**112.307.475**	**36.081**	**586.197.918**	**74.766**	**698.505.393**

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

Graphic (17): The Number of Incoming Ships to the Turkish Ports



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.

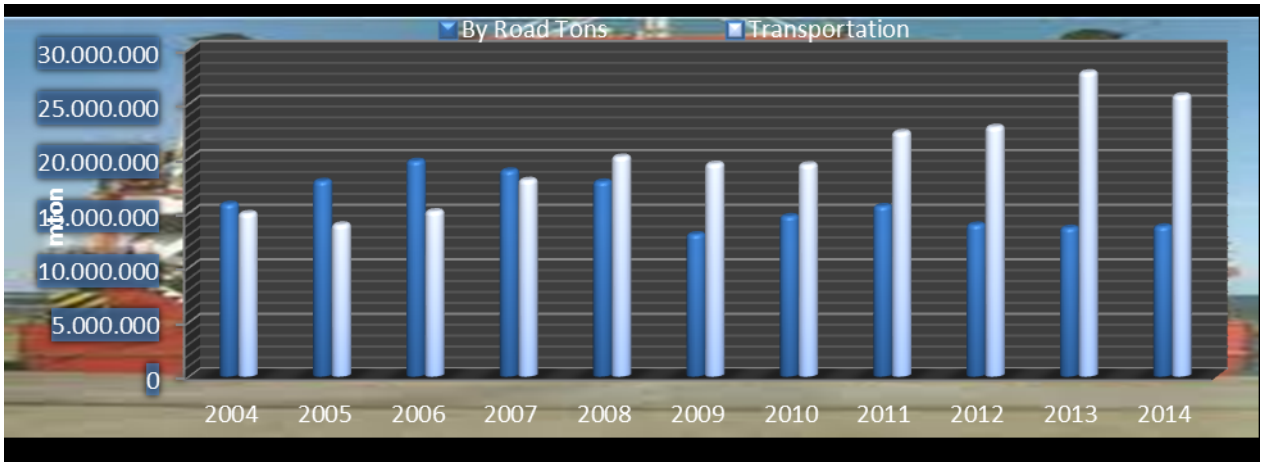
The amounts of cargoes carried by Ferries and carried as bulk and partial cargoes between 2004- 2014 in Turkish ports and wharves on ton basis are at the Table

TABLE (24): 2004-2014 Cabotage Transportation

	Cabotage	Cabotage	Total Cabotage	Change
Years	**By Road Tons**	**Transportation**	**Tons**	**%**
2004	15.810.494	14.958.778	30.769.272	7,3
2005	17.911.082	13.922.865	31.833.947	3,5
2006	19.756.679	15.133.337	34.890.016	9,6
2007	18.873.278	18.004.619	36.877.897	5,7
2008	17.856.494	20.136.037	37.992.531	3
2009	13.027.429	19.485.900	32.513.329	-14,4
2010	14.686.657	19.434.485	34.121.142	4,9
2011	15.612.213	22.389.570	38.001.783	11,4
2012	13.913.980	22.869.458	36.783.438	-3,2
2013	13.623.118	27.868.157	41.491.275	12,8
2014	**13.745.113**	**25.753.831**	**39.498.944**	-4,8

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

GRAPH (18): 2004-2014 Cabotage Transportation



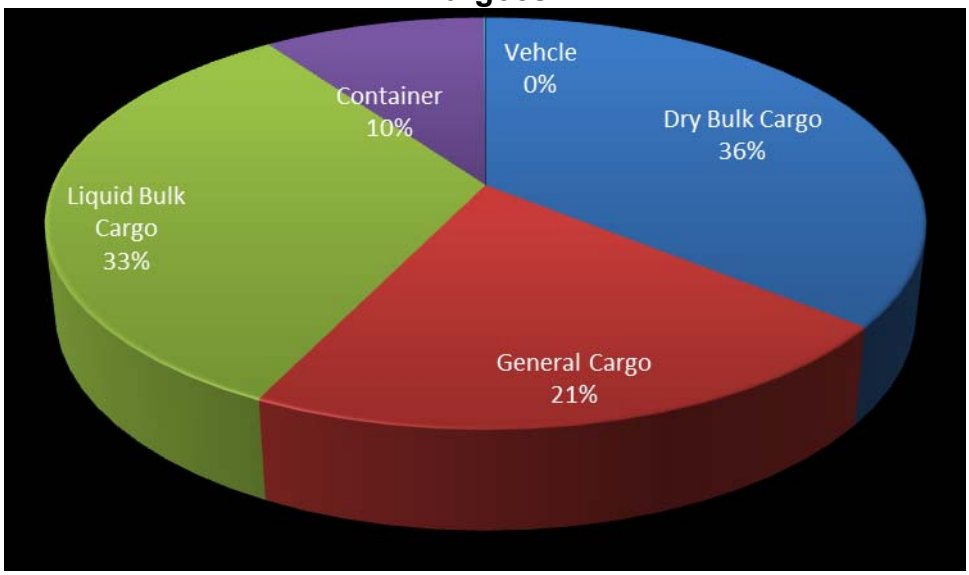
The total cabotage transportation in 2014 is 39.498.944 tons; 13.745.113 tons is carried by Ferries and 25.753.831 tons is carried as bulk and partial cargoes (Table 24). The cabotage transportation increased about 34.8 % between the years 2004-2014.

TABLE (25) 2014 –Cabotage Transportation by the Types of Cargoes

Cargo Types	Cabotage Loading	Cabotage Unloading	Total	%
Dry Cargo	8.383.920	9.834.675	18.218.595	35,91
General Cargo	5.398.262	5.405.204	10.803.466	21,30
Liquid Bulk Cargo	8.606.627	8.124.096	16.730.723	32,98
Container	2.568.852	2.366.463	4.935.315	9,73
Vehicle	20.086	23.393	43.479	0,09
Total	24.977.747	25.753.831	50.731.578	100,00

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

GRAPH (19): 2014 Cabotage Transportation (Loading-Unloading) by the Types of Cargoes



The most significant increase in cabotage transportation is seen in 2013 by 12.8 %, the increase in 2011 by 11.4 and 2006 by 9.6 % respectively.
Table 25. Shows the cabotage transportation by types of cargoes. The first three cargoes are liquid bulk cargo (33 %), dry bulk cargo (36%) general cargo (21%) and container (10%).
In cabotage handling in 2014, Kocaeli Port (15%), Ambarlı Port (12%) and Aliağa Port (9%) took the first three place.
In cabotage loading, Kocaeli Port (15%), Iskenderun and Aliağa Ports (12%) and Canakkale Port (9%) are on the first three places, while in cabotage unloading Ambarlı Port (18%), Kocaeli Port (14%) and Istanbul Port (8%) are on the top of the list.

TABLE (26): 2014 Cabotage Transportation in Ports

Port Authority	Cabotage Loading	Cabotage Unloading	Total
KOCAELİ	3.771.584	3.852.805	7.624.389
AMBARLI	1.372.468	4.645.238	6.017.706
ALİAĞA	2.951.670	1.769.885	4.721.555
İSKENDERUN	3.097.933	681.493	3.779.426
KARADENİZ EREĞLİ	707.863	2.033.283	2.741.146
ÇANAKKALE	2.326.246	57.364	2.383.610
KARABİGA	1.322.230	988.965	2.311.195
TUZLA	470.974	1.725.340	2.196.314
İSTANBUL	34.286	2.052.711	2.086.997
GEMLİK	865.012	1.034.382	1.899.394
TEKİRDAĞ	934.771	839.962	1.774.733
SAMSUN	937.771	665.987	1.603.758
BOTAŞ(CEYHAN)	1.547.500	37.851	1.585.351
MARMARA A.	1.288.841	8.389	1.297.230
MERSİN	362.712	859.731	1.222.443
ANTALYA	85.656	804.175	889.831
BANDIRMA	672.277	204.207	876.484
ÜNYE	600.386	189.090	789.476
RİZE	0	739.479	739.479
TRABZON	201.978	439.579	641.557
İZMİR	199.253	421.915	621.168
BARTIN	277.856	252.934	530.790
YALOVA	900	465.963	466.863
ZONGULDAK	173.300	219.935	393.235
TİREBOLU	0	357.551	357.551
İNEBOLU	324.051	850	324.901
HOPA	132.680	129.623	262.303
GÜLLÜK	148.952	7.885	156.837
GÖCEK	0	96.380	96.380
AMASRA	82.260	700	82.960
MUDANYA	58.320	1.910	60.230
FATSA	0	46.879	46.879
ERDEK	0	38.200	38.200
ÇEŞME	0	27.620	27.620
TAŞUCU	16.917	450	17.367
ORDU	0	16.925	16.925
MARMARİS	0	16.329	16.329
GİRESUN	4.700	7.816	12.516
DİKİLİ	6.100	4.354	10.454
VAKFIKEBİR	0	9.100	9.100
BODRUM	0	596	596
SÜRMENE	300	0	300
Total	24.977.747	25.753.831	50.731.578

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

TABLE (27): 2005-2014 Cabotage Transportation Vehicle Number

Years	Vehicle Number	Annual Change %	Vehicle Number x Mile	Annual Change %2
2005	6.961.643	0,9	42.294.836	3,6
2006	7.773.689	11,7	51.978.669	22,9
2007	8.161.999	5	59.942.527	15,3
2008	8.866.797	8,6	82.950.808	38,4
2009	9.315.772	5,1	82.580.396	-0,4
2010	9.400.735	0,9	83.607.444	1,2
2011	10.402.917	10,7	83.283.519	-0,4
2012	10.710.645	2,9	77.785.568	-6,6
2013	11.318.561	5,7	85.096.902	9,4
2014	12.166.505	7,5	89.322.962	5

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

In table 27, the changes in transportation of vehicles in cabotage between the years 2005 and 2014 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 75% in total between 2005 and 2014.

GRAPH (20): 2005-2014 Cabotage Transportation Vehicle Number

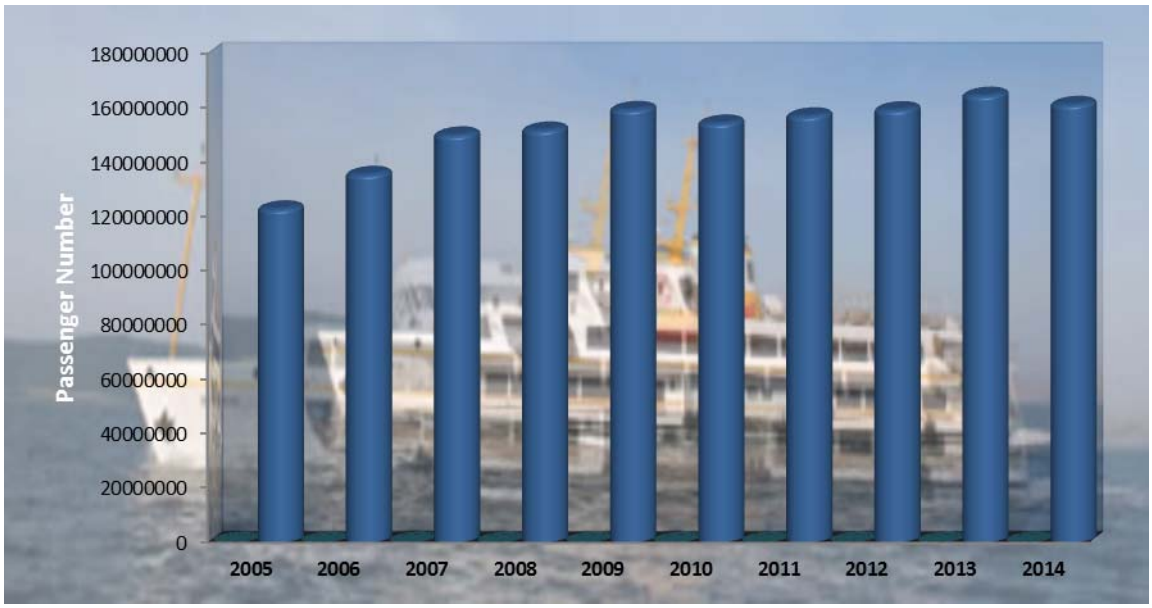
The Table about the numbers of passengers carried in cabotage transportation shows that the biggest increase was in 2004 with 13% and then, in 2007 the increase became 10.7%. In the years 2004-2014 an increase of 31.3 % in passengers' number was realized.

TABLE (28): 2004-2014 Cabotage Transportation Passenger Number

Years	Passenger Number	Change %	Vehicle Number x Mile	Change %2
2004	112.816.094	13	621.484.444	12,9
2005	122.661.230	8,7	670.751.087	7,9
2006	135.348.554	10,3	752.889.731	12,2
2007	149.824.929	10,7	842.975.355	12
2008	151.645.639	1,2	847.917.253	0,6
2009	159.194.370	5	886.609.389	4,6
2010	154.198.088	-3,1	847.715.977	-4,4
2011	156.842.003	1,7	854.909.150	0,8
2012	159.076.921	1,4	787.572.051	-7,9
2013	164.426.997	3,4	900.226.869	14,3
2014	161.048.004	2,0	974.923.011	8,3

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

GRAPH (21): 2004-2014 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 (29): Development of the Seaborne Trade (2005-2014) Tons

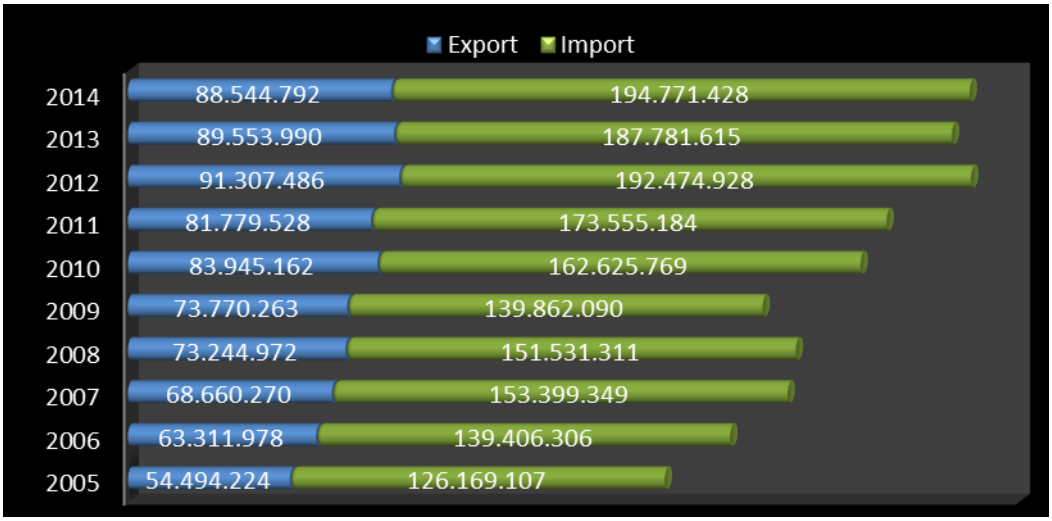
Years	Seaborne Trade Total	Export	Import	Turkish Flag	TF %	FF %
2005	180.663.331	54.494.224	126.169.107	42.874.811	24	76
2006	202.718.284	63.311.978	139.406.306	42.615.725	21	79
2007	222.059.619	68.660.270	153.399.349	36.992.141	17	83
2008	224.776.283	73.244.972	151.531.311	31.791.383	14	86
2009	213.632.353	73.770.263	139.862.090	29.965.566	14	86
2010	246.570.931	83.945.162	162.625.769	40.494.118	16	84
2011	255.334.712	81.779.528	173.555.184	42.396.010	17	83
2012	283.782.414	91.307.486	192.474.928	38.712.247	14	86
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

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

In 2014 export shipments decreased to 88.5 million tons, import shipments increased to 283.3 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 2005-2014 have been realized as 15.6 % on the average.

GRAPH (22): Development of the Seaborne Trade (Tons)



The transportation of foreign trade cargoes; 11 % of the import transportation totaling 194.7 million tons have been carried by Turkish flag vessels. 14 % of the export transportation totaling 88.5 million tons have been carried by Turkish flag vessels.

TABLE (30): Foreign Trade Transportation by Flags

	Turkish Flag mTons				Foreign Flag mTons				Total mTons	
Years	TF Import	%	TF Export	%	FF Import	%	FF Export	%	TF Seaborne Trade	FF Seaborne Foreign 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

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

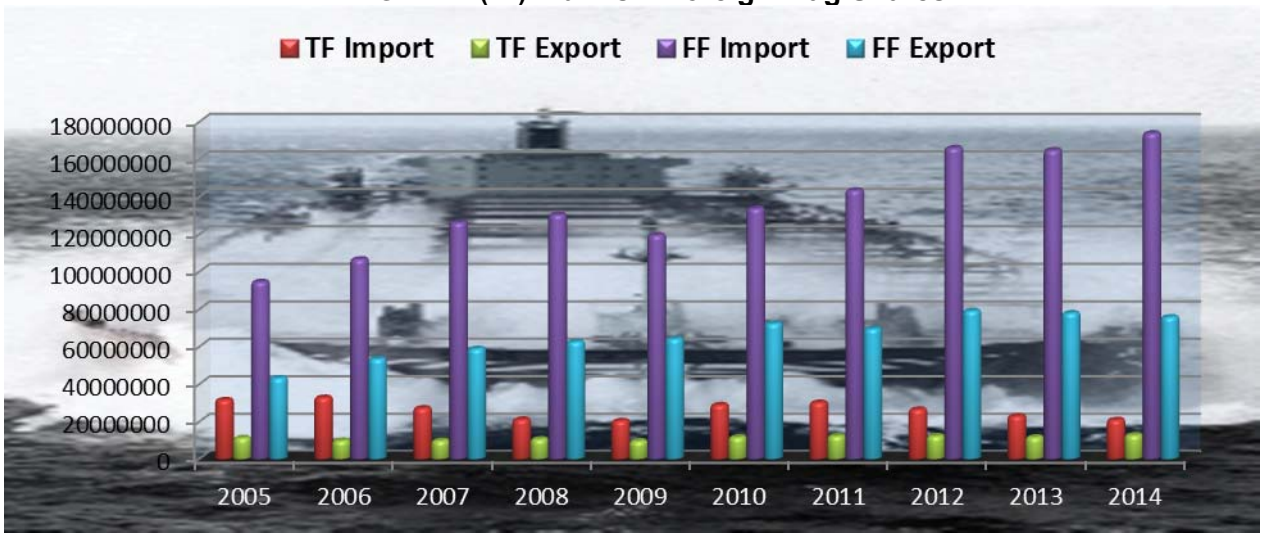
The transportation of seaborne foreign trade cargoes increased to 249 million tons when compared with 2014 (137.7 million tons). Import goods increased to 194 million tons, (126.1 million tons) export goods increased to 88.5 million tons (54.9 million tons) when compared with 2005 with the same period.

GRAPH (23): Turkish/Foreign Flag Shares (Tons)

The share of Turkish flag vessels, in total foreign trade transportation, in export basis increased to 12.7 million tons and in Import basis decreased to 20.8 million tons in 2014, when compared with 11.2 and 31.5 million tons in 2005.

The share of foreign flag vessels, in total foreign trade transportation, in export basis increased to 75 million tons and in Import basis increased to 173.8 million tons in 2014, when compared with 43.1 and 94.5 million tons in 2005.

GRAPH (24): Turkish /Foreign Flag Shares



Development in Foreign Trade Transportation by Types of Cargoes

The foreign trade cargoes transported by vessels of Turkey according to the types of cargoes are shown in the Table 31 and 32.

The major segments of the exports and transit loading goods in 2014, which realized totally as 132.7 million tons are % 37.3 Liquid Bulk cargo, 33.2 % Container, 15.6 % general cargo and 10.8 % dry bulk cargo. Major segments of the imported and transit unloading goods in 2014, which realized totally as 199.6 million tons are 32 % dry bulk cargo, 21 % Liquid bulk Cargo, 26 % Container, % 18 General Cargo and % 3 Vehicle.

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

	LOADING				
	EXPORT				
Cargo Types	**Turkish Flag**	**Foreign Flag**	**Total**	**Transit Loading**	**Total Loading**
Dry Bulk Cargo	2.683.433	11.692.037	14.375.470	17.242	14.392.712
General Cargo	2.196.684	18.445.636	20.642.320	47.668	20.689.988
Liquid Bulk Cargo	252.135	10.050.037	10.302.172	39.196.450	49.498.622
Container	4.581.079	34.526.044	39.107.123	4.976.003	44.083.126
Vehicle	3.030.624	1.087.083	4.117.707	0	4.117.707
Total	12.743.955	75.800.837	88.544.792	44.237.363	132.782.155

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

GRAPH (25): Export and Transit Loading by the Types of Cargoes 2014

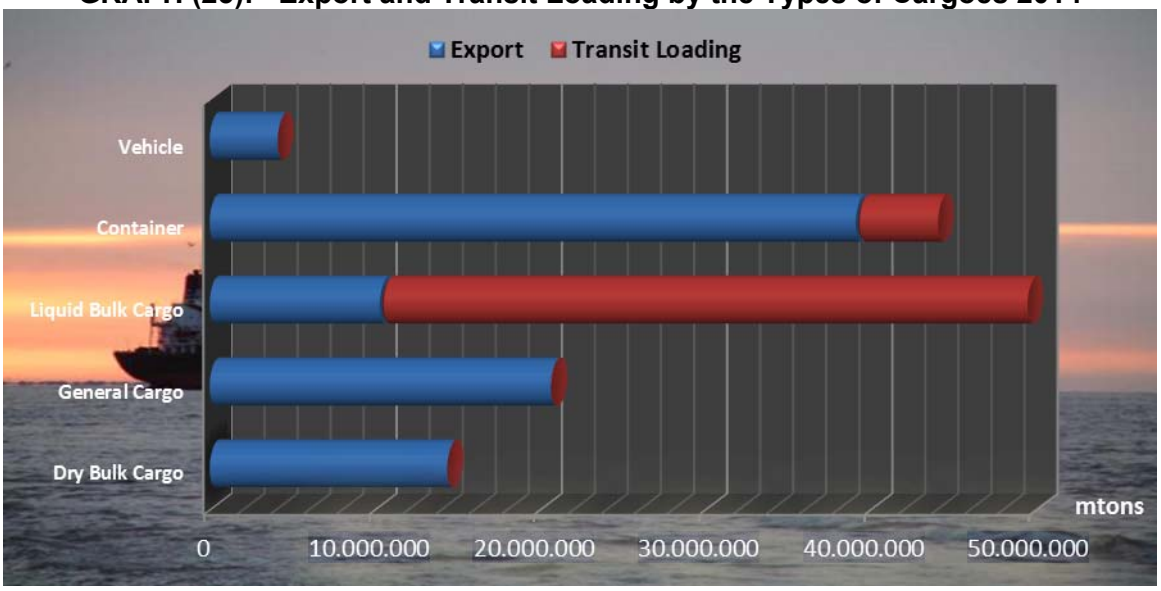
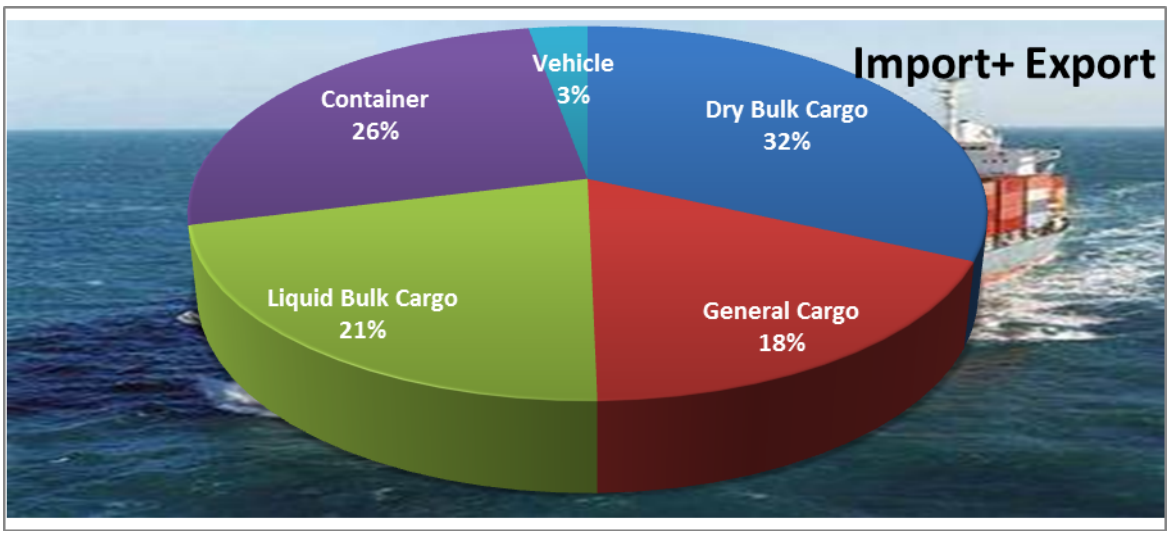


TABLE (32): BY TYPES CARGO HANDLING IMPORT AND TRANSIT UNLOADING

	UNLOADING				
	IMPORT				
Cargo Types	**Turkish Flag**	**Foreign Flag**	**Total Import**	**Transit Unloading**	**Import + Transit**
Dry Bulk Cargo	5.929.412	70.180.691	76.110.103	23.270	76.133.373
General Cargo	4.478.046	25.132.120	29.610.166	79.571	29.689.737
Liquid Bulk Cargo	4.039.133	46.262.497	50.301.630	403.113	50.704.743
Container	3.181.624	31.608.777	34.790.401	4.329.504	39.119.905
Vehicle	3.252.152	706.976	3.959.128	0	3.982.521
Total	20.880.367	173.891.061	194.771.428	4.835.458	199.606.886

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

GRAPH (26): Import and Transit Unloading by the Types of Cargoes



The Progress in Seaborne Trade by Country Groups

In the year 2014, 40.4 million tons of export and 65.4 million tons of import, totally 105.8 million tons of transportation have been realized to the OECD countries. Table 33 and 34 shows the export and import values to the OECD countries.

TABLE (33): Seaborne Trade to OECD Countries Tons (2014)

	LOADING				
	EXPORT				
OECD Country	Turkish Flag	Foreign Flag	Total Export	Transit Loading	Total Loading
Italy	4.652.480	6.342.749	10.995.229	23.437.267	34.432.496
Spain	622.524	5.186.916	5.809.440	1.182.737	6.992.177
Greece	755.728	4.980.825	5.736.553	1.693.538	7.430.091
Israel	742.312	3.057.338	3.799.650	183.592	3.983.242
Belgium	34.214	3.595.714	3.629.928	128.798	3.758.726
U.S.A.	246.005	2.751.896	2.997.901	1.523.145	4.521.046
England	37.599	2.047.680	2.085.279	206.683	2.291.962
France	547.687	830.919	1.378.606	1.520.531	2.899.137
Holland	67.771	855.307	923.078	154.624	1.077.702
Portugal	12.775	769.712	782.487	949.427	1.731.914
Germany	0	669.624	669.624	9.431	679.055
Canada	0	524.271	524.271	96.759	621.030
Sweden	0	508.443	508.443	362	508.805
Poland	8.000	167.158	175.158	789	175.947
Chile	0	107.811	107.811	5.148	112.959
South Korea	10	78.892	78.902	13.236	92.138
Iceland	0	78.075	78.075	0	78.075
Ireland	0	32.313	32.313	676	32.989
Norway	0	29.545	29.545	454	29.999
Japan	0	29.291	29.291	18.856	48.147
Finland	0	23.753	23.753	1.562	25.315
Denmark	0	19.885	19.885	777	20.662
Mexico	0	11.359	11.359	626	11.985
Australia	0	5.324	5.324	90.163	95.487
Total	7.727.105	32.704.800	40.431.905	31.219.181	71.651.086

***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 48.1 %, Spain 10.4 %, Greece 9.7 % shares.
Among OECD countries, the first three that Turkey imports from / that conducts transit unloading in Turkey are U.S.A. (22.2%), Greece (13.9%) and Italy (12.3%).

In the year of 2014, the seaborne trade volume between Turkey and the OECD countries was 138.709.977 metric tons. 105.8 million metric tons of this amount was import –export while 32.8 million metric tons was transit cargoes.

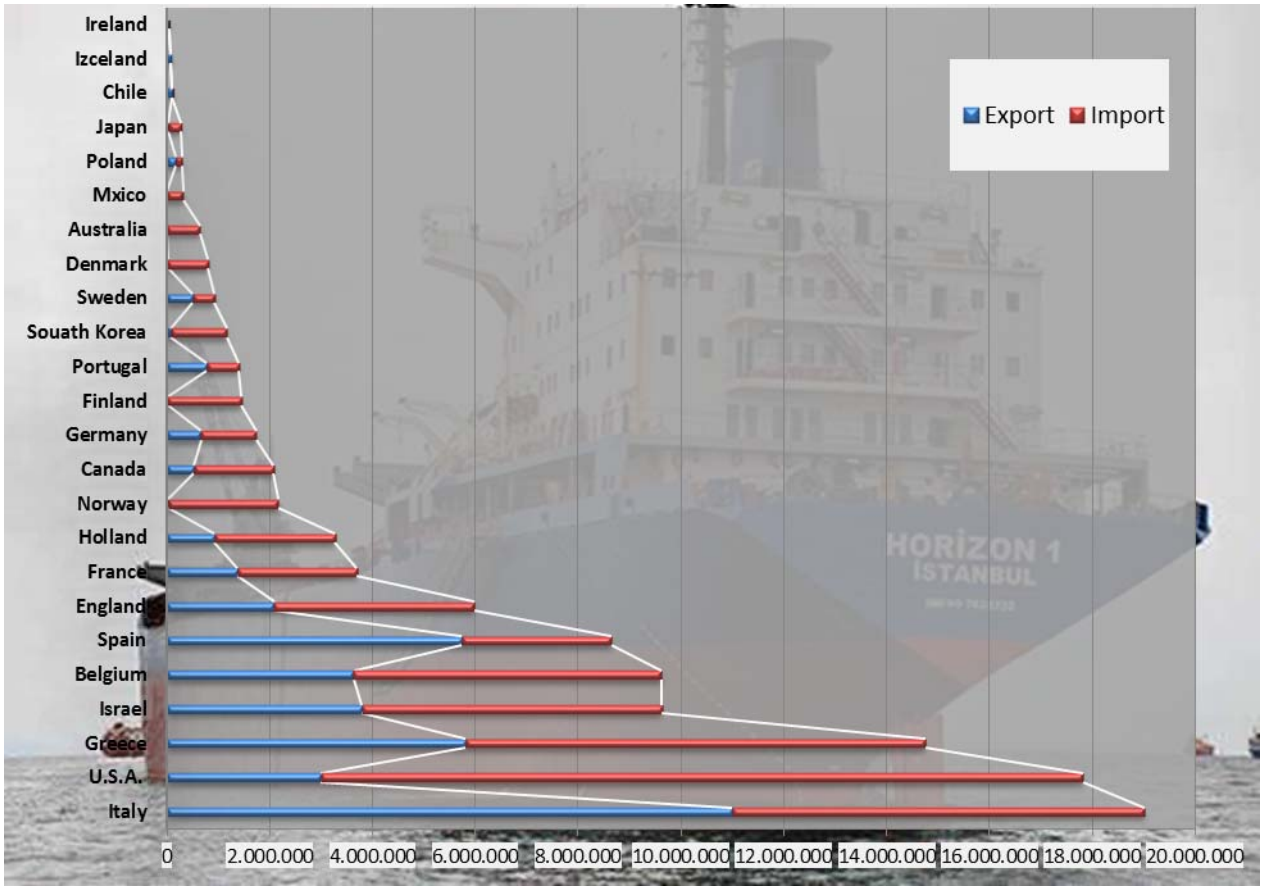
The seaborne trade share of the Turkish flag vessels was 10.9 % and foreign flag vessels' was 89.1%.

TABLE (34): Seaborne Trade to OECD Countries Tons (2014)

	UNLOADING				
	IMPORT				
OECD Country	Turkish Flag	Foreign Flag	Import Total	Transit Unloading	Total Unloading
U.S.A	1.012.380	13.801.871	14.814.251	79.427	14.893.678
Greece	871.543	8.070.996	8.942.539	393.735	9.336.274
Italy	3.387.461	4.626.414	8.013.875	266.106	8.279.981
Belgium	175.432	5.812.107	5.987.539	256.112	6.243.651
Israel	273.767	5.550.259	5.824.026	79.744	5.903.770
England	53.061	3.839.992	3.893.053	15.690	3.908.743
Spain	228.120	2.685.069	2.913.189	175.617	3.088.806
Holland	135.406	2.217.782	2.353.188	98.764	2.451.952
France	767.686	1.548.726	2.316.412	18.110	2.334.522
Norway	0	2.131.047	2.131.047	1.078	2.132.125
Canada	0	1.548.050	1.548.050	1.658	1.549.708
Finland	76.580	1.350.747	1.427.327	1.464	1.428.791
South Korea	21.979	1.068.547	1.090.526	45.752	1.136.278
Germany	6.755	1.056.659	1.063.414	19.044	1.082.458
Denmark	0	789.137	789.137	864	790.001
Australia	0	640.785	640.785	2.160	642.945
Portugal	45.395	575.017	620.412	100.382	720.794
Sweden	0	415.290	415.290	1.235	416.525
Mexico	0	301.343	301.343	132	301.475
Japan	64.077	181.021	245.098	32.642	277.740
Poland	16.413	106.010	122.423	3.350	125.773
Ireland	0	10.474	10.474	441	10.915
Chile	0	1.026	1.026	960	1.986
Iceland	0	0	0	0	0
Total	7.136.055	58.328.369	65.464.424	1.594.467	67.058.891

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

GRAPH (27): Seaborne Trade to OECD Countries (2014)



In the year 2014, 39 million tons of export and 51.6 million tons of import, totally 93.6 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 49.6 %, Spain with 10.7 %, Greece with 10.1 % shares.
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among EU countries are Greece with 17.2 %, Italy 15.3 % and Belgium 11.5 % shares.

TABLE (35): Seaborne Trade to EU Countries (mTon) (2014)

LOADING					
	EXPORT			TRANSIT LOADING	TOTAL LOADING
EU COUNTRY	TURKISH FLAGGED	FOREIGN FLAGGED	TOTAL		
ITALY	4.652.480	6.342.749	10.995.229	23.437.267	34.432.496
GREECE	622.524	5.186.916	5.809.440	1.182.737	6.992.177
SPAIN	755.728	4.980.825	5.736.553	1.693.538	7.430.091
MALTA	7.953	3.694.189	3.702.142	90.149	3.792.291
BELGIUM	34.214	3.595.714	3.629.928	128.798	3.758.726
ENGLAND	37.599	2.047.680	2.085.279	206.683	2.291.962
ROMANIA	346.998	1.370.129	1.717.127	38.567	1.755.694
FRANCE	547.687	830.919	1.378.606	1.520.531	2.899.137
THE NETHERLANDS	67.771	855.307	923.078	154.624	1.077.702
PORTUGAL	12.775	769.712	782.487	949.427	1.731.914
GERMANY	0	669.624	669.624	9.431	679.055
BULGARIA	408.782	218.785	627.567	419.281	1.046.848
SWEDEN	0	508.443	508.443	362	508.805
POLAND	8.000	167.158	175.158	789	175.947
SLOVENIA	58.574	58.131	116.705	4.500	121.205
CROATIA	4.781	78.281	83.062	510.000	593.062
IRELAND	0	32.313	32.313	676	32.989
FINLAND	0	23.753	23.753	1.562	25.315
LITHUANIA	0	19.904	19.904	389	20.293
DENMARK	0	19.885	19.885	777	20.662
LETONIA	0	2.900	2.900	105	3.005
ESTONIA	0	2.149	2.149	0	2.149
S. CPYRES	0	0	0	0	0
TOTAL	**7.218.868**	**30.105.337**	**37.324.205**	**30.311.626**	**67.635.831**

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

GRAPH (28): Seaborne Trade to EU Countries Tons (2014)

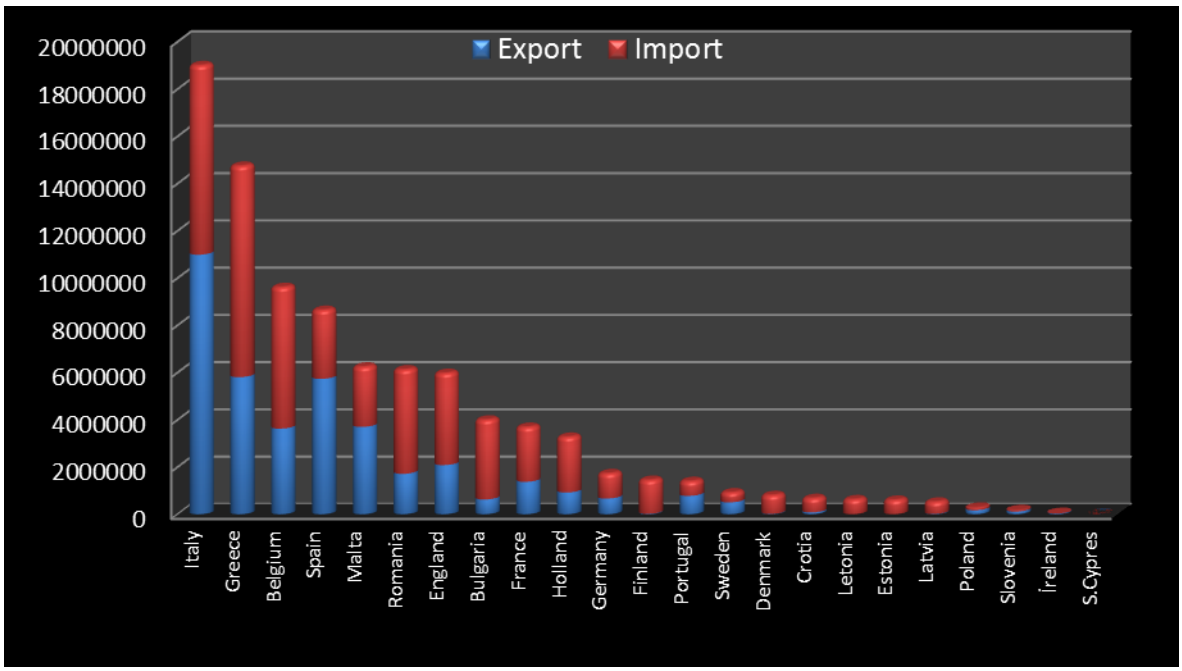


TABLE (36): Seaborne Trade to EU Countries (mTon) (2014)

EU COUNTRY	UNLOADING				
	IMPORT			TRANSIT UNLOADING	TOTAL UNLOADING
	TURKISH FLAGGED	FOREIGN FLAGGED	TOTAL		
GREECE	871.543	8.070.996	8.942.539	393.735	9.336.274
ITALY	3.387.461	4.626.414	8.013.875	266.106	8.279.981
BELGIUM	175.432	5.812.107	5.987.539	256.112	6.243.651
ROMANIA	1.208.160	3.203.526	4.411.686	661.088	5.072.774
ENGLAND	53.061	3.839.992	3.893.053	15.690	3.908.743
BULGARIA	940.331	2.435.576	3.375.907	423.789	3.799.696
SPAIN	228.120	2.685.069	2.913.189	175.617	3.088.806
MALTA	13.850	2.531.398	2.545.248	83.304	2.628.552
THE NETHERLANDS	135.406	2.217.782	2.353.188	98.764	2.451.952
FRANCE	767.686	1.548.726	2.316.412	18.110	2.334.522
FINLAND	76.580	1.350.747	1.427.327	1.464	1.428.791
GERMANY	6.755	1.056.659	1.063.414	19.044	1.082.458
DENMARK	0	789.137	789.137	864	790.001
LETONIA	11.555	618.854	630.409	240	630.649
PORTUGAL	45.395	575.017	620.412	100.382	720.794
ESTONIA	21.999	586.019	608.018	0	608.018
CROATIA	189.418	411.385	600.803	44	600.847
LITHUANIA	71.834	440.543	512.377	96	512.473
SWEDEN	0	415.290	415.290	1.235	416.525
POLAND	16.413	106.010	122.423	3.350	125.773
SLOVENIA	7.876	58.975	66.851	2.068	68.919
IRELAND	0	10.474	10.474	441	10.915
S.CYPRES	0	0	0	0	0
TOTAL	**8.228.875**	**43.390.696**	**51.619.571**	**2.521.543**	**54.141.114**

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

In the year 2014, 15.7 million tons of export and 66.3 million tons of import, totally 82 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 35.3 %, Russia with 25.5 %, Ukraine with 13.1 % shares.

TABLE (37): Seaborne Trade to BSEC Countries (Tons) 2014

	LOADING				
	EXPORT				
BSEC Country	**Turkish Flag**	**Foreign Flag**	**Total**	**Transit Loading**	**Total Loading**
Greece	622.524	5.186.916	5.809.440	1.182.737	6.992.177
Russia	452.714	3.767.136	4.219.850	830.920	5.050.770
Georgia	696.730	429.800	1.126.530	1.482.215	2.608.745
Ukraine	375.728	1.630.143	2.005.871	148.230	2.154.101
Romania	346.998	1.370.129	1.717.127	38.567	1.755.694
Bulgaria	408.782	218.785	627.567	419.281	1.046.848
Albania	16.669	129.843	146.512	0	146.512
Azerbaijan	0	16.386	16.386	4.893	21.279
Moldovia	6.000	10.181	16.181	0	16.181
Serbia	0	13.350	13.350	0	13.350
Total	**2.926.145**	**12.772.669**	**15.698.814**	**4.106.843**	**19.805.657**

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

GRAPH (29): Seaborne Trade and Transit Loading-Unloading to BSEC Countries

	Russia	Ukrania	Greece	Romania	Bulgaria	Georgia	Others
Seaborn Trade	34.793.884	19.549.999	14.751.979	6.128.813	4.003.474	2.300.752	487.569
Transit Loading-Unloading	1.160.277	410.251	1.576.472	699.655	843.070	1.819.542	4.955

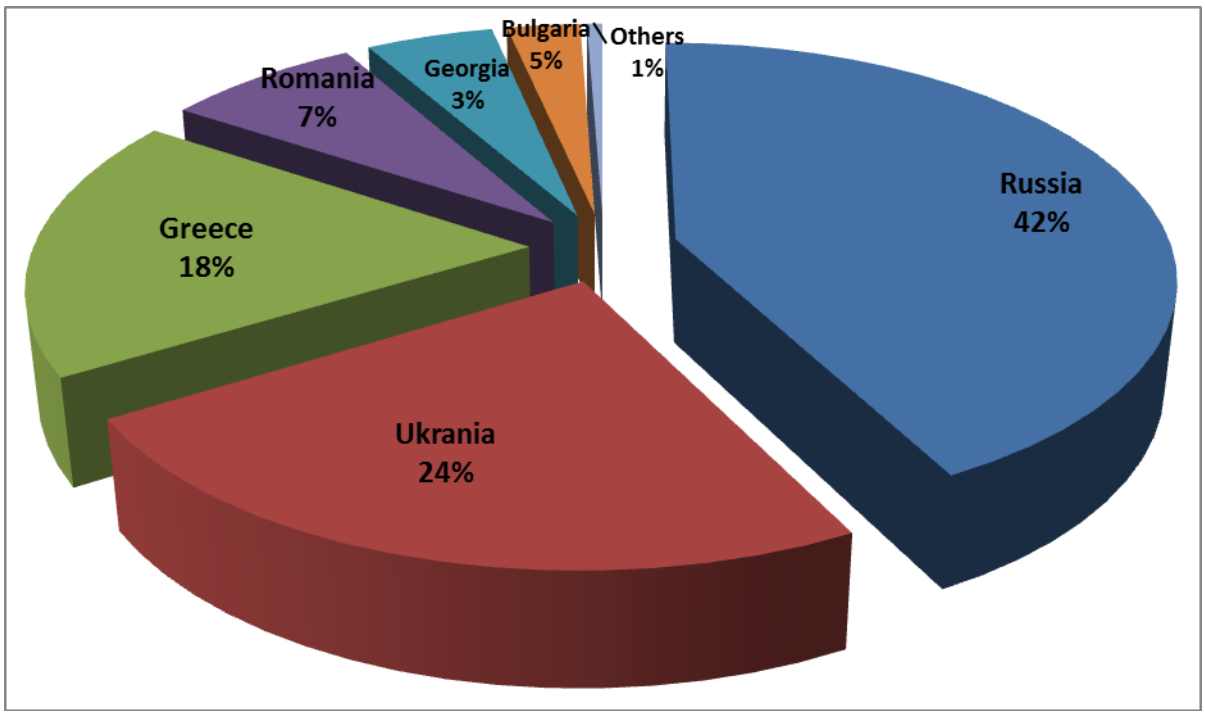
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among BSEC countries are Russia with 45 %, Ukraine with 26 % and Greece with 13.6 % shares.

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

	UNLOADING				
	IMPORT				
BSEC Country	Turkish Flag	Foreign Flag	Total	Transit Unloading	Total Unloading
Russia	2.883.372	27.690.662	30.574.034	329.357	30.903.391
Ukraine	3.674.763	13.869.365	17.544.128	262.021	17.806.149
Greece	871.543	8.070.996	8.942.539	393.735	9.336.274
Romania	1.208.160	3.203.526	4.411.686	661.088	5.072.774
Bulgaria	940.331	2.435.576	3.375.907	423.789	3.799.696
Georgia	496.434	677.788	1.174.222	337.327	1.511.549
Albania	62.927	113.300	176.227	0	176.227
Moldovia	25.502	73.764	99.266	62	99.328
Azerbaijan	0	19.647	19.647	0	19.647
Serbia	0	0	0	0	0
Total	10.163.032	56.154.624	66.317.656	2.407.379	68.725.035

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

GRAPH (30): Seaborne Trade to BSEC Countries Foreign Trade



World Container Fleet by Country of Domicile

The "country of domicile" examination (including container ships of 1.000 GRT and over) shows that at the beginning of 2014, 17.124.000 TEU of the container capacity was not registered in the country of domicile of the owner, but flagged out.

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

		National	Flag		Foreign	Flag		Total	Fleet	Controlled	
TEU Rank	Countries	No	1000 DWT	1000 TEU	No2	1000 DWT	1000 TEU	No3	1000 DWT 2	1000 TEU	Av. Age
1	Germany	236	14.310	1141	1.492	54.452	4.248	1.728	68.762	5.389	8,8
2	Denmark	99	8150	677	160	9.839	747	259	17.989	1.424	9,4
3	Greece	390	2359	193	316	15.304	1208	706	17.663	1.401	11,6
4	japan	1	100	9	307	15.947	1.302	308	16.047	1.311	7,7
5	Chine	191	6.360	464	205	7.466	605	396	13.826	1.069	13,7
6	Taiwan	26	1.138	86	218	10.540	849	244	11.678	935	10,2
7	Italy	2	68	5	164	11.687	917	166	11.755	922	14
8	Singapore	175	7812	617	63	2.478	190	238	10.290	807	10
9	Korea	87	1266	89	122	6.849	559	209	8.115	648	11,7
10	France	26	2300	192	72	4.735	388	98	7.035	580	8,1
11	Hong Kong	63	4610	395	18	577	45	81	5.187	440	10,6
12	Canada	1	15	1	72	4.946	411	73	4.961	412	6,8
13	Israel	5	294	24	37	2.409	191	42	2.703	215	7,8
14	Kuwait	3	281	24	24	2.210	190	27	2.491	214	8
15	England	21	1507	131	21	893	68	42	2.400	199	9,1
16	U.S.A.	20	798	58	55	1.636	121	75	2.434	179	19,7
17	Norway	1	3	0	33	1.430	119	34	1.433	119	9,3
18	Indonesia	158	1594	104	5	38	3	163	1.632	107	19,4
19	Chile	3	38	3	14	1.119	93	17	1.157	96	6
20	**Turkey**	**41**	**698**	**52**	**43**	**518**	**42**	**84**	**1.216**	**94**	**12,4**
World	Total	1.399	56.823	4497	3.704	159.447	12.627	5.103	216.270	17.124	10,9

Source: ISL May/June 2014

As regards the owner countries, German ship owners controlled by far the largest part of the world container fleet, namely 5.3 mill. TEU (1.728 container vessels) followed by Denmark 1.4 mill TEU (259 container vessels) and Greece 1.4 mill TEU (706 container vessels).

Container handling in Turkey in the years 2005 and 2014 are shown in Table 40 below on the basis of public and private sectors.

When the container transportations in 2014 is examined as cabotage, exports, imports and transit cargoes; on the basis of TEU, exports became 3.4 million TEU, imports 3.5 million TEU, cabotage loading-unloading 527.064 TEU and transit 754.238 TEU.

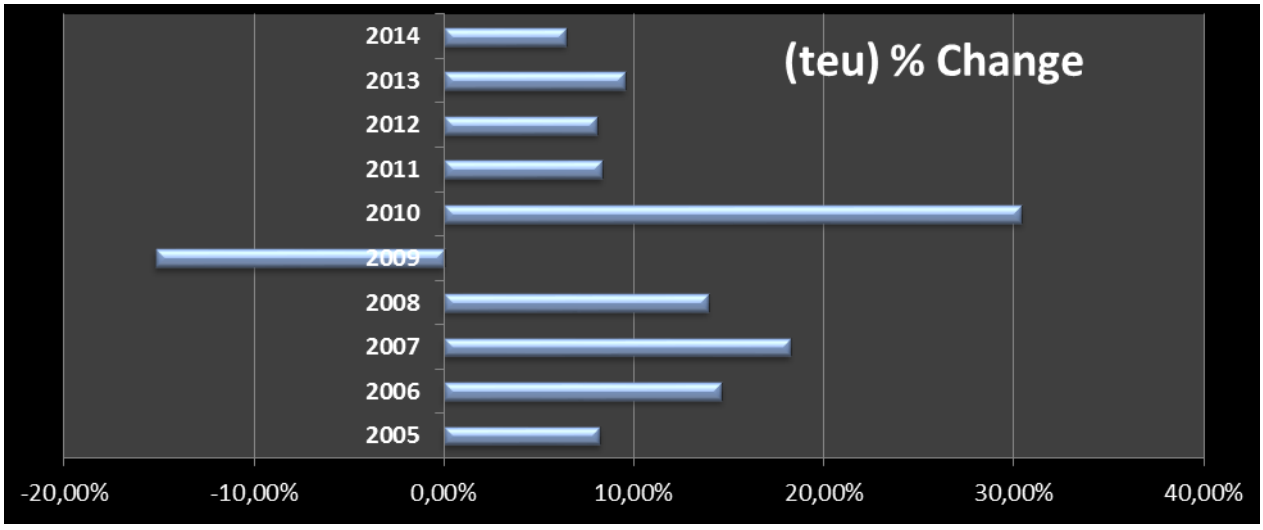
Transportation volume of Turkey's container transports by sea way was 3.3 million TEU in 2005; in 2014 it became 7.8 million TEU, at the same period imports cargoes increased to 3.5 million TEU from 1.5 million TEU and the exports cargoes increased to 3.4 million TEU when compared with 1.5 million TEU in 2005.

TABLE (40): Container Handling 2005-2014 (TEU)

	Loading (TEU)			Unloading (TEU)			Seaborne Foreign Trade			
Years	Cabotage	Export	Total	Cabotage2	Import	Total2	Foreign Trade	Transit	Total3	Change
2005	6.579	1.598.450	1.605.029	8.167	1.577.932	1.586.099	3.191.128	173.138	3.364.266	8,20%
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	18,20%
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%
2014 Container Handling 8.351.122 TEU										

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

Graph (31) Container Handling 2005-2014 (TEU)



According to the 2014 container loading and unloading / handling (TEU) chart of the Harbor Masters, in the ports operating under Ambarlı Harbor Master handled an amount of 1.718.246 TEU, the ports operating under Mersin Harbor Master handled a sum of 739.793 TEU and in the ports operating under Kocaeli Harbor Master handled a total of 444.467 TEU of containers.

TABLE (41) : Container Handling (TEU) 2014

	LOADING											
	Export			Cabotage Loading			Transit Loading			Total Loading		
Port	No	TEU	TON	No	TEU	TON	No	TEU	TON	No	TEU	TON
AMBARLI	739.889	1.201.475	11.107.706	82.996	117.021	771.556	272.161	399.750	4.931.139	1.095.046	1.718.246	16.810.401
MERSİN	459.295	721.090	8.202.488	12.311	18.597	185.271	76	106	1.631	471.682	739.793	8.389.390
KOCAELİ	264.971	421.938	4.308.462	16.224	21.452	89.852	897	1.076	14.854	282.092	444.467	4.413.168
GEMLİK	209.414	310.122	3.859.002	29.145	41.974	486.934	1.166	1.817	26.723	239.725	353.913	4.372.659
İZMİR	225.856	314.403	4.244.633	6.000	8.253	111.903	46	67	835	231.902	322.723	4.357.371
ALİAĞA	196.079	286.273	3.892.849	637	808	13.731	26	47	373	196.742	287.129	3.906.953
ANTALYA	83.869	89.486	2.088.986	4.073	4.707	85.656	0	0	0	87.942	94.193	2.174.642
İSKENDERUN	54.873	86.406	944.385	143	286	1.035	33	48	448	55.049	86.739	945.868
İSTANBUL	27.049	48.138	267.071	12.159	15.727	33.729	0	0	0	39.208	63.865	300.800
SAMSUN	6.974	7.314	180.616	15.146	17.078	318.661	0	0	0	22.120	24.392	499.277
BANDIRMA	4	7	73	11.814	11.993	288.450	0	0	0	11.818	12.000	288.523
TRABZON	858	1.299	10.655	6.952	7.816	164.115	0	0	0	7.810	9.115	174.770
TEKİRDAĞ	25	50	158	165	365	809	0	0	0	190	415	967
İNEBOLU	0	0	0	400	400	10.091	0	0	0	400	400	10.091
MARMARA A.	0	0	0	278	278	6.474	0	0	0	278	278	6.474
KARABİGA	0	0	0	222	242	585	0	0	0	222	242	585
BARTIN	4	7	39	0	0	0	0	0	0	4	7	39
TOPLAM	2.269.160	3.488.008	39.107.123	198.665	266.997	2.568.852	274.405	402.911	4.976.003	2.742.230	4.157.916	46.651.978

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

TABLE (42): Position at the 18 Ports- Unloading Container Handling (TEU) 2014

	UNLOADING											
	Import			Cabotage Unloading			Transit Unloading			Total Unloading		
Port	No	TEU	TON	No2	TEU3	TON4	No3	TEU6	TON7	No4	TEU9	TON10
AMBARLI	796.214	1.286.773	13.604.546	72.276	93.803	1.347.427	235.703	346.104	4.276.248	1.104.193	1.726.679	19.228.221
MERSİN	461.206	725.391	8.173.137	11.002	18.441	176.791	259	320	6.170	472.467	744.152	8.356.098
KOCAELİ	277.159	435.336	4.824.500	11.205	18.689	94.889	343	613	4.881	288.707	454.637	4.924.270
İZMİR	231.846	325.853	2.549.150	22.694	30.115	125.191	47	65	874	254.587	356.033	2.675.215
GEMLİK	197.675	296.330	2.034.799	39.493	56.621	366.617	908	1.501	21.399	238.076	354.452	2.422.815
ALİAĞA	165.988	241.257	1.392.109	5.410	7.832	16.836	155	300	2.139	171.553	249.390	1.411.084
İSKENDERUN	61.278	96.287	960.915	0	0	0	1.330	2.332	17.537	62.608	98.619	978.452
ANTALYA	85.291	90.457	452.480	3.790	4.190	18.892	46	92	256	89.127	94.739	471.628
İSTANBUL	38.409	61.326	710.789	4.308	6.271	78.888	0	0	0	42.717	67.597	789.677
SAMSUN	15.979	17.664	73.644	5.404	6.387	40.071	0	0	0	21.383	24.051	113.715
BANDIRMA	0	0	0	12.477	12.700	38.261	0	0	0	12.477	12.700	38.261
TRABZON	4.718	5.095	14.115	2.920	3.829	53.479	0	0	0	7.638	8.924	67.594
İNEBOLU	0	0	0	400	400	850	0	0	0	400	400	850
TEKİRDAĞ	21	42	217	145	326	3.173	0	0	0	166	368	3.390
MARMARA A.	0	0	0	250	250	538	0	0	0	250	250	538
KARABİGA	0	0	0	206	214	4.560	0	0	0	206	214	4.560
BARTIN	0	0	0	0	0	0	0	0	0	0	0	0
TOPLAM	2.335.784	3.581.811	34.790.401	191.980	260.068	2.366.463	238.791	351.327	4.329.504	2.766.555	4.193.206	41.486.368

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

As of 2014, the countries which Turkey performed foreign trade with / conducted transit container transportation are as follows: Egypt (16.3%), Greece (10.8%) and Belgium (7.6%). The data of the foreign trade / transit container transportation of top 35 countries are shown in the Table 43.

TABLE (43): Position at the 17 Country Container Foreign Trade Handling (TEU) 2014

	TEU				
Country	Export	Transit Loading	Import	Transit Unloading	Foreign Trade
Egypt	563.522	12.370	686.629	13.171	1.275.693
Greece	386.407	11.976	416.992	30.989	846.363
Belgium	266.709	13.526	295.649	22.073	597.956
Italy	295.966	12.831	199.281	15.854	523.932
Chine	266.282	25.983	157.079	56.899	506.243
Spain	265.087	10.384	123.052	10.201	408.725
Malta	142.749	143	227.199	156	370.247
Israel	160.053	4.621	194.921	1.344	360.938
Russian	129.124	66.833	138.940	20.041	354.937
George	62.369	123.514	135.043	25.048	345.973
Malaysia	25.183	1.771	212.936	2.277	242.167
Lebanon	74.943	1.092	161.314	239	237.588
Romania	90.106	2.887	49.359	53.216	195.568
England	126.442	5.581	32.872	1.372	166.267
Libya	57.859	4.761	91.872	368	154.859
Ukrainian	61.612	11.742	57.991	17.213	148.558
Bulgaria	36.682	32.420	40.028	33.018	142.148
Portugal	52.181	4.835	36.532	8.730	102.278
U.S.A.	38.092	5.032	42.335	5.019	90.478
United Arab Emirates	69.829	9.012	4.609	125	83.575
Germany	53.073	641	19.888	1.366	74.968
Algeria	26.273	6.265	39.033	588	72.159
Saudi Arabia	62.930	2.319	3.422	634	69.305
Korea	4.302	874	52.038	3.533	60.747
Singapore	16.612	1.546	39.741	1.413	59.312
France	40.868	397	9.964	1.536	52.765
Syria	12.229	7	39.313	92	51.641
Tunis	19.027	5.859	16.364	838	42.088
Indian	16.894	5.045	11.260	3.823	37.022
N. Cyprus	15.682	1.964	15.013	94	32.753
Holland	9.105	1.059	9.582	8.692	28.438
Morocco	4.072	796	7.756	172	12.796
Equator	10.276	568	538	937	12.319
Sri Lanka	7.256	672	28	30	7.986
Slovenia	3.159	324	3.062	162	6.707
Other	15.054	13.261	10.180	10.064	48.559
Total	**3.488.008**	**402.911**	**3.581.811**	**351.327**	**7.824.057**

Vehicle Transportation through Ro-Ro Lines

Ro-Ro lines of Turkey in 2008-2014 are shown below.
Table 44 above shows the amounts of the transported full vehicles (export and import) in the years 2008-2014.

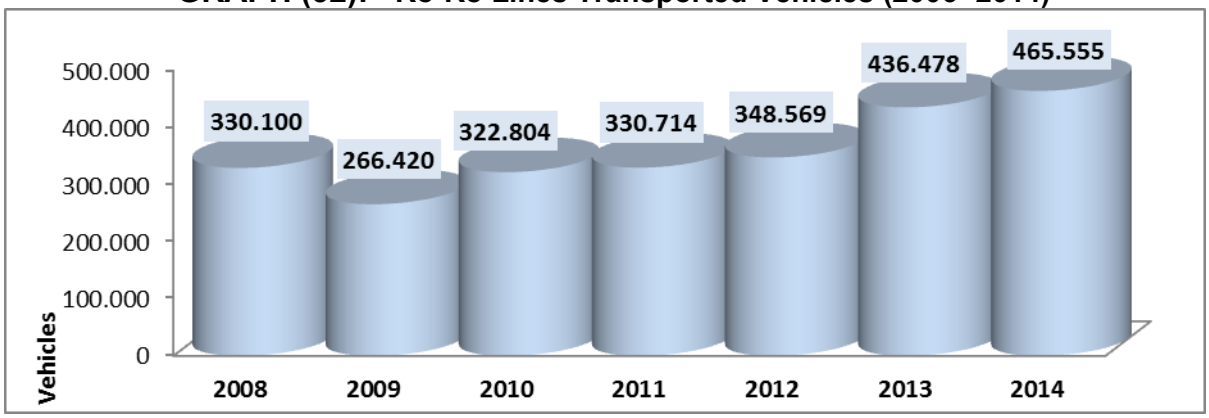
TABLE (44): Ro-Ro Lines Transported Vehicles (2008- 2014)

Region	Ro-Ro Lines	2008	2009	2010	2011	2012	2013	2014
Marmara	Pendik/Haydarpaşa-Trieste	149,062	111,401	116,815	139.270	121.742	167.201	175.117
	Haydarpaşa-İlyıcheysky	0	0	0	0	0	18.343	34.945
	Derince-Poti	0	0	0	0	0	646	1.571
	Ambarlı-Trieste	39,998	30,372	37,627	18.017	15.618	7.595	0
	Ambarlı-Toulen				0	37.505	14.893	0
	Pendik/Haydarpaşa-Marseille	0	0	7480	2.130	0	0	0
	Tekirdağ-Toulon	0	0	9269	0	0	0	0
	Haydarpaşa-Odessa	0	0	0	0	0	0	0
	Haydarpaşa-Yuzhny	0	0	0	0	0	0	0
	Tekirdağ-Trieste	0	0	0	0	0	1.466	1.067
	Tuzla-Toulen	0	0	0	0	0	0	43.305
	Regional Total	**189060**	**141,773**	**171,191**	**159.417**	**174.865**	**210.144**	**256.005**
Mediterranean	Taşucu-Girne	32,305	31,032	36,071	36.316	34.168	34.153	34.497
	Taşucu-Tripoli	0	0	0	0	0	8.292	8.613
	Taşucu-Tartous	0	0	0	0	0	5.437	3.026
	Mersin-Magosa	23,766	19,966	19,107	18.275	14.669	18.901	22.138
	Mersin-Trieste	0	12019	28,571	37.093	39.748	34.848	35.849
	İskenderun-Port Said	0	0	0	0	5.673	6.146	5.463
	İskenderun - Haifa	0	0	0	0	0	3.194	2.287
	Mersin-Damıetta	0	0	0	0	0	7.071	0
	Mersin-İskenderiye	0	0	0	253	790	638	1.607
	Regional Total	**56,071**	**63,017**	**84,638**	**91.937**	**95.048**	**118.680**	**113.480**
Aegean	Çeşme-Trieste	30,039	24,808	27,179	43.058	44.106	45.764	47.797
	İzmir-Dedeağaç	0	0	0	0	0	0	0
	Regional Total	**30,039**	**24,808**	**27,179**	**43.058**	**44.106**	**45.764**	**47.797**
Black Sea	Zonguldak-Yevpatoria	23,632	20,476	19,573	23.540	25.126	27.007	5.378
	Zonguldak Sevastopol	0	0	0	0	0	4.477	2.246
	Zonguldak-Skodovsk	0	0	0	0	0	8.001	438
	Zonguldak-Ilyichevsky	0	0	0	0	0	2	11.110
	Samsun-Novorossisky	21,148	9280	15,145	10.742	7.670	14.682	16.491
	Samsun-Kavkaz	0	0	0	1.383	1.236	895	662
	Samsun - Tuapse	0	0	0	0	0	2.964	4.687
	Samsun-Gelincik	0	0	0	0	0	3.634	6.821
	Trabzon-Sochi	10150	7,066	5,078	637	518	228	440
	Pize-Poti	0	0	0	0	0	0	0
	Regional Total	**54930**	**36,822**	**39,796**	**36.302**	**34.550**	**61.890**	**48.273**
Grand	**Total**	330.100	266.420	322.804	**330.714**	**348.569**	**436.478**	**465.555**

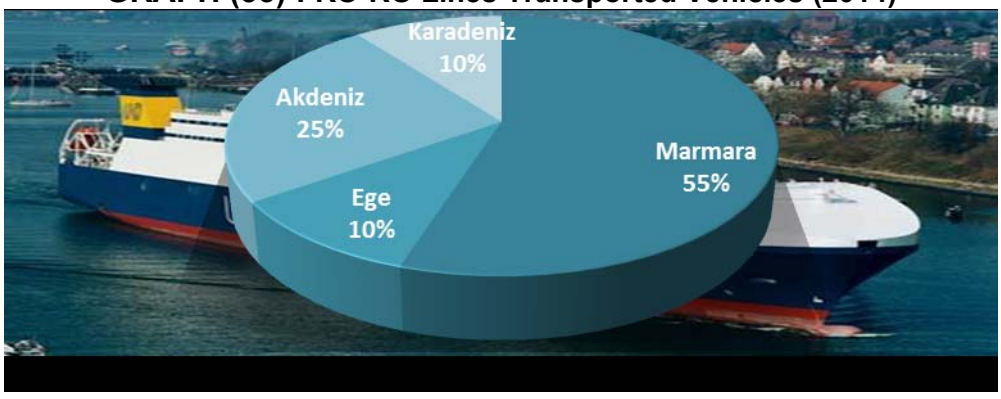
***Source:** Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

In The Black Sea region; 5.378 vehicles on Zonguldak-Yevpatoria line, 16.491 vehicles on Samsun-Novorossiysk line, 438 vehicles on Zonguldak-Skodovsk line, 2.246 vehicles on Zonguldak- Sevastopol line, 6.821 vehicles on Samsun Gelincik line, 4.687 vehicles on Samsun Tuapse line, 662 vehicles on Samsun-Kavkaz line, 440 vehicles on Trabzon-Sochi and 11.110 vehicles on Zonguldak –Iıyichevsky line, totally regional 47.273 vehicles have been transported in 2014.
In The Marmara Sea region; 34.945 vehicles have been carried on Haydarpaşa-Iıyıcheysky line, 175.117 vehicles on Pendik/Haydarpaşa-Trieste line, 43.305 vehicles on Tuzla-Toulen line, 1.067 vehicles on Tekirdağ-Trieste line, and 1.571 vehicles on Derince-Poti line, totally regional 256.005 vehicles have been transported in 2014.
In The Aegean Sea region; 47.797 vehicles have been carried on Esme-**Trieste line**, totally regional 47.797 vehicles have been transported in 2014.
In The Mediterranean region; 34.497 vehicles have been carried on Taşucu-Girne line, 22.138 vehicles have been carried on Mersin-Magosa line, 35.849 vehicles have been carried on Mersin-Trieste line, 8.613 vehicles have been on Taşucu-Tripoli line, 5.463 vehicles have been carried on İskenderun-Port Said line, 3.026 vehicles have been carried on Taşucu-Tartous line, 2.287 vehicles have been carried on İskenderun-Haifa line, 1.607 vehicles have been carried on Mersin-Iskenderiye line, totally regional 113.480 vehicles have been transported in 2014.

GRAPH (32): Ro-Ro Lines Transported Vehicles (2006- 2014)



GRAPH (33) : RO-RO Lines Transported Vehicles (2014)



The majority of the transported vehicles by Regions are, 55 % the Sea of Marmara Region, 10 % Black Sea Region, 25 % Mediterranean Region and 10 % The Aegean Sea Region in 2014.

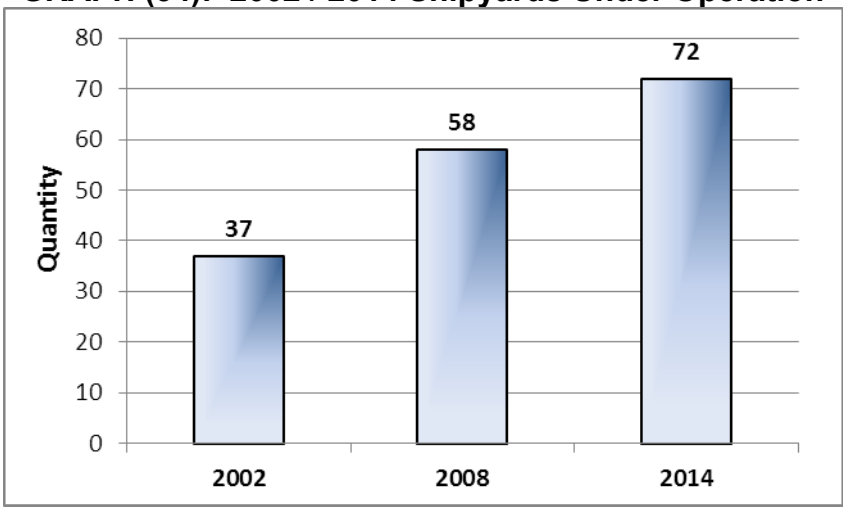
CHAPTER III

SHIPBUILDING INDUSTRY

General Outlook of Turkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, under operation raised up to 72 as of January 2015 while it was just only 37 in 2002. The quantity of shipyards under construction are 49 by the end of 2014.

GRAPH (34): 2002 / 2014 Shipyards Under Operation



Source: Ministry of Transport, Maritime Affairs and Communications

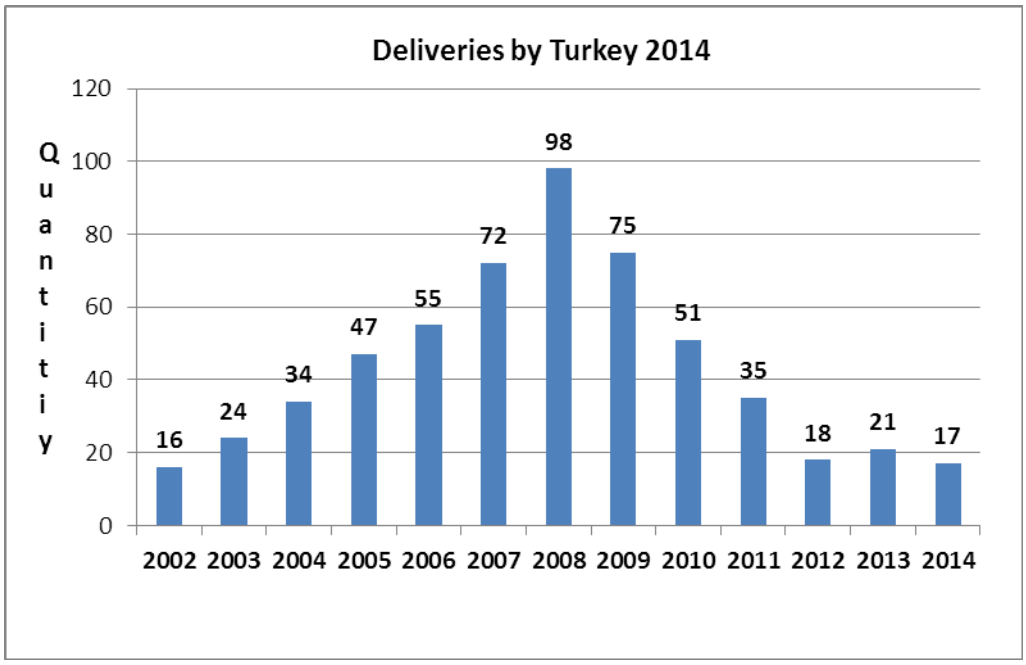
Shipbuilding industry is a branch of heavy industry which provides;

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

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

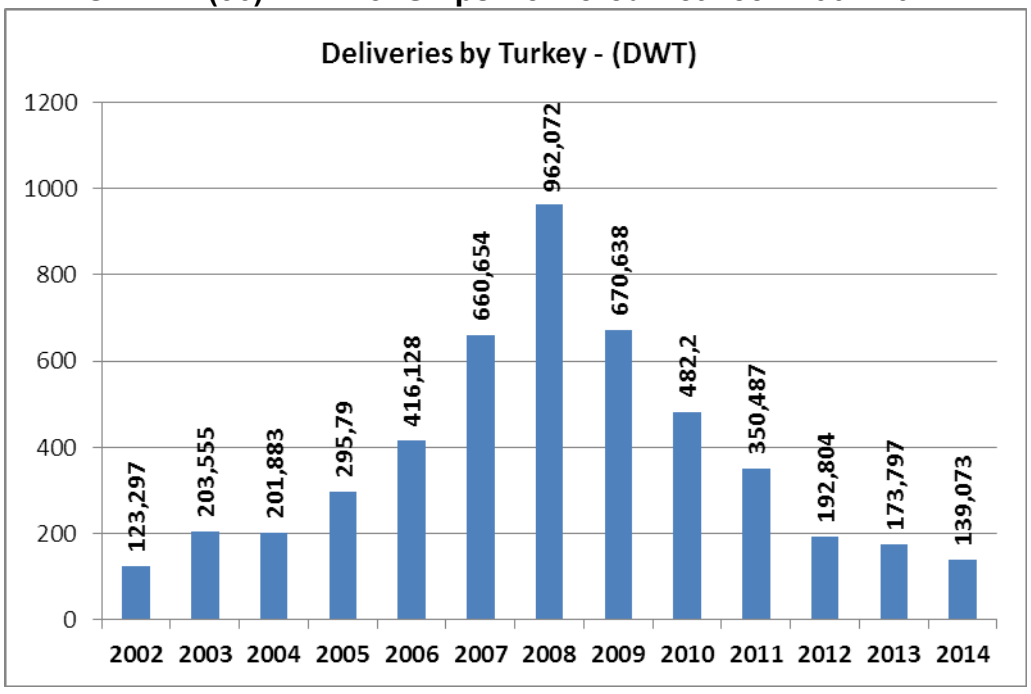
In 2014, 17 ships DWT of 139,073 tons had been delivered.

GRAPH (35): Number of Ships Delivered Between 2002-2014



Source: Clarkson Research Services 03/2015

GRAPH (36): DWT of Ships Delivered Between 2002-2014

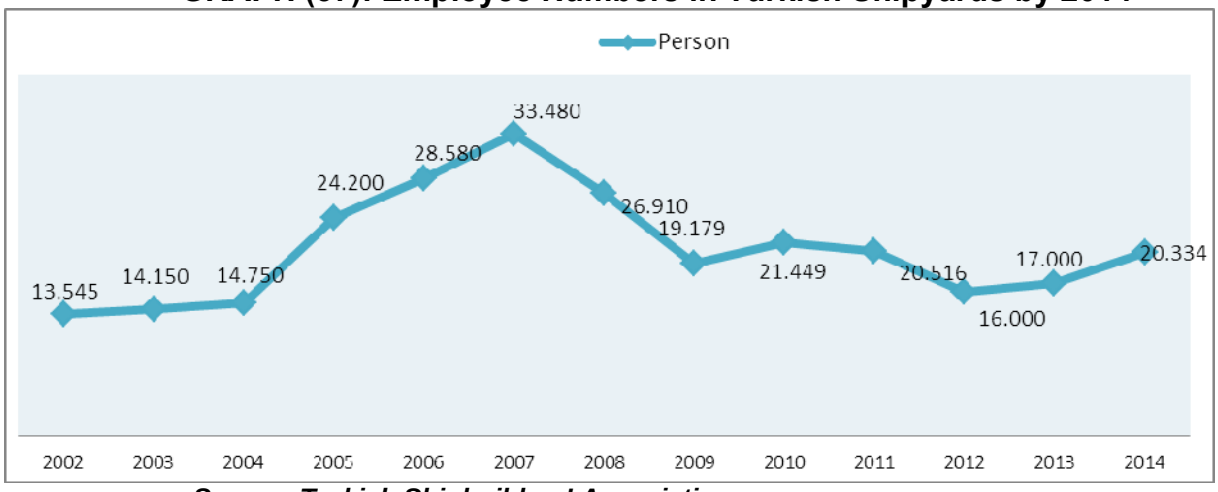


Source: Clarkson Research Services 03/2015

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

GRAPH (37): Employee Numbers in Turkish Shipyards by 2014



Source: Turkish Shipbuilders' Association

TABLE (45): Shipyards Distribution According to Cities

Shipyards Under Operation		Shipyards Under Construction	
İstanbul	27	Yalova	17
Yalova	22	Ordu	1
Trabzon	1	Samsun	8
Ordu	1	Kastamonu	3
Samsun	1	Çanakkale	6
Kastamonu	1	Adana	1
Zonguldak	8	Mersin	1
Sakarya	1	Balıkesir	2
İzmit	6	Sinop	1
Çanakkale	2	Zonguldak	3
Hatay	1	Trabzon	1
Adana	1	İstanbul	5
TOTAL	72	TOTAL	49

Source: Ministry of Transport, Maritime Affairs and Communications

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

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

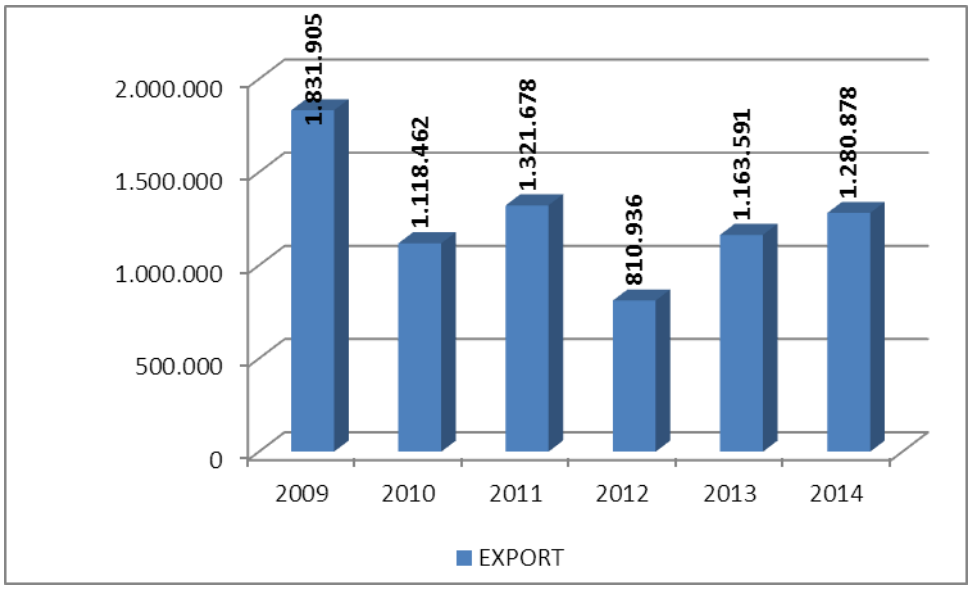
By the end of 2012, orders in our yards was decreased to 0, 5 Million DWT. Due to lack of new orders, the shipyards are now mostly concern with repair and maintenance facilities. In 2013 in Turkish shipyards 15.755.206 DWT of repair and maintenance had been done. As of 2014, it is estimated as 20.000.000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

TABLE (46): Repair and Maintenance Facilities According To Regions

NO	REGION	REPAIR/MAINTENANVCE (Ship Quantity)
1	TUZLA	1203
2	YALOVA	406
3	TRABZON	87
4	BALIKESİR	30
5	BURSA	28
6	KASTAMONU	22
7	ORDU	10
8	HATAY	9
9	ÇANAKKALE	6
10	İZMİT	0
11	ZONGULDAK	0
12	ADANA	0
13	SAKARYA	0
14	SAMSUN	0
15	MERSİN	0

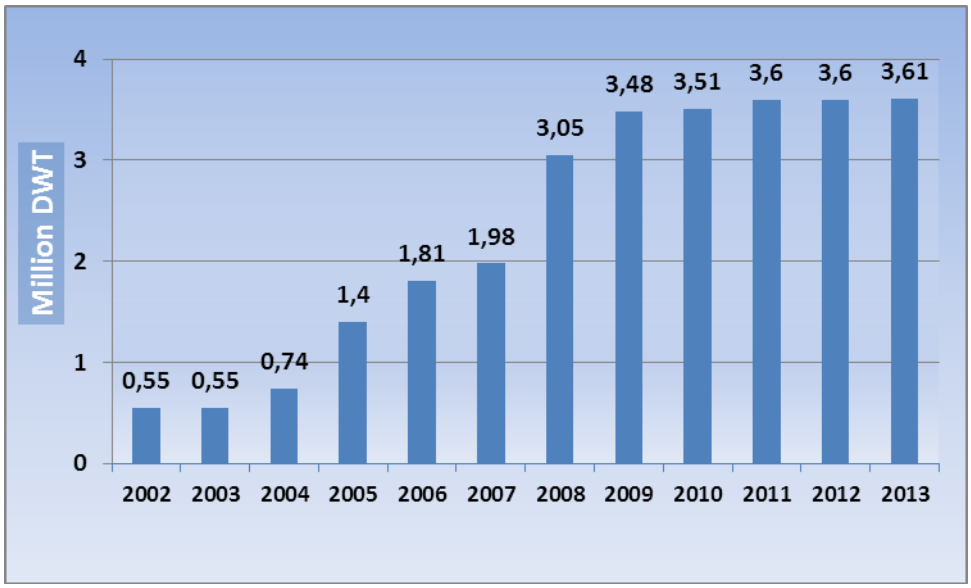
Source: Deniz Ticareti Magazine January 2015

GRAPH (38): Export Figures of Turkish Shipbuilding Industry (2009-2014)



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

GRAPH (39): Shipyards Project Capacities between 2002-2012



Source: Ministry of Transport, Maritime Affairs and Communications

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

As of December 2014, 24 floating docks, 6 dry docks and 1 syncrolift dock are operative in Turkey.

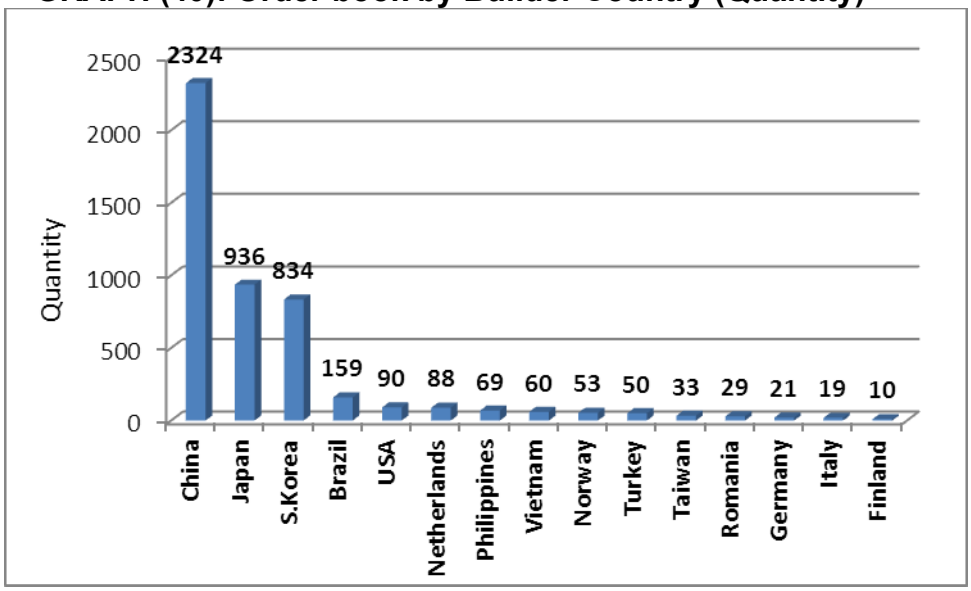
TABLE (47): Repair and Maintenance Facilities According To Regions

NO	Shipyard Name	Dock Details
1	ERKAL Uluslararası Nakliyat ve Ticaret A.Ş.	350x80 M 100.000 T
2	GEMSAN Gemi ve Gemi İşlet. San. Ve Tic. Ltd. Şti.	230 X 45 M 20.000 T
3	HİDRODİNAMİK Gemi San. ve Tic. A.Ş.	115X22 M 2.750 T
4	GEMAK Gemi İnşaat Sanayi ve TİC.A.Ş.	233 X 37 M
5		170X26 M
6	DESAN Deniz İnşaat Sanayi A.Ş.	230 X 40 M
7		186X27 M
8	İSTANBUL Denizcilik Gemi İnşa San. ve Tic. A.Ş.	93 X 28 M 4.200 T
9	DENİZ ENDÜSTRİSİ A.Ş.	210X37 M KURU
10	SEDEF Gemi İnşaatı A.Ş.	315X50 M KURU
11	TUZLA GEMİ Endüstrisi A.Ş.	300 X 53 M KURU
12	DEARSAN Gemi İnşaat Sanayi A.Ş.	67 X 28 M 2500 T
13	TORLAK Denizcilik Sanayi ve Tic. A.Ş.	195X40 M 40.000 DWT

14	YARDIMCI Gemi İnşa A.Ş.	155X36 M 8.500 T
15	ÇEKSAN Gemi İnşa San. Ve Tic. A.Ş.	130X29 M 7.000 T
16	DENTAŞ İnşaat ve Onarım San. A.Ş.	128X30 M 5.000 T
17	ÇINDEMİR Mak. Gemi Onarım ve Tersanecilik A.Ş.	118X28 M 5.000 T
18	DALSAN Liman İnş. Tarama, Gemicilik San.	82 X 27 M 3.700 T
19	UZMAR Gemi Yapım Sanayi A.Ş.	67 X 37 M 5000 T
20	BEŞİKTAŞ Gemi İnşa A.Ş.	230 X 40 M 50.000 DWT KURU
21		227X35 M 16.500 T
22		227X35 M 16.500 T
23	SEFİNE Denizcilik Tersanecilik Tur. San. ve Tic. Ltd. Şti.	240 X 42 M KURU
24	TERSAN Tersanecilik San. Ve Tic. A.S.	178X35 M 9000 T
25	HATSAN İnş. M.T. Gemi İnşa ve Deniz San. ve Tic. A.Ş.	180X30 M
26	İSTER İsken. Liman ve Tersane İşlet. Ltd. Şti.	42 X 22 M 1400 T SENKROLİFT
27	TERSAN TERSANECİLİK VE TAŞIMACILIK AŞ.	130X30 M 7.100 T
28	URSA GEMİCİLİK BAKIM ONARIM TERSANECİLİK SAN.VE TİC.A.S	56X14 M KURU
29	PROTEKSAN TURKUAZ YAT SANAYİ A.Ş	54X20 M 1.100 T
30	İNEBOLU Tersanecilik Sanayi ve Ticaret A.Ş.	117 X 20 M 4500DWT
31	YATCHLEY Gemi Yapım San. ve Tic. A.Ş.	150X20 M

Source:Deniz Ticareti Magazine January 2015

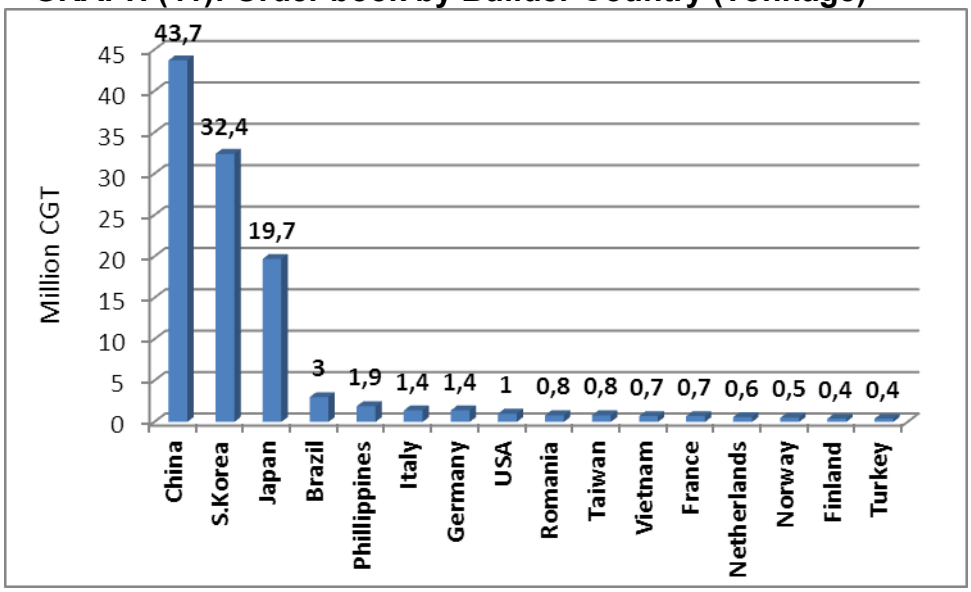
GRAPH (40): Order book by Builder Country (Quantity)



Source: Clarkson Research Services 03/2015

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

GRAPH (41): Order book by Builder Country (Tonnage)

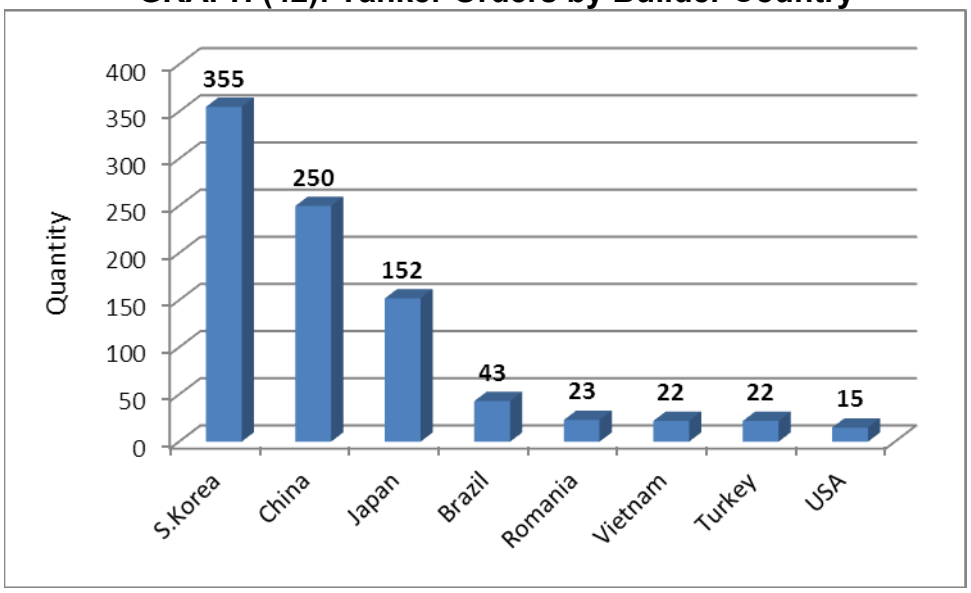


Source: Clarkson Research Services 03/2015

Turkish yards are in the 16th place of world order book ranking list according to tonnage basis in CGT.

Our shipyards have a good reputation in building of small and medium tonnage chemical tankers. By March 2015, Turkey was in the 7th place among the countries which takes tanker orders.

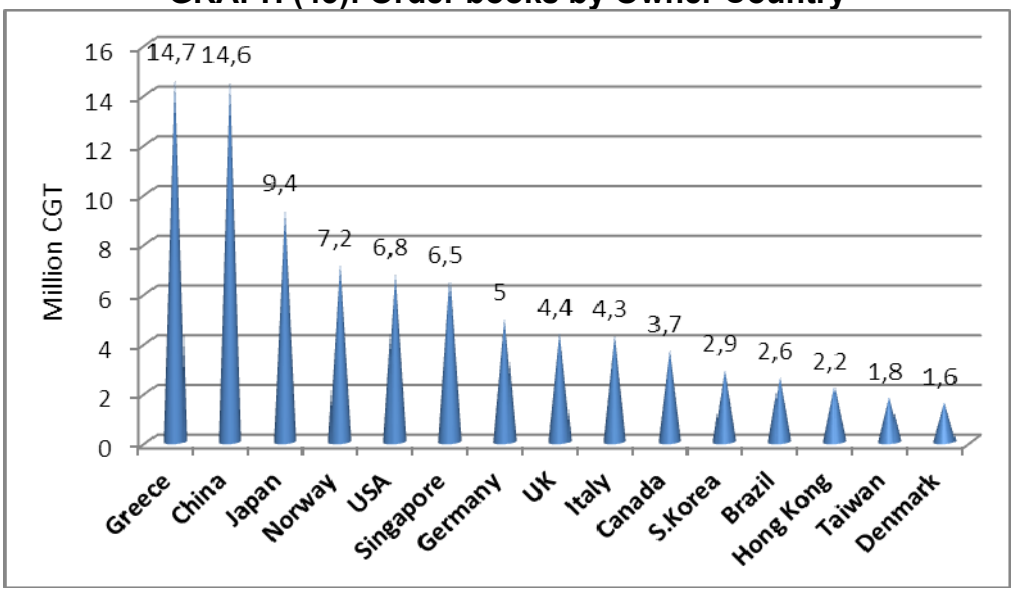
GRAPH (42): Tanker Orders by Builder Country



Source: Clarkson Research Services 03/2015

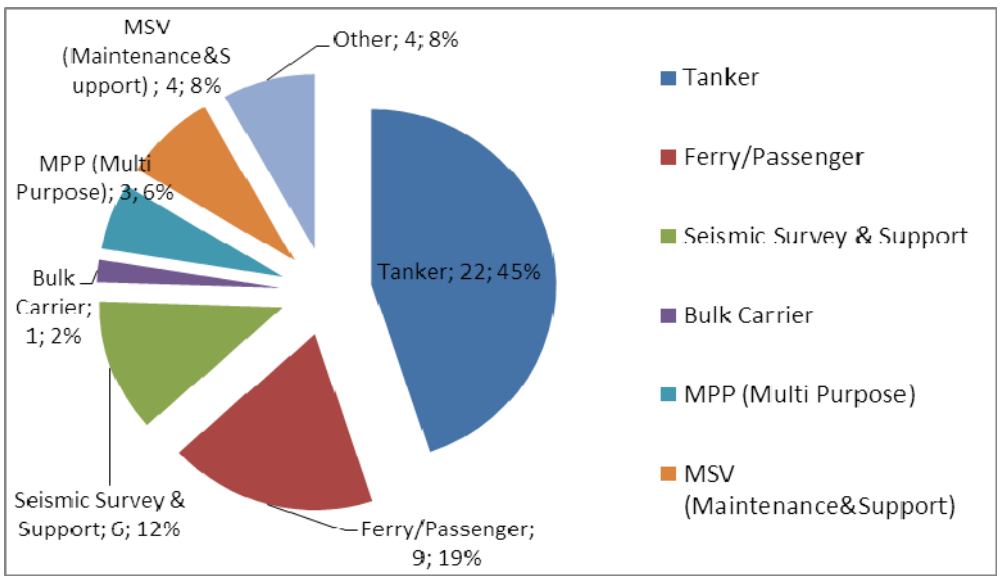
Turkish ship-owners worldwide orders consist of 49 ships about 2, 65 million DWT as of March 2015.

GRAPH (43): Order books by Owner Country



Source: Clarkson Research Services 03/2015

GRAPH (44): Distribution of Orders According to Ship Type



Source: Clarkson Research Services 03/2015

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

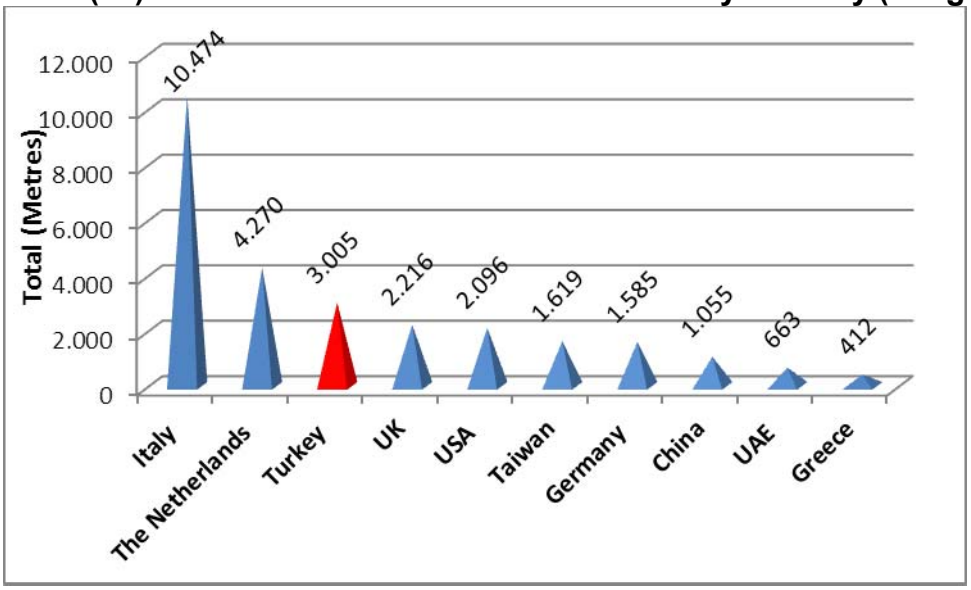
Main disadvantages are;

- 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 in the 3rd place with 25 superyachts with the total length of 968 meters which equals to 11, 20% of market share.

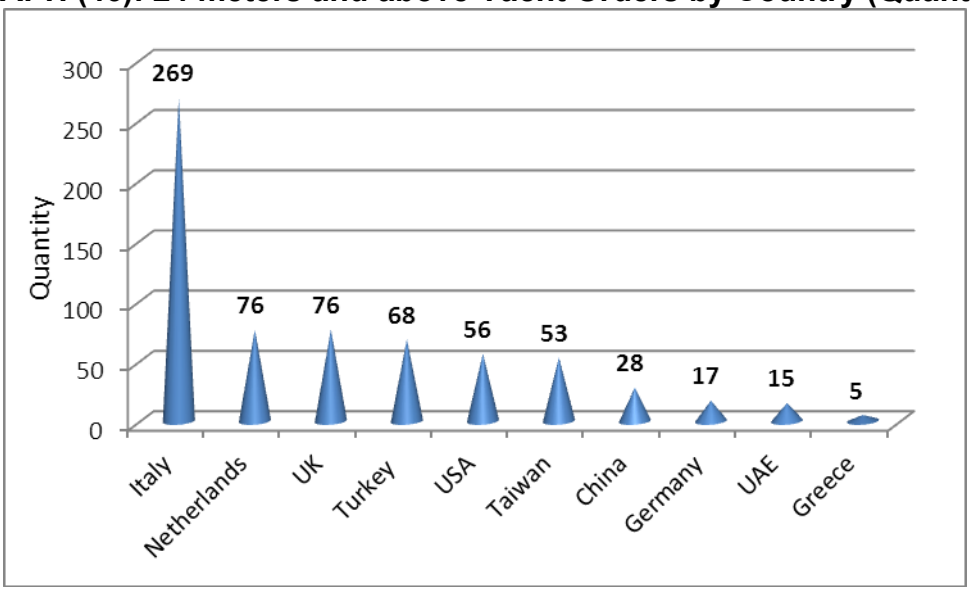
Turkey is keeping the third place in global order book by 68 superyachts with the total length of 3005 meters by the end of 2014.

GRAPH (45): 24 meters and above Yacht Orders by Country (Length)



Source: Boat International (www.boatinternational.com/gob)

GRAPH (46): 24 meters and above Yacht Orders by Country (Quantity)



Source: Boat International (www.boatinternational.com/gob)

Sub- Industry

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

Turkish sub-industry regarded as one of the best in supplying anchor, chain, bollard, electric cables, 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 (48): Order book of Turkish Shipyards as of March 2015

No	Hull	Type	Dwt	GRT	Size	Unit	CGT	Delivery	Yard	Yard Status	Contract Date	Current Owner
1	1056	CChem & Oil	6,366	4,696	6,366	DWT	8,785	2016-06	Tersan Shipyard	Established 2000-10	01.01.2015	Gefo Gesellschaft
2	N/A	Pass/Car F.	400	2	199	Passengers	4,413	2016-06	Ada Shipyard	Greenfield	30.01.2015	Fjord1 AS
3	N/A	Pass/Car F.	400	2	199	Passengers	4,413	2016-08	Ada Shipyard	Greenfield	30.01.2015	Fjord1 AS
4	NB 46	Pass/Car F.		8	600	Passengers	11,809	2016-12	Cemre Shipyard	Established >2010	31.12.2014	Torghatten ASA
5	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-	Armada Shipyard	Established 2000-10	18.09.2013	Palmali Shipping
6	13	MPP	6,5	4,6	6,5	DWT	5,964	2015-01	Karadeniz Shipyd.	Established <2000	01.01.2008	Kanlar Denizcilik
7	NB28	Pass/Car F.		8	600	Passengers	11,809	2016-09	Sefine Shipyard	Established 2000-10	31.12.2014	Torghatten ASA
8	NB29	Pass/Car F.		8	600	Passengers	11,809	2016-12	Sefine Shipyard	Established 2000-10	31.12.2014	Torghatten ASA
9	H70	PSV	4		4	DWT	6,716	2016-06	Selah Shipyard	Established <2000	01.01.2014	Marnavi
10	75	MSV		4	99	LOA	7,871	2016-03	Besiktas Shipyard	Established 2000-10	01.06.2014	Mikkel Myklebusthaug
11	N/A	Pass/Car F.	6,75	10		Passengers	13,837	2016-06	Sedef Gemi (Tuzla)	Established <2000	19.11.2014	Seaspan
12	N/A	Pass/Car F.	6,75	10		Passengers	13,837	2016-10	Sedef Gemi (Tuzla)	Established <2000	19.11.2014	Seaspan
13	60	Asp.& Bit.	15,1		15,1	DWT	12,679	2016-	Besiktas Shipyard	Established 2000-10	06.11.2014	Le Groupe Desgagnes
14	61	Asp.& Bit.	15,1		15,1	DWT	12,679	2016-	Besiktas Shipyard	Established 2000-10	06.11.2014	Le Groupe Desgagnes
15	NB26	Pass/Car F.		7,5	600	Passengers	11,28	2016-07	Sefine Shipyard	Established 2000-10	15.10.2014	Port of Tallinn
16	NB27	Pass/Car F.		7,5	600	Passengers	11,28	2016-08	Sefine Shipyard	Established 2000-10	15.10.2014	Port of Tallinn
17	1063	MSV	6,639	1,26	129	LOA	3,846	2015-12	Tersan Shipyard	Established 2000-10	04.07.2013	Volstad Shipping
18	1068	PSV	4,5		4,5	DWT	7,226	2016-05	Tersan Shipyard	Established 2000-10	07.08.2014	Tidewater Marine
19	79	Products	7,15	4,684	7,15	DWT	5,936	2015-04	Yardimci Deniz	Established <2000	01.06.2013	BMZ Group
20	H69	PSV	4		4	DWT	6,716	2016-03	Selah Shipyard	Established <2000	01.01.2014	Marnavi
21	N/A	MSV	4,3		90	LOA	8,705	2015-04	Selah Shipyard	Established <2000	21.04.2014	Marnavi
22	14	MSV	2,15	4,202	88	LOA	8,115	2015-08	Sefine Shipyard	Established 2000-10	13.05.2013	DGCS
23	N/A	Ore/Oil	8,05	5,795	8,05	DWT	7,106	2015-	Gelibolu Shipyd	Established <2000	01.09.2011	Albros Shipping
24	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-05	Turkter-Tersane	Established 2000-10	23.12.2013	Palmali Shipping
25	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-08	Turkter-Tersane	Established 2000-10	23.12.2013	Palmali Shipping

26	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-11	Turkter-Tersane	Established 2000-10	23.12.2013	Palmali Shipping
27	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2016-01	Turkter-Tersane	Established 2000-10	23.12.2013	Palmali Shipping
28	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2016-03	Armada Shipyard	Established 2000-10	23.12.2013	Palmali Shipping
29	16	Products	3,9	3,09	3,9	DWT	4,683	2015-01	Cimtas Module & S/Y	Established >2010	01.01.2011	Nakkas Denizcilik
30	11	Products	1,5	800	1,5	DWT	2,168	2015-02	Akdeniz Gemi	Established >2010	01.01.2012	Unknown
31	12	Chem & Oil	3,8		3,8	DWT	5,937	2015-01	Duzgit Yalova	Established >2010	01.01.2012	Duzgit Group
32	47	Bulk	13	7	13	DWT	6,426	2015-	Gisan Shipyard	Established <2000	01.01.2008	Unknown
33	93	Asp.& Bit.	19,995	15,5	19,995	DWT	16,942	2015-02	RMK Marine Shipyard	Established 2000-10	01.01.2013	Ditas-Denizcilik
34	31	Seis. Survey		5	86	LOA	9,039	2015-04	Istanbul S.Y.	Established <2000	24.04.2012	Govt of Turkey
35	N/A	Seis. Support				LOA	2,527	2015-06	Cemre Shipyard	Established >2010	24.10.2013	Norfield Shipping
36	N/A	Seis. Support			70	LOA	3,549	2015-06	Cemre Shipyard	Established >2010	24.10.2013	Norfield Shipping
37	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-	Armada Shipyard	Established 2000-10	18.09.2013	Palmali Shipping
38	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-	Armada Shipyard	Established 2000-10	18.09.2013	Palmali Shipping
39	N/A	Chem & Oil	7,114		7,114	DWT	8,381	2015-	Armada Shipyard	Established 2000-10	18.09.2013	Palmali Shipping
40	36	Seis. Support	1,75	2,072	64	LOA	5,235	2015-07	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
41	35	Seis. Support	1,75	2,072	64	LOA	5,235	2015-06	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
42	34	Seis. Support	1,1	2,1	64	LOA	5,279	2015-06	Besiktas Shipyard	Established 2000-10	13.11.2012	Thor Ltd
43	N/A	MPP	12,107	9	12,107	DWT	9,164	2015-	Gelibolu Shipyd	Established <2000	01.01.2011	Albros Shipping
44	N/A	Bunkering	2,2		2,2	DWT	2,9	2015-	Akdeniz Gemi	Established >2010	05.07.2012	Pallas Shipping AB
45	1	MPP	9,5	4,896	9,5	DWT	6,207	2015-01	Akdeniz Gemi	Established >2010	01.02.2011	Akdeniz Gemi
46	221	Chem & Oil	6	3,954	6	DWT	7,992	2015-01	Anadolu Shipyard	Established <2000	01.07.2008	Anadolu Kim. Tanker.
47	68	Chem & Oil	13,5		13,5	DWT	11,921	2015-	Yardimci Deniz	Established <2000	01.04.2008	Yardimci Shpg. Group
48	2052	Chem & Oil	11,259	7,321	11,259	DWT	11,215	2015-	Dearsan Shipyd.	Established <2000	01.07.2007	Yardimci Shpg. Group
49	90	Chem & Oil	4,9		4,9	DWT	6,827	2015-	Ustaoglu Shipyard	Established <2000	01.01.2006	Tanmarin Denizcilik

Total Number of Vessels: 49
Total Dwt(m) of Vessels: 268,442

Source: Clarkson Research Ser. 03/2015

CHAPTER IV

PORT DEVELOPMENTS

Ports Information in General

The coastline of Anatolia is 8333 Km long. Total numbers of ports are 172 along the coastline. 6 ports are operated by Turkish Maritime Administrations and 2 out of 7 railway connected ports are operated by Turkish State Railways.

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

GOVERNMENT	**21 PORTS**
MUNICIPALITY	**23 PORTS**
PRIVATE	**128 PORTS**

The major part of international trade is being realized through maritime transportation in Turkey. 86 % of goods (import-export) have been maritime transported in 2014.

Theoretical capacity of Turkish ports are as below;

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

The goal of Turkey is to become a centre for transit cargoes in the region. The strategical position of Turkey is increasing after the pipe lines like Baku-Tiflis-Ceyhan, and projects like 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.

383.091.368 tons of cargo is realized at Turkish ports in 2014.

- 23,1 % of handling is export with 88.536.814 tons.
- 50,8 % of handling is import with 194.713.786 tons.
- 13,3 % of handling is cabotage with 50.729.208 tons.
- 12,8 % of handling is transit with 49.111.560 tons.

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

TABLE (49): Cargo Handling Figures At Turkish Ports (Acc. to Transport Mode)

MODE OF TRANSPORT		2010	2011	2012	2013	2014
EXPORT	TURKISH	11.615.686	12.273.915	12.235.897	11.660.647	12.739.297
	FOREIGN	72.329.476	69.502.777	79.071.589	77.893.343	75.797.517
	TOTAL	**83.945.162**	**81.776.692**	**91.307.486**	**89.553.990**	**88.536.814**
IMPORT	TURKISH	28.878.432	30.120.033	26.476.350	22.949.887	20.876.309
	FOREIGN	133.747.337	143.426.365	165.998.578	164.831.728	173.837.477
	TOTAL	**162.625.769**	**173.546.398**	**192.474.928**	**187.781.615**	**194.713.786**
CABOTAGE	LOADING	18.561.807	21.257.193	22.869.458	26.076.342	24.982.892
	UNLOADING	19.434.485	22.387.290	24.049.929	27.861.596	25.746.316
	TOTAL	**37.996.292**	**43.644.483**	**46.919.387**	**53.937.938**	**50.729.208**
TRANSIT	LOADING	58.767.061	58.603.055	50.767.011	46.930.435	44.278.082
	UNLOADING	5.355.657	5.776.095	5.957.420	6.726.780	4.833.478
	TOTAL	**64.122.718**	**64.379.150**	**56.724.431**	**53.657.215**	**49.111.560**
GR.TOTAL	LOADING	161.274.030	161.636.940	164.943.955	162.560.767	157.797.788
	UNLOADING	187.415.911	201.709.783	222.482.277	222.369.991	225.293.580
	TOTAL	**348.689.941**	**363.346.723**	**387.426.232**	**384.930.758**	**383.091.368**

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

GRAPH 47: Cargo Handling Figures According To Years

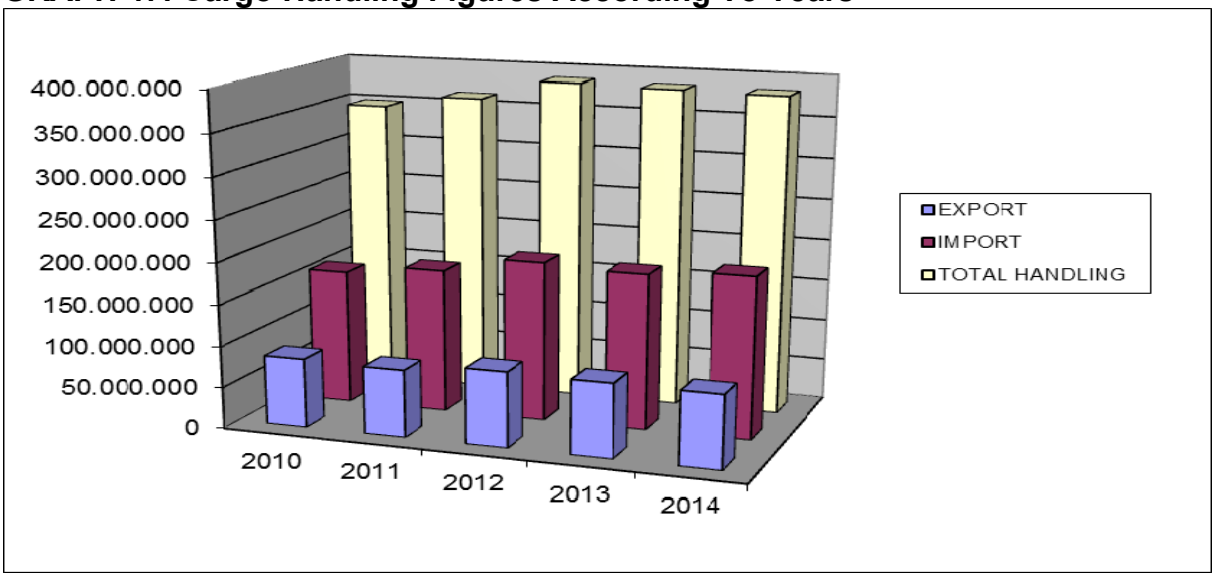
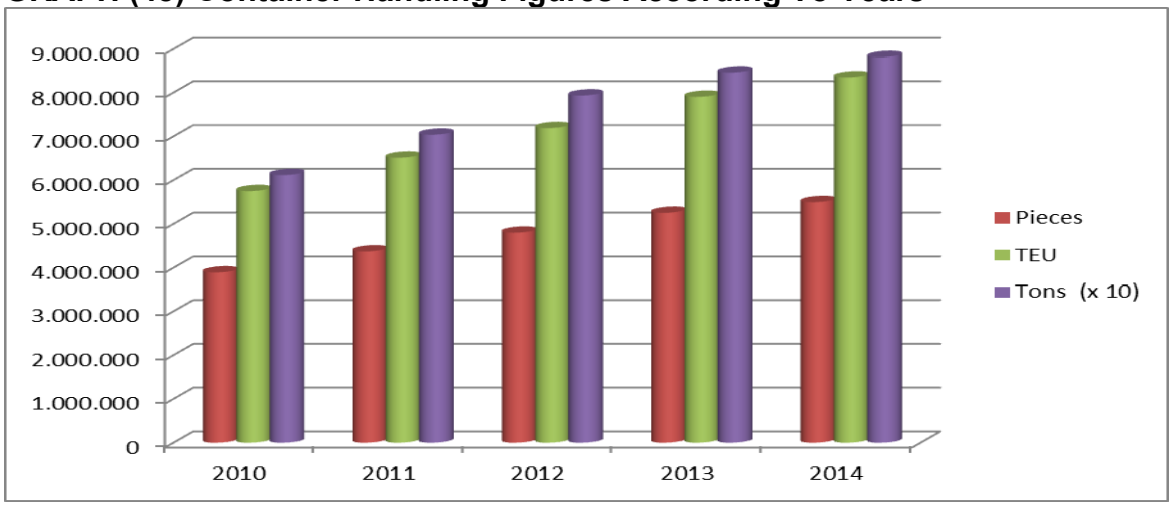


TABLE (50): Container Handling Figures At Turkish Ports

MODE OF TRANSPORT		2010	2011	2012	2013	2014
EXPORT	PCS	1.557.767	1.798.545	1.910.075	2.088.031	2.269.118
	TEU	2.306.587	2.690.889	2.879.122	3.165.653	3.487.949
	TONS	26.433.473	30.010.607	33.199.345	35.456.728	39.106.361
IMPORT	PCS	1.591.010	1.851.026	1.953.229	2.121.533	2.335.795
	TEU	2.354.304	2.770.190	2.942.562	3.199.969	3.581.809
	TONS	23.151.182	28.409.300	29.871.028	30.715.331	34.790.524
CABOTAGE	PCS	152.096	215.942	342.604	397.602	390.510
	TEU	208.325	305.256	472.345	544.496	526.798
	TONS	1.730.667	2.890.088	4.758.088	5.732.348	4.934.786
TRANSIT	PCS	590.531	514.014	589.019	651027	513.195
	TEU	874.239	757.171	898.368	989.815	754.216
	TONS	9.859.808	9.071.262	11.482.912	12.751.785	9.305.368
GRAND TOTAL	PCS	**3.891.404**	**4.379.527**	**4.794.927**	**5.258.193**	**5.508.618**
	TEU	**5.743.455**	**6.523.506**	**7.192.396**	**7.899.933**	**8.350.772**
	TONS	**61.175.130**	**70.381.257**	**79.311.373**	**84.656.192**	**88.137.039**

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	Type of Cargo	Exist. Capacity	End of Project
Borusan Lojistik	Container	400,000 TEU	650,000 TEU (2015)
	General Cargo	5,000,000 Tons	6,500,000 Tons (2015)
Ege Gübre	Container	400,000 TEU	600,000 TEU
Evyap	Container	600,000 TEU	1,200,000 TEU (2015)
Limak İskenderun	Container	400.000 TEU	3,000,000 TEU (2016)
Toros Tarım (Samsun)	Solid Bulk/ General Cargo	3,300,000 Tons	8,500,000 Tons

Yılport	Container	450,000 TEU	2,500,000 TEU (2015)
	General Cargo	2,500,000 Tons	4,000,000 Tons
	Liquid	500,000 m³	1,000,000 m³ (2015)
Aksa	General Cargo	-	4,000,000 Tons
DP World	Container	-	1,300,000 TEU
Batıçim	Container	-	300,000 TEU (2015)
	General Cargo	6,000,000 Tons	7,500,000 Tons (2015)
İgsaş	General Cargo	2,000,000 Tons	2,500,000 Tons (2015)
Altıntel	General Cargo	1,000,000 Tons	5,000,000 Tons (2015)
	Liquid	1,500,000 m³	6,000,000 m³ (2015)
Koruma Klor	General Cargo	-	300,000 Tons
	Liquid	2,200,000 Tons	3,200,000 Tons
Martaş	General Cargo	3,000,000 Tons	5,000,000 Tons (2015)
Petkim	Container	-	1,100,000 TEU (2016)

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

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

State Investments

Presently 4 large scale projects are planned as state investements. 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. Planned to be built in three phases which aims to provide 4 million TEU in its first phase followed by further expansion to take total capacity to 12 million TEU.

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 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 cargo.

Derince Container Terminal which will be built on the fill area east of existing Derince Port, will provide 1.000.000 TEU capacity increase.

Capacity of İzmir Port is planned to reach 2.500.000 TEU at 2015 by additional investments.

Asyaport

Asyaport is a new Greenfield container terminal located in Barbaros / Tekirdağ, built by Asya Port Liman A.S, located in Barbaros / Tekirdağ (40 54' N; 27 28' E) on 30 Ha of reclamed land as a container terminal. The construction has started in 2010 and completed for operations in July 2015.

Having two kilometers of wharf length and 20 meters of depth, the port is also serve as Turkey's first transit container port with a handling capacity of 2,5 million TEU which makes it a world scale port.

Electric energy is used to power the ports' 11 ship-to-shore gantry cranes and 33 rubber tyre gantry cranes to sustain an environmental approach.

Turkey in "Doing Business 2014" 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 2014 list as 2013, followed by Hong Kong, New Zealand, USA, Denmark, Malaysia, Korea, Georgia, Norway and UK.

Turkey's 2014 economic profile was evaluated in report where Turkey upgraded by 3 steps acc to 2011 and located at 69st place in doing business facility sequence. Some neighboring countries of Turkey got following ranks: Georgia 8, Bulgaria 58, Greece 72, Romania 73, Russia 92, Iraq 151, İran 152 and Syria 165. East Europe and Central Asia Countries averaged to 73. Turkey although has a better value comparing to current geography, located at the back in overall list.

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

Criteria	Turkey's Location	Best Country
Starting Business	93	New Zealand
Obtaining Building Licence	148	Hong Kong
Getting Electricity Service Connected	49	İceland
Ownership Record	50	Georgia
Loan Facility	86	Malaysia
Investor Protection	34	New Zealand
Taxes	71	UAE
Cross Border Trade Potential	86	Singapore
Practibility of Business Agreements	38	Luxemburg
Problem Solving of Bankruptcy	130	Japan

According to the table, biggest problem confronted by new beginner entities in Turkey is to obtain building licence for which Turkey is at 148th place. Likewise got 130th place for problem solving ability in the case of bankruptcy. On the other hand, Turkey is among 50 countries for criterias such as ownership record, electricity connection, practibility of business agreements and protection of investors.

Turkey in Logistic Performance Index 2014 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.

Logistic 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 infrastractures 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 is located at 30th place in the last published 2014 report while countries in the first 10 row of the list are Germany, Netherlands, Belgium, UK, Singapore, Sweden, Norway, Luxembourg, USA and Japan. Having looked at neighbouring countries sortings of 2014 amongst 160 countries; Romania 40, Greece 44, Bulgaria 47, Russia 90, Georgia 116, Iraq 141 and Syria took at 155th place.

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	Best Country
Custom	34	Norway
Infrastructure	27	Germany
Arrangement of shipment	48	Luxembourg
Quality and competence	22	Norway
Follow up and monitoring	19	Germany
Timing	41	Luxembourg

Comparing with 2012 report, Turkey degraded by 3 steps. According to previous report, service quality and monitoring developed in Turkey while there has been decrease in remaining categories and general sequence.

Low and middle income countries are advised to improve custom arrangements and infrastructues to increase their lojistic performances in the report.

TDI Ports and Privatizations

TABLE (51): 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

Table 52: Specifications and Capacities of TCDD Ports

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

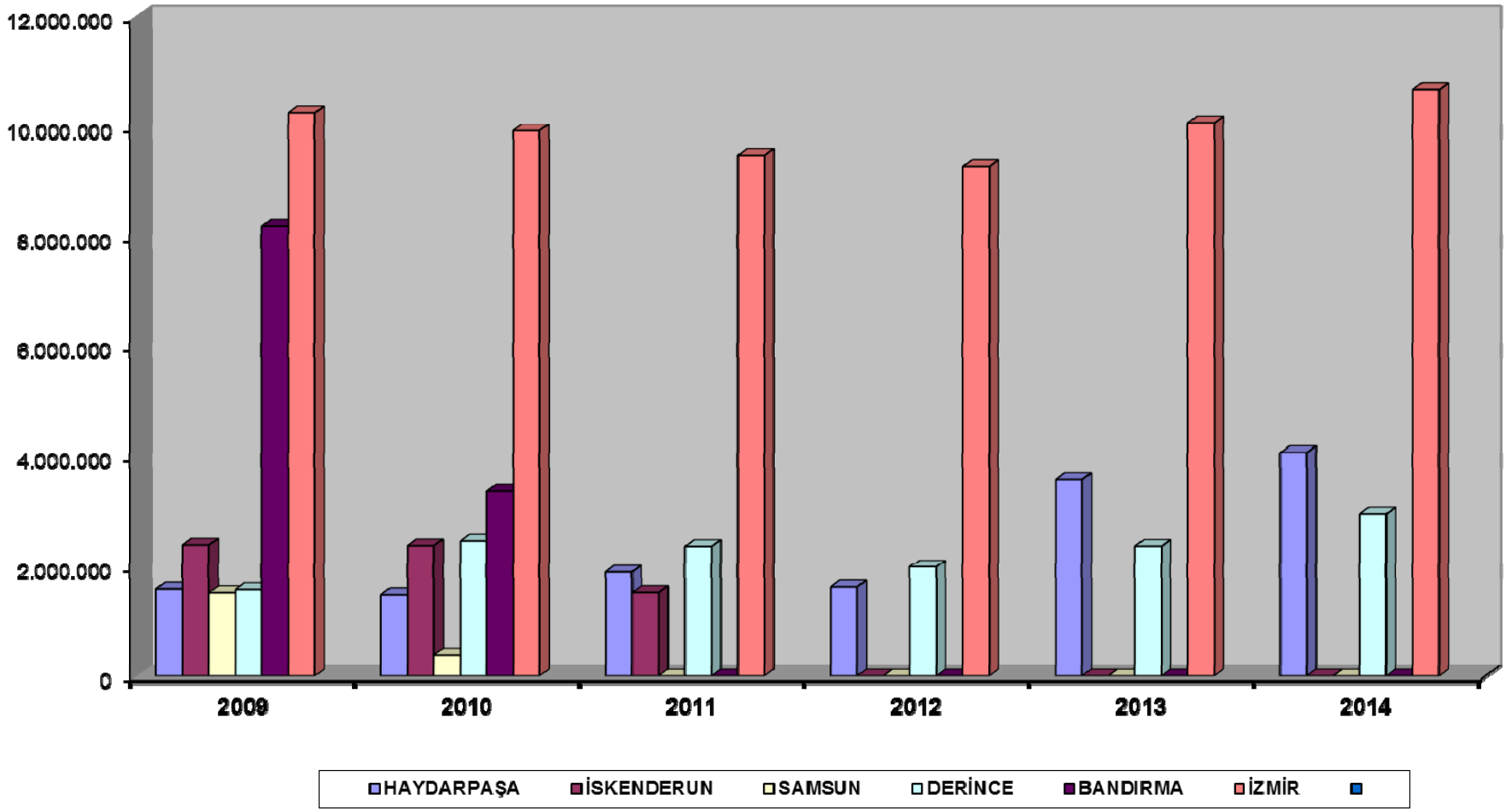
Source: TCDD

Table (53): TCDD Ports 2009-2014 Handling Figures Acc To Cargo Groups

PORT	YEAR	GENERAL CARGO	CONTAINER	DRY BULK	LIQUID BULK	TOTAL
HAYDARPAŞA	2009	40.136	1.557.784	0	0	1.597.920
	2010	31.684	1.435.678	24499	0	1.491.861
	2011	297.365	1.600.626	0	0	1.897.991
	2012	417.729	1.219.778	0	0	1.637.507
	2013	1.909.774	951.634	733450	0	3.594.858
	2014	2.759.000	762.088	568900	0	4.089.988
İSKENDERUN	2009	730.671	0	827.299	855.373	2.413.343
	2010	793.774	689	823.830	782.213	2.400.506
	2011	485.202	0	325.688	721.856	1.532.746
	2012	0	0	0	0	0
	2013	0	0	0	0	0
	2014	0	0	0	0	0
SAMSUN	2009	705.281	3440	787.266	33.019	1.529.006
	2010	187.930	794	209.691	6.230	404.645
	2011	0	0	0	0	0
	2012	0	0	0	0	0
	2013	0	0	0	0	0
	2014	0	0	0	0	0
DERİNCE	2009	964.081	2.370	570.856	49.410	1.586.717
	2010	1.071.481	6.214	1.356.534	51.031	2.485.260
	2011	1.264.824	10.143	1.005.367	106.203	2.386.537
	2012	1.127.186	9.817	756.782	102.107	1.995.892
	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
BANDIRMA	2009	5.787.476	175	2.232.264	206.894	8.226.809
	2010	2.177.071	0	1.113.763	90.500	3.381.334
	2011	0	0	0	0	0
	2012	0	0	0	0	0
	2013	0	0	0	0	0
	2014	0	0	0	0	0
İZMİR	2009	379.198	7.751.632	1.942.878	204.402	10.278.110
	2010	485.805	6.995.792	2.296.522	148.439	9.926.558
	2011	523.849	6.754.509	2.020.321	205.418	9.504.097
	2012	558.627	6.674.362	1.764.131	304.436	9.301.556
	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
TOTAL	2009	8.606.843	9.315.401	6.360.563	1.349.098	25.631.905
	2010	4.747.745	8.439.167	5.824.839	1.078.413	20.090.164
	2011	2.571.240	8.365.278	3.351.376	1.033.477	15.321.371
	2012	2.103.542	7.903.957	2.520.913	406.543	12.934.955
	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

** Bandırma Port was handed over to Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş. on 18.05.2010.*
** Samsun Port 2010 Tonnage is till end of March*
** İskenderun Port was handed over to Limak A.Ş. on 30.12.2011*

GRAPH (50): TCDD Ports 2009 – 2014 Handling Figures



GRAPH (51): 2014 TCDD Ports Handling Acc. To Cargo Groups

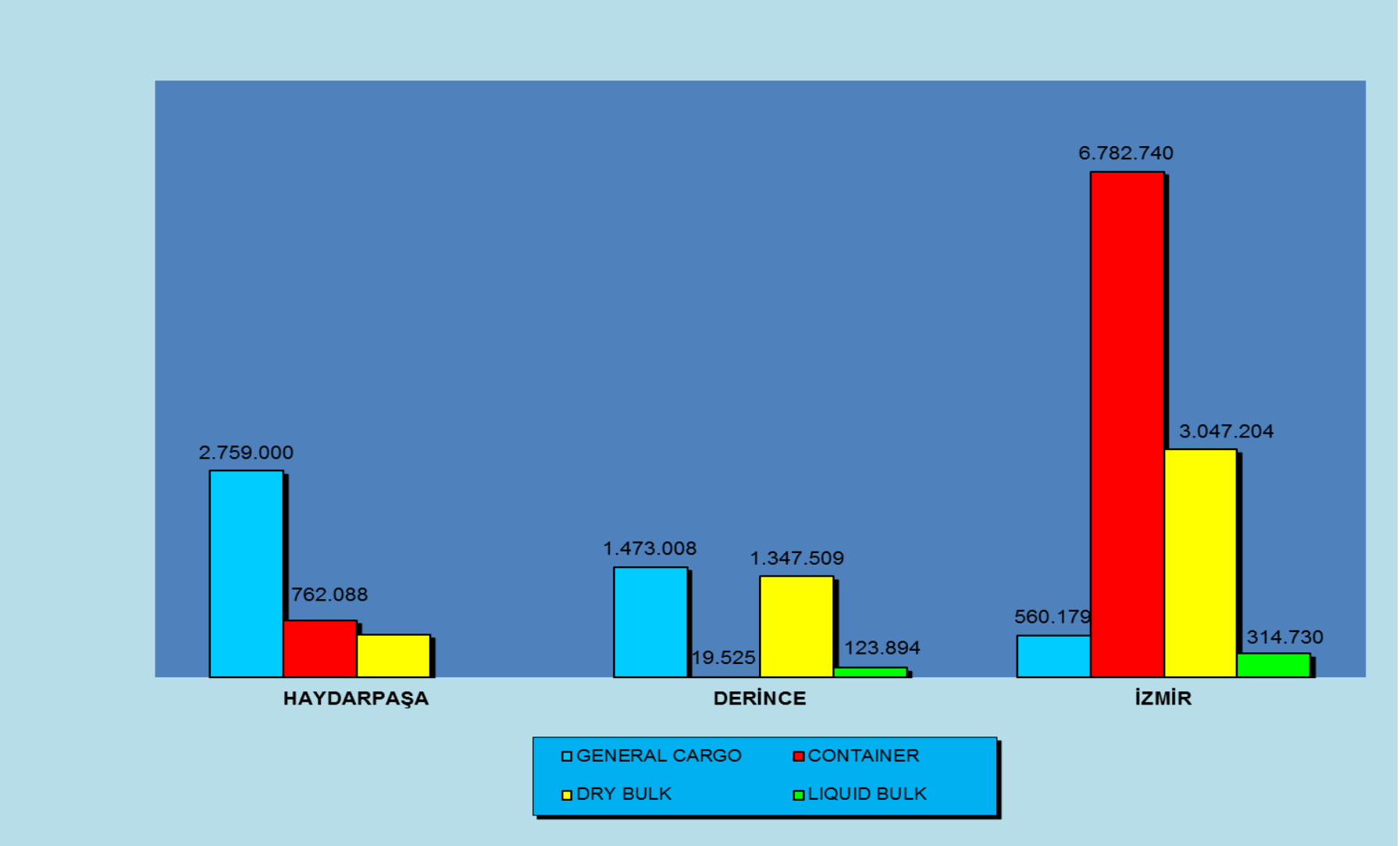
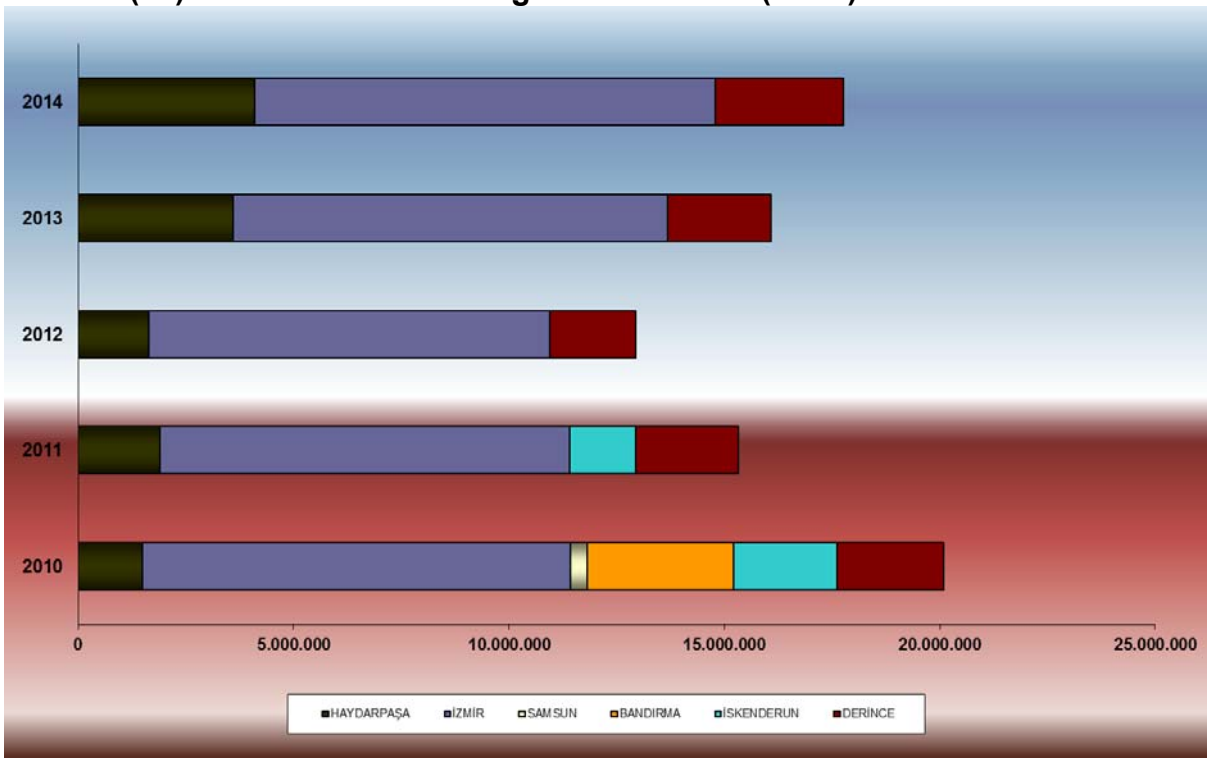


Table (54): TCDD Ports Loading And Unloading Figures

YEARS	LOADING			UNLODAING			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
HAYDARPAŞA							
2010	403.616	20.515	0	1.067.730	0	0	1.491.861
2011	612.846	0	0	1.285.145	0	0	1.897.991
2012	602.875	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**
İZMİR							
2010	6.340.777	0	0	3.308.371	277.410	0	9.926.558
2011	5.488.035	0	0	3.725.904	290.158	0	9.504.097
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**
SAMSUN							
2010	150.598	988	0	248.093	4.667	299	404.645
2011	0	0	0	0	0	0	0
2012	0	0	0	0	0	0	0
2013	0	0	0	0	0	0	0
2014	**0**	**0**	**0**	**0**	**0**	**0**	**0**
BANDIRMA							
2010	298.149	1.125.521	0	923.863	1.033.801	0	3.381.334
2011	0	0	0	0	0	0	0
2012	0	0	0	0	0	0	0
2013	0	0	0	0	0	0	0
2014	**0**	**0**	**0**	**0**	**0**	**0**	**0**
İSKENDERUN							
2010	836.452	85.301	269	668.723	790.185	19.576	2.400.506
2011	465.918	21.025	1.676	304.453	729.548	10.126	1.532.746
2012	0	0	0	0	0	0	0
2013	0	0	0	0	0	0	0
2014	**0**	**0**	**0**	**0**	**0**	**0**	**0**
DERİNCE							
2010	1.580.194	0	0	884.841	20.094	131	2.485.260
2011	1.327.729	6.164	96	1.040.057	12.491	0	2.386.537
2012	1.275.142	15.287	0	668.618	36.845	0	1.995.892
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**
TOTAL							
2010	9.609.786	1.232.325	269	7.101.621	2.126.157	20.006	20.090.164
2011	7.894.528	27.189	1.772	6.355.559	1.032.197	10.126	15.321.371
2012	7.116.784	65.593	0	5.542.780	209.798	0	12.934.955
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**

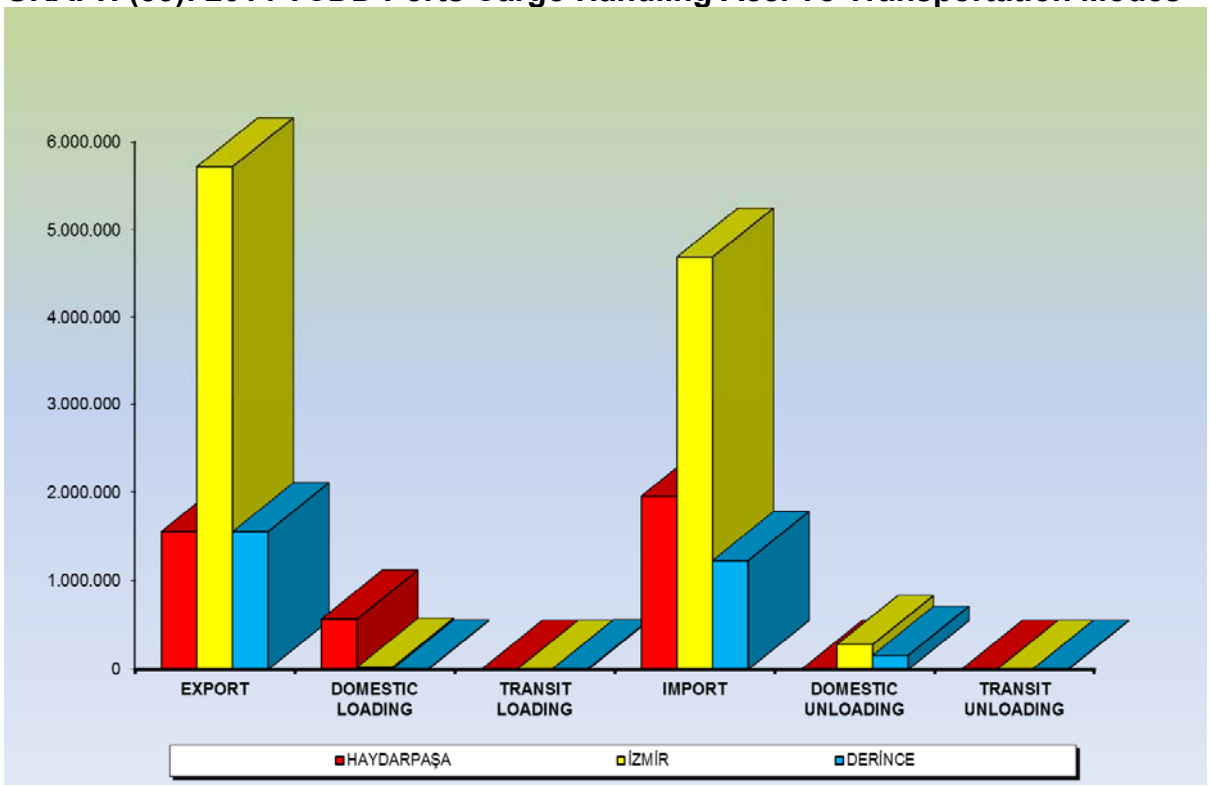
** Samsun Port 2010 Tonnage is till end of March*
** Bandırma Port was handed over to Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş. on 18.05.2010.*
** İskenderun Port was handed over to Limak A.Ş. on 30.12.2011*

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



Source: TCDD

GRAPH (53): 2014 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

Privatized TCDD Ports

Mersin International Port (MIP)

Strategic Location

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

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

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

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

Access by railroad

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

Access by highway

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

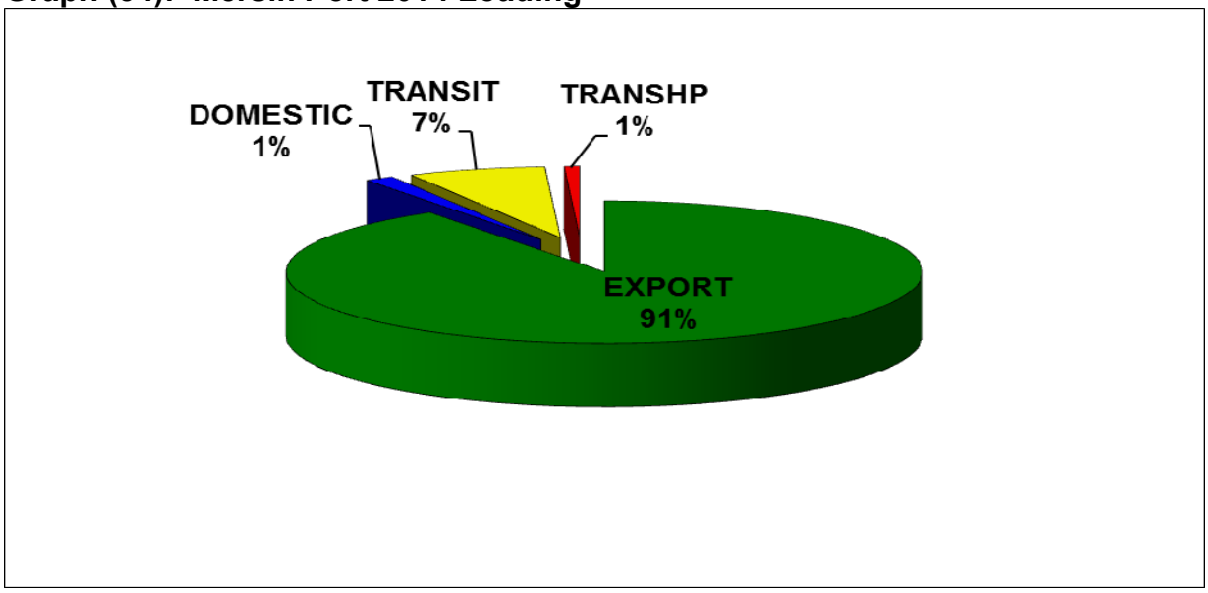
Free Port Zone

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

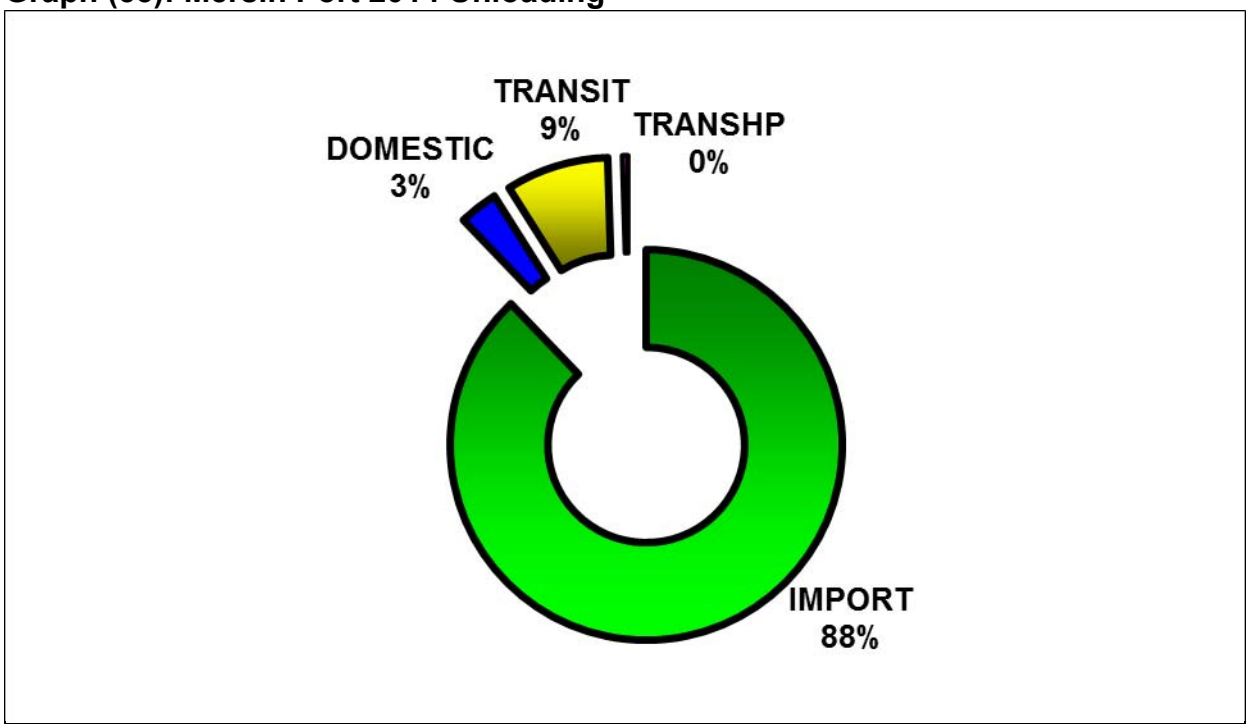
Table (55): Handling Figures of Mersin International Port (2014)

MERSIN INTERNATIONAL PORT									
TYPE OF CARGO	LOADING (Tons)				UNLOADING (Tons)				TOTAL
	EXPORT	DOMESTIC	TRANSIT	TRANSHP	IMPORT	DOMESTIC	TRANSIT	TRANSHP	
CEMENT	998.365	64.337	88.186		44.843		429		1.196.160
CEREALS	188.747	31.116	5.123	2.372	1.708.491		5.900	2.641	1.944.390
CHEMICALS	913.459	8.879	24.155	17.825	2.290.496	20.070	33.337	16.609	3.324.830
CITRUS	141.309		8.284		26.910		132		176.635
CNTR	166		337.595				350.038		687.799
CONST. MACHINERY	11.753	400	73	115	23.921		13.950	174	50.386
COTTON	62.770		10.249	401	376.607		1.843	143	452.013
EMPTY MAFI	168		12		12				192
FERTILIZERS	58.111	19.984	61.192	535	507.513	72.068	9.664	757	729.824
FOOD STUFF	1.519.620		50.248	5.924	735.434		80.976	6.030	2.398.232
FROZEN MEAT	2.136		358		17.639		90.483	49	110.665
FRUITS	223.917		3.703	1.859	158.451		450.479	2.148	840.557
GENERAL CARGO	2.332.407	6.027	191.758	55.562	2.979.259	64.070	372.414	53.610	6.055.107
GLASS	189.540		787	928	47.159		2.112	655	241.181
LEGUMES	220.785		5.383		1.106.645		12.596	351	1.345.760
LIVESTOCK	423		9		1.500				1.932
MACHINERY	78.953		1.685	272	127.888		14.677	422	223.897
MINERALS	2.089.075	14.695	2.451	416	452.369	1.900	1.745	337	2.562.988
PETR. PRODUCTS	704.766	25.146	150	17	3.847.192	458.484	50.676	17	5.086.448
RICE	146.730	6.474	13.571	47	506.932		15.725		689.479
SODIUM CARB.	451.983		55		879				452.917
SUGAR	1.862		6.502		76.342		947		85.653
TEXTILE	443.379		15.083	2.753	768.916		51.544	2.818	1.284.493
TIMBER	8.472		4.226	566	109.398		6.543	1.565	130.770
VEGETABLE OIL	101.557		4.815	4.504	961.082		4.720	3.975	1.080.653
VEHICLES	23.397		4.763	33	80.170		67.263	90	175.716
TOTAL	10.913.850	177.058	840.416	94.129	16.956.048	616.592	1.638.193	92.391	31.328.677

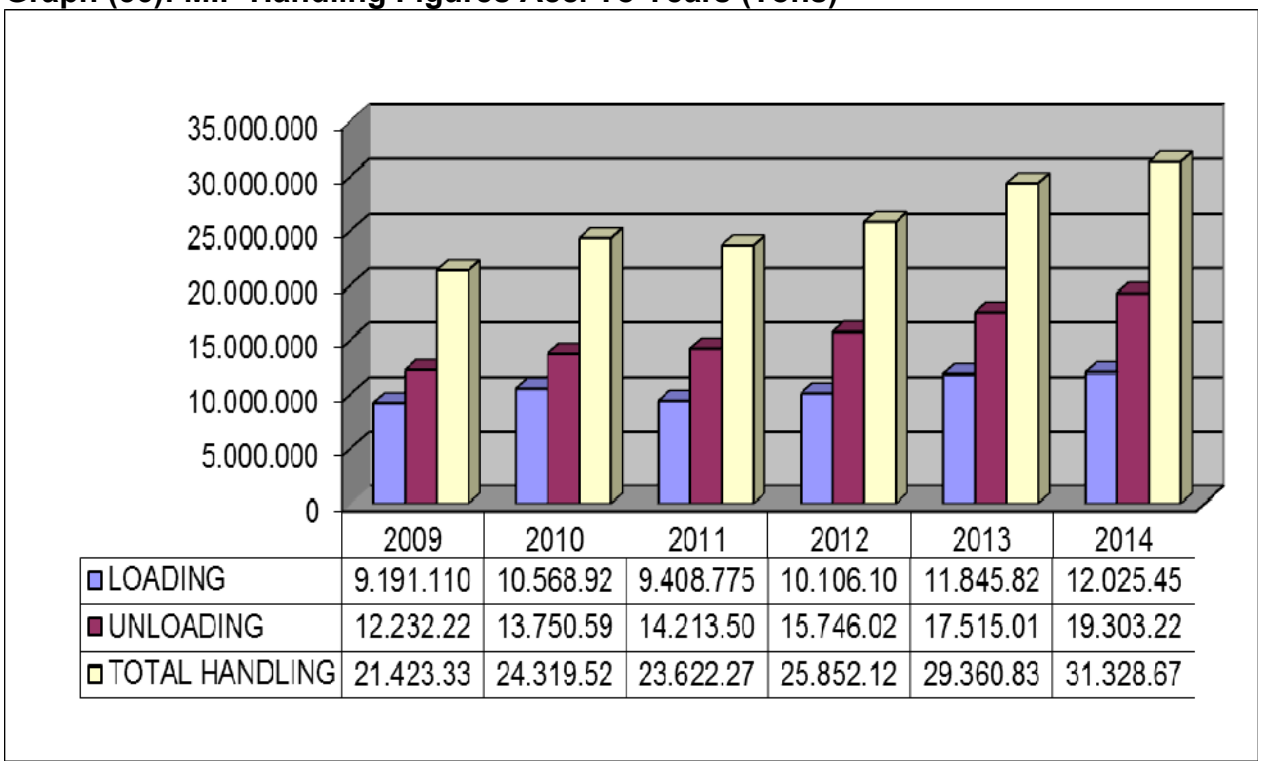
Graph (54): Mersin Port 2014 Loading



Graph (55): Mersin Port 2014 Unloading



Graph (56): MIP Handling Figures Acc. To Years (Tons)



	2009	2010	2011	2012	2013	2014
LOADING	9.191.110	10.568.92	9.408.775	10.106.10	11.845.82	12.025.45
UNLOADING	12.232.22	13.750.59	14.213.50	15.746.02	17.515.01	19.303.22
TOTAL HANDLING	21.423.33	24.319.52	23.622.27	25.852.12	29.360.83	31.328.67

Source: MIP

Samsunport (Samsun)

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

Samsunport is the biggest port of Turkey in Black Sea region and also it has a large hinterland. Because of this feature, the said port is a popular place for cargoes which come from and will go to Anatolia. Samsunport has railway and road connections with Kastamonu, Ankara, Kirsehir, Kayseri, Nigde, Konya, Malatya, Sinop, Corum, Amasya, Ordu, Sivas, Erzincan, Yozgat, Tokat. Samsunport aims to achieve top quality and speedy service by renewing vehicle park, making the revision of the present vehicles, construction of new warehouses, silos and liquid tanks.
Storage and port services are provided within 350.000 sqm port area of 445.000 sqm. In Samsunport, there are steel cereal silos, warehouses and general cargo storage areas.

Main Port

Dock numbers 1-2-3-4-5 have a total length of 776 meters and a draft of 7,5 to 10 meters.
Dock number 9 has a length of 400 meters and a draft of 6 meters.

Industry Dock

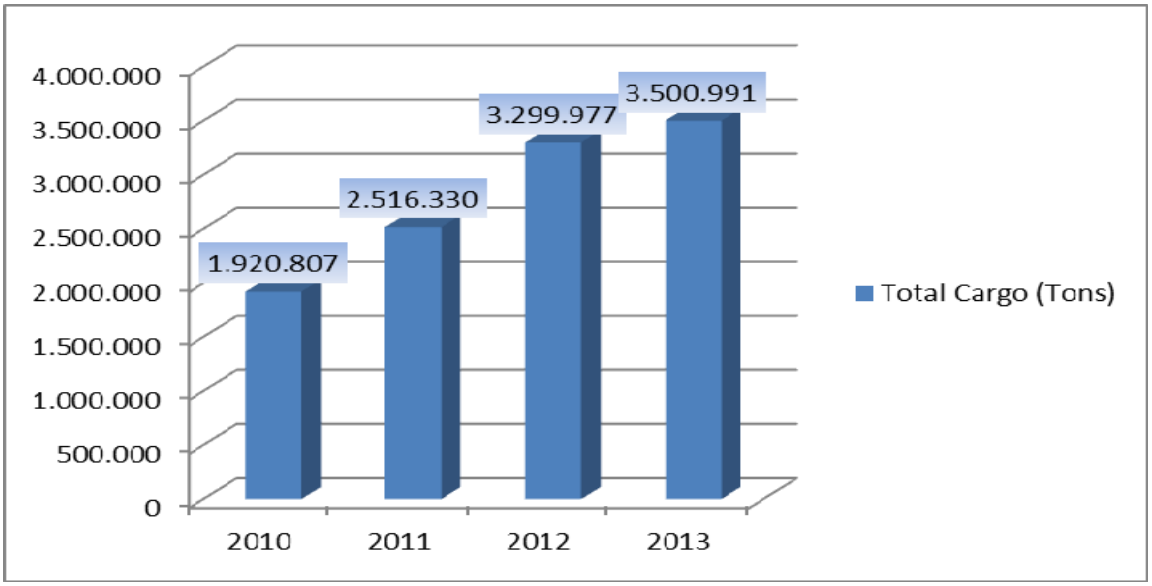
Dock numbers 6-7 have a total length of 400 meters and a draft of 11 meters.
Dock number 8 is Rail ferry Ramp, suitable for 1520 mm rail cars.
1391 vessels called Samsun Port in 2012. Handling Figures of Samsun Port according to cargo groups are as below;

Table (56): Handling Figures of Samsunport Acc. To Years

Year	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (Tons)	Ro-Ro (Tons)	Wagon Ferry (Tons)	**Total (Tons)**
2013	1.657.680	61.558	761.662	486.623	491.547	41.921	3.500.991
2012	1.543.651	55.742	716.700	393.184	528.682	62.018	3.299.977
2011	1.064.298	14.848	805.635	82.212	527.013	22.324	2.516.330
2010	844.993	32.008	637.415	4.015	402.376		1.920.807

Source: Samsunport

Graph (57): Samsun Port Handling Figures Acc. To Years (Tons)



Çelebi Bandırma Port

The port has connections to Istanbul, Turkey's business and industrial center, to the Southern Marmara and Aegean Region and has a strategic location at the south coast of Marmara. It offers bulk load, ro-ro and mixed load handling services. 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 12 meters, the facility handles bulk cargo, general cargo, project-related cargo and services Ro-Ro ships. Loading and unloading services at the quay 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 two.

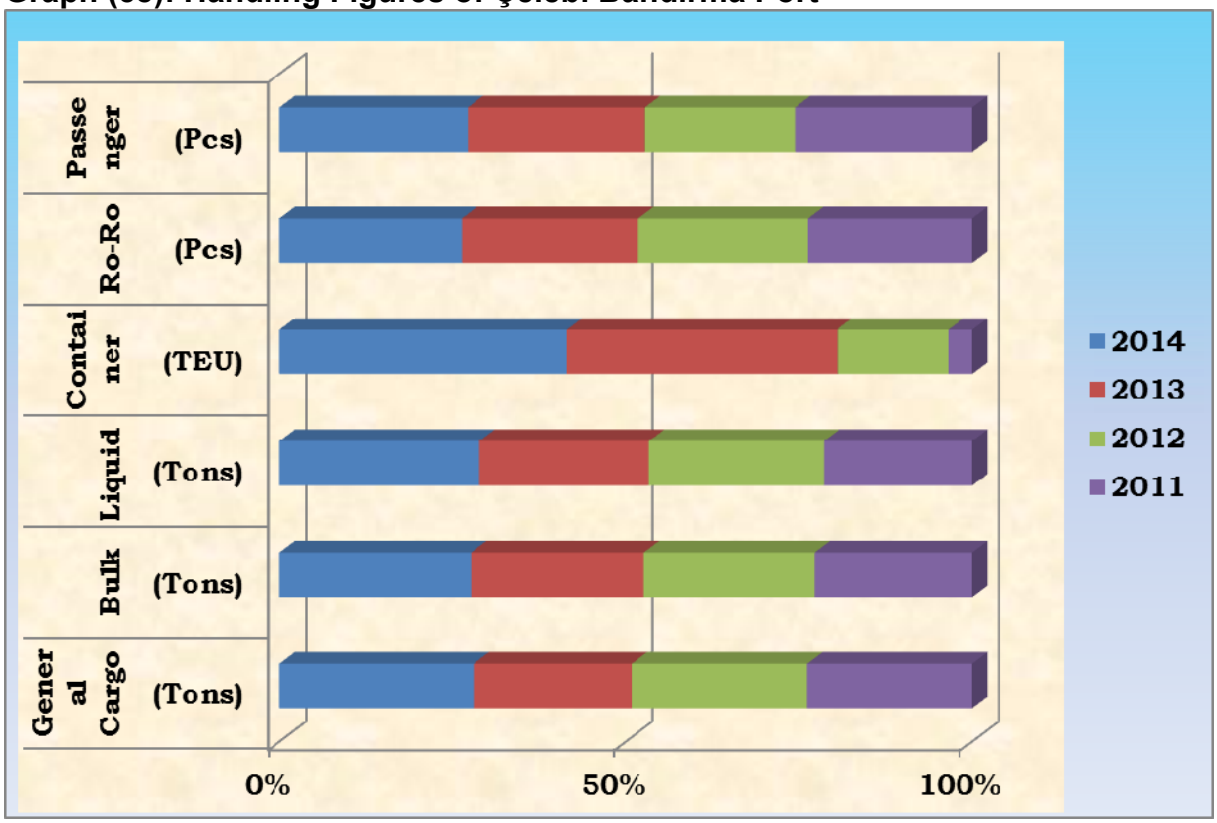
The Port of Bandırma keep on investing on high-tech equipments to make port operations productive *(three mobile cranes with a capacity of 100 tons, excavators with 3000 – 15000 tons/day capacity, stackers etc.)* 100 million USD investment plan have been made within master plan, upon finalization of last phase, capacities of container terminal to 350.000 TEU, vertical silo warehouse to 60.000 tons, tank terminal to 100.000 tons are planned to reach.

Table (57): Handling Figures of Çelebi Bandırma Port Acc. To Years & Cargo Groups

Year	General Cargo (Tons)	Bulk (Tons)	Liquid (Tons)	Container (TEU)	Ro-Ro (Pcs)	Passenger (Pcs)
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 (58): Handling Figures of Çelebi Bandırma Port



Limakport İskenderun

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

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

Handling Figures of Limakport İskenderun

Bulk Cargo / General Cargo / Container

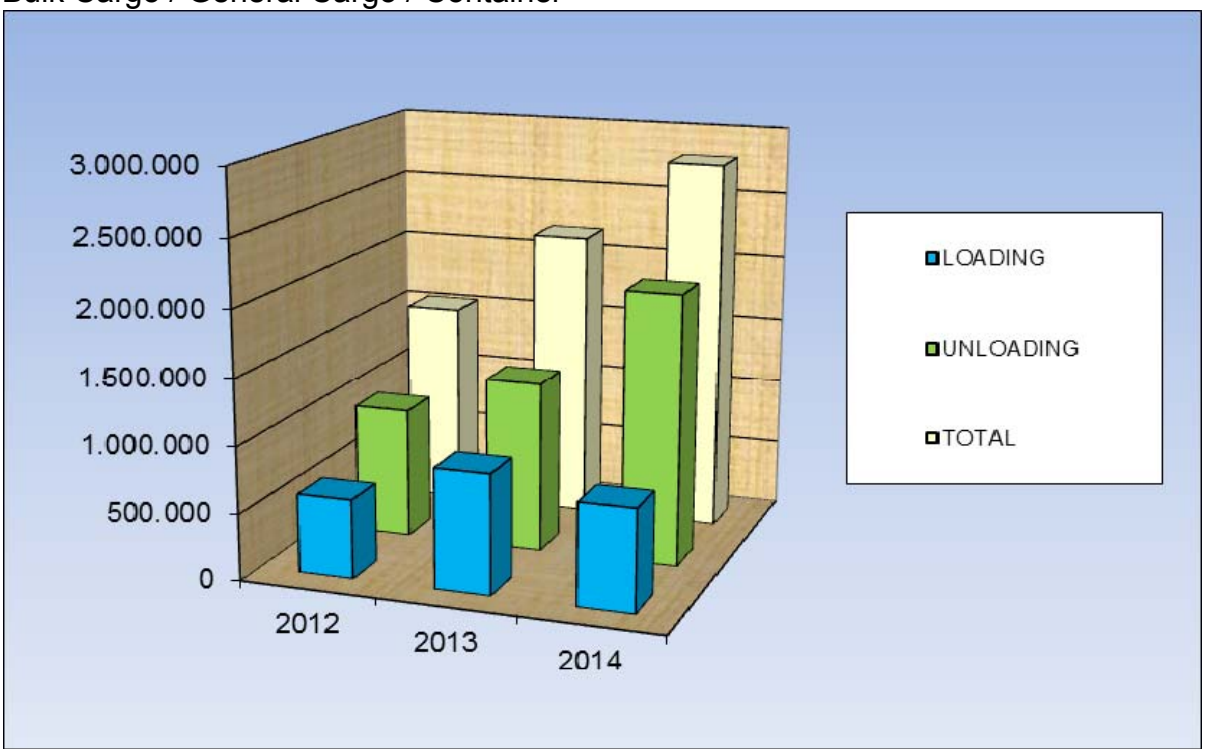
Year	Loading (Tons)	Unloading (Tons)	**Total (Tons)**
2012	594.158	984.486	**1.542.642**
2013	898.509	1.284.899	**2.183.408**
2014	764.444	2.035.390	**2.799.834**

Ro-Ro / Ro-Pax

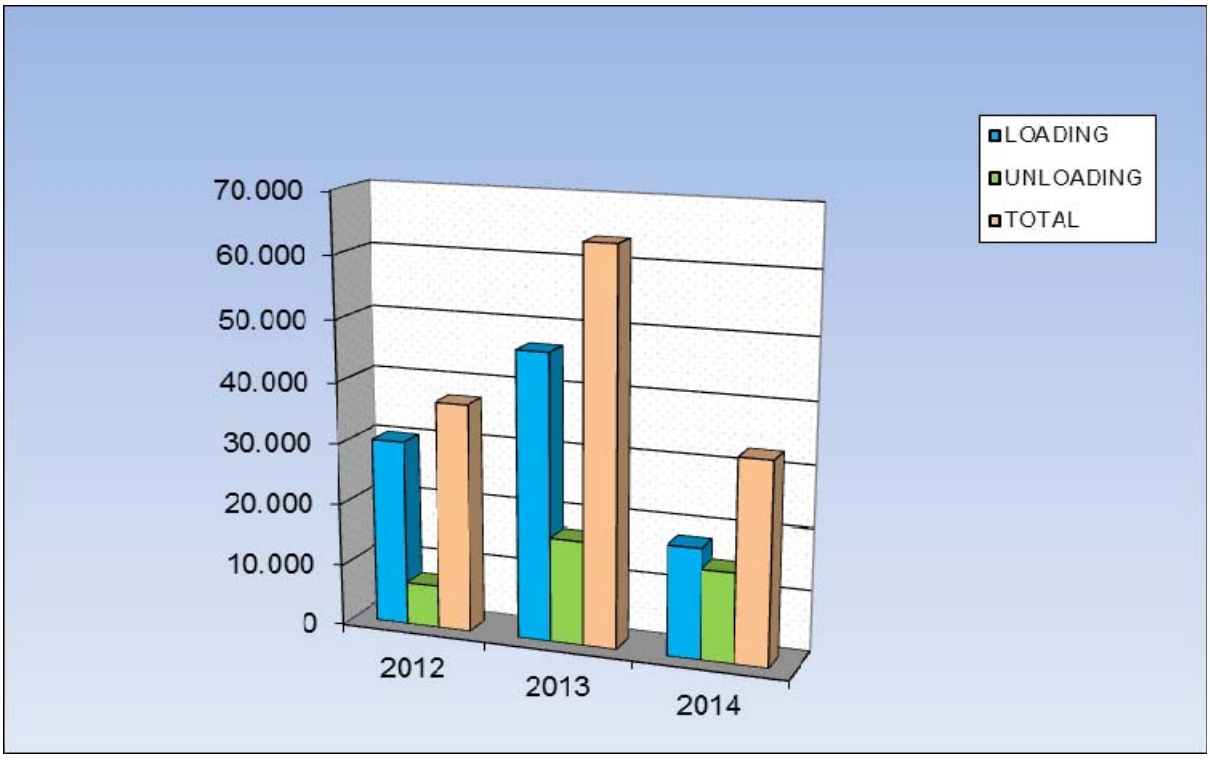
Year	Ro-Ro	Ro-Pax	**Total**
2012	30.208	6.982	**37.190**
2013	46.602	17.087	**63.689**
2014	18.066	14.736	**32.802**

Source: Limakport İskenderun

Bulk Cargo / General Cargo / Container



Ro-Ro / Ro-Pax



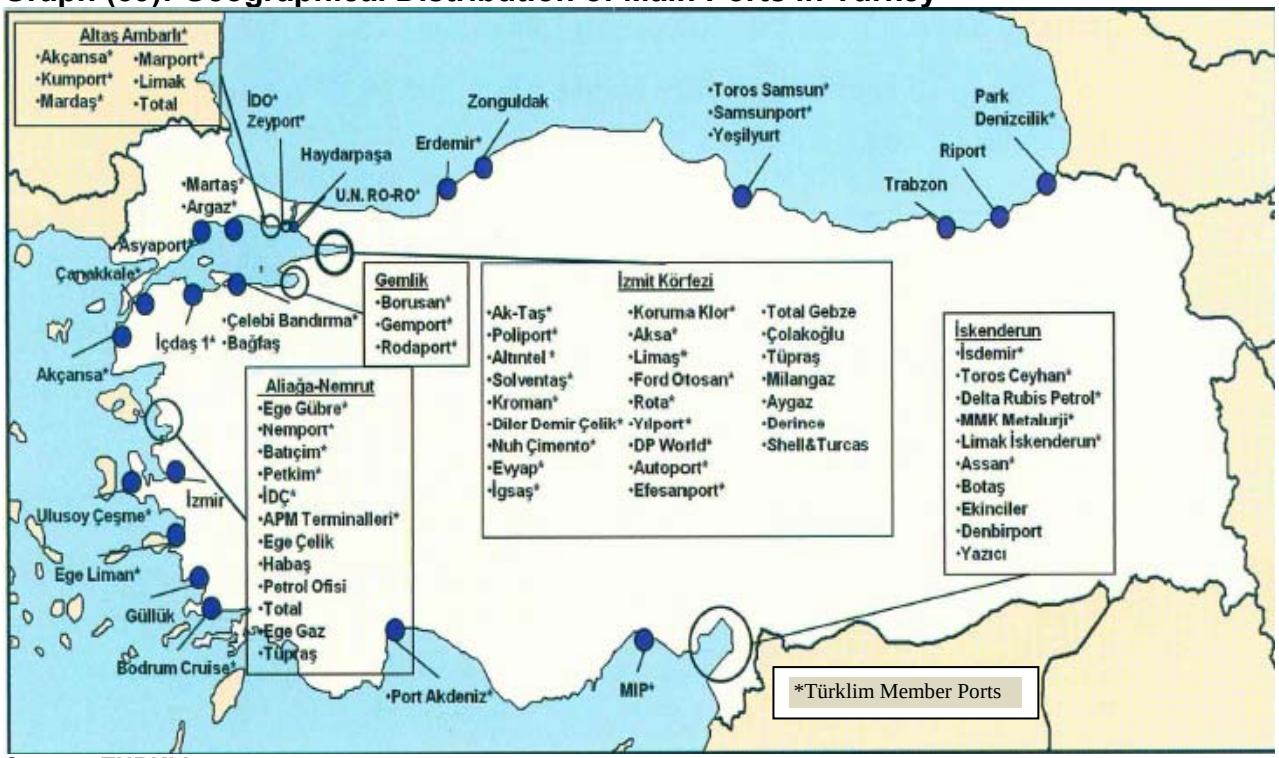
Private Ports' List and Geographical Distribution of Main Ports In Turkey

Table (58): 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) PORT OF BANDIRMA 10) BORUSAN LİMANI 11) BP GEMLİK İSKELESİ 12) GEMLİK GÜBRE LİMANI 13) GEMPORT 14) RODA LİMAN DEPOLAMA VE LOJİSTİK İŞLETMELERİ A.Ş. 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) SET ÇİMENTO SANAYİ VE TİCARET A.Ş. 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) ÇOLAKOĞLU METALURJİ TESİSLERİ 42) DİLER LİMAN TESİSLERİ 43) EVYAP DENİZ İŞLETMECİLİĞİ LOJİSTİK VE İNŞAAT A.Ş. 44) FORD OTOSAN YENİKÖY İSKELESİ 45) GÜBRETAŞ TESİSLERİ 46) HABAŞ TERMİNALİ 47) İGSAŞ İSTANBUL GÜBRE SANAYİ A.Ş. 48) EFESAN PORT

49) KIZILKAYA LİMANI
50) KORUMA KLOR ALKALİ SAN. VE TİC. A.Ş.
51) KROMAN ÇELİK LİMAN TESİSLERİ
52) LAFARGE ASLAN ÇİMENTO İSKELESİ
53) LİMAŞ İZMİT TERMİNALİ
54) MARMARA TRANSPORT İSKELESİ
55) MİLANGAZ ŞAMANDIRA TESİSLERİ
56) NUH ÇİMENTO SAN. A.Ş. (NUHPORT)
57) OPAY PLATFORM İSKELESİ
58) PETLINE PLATFORMU
59) PETROL OFİSİ DERİNCE İSKELESİ
60) POLİPORT
61) SEDEF KONTEYNER TERMİNALİ VE LİMAN İŞLETMELERİ
62) SHELL DERİNCE TESİSLERİ
63) SOLVENTAŞ
64) TOTAL GEBZE TERMİNALİ
65) TURKUAZ İSKELESİ
66) TÜPRAŞ İZMİT RAFİNERİ TESİSLERİ
67) TÜPRAŞ KÖRFEZ SIVI YÜK İSKELESİ
68) YALOVA ELYAF İSKELESİ
69) YARIMCA ROTA LİMANI
70) SAFİ DERİNCE LİMANI
71) DP WORLD YARIMCA LİMANI
72) ERDEM EREĞLİ ÇİMENTO ÖZEL LİMANI
73) ERDEMİR LİMANI
74) EREN HOLDİNG LİMANI
75) BÜTANGAZ TERMİNALİ
76) OPET MARMARA TERMİNALİ İSKELE VE PLATFORMU
77) SALIPAZARI KRUVAZİYER LİMANI
78) MARTAŞ MARMARA EREĞLİSİ LİMAN TESİSLERİ
79) ÇAYIROVA CAM SANAYİ İSKELESİ
80) GİSAŞ TUZLA İSKELESİ
81) U.N. RO-RO PENDİK LİMANI
82) YILPORT
83) AKDENİZ KİMYA NEMPORT LİMANI
84) EGE ÇELİK LİMANI
85) EGE GÜBRE LİMANI
86) EGE GAZ LNG TERMİNALİ
87) HABAŞ İSKELESİ
88) BATIÇİM A.Ş. BATI LİMAN TESİSLERİ
89) İDÇ LİMANI
90) PETROL OFİSİ ALİAĞA TESİSLERİ
91) TOTAL OIL İSKELESİ
92) TÜPRAŞ LİMANI
93) PETKİM LİMANI
94) BODRUM CRUISE PORT
95) GÜLLÜK GEMİ YANAŞMA İSKELESİ
96) ÇEŞME LİMANI
97) DİKİLİ İSKELESİ
98) MOPAK İSKELESİ
99) KUŞADASI YOLCU LİMANI
100) MARMARİS LİMANI
101) LİMAKPORT İSKENDERUN

102) TOROS CEYHAN TERMİNALİ 103) ADVANSA SASA POLYESTER TESİSLERİ 104) ÇEKİSAN ŞAMANDIRASI 105) GÜBRETAŞ SARISEKİ İSKELESİ 106) İSDEMİR LİMANI 107) DELTA PETROL LİMANI 108) ORHAN EKİNCİ İSKELESİ 109) YAZICI İSKELESİ 110) ATAŞ TERMİNALİ 111) MERSİN LİMANI 112) MMK ATAKAŞ DÖRTYOL LİMAN İŞLETMESİ 113) MESBAŞ RIHTIMI
114) SAMSUNPORT 115) TOROS TARIM SANAYİİ SAMSUN LİMAN İŞLETMESİ 116) SÜRSAN ŞAMANDIRASI 117) ORDU LİMANI 118) AYGAZ ŞAMANDIRALARI 119) PETROL OFİSİ ŞAMANDIRALARI 120) TOTAL OIL ŞAMANDIRASI 121) YILDIZ ENTEGRE AĞAÇ SAN. ŞAMANDIRASI 122) SİNOP LİMANI
123) GİRESUN LİMANI 124) PARK DENİZCİLİK HOPA LİMAN İŞLETMELERİ A.Ş. 125) RİPORT 126) ÜNYE ÇİMENTO TESİSİ LİMANI 127) POAŞ ŞAMANDIRA TESİSLERİ 128) TRABZON LİMANI

Graph (59): Geographical Distribution of Main Ports in Turkey



Source: TURKLI

5.1 STATISTICS FOR TURKISH STRAITS

TABLE (59) : RESUME OF STATISTICS OF SHIPS PASSING THROUGH ISTANBUL STRAIT (2014)

MONTHS	TOTAL SHIPS	TOTAL GT	WİTH PILOT	SP-1	TRANSIT	BIGGER THAN 200M	SMALLER THAN 500 GT	NUMBER OF TANKERS			TOWİNG
								TTA	LPG-LNG	TCH	
JANUARY	3.811	46.158.637	1.973	3.721	2.207	325	115	513	146	123	10
FEBRUARY	3.181	40.968.096	1.722	3.106	1.821	305	81	400	131	132	10
MARCH	3.968	49.658.165	2.063	3.909	2.359	368	87	516	167	135	7
APRİL	4.100	48.377.523	2.142	4.036	2.344	336	88	505	158	149	5
MAY	4.100	48.726.107	2.122	4.041	2.339	344	153	499	159	150	3
JUNE	3.689	45.049.691	1.976	3.657	1.987	329	72	464	120	147	3
JULY	3.814	50.183.180	2.084	3.768	2.141	383	82	464	125	124	5
AUGUST	3.930	54.013.777	2.200	3.893	2.312	433	64	492	107	125	9
SEPTEMBER	3.709	50.186.196	1.998	3.666	2.128	400	70	421	100	117	14
OCTOBER	3.853	50.793.220	2.117	3.827	2.299	379	62	426	94	131	8
NOVEMBER	3.843	51.341.274	2.133	3.813	2.220	358	49	428	119	155	7
DECEMBER	3.531	47.012.468	1.975	3.491	2.055	335	53	459	114	130	8
TOTAL	**45.529**	**582.468.334**	**24.505**	**44.928**	**26.212**	**4.295**	**976**	**5.587**	**1.540**	**1.618**	**89**

TABLE (60) : RESUME OF STATISTICS OF SHIPS PASSING THROUGH CANAKKALE STRAIT (2014)

MONTHS	TOTAL SHIPS	TOTAL GT	WİTH PILOT	SP-1	TRANSIT	BIGGER THAN 200M	SMALLER THAN 500 GT	NUMBER OF TANKERS			TOWİNG
								TTA	LPG-LNG	TCH	
JANUARY	3.613	59.106.731	1.477	3.593	2.259	453	41	554	116	178	14
FEBRUARY	3.098	52.788.596	1.404	3.076	1.798	419	27	423	117	153	8
MARCH	3.762	61.487.029	1.602	3.750	2.335	475	37	516	136	183	9
APRİL	3.836	62.414.318	1.619	3.799	2.347	460	44	496	116	216	9
MAY	3.964	65.372.278	1.724	3.927	2.361	490	43	561	130	192	9
JUNE	3.557	61.034.800	1.629	3.526	1.982	472	53	473	91	176	6
JULY	3.721	66.517.813	1.659	3.676	2.158	520	71	484	92	203	9
AUGUST	3.742	70.300.075	1.667	3.709	2.352	586	35	479	76	190	11
SEPTEMBER	3.559	67.206.872	1.596	3.520	2.112	550	40	468	76	159	6
OCTOBER	3.737	68.608.881	1.651	3.714	2.290	540	49	462	72	166	7
NOVEMBER	3.546	65.521.701	1.541	3.525	2.205	489	31	460	90	179	12
DECEMBER	3.447	61.272.662	1.538	3.423	2.058	448	41	499	94	174	16
TOTAL	43.582	761.631.756	19.107	43.238	26.257	5.902	512	5.875	1.206	2.169	116

TABLE (61) : A STATE STATISTIC FOR SHIPS WITH PILOT BY MONTHS AND BY THEIR DIMENSIONS – ISTANBUL STRAIT (2014)

MONTHS	BIGGER THAN 300 M		BETWEEN 250-300M		BETWEEN 200-250M		BETWEEN 150-200M		BETWEEN 100-150M		SMALLER THAN 100M	
	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT
JANUARY	0	0	116	116	209	208	802	651	1.482	663	1.202	335
FEBRUARY	0	0	110	110	195	194	711	587	1.175	548	990	283
MARCH	0	0	111	111	257	257	864	686	1.526	691	1.210	318
APRİL	0	0	108	108	228	228	837	677	1.629	730	1.298	399
MAY	0	0	112	112	232	232	836	674	1.585	715	1.335	389
JUNE	0	0	109	109	220	220	767	609	1.414	672	1.179	366
JULY	1	1	116	116	266	265	867	697	1.336	648	1.228	357
AUGUST	1	1	120	119	312	311	954	768	1.338	641	1.205	360
SEPTEMBER	0	0	122	122	278	278	847	671	1.191	557	1.271	370
OCTOBER	0	0	112	112	267	266	883	725	1.398	665	1.193	349
NOVEMBER	0	0	112	112	246	245	962	782	1.343	627	1.180	367
DECEMBER	0	0	116	116	219	219	824	680	1.317	622	1.055	338
TOTAL	**2**	**2**	**1.364**	**1.363**	**2.929**	**2.923**	**10.154**	**8.207**	**16.734**	**7.779**	**14.346**	**4.231**

TABLE (62) : A STATE STATISTIC FOR SHIPS WITH PILOT BY MONTHS AND BY THEIR DIMENSIONS – CANAKKALE STRAIT (2014)

MONTHS	BIGGER THAN 300 M		BETWEEN 250-300M		BETWEEN 200-250M		BETWEEN 150-200M		BETWEEN 100-150M		SMALLER THAN 100M	
	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT		TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP	WİTH PILOT RECIPIENT	TOTAL SHIP
JANUARY	8	8	178	167	267	215	1.006	550	1.318	341	836	196
FEBRUARY	8	8	161	151	250	211	891	540	1.067	331	721	163
MARCH	9	9	167	154	299	243	1.044	595	1.381	401	862	200
APRİL	16	16	173	162	271	225	1.053	628	1.416	368	907	220
MAY	24	24	189	179	277	230	1.059	656	1.426	409	989	226
JUNE	22	22	173	173	277	230	976	603	1.258	399	851	202
JULY	26	26	181	179	313	261	1.075	600	1.188	377	938	216
AUGUST	28	28	193	185	365	294	1.123	630	1.176	354	857	176
SEPTEMBER	25	25	195	184	330	260	1.085	606	1.039	323	885	198
OCTOBER	22	22	188	183	330	273	1.118	640	1.207	363	872	170
NOVEMBER	13	13	177	174	299	242	1.141	638	1.113	324	803	150
DECEMBER	11	11	178	170	259	216	1.099	635	1.130	338	770	168
TOTAL	212	212	2.153	2.061	3.537	2.900	12.670	7.321	14.719	4.328	10.291	2.285

TABLE (63) : A STATISTICS OF DIFFUSION FOR SHIPS PASSING THROUGH ISTANBUL STRAIT BY MONTHS AND THEIR TYPES (2014)

TYPE	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	TOTAL
BBU(B/C)	555	469	580	578	547	488	626	736	652	704	707	621	**7.263**
BOR	0	0	0	0	0	0	0	0	0	0	0	0	**0**
DDR	0	0	3	0	0	0	0	0	0	0	0	0	**3**
CHS	1	0	1	0	0	1	0	0	1	0	0	0	**4**
FFS	0	0	0	0	0	0	0	0	0	3	0	0	**3**
GGC(K/Y)	2.081	1.637	2.101	2.212	2.265	1.972	1.969	2.021	1.929	2.067	2.040	1.813	**24.107**
GRF (REEF.)	16	7	9	7	3	6	4	3	4	2	2	2	**65**
LPG	145	131	167	158	159	120	125	107	100	94	119	114	**1.539**
MLV(L-S)	24	39	42	39	45	41	41	42	46	19	6	7	**391**
MPR(YOLCU)	19	47	47	47	51	66	70	66	82	82	39	35	**651**
MVC	8	7	10	10	9	8	13	5	7	5	7	4	**93**
NAV	15	17	10	31	21	18	24	20	29	17	13	19	**234**
OBA	5	1	2	2	0	0	2	0	0	0	0	0	**12**
OFY	0	0	2	2	0	0	0	0	0	0	0	0	**4**
OSY	0	2	2	4	2	0	0	2	6	1	8	0	**27**
OTH	10	6	16	18	12	21	12	12	19	20	6	13	**165**
RRE	4	3	0	2	1	4	1	3	2	4	0	3	**27**
TCH	123	132	135	149	150	147	124	125	110	131	155	130	**1.611**
TTA	513	400	516	505	499	464	464	492	428	426	428	459	**5.594**
UCC	242	230	265	276	284	279	277	258	227	223	258	254	**3.073**
URC	28	33	45	41	37	36	47	21	40	33	38	32	**431**
XTG	21	20	15	19	15	18	15	17	27	22	17	25	**231**

TOTAL	**3.810**	**3.181**	**3.968**	**4.100**	**4.100**	**3.689**	**3.814**	**3.930**	**3.709**	**3.853**	**3.843**	**3.531**	**45.528**

TABLO (64) : A STATISTICS OF DIFFUSION FOR SHIPS PASSING THROUGH CANAKKALE STRAIT BY MONTHS AND THEIR TYPES (2014)

TYPE	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	TOTAL
BBU(B/C)	584	498	588	622	584	523	623	763	673	728	681	658	**7.525**
BOR	0	0	0	0	0	0	0	0	0	0	0	0	**0**
CHS	0	0	4	0	0	1	0	0	1	0	0	0	**6**
DDR	0	1	1	0	1	2	0	0	2	0	2	2	**11**
FFS	0	1	0	1	8	6	2	2	0	3	0	2	**25**
GGC(K/Y)	1.483	1.232	1.573	1.562	1.631	1.433	1.448	1.438	1.340	1.473	1.390	1.294	**17297**
GRF (REEF.)	19	14	12	11	8	10	8	11	14	7	6	4	**124**
LPG	116	117	136	116	130	91	92	76	76	72	90	94	**1206**
MLV(L-S)	28	40	44	39	48	42	42	46	52	20	6	9	**416**
MPR(YOLCU)	8	6	3	40	84	85	89	90	11	121	35	20	**592**
MVC	30	37	42	25	15	34	31	24	27	28	28	32	**353**
NAV	15	18	10	27	23	22	22	19	28	16	13	20	**233**
OFY	0	0	3	1	0	0	0	0	0	0	1	0	**5**
OSY	1	4	2	2	4	0	1	1	5	0	9	2	**31**
OTH	18	17	36	40	36	49	64	47	51	44	26	35	**463**
RRE	4	3	2	2	4	4	3	4	1	7	2	1	**37**
TCH	178	153	183	216	192	176	203	190	159	166	179	174	**2169**
TTA	554	423	516	496	561	473	484	479	468	462	460	499	**5875**
UCC	383	354	403	413	407	392	374	378	353	364	383	391	**4595**
URC	160	160	182	194	204	184	204	156	180	201	208	172	**2205**
XTG	32	20	22	29	24	30	31	18	18	25	27	38	**314**
TOTAL	**3.613**	**3.098**	**3.762**	**3.836**	**3.964**	**3.557**	**3.721**	**3.742**	**3.459**	**3.737**	**3.546**	**3.447**	**43.482**

CHAPTER V

THE TURKISH STRAITS AND MARITIME TRAFFIC SYSTEMS

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

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

This 164 nm long seaway, starting from the north entrance of Istanbul Strait and ending at the south exit of Çanakkale Strait, is a region that should be given with high importance both from geomorphological and hydrographical aspects, especially for having 12 sharp turning points with 45º in front of Istanbul Strait-Kandilli and 80º in front of Yeniköy and with complex currents which reach to a relative speed of 4-5 knots.
The Strait of Istanbul is unique as it runs through the city of İstanbul with more than 15 million inhabitants. The shoreline of Istanbul is densely populated. Vessels approach frequently as close as 50 meters to these inhabited areas. Excluding the vessel traffic, the local traffic such as leisure crafts and fishing vessels, daily domestic vessel movement alone in the Strait of Istanbul is more than 2500. More than 2.5 million people are daily in a movement at sea crossing from one side to another in Istanbul. Istanbul is a city with 3000 years of history. It is declared as a “world heritage city” by UNESCO.

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

The number of vessels that passed through the Turkish Straits between the years 1997-2014 are shown in Table ( )

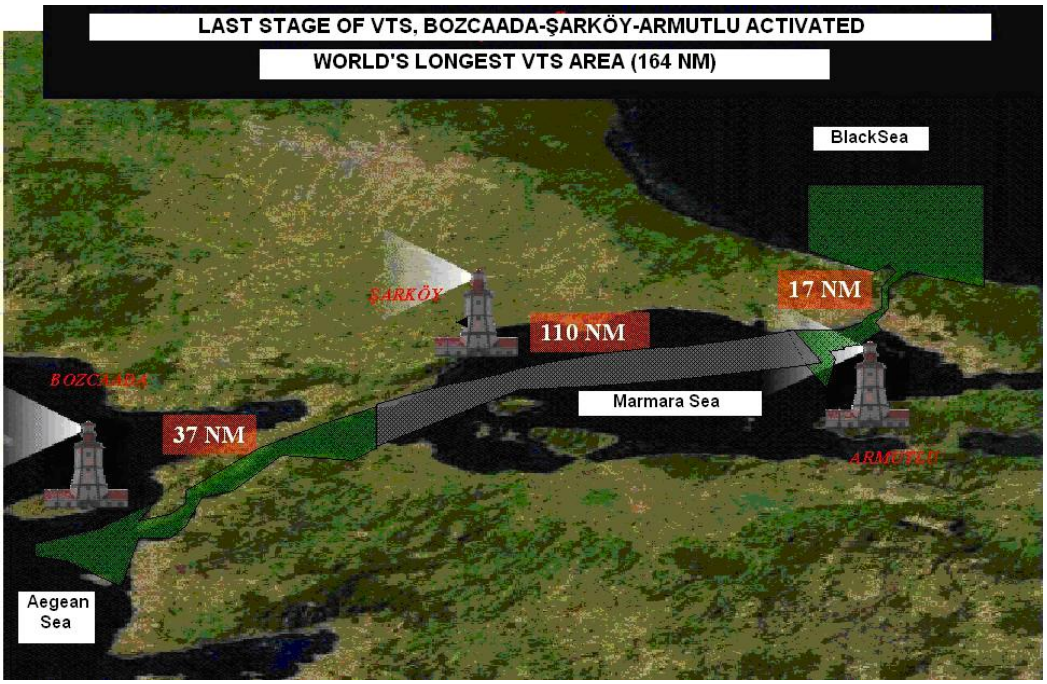
In the year 2014, 45.529 ships in total have passed through the Istanbul Strait with a monthly average of 3.794 ships; 43.582 ships in total have passed through the Çanakkale Strait with a monthly average of 3.631 ships. Daily averages are 121 ships for İstanbul Strait and 121 ships for Çanakkale Strait.

In addition to these figures, approximately more than two million people pass across the İstanbul Strait daily by small passenger vessels. This value is four times higher than Suez Channel and three times than Panama Channel. This density of traffic between Asia and Europe increases by the population of İstanbul which has reached nearly 15 million. The statistics of ships passing through İstanbul and Çanakkale Straits, according to length, piloting and on country basis are shown in the following Tables.

Turkish Straits Vessel Traffic Services - Additional Traffic Monitoring Stations

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

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



Upgrade of Turkish Straits Vessel Traffic Services System

In order to continue to operate the mentioned system in an optimum way and without interruption; a need has appeared for the renewal and betterment of the software and hardware of sub system of data processing and also with the purpose of adding to the system the necessary applications, additional equipments, operational and management characteristics, plans have been made for adjudication concerning the said work.

Vessel Traffic Management System (VTMS) Project

Within the scope of the Project for Vessel Traffic Management System (VTMS) the installation of which is continued by the related Ministry, it is planned that Regional Vessel Traffic Services (VTS) be built in order to increase the navigation safety in İzmit, İzmir, Iskenderun and Mersin regions in which vessel traffic is intense and risky. İzmit and İzmir VTS will become operational in 2014.

Regional VTS Systems; it is aimed to increase the sea traffic safety and efficiency and to monitor, arrange, organize and manage the vessel traffic movements in interaction with vessels whit a view to protecting the sea environment as well as to provide one or more of the services of information, navigation assistance and traffic organization in some or all of the regional VTS areas. Regional VTS Systems consist of 24 Traffic Surveillance Posts and 3 Vessel Traffic Services Centers.
Via the Vessel Traffic Management Center (VTMC) to be established in Ankara, the following shall be ensured

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

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

In addition, such institutions as Navy, Coast Guard Command, General Directorate of Security Affairs, Ministry of Customs and Trade etc. Can also send and receive data to/from VTMC and carry out operations via VTMC. The Factory Acceptance Tests for the electrical and electronic equipment and software of the system has been completed, the devices to be used in the system have been shipped in the country: 24 TMS and 3 VTMC construction progress are completed.

Automatic Identification System (AIS)

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

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

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

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

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

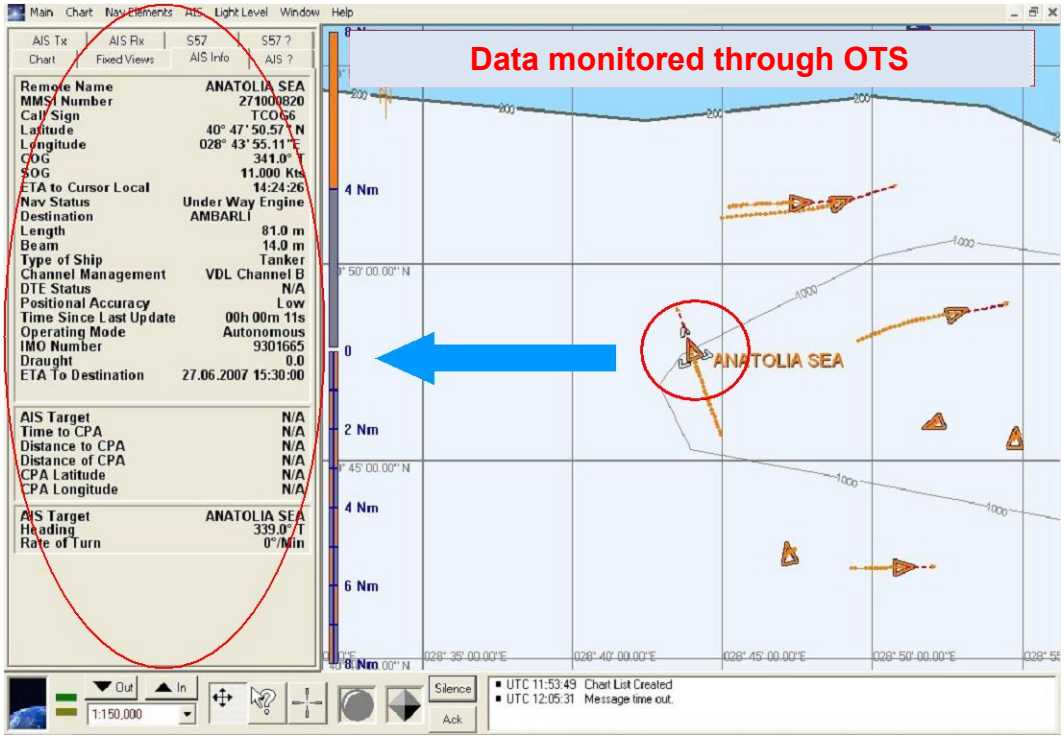
It is very important that the system infrastructure is installed on an elevated location in order to allow that the OTS Base Stations to be used between the vessels and the land have an effective coverage. Since such system operates on VHF band, it is essential that the antennas have optical sight of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

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

Data Monitored Through OTS

Static Data

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



Dynamic Data

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

Navigational Data

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

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

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

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

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

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

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

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

were achieved through OTS.

OTS Class-B CS

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

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

Long Range Identification and Tracking (LRIT) System

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

The intense studies carried out by the Maritime Safety Committee (MSC) of IMO for this system planned to track vessels at long distances through satellites were eventually finalized upon working on and completing the LRIT performance standards and functional requirements developed by COMSAR Sub-committee during the 81st Period Meeting held in May, and the LRIT System was accepted. Thus, the following vessels navigating internationally can be tracked:

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

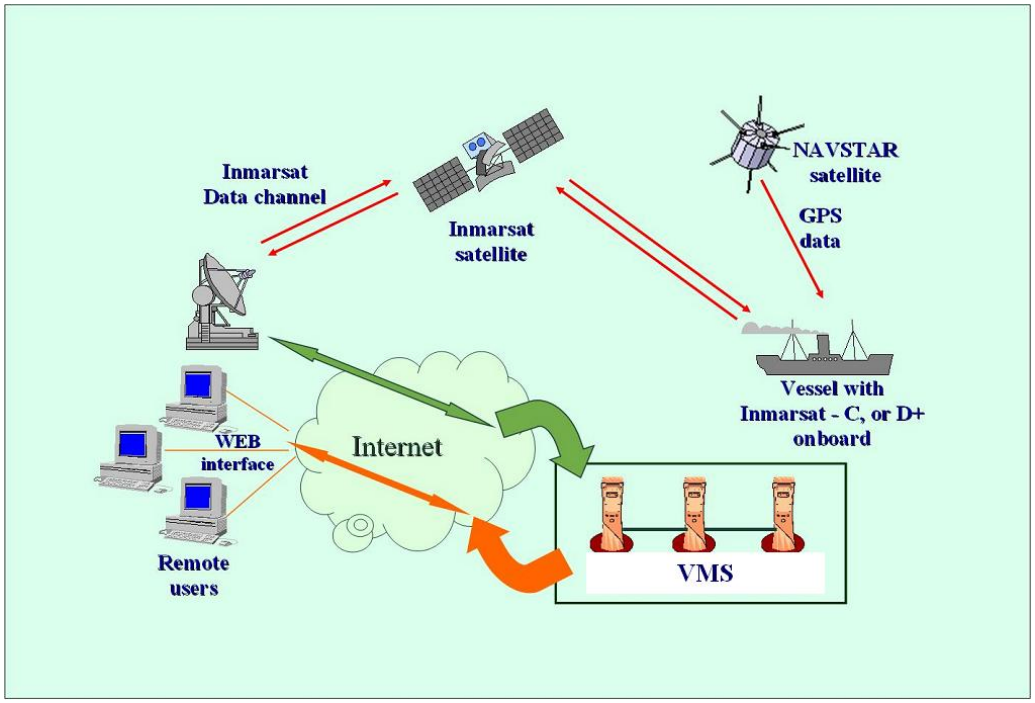
IMO member states will be able to receive long range identification and tracking information of the vessels with respect to security and other issues agreed by IMO. The responsibilities of countries as flag, port and coast states are defined.

Owing to LRIT, the countries can interrogate;

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

within the framework of rules set by IMO.

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



Operating Principle of LRIT

Each Administration shall decide on choosing the LRIT Data Center where it shall provide the LRIT information of the vessels under its flag. Each administration shall inform the following data of the vessels under its flag, identified to provide the LRIT information of to the LRIT Data Center it chooses, and shall keep such information up-to-date.

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

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

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

LRIT Current Situation

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

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

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

Main Search and Rescue Coordination Center (MSRCC)

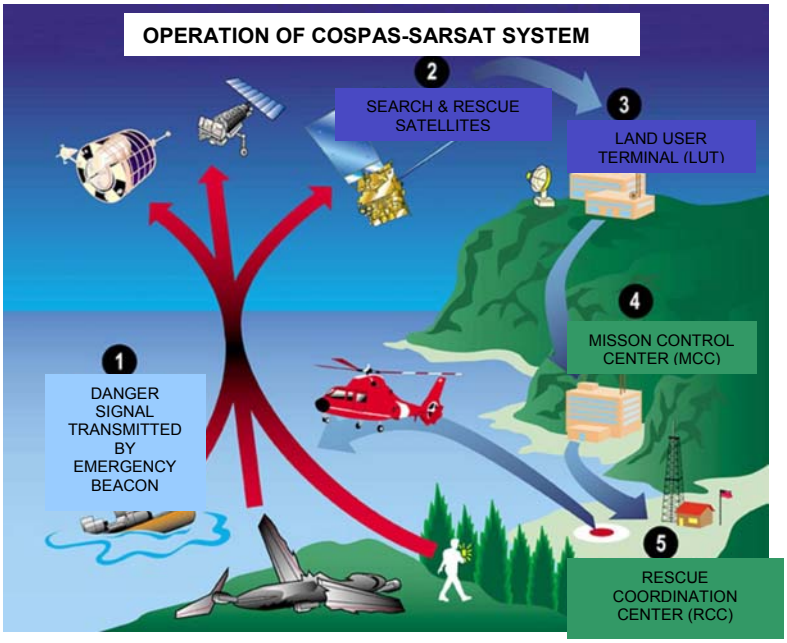
The Cospas-Sarsat System

The Cospas-Sarsat system is an international system ensuring detection via COSPAS and SARSAT satellites of the location of accident where any vessel, aircraft or persons have been engaged in an accident which notified by signals they transmitted via 406 MHz frequency, and promptly taking of action for rescue required.

The COSPAS-SARSAT system consists of two basic units; space segment and ground segment;

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

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



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

Cospas-Sarsat System in TURKEY

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

2 Units of LEOLUT and 1 Unit of GEOLUT Unit:

Installed at Esenboğa Airport.

LEOLUT

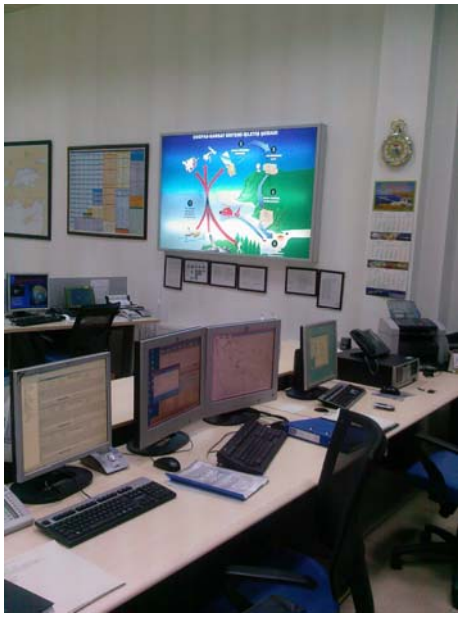
It is a terrestrial receiver station. It receives accident signals (460 MHz) transmitted by satellites by tracing the satellites, and establishes the Doppler curves by separating the signals from the noise. It calculates the satellite locations using the Doppler curves to locate the accidents (A&B solutions).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

GEOLUT

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

Turkish Mission Control System (TRMCC)

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



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

4 units of RCC Units:

1 unit of RCC is installed at the Main Search and Rescue Coordination Center of The Ministry of Transportation, Maritime Affairs and Communications.

1 unit of RCC is installed at the Turkish Coast Guard Command
1 unit of RCC is installed at Atatürk Airport
1 unit of RCC is installed at Esenboğa Airport.

MEOSAR System

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

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

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

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

With the MEOSAR system fully commissioned,

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

With scope of MEOSAR System satellites are being launched by USA (GPS/DASS), European Union (GALILEO) and Russia (GLONASS) (*it is planned to use about 80 satellites when the system becomes fully operational*) and through the instrumentality of such satellites, the countries which have established their MEOLUTs has already started to collect analytic data.

MEOSAR System is expected to replace the Cospas-Sarsat system completely by the end of 2010s.

CHAPTER VI

MARINE TOURISM

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

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

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

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

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

Marine tourism revenue is 25 % 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 5th city in the world for Composit Boat Building in 2008
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 (64): MARINE TOURISM VESSELS (2014)

	Number of Enterprices	**Number of Vessels**	**Number of Bed Cappacity**
Turkish Flag Yacht with Tourism Administration Certificate	857	1.529	15.312
Foreign Flag Yacht with Tourism Administration Certificate	26	871	6.911
General total	883	2.400	**22.223**
	Number of	**Number of**	**Number of**

	Enterprices	Vessels	Passenger
Day Trip Boat with Tourism Administration Certificate	938	1.051	68.629
	Number of Enterprices	**Number of Vessels**	**Summer/Winter Cappacity**
Restaurant Boat with Tourism Administration Certificate	45	45	15.992 person /10.047 person

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 (65): Marine Tourisim Facility with Tourism Administration Certificate (2014)

Business Tourism Documentation of Yacht Harbour

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

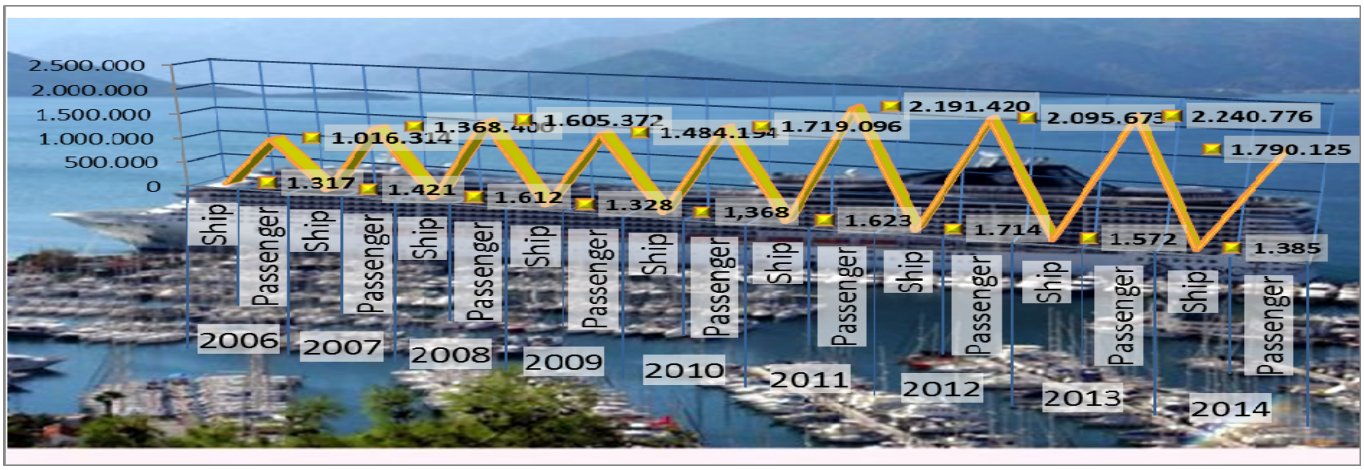
GRAND TOTAL			**6421**	
Business Tourism Documentation of Yacht Slipway				
1-Atabay Tourism	Yacht Slipway Facility	Gebze / KOCAELİ	-	60
2-Ayvalık Marina	Yacht Slipway Facility	Ayvalık / BALIKESİR	-	140
3-Albatros Marina	Yacht Slipway Facility	Marmaris / MUĞLA	40	48
4-Yat Lift	Yacht Slipway Facility	Bodrum/MUĞLA		400
5-Ağanlar	Yacht Slipway Facility	Bodrum/MUĞLA	**-**	200
6-Göcek Marina	Yacht Slipway Facility	Fethiye/MUĞLA	-	156
TOTAL			**40**	**1004**
GRAND TOTAL			**1044**	
Yacht Harbour Investment Tourism Documantation				
1-Alacatur Turistik Tesisleri Yacht Port	Secondary Yacht Port	Turgutreis / MUĞLA	40	12
2-Meersea Körmen Yacht Port	Secondary Yacht Port	Datça / MUĞLA	246	56
3-Martı Marina ve Yat İşletmeleri A.Ş.	Secondary Yacht Port	Marmaris / MUĞLA	301	70
4-Kalkedon Marina	Secondary Yacht Port	Bodrum / MUĞLA	200	200
5-Bodrum Yalıkavak Yacht Port Palmarin	Main Yacht Port	Bodrum / MUĞLA	336	100
6-Alaçatı Yacht Port	Main Yacht Port	Çeşme/İZMİR	260	250
7-Ataport Yacht Port	Main Yacht Port	Zeytinburnu/İSTANBUL	1000	100
8-Alanya Yacht Port	Main Yacht Port	Alanya/ANTALYA	287	160
9-Marintürk Exclusive Göcek	Yacht Berthing Space	Göcek-Fethiye/MUĞLA	96	-
10-Marintürk Göcek Village Port	Secondary Yacht Port	Göcek-Fethiye/MUĞLA	116	200
11-Mandalya Yacht Berthing Space	Yacht Berthing Space	Milas/MUĞLA	50	-
12-Çeşme Yacht Port	Main Yacht Port	Çeşme/İZMİR	377	100
13-Burhaniye Yacht Port	Secondary Yacht Port	Burhaniye/BALIKESİR	210	100
14-Yalova Yacht Port SETUR	Main Yacht Port	YALOVA	240	80
15-Sığacık Yacht Port TEOS Marina	5 Anchored Yacht Port	Seferihisar/İZMİR	400	80
16-Skopea Marina	Dock	Göcek/MUĞLA	80	-
TOTAL			**4239**	**1508**
GRAND TOTAL			**57477**	
Location of Documents Yacht Tourism Investment				
1-Marmaris Marina	Yacht Slipway Facility	Marmaris/MUĞLA	-	200
2-Yacht Marin	Yacht Slipway Facility	Marmaris/MUĞLA	-	100
3-Ege Yacht	Yacht Slipway Facility	Milas/MUĞLA	-	15
TOTAL			-	**315**
GRAND TOTAL			-	**315**
Source:Ministry of Culture and Tourism 03.12.2014				

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 AI Development Program.

GRAPH 61: Statistics of Cruises and Passengers Arrived at Turkish Ports Between 2006-2014



Cruise Ports of Turkey

- İstanbul
- İzmir
- Kuşadası
- Fethiye
- Marmaris
- Bodrum
- Antalya
- Alanya

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

TABLE 66 Number of Transit Passengers Coming by Cruise Ships (Source: Minister of Transport, Maritime Affairs and Com.)

PORT NAME	2006		2007		2008		2009		2010		2011		2012		2013	
	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHİP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER
Alanya	114	80.440	124	93.937	84	57.000	73	50.285	2	1.071	22	25.743	22	25.743	53	40.843
Antalya	32	13.015	34	15.680	41	25.057	23	12.549	41	103.859	64	127.250	55	159.430	64	163.575
Anamur	0	0	0	0	0	0	0	0	0	0	4	351	1	63	0	0
Bartın	-	-	-	-	8	957	10	941	4	555	2	208	9	882	15	2.071
Bodrum	66	10.478	63	9.892	126	52.862	87	38.414	89	31.700	82	46.031	131	52.832	114	28.546
Çanakkale	24	5.008	23	5.207	31	8.776	33	8.712	17	7.670	23	4.371	25	4.184	36	7.467
Çeşme	-	-	-	-	3	1.819	1	817	16	9247	1	89	25	4.787	54	62.741
Datca	-	-	-	-	1	207	3	1.041	3	778	0	0	0	0	0	0
Dikili	23	3.990	13	2.631	29	10.424	13	6.592	26	15.401	34	17.485	24	4.865	21	7.655
Fethiye	67	3.566	4	948	13	4.217	8	2.615	5	879	5	1.975	11	1.969	4	1.067
Göcek	-	-	-	-	6	1.121	10	1.532	16	2.274	7	1.216	6	1.038	2	252
Güllük	-	-	-	-	19	2.747	5	1.172	1	279	3	1.692	7	1.079	7	476
İskenderun	-	-	-	-	3	819	2	1.884	1	106	5	1.308	0	0	0	0
İstanbul	306	273.553	340	422.896	404	489.544	313	476.541	342	508.246	420	627.897	382	596.027	381	689.417
İzmir	105	184.797	122	287.357	133	318.451	129	315.454	159	378.266	262	493.533	288	552.764	190	486.493
Kaş	-	-	-	-	6	600	4	1.341	8	1.317	3	507	7	1.018	3	1.152
Kemer	-	-	-	-	1	37	0	0	6	602	0	0	0	0	0	0
Kuşadası	471	368.696	613	466.677	601	518.872	506	462.746	517	493.911	568	662.456	464	564.317	428	577.685
Marmaris	83	65.265	64	60.039	70	101.874	74	81.472	84	146.531	84	170.021	88	110.279	112	152.685
Mersin	-	-	-	-	4	941	3	1.583	1	106	3	416	2	774	3	1.381
Mudanya	-	-	-	-	1	482	4	1.309	1	24	5	922	0	0	2	414
Samsun	9	2.661	8	186	5	596	9	1.524	4	825	3	208	7	1.190	12	1.281
Sinop	-	-	-	-	6	3.136	14	7.861	7	7.098	9	4.088	10	3.708	16	7.460
Taşucu	-	-	-	-	1	18	3	440	2	201	4	805	4	709	0	
Trabzon	17	4.845	13	2.950	15	4.813	18	7.369	14	7.952	13	6.267	18	8.015	24	8.115
Tuzla	-	-	-	-	1	2	0	0	2	0	0	0	0	0	1	0
Yalova	-	-	-	-	-	-	-	-	-	-	-	-	1	0	0	0
TOTAL	1.317	1.016.314	1.421	1.368.400	1.612	1.605.372	1.328	1.484.194	1.368	1.719.098	1.623	2.191.420	1.587	2.095.673	1.572	2.240.776

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

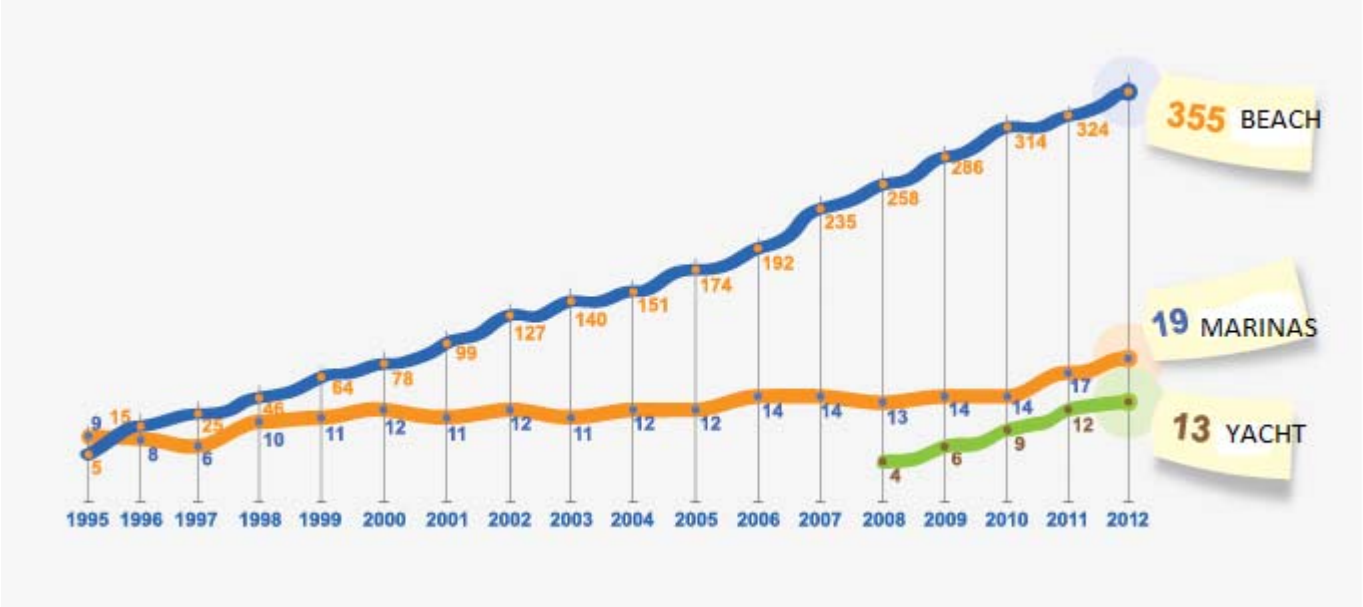
Harbour Masters	CRUISE SHIP				CRUISE PASSENGER			
	CRUISE SHIP	PASSENGER SHIP	OTHERS SHIP	TOTAL	IN COMING	OUT GOING	TRANSIT	TOTAL
ALANYA	20	3	0	23	37	32	18.487	18.556
ANTALYA	19	39	0	58	83.821	84.318	7.639	175.778
BARTIN	17	3	0	20	1	1	2.822	2.824
BODRUM	61	17	0	78	139	193	32.547	32.879
ÇANAKKALE	32	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

Source :

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 67 : 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

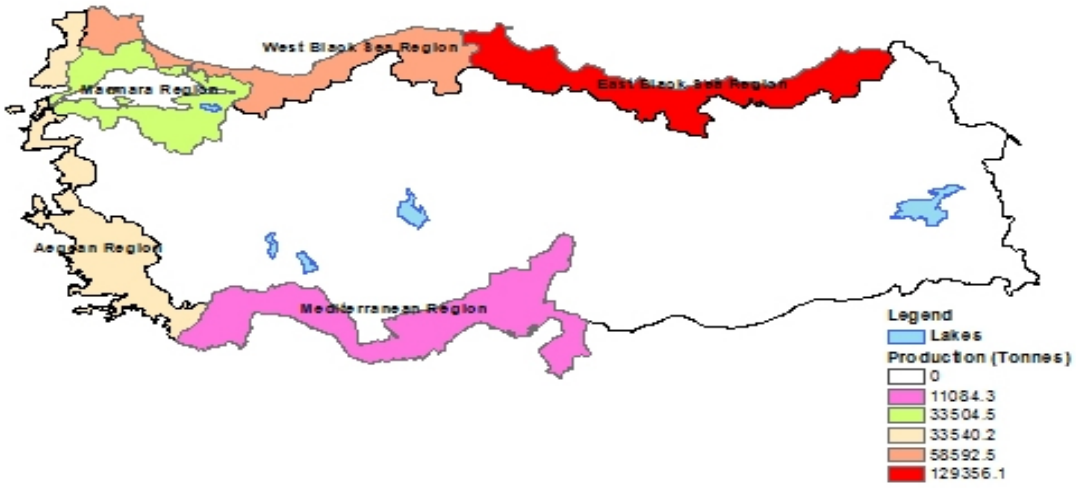
TURKISH FISHING SECTOR

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 species. Turkey has a share of 0.04 % in the total world water production.

60-80 % of Turkey's water products consist of pelagic fish. Pelagic 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 62: Quantity of Captured Sea Product (2014)



Production of water products, especially 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 strength of catch. The production of fish products realized approximately as 180.000 tons has increased above 700.000 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 occurred as 537 thousand 345 tones. 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 tones, aquaculture production occurred as 235 thousand 133 tones. 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 (69): Quantity of fishery products, 2014

(Tones)

	2013	Share (%)	**2014**	Share (%)	Change (%)
Fishery products	**607 515,2**	**100,0**	**537 344,6**	**100,0**	**-11,6**
Fishery products by catching	**374 121,3**	**61,6**	**302 211,6**	**56,2**	**-19,2**
Sea fish and other sea products	**339 046,9**	**55,8**	**266 077,6**	**49,5**	**-21,5**
Sea fish	295 167,9	48,6	231 058,3	43,0	-21,7
Other sea products	43 879,0	7,2	35 019,3	6,5	-20,2
Inland water products	**35 074,4**	**5,8**	**36 134,0**	**6,7**	**3,0**
Aquaculture	**233 393,9**	**38,4**	**235 133,0**	**43,8**	**0,7**

Source ; Turk Stat, Fishery Products, 2014

TABLE (70) Fishery Statistics By The Year

	Sea Products (Tons)	Aquaculture Production (Tons)	Freshwater Products (Tons)
2002	522 744	61 165	43 938
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

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

In 2013;

Between the years 2002-2013 aquaculture production of our country has increased 281 %
Total Number of Aquaculture Facility is 2.353, and their total capacity is 464.660 tons per year.

Production of Sea and Inland Water Aquaculture
In 2002 Total 61,165 (Tons)
In 2013 Total 233,394 (Tons)

In 2012;

Fishery production decreased by 8.34% in 2012

Fishery production decreased by 8.34% in 2012 with respect to the previous year and became 644 852 tons. The total fishery production consisted of sea fish by 48.95%, other sea products by 12.51%, and inland water products by 5.6% and aquaculture by 32.94%.

In 2012, capture of fishery products decreased by 15.99%, while aquaculture production increased by 12.51%

The capture production was 432 442 tons and aquaculture production became 212 410 tons. 52.52% of the amount of aquaculture production took place at the inland waters and 47.48% at the seas. The most important types produced at the inland waters are trout by 52.42%, sea bass by 30.84% and sea bream by 14.47% at sea.

The capture of marine production decreased by 17.03% with respect to the previous year

The capture of marine production showed a decrease of 17.03% and became 396 322 tons. Of all the marine production, East Black Sea is the first by the ratio of 41.31%. West Black Sea follows it by 30.02%, Marmara by 12,26%, Aegean by 9.41% and Mediterranean by 7%.

Anchovy production which is one of the important types of sea fish was 163 982 tons, showing a decrease of 28.23% with respect to the previous year.

In 2011;

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

Capture of fishery production increased 5,93%, aquaculture 12,95% in 2011
The capture production was 514 755 tons and aquaculture production became 188 790 tons. 53,21% of the amount of aquaculture production took place at the inland waters and 46,79% at the seas. The most important types produced at the inland waters are trout by 53,1%, sea bass 24,9% and sea bream by 17,05% at sea.

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

Anchovy production which is one of the important types of sea fish was 228 491 tons, showing a decrease of 0,23%. Sprat production with 87.141 tons has a ratio with 20,16% after anchovy.

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

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

TABLE (72) : Quantity of Fishery Products 2012 Products, 2012 Tons

	2011	Share (%)	**2012**	Share (%)	Change (%)
Fishery products	**703 545,2**	**100,00**	**644 852,0**	**100,00**	**-8,34**
Fishery products by catching	**514 755,2**	**73,17**	**432 442,0**	**67,06**	**-15,99**
Sea fish and other sea products	**477 658,4**	**67,89**	**396 322,0**	**61,46**	**-17,03**
Sea fish	432 246,0	61,44	315 636,5	48,95	-26,98
Other sea products	45 412,4	6,45	80 685,5	12,51	77,67
Inland water products	**37 096,8**	**5,27**	**36 120,0**	**5,60**	**-2,63**
Aquaculture	**188 790,0**	**26,83**	**212 410,0**	**32,94**	**12,51**

Source; TurkStat, Fishery Statistics, 2012

In 2010

Fishery production decreased by 3,58% in 2010 with respect to the previous year and became approximately 623 thousand tons. The total fishery production consisted of sea fish by 61,12%, other sea products by 7,13%, inland water products by 6,29% and aquaculture by 25,47%.

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

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

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

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

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

Increase in Capture Production and Aquaculture Production 2010

Increase in fishery production by 4,83%

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

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

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

Increase in marine production by catching by 4,85%

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

Changes in fish species

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

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

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

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

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

TABLE 73: Production of Fisheries

	Sea Products (**Ton** - Tons)	Aquaculture Production (**Ton** - Tons)	Freshwater Products (**Ton** - Tons)
2001	484 410	67 244	43 323
2002	522 744	61 165	43 938
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

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

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 19.669 (2014 year) registered fishing boats.
The fishing technology in Turkey is considered to be efficient. Seaborne fishing is being done by artisanal fishing (extension meshes, drag side meshes, parakeet, 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 than 12 meters. The Black Sea Region has the major share in fishing sector in Turkey with 1640 km coast line: there are 202 fisherman shelters and slips. In İstanbul, there are 44 shore facilities, consisting of 8 ports, 26 fisherman shelters, and 10 slips.

Fishing vessels in Turkey are generally small vessels, which are suitable for shore fishing. There are 16,650 fishing vessels in total and 83 % of these boats consists of vessels of 5-12 meters which perform shore fishing.
Production distribution of large scale fishermen, collected through survey and having vessels bigger than 10 meters, which have an important share in capture production and small scale fishermen,collected through survey, having vessels equal to or less than 10 meters

TABLE 74: By Nature of Fishing Vessels (2008-2012)

Fishing vessels carrying out fishing activities by qualities, 2008-2012

	2008	2009	2010	2011	2012
Operating type					
Trawler	543	552	669	700	686
Purse seiner	526	505	485	485	440
Trawler-Purse seiner	469	431	337	241	219
Carrier vessels	213	156	130	201	213
Other	15 410	15 201	15 029	12 673	12 766
Material of construction					
Wood	16 007	15 748	15 497	13 262	13 294
Sheet iron	1 071	1 014	1 020	977	975
Fiberglass	83	83	133	61	55
- Group of tonnage (groston)					
1 - 4	13 155	12 783	12 423	10 154	10 639
5 - 9	1 753	2 033	2 132	2 014	1 632
10 - 29	1 054	902	952	1 004	985
30 - 49	393	376	373	372	333
50 - 99	371	368	413	381	373
100 - 199	291	272	247	248	234
200 - 499	127	97	98	113	114
500+	17	14	12	14	14
Group of horsepower (kw)					
1 - 9.9	6 141	6 490	6 026	5 095	4 956
10 - 19.9	2 651	2 508	2 407	1 790	1 877
20 - 49.9	3 297	3 402	3 629	2 790	2 936
50 - 99.9	2 147	1 924	1 960	2 075	2 031
100 - 199.9	1 598	1 327	1 363	1 268	1 210
200 - 499.9	826	803	868	855	913
500+	501	391	397	427	401
Group of length (meters)					
1 - 4.9 (1)	159		-	-	-
5 - 7.9	9 448	9 312	9 196	7 293	7 377
8 - 9.9	4 855	4 947	4 871	4 512	4 409
10 - 11.9	666	748	728	662	680
12 - 14.9	664	585	603	607	633
15 - 19.9	467	422	420	400	396
20 - 29.9	632	623	609	593	595
30 - 49.9	255	198	215	223	225

50+	15	10	8	10	9
Situation of generator usage (kw)					
Without generator	16 311	16 162	15 938	13 565	13 577
Power group of generator					
1 - 5	76	40	37	59	40
6 - 10	78	65	44	59	48
11 - 20	49	43	37	71	59
21 - 50	170	145	169	189	182
51 - 99	222	187	197	136	168
100+	255	203	228	221	250
Situation of size of deep freeze depot (m^3)					
Without deep freeze depot	16 266	15 963	15 605	13 156	13 403
Size of deep freeze depot group					
1 - 10	541	420	635	654	436
11 - 20	177	244	208	314	311
21 - 50	122	169	143	140	141
51+	55	49	59	36	33

(1) The length of vessel 1-4.9 is out of coverage f

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 seaborne production facilities. Head Sea Bream and the Sea Bass facilities are located generally at Southern Aegean 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 %.

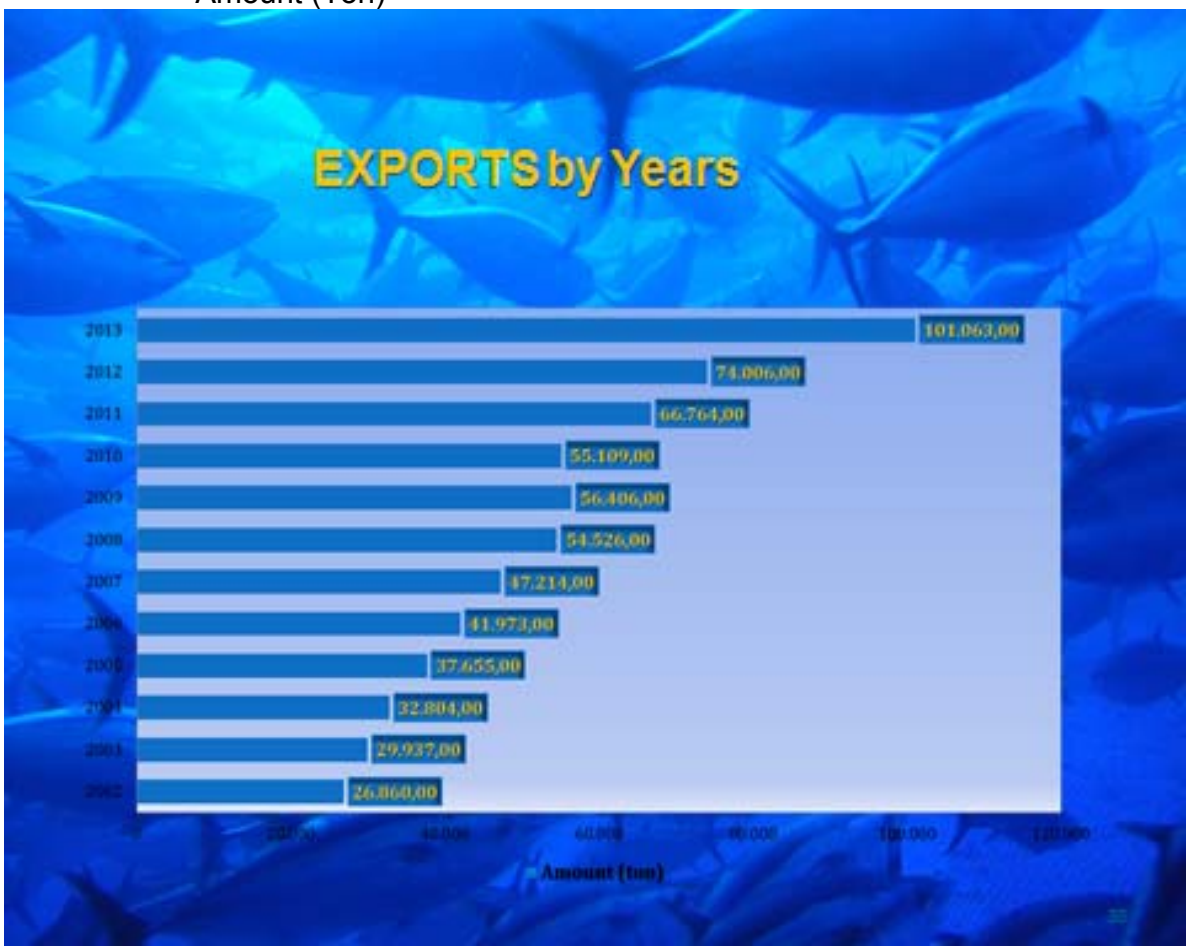
26,860 in 2002 (tons), 74,006 in 2012 the exports (tons), reaching the last eleven years, according to the amount of exports increased nearly 170 % has been achieved. Seafood export figures available are examined, the amount and value of our exports in the past year has continued to increase with benchmarks.

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 2013, 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 101063 tons in 2013; although it was 26860 tons in the year 2002.

GRAPH 63: Exports of Water Production (2002-2013)

Amount (Ton)



Imports

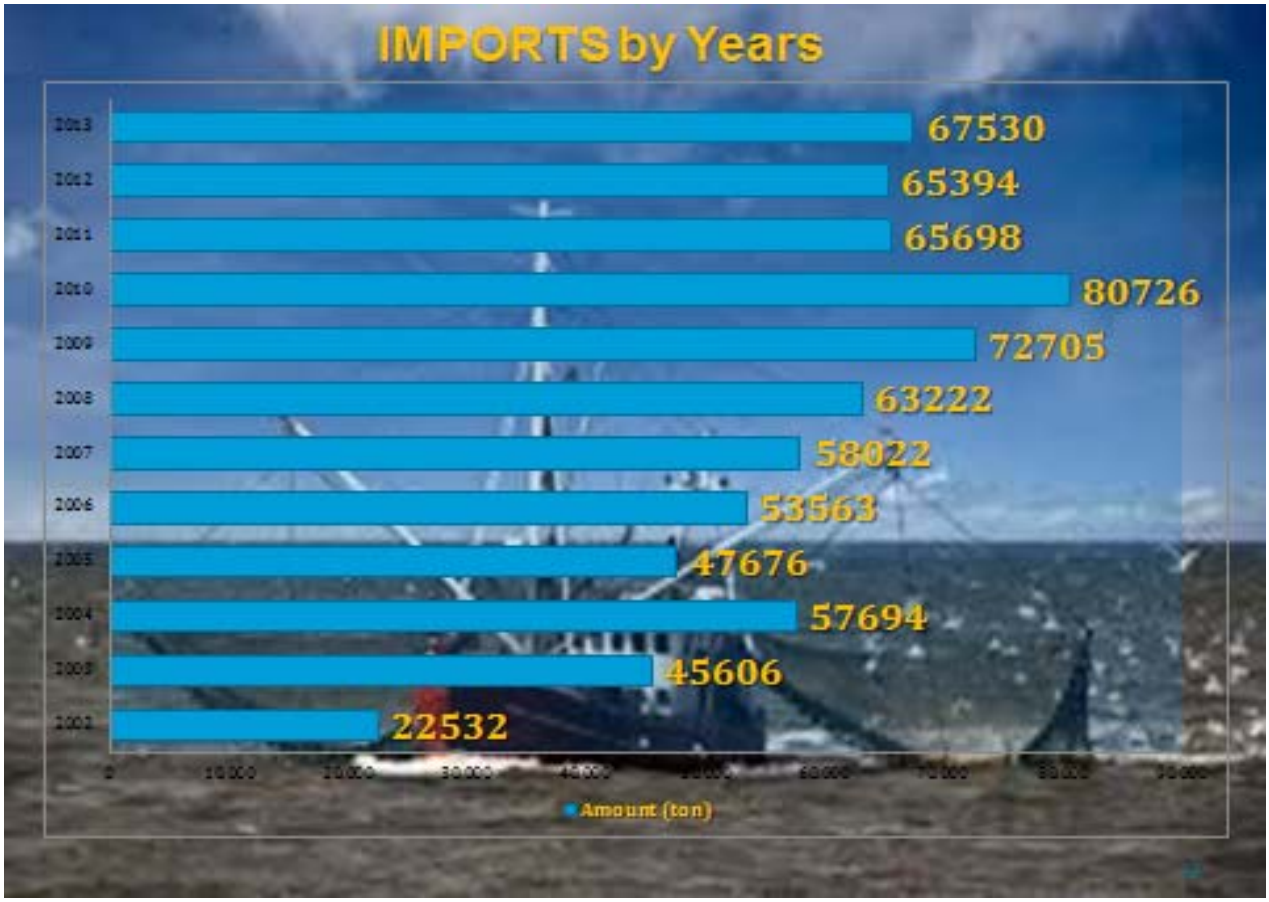
There is an increase in sea food imports. 90 % of sea food imports consists of frozen fish. An important share in import is from The Danube where Tuna fish comes. Import of this fish is made from the European Union countries (especially Holland, UK, and Norway), also from some of the African countries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

22,532 in 2002 (tons), 65,384 in 2012 the exports (tons), reaching the last eleven years, according to the amount of exports increased nearly 100 % has been achieved.

As regards 2013, in our country's imports of fish products Norway has the biggest share, being followed by France, India, USA, Morocco, Georgia and Greece

GRAPH 64: Imports of Water Products 2002-2013

(Amount (Tones)



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 19 faculties of maritime studies (including one in The Northern Cyprus Turkish Republic) which provides education at Bachelor's level (four years), 9 Anatolian High Schools and 62 Anatolian Technical High Schools.

FACULTIES OF MARITIME STUDIES (21.08.2015)

No	Universities	Faculties
1	ADANA BİLİM VE TEKNOLOJİ ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
2	BALIKESİR ÜNİVERSİTESİ	BANDIRMA DENİZCİLİK FAKÜLTESİ
3	BURSA TEKNİK ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
4	ÇANAKKALE ONSEKİZ MART ÜNİVERSİTESİ	DENİZ BİLİMLERİ VE TEKNOLOJİSİ FAKÜLTESİ
5	DOKUZ EYLÜL ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
6	İSTANBUL TEKNİK ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
7	İZMİR KÂTİP ÇELEBİ ÜNİVERSİTESİ	GEMİ İNŞAATI VE DENİZCİLİK FAKÜLTESİ
8	KARADENİZ TEKNİK ÜNİVERSİTESİ	SÜRMENE DENİZ BİLİMLERİ FAKÜLTESİ
9	MERSİN ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
10	MUSTAFA KEMAL ÜNİVERSİTESİ	BARBAROS HAYRETTİN DENİZCİLİK FAKÜLTESİ

11	MUSTAFA KEMAL ÜNİVERSİTESİ	DENİZ BİLİMLERİ VE TEKNOLOJİSİ FAKÜLTESİ
12	ONDOKUZ MAYIS ÜNİVERSİTESİ	GEMİ İNŞAATI VE DENİZ BİLİMLERİ FAKÜLTESİ
13	ORDU ÜNİVERSİTESİ	FATSA DENİZ BİLİMLERİ FAKÜLTESİ
14	PİRİ REİS ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
15	YILDIZ TEKNİK ÜNİVERSİTESİ	GEMİ İNŞAATI VE DENİZCİLİK FAKÜLTESİ
16	YÜZÜNCÜ YIL ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
17	BÜLENT ECEVİT ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
18	İSTANBUL ÜNİVERSİTESİ	DENİZ BİLİMLERİ VE İŞLETMECİLİĞİ ENSTİTÜSÜ
19	DOKUZ EYLÜL ÜNİVERSİTESİ	DENİZ BİLİMLERİ VE TEKNOLOJİSİ ENSTİTÜSÜ

Anatolian Maritime High Schools (21.08.2015)

No	Universities	Faculties
1	DOKUZ EYLÜL ÜNİVERSİTESİ	SEFERİHİSAR FEVZİYE HEPKON SOSYAL BİLİMLER MESLEK YÜKSEKOKULU – MARİNA İŞLETME
2	YAŞAR ÜNİVERSİTESİ	MESLEK YÜKSEKOKULU – DENİZ VE LİMAN İŞLETMECİLİĞİ / MARİNA İŞLETMECİLİĞİ
3	ÇANAKKALE ONSEKİZ MART ÜNİVERSİTESİ	DENİZ TEKNOLOJİLERİ MESLEK YÜKSEKOKULU
4	EGE ÜNİVERSİTESİ	URLA DENİZCİLİK MESLEK YÜKSEKOKULU
5	MERSİN ÜNİVERSİTESİ	DENİZ VE TİCARET MESLEK YÜKSEKOKULU
6	MERSİN ÜNİVERSİTESİ	DENİZCİLİK MESLEK YÜKSEKOKULU
7	MUĞLA SITKI KOÇMAN ÜNİVERSİTESİ	BODRUM DENİZCİLİK MESLEK YÜKSEKOKULU
8	MUSTAFA KEMAL ÜNİVERSİTESİ	DENİZCİLİK MESLEK YÜKSEKOKULU
9	PİRİ REİS ÜNİVERSİTESİ	DENİZCİLİK MESLEK YÜKSEKOKULU
10	BAHÇEŞEHİR ÜNİVERSİTESİ	MESLEK YÜKSEKOKULU
11	BARTIN ÜNİVERSİTESİ	BARTIN MESLEK YÜKSEKOKULU
12	GALATASARAY ÜNİVERSİTESİ	MESLEK YÜKSEKOKULU
13	GİRESUN ÜNİVERSİTESİ	TEKNİK BİLİMLER MESLEK YÜKSEKOKULU
14	GİRNE ÜNİVERSİTESİ	MESLEK YÜKSEK OLKULU
15	KOCAELİ ÜNİVERSİTESİ	KARAMÜRSEL MESLEK YÜKSEKOKULU
16	ORDU ÜNİVERSİTESİ	FATSA MESLEK YÜKSEKOKULU
17	RECEP TAYYİP ERDOĞAN ÜNİVERSİTESİ TURGUT KIRAN DENİZCİLİK YÜKSEKOKULU	DENİZCİLİK YÜKSEKOKULU

Anatolian Maritime Technical High Schools (21.08.2014)

No	City	Town	Name of Institute
1	ANTALYA	KONYAALTI	FETTAH TAMİNCE MESLEKİ VE TEKNİK ANADOLU LİSESİ
2	ANTALYA	MANAVGAT	MANAVGAT TİCARET VE SANAYİ ODASI MESLEKİ VE TEKNİK ANADOLU LİSESİ
3	ARTVİN	HOPA	KEMALPAŞA ÇOK PROGRAMLI ANADOLU LİSESİ
4	AYDIN	DİDİM	DİDİM MESLEKİ VE TEKNİK ANADOLU LİSESİ
5	AYDIN	KUŞADASI	ADVİYE-ERTUĞRUL ACUN MESLEKİ VE TEKNİK ANADOLU LİSESİ
6	BALIKESİR	AYVALIK	PAKMAYA KENAN KAPTAN MESLEKİ VE TEKNİK ANADOLU LİSESİ
7	BALIKESİR	ERDEK	KARŞIYAKA ÇOK PROGRAMLI ANADOLU LİSESİ
8	ÇANAKKALE	GELİBOLU	ARMATÖR YAKUP AKSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ
9	ÇANAKKALE	MERKEZ	ÇANAKKALE MESLEKİ VE TEKNİK ANADOLU LİSESİ
10	GİRESUN	BULANCAK	BULANCAK KAPTAN AHMET FATOĞLU MESLEKİ VE TEKNİK ANADOLU LİSESİ
11	GİRESUN	ESPİYE	ESPİYE Ş. CENGİZ SARIBAŞ MESLEKİ VE TEKNİK ANADOLU LİSESİ
12	GİRESUN	TİREBOLU	TİREBOLU PİRİ REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
13	HATAY	İSKENDERUN	SEFA ATAKAŞ MESLEKİ VE TEKNİK ANADOLU LİSESİ
14	ISPARTA	EĞİRDİR	EĞİRDİR MESLEKİ VE TEKNİK ANADOLU LİSESİ
15	İSTANBUL	ADALAR	HÜSEYİN RAHMİ GÜRPINAR ÇOK PROGRAMLI ANADOLU LİSESİ
16	İSTANBUL	BEŞİKTAŞ	ZİYA KALKAVAN MESLEKİ VE TEKNİK ANADOLU LİSESİ
17	İSTANBUL	BEYKOZ	BEYKOZ BARBAROS HAYRETTİN PAŞA MESLEKİ VE TEKNİK ANADOLU LİSESİ
18	İSTANBUL	PENDİK	PENDİK BARBAROS HAYRETTİN PAŞA MESLEKİ VE TEKNİK ANADOLU LİSESİ
19	İSTANBUL	TUZLA	PİRİ REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
20	İSTANBUL	ÜSKÜDAR	HACI RAHİME ULUSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ
21	İZMİR	ÇEŞME	ÇEŞME ULUSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ
22	İZMİR	GÜZELBAHÇE	GÜZELBAHÇE İMKB MESLEKİ VE TEKNİK ANADOLU LİSESİ
23	İZMİR	KARABURUN	KARABURUN MORDOĞAN FATMA EMİN KARAAĞAÇ ÇOK PROGRAMLI ANADOLU LİSESİ
24	İZMİR	KONAK	KONAK NEVVAR SALİH İŞGÖREN EĞİTİM KAMPÜSÜ - 4 MESLEKİ VE TEKNİK ANADOLU LİSESİ
25	İZMİR	KONAK	KONAK ÇINARLI MESLEKİ VE TEKNİK ANADOLU LİSESİ
26	İZMİR	KONAK	ŞEHİT İDARİ ATAŞE ÇAĞLAR YÜCEL MESLEKİ VE TEKNİK ANADOLU LİSESİ
27	KASTAMONU	İNEBOLU	PİRİ REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
28	KOCAELİ	GÖLCÜK	GÖLCÜK MESLEKİ VE TEKNİK ANADOLU LİSESİ

29	KOCAELİ	KÖRFEZ	HEREKE NUH ÇİMENTO MESLEKİ VE TEKNİK ANADOLU LİSESİ
30	MERSİN	AKDENİZ	DENİZ TİCARET ODASI MESLEKİ VE TEKNİK ANADOLU LİSESİ
31	MUĞLA	BODRUM	BODRUM MESLEKİ VE TEKNİK ANADOLU LİSESİ
32	MUĞLA	BODRUM	BODRUM TURGUT REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
33	MUĞLA	KÖYCEĞİZ	KÖYCEĞİZ MESLEKİ VE TEKNİK ANADOLU LİSESİ
34	MUĞLA	MARMARİS	BOZBURUN DENİZ TİCARET ODASI ÇOK PROGRAMLI ANADOLU LİSESİ
35	MUĞLA	MARMARİS	75. YIL MESLEKİ VE TEKNİK ANADOLU LİSESİ
36	ORDU	FATSA	ATATÜRK MESLEKİ VE TEKNİK ANADOLU LİSESİ
37	RİZE	ARDEŞEN	IŞIKLI MESLEKİ VE TEKNİK ANADOLU LİSESİ
38	RİZE	ÇAYELİ	ÇAYELİ AHMET HAMDİ İSAKOĞLU MESLEKİ VE TEKNİK ANADOLU LİSESİ
39	RİZE	MERKEZ	HASAN KEMAL YARDIMCI MESLEKİ Ve TEKNİK ANADOLU LİSESİ
40	SAMSUN	TEKKEKÖY	NEDİME SERAP ULUSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ
41	SİNOP	MERKEZ	SİNOP MESLEKİ VE TEKNİK ANADOLU LİSESİ
42	TEKİRDAĞ	SÜLEYMANPAŞA	KUMBAĞ MESLEKİ VE TEKNİK ANADOLU LİSESİ
43	TRABZON	ÇARŞIBAŞI	ÇARŞIBAŞI MESLEKİ VE TEKNİK EĞİTİM MERKEZİ
44	TRABZON	OF	OF HACI MEHMET BAHATTİN ULUSOY MESLEKİ VE TEKNİK ANADOLU LİSESİ
45	TRABZON	ORTAHİSAR	TRABZON MESLEKİ VE TEKNİK ANADOLU LİSESİ
46	TRABZON	SÜRMENE	SÜRMENE TÜRK TELEKOM MESLEKİ VE TEKNİK ANADOLU LİSESİ
47	VAN	TUŞBA	VAN PİRİ REİS MESLEKİ VE TEKNİK ANADOLU LİSESİ
48	YALOVA	ALTINOVA	YALOVA ALTINOVA TERSANE GİRİŞİMCİLERİ A.Ş. MESLEKİ VE TEKNİK ANADOLU LİSESİ
49	ZONGULDAK	EREĞLİ	HATİCE ERDEM MESLEKİ VE TEKNİK ANADOLU LİSESİ

PİRİ REİS UNIVERSITY

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

MARITIME SECTOR REPORT 2014 has been prepared by the Turkish Chamber of Shipping in accordance with the related laws. We kindly request you to present your suggestions to our Chamber, concerning with the subjects to be reviewed in more details in the Reports of the years to come.

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Turkish Chamber of Shipping

Publication No :
ISBN :

İstanbul & Marmara, Agean, Mediterranean, Blacksea Regions

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