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Chamber of  
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A photograph of two tugboats on the water under a cloudy sky. The foreground tugboat is orange and white with a prominent black fender system. The background tugboat is blue and white. The sky is filled with large, white, fluffy clouds.

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*Included among the photographers whose photographs were purchased by DTO at 2010<sup>th</sup> Photography Competition.*



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## TURKISH SHIPBUILDING INDUSTRY HAS BECOME A BRAND IN EUROPE



**TAMER KIRAN**

*CHAIRMAN OF THE BOARD OF TURKISH CHAMBER OF SHIPPING*

As Turkish Chamber of Shipping, we are very happy to participate in POSIDONIA 2024 International Shipping Fair, one of the most important international meeting points of the maritime industry, and to come together with our friends.

The most important development for us in the 2-year period following our last meeting in 2022 was undoubtedly the centenary of the founding of the Republic of Türkiye last year. The date of founding of the Republic in 1923 is also very important for our commercial maritime history.

Until the proclamation of the Republic, there was no national maritime trade activity in our country, our territorial waters were left to the use of foreigners, and the Turks remained almost strangers in their own waters. Our national trade fleet, which entered the Republic period with 88 ships of 34 thousand 902 net tons, most of which were worn out, has shown great development over the years, reaching approximately 1962 ships and 47.9 million DWT as of today, having risen to the 12th place among the countries with the largest fleet in the world.

The total amount of cargo handled in our ports in 2023 increased to 521 million tons and Türkiye has now become a leading country in Europe in cargo handling with its effective port infrastructure. Today, Türkiye has become a country that has achieved great success in ship building, repair and maintenance. As of 2023, the number of our shipyards has increased to 85 and our annual production capacity has climbed to 4.79 million DWT. The Turkish shipbuilding industry has become a brand in Europe, particularly specializing in the construction of fishing vessels and tugboats that require high technology.

The EU Green Deal has increased the orders for electric and hybrid ships coming to our shipyards, and our shipyards have also achieved significant success in special purpose ship construction. Our shipyards, which carry out the ship building projects such as the world's first LNG powered tugboat, the first floating energy ship (powership), the first remote controlled ship, electric tugboat, electric-hybrid passenger ships capable of cruising in the poles, electric-hybrid ferries, fishing vessels, has

also made a significant increase in the construction of tugboats with green energy propulsion systems ordered from Northern European countries surpassing the leader China in tugboat exports and rising to first place. Türkiye has shown a steady rise, especially in the building of super yachts of 24 meters and above since 2007. According to January 2021 data, which is evaluated on a length basis, Türkiye ranked third in the world with 3,497 m, while according to 2023 data, which started to be evaluated on a tonnage basis, Türkiye ranked 4th with 73,011 GT.

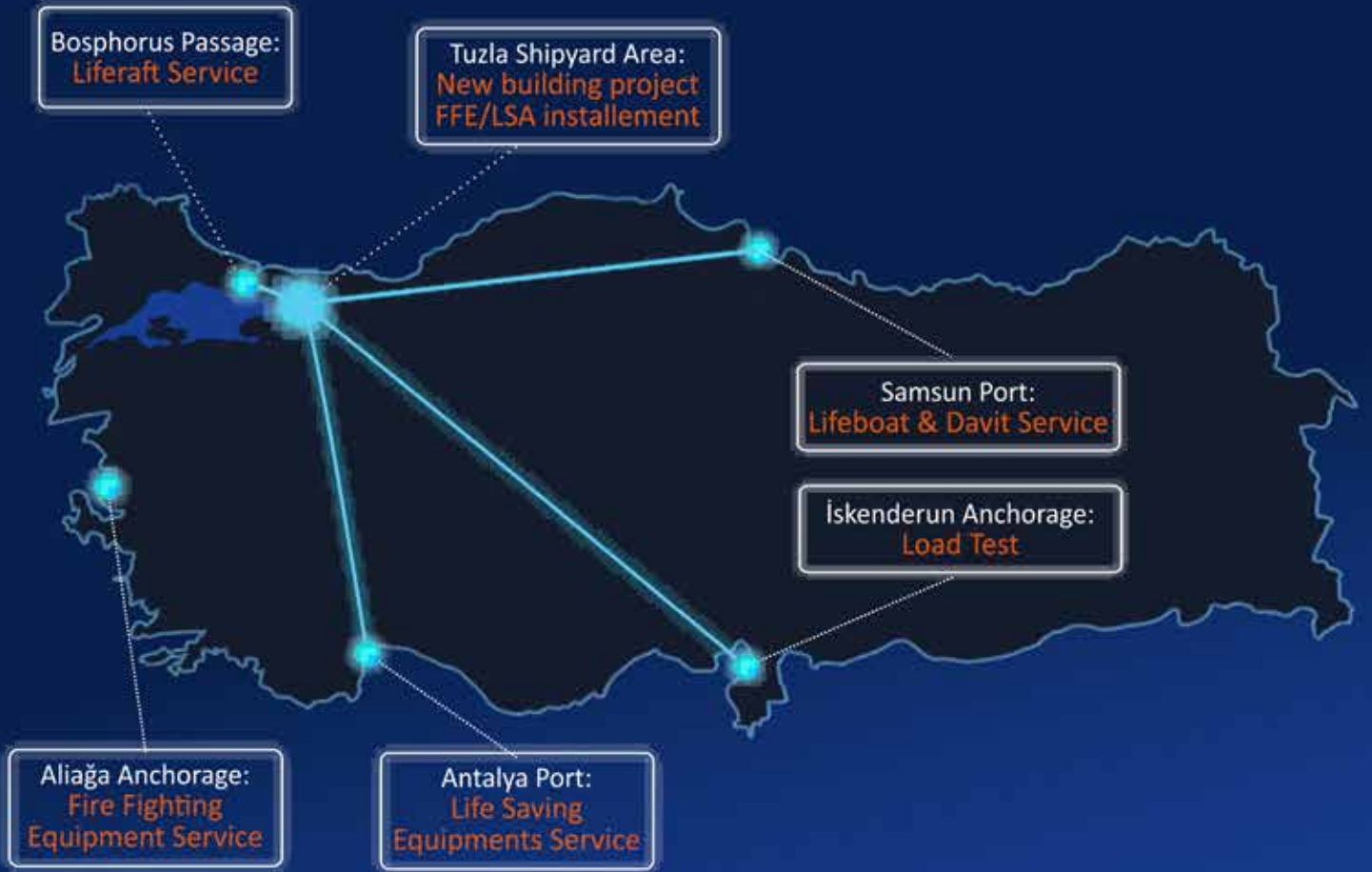
We are proud of the point the Turkish maritime industry has reached, but we act with the awareness that there is a long road ahead of us, and as a country, we continue our work with the aim of being among the 10 leading countries in world maritime. On the other hand, due to climate change, which has become a serious problem worldwide, we rigorously monitor the green transformation process in the maritime sector in order to comply with the obligations, rules, standards and regulations brought by the International Maritime Organization (IMO) and the European Union, and are working to contribute to the adaptation process of our sector.

Furthermore, this year, on the occasion of the Posidonia Exhibition, we will visit our counterparts in Greece, the Hellenic Chamber of Shipping, the Hellenic Shortsea Shipowners Association and the International Maritime Union. Also, Turkish Maritime Sector Cocktail will be organized in order to promote and increase the representation of the Turkish maritime sector in the international arena and this reception is expected to bring together all stakeholders and companies. I believe that this visit and our activities will be instrumental in introducing our country's potential in the international maritime industry and developing cooperation opportunities. With these feelings and thoughts, I hope that the 2024 Posidonia Exhibition will contribute to our maritime industry and be successful for the participating Turkish companies.



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# Istanbul and Marmara, the Aegean, the Mediterranean and the Black Sea Regions (IMEAK) TURKISH CHAMBER OF SHIPPING



**TAMER KIRAN - Chairman of the Board**

Istanbul and Marmara, the Aegean, the Mediterranean and the Black Sea Regions (IMEAK) Chamber of Shipping, briefly called as the Turkish Chamber of Shipping (TCS), is the umbrella organization representing the Turkish maritime sector, with its headquarters in Istanbul and main branch offices in Izmir, Bodrum, Marmaris, Antalya, İskenderun, Fethiye, Karadeniz Ereğlisi (West Black Sea Region) Kocaeli and Aliğa. It has a Liaison Office in Ankara and also 15 representative offices along the coastal towns and cities of Turkey.

Turkish Chamber of Shipping was first founded as Istanbul Chamber of Shipping in 1982 and afterwards its area of activities has been extended gradually to cover the regions of the Sea of Marmara, the coasts of the Aegean Sea, the Mediterranean and the Black Sea together with the inland waters of Turkey.

The Chairman of the Board of Directors of the Turkish Chamber of Shipping is Mr. Tamer Kiran.

## OBJECTIVES

The most important objectives of the Turkish Chamber of Shipping are protecting interests of its members, meeting the common needs of seafarers, ensuring the development of maritime profession, facilitating professional activities, setting the shared rules, advising to the relevant authorities on maritime issues, while preserving its discipline, ethics and solidarity.

## ACTIVITIES

The Chamber's main activities include determining the rules and practices related to shipping, conducting research, collecting information about shipping, ensuring development of shipping in accordance with the national transportation policy, informing foreign organizations about the capacities and tariffs of Turkish ports, becoming a member of international maritime organizations, monitoring their activities, and performing other tasks specified in the laws.

## MEMBERS

In accordance with the Chambers and Commodity Exchanges of Türkiye (TOBB) Union Law 5174, all the companies dealing with maritime activities should become a member of Turkish Chamber of Shipping (TCS). Our members are assembled in 48 Professional Committees according to their occupations and professions.

Turkish Chamber of Shipping represents the Turkish maritime sector and shipping industry and comprises all ship-owners, ship operators,



Chamber of Shipping



**BAŞARAN BAYRAK**  
President of the Assembly

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 as members.

The Turkish Chamber of Shipping is a member of the following bodies: The Union of Chambers and Commodity Exchanges of Türkiye (TOBB), International Chamber of Commerce–Turkey National Committee (ICC Türkiye), International Chamber of Shipping (ICS), International Chamber of Commerce–International Maritime Bureau (ICC-IMB), Federation of National Associations of Ship Brokers and Agents (FONASBA), European Community Association of Ship Brokers and Agents (ECASBA), Baltic and International Maritime Council (BIMCO), The Association of Mediterranean Cruise Ports (MedCruise), European Boating Association (EBA), International Bunker Industry Association

(IBIA), European Shortsea Network (ESN), and Turkish-German Chamber of Commerce and Industry (TD-IHK).

#### **MISSION**

To offer our members efficient, productive and affordable services for shipping activities which are compatible with global system with the purpose of developing Turkish Shipping Sector in a free competition environment, increasing international competitive power of Turkish Shipping Sector and contributing to the national economy through our ever-developing service concept.

#### **VISION**

Maritime Nation and Maritime Country.

#### **CORE VALUES**

Quality Service; Member & Employee Satisfaction; Meeting Stakeholders' Expectations; Reputation & Reliability; Impartiality & Transparency; Active Participation; Continuous Improvement; Principles of Collaboration, Tolerance and Respect; Social Responsibility; and Environmental Responsibility.



Executive Board of the Chamber of Shipping

# WE CAN SECURE THE FUTURE OF HUMANITY BY PROTECTING OUR SEAS



## DURMUŞ ÜNÜVAR

DEPUTY MINISTER OF TRANSPORT AND INFRASTRUCTURE

**You started your duty as deputy minister as someone who knows the maritime industry closely. If you evaluate the Turkish maritime industry in general, what would be your predictions?**

12.4 billion tons, or 86%, of the 14.3 billion tons of cargo in world shipping are transported by sea, and maritime transportation has a share of 87.5% in our country's total foreign trade with 366 million tons. Surrounded by four seas on three sides, having two straits connecting these seas and a coastline of approximately 11,000 kilometers, our

country handles 521 million tons of cargo and 12.6 million TEU containers in 217 ports. Our container ports in Tekirdağ, Ambarlı, Kocaeli and Mersin are among the top 100 ports in the world. Our shipbuilding industry, together with its side industry, is an important industrial branch that employs approximately 87,000 people and its maintenance & repair volume increased by 129% in the last 10 years, reaching 35 million DWT. With 23 ship recycling facilities, our country is the 4th in the world and the leader in Europe in terms of ship dismantling capacity. Our

*Our interview with Deputy Minister of Transport and Infrastructure Durmuş Ünüvar, who emphasized that the Turkish maritime industry can capture growth opportunities by opening up to new markets and offering diversified services, sheds light on both the present and the future while giving a comprehensive outlook of the industry. According to Ünüvar, although the course of global trade, political developments and changes in international relations affect shipping, it is possible to turn this into an opportunity.*

country ranks 7th in the world in terms of ship orders with 85 active shipyards and 11th in ship tonnage, and has reached the highest figures of the last decade with ship and yacht exports of 1.94 billion dollars in 2023.

In addition, new generation ships such as the world's largest fully electric ferry, the world's first fully electric tug, the world's largest battery capacity passenger ferry, the world's first LNG-fueled tug, the world's largest live fish transport ship, the world's first twin-hull electric





offshore wind turbine support vessel with dynamic positioning 2 system, the world's largest longliner paraketa and the Danish seiner fishing ship were built in our country's shipyards and exported to countries such as Norway, Denmark and Canada. Our country ranked first in the world in tugboat exports with 313 million USD in 2023. Our shipping fleet of 2028 ships, which reached 48.9 million deadweight tons with 1,000 GT and above, has a financial value of 24 billion dollars, and ranks 12th in the world in terms of deadweight capacity. Turkish Flag is among the highest performing Flag States within the Paris Memorandum of Understanding. Türkiye is a maritime country with more than 1 million amateur sailors and 140,000 seafarers. It is on the white list within the scope of the International Convention on Standards of Training, Certification and Watchkeeping for Seafarers; and has signed the Recognition of Seafarer Competence Certificates Agreement with 37 countries.

As for our predictions regarding our maritime industry, of course, the use of technologies such as automation, data analytics and artificial intelligence will increase in the maritime industry.

This will increase operational efficiency and reduce costs. The importance of environmentally friendly practices and sustainability principles will gradually increase. Low-carbon emission ships and measures to reduce sea pollution need to be adopted. Türkiye's sea tourism potential is also quite high. We will continue to work to improve infrastructure and service quality to continue growth in this area.

The course of global trade, political developments and changes in international relations especially affect shipping. We must turn this into an opportunity. The Turkish maritime industry can seize growth opportunities by opening up to new markets and offering diversified services. Collaborations and investments, especially in markets such as the Middle East, Africa and Asia, may increase. Our Ministry already has very important efforts on this issue. We will detail these in the following questions.

**Could you give us information about the projects you have carried out since the day you took office?**

We particularly participate in the meetings of the Joint Economic Board, Transportation Boards held with international organizations and countries such as the International Maritime Organization (IMO) and the International Association of Marine Aids to Navigation and Lighthouse Authorities (IALA), as well as the OECD, the Organization of Turkic States (OTS), the Three Seas Initiative. In these meetings, we are taking important initiatives in the fields of our shipping, combined transportation and logistics, for example; Development Road and Middle Corridor. Taking into account the developments and regional sensitivities in the Eastern Mediterranean, we are increasing our dominance in the Eastern Mediterranean by expanding the area of monitoring and management of ship traffic with the Turkish Republic of Northern Cyprus. Our negotiations with World Bank officials regarding the development and financing of shipping and combined transportation models continue. For the first time, 66 million TL support was provided to the maritime industry by the UDHAM (Transportation Maritime Communication Center), the R&D unit of our Ministry, for the development of domestic and national maritime-related technologies. The maritime industry received the highest share of 41% from the total support provided by our Ministry. In addition, our country was recently elected for the 13th time in a row by receiving the highest vote in our country's history in the International Maritime Organization (IMO) Council Membership elections, and Türk Loydu became a member of the International Association of Classification Societies (IACS).

**As a person who knows the Turkish Maritime industry very well, you are the Deputy Minister and you are trying to find solutions to the problems together with our umbrella organization, Chamber of Shipping. What are the most important topics on your agenda?**

Considering the momentum that the maritime industry will gain in the coming

period, it is becoming an area where technological developments are rapidly adopted. In this context, we will give priority to data and technology projects in the maritime field such as autonomous ships, smart ports, and remote monitoring systems. Our country has a strategic importance in the logistics sector due to its geographical location. Our ports, transport routes and logistics centers play a key role in international transport. In this context, increasing Türkiye's logistics and port capacity, eliminating infrastructure deficiencies, and improving railway and road connections are one of the most important issues on our agenda.

On the other hand, shipping security in international waters is of great importance due to its impact on trade. We will continue to participate in international projects and collaborations on issues such as anti-piracy operations, the fight against smuggling at sea and the security of shipping infrastructure. Trained human resources are also very important in the maritime industry. We will attach importance to projects aimed at improving maritime education standards and maritime human resources.

Let me try to outline some of our other major works.

1- We will give priority to projects that will meet the need for boat moorings and slipways, especially in the Aegean and Mediterranean regions. In this context, we will finalize and implement the study on mooring systems carried out together with the Ministry of Environment, Urbanization and Climate Change.

2- Putting the Izmir Çaltıldere Boat Manufacturing and Boatyard project, which continues at full speed, into service, and the implementation of the Fethiye Karaot Yacht Manufacturing and Boatyard project,

3- Fethiye Cruise Port Project, which will make a great contribution to regional tourism,

4- Inclusion of maritime in the Emission Trading System (ETS) to be established in Türkiye.

5- The approval and entry into force of the MLC Convention,

6- Updating the Maritime Labor Law according to today's conditions, clearly determining the rights of seafarers and owners, ensuring peace between employers and employees, and increasing the employment of Turkish seafarers.

7- Renewal of our shipping fleet and implementation of relevant incentives, loans and regulations,

8- Further growth of our shipyards in new shipbuilding, especially increasing our military shipbuilding capacity in the defense industry,

9- Allocation of new integrated areas for yacht and boat manufacturers,

10- Strengthening our Ministry's seabed dredging fleet,

11- Increasing our power to prevent and intervene in environmental pollution by saving life and property at sea by expanding the duty area of our General Directorate of Coastal Safety, which mainly serves in the Turkish Straits, throughout Türkiye,

12- Finally, making the necessary changes in the law for our Ministry's UDHAM (Transportation Maritime Communication Center) Presidency to provide incentives for maritime projects. At this point, we also submitted the amendment to the law to the Turkish Grand National Assembly.

In addition, we also have some studies within the scope of the 12th Development Plan:

1- Continuing to support green port practices by encouraging the use of low-emission/non-emission machinery and equipment to minimize environmental impacts by increasing energy efficiency in port operations,

2- Encouraging R&D studies for the dissemination of environmentally friendly, new generation marine vehicles,

3- Improving the coastal facilities in our country and improving the Turkish shipping fleet to ensure that Türkiye becomes a regional and continental transfer hub in shipping,

4- Completing preparations for the establishment of a new shipyard for



ship maintenance and repair in the Eastern Mediterranean, with a priority on strategically important drilling ships and military ships,

5- Building a main port in the Eastern Mediterranean region that will be the gateway to the Middle East and Central Asian countries, focused on transit cargo, and will contribute to the development of the region and increasing exports,

6- The back areas of coastal facilities will be developed, ports will be built in accordance with holistic coastal planning to maximize the benefits of economies of scale, and connections with international intermodal transport corridors will be strengthened,

7- Implementing appropriate financing models for the development of the Turkish shipping fleet by increasing the number of low-tonnage ships, the effective elements of short-distance maritime transportation.

### **6 months of the year are almost gone. What would be the momentum of the maritime industry in the coming period?**

We actually answered this question while listing our predictions in the first question you asked. As I mentioned before, the momentum of the maritime industry in the coming period may change depending on several main factors such as Technological Progress, Sustainability and Environmentally Friendly Practices, Global Trade and Political Relations, New Markets and Business Opportunities, and Investment and Infrastructure Development. In general, we expect the maritime industry to continue to

grow in the coming period depending on technological, environmental and economic factors. In this process, sustainability, innovation and international collaborations will be important to increase the competitiveness of the industry.

### **The rules set by IMO and new fuel types of the future are being discussed. Do you think we, as Türkiye, are prepared for this?**

Undoubtedly, the rules introduced by IMO and new fuel types cause significant changes in the maritime industry. In particular, IMO's 2020 Sulfur Emission Control (IMO 2020) rules have limited the amount of sulfur in fuels used on ships. This requires the use of fuels with low sulfur content or the adoption of alternative fuel technologies.

As Türkiye, we can take a few steps to be prepared in this regard:

If we list them:

**1. Evaluation of Fuel Needs:** By evaluating Türkiye's fuel needs in the maritime industry and the current fuel supply chain, the infrastructure will need to be strengthened for the supply and distribution of fuels with low sulfur content.

**2. Research on Alternative Fuel Technologies:** Low sulfur alternative fuel technologies such as LNG (liquefied natural gas) can be evaluated in Türkiye. Development of LNG terminal and storage infrastructure can encourage the use of this fuel. However, problems in the storage, supply and shipment of fuels such as LNG are discussed all over the world.

**3. Infrastructure Development:** It is important to prepare the port infrastructure, the construction of the necessary facilities for the supply of alternative fuels, and the preparation of the necessary infrastructure for ships to receive this fuel.

**4. Updating the Regulatory and Legal Framework:** The process of making the necessary legal regulations and establishing inspection mechanisms to harmonize Türkiye's national regulations with the rules set by IMO will come before all relevant institutions.

## 5. Awareness Raising and Training:

Stakeholders in the maritime industry should be made aware of the new rules and fuel types. Ship personnel and port workers should be informed about this issue by organizing training programs.

**6. International Cooperation:** Türkiye can access the most up-to-date information and best practices by collaborating with IMO and other relevant institutions at the international level. This could help Türkiye bring its maritime industry into line with international standards.

By taking these measures, Türkiye will be prepared for the rules set by IMO and new fuel types, and also will develop its maritime industry in a sustainable manner. This will both contribute to the creation of a more environmentally sustainable maritime industry and increase international competitiveness. In this context, international developments are also closely followed.

## The EU ETS System also entered into force. Is Türkiye working on it?

Look, the European Union's Emissions Trading System (ETS) is an important mechanism at the heart of the EU's efforts to reduce greenhouse gas emissions. This system is used as an economic tool to promote the reduction of greenhouse gas emissions. Within the scope of the European Union's Green Deal, the Emission Trading System for maritime entered into force on January 01, 2024, and the Fuel EU Maritime System will enter into effect on January 01, 2025. These practices will of course bring additional financial burden to our ships. Since European maritime organizations provide financial resources from these systems, it is considered that financial support should be given to the green transformation of the Turkish Maritime industry in order to maintain its international competitiveness. At this point, as Türkiye, we are carrying out various studies on the EU ETS System.

**1. Compliance Studies:** Türkiye continues its harmonization studies regarding the EU ETS System to comply with the EU's environmental and energy policies. In parallel with the EU's greenhouse gas

emissions reduction targets, Türkiye also needs to strengthen its emission reduction policies and mechanisms.

## 2. Air Quality and Environmental

**Policies:** The EU ETS System covers greenhouse gas emissions as well as air quality and environmental protection policies. Strengthening Türkiye's environmental policies and improving air quality is one of the important steps towards increasing compliance with the EU ETS System.

## 3. Green Economy and Sustainable

**Development:** The EU ETS System supports achieving green economy and sustainable development goals. Türkiye's efforts in these areas can help it achieve balance between economic growth and environmental sustainability.

**4. Climate Change Policies:** The EU ETS System is considered an important tool in the fight against climate change. It is important for Türkiye to strengthen its climate change policies and increase its efforts to reduce greenhouse gas emissions in order to ensure compliance with the EU ETS System.

Our country's compliance with EU standards in environmental and energy policies and its participation in international environmental agreements are followed up seriously. In this context, we see that the EU ETS System is taken as a reference point for Türkiye and Türkiye is taking steps to develop its own emission trading mechanisms. It is necessary to provide financial support for R&D, innovation and modernization studies for the green transformation of ships, shipyards and ports from the revenues to be obtained by including maritime in the Emission Trading System (ETS) to be established in Türkiye. We recently submitted the bill prepared in this context to the Turkish Grand National Assembly.

## Finally, what message would you like to give to the industry?

Seas have been a unifying force for humanity throughout history. Maritime is an important industry that mobilizes this power, ensures economic development and forms the backbone of global trade. Today, the maritime industry is facing

significant transformations. Advances in technology, environmental responsibilities and changing dynamics of global trade cause the industry to face new challenges. But these challenges also present great opportunities. Based on the principles of sustainability, innovation and collaboration, the maritime industry can become stronger and more resilient in the future. Technological developments such as switching to clean energy sources, digitalization and unmanned marine vehicles can make the industry more efficient, environmentally friendly and competitive.

Türkiye, a strong and stable country located at the intersection of North-South and East-West logistics corridors, where the stability of shipping activities in the Black Sea, Eastern Mediterranean, Suez-Red Sea is negatively affected, it is essential to contribute to careful planning of international shipping activities throughout the geography, especially in our Blue Homeland, and to develop strategies and policies in order to be prepared for possible developments by following up these issues seriously. The Development Road, which will be connected to our country by rail and road from Faw Port in the Persian Gulf of Iraq, is planned to include the cargo coming from the Middle Corridor and the Baku-Tbilisi-Kars and Zangezur Corridors and their sea-port connections. It is also important for our industry to follow these developments and plan its domestic and international investments accordingly.

Being a strong maritime country depends on having a strong, dynamic maritime industry and a strong navy. By working together, we can support the maritime industry to contribute to the sustainable and inclusive growth of global trade, protect our seas and secure the future of humanity. Let's not forget that the seas are a heritage that brings us together and shapes our future. As the Ministry, we will continue to work in determination, together with our maritime industry, under the leadership of our minister, Mr. Abdulkadir Uraloğlu, to preserve this heritage and pass it on to future generations.

## ALIAĞA

# THE GROWTH OF THE ALIAĞA REGION WILL MAINTAIN ITS CONTINUITY



**ADEM ŞİMŞEK**

*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING ALIAĞA BRANCH*

As the Aliğa Branch of the Chamber of Shipping, the umbrella organization of the maritime industry in Türkiye, I would like to convey our greetings and wishes of success to all companies and visitors participating in the Posidonia 2024 Exhibition.

Aliğa continued its steady rise and ended up ranking first in Türkiye in 2023. The increase in handling in our ports of Aliğa continued as in the last 5 years, and as a result, we overtook the Kocaeli Region and ranked first in Türkiye. According to the 2023 data of our Ministry of Transport and Infrastructure, our port enterprises located in the Aliğa Port Authority region processed 81,355,615 net tons,

which correspond to approximately 15.61% of the cargo handled in Türkiye. 32,169,319 of this tonnage was recorded as loading and 49,186,296 as unloading. Achieving these figures despite the fact that the number of port operations under our Aliğa Port Authority is less than half of the Kocaeli Region is very valuable for us. I would like to thank all our member businesses and everyone who contributed to reaching these great figures. The growth of the Aliğa region will maintain its continuity with our port enterprises entering 2024 with expanded capacities and the enterprises that will subsequently launch expansion projects. We will continue to do our best to pave the way for all stakeholders of the maritime industry who are planning

to invest in our region, who are currently doing business, and who will do so.

In 2023, the number of ships arriving at Aliğa Port Authority was 6329. It is 4.1% up from 2022. Of the total number of ships, 1629 ships are Turkish flagged and 4700 foreign flagged. As for the breakdown of the total cargo carried in Türkiye by cargo types, there were slight decreases in dry bulk, general cargo, liquid bulk and vehicle segments. However, the cumulative tonnage of cargo transported by containers increased by 2.47% compared to 2022, reaching 133,467,400 tons. This increase is directly reflected in our TEU figures, which have increased continuously in the last 5 years. The number of TEUs handled by our 3 container terminals reached 1,585,819 with an increase of 6.16%. With the impact of new investments and extra future container services, Aliğa will increase its numbers in the coming years and move towards the top of Türkiye's rankings.

Another port in our region, Dikili Port on the other hand received a small share in the cruise ship traffic, which we expect to recover from the effects of the pandemic and reach or exceed the ship numbers and tourist numbers reached between 2011 and 2015. In 2023, 25 cruise ships with 6530 passengers visited our Dikili port.

Customs data of our Ministry of Commerce has also been added to all the positive data announced by our Ministry of Transport and Infrastructures about our region. 21,829,758,000 dollars of exports and 14,270,420,000 dollars of imports were realized within the Aliğa Customs Directorate in 2023. Our Aliğa Customs Directorate has become the 2nd Customs Directorate with the



most exports on the basis of Customs directorates. The total import and export from Aliğa Customs Directorate and all our port operations accounts for approximately 8% of Türkiye.

I believe that the rising trend of the ports affiliated to our Aliğa DTO Branch is parallel to the fact that all the businesses in the region are under private sector management. Our private enterprises make our ports most competent and functional in terms of physical,

management style has enabled people and organizations receiving service from ports to work more profitably and efficiently. Customer satisfaction is the most important reason for the increase in load. The mobility of Socar Star refinery, one of our petrochemical facilities, and the handling at Tüpraş facilities were very effective in this success. Apart from this, the introduction of growth projects in our container and general cargo ports has helped us reach this position.



equipment and human resources for the service satisfaction of customer shipowners, importers, exporters and all other port stakeholders. This strategic

I believe that the positive effects of maritime on the commercial side will be felt intensely on the sea tourism side in Aliğa in 2024. We predict that the

Aliğa – Midilli line will be quite active in the summer months of this year. The tender for the construction of the port project required to serve this line was completed and the works started as of April. With the commissioning of this project, there will be dynamism in economic and social life in Aliğa. It is a project that will also create added value in terms of tourism. It will bring foreign currency to our country and also benefit our district and our country in terms of employment.

After Ayvalık Setur, the first private marina in our area of responsibility, the second private marina in Yeni Foça was opened with a mooring capacity of 330 yachts, 230 at sea and 100 on land, and built as a social life center. It will provide very high added value to our region in terms of both employment and tourism. We aim to make the Northern Aegean region a place of attraction for yacht operators and private yacht owners and we support all kinds of initiatives. Another new project will be added to our marinas very soon. The necessary permits for the new marina for approximately 200 yachts in Aliğa Bay will be obtained and the construction phase will begin. Foça, Ayvalık and Dikili, which are within our area of responsibility, will continue to become centers of attraction in tourism with their historical and natural beauties. Last year, Dikili hosted 25 cruise ships and ranked 7th in Türkiye. This year this number will increase even more. On the other hand, the ministry's marina survey project work continues for Dikili and Şakran.

We have been serving as a branch of the Chamber of Shipping in Aliğa since 2018. As the 2nd term chairman of the Aliğa Branch which is responsible for the region from Menemen to Ayvalık, I am proud to say that we personally took part in and supported all kinds of projects that would contribute to maritime and our country. I hope that Posidonia exhibition will bring prosperity and good luck to the entire maritime community.

## ANTALYA

## ANTALYA AIMS TO SET NEW RECORDS IN 2024!



AHMET ÇETİN

CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING ANTALYA BRANCH

Our city Antalya, which is a paradise on earth with its 640 km coastline and bays with unique views, has hosted many civilizations throughout its history and is equipped with artifacts belonging to these civilizations.

Our distinguished city is the tourism capital of our country with its rich cultural, natural and historical assets, sea, health, sports, plateau and winter tourism opportunities, and is now slowly recovering from the impacts of the pandemic and the subsequent Russia-Ukraine war on the tourism economy. After reaching the highest number of tourists last year, especially with the support of public institutions, Antalya now aims to exceed these figures for 2024. Data from the first two months of the year prove the accuracy of this expectation. According to the data of

the Provincial Directorate of Culture and Tourism, a total of 16,084,737 people visited our city last year, and this year 229,097 tourists visited our city in the first month of 2024. Last year, 220,010 people came in January, and this year there was a 4.13 percent increase in the number of visitors compared to last year.

The importance of Antalya, the golden star of tourism, is once again revealed in achieving the target of 60 million tourists and 60 billion dollars set by our Ministry of Tourism and Culture for 2024. As the management and members of IMEAK Chamber of Shipping Antalya Branch, we work hard towards our goals in order to contribute to the economy of both our country and our city. Here is a brief evaluation of what we did for the maritime industry and Antalya last year, which we closed with important records:

**Our Zero Waste Efforts Not Slowed Down**

As Chamber of Shipping (DTO), one of our most important goals is the cleaning of our seas, which is our living space. For this purpose, we have organized activities in accordance with our 'Zero Waste' certificate, which we received as a Branch. Under the leadership of Turmepa, and with the support of Antalya Governorship and Antalya Metropolitan Municipality, we put the 'Waste Reception Ship' into operation in the Adrasan Region to protect our seas in 2023. In the coming period, we will take steps to protect the entire ecosystem in the Mediterranean in cooperation with our public institutions and NGOs, with an awareness of climate changes.

**Important Steps Regarding Harbour of Refuge and Slipway**

One of the most important problems of our Antalya region, which has the longest coastline, is the slipway problem. We continue to work to solve this problem. We aim to receive feedback in a short time, especially regarding the construction of a new slipway in the Kumluca region and the Manavgat Shipyard and Slipway.

**Our Most Important Mission: Create a Maritime Culture**

As DTO, one of our most important missions is to contribute to the maritime culture in our region. The Side Underwater Museum established by our Branch for this purpose has become one of the most important diving centers of our region with thousands of tourists. However, the recent damage to the statues, especially due to unconscious anchoring and excessive fishing, required us to take new measures. For this reason, maintenance and repair works continue regularly every year to preserve the inventory in the museum.

We started the project "From the Taurus to the Mediterranean", to instill the love for maritime in our children, and let



7th and 8th grade students from our schools visited Setur Marina Antalya, QTerminals Antalya Port Management and Fettah Tamince Vocational and Technical Anatolian High School. Especially last year, during the May 19 The Commemoration of Atatürk, Youth and Sports Day and October 29 Republic Day celebrations, we celebrated the 100th anniversary of our Republic together with the people of Antalya with the Marine Procession we created with the contributions of our members under the coordination of Antalya Governorship.

manufacturing center, has turned into the most important yacht manufacturing center of Türkiye and the Eastern Mediterranean, especially with the investments made after the pandemic. There are 50 yacht manufacturing companies in Antalya Free Zone, where 88 companies are located, and 93 yachts with a total length of 1424 meters were delivered to their owners in 2023. Total sales value is 143 million dollars. 25 yachts came for yacht maintenance and repair in 2023, 10 of these yachts have been delivered. These were some of the



I have to state that we, as IMEAK Chamber of Shipping Antalya Branch, are ready to carry out very important events in Antalya in 2024, especially on our July 1 Maritime and Cabotage Day.

### **Our Goal: Be a world brand in yacht production**

Antalya Free Zone, which has become Türkiye's most important yacht and boat

contributions we, as IMEAK Chamber of Shipping Antalya Branch, tried to provide to Antalya maritime and tourism. And here is a list of highlights of 2024 season for our guests coming to Antalya:

### **Antalya, the Capital of Sea Tourism**

Our city continues to be Europe's water sports leader with approximately 300 water sports tracks. Due to its

geographical features, underwater riches and high sea water quality, we are the leader in water sports at all times of the year. Our water sports businesses, which make a significant contribution to the economy, especially due to the foreign tourists, have opened the new season as of the beginning of April and have great expectations for 2024.

### **Diving Opportunity at 222 Points for 12 Months**

Our 222 diving points on our coastline stretching from Gazipaşa to Kalkan host underwater enthusiasts. The diving season in Antalya lasts 12 months and a thousand dives are performed daily during the season. We expect diving tourism to peak as the sea water temperature rises starting from May.

### **Season Opens Early for Daily Boat Tours**

One of the best activities our guests can do in Antalya is daily boat tours. There are many daily boat tours from the marina area, especially Antalya and Kemer, as well as from surrounding holiday resorts. There are approximately 700 daily boats registered to our chamber. Our members started launching their boats as of the beginning of April and preparations for the season continue at full speed.

### **Antalya Bays for Alternative Holidays**

One of the tourism activities that have become popular recently are yacht tours and blue voyages. The best way to see the beautiful coasts of Antalya, which hosts the most beautiful bays in the world, is to follow it from the sea on a yacht or gulet. Yachts of all sizes are able to dock in our blue flag marinas.

### **Great Expectations in Cruise Lines**

Another branch of tourism that we expect Antalya to make a breakthrough this season is cruise tourism. Considering the contribution of cruise ships, known as floating hotels, to the economy of a city and country, Antalya must take its place. Last year a total of 44 cruise ships visited our ports and we expect this number to increase significantly this year.

## BODRUM

## HOME TO ONE OF THE SEVEN WONDERS OF THE ANCIENT WORLD



ORHAN DİNÇ

CHAIRMAN OF İMEAK TURKISH CHAMBER OF SHIPPING BODRUM BRANCH

Bodrum lies like a Mediterranean jewel in an area of outstanding beauty, with its whitewashed houses clustering on hillsides which spill over with lush and exotic flowers. Its chic appearance, however, hides many exciting contrasts.

The name Bodrum means 'Basement', and its ancient harbour and Castle of the Knights of St. Jhon are reminders of its past as a place of exile for those who fell foul of the Sultan in Istanbul. Nowadays, Bodrum leads the entire



region in boat building and yachting. Since early last century, artists, writers, musicians and famous personalities have settled there, drawn by its natural beauty and the bohemian character of this exciting community. One such personality was the renowned writer, Cevat Şakir Kabaağaçlı, also known as the 'Fisherman of Halicarnassos'. Today, the community is further enriched by the many expatriots who choose to live there, as well as those wealthy Turkish inhabitants who have done so much to develop the town and the coastal area in ways that respect the essential character of Bodrum and its pretty coastal villages.

**Historical Place**

But Bodrum does not only have a vibrant present: it also has a glorious and ancient past. It is built on the site of Halicarnassos, the famous city established in the 13<sup>th</sup> century B.C. As a member of the Dorian Federation, its name is associated with other Mediterranean jewels Knidos, Kos, Kamiros, Lindos and Rhodes. The tales of illustrious former residents bring alive for us the glorious deeds of Bodrum's past. The Greek storyteller Herodotus was born here in 484 B.C. Like a present day war correspondent, he covered the conflict between the Greek and Persians, you may subscribe to the view that history is either bunk, or a pack of lies that we play upon the dead. But what is generally agreed is that Herodotus was the world's first historian and deserves his title of 'Father of History'. So, in a way, you could say that history began in Bodrum.

Moving forward to the early 6<sup>th</sup> century B.C., we find that the original site of Bodrum, Halicarnassos, was ruled by a woman. Artemesia-I was an enthusiastic warrior, so highly thought of that she was appointed an Admiral and joined the





Halicarnassos fleet for the invasion of Athens. So enthusiastic was her battle fervour that she was responsible for the sinking of friendly ships, as well as those of the enemy.

But perhaps the most famous name in the many legends of Halicarnassos is Mausolos, who ruled the city for the Persians from 377 B.C. and brought it to prominence and prosperity with his powerful naval force. King Mausolus built himself a tomb of such splendid magnificence that it became one of the Seven Wonders of the Ancient World. It was known as the Mausoleum and is the origin of the word we use today to describe a grandiose tomb. Nearly 2000 years later, the Crusaders seized the town and used stones from the ruined Mausoleum to build the castle of St. Peter (the Petronium) which still guards the harbour and which gave Bodrum its new name. Although little remains of the Mausoleum but its foundations, the site is well worth a visit. An exhibition fills in the historical detail and contains replicas of the original treasures removed by archeologists, so that as well as appreciating the chic appeal of present day Bodrum, you can glimpse for yourself something of the glory of Bodrum's past.

### THE BLUE VOYAGE

The Turkish Aegean and Western Mediterranean Coast is the haven of divinity. Virgin Mary, the Holy Mother of Jesus, had her last worldly abode in the hills overlooking Ephesus where now,

she rests eternally in a monastery turned into a place of pilgrimage. Apostle John the Theologian who accompanied the Holy Virgin lies in a basilica dedicated



to his name in Selçuk – just a stone's throw from the ruins of Artemision, the temple of Mother Goddess Artemis, whose throne in the hearts of the peoples of Asia Minor was inherited by Mary. Artemision was one of the Seven Wonders of the ancient world another the Mausoleum, is in Bodrum, the home of the Blue Voyage.

Unlike any other yachting vacation, the Blue Voyage offers an insight into the mind and soul of the modern times, through an exploration of the ideas and acts of antiquity. The Aegean, the inspiration behind every ideal that we have come to hold dear since the Renaissance still has lot to whisper to the serendipitous – in this way, the Blue Voyage is also an expedition into one's own spirit: A Blue Voyage is a total escape to one's own essential being where all the worries of ordinary life appear irrelevant. With an unlimited horizon, the spectacularly beautiful shores, placid coves and star spanned

skies, the BLUE VOYAGE inspires feelings of utter freedom and absolute privacy. Having experienced this sense of being at peace with oneself and the universe, many Blue Voyagers return again and again to this pilgrimage into nature, history and the harmony it evokes in the soul.

### LIFE ON A GULET

Our guests cruise on safe, spacious yachts called “gulets” -motor-sail yachts built according to the traditions of old, often out of wood, which offer more than just the basic creature comforts. A gulet is not unlike a small, floating hotel. Chartering a gulet privately is like having one's own yacht. The voyagers can determine itineraries, ports of call, choice of food and drinks and how long to stay in one place. Those who do not wish to, or cannot rent an entire boat for themselves can join one of the cabin – charter gulet cruises. This is a minor version of a cruise on a line, where a certain number of strangers rent a private cabin on a full board basis, sailing on one of the classical itineraries of the BLUE VOYAGE.

### HOW & WHERE TO GO PROGRAMMING A BLUE VOYAGE

The classical routes of the BLUE VOYAGE were explored more than five decades ago by avant-garde bunch of Turkish writers and artists pioneered by Mr. Cevat Şakir, better known as the “Fisherman of Halicarnassos”. He was a classicist, historian and linguist as well as a mentor to quite a few modern intellectuals. Travellers are still advised to basically follow in his wake. Please remember that the Blue Voyage is not something to be rushed, but to be thoroughly savored; not an express sight seeing tour but a communion of an individual's soul with the sea, nature and history. True to its unique spirit, instead of rushing from one anchorage to the next, the ideal itinerary of a Blue Voyage must strike a balance between the time spent sailing, or in various bays and ports and the time required to enjoy them. Veteran voyagers often divide

the coastline between Bodrum and Antalya into four main itineraries and allot at least one week to each. The most favorite Blue Voyage destinations are the Gulf of Gökova, (Jupiter's Gulf), the gulfs of Hisarönü and Sombeki via Knidos, Aphrodite's town between Bodrum, Datça and Marmaris, East of which lie Ekincik, the ruins of Caunos, the Turtles' Beach. Do not forget to take a mud bath in the spas of Köyceğiz. Cruising still Eastward, is the Gulf of Fethiye, perhaps the most popular yachting area in Turkey, bejewelled by the 12 Islands. Sailing Further East, are the Ölüdeniz (Blue Lagoon), Kalkan, Kaş (antique Antiphellos), former fishermen villages now become tourist resorts. The Romans' summer camp in Patara lies at the head of a sandy beach stretching for miles. In the Gulf of Kekova, a real life Atlantis with half sunken sarcophagi and other ancient monuments greet seafarers. Kekova is a short drive from the town of Myra, home of St. Nicholas, the Santa Claus of warmer climes. Continuing toward Antalya, yachts anchor in Olympos where a "sacred" fire has been burning in the wooded hills for millennia. Near Olympos, Faselis lies with its magnificent beach and Roman ruins.

#### **MAINTENANCE AND REPAIR**

In Turkey, the prime locations for yacht manufacturing are Istanbul and Bodrum. However, the Black Sea and Aegean Sea Coasts have quite a few workshops that specialise in yacht building. Although wood is the most common and traditional material used for yachts, some workshops and boatyards also use fibreglass and various metals. In Turkey, the custom designed yachts are built to customer specification in many boatyards, small and big. The most important aspects of yacht building are seaworthiness comprised in an aesthetically pleasing design, combined with perfect, reliable functionality. Yacht building requires an intense attention to detail and highly skilled craftsmanship. This is especially true in relation to external finishing and paintwork, as well as in the design of living quarters

which require careful thought, fine labor and a devotion to perfectionism. Turkey offers all this expertise and a wealth of experience. Within the last few years, in Bodrum boatyards, yacht manufacturing is carried out under the close watch of internationally qualified surveyors. The aim is to build yachts with care, using the best materials and skilled labor within the financial reach each owner who can live proud of the end result. Mega yachts built in Bodrum offer the perfect combination of sturdy seaworthiness, luxury, and functionality, using the latest technology and plush internal and external decor. Due to the extension of the yachting trade and manufacturing in and around Bodrum, yacht maintenance and repair are also widely available. Owners can find a large number of trustworthy boatyards for comprehensive maintenance, repair and wintering and they can also make use of the facilities available from the industrial craftspersons and workshops in the town. A vast army of skilled technicians can be found in Bodrum who can capably repair and maintain hulls of any material, engines, transmission, electronic and electrical systems.

#### **WATER SPORTS - DIVING**

The Bodrum peninsula, is one of the most attractive locations in the world for diving. Bodrum's history of sponge fishing has provided the town with a highly developed infrastructure which has facilitated to make diving a leading leisure sports. The Castle of Bodrum, which is an underwater museum elected one of the world's best eight attest to that subaquatic past with the largest collection of Eastern Mediterranean amphora in any museum, the glass ship wreck (11th century) the Roman wreck (4th cy), the Byzantine wreck (A.D. 625) and the Gelidonia wreck (13th cy) all brought to the surface by underwater archaeologists and now on display here. The sponge fisherman of Bodrum who became an essential component of popular lore here, played an undeniable role in the discovery and excavation of these treasures. Diving in the crystal

waters of Bodrum puts you in contact with the dramas and joys of these seafarers who skipped the waves here for millennia. The recent edict permitting guided dives to underwater archaeological sites formerly prohibited has made the area even more interesting for hyperbaric explorers - however, also lading them with the additional responsibility of exerting every care and caution for preserving this unique common heritage of humanity. While misplacing even as much as a broken piece of amphora may forever prevent a wreck from being discovered, you may be recorded in history as the person who led to the respectful to this very special and fragile cultural and natural environment.

There are various professional, competent, licenced organizations that offer diving instruction and certification at all levels in Bodrum. Courses are held on board private boats and training and excursionary dives held at such well known sites of interest as the Great and Little Reefs, Karada, Flat Rock, Poyraz Cove, Cave with a Whole, Cape Wolf, Orak Island, Kargı Island or Göcek Island. A disused Navy Bunker Ship and a Coast Guard Boat were sunk off the southern coast of Karada in Bodrum, creating for the first time in Turkey, an artificial reef for under water touristic and sporting activities. You can also advance your P.A.D.I or C.M.A.S. degree.

Meanwhile, your non - diver companions can enjoy a sunny day in the sea, in one of the most beautiful spots in the country and share with you the delicious food your captain or crew prepare. Watersports in Bodrum are not limited to diving, there are over 70 licenced water sports centers around the peninsula equipped with the latest technology that offer wind surfing and dingy sailing in the best conceivable breeze in Bitez, Gümbet or Akyarlar, water skiing or jet-ski riding in perfectly protected bays and the more exotic pastimes as aquagliding or parachuting, banana or ring riding. What a day to prepare you for the sizzling nights of Bodrum!

## FETHİYE

# FETHİYE: PARADISE OF MARINE TOURISM



**İLKAY TUGAY**

*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING FETHİYE BRANCH*

Today, Fethiye is a candidate to be recognized as a “Paradise of Marine Tourism” by the whole world. Located in the southwest of Türkiye on the Mediterranean coast, Fethiye is the center of Mediterranean voyages with its abundance of accommodation facilities, beautiful bays and the development of yacht tourism.

It is a very special center of attraction thanks to its turquoise blue waters, countless picturesque tiny bays, fertile Mediterranean flora and geography where not even a drop of rain falls from June to September. Fethiye Bay functions as a natural harbour, making it an important stop for yachtsmen from all over the world and is also one of the starting points of the famous Blue Voyage.

As Chamber of Shipping (DTO) Fethiye Branch, our area of responsibility covers the districts of Fethiye (Göcek), Dalaman and Ortaca (Dalyan) with a coastline of 242 km at sea. In terms

of marine tourism activities, thanks to our advantages such as our location and capacity, we have a wide range of activities such as blue voyage, daily boat tours, bareboat, regular passenger boats, sea taxis, surface and underwater sports and ferry services.

Apart from the popular “mass tourism”, our region also has excellent opportunities for “alternative tourism” activities required by the understanding of sustainable tourism in harmony with nature. Underwater diving is an important element of this alternative tourism. It has developed rapidly in recent years and its enthusiasts are rapidly increasing all over the world. An old 42 m long Coast Guard boat was sunk in the Fethiye Dalyan Creek and put into service for diving lovers. Fethiye is also an ideal place for diving enthusiasts with sea water temperature varying between 14-28 degrees for 12 months, 40 meters visibility and extraordinary underwater life and plant richness.

In bareboat yachting, you can rent ready to use yachts and deliver it at the end of the trip. You can plan your trip where the captainship of the boat is entirely yours and you are free to choose your route. The beaches in Çalış and Karagöz areas, both accessible by road and sea, are 4 km away long. Charter boats





provide service between Fethiye and Kaş. You can see many unique bays with daily tour boats in Fethiye, Göcek and Ölüdeniz regions, and can have fun and relieve stress with water sports such as windsurfing, kitesurfing, water skiing, parasailing, ringo and banana.

The longest coastline of our country is in Muğla city. Our country has many more bays along its coastline than other countries in the Mediterranean. Every bay in our region has a unique

beauty and untouched charm. Some of our world-famous bays within the boundaries of our region include Sarsala Bay, Yassicalar, Tersane Island, Taşyaka (Bedri Rahmi) Bay in the Göcek region, Turunç Bay, Kalemiye Bay, Dalyan Bay in the Fethiye region, and Blue Cave, Kabak Bay, Butterfly Valley in the Ölüdeniz region. Fethiye and Göcek Ports, which are under our responsibility, host many mega yachts with their bays and marinas. Skopea Marina, D-Marin and Port Azure marinas



in Göcek are capable of hosting mega yachts. In Fethiye, they can dock at the pier of Muğla Metropolitan Municipality. Yacht moorings and marinas around Göcek and Fethiye operate at almost full capacity.

Especially during the pandemic period, Abramovich, Russian Oligarchs, Middle Eastern Sheikhs and Bill Gates were among those who visited our country the most. News such as Bill Gates celebrating his birthday on a private beach during his visit with his boat named 'Lana', and Jeff Bezos and other guests being in our region with their yachts, have contributed greatly to the promotion of our region. Fethiye has become one of the important tourism destinations on the radar of yacht guests with its popular beaches and restaurants.

Dalaman International Airport is only 50 km away from the city. Those who stay in Fethiye, a place intertwined with history, nature and the sea, can easily visit the nearby ancient cities such as Kadyanda, Pinara, Tlos, Sidyma, Xanthos, Letoon and Patara. Walking along the ancient Lycian paths is the best way to see the floral richness of Fethiye. You can walk the Fethiye - Kaş road and pass through Faralya Village, the ancient cities of Pinara, Letoon and Xanthos along the route. While traveling from Fethiye to Marmaris, you can see the ancient city of Counos and the wonderful Iztuzu Beach. Iztuzu is a 4.5 km long Mediterranean beach located near the Dalyan town of Ortaca district of Muğla. It is also called "Turtle Beach" because the caretta caretta lay their eggs here. Historical places such as Radar Hill, Çandır Observation Terrace, Kaunos King Tombs, Kaunos Ancient City are among the places to visit close to Iztuzu beach.

As İMEAK DTO Fethiye Branch, we lead activities that would raise awareness with our sustainable marine tourism projects. As seafarers, we work to protect our nature and bays in order to leave a legacy to our future generations and to maintain sustainable marine tourism.

## İSKENDERUN

# 27 PORTS, PIERS AND OFFSHORE FACILITIES IN İSKENDERUN GULF



**KEMAL KUTLU**

CHAIRMAN OF İMEAK TURKISH CHAMBER OF SHIPPING İSKENDERUN BRANCH

İskenderun took its place in world history as the first city named after Alexander the Great, and came to the fore with its piers for the transportation of agricultural products and olive oil by sea during the Pre-Roman and Roman periods. During the era under Ottoman rule, İskenderun started international shipping with a decree issued by the Sultan Murat III in 1592. The first customs building was established in 1593. Until it was connected to Türkiye and the Republic, it carried Chinese, Iranian and local cargo to European Ports with its nearly 40 Turkish and foreign-owned piers. During the Republic period, industrialization started in our region and became one of the main sources of

income for the people along with Port Management, Agriculture, Fishing and Tourism.

In Hatay province; there are a total of 6 organized industrial zones with legal entities, including Antakya, Payas, Erzin, İskenderun 1, İskenderun 2, and Altınözü Enek Agricultural Specialized OIZ. 40% of Türkiye's Iron and Steel production of 13.8 million tons is produced in our gulf. It is the most important region of Türkiye in filter production with 30 million units annually.

We also have chemical industry and citrus packaging facilities.

### PORTS AND PIERS:

There are 27 Ports, Piers and offshore facilities in our Gulf. We handled 59 million tons in 2022, 56 million tons in 2023 in the İskenderun Port Authority area, 67 million tons in 2022 and 52 million tons in 2023 in the Botaş Port Authority area.

The exit points of 2 Iraq-Türkiye Pipelines and Baku-Ceyhan Pipeline are in our gulf.



See İskenderun Gulf Port Map <https://iskenderun.denizticaretodasi.org.tr>

### FISHING AND AGRICULTURE:

There are 4 fishing ports in our bay. 121 of the 450 boats registered in the ports are trawlers. The Gulf is a spawning ground for many fish species. İskenderun Gulf is especially rich in Jumbo shrimp species.

The breeding grounds of the endangered Green Sea Turtles (Chelonia Mydos), which lay eggs at an average of 60 different points between Dörtöl and Samandağ beaches in the Gulf of İskenderun every year, and the Mediterranean Monk Seals, which live in seal caves at the foot of Samandağ Kel Mountain, also attract the attention of local and foreign tourists. All kinds of agricultural products, including cotton, grow in the Amik plain. Kırıkhan - Reyhanlı region stands out with carrot and onion farming, while Dörtöl is an



important citrus production center, and Arsuz stands out with banana greenhouses and olive production.

#### **TOURISM:**

Aiming to be recognized in the coming periods with the recent and planned investments in the marine tourism sector, İskenderun Gulf is preparing to host many guests from diving to yacht tourism to faith tourism. With the discovery of Bilge Taş Underwater Cave, the number of diving spots increased to 13 which are İskenderun, İskenderun-



Sarıseki, Dört Yol, Dört Yol-Yeşilyurt, Arsuz, Arsuz-Konacık, Arsuz-Kaleköy, Samandağ, Samandağ-Çevlik, Yayladağı (Keldağ), Yayladağı Karamağara, Yayladağı (Kamışlı), Yayladağı (Uzunkaya). In order to develop diving tourism in Karamağara Bay, a diving tank filling facility and a diving

center investment project has been implemented, and with this project, Karamağara Bay, an archaeological site, will be brought to international diving tourism.

#### **KARA CAVE DIVING CENTER**

Madenli Yacht and Water Sports Center, which was transformed from a fishing port to a marina, was put into service in 2021, eliminating an important deficiency of the region in terms of water sports and yacht tourism. With the opening of the Yacht and Water Sports

Center, our local people now have a safe shelter for their yachts, while yacht lovers are able to access yacht rental opportunities.

#### **MADENLİ MARINA**

Although the exact construction date of Saint Pierre Church, which was declared



a place of pilgrimage for Christians by Pope Paul VI in 1983, is unknown, it is believed that it was the place where St. Peter, one of the twelve apostles of Jesus, first preached and that the community in the cave first took the name 'Christian'.

#### **SAINT PIERRE CHURCH**

In order to be protected from life-threatening floods and overflows coming down from the mountains, Roman Emperor Vespasian ordered the construction of a tunnel that would go around the city of Çevlik Ören in Hatay's Samandağ District, thus changing the direction of the currents. Construction started in 69 AD and was completed by his successor and son Titus in 81 AD.

#### **TITUS TUNNEL**

Hatay Archeology Museum, one of the largest mosaic museums in the world, Habib-i Neccar Mosque, Antakya Ulu Mosque and many other historical and cultural monuments, which were damaged in the February 6 earthquake, have been taken under protection by the relevant authorities and reconstruction (renovation-repair) works have started.

#### **HATAY ARCHEOLOGY MUSEUM**

Additionally, Naval Museum of İskenderun, which was opened in 2009, is Türkiye's 3rd naval museum after Istanbul and Çanakkale. The museum complex consists of a building built in 1930 and an open-air naval park.

## İZMİR

# NEW COOPERATION OPPORTUNITIES IN THE MARITIME INDUSTRY



**YUSUF ÖZTÜRK**

*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING İZMİR BRANCH*

İzmir is one of Türkiye's leading industrial and commercial cities with 13 industrial zones and two free zones. As a 5000 year-old port city, İzmir connects the Aegean and Western Anatolia to international trade corridors by sea. In 2023, it served to the Aegean Region's exports of 42.6 billion dollars and imports of 20.9 billion dollars.

The trade and maritime capability found in İzmir's genes has led our region having powerful shipowners, port operators, ship agencies, ship builders and suppliers, and companies operating in every sub-branch of the maritime industry with a deep-rooted history.

İzmir is a port city with 16 ports/piers. 10 of the ports serve general cargo and

dry bulk cargo ships, 8 serve liquid bulk cargo, and 4 serve container cargo and ships. İzmir Ports are a natural bridge between Asia and Europe with 220 direct port connections, handling 92 million tons of cargo, having 4.25 million TEU container handling capacity, around 2 million TEU containers and 75 thousand Ro-ro transportation.

Our convenient location on transportation corridors such as the Belt and Road Project also increases the potential of the regional maritime industry.

The only publicly operated port among İzmir Ports is TCDD İzmir Port. Today, it is the first largest port in the Aegean Region and the second largest port in Türkiye in terms of pier length and rear

site size. TCDD İzmir Port is also the only port in the Aegean Region that can serve all types of ships and cargo in terms of service diversity. With this feature, it constitutes the most important logistics infrastructure of the region. During the period when the capacity of İzmir Port was insufficient, the container ports established in the Aliğa region in the north of İzmir showed rapid development, and in 2023, 81,355,000 tons of total cargo and 1,585,000 TEU containers were handled in Aliğa Ports.

Also in the north of İzmir, the superstructure of the North Aegean Çandarlı Port project is planned to be completed and put into operation. It is expected to operate within the integrated port and the industrial zone and have final capacity of 12 million TEU.

### **HIGH POTENTIAL IN THE SHIPPING AND LOGISTICS INDUSTRY**

Our region's direct Ro-Ro connections to Europe strengthen our logistics performance. Last year, the total number of vehicles transported on the Çeşme-Trieste (Çeşme Ulusoy Port) line was 70 thousand, and the number of vehicles transported on the İzmir-Sète (İzmir Port) line was over 5 thousand.

In order to evaluate the potential of our region in the shipping and logistics industry, our members show great interest in the leading fairs in the shipping industry, especially Posidonia, Breakbulk Europa, Breakbulk Middle East.

With the support of our industry to make İzmir the meeting point of the international transportation industry, İzmir Fuarçılık A.Ş. has been organizing the Logistech (Warehousing and Technologies Expo) for two years. Making significant contributions to the maritime industry with its increasing



international exhibitor and visitor profile, Logistech will be held for the third time this year on September 11-13, 2024. We wish to have our fair to cooperate with Posidonia and similar shipping fairs.

Posidonia is organized by Greece, which operates 21 percent of the global ship fleet capacity and 59 percent of the

We believe that Posidonia, as one of the important shipping fairs of our region, will bring new opportunities for Turkish companies this year as well. We hope that Greek shipping and Turkish shipping companies will evaluate trade opportunities and that our companies will make new connections, paving the way for cooperation between Piraeus Port,

convenience provided by the visa application valid for the duration of the fair this year.

Although our country's products travel to all over the world without encountering any obstacles, Turkish sailors, who are a member of international trade and global maritime transport, experience



European ship fleet capacity; and in 2022 after the pandemic, it managed to bring together 1,964 participating companies from 88 countries and 28,892 visitors from 103 countries.

one of Europe's leading ports, and İzmir Ports.

We would like to thank the authorities of Greece hosting the fair, for the

problems due to the Schengen visa. We expect new steps to be taken for urgent and permanent solution to improve the cooperation in the maritime industry of the two countries.



## KARADENİZ EREĞLİ

# WESTERN BLACK SEA OFFERS UNSPOILED BAYS WITH A BREATHTAKING NATURE AND SEA



**OĞUZ ÜNLÜER**

*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING KARADENİZ EREĞLİ  
(WESTERN BLACK SEA) BRANCH*

As IMEAK Chamber of Shipping Western Black Sea Region, our area of responsibility covers the cities of Zonguldak, Bartın, Karabük, Düzce and Sakarya with a coastline of 280 km. The Western Black Sea Region has an important potential in terms of nature, culture, plateau and marine tourism with its virgin bays, untouched nature and sea, and many tourist attractions. 63% of the region consists of forests and moorland. It contains many values suitable for nature tourism, which can also support rural development. Küre Mountains National Park and Yenice Forests are the most well-known ones. In addition to nature tourism, the region is also suitable for culture, history, congress and coastal tourism. Among the most valuable touristic values is Safranbolu,

which is given the title of “World Heritage City” by UNESCO, and Amasra Castle, also added to the World Heritage Tentative List. Kurucaşile is known as the place where the mountains touch the water and where the first wooden boat in the world was floated. It continues its fame today as the place where the most beautiful wooden Turkish gulets are built.

### **CRUISE TOURISM**

Amasra Port is a permanent maritime border gate in the Western Black Sea, open to international entry and exit. It has the potential to be an important port of call and supply for “cruise ships, local and foreign flagged yachts. The Port has a pier of 240 meters, water depth ranging from 6 to 15 meters and a width of approximately 20 meters.

Astori Grande Ship, which organized 33 voyages to Amasra in 2023, brought more than 17,000 tourists and more than 10,000 personnel to Amasra in the 2023-2024 tourism season. The ship has planned 45 voyages to Amasra for the 2024-2025 tourism season.

### **SUMMER TOURISM**

Our region is very rich in terms of natural beauties. It offers many natural resources and beauties for tourism with its bays along the Black Sea coast, amazing beaches, caves, vegetation that can remain green throughout all seasons, and forest recreational areas. Many natural beaches and sandy beaches in the region are among the main places that guests can use on a daily basis during the summer months. Bartın, also located in our region, is among the important and developing cities of Türkiye in terms of its deep-rooted history, touristic values, forests and natural beauties. Amasra district stands out in tourism. It is a green district with a natural structure consisting of 7 hills, a peninsula, two islands and two bays. Mehmet the Conqueror described Amasra the “Eye of the World”, and the city was awarded the title of being Türkiye’s first tourism town in 1942.

### **DIVING TOURISM**

With a coastline of approximately 280 kilometers, our region offers opportunities for underwater diving enthusiasts besides its sandy beaches. There are suitable areas for enthusiasts of this sport at many points between Zonguldak and Kdz. Ereğli, such as Bababurnu, Filyos Martı Kayaları Location, Limancık, Kandilli (Armutçuk Beach), Çavuşağzı Köyaltı Location and İlıkısu Bay.

### **GERMAN U20 SUBMARINE WRECK**

U20 is one of the 6 U-boat type submarines sent to the Black Sea by



the German Navy during World War II, and was sunk by its own personnel on the night of September 10, 1944, trying to prevent military secrets from falling into the hands of opposing forces. The location of U20, a member of the 30th Fleet, known as one of the lost U submarines of the German Navy for more than half a century after the war, was discovered during a naval exercise carried out in the region by the Turkish Navy in 1994. With the detailed studies

1 of the U-20 submarines has survived to the present day, and since it sank without breaking apart and in shallow waters, it is very well preserved and is a good treasure to shed light on the past.

#### SEA SPORTS

There is a Sailing Specialization Club in Karadeniz Ereğli, which was established to promote sailing sport and provides training in categories of Optimist, laser and surf. There are opportunities to do



carried out after this date, it has become a new center for diving tourism. Since the crew left the submarine before they died, it is not considered a war grave, so diving is allowed. It is stated that only

water sports in many parts of Sakarya, especially in Lake Sapanca. For this reason, many sports fans come to Sapanca in the summer to experience

this natural beauty and do sports. Sapanca offers water sports of skiing, sailing, rowing, wakeboard, knee board, catamaran, canoe, depending on the weather, windsurfing and other vehicles that can be rented on the lake shore.

#### BLUE VOYAGE

Many sailboats and motor yachts come to the region with the Black Sea yacht rallies held every year. Kdz.Ereğli district of Zonguldak, located in the Western Black Sea region, is close to Istanbul and therefore has a suitable location and infrastructure for services such as marina management, boat land park, supply, maintenance and repair for yachts. There



are approximately 3-4 hour boat trips in Akçakoca and Amasra, and short tours within the harbor in Kdz.Ereğli.

In order to revitalize sea tourism by Akçakoca Municipality, a tour of the Black Sea can be made along the 35 km coastline with the tour boat named Pusula Catamaran, which serves approximately 300 people. In addition to sea tours, the boat also serves as a restaurant and cafe.

5 daily excursion boats in Kdz.Ereğli Port provide tours to tourists and local people along the coastal route.

#### RAFTING

Düzce, a small province of our Western Black Sea region, is one of the important centers for rafting. Düzce Melen rafting facilities bring together 20,000 rafting lovers in Melen Stream every year. Düzce Melen Stream is a river suitable for amateur rafting athletes and has a difficulty level of 3+1.

## KOCAELİ

# KOCAELİ: THE TOWN OF PORT AND INDUSTRY



**VEDAT DOĞUSEL**

*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING KOCAELİ BRANCH*

Let's briefly talk about our city of Kocaeli: why is Kocaeli important? Kocaeli has an important geographical location. It is a very rare city having coasts on two seas, the Black Sea and the Marmara Sea, which has always made Kocaeli an important city throughout its history such as during the period of the Nicomedia, Byzantine and Ottoman Empires that dominated the region and now the Turkish Republic. Our city is an important center in the military and commercial fields, and now added a new one to its economic activities with industrialization movements during the Republic period. The industrial sector shows a development in direct proportion to the hinterland of our region. As for the industrial structure of Kocaeli, there are companies registered in Kocaeli among the top 500 largest industrial

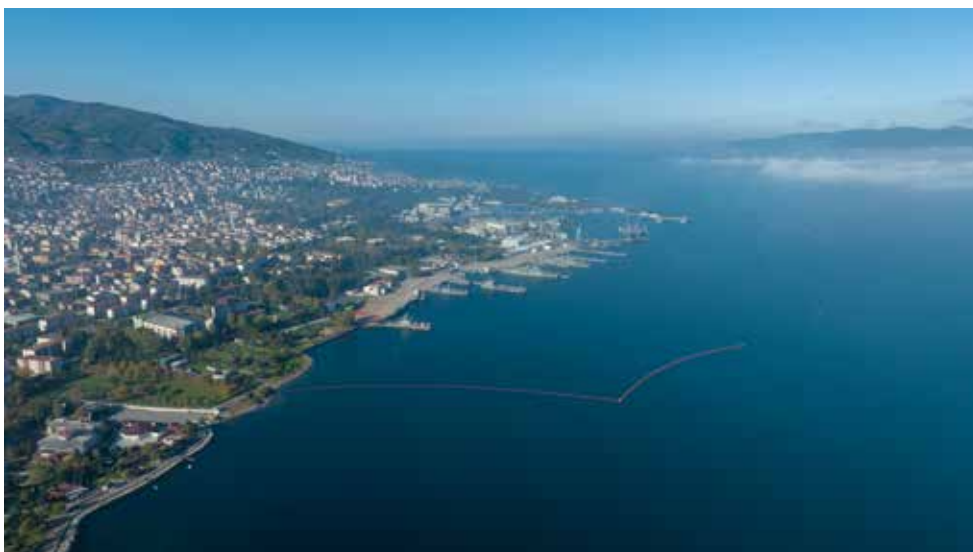
enterprises of our country announced by Istanbul Chamber of Commerce every year, as well as commercial enterprises with the nature of SME in every sector, both production and service fields, and also 14 Organized Industrial Zones, 5 technoparks and 2 free zones.

The most important feature of our city is that it is a port city. It is the entrance and exit gate of Anatolia in maritime transportation, and the existence of strong distribution channels with the Northern Marmara and Osmangazi bridges provide Kocaeli with a maritime advantage. The fact that Izmit Bay has a total of 36 port facilities on a 112 km coastline and that our ports have high ship and cargo handling capacities have made Kocaeli the 6th largest port in Europe. We can show

that the importance of our city in the Turkish economy with the following statistical data. 18% of the ships arriving throughout the country and 16% of the cargo handling take place in our city. Our share in transportation for Foreign Trade is 18%. And 16% in exports and 18% in imports in Turkish maritime transportation. Our city provides high added value to the Gross Domestic Product, ranking first among all cities with its per capita national income of \$18,269.

Regional Directorate of Eastern Marmara Customs and Foreign Trade operating in Kocaeli has 5 Customs Departments. A total of 38,080 million dollars of exports and 80,594 million dollars of imports were made in 2023 in the areas of expertise of these Customs Departments, while the tax collected is 346,544 million TL. Compared to 2022, there was an increase of 9 per thousand in our exports and 13.2% in our imports. However, the increasing trend has been gradually decreasing in the last three years. The negative impact of the Russia-Ukraine war on the global economy, economic stagnation due to high inflation and low growth in the global economy, the risks created by geopolitical tensions, the exchange rates remaining below competitive levels are some of the reasons for this decline in our foreign trade rates.

As I mentioned before, Kocaeli is an important industrial and port city. It is the entrance and exit gate of Anatolia, both with its hinterland and geographical structure. It shows that it can have a potential much higher than the current figures with its lands where warehouses and storage can be made, creating opportunities to provide and develop sea & railway connections, and being a foreign trade gateway not only for the companies operating in our city, but also for the neighboring cities and even for Anatolian companies. As for the



threats that would affect this potential, we can point out the insufficient highway entrances and exits to Kocaeli port areas, traffic problem and irregularity as handicaps.

Our city, Kocaeli is one of the most important cities of our country in terms of the applicability of the blue economy. We know that all kinds of commercial,

dollar project, which is carried out by Kocaeli Metropolitan Municipality with the support of the Presidency and the Ministry of Environment, Urban Planning and Climate Change, is one of the biggest steps taken to clean the Gulf of Izmit and will set an example for Türkiye in a short time. Another project is the logistics village project supported by our Ministry of Transport and Infrastructure



sportive and social responsibility activities related to the sea, including fishing, shipbuilding, maritime transportation and marine tourism, are carried out and can be carried out in Kocaeli. As IMEAK Chamber of Shipping, Kocaeli Branch, we closely follow sea-oriented projects. We are also aware of the importance of the Izmit Bay “Bottom Mud Cleaning” project. We think that this 120 million

and led by Kocaeli Metropolitan Municipality. This project aims to save our urban roads from large vehicles, to make land transportation faster, and to ensure that import and export products are kept tidier. This project will allow the cargo handling capacity of the ports in the city to be increased, which is very important for our country and the maritime community. We would like



to express our support for the goal of expanding the rail system network, which will enable ships to quickly unload and leave their cargo, and to increase the handling capacities of ports without filling the sea.

Apart from all this, in order to revitalize Kocaeli’s marine tourism and ensure that it reaches the place it deserves, we are carrying out intensive works on the beaches of our district Kandıra with our Kocaeli Metropolitan Municipality, Kocaeli Provincial Directorate of Culture and Tourism, Kandıra District Governorship and Kandıra Municipality. The existence of shipwrecks in our seas throughout history, from ancient times to today, enriches undersea tourism in Kocaeli. Kocaeli offers nature-based tourism opportunities to its visitors with its 7 blue-flag beaches and natural beauties such as Kandıra, Kefken Island, Pink Rocks and Kartal Rocks. I would also like to briefly touch upon the ‘Kerpe Underwater Archaeological Park Project’. Our project is really very important as it will be a first in Türkiye in line with the coordination and permits of the Ministry of Culture and Tourism, General Directorate of Cultural Heritage and Museums. With the implementation of the Kerpe Underwater Archaeopark Project, Türkiye will have an underwater archaeopark exhibiting real artifacts. There is no underwater museum with archaeopark track where real artifacts are exhibited in any country in the world except Italy and Croatia. Thanks to the Archeopark project, the archaeological diving tourism will be integrated into national and international tourism networks will be ensured.

## MARMARIS

# MARMARIS IS FULL OF SURPRISES IN TERMS OF TOURISM AND SEA CULTURE



*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING MARMARIS BRANCH*

Marmaris is a district and holiday resort located in the southwest of Turkey, in the province of Muğla. Marmaris, where the turquoise waters of the Mediterranean and Aegean Seas meet, is famous for its natural beauty and the opportunities it offers in terms of natural beauty.

From a maritime perspective, Marmaris is an important center for its fascinating bays and yacht tourism. Marmaris Marina is an important stopping point for yachts traveling in the Aegean Sea. Our region is an important destination for blue cruises and daily boat tours, and it also offers an attractive environment for those who want to engage in water sports such as diving, parasailing, and windsurfing.

Looking at Marmaris's maritime history, it has been an important port city since ancient times and has been a sea trade center throughout history. Marmaris's cultural and touristic richness based on maritime is an important attraction

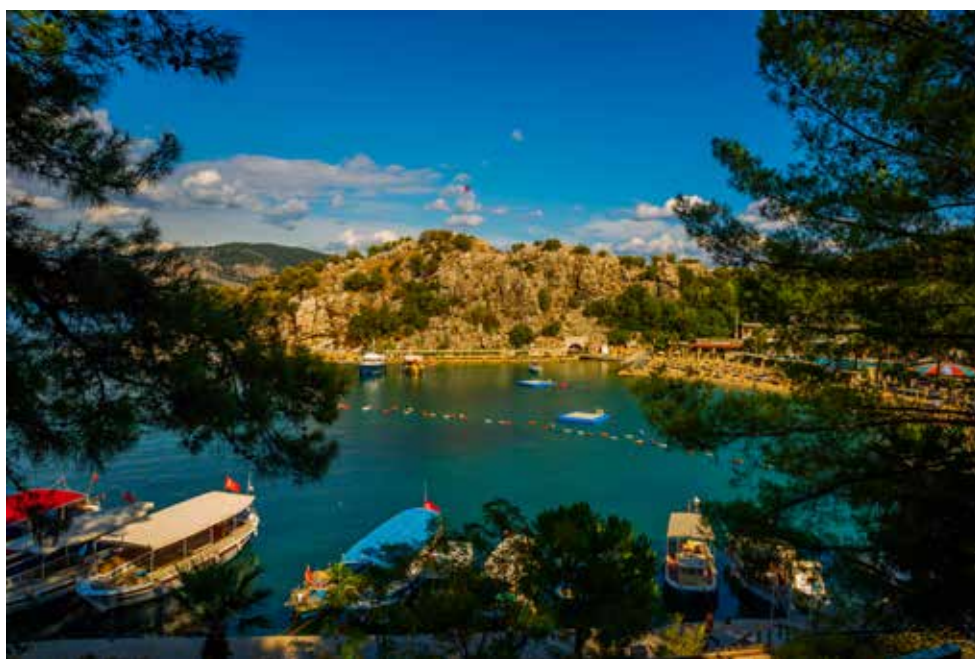
center of the region. The modern marinas and ports in our region offer yacht owners and sea enthusiasts a wide range of facilities. Marmaris Marina is an important stopping point for yachts traveling in the Aegean Sea and hosts many international yacht races and events every year.



In addition to its maritime culture, Marmaris's historical texture is also remarkable. The streets of Kaleiçi, traditional Turkish houses, and ancient structures offer visitors a unique atmosphere. Bozburun Peninsula is known for its tranquil villages and natural life. Among the villages in the region, Bozburun's fishing boats and wooden sailboats reflect the region's maritime talent and tradition on a global scale.

Bozburun Peninsula offers a clear turquoise sea with its natural beauty and coves worth seeing, where sea turtles and dolphins can be frequently seen, offering an environment that will appeal to sea lovers. Visitors to this area can escape the hustle and bustle of city life and enjoy nature and history. In addition, the surrounding villages such as Hisarönü, Orhaniye, Selimiye, Söğüt, Taşlıca, Turgut, Bayır, and Çiftlik Cove are among the beauties of the region.

The beaches, coves, hiking trails, and daily tours in the region are a great option for spending time on the peninsula. Also, the Datça Peninsula, which we are intertwined with, the Gökova Gulf,



and Akyaka, which is a holiday resort located at the point where they meet, are prominent with their natural beauties and peaceful atmosphere. Akyaka, with its famous red-roofed houses, stone streets, and stunning views of the Gökova Gulf, is one of the best spots in Turkey for windsurfing (kite surfing) enthusiasts, located at the point where the Azmak River flows into the sea.

Another unique city in our region is Datça; One of the most important features of Datça, which is about 70 km



away from Marmaris, is that it is the point where the Mediterranean and Aegean Seas intersect, hosting the civilization of both regions. The ancient city of Knidos on the other side, founded in the 4th century BC, is an important port city of the ancient period in the fields of medicine, mathematics, maritime, and art.

Also, the ancient theater and ruins in the city reveal the splendor of the city.

#### WHY SHOULD I CHOOSE THE MARMARIS REGION FOR A VACATION?

Marmaris and its surroundings are a destination that offers a wide range of holiday opportunities, from natural beauties to entertaining activities. For these reasons, considering Marmaris in your holiday plans will ensure that you have an enjoyable time.

There are many places to visit in our region. Our region is very rich in terms of Sea Tourism.

1. Ideal all year round
2. Magnificent beaches
3. Natural beauties
4. Historical and cultural richness
5. Entertainment and activities
6. Food and drink culture
7. Accommodation options
8. Marmaris Marina
9. Shopping and markets
10. Thermal waters
11. Nearby excursions
12. Awards it has
13. Water sports
14. Nightlife
15. Natural parks and conservation areas
16. Marmaris International Race Week
17. Health and spa facilities
18. Yacht tours and boat trips

19. Jeep safari
20. Horse safari
21. Marmaris Museum
22. Village tourism
23. Kitesurfing
24. Proximity to Greek islands and day trips

#### MARMARIS:

- Blue cruise
- Daily boat tours
- Water sports
- Cleopatra beach (sedir island)
- Marmaris castle and museum
- Off-road jeep safari
- Marmaris water parks
- Günnücek forest (liquidambar trees)
- Bicycle tour
- Nimara cave
- Dalyan boat tour
- Bar street and nightclubs
- Çiftlik cove
- Kumlubük cove
- Turgut waterfall
- İçmeler canyon
- Turunç amos ancient city
- Bayır thousand-year-old plane tree
- Gerbekilise cove
- Taşlıca (fenaket) sparrow port
- Bozukkale
- Çubucak
- Reşadiye neighborhood M. Ali Ağa Mansion datça
- Knidos ancient city
- Akyaka woman river
- Akyaka forest camp
- İbrahim ağa mosque
- Sarıana tomb
- Diagoras monument tomb (Turgut)
- Osman baba and murat baba tombs
- Marmaris gyrocopter tour

#### DATÇA:

- Kızlan local windmills
- Apollon sacred area
- Knidos ancient city
- Knidos cape sarpi lighthouse
- Palamutbükü
- Datça port
- Can Yücel house
- Old Datça
- Almond blossom festival
- Beaches and coves
- Boat tours



JUNE  
28  
2024



# Bosphorus ShipBrokers' Dinner 2024

## Lütfi Kırdar Congress Center

You are cordially invited to 6th Shipbrokers' Dinner in Istanbul  
which will be held in Lutfi Kırdar Congress Center  
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# “TURKISH SHIPBUILDING INDUSTRY VISION: GREENER SHIPS FOR BETTER FUTURE”



**MURAT KIRAN**

PRESIDENT OF THE TURKISH SHIPBUILDERS' ASSOCIATION (GISBIR)

**Please provide an introduction to GISBIR, the number of its member yards and size of workforce.**

The Turkish Shipbuilders' Association (GISBIR) is one of the oldest non-governmental organizations (NGOs) in Türkiye established in 1971. As a shipbuilding country with 600 years of experience, Türkiye has the oldest shipyard still under operation in the world (Imperial Arsenal Shipyard). As of 2023, Türkiye has 85 active shipyards and GISBIR represents the vast majority of the industry. The shipbuilding industry has 36 Floating Docks and 11 dry docks,

quite a huge infrastructure for repair and maintenance. The shipbuilding industry's average workforce consists of 85.000 direct shipyard employees as well as 200,000 employees who work for the supply chain of shipbuilding/repair/maintenance business.

Maximum annual new shipbuilding capacity is 4.79 million DWT and the maximum annual ship maintenance and repair capacity is 26 million DWT. GISBIR is a member of SEA Europe (The Shipyards' & Maritime Equipment Association of Europe) and the ASEF

“ Mr. Murat Kiran, President of the Turkish Shipbuilders' Association (GISBIR) talked about Turkish shipyards that meet the changing demands of the maritime industry with expertise, experience and technical know-how. Shipbuilders' Association (GISBIR) talked about Turkish shipyards that meet the changing demands of the maritime industry with expertise, experience and technical know-how.



Council (Active Shipbuilding Experts' Federation), which are the umbrella organizations of the shipbuilding industry in Europe and the Far East. GISBIR also is a member of the Waterborne Technology Platform (ZEWT Partnership) for involving EU maritime projects.

**How many vessels of what type have GISBIR members delivered this year and have on order?**

The Turkish shipbuilding industry has shown remarkable development through the last two decades especially and is still evolving today with the new demands of





the maritime sector. This development is supported by the know-how and experience gained over the past decades. Having this background, our shipyards can offer a wide variety of vessel types and have proven their abilities by successfully delivering a number of “world firsts” with some 35% of output being eco-friendly and innovative ships.

These include:

- The world’s first battery-powered fully electric tugboat (awarded Tug of the Year and the Green Apple)
- The world’s first LNG-powered tugboat
- The world’s first remotely operated commercial ship,
- Battery, LNG and hybrid-driven ferries
- The world’s largest zero emission ferry
- Zero emission 100% battery powered ferries with autonomous functionality
- Powerships, a new innovative solution for generating electricity onboard and supply to onshore grid, used for mainly African countries
- Offshore Supply Vessels powered by methanol and MDO/HVO
- Successful fitting of sulphur emission treatment (‘scrubber’) and ballast water treatment systems.
- In addition, Turkish yards are leaders in the production of fishing vessels, including the world’s largest live fish carrier; high-tech naval vessels, including the largest ship in the Turkish Naval Fleet; and are the third-largest builders of yachts in the world.

In conclusion, beyond the remarkable examples above, Turkish shipyards employ modern technologies, are certified to international standards, and are capable of building a wide variety of different ship types. Among their areas of specialisation are: oil and chemical tankers, bulk carriers and container ships, heavy lift vessels, multi-purpose ships,

platform support vessels, naval ships and coast guard boats, tugboats, mega yachts & sailing yachts, fishing vessels, car & passenger ferries, and power ships.

### **Can you please provide example of Turkish built reference vessels and international projects or technology developments in which Turkish shipyards are involved?**

A few specific examples would be,

- ‘From Zeetug to Zeeport’: GİSAŞ POWER, the world’s first zero-emission all-electric tugboat, was commissioned by GİSAŞ in 2019, and today provides pilotage and tugboat services at Tuzla Port located in Tuzla shipyard region. GİSAŞ POWER was designed by Turkish naval architects and engineers constructed by a Turkish Shipyard and awarded as Tug of the Year 2021 and as Green Apple in the global market. As of 2023, GİSAŞ with its four zero emission tugs is the biggest zero-emission tugboat fleet owner and manager in the world. In addition, it plans to add two more zero-emission tugs and electrify port handling equipment in order to become ‘The World’s First Zero Emission Port Operator’.

- The EU-Funded H2020 Project ‘RESURGAM: Robotic Survey, Repair and Agile Production for Shipyards’: With 13 partners. RESURGAM project aims at a decisive break-through with Friction Stir Welding (FSW) as a high-integrity, low-distortion, environmentally friendly welding technique to be developed for steel, to facilitate the modular construction of ships across multiple yards, with final assembly at one master yard. It also aims to develop the process of underwater, robotic FSW to allow repairs to be carried out on marine structures without needing to bring ships or platforms ashore to a dry dock. The first demonstration of the new welding technique was carried out by a GISBIR member shipyard.

- Digitalisation of shipyard worker training: GISBIR is successfully finalising the EU-funded ‘Safe Shipyards with Technology-Based Trainings’ project, in which we aim to digitise OHS training by LMS and Virtual Reality Modules.

### **Are there any particular challenges or new regulations impacting Turkish shipyards?**

The Turkish Shipbuilding Industry is fully aligned with IMO and EU environmental goals and has wide experience of the implementation of new technologies and fuel systems. Some member shipyards have already carried out technology pilots for EU-funded projects. At the same time, such new requirements can also cause unfair or unbalanced competition among countries. Some countries may use governmental incentives that do not comply with WTO requirements or some countries may create market based mechanisms or huge R&D funding mechanisms to support their own maritime industries. In Türkiye, maritime business is mainly managed by private and not state-owned owned companies so the private sector tries to deal with competitive issues using their own abilities, but in some cases, a Governmental Strategic Approach is crucial for the sustainability of the industry.

As an example; although Türkiye as a candidate country for the EU can participate in some EU funds it cannot participate in the EU Innovation Fund. This means Türkiye should find a solution in order to balance competitiveness whether by establishing EU ETS Shipping mechanism or by negotiating EU policymakers about participating Innovation Fund. We know that good strategy is a crucial element to improve our industry and support progress.

### **Are there any other issues that you would like to share?**

As GISBIR, we attach great importance to the promotion of our industry in international events. We also participate in many exhibitions and conferences in EU, USA, Singapore etc. as well as organise events ourselves as a host organization. For 2024, GISBIR will host the ASEF General Assembly, ASEF Forum, SEA Europe Board Meeting, Mare Forum Istanbul and Superyacht Türkiye. We will be happy to meet all of our international partners in Istanbul.

# CASTROL IS THE LEADER OF THE TURKISH MARKET



**\*SERHAT BARIŞ TÜRKMEN**

Marine Lubricants market in Turkey is a big growing market, the unique geographic position of Bosphorus, Istanbul become a very high quality hub for marine lubricant supplies.

Our collaboration with Castrol is highly successful, for the last couple of years we are constantly increase our market share and become a global service provider for marine lubricant supplies all over the world. We can give service to our customers all around world with over 1000 ports,

with all the product range from cylinder oils to main engine oils, from hydraulic oils to gear oils, from compressor oils to environmentally responsible lubricants.

Turkey is a very big market, we still did not touch every customer, there are still potential customers we have not contact yet in the marine business. Our vision is to ascend premier global partner of Castrol, characterized by our unwavering dedication to safety, ethical integrity, and regulatory compliance, while fostering a culture of innovation and entrepreneurship that fuels our unparalleled commercial growth. With this vision and our high level of network and competition capability, high level of supply flexibility, lubricants experts with selling full Castrol marine product, deep technical, commercial and financial expertise we are reinvesting and pushing relentlessly to grow the lubricants business to new heights.

In order to reach these goals together Castrol constantly develop new products. New TLX series are one of those which has launched this month with the aim of forward to extended engine protection even under extreme conditions. At Castrol, we are constantly evolving our products to serve ever changing customer

needs and requirements. We have heard from customers that they want a high performing, globally available product able to operate on a wide range of fuels.

As part of our programme of continuous product improvement, we created TLX range – high performance lubricants formulated to service highly rated medium speed engines using residual fuels and dual fuel engines operating on residual fuel and LNG. Our advanced Castrol TLX range offers maximum operation between service intervals and excels in demanding applications It provides excellent engine cleanliness and exceeds OEM limits for deposits. In extensive field-testing Castrol TLX has shown excellent and robust performance – even under the most extreme conditions such as high load, high sulphur fuel, low lubricant oil consumption, and low system oil volumes. The new formulation meets all the requirements demanded from a high-quality lubricant. The TLX range has been awarded no objection letters by the major medium speed engine manufacturers including, but not limited to; Wärtsilä, MAN and MaK.

**\*IMEAK CHAMBER OF SHIPPING BOARD MEMBER / MIRA MARINE - OWNER**

# BUNKERING ON THE WEST AEGEAN COAST LINE OF TÜRKİYE



**\*MUSTAFA ASLAN**

Without any doubts, The Star Hub for Turkish Bunkering Sector is Istanbul Bosphorus Strait. But also it should be well noted that Aegean Coast Line is a significantly developing region for bunker supplies in Türkiye with its ports handling large variety of commodity products at the Northern part of the coast line and newly constructed naval tourism facilities (cruise terminals and marinas) at the Southern part of the Coast Line. On this coast line there are 22 ports and marinas; starting from Karabiga (Southern Marmara Sea) down to Antalya (Mediterranean Sea).

The main fuel supply point for all Aegean Coast Line is Aliğa which has all the fuel terminals of big major oil companies

in Türkiye and also two fully operational refineries producing all types of fuels. All the bunker fuel supplied on Aegean Coast Line is provided by the major companies or refineries in Aliğa. For the supplies within Aliğa and Nemrut Bay (the bay next to Aliğa) barge supplies are more convenient in terms of the higher capacities of barge tankers compared to road trucks. Thus, another advantage of Aliğa bunker call is that beside the bunker supplies of the vessels under cargo, transit passing vessels also can call for bunker if they want to have bunker fuel in Aliğa Strait, which is a great advantage of Aliğa indeed. Since vessels calling for bunkers only in Aliğa do not need any custom clearance or port call for the bunker supply, they keep their transit

sail and continue without any check in or out after the bunker delivery.

Due to the long maritime sailing distances in between Aliğa and the other ports on Aegean Coast Line, road truck supplies are much more convenient for the ports other than Aliğa.

As mentioned above other than commercial vessel bunker supplies, the region is very famous with its newly constructed naval tourism facilities. On the land side of all the coast line, there are many significant historical spots and very famous summer time tourism places like Bodrum, Fethiye, Marmaris and so forth.. These spots catch the attention of cruise passengers and naturely assigns

all the coast line as a worth seeing cruise destination. We have four very well managed and strong substructured cruise terminals on the coast line which welcome many tourists and cruise vessels during the whole year.

In terms of naval tourism, the region has another great advantage which is its very beautiful sailing destinations for the yachts. As a result, a lot of marinas popped up in the Southern part of the coast line recently. Most of these marinas have maritime borders within themselves or have a maritime border close by. So most of all are convenient for custom clearance, passport control and duty-free bunker supplies for the yachts. Besides the great sailing destinations of the coast line, all the coast

line has a great logistics advantage due to the close positions of the marinas to Greek Islands. Just after the bunker delivery and custom clearance the yachts can easily switch to Greek Islands within a few hours of sailing distance.

In conclusion, you would be more than welcome to share any enquiries and/or bunker calls with us for the yachts, container vessels, bulk carriers, tankers, cruise ships or any type of sailing vessel in Aegean Coast Line of Türkiye for a smooth and flawless bunker supply. Warm Regards from Aegean Sea!

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**\* CHAIRMAN OF ASMİRA GROUP**

## BEING A PART OF HISTORY



**\*HÜSEYİN ŞAHİN**

Two of the eight strategic narrow straits in the world are in Türkiye. These straits are now seen as important ship supply points by the world since approximately 40,000 ships pass every year. For this reason, both the private sector and public institutions are improving themselves in order to meet the emerging demand in a fast, competitive and high-quality manner. In order to solve the emerging problems, the industry and its stakeholders should act together and continue to follow a customer-oriented policy.

Major changes in the maritime industry begin primarily with the types of fuel used on ships. Wind, coal and steam energy had previously been the main fuels, and then the era of liquid fossil fuels began about a century ago. And now, taking into account the changing needs of the world, the need for renewable energy has emerged. 2020 was the beginning of a significant change for the bunker industry. It seems that this change will continue to accelerate. Regarding alternative fuels and the changes they bring, our country and our industry will complete the transformation as quickly as possible in the near future, as in the past, and will continue the leadership we have shown in our region.

In addition, the process of designating the Mediterranean as SECA (sulphur emission control area) will significantly affect both the bunker industry and the industry stakeholders in our region. After declared as SECA by IMO, the sulphur content in the fuels used in navigating ships in the Mediterranean will be applied as 0.1% instead of a maximum of 0.5%.

2020 was the beginning of a significant change for the bunker industry. It seems that this change will continue

to accelerate. This is very important from every aspect. As world seafarers, we have to carefully do the necessary work for a more liveable world, a more sustainable environment, a greener future and cleaner seas. Being at the centre of this transformation will be very important for us, the seafarers, to be a part of history.

Another important issue is that our country is very popular in marine oils. Although the rapid increase in the number of brands operating in our country in recent years makes competition difficult, it will be challenging to increase quality. In this regard, improving market conditions, increasing service quality over the years, and proactive approaches to the extraordinary conditions experienced around our country have made our straits especially attractive.

As a result, we, as seafarers, have shown over the years how successful we are in overcoming the problems we encounter and adapting to innovations, as always. I have no doubt that this will continue in the future.

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**\*BUNKER COMMITTEE CHAIRMAN OF TURKISH CHAMBER OF SHIPPING**

# SUSTAINABILITY IN MARITIME TRANSPORT



\* SEÇKİN GÜL

Maritime transport handles about ninety percent of the world's trade volume. Every year, 60 thousand vessels transport 11 billion tons of cargo by sea. Maritime transport accounts for approximately 3.1 percent of global CO2 emissions. In light of this, prioritizing greener practices in maritime transport, essential for sustainable trade, should be a key mission for all stakeholders in the industry. "Sustainability" is an approach that considers the ability to fulfil the needs of future generations while also addressing present requirements. This concept necessitates a balanced utilization of natural resources and the environment, while also harmonizing economic, social, and environmental aspects. This is accomplished by implementing strategies across different areas, including efficient resource utilization, minimizing environmental impacts, and promoting social justice.

Today, the term "Carbon Footprint" is commonly used to refer to the amount of carbon emissions (typically measured in tons) produced by an activity or organization. Carbon emissions from burning fossil fuels build up in the atmosphere when there isn't enough biological capacity to absorb them.

Therefore, carbon dioxide emissions are measured as the productive land area that is required to sequester these emissions. This indicates the amount of biological capacity required to offset emissions from fossil fuel combustion.

Indeed, the climate issue arises because the planet lacks sufficient biological capacity to neutralize all the carbon dioxide emitted from fossil fuels and fulfil other needs. Climate change, deforestation, overgrazing, unregulated fishing, food insecurity, and the rapid loss of species all are part of a complex problem.

## THE INTERNATIONAL MARITIME ORGANIZATION (IMO) AND SUSTAINABILITY GOALS

Stakeholders of the International Maritime Organization (IMO) have been increasingly working together in recent years to tackle the sustainability challenge. IMO remains committed to combating global climate change by supporting the United Nations' Sustainable Development Goal 13, which focuses on taking urgent action to address climate change and its impacts. In 2018, IMO adopted its first strategy for reducing greenhouse gas emissions from vessels. As part of this initiative, IMO reaffirmed its commitment to decreasing greenhouse gas emissions from international maritime transport as swiftly as possible. In October 2018, it also approved a monitoring program to track progress towards its targets. In July 2023, IMO adopted the "IMO 2023 Strategy" for reducing greenhouse gas emissions from vessels, as part of the established monitoring actions program.

The IMO greenhouse gas emissions strategy establishes a framework for member states, outlining their vision for the future of international maritime transport and their targets for reducing greenhouse gas emissions. The strategy incorporates additional medium- and long-term measures, along with potential

timelines and their impact on states. It also identifies barriers and supporting measures, such as capacity building, technical cooperation, and research and development (R&D). The IMO Greenhouse Gas Strategy outlines a target to decrease the carbon intensity of international shipping by a minimum of 40% on average by 2030. Additionally, the Strategy sets a new level of ambition for the adoption of zero or near-zero greenhouse gas emission technologies in the energy utilized by international shipping by the same year.

Renewable energy sources are characterized as "energy sources that can be replenished naturally and are readily available the next day." Their most significant attribute is their capacity to diminish environmental harm by lowering carbon dioxide emissions. Being domestic resources, they help reduce reliance on foreign energy and foster employment growth, gain widespread and strong public support. They are also sustainable because they are produced without relying on fossil fuels. This approach helps preserve energy resources like natural gas, coal, and oil, preventing their depletion while promoting the use of renewable fuels that are less harmful to the environment. In maritime transport, the importance of marine fuels with a low carbon footprint is just as significant as the efficiency of fleets in reducing greenhouse gas emissions. ISCC (International Sustainability and Carbon Certification) marine fuels represent a sustainable fuel option sourced from waste reuse, aligning with the goals of the IMO greenhouse gas strategy. ISCC is a sustainability certification program utilized to verify the sustainable production of biomass and other renewable raw materials.

As Arkas Bunker, we are committed to conserving the seas, reducing carbon emissions, and promoting sustainability. Aligned with our aim of

ensuring a more habitable world for future generations, we continue to work on our projects to assist companies in reducing carbon emissions. We are dedicated to maintaining a sustainable business model in maritime fuels as we progress on our journey. As the first

Turkish bunker company to receive the International Sustainability and Carbon Certificate (ISCC), we are actively contributing to the maritime industry and our nation by promoting various biofuels in line with our objectives. We encourage our stakeholders and solution partners

to join us in this endeavour while simultaneously reducing our operational carbon footprint.

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**\*ARKAS BUNKERING AND TRADING S.A. - GENERAL MANAGER**

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## SOCAR MARINE PLANS TO LEAD ALTERNATIVE FUEL SUPPLIES IN TURKEY



**\* ZEKİ TARAKÇI**

SOCAR is an energy company that offers integrated solutions to create economic, social and environmental benefits on a global level and continues to develop its international operations through strategic partnerships. It carries out activities related to the exploration, production and processing of oil and natural gas resources, distribution of oil, natural gas and natural gas condensates, national and international marketing of crude oil and petrochemical products and natural gas supply.

SOCAR Turkey Enerji A.Ş. (SOCAR Türkiye), a subsidiary of Azerbaijan's state-owned oil and gas company SOCAR, is one of the largest oil and natural gas companies in Türkiye. SOCAR Türkiye was established in 2008 following the privatization of Petkim

by purchasing a 51% stake from the Privatization Administration. It operates in the petrochemical, refining, natural gas trading and distribution sectors and applies the cluster model to create an integrated value chain from crude oil to the final product

As Türkiye's largest industrial holding, we are determined to be at the forefront of the transition towards sustainability in line with the United Nations Sustainable Development Goals (SDGs) while continuing our activities in many sectors, particularly petrochemicals, refining, natural gas, trade, transmission and distribution. At the same time, we attach great importance to the social, economic and environmental impacts arising from our operations, the expectations of our stakeholders and the management of SDGs.

We continue to create value for people, society and the environment by using the latest technologies so that we can contribute positively to create a better society for today and future generations.

### OUR NET ZERO JOURNEY

As SOCAR Türkiye, we take climate action seriously and are committed to decarbonizing our business at every level. In this context, we ensure the transition to net zero by investing in new technologies. As we move towards net zero by 2050, we see an opportunity to increase demand for innovative, low-impact products and solutions that help mitigate and adapt to the effects of climate change.

### SOCAR MARINE

SOCAR Marine, which started its operations in 2013 under SOCAR Ticaret, in addition to contributing to the development of the maritime sector with its wide customer portfolio ranging from international shipping companies to domestic ship-owners, its high level of experience, its seafaring staff, its structure that responds quickly to needs, and its superior product and service approach. SOCAR Marine has a very strong position in Turkish market with a total storage capacity of 125.000 cubic meters and 12 barges to serve all coastal lines of Türkiye.

Our service approach focuses on meeting the needs of our customers in the best way possible. We take the presence of SOCAR MARINE brand to higher levels in international arena each passing day by current physical supplies of fuel throughout Black Sea, Marmara, Aegean and Mediterranean regions of Turkey, as well as the fuel supply at all international ports from Gibraltar to Singapore and from Rotterdam to South Africa. To align with the greater group strategy SOCAR Marine targets to add new products to its product range in the next 3 years, aims to quickly respond to the search for alternative fuels in the Maritime business, with the integration of the Oil Refinery STAR, Petrochemical Refinery PETKIM.

PETKIM, a giant production power of strategic importance for the Turkish economy and industry, produces many high value-added raw materials such

as ethylene, benzene, orthoxylene, paraxylene as well as PETKIM also handles naphtha, ammonium and methanol which may also provide input to Maritime Sector. PETKIM also holds the ISCC Plus (International Sustainability Carbon Certification) in 2022, which guarantees the transparent traceability of sustainable raw materials and the products produced with these raw materials throughout the supply chain. With circular and bio-circular products have a low carbon footprint, we assist our customers in achieving their Sustainability Goals and support circular economy.

Under the scope of the ISCC PLUS certification, the processing of naphtha derivatives obtained from used cooking oils or plastic waste using the mass balance methodology guarantees the production of circular and bio-circular

versions of our Ethylene, Propylene, LDPE, PP, ACN, Benzene, C5, and Xylene products. STAR Refinery on the other hand has already started to blend biodiesel produced from domestic agricultural products and/or vegetable oils since 2023.

SOCAR Marine supports to provide sustainable solutions to our customers and move towards a carbon-neutral world. SOCAR Marine is preparing itself to use of products and practices that contribute to the reduction of greenhouse gas emissions. To achieve our goals, at first step SOCAR Marine will obtain necessary internationally recognised certifications such as The International Sustainability and Carbon Certification (ISCC). Through international Certification and local initiative, we will contribute to environmentally, socially and economically sustainable production.

In the upcoming period of time there will be major changes due to the 2025 Mediterranean ECA and the initiatives related to lowering ship emissions.

Therefore, state institutions and organizations as well as private sector participants should collaborate closely. We began collaborating with our associations and our chamber of shipping in this respect.

We intend to finish the infrastructure—both legal and infrastructural requirements—for fuels that can be sold as alternative fuels. Increasing and maintaining our industry's market share and service quality in the international market will be our top priority as ship bunker companies in Turkey.

**\*SOCAR / MARINE SALES DIRECTOR**

# ADAPTING TO INNOVATIONS REQUIRES PRECISION AND FORESIGHT



**\* UFUK ERİNÇ**

The upcoming changes in shipping and the Mediterranean indeed point to a significant shift in the outlook of the industry.

As fuel costs rise and environmental regulations tighten, shipping companies face the challenge of adapting to a new business paradigm. And this adapting requires sensitivity and foresight.

Fuel is one of the most important expense items for shipping companies, and it is preparing for a future that is both more expensive and requires as much care as a chemical tanker operation.

We are now entering an era when you need to put back what you consume. Therefore, we must better know this commodity, one drop of which is more important than in previous years,

understand its market and manage to use it efficiently.

With the Mediterranean set to become a Sulphur Emission Control Area (SECA) in 2025, ships operating in the region will need to comply with stricter fuel rules, likely leading to increased costs and operational complexities.

This change highlights the importance of market awareness, strategic planning and effective resource use in the changing shipping environment. Additionally, the introduction of carbon taxes starting in 2024 further underlines the industry's commitment to reducing greenhouse gas emissions and mitigating their environmental impacts.

Therefore, shipping companies must not only combat rising fuel costs but also emphasize the need for sustainable

practices and innovative solutions by taking into account the costs associated with carbon emissions.

In this dynamic environment, every drop of fuel becomes increasingly valuable, requiring a holistic approach to fuel management and consumption. Shipping companies can position themselves for success in this time of operational challenges and regulatory frameworks in the Mediterranean and beyond by following market trends, leveraging advanced technologies and prioritizing sustainability initiatives.

On the eve of these changes, Unerco has started to introduce its strategies aligned with the increasing global push for the adoption of biofuels and alternative fuels, zero-carbon shipping and sustainable practices.

Thus, by offering environmentally friendly fuel options, we not only want to contribute to the reduction of greenhouse

gas emissions, but also position Unerco as a leader in the transition to a more environmentally friendly shipping industry. There are several benefits to incorporating biofuels and alternative fuels into your service portfolio.

First of all, these fuels typically have a lower carbon footprint compared to traditional fossil fuels, helping to reduce the environmental impact of shipping.

Also, by diversifying fuels, we aim to offer shipping companies more options to meet legal requirements and sustainability targets. To effectively support the adoption of zero-carbon fuels, it is crucial to invest in infrastructure and partnerships that enable production, distribution and effective use these fuels.

Collaborating with biofuel producers, technology developers and regulatory authorities will help facilitate the integration of alternative fuels into the

shipping supply chain. Additionally, informing our customers about the benefits and availability of biofuels and alternative fuels is crucial to facilitate adoption. Emphasizing the environmental benefits, regulatory compliance benefits and long-term cost savings associated with these fuels will encourage shipping companies to switch to more sustainable fuel alternatives.

Overall, Unerco, by embracing biofuels and alternative fuels, is not only contributing to the decarbonisation of the shipping industry, but also positioning itself as a forward-thinking and environmentally responsible service provider in the evolving market environment. We are all aware and at the service of the necessity and awareness of change.

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**\* UNERCO - CEO**

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## FULL SPEED AHEAD



**\* MUSTAFA MUHTAROĞLU**

The Turkish bunker industry has always been a success story. The business literally started from zero in the 1980s. It is now the dominant supply hub in the Eastern Mediterranean, with volume exceeding 200,000 tonnes per month. Key to this journey, from the beginning, was the determination of all stakeholders in the Turkish bunker industry to build a world leading sector, founded on operational flexibility, fuel reliability and professional integrity.

Of course, in the last four decades we have had important turning points but main concern has always been the professionalism of the people in the industry, and in this regard, the Turkish bunker market has always been driven by reliable, reputable, honest and

hard-working professionals, dedicated to building long-term relationships with customers based on trust and mutual respect.

We have been a unique body in the area because while competing in the market we have managed to come together under trade associations, the Turkish Chamber of Maritime, other national and international governmental bodies to work together to create a better market. It is safe to say that today, most people active in shipping and bunkering mention the Turkish industry as one of the best in the world. Apart from our almost impeccable track record of bunker deliveries, day and night, 365 days per year, Turkey has also become a preferred conference destination for

the global bunker industry.

Starting with the first ISTANBUL BUNKER CONFERENCE in 2002, the Turkish bunker industry has been proud to host many conferences which promote professional education, leading edge business analysis, high level discussion of the main developments and challenges facing the industry - all within the setting of the world famous hospitality that can only be found in Istanbul.

Throughout this process, all conferences and events have benefitted from the same level of constructive cooperation between the Turkish bunker association and government ministries. The pinnacle of this was achieved in 2019, when Turkey hosted the IBIA annual convention, at the Çırağan Palace in Istanbul. This pre-pandemic event is remembered by most delegates as the leading international event staged by IBIA, combining the best of organisation, content and entertainment for attendees from all corners of the world.

Three key words define the Turkish bunker industry - WE ARE TOGETHER. We emphasise this solidarity through our total commitment to two key values. TRUST and COOPERATION. In fact, TRUST and COOPERATION were the central themes of the speech by Mrs Yeşim Muhtaroglu, who was Chairman of the Association during İstanbul Bunker Conference in 2011.

As Yeşim explained to the audience in 2011, it is this TRUST and COOPERATION which is at the heart of making the Turkish bunker industry a world leader in terms of reliability and professionalism. This is clearly seen in the fact that Istanbul and other Turkish supply ports and locations constantly achieve the utmost customer satisfaction. The single most important

turning point was 2020, with the switch to VLSFO 0.5% fuel oils.

It was a difficult task for our market as local refineries were not going to produce sufficient low sulphur fuel to meet the new international specifications. Up to the 2020 shift, the market had grown by combining the support of locally available products alongside imported material. While the majority of volume was imported companies like ENERGY PETROL used to source from TÜPRAŞ (Turkish Petroleum Refineries) only, so this was a considerable challenge to adapt and change to meet market demand.

We successfully managed to navigate these challenges and actually started supplying VLSFO 0.5% in September 2019, fully 4 months before the official start date for the new fuels.

In the last 4 years, ENERGY PETROL has successfully completed over 7,500 deliveries of VLSFO 0.5% without a single quality or quantity issue, which represents a significant proportion of the more than 35,000 deliveries we have made since we started in 1997.

Now we have another task - decarbonisation. This represents an even more monumental challenge to overcome - but we are fully-confident that ENERGY PETROL will succeed in this like we did with the 2020 shift to VLSFO.

We would like to share important news on this matter, our oil storage ALTINTEL in Gebze, Turkey will soon become a carbon free terminal, thanks to the visionary commitment of the facility's owning family who intend to develop this state of the art terminal into a leading hub for the carbon free fuels and petrochemicals that we need as we shift to meet ever lower emissions targets. Recently, at the

prestigious dinner given by Denizbank (the financial institution which plays the largest role in supporting the Turkish shipping industry), the Chairman of the Turkish Chamber of Maritime delivered a keynote speech in which he made the important observation that even if we don't know exactly what fuel we will burn, most ship-owners are diligently working on it and the Turkish bunker sector will continue to be the best partners for shipping as we move forward. His emphasis was the working together, the bunker industry and the ship-owner can rely on moving FULL SPEED AHEAD. It is a fact that we have always been among the leading supporters of the Turkish shipping community - and we will continue to be that as it grows to a total fleet of over 50 million DWT. We will always be there to provide good service, quality product, industry knowledge and trade finance in the good and bad days, 24 hrs per day, 365 days per year. As we mentioned earlier, WE ARE TOGETHER and will achieve FULL SPEED AHEAD with TRUST and COOPERATION.

The Turkish bunker industry is also part of the international bunker world and we have always had a strong presence in IBIA, since the starting days of that organisation. The CEO of ENERGY PETROL, Mustafa Muhtaroglu served many years in consecutive terms as a Board Member of IBIA, and played a key part in many of the developments that have shaped the organisation in the last 30 years.

The Turkish presence in IBIA has now been passed over to Mr Ufuk Erinç and we look forward to the positive role he will play. We can confidently say that from its start in the 1980s until today, we have built an industry that is robust, reliable and ready for the future.

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**\* ENERGY PETROL - OWNER**



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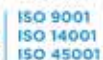
Cruise Ship Supply



Underwater Repairs & Services



Navy & Naval Ship Supply



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# The Turkish Merchant Fleet

## WORLD AND TURKISH MERCHANT FLEET

2024 (January)  
WORLD FLEET  
2.235.096.000 DWT

The Turkish Merchant Fleet  
is on the 12 th place in the World List

## TURKISH FLAG FLEET

6.0 million DWT (1.000 GT and more)

## FOREIGN FLAG FLEET

41,9 million DWT (1000 GT and more)

## TURKISH SHIPOWNERS CONTROL TOTAL OF

47,9 million DWT

## BY COUNTRY OF CONTROL AS OF JANUARY 2024

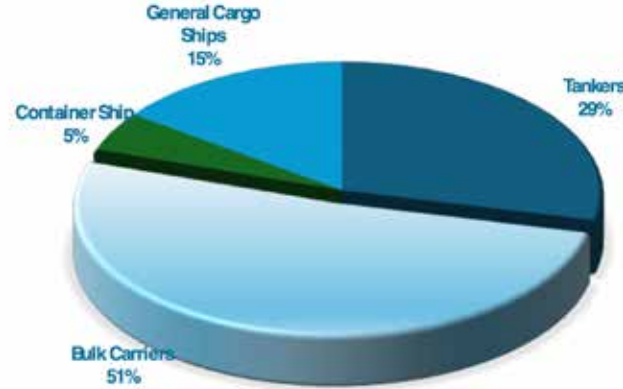
Turkish Shipowners control total 47,9 million DWT fleet. Turkish Flag Fleet is 6,0 million DWT and Foreign Flagged fleet is 41,9 million DWT. Turkish Merchant Fleet is on the 12th in the world list.

### Total Fleet of the 30 Countries by National and Foreign Flags (01 January 2024) (1000 GT and Over)

Country of Control (DWT-Rank 2024)	National flag		Foreign flag		Total fleet controlled		
	No	1000 DWT	No	1000 DWT	No	1000 DWT	
1	Greece	585	54.017	4.483	356.300	5.068	410.318
2	China, PR of	5.466	124.069	3.577	268.806	9.043	392.875
3	Japan	906	39.034	3.415	216.889	4.321	255.923
4	Korea, Rep. of	759	19.077	898	81.185	1.657	100.262
5	Singapore	694	24.911	912	58.991	1.606	83.901
6	Norway	668	15.948	1.017	64.955	1.685	80.903
7	Germany	136	7.346	2.044	67.188	2.180	74.534
8	Taiwan	125	5.725	894	56.617	1.019	62.342
9	Hong Kong (SAR)	385	22.068	769	34.363	1.154	56.431
10	Italy	369	6.343	854	48.993	1.223	55.335
11	US	214	6.088	932	49.166	1.146	55.253
12	<b>Türkiye</b>	<b>348</b>	<b>6.026</b>	<b>1.614</b>	<b>41.950</b>	<b>1.962</b>	<b>47.976</b>
13	UAE	50	384	900	43.125	950	43.509
14	UK	154	6.310	648	34.828	802	41.138
15	Denmark	353	21.114	390	19.548	743	40.663
16	India	696	15.482	319	23.786	1.015	39.268
17	Canada	142	1.735	374	30.797	516	32.532
18	Indonesia	2.196	25.174	130	3.901	2.326	29.075
19	France	112	3.820	306	18.546	418	22.366
20	Russia	1.288	9.340	277	11.235	1.565	20.575
21	Belgium	64	7.251	113	13.150	177	20.401
22	Iran	211	18.265	7	332	218	18.597
23	Saudi Arabia	113	13.929	31	2.345	144	16.274
24	Viet Nam	842	11.050	190	5.171	1.032	16.221
25	Marshall Islands	28	1.630	165	13.590	193	15.220
26	Malaysia	199	5.221	155	9.676	354	14.897
27	Netherlands	521	4.610	335	7.240	856	11.850
28	Switzerland	14	836	177	10.162	191	10.998
29	Cyprus	49	1.121	175	8.033	224	9.155
30	Oman	4	6	66	7.643	70	7.648
<b>Total 30 Countries</b>		<b>17.691</b>	<b>477.930</b>	<b>1.608.510</b>	<b>43.858</b>	<b>2.086.440</b>	<b>77,1</b>
<b>Other</b>		<b>2.791</b>	<b>38.303</b>	<b>80.252</b>	<b>5.456</b>	<b>118.555</b>	<b>67,7</b>
<b>Subtotal</b>		<b>20.482</b>	<b>516.234</b>	<b>1.688.762</b>	<b>49.314</b>	<b>2.204.996</b>	<b>76,6</b>
<b>Unknown</b>					<b>943</b>	<b>30.100</b>	
<b>World Total</b>					<b>50.257</b>	<b>2.235.096</b>	

The biggest fleets with open registry flags in national and foreign flag vessels Greece is on the 1st row. China is on the 2nd and Japan is on the 3rd row. whereas Türkiye is on the 12th row.

### DISTRIBUTION OF TURKISH OWNER SHIPS BY TYPE



Distribution of the fleet by DWT (47,9 Million); 51 % bulk carriers, 29 % tankers, 15 % general cargo ships and 5 % container types of ships.

### TURKISH MERCHANT FLEET UNDER THE CONTROL OF THE TURKISH SHIPOWNERS



#### 2024

Turkish flag fleet is equal to 6.0 million DWT  
 Foreign flag fleet is equal to 41,9 million DWT  
 Turkish shipowners control total of 47,9 million DWT

### FOREIGN TRADE TRANSPORTATION BY MODES

Türkiye is in the Mediterranean Basin and thus on the focus of the transportation from Europe to the Atlantic, Arab Peninsula, Middle East and Far East with its hinterland at the crossroads in the East-West. North-South lines, Besides, this geographical advantage presents a situation in which sea transportation will be effective in all the areas within the country with the coastline of 4500 sea miles (8333 km).

#### Turkish Foreign Trade Transportation by Modes (%)

Year	Sea	Road	Pipeline and Other	Rail	Air
2014	86.2	11.2	1.7	0.4	0.5
2015	87.7	10.7	0.7	0.5	0.4
2016	88.0	10.8	0.4	0.5	0.3
2017	88.5	10.3	0.5	0.4	0.3
2018	88.7	10.3	0.2	0.4	0.4
2019	88.6	10.3	0.3	0.4	0.4
2020	88.8	9.4	1.1	0.6	0.2
2021	87.5	10.7	0.9	0.7	0.2
2022	86.8	11.5	0.6	0.7	0.6
2023	87.5	11.3	0.3	0.5	0.4

Source: TUIK Turkish Statistical Institute

87.5 % of the Türkiye's foreign trade is being realised by maritime transportation. The progress of transportation between the years of 2014-2023 is shown in the table below by the modes of transportation.

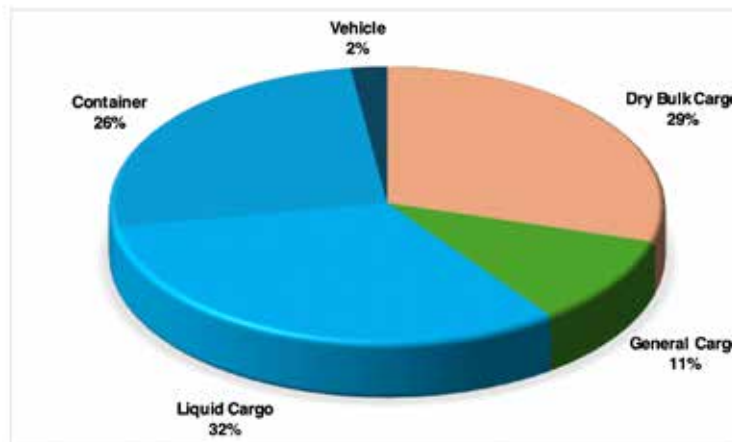


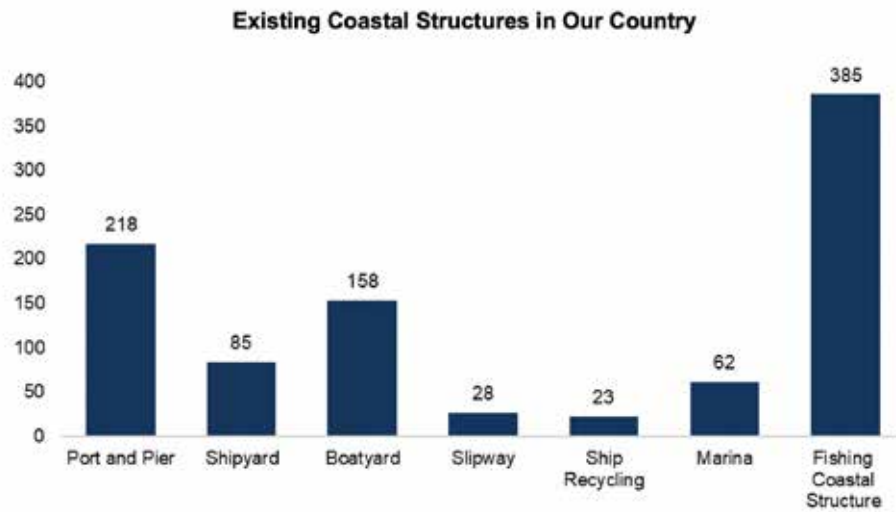
## TURKISH PORT

Explanation	Dry Bulk Cargo (Million Tons)	Liquid Bulk Cargo (Million Tons)	Container (Million TEU)	Vehicle (Million Pieces)
2023 Cargo Handling	208.6	167,8	12.6	2.8
Capasite	423.7	354.6	25.9	6.8
Capacity Performance	<b>49%</b>	<b>47%</b>	<b>49%</b>	<b>41%</b>
Planned Port Capacities	14.4	81	18.8	0
Total Capacity Including Planned	438.1	435.6	44.7	6.8

### Current Status of Turkish Ports

**Total of about 521 million ton cargoes has been handled 2023 at Turkish Ports. Cargo Handling Figures According To Year 2023 (%)**





Source : Source: Ministry of Transport and Infrastructure

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

The number and Gross Tonnage of incoming ships to the Turkish ports between the years 2019-2023.

Year	Flag	No. of ship	Gross Tonnage
2019	Turkish Flag	20.991	121.969.581
	Foreign Flag	34.311	674.296.984
	<b>Total</b>	<b>55.302</b>	<b>796.266.565</b>
2020	Turkish Flag	15.222	117.340.754
	Foreign Flag	33.599	673.540.896
	<b>Total</b>	<b>48.821</b>	<b>790.881.650</b>
2021	Turkish Flag	15.120	123.686.234
	Foreign Flag	36.079	705.931.868
	<b>Total</b>	<b>51.199</b>	<b>829.618.101</b>
2022	Turkish Flag	17.921	127.451.636
	Foreign Flag	40.131	745.877.992
	<b>Total</b>	<b>58.052</b>	<b>873.329.628</b>
2023	Turkish Flag	19.277	127.995.057
	Foreign Flag	40.918	766.064.886
	<b>Total</b>	<b>60.195</b>	<b>894.059.943</b>

Source: General Directorate of Maritime Affairs -Department of Maritime Trade Development

## DEVELOPMENTS IN INTERNATIONAL SEA TRANSPORTATION

In 2023 export shipments decreased to 135 million tons, import shipments increased to 256 million tons when compared with the previous year. The share of Turkish flag vessels transporting foreign trade cargoes have been realized as 7 % on the average.

The share of the Turkish flag vessels transporting foreign trade cargoes between 2014-2023 have been realized as 9% on the average.

### Development of the Seaborne Trade (2014-2023) Tons

Year	Export	Import	Seaborn Trade Total	Annual Change %	Turkish Flag %	Foreign Flag %
2014	88.544.792	194.771.428	283.316.220	2.1%	12	88
2015	92.152.622	208.326.308	300.478.930	5.7%	12	88
2016	94.805.120	215.132.519	309.937.639	3.1%	12	88
2017	113.692.068	233.656.024	347.348.092	12.1%	11	89
2018	110.424.635	218.544.820	328.969.455	-5.3%	11	89
2019	131.676.578	221.404.812	353.081.390	7.3%	8	92
2020	138.902.823	226.539.473	365.442.296	3.5%	8	92
2021	153.763.658	232.633.060	386.396.718	5.7%	8	92
2022	150.172.902	243.917.119	394.090.021	2.0%	7	93
2023	135.510.681	256.206.627	391.717.308	-0.6%	7	93

Source: General Directorate of Maritime Affairs -Department of Maritime Trade Development

### Seaborne Export/Import and Transit Handling of Türkiye and OECD Countries (Tons)

OECD COUNTRIES	Export	Import	Seaborn Trade	Transit Handling	Cargo Handling	%
Italy	14.254.385	8.585.666	22.840.051	21.793.592	44.633.643	25%
United States of America	11.906.537	15.622.787	27.529.324	837.920	28.367.244	16%
Greece	7.322.651	10.816.563	18.139.214	4.100.086	22.239.300	12%
Israel	9.580.352	5.389.092	14.969.444	1.636.276	16.605.720	9%
Spain	7.939.720	3.138.640	11.078.360	2.203.934	13.282.294	7%
Belgium	4.102.665	4.269.234	8.371.899	788.874	9.160.773	5%
Netherlands	3.014.734	3.297.701	6.312.435	691.994	7.004.429	4%
France	2.879.373	3.127.009	6.006.382	431.722	6.438.104	4%
Colombia	108.325	5.330.404	5.438.729	0	5.438.729	3%
Korea, South	714.944	3.602.205	4.317.149	696.483	5.013.632	3%
Other Ülkeler	6.167.398	14.125.186	20.292.584	2.116.453	22.409.037	12%
Total	67.991.084	77.304.487	145.295.571	35.297.334	180.592.905	100%

Source: General Directorate of Maritime Affairs -Department of Maritime Trade Development

In 2023, the seaborne trade volume between Türkiye and the OECD countries was 180 million metric tons of which 145 million metric tons were import-exports while 35 million metric tons were transit cargoes.

## CONTAINER SHIPPING

### World Container Fleet by Country of Domicile

The “country of domicile” examination (including container ships of 1000 GT and over) shows that at the beginning of 2023, 25.744.000 TEU of the container capacity was not registered in the country of domicile of the owner but flagged out.

With respect to the owner countries, China shipowners control by far the largest part of the world container fleet, namely 3.8 million TEU (808 container vessels) followed by Germany 3.1 million TEU (824 container vessels) and Denmark 2.5 million TEU (357 container vessels).

**World Full Container Fleet by Country of Domicile (1000 GT and over) 2023**

TEU Rank	Country of Control	No	1000 DWT	1000 TEU	Av.Age	Foreign Flag %	TEU Annual Change %
1	China, PR of	808	44.758	3.840	11.8	78.6	0.3
2	Germany	824	38.037	3.117	14.7	83.3	-5.3
3	Denmark	357	29.635	2.560	13.8	49.5	2.8
4	Italy	440	30.171	2.482	18.2	99.9	21.2
5	Japan	351	24.642	2.197	7.9	86.3	5.0
6	Greece	438	23.635	1.952	14.8	98.1	-8.7
7	Taiwan	354	19.314	1.638	11.7	84.7	20.6
8	France	223	17.963	1.561	12.2	80.5	7.8
9	Canada	143	14.338	1.259	10.0	99.9	8.5
10	UK	187	13.234	1.103	13.6	83.0	2.8
11	Korea,Rep.of	220	10.888	962	12.5	66.2	0.8
12	Singapore	237	11.101	944	13.3	66.3	5.6
13	Norway	59	4.187	354	12.3	100.0	6.2
14	Hong Kong (SAR)	118	2.645	205	11.7	34.3	41.2
15	US	83	2.651	195	17.0	66.7	-16.4
16	UAE	95	2.542	192	19.7	97.4	12.4
17	Indonesia	225	2.606	179	17.9	24.4	-5.5
18	Türkiye	93	2.030	152	18.3	63.7	2.1
19	Iran	29	1.744	146	13.8	4.5	4.6
20	Israel	36	1.542	124	11.8	89.3	-2.3
21	Thailand	55	1.176	93	17.3	59.6	28.9
22	Netherlands	45	566	46	16.0	49.4	-0.1
23	Viet Nam	49	595	43	19.0	7.1	12.9
24	Bermuda	4	467	40	6.5	100.0	
25	Belgium	13	465	36	12.2	88.9	-15.9
26	Malaysia	37	460	33	20.5	2.7	6.1
27	Russia	28	370	29	20.9	59.1	4.9
28	Philippines	41	254	19	26.8	2.9	-8.3
29	India	7	178	13	16.2	-	-
30	Egypt	13	161	12	28.3	27.8	-0.4
<b>Total 30 Countries</b>		<b>5.612</b>	<b>302.355</b>	<b>25.527</b>	<b>13.9</b>	<b>80.0</b>	<b>4.2</b>
Others		121	1.427	107	22.2	60.9	-9.4
Unknown		43	1.399	109	20.0		
<b>WORLD TOTAL</b>		<b>5.776</b>	<b>305.181</b>	<b>25.744</b>	<b>14.2</b>		<b>4,3</b>

TEU based container transportations in 2023 realized as follows in their respective subgroups; exports became 4.9 million TEU, imports 4.8 million TEU, cabotage handling 759.611 TEU and transit handling 2 million TEU.

## Container Handling 2014-2023 (TEU)

Years	Export	Import	Seaborn Trade	Cabotage Handling	Transit Handling	Total Handling	Change %
2014	3.488.008	3.581.811	7.069.819	527.064	754.238	8.351.121	6%
2015	3.394.508	3.454.345	6.848.854	606.064	691.481	8.146.399	-2%
2016	3.543.804	3.607.086	7.150.890	738.312	872.772	8.761.974	8%
2017	3.866.874	3.975.205	7.842.079	935.521	1.232.937	10.010.537	14%
2018	4.160.124	4.259.029	8.419.153	935.661	1.489.184	10.843.998	8%
2019	4.594.647	4.540.201	9.134.849	753.267	1.703.722	11.591.838	7%
2020	4.618.225	4.480.472	9.098.697	731.352	1.796.601	11.626.650	0%
2021	4.677.414	4.744.227	9.421.640	831.987	2.337.843	12.591.470	8%
2022	4.694.918	4.814.757	9.509.675	820.949	2.035.758	12.366.382	-2%
2023	4.910.525	4.830.826	9.741.352	759.611	2.055.439	12.556.402	2%

Source: General Directorate for Maritime Affairs -Department of Merchant Trade Development

Countries	Export	Import	Seaborn Trade	Transit Handling	Total Handling
Greece	408.784	752.283	1.161.066	144.167	1.305.233
Egypt	566.712	502.042	1.068.754	93.155	1.161.909
Israel	326.815	583.106	909.921	64.025	973.945
China	326.386	200.056	526.442	257.332	783.774
Russian Federation	225.605	238.763	464.368	235.477	699.845
Saudi Arabia	329.805	154.077	483.882	103.706	587.589
Italy	303.106	245.139	548.245	35.820	584.065
Georgia	87.892	225.926	313.818	195.308	509.126
Spain	277.673	134.724	412.397	55.571	467.968
Morocco	306.900	100.621	407.521	24.194	431.715
United States of America	175.443	175.629	351.072	69.835	420.907
Belgium	221.483	151.668	373.152	42.655	415.807
United Kingdom	241.975	91.485	333.460	13.219	346.679
Romania	109.262	49.715	158.977	162.212	321.189
Lebanon	54.967	235.404	290.371	11.292	301.662
Libya	109.515	159.261	268.776	16.523	285.299
Singapore	104.330	87.877	192.207	79.650	271.857
Korea, South	79.412	121.880	201.292	53.010	254.302
Malta	79.591	165.731	245.322	2.385	247.707
Bulgaria	49.438	54.444	103.882	105.828	209.709
Other Countries	525.432	400.997	926.429	290.077	1.216.506
<b>Total</b>	<b>4.910.525</b>	<b>4.830.826</b>	<b>9.741.352</b>	<b>2.055.439</b>	<b>11.796.791</b>

Source: General Directorate for Maritime Affairs -Department of Merchant Trade



As of 2023, the countries which Türkiye performed foreign trade with / conducted transit container transportation are as follows, Greece, Egypt and Israel.

## TURKISH STRAITS

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 İstanbul 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.

The number of vessels that passed through the Turkish Straits between the years 2014-2023 are shown in Table below. In the year 2023 39.000 ships in total have passed through the İstanbul Strait, 44.892 ships in total have passed through the Çanakkale Strait.

### Ships Passing Through the Turkish Straits (2014-2023)

Years	İSTANBUL			ÇANAKKALE		
	Number of Vessel	GT	GT Change %	Number of Vessel	GT	GT Change %
2014	45.529	582.468.334	6,0%	43.582	761.631.756	3,0%
2015	43.544	565.216.784	-4,0%	43.230	777.989.382	3,0%
2016	42.553	565.282.287	0,0%	44.035	772.922.682	-1,0%
2017	42.978	599.324.748	7,0%	44.615	823.460.636	8,0%
2018	41.103	613.088.166	3,0%	43.999	849.140.218	4,0%
2019	41.112	638.892.062	0,0%	43.759	872.312.222	-0,5%
2020	38.404	619.758.776	-6,6%	42.036	858.844.972	-3,9%
2021	38.551	631.920.375	0,4%	43.342	898.473.519	3,1%
2022	35.146	541.444.690	-8,8%	42.340	871.621.677	-2,3%
2023	39.000	621.638.378	14,8%	44.892	941.519.970	8%

Source: General Directorate for Maritime Affairs -Department of Merchant Trade Development

A significant part of the ships passing through the Turkish Straits carries toxic, hazardous and explosive substances (such as crude oil, ammonia, liquefied gas, radioactive substances, hazardous wastes). Especially in the 1990s. parallel to the increase in the oil flow to the ports in the Black Sea the number of ships carrying dangerous goods and oil from the Turkish Straits also increased.

### Dangerous Passing Through Turkish Straits

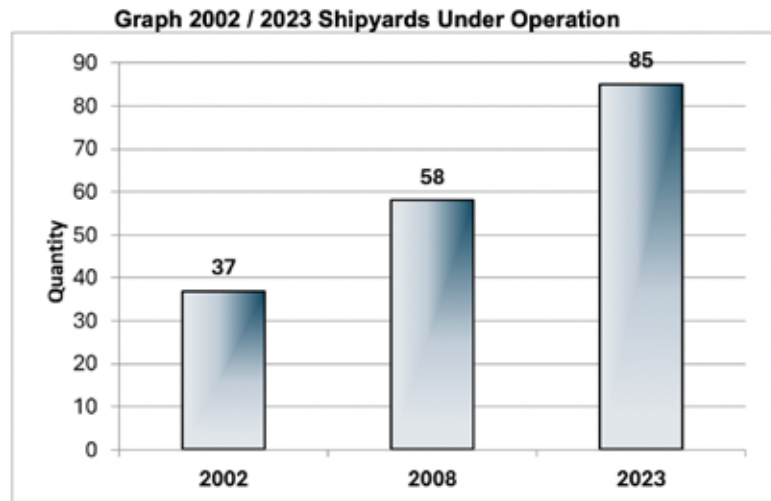
Years	İstanbul		Çanakkale	
	Total Tankers	Oil and Dangerous Cargoes (tons)	Total Tankers	Oil and Dangerous Cargoes (tons)
2014	8.745	133.961.000	9.250	152.286.000
2015	8.633	135.952.000	9.524	155.531.000
2016	8.703	136.100.000	9.481	156.203.000
2017	8.832	146.943.000	9.478	166.729.000
2018	8.587	147.375.459	9.251	164.583.997
2019	8.957	159.499.000	9.843	171.685.000
2020	8.435	139.244.513	9.372	157.193.034
2021	8.248	147.222.005	9.208	167.993.772
2022	8.653	149.904.132	9.904	166.774.727
2023	9.287	164.469.822	10.303	185.863.508

Source: General Directorate for Maritime Affairs -Department of Merchant Trade Development

## SHIPBUILDING INDUSTRY

### General Outlook of the Turkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, the under operation raised up to 85 as of March 2024 while it was only 37 in 2002. The quantity of shipyards under construction are 13 areas that are defined as shipyard investment areas of the same date mentioned above. The Covid-19 pandemic, within the the Global Economic Crisis, affected the Shipbuilding Sector adversely as well as many other sectors. The decrease in the order books caused a downfall both in employment and new investments, so most of the shipyards cancelled or postponed their modernization projects.



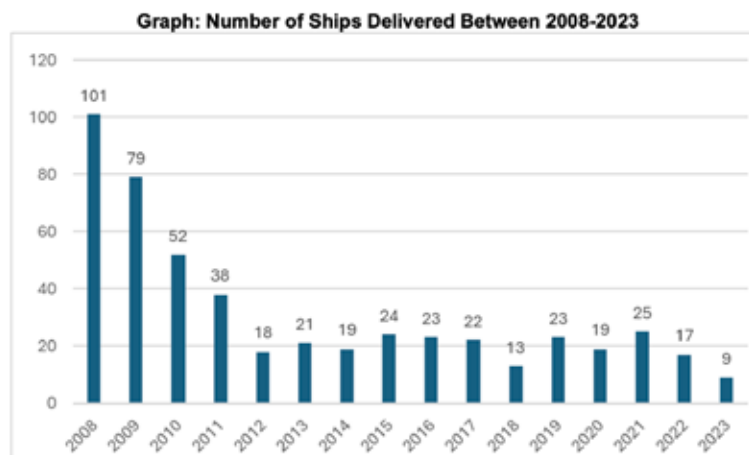
Source: Ministry of Transport and Infrastructure 03/2024

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.

In 2022 and 2023, 26 ships DWT of 83.568 tons have been delivered.

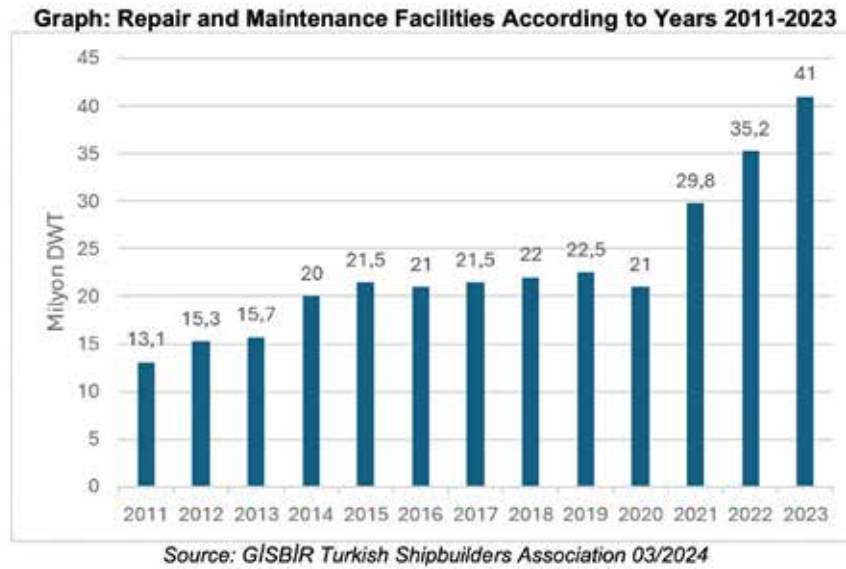
Some of the operative shipyards in Türkiye continue the modernization and extension operations but on the other hand, due to the global economic crisis, some of them suspend or cancel their modernization or extension projects because of the sanctions applied by the banks on the shipyards.



Source: Clarkson Resarch Services 03/2024

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

By the end of 2012, orders in our yards were decreased to 0,5 million DWT. Due to the lack of new orders, the shipyards are now mostly concerned, with repair and maintenance facilities. In 2013, in Turkish shipyards 15.755.206 DWT of repair and maintenance had been done. As of 2018, it was approximate 22.000.000 DWT and in 2021 29.800.000 DWT. In 2023, it raised up to 41.000.000 DWT.



## 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 the combination of the sectors in yards dealing 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 does not need very big investments but has a big accretion value. Türkiye; with its beautiful coasts, cultural and historical resources, has a great market potential not only for yachts but also 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.

To 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 the 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.

Türkiye has shown a steady rise, especially in the construction of super yachts of 24 meters and above, since 2007, and has risen to third place in the world when the evaluation was made on a length basis. According to January 2021 data, while it maintained its third place on a length basis with 3,497 m, it ranked 4th with 73,011 GT in 2023, when evaluation was started on the basis of tonnage instead of length.

**Table: Top Builder of Superyacht Projects on Order in 2023**

Rank	Country	Total GT	Number Of Projects	Average GT
1	Italy	220,068	600	367
2	Germany	86,903	21	4,138
3	Netherlands	86,336	80	1,080
4	Türkiye	73,011	132	553

*Source: Boat International (2024 Global Order Book)*

## SHIP RECYCLING INDUSTRY

Aliaga region, located in the city of İzmir, is in the leading position for ship breaking and recycling activities with 23 operative facilities. Ship Recycling Industry is a part of maritime sector that finds itself between the withdrawal of ships which have completed their economic lives and the replacement of them with the ones based on new technologies, environmentally friendly, high operating efficient, reducing the risks of marine operations.

When scrap steel was recovered it's estimated that,

- Energy saving ratio is 74%, raw material resources preserved by 90%
- 40% less water consumption
- 76% less sewage pollution
- 86% less air pollution
- 97% less mine residue

observed.

Generally a ship's useful economic life period ranges between 20-35 years.

The main advantages of Türkiye's ship recycling industry which has a prestigious place in World ranking can be summarize as follows:

- Qualified labour force and closeness to the Europe Market
- Within the Mediterranean basin Türkiye is the only country with ship recycling industry
- Türkiye is the only OECD Member country which has ship recycling industry
- There is a demand in the country for the goods obtained by recycling
- Entrepreneur being of Turkish businessman and skilled workers
- Advantages by the Basel Agreement as an OECD member country
- Position in EU Ship Recyclers' List with the most number of facilities

**Graph Türkiye's Ship Recycling Values by the Years**



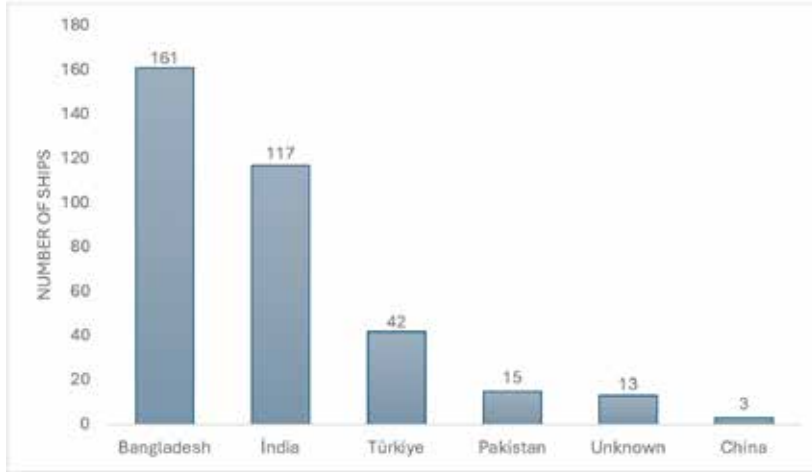
*Source: Ministry of Transport and Infrastructure 03/2024*

Ship Recycling Industry makes positive impact to the dynamics within the maritime sector. By balancing the fleet tonnage it also effects the freight index. Provides new orders for shipbuilding industry.

By the EU Ship Recycling Regulation (EU SRR) which has come into force on 31 December 2018, its forbidden that EU flag vessels can not be recycled in the facilities that is not in the list of “European List of Ship Recycling Facilities.” At first Türkiye entered the above mentioned list with 3 facility then it raised up to 9 in 2023.

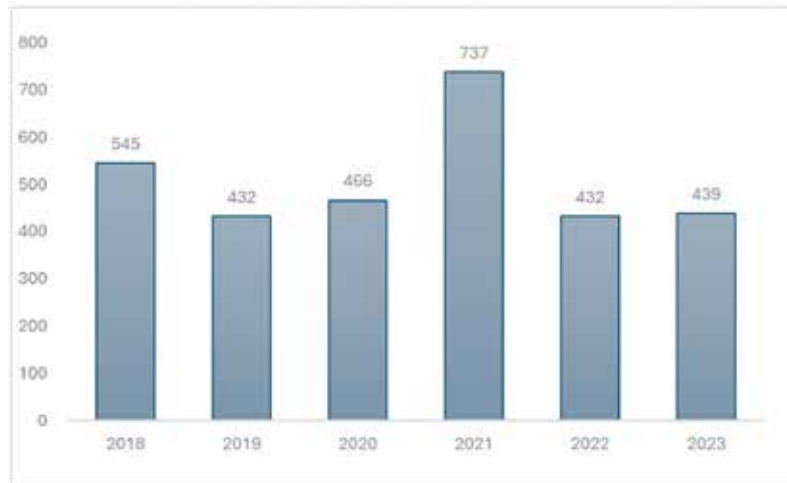
Accoardind to global data, Türkiye is in the 3th place in ranking according to quantity by the end of 2023.

**Graph Global Ship Recycling (Quantity)**



**Source: Clarksons Research Services Limited 04/2024**

**Graph Recycled Ship Numbers by Years**



**Source: Clarksons Research Services Limited 04/2024**

Like all other participants in the maritime sector, ship recycling has also effected from the Covid-19 global pandemic. In parallel to hygine and social distance precautions, employee numbers in ship recycling industry reduced and it's estimated that the related sectors employees declined by half when compared to the pre-pandemic period.

In the first three months of the year 26 ships had been recycled. During this period scrap material needs of the iron-steel factories among the region have been supplied. When its compared to the same preiod of the previous year 202.000 tons of decrease was observed. By the end of 2023, Türkiye's ship recycling facilities achieved to recycle 66 ships with the tonnage of 564 GT.

**Prepared by:  
Turkish Chamber of Shipping**

# TURK LOYDU IS POISED TO EXPAND ITS SERVICES GLOBALLY

With its membership in the International Association of Classification Societies (IACS), which serves more than 90% of the world's seaborne fleet with its 12 members, Türk Loydu is now poised to expand its services globally.



**PROF. DR. ORAL ERDOĞAN**

*CHAIRMAN OF THE BOARD TÜRK LOYDU FOUNDATION*

As Türk Loydu Foundation, our goals include enhancing the international presence of Türk Loydu, strengthening its sustainability and technological infrastructure, and ensuring the provision of more comprehensive and high-quality services. In line with these objectives, we aim to establish a more visible and

impactful presence in the international arena.

Among our strategic objectives are opening new offices to strengthen our presence internationally, streamlining the organizational structure of our headquarters for greater effectiveness

and efficiency, obtaining authorization from new flag states, and accelerating digital transformation to utilize technology more effectively. Additionally, we prioritize important issues such as sustainability, environmental protection, and solutions aimed at maximum efficiency. We will continue our efforts steadfastly in line with these objectives.

IACS membership has enhanced the international reputation of Türk Loydu and demonstrated its compliance with global maritime standards. This membership has provided us with the opportunity to have a greater influence in the international maritime industry. Additionally, being part of IACS has allowed us to further develop our expertise through knowledge and experience sharing among its members.

Throughout this process, the determination demonstrated by Türk Loydu was well-received by other organizations in the sector. With the leadership of our General Assembly delegates, the efforts of our classification corporation's managers and employees, and the support of our stakeholders, we have reached this important milestone. I extend my sincere thanks to everyone involved in this process.

As Türk Loydu Foundation, we will continue to strive towards expanding Türk Loydu's impact in the industry beyond IACS membership. In line with our vision of broadening our reach, we will support Türk Loydu in increasing flag state recognitions, expanding its office network, furthering advancements in defense projects, and strengthening collaborations within the sector.





CONSULATE GENERAL OF PANAMA  
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# DEFENCE INDUSTRY PROJECTS IN OUR SEAS



The Undersecretariat for Defence Industries (SSM) was founded in 1985 as the Defence Industry Development and Support Administration Office (SaGeB) under the Turkish Ministry of National Defence. There are many ongoing or completed naval projects for the defence industry under the roof of Undersecretariat for Defence Industries. Here are some of them.

## **TCG ANADOLU (Multipurpose Amphibious Ship Project)**

The Multipurpose Amphibious Assault Ship TCG ANADOLU, can transport one amphibious battalion as well as carrying the necessary combat and support vehicles to the crisis regions without the support of the main base, taking part in landing operations with the landing vehicles which it carries in its well-deck and providing the opportunity for the helicopters with unmanned aircrafts to take part in day and night operations with its flight deck.

TCG ANADOLU has a hospital including an operating room, x-ray equipment, dental treatment units, and intensive care and infection rooms with a capacity of at least 30 beds and is able to serve as a Hospital Vessel in humanitarian operations. The Multipurpose Amphibious Assault Ship has a full load display of 27,436 tons and 231 meters overall length, it is now the largest

naval platform in the inventory of Turkish Navy. Pre-acceptance of TCG ANADOLU has completed in 2023 and warranty period has still going on.

## **DİMDEĞ (Turkish Navy Fleet Replenishment Tanker)**

Turkish Navy Fleet Replenishment Tanker (DİMDEĞ), is design to rapidly refuel surface units, including helicopter fuel, with fuel and water supplies at sea. DİMDEĞ is equipped to serve within the scope of peace support operation, response to



disaster and emergency situations and humanitarian aid, as well as resupply at sea for combat elements and advanced bases.

Moreover, it will also provide support in the maintenance/repairs of manned and unmanned surface and underwater vehicles, helicopters and unmanned aerial vehicles deployed on the ship at a certain level. It is planned to be delivered to the Turkish Naval Forces Command in 2023.

## **MILGEM FIFTH SHIP (ISTIF CLASS FRIGATE) PROJECT**

In the scope of this project, the Fifth Ship of the MILGEM is being designed and built as the first national Frigate and the first ship of the "ISTIF" Class Frigates. Around





80 subcontractors work for more than 150 systems in the project. In total, the number of contracted companies reached to 220. It is aimed to increase the rate of local content of the "ISTANBUL" Frigate above 75 percent. On-board this ship, there are critical weapon and sensor systems that will be developed indigenously and included in the inventory for the first time. The first ship "ISTANBUL" is aimed to be delivered to Turkish Navy in 2023. The necessary operations for the follow-up platforms, which are the 6th, 7th and 8th Frigates of our MILGEM "ISTIF" Class Frigates are being conducted.

### NEW TYPE SUBMARINE PROJECT

Within the scope of the Project, based on the need of Turkish Naval Force, to meet Submarine Operation Concept criterion, it is aimed to construct 6 submarine with air independent propulsion system with maximum participation of Turkish industry at Gölcük Shipyard Command. These submarines will be equipped with modern command systems, due to the ability of submergence for a longer period than its



peers will give our Turkish Naval Force a great advantage in terms of Submarine Operation Concept.

Construction of the first 4 submarine has begun. At the beginning of 2022 the first submarine, at the beginning of 2027 the last submarine is planned to be delivered to Turkish Naval Force. Using the products of our local companies for the first time on submarine platform is supported in the scope of the Project, within this framework



our industry has been ensured to take part in many fields including submarine design capability.

### BARBAROS CLASS FRIGATES MID-LIFE MODERNIZATION PROJECT

In the scope of this project, it is aimed to replace the existing combat systems of BARBAROS Class Frigates, 4 units, registered in the inventory of Turkish Naval Forces with indigenously developed systems in accordance with

weapon, sensor, communication, platform and navigation systems using domestic and national sources to suit current and future naval warfare needs. T

he systems developed for the first time in Turkish history will be deployed during the modernization process. Rare nations in the world are able to complete initiatives of this project. The first submarine's renovation will be completed in 2023 and it will recommission at the start of 2024.



the requirements of the state of the art technology. This project, with modernization by domestic and national means, is a first in the world in terms of its scope. It is planned that the modernization of the first frigate will be completed and the frigate will be in service in 2023.

### PREVEZE CLASS SUBMARINE MID-LIFE MODERNIZATION PROJECT

With the help of this project, four Preveze Class Submarines in the Turkish Naval Forces' inventory will be renovated by

### FAST PATROL BOAT PROJECT

It is aimed to supply 173 Boats with the needs of Turkish Coast Guard Command and General Directorate of Security in order to support performing maritime safety, maritime security, anti-smuggling duties in strategic facilities, bases, ports and areas close to the coastlines, preventing irregular migration and carrying on search/rescue missions in areas where migration events are concentrated. With this project, it is aimed to realize more than 50%



SME share. The largest number of naval platforms will be procured on project basis and made available to the authorities in need.

Boats are designed as a V-section, monohull type with national capabilities. The production process is continuing. The first boat was commissioned in 2021. The project continues intensively with the mass production activities and their acceptance processes.

#### FAST ATTACK CRAFT PROJECT

In this project, from the design process, the first phase, until the completion of production process, domestic and national approach will be put forward with experiences gained by the projects carried out in Turkish defence industry under SSB's responsibility. In this context, the design of the Fast Attack Craft which will be equipped with effective weapons and sensors and also high speed and manoeuvrability, will be completed with our own competencies in both engineering and production. At the end of this period, the indigenous systems currently being developed and existing national systems will take part in the design, and high local content rate is aimed.

#### TANKER PROJECT

A total of 4 (four) Fuel Oil Ships with the

capability to refuel at the port, alarga, approach waters and holding points will be procured. The first ship is planned to be delivered to the Naval Forces Command in 2023.

#### LOGISTIC SUPPORT SHIP PROJECT

In scope of the Logistic Support Ship Project, two ships are being supplied in order to meet the liquid fuel (F-76 and JP-5), drinking water and food needs of the Turkish Navy combatants. Logistic Support Ships will conduct replenishment operations for both navy combatants and helicopters with their Astern Refuelling and Helicopter in Flight Refuelling Systems (HIFR). Ships also will have a capability to allow 15 tons general purpose helicopters, to land and take off day and night.

Moreover, ships have a medical station in which small scale surgeries can be performed. With fully loaded displacement of 9080 t. and 106 m. length, the first of the ships, TCG Yzb. Güngör DURMUŞ, was delivered on 08 December 2021 and the second ship, Ütğm. Arif EKMEKÇİ, is planned to be delivered to the Turkish Naval Forces on September 2023.

#### UNMANNED SURFACE VEHICLE PROJECTS

**MARLIN-ASV:** It is a remote-controlled/ semi-autonomous/autonomous Unmanned Surface Vehicle that can perform

Intelligence-Reconnaissance-Surveillance, Surface Warfare and Electronic Warfare (EW) missions effectively and interoperable with different manned/unmanned platforms. The vehicle is planned to enter the Turkish Naval Forces inventory in 2023.

**ULAQ SİDA:** It is a remote-controlled/ semi-autonomous/autonomous Unmanned Surface Vehicle that can perform Intelligence-Reconnaissance-Surveillance, Surface Warfare and Anti-Submarine Warfare (ASW) missions effectively and interoperable with different manned/unmanned platforms. The vehicle is planned to enter the Turkish Naval Forces inventory in 2023.

**SANCAR SİDA:** It is a remote-controlled/ semi-autonomous/autonomous Unmanned Surface Vehicle that can perform Intelligence-Reconnaissance-Surveillance, Surface Warfare and Mine Countermeasure (MCM) missions effectively and interoperable with different manned/unmanned platforms. The vehicle is planned to enter the Turkish Naval Forces inventory in 2023.

**SALVO SİDA:** It is a remote-controlled/ semi-autonomous/autonomous Unmanned Naval Surface Vehicle that can perform Intelligence-Reconnaissance-Surveillance, Surface Warfare missions and those missions requires Drone effectively and interoperable with different manned/unmanned platforms. The vehicle is planned to enter the Turkish Naval Forces inventory in 2024.

**MİR USV:** Special ASW/ASuW mission capable, Manned-Unmanned Teaming (MUM-T) ready, Swarm enabled, autonomous/semi- autonomous Unmanned Surface Vehicle.

**Albatros-S USV:** Un-authorized/suspicious target sea vehicle engagement, Search and Rescue, Wide Sea Area Scanning, High-Value Platform Escort and Protection, Multi-Risk Mission capable, Manned-Unmanned Teaming (MUM-T) ready, Swarm enabled, autonomous/semi-autonomous cost effective Unmanned Surface Vehicle.

# A SUSTAINABLE IMPRINT...

In 145 countries, with over 370 correspondents, we touch both ships and the blues. Besides our achieved success along the way, we are leaving a sustainable imprint in worldwide seas through the steps taken to preserve the future.



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**VENTO**  
deniz işletmeleri

# THIS YEAR WE ARE PARTICIPATING IN THE POSIDONIA WITH THE HIGHEST NUMBER OF EXHIBITORS



\* **CEM SEVEN**

As the Turkish Ships, Yachts and Marine Services Exporters Association, we continue being a part of Türkiye's national participation organizations and information events at maritime fairs around the world. In these organizations, we ensure that our member companies have the best fair participation experience under the most favorable conditions and that they effectively benefit from government supports.

We have undertaken the Turkish national participation organization for the Posidonia Fair since 2014 and this year, we are taking part with the highest number of exhibitors under the umbrella of Türkiye's national participation. Our 14 member companies will take part in this organization, besides our info area to provide general information and bilateral business meetings on behalf of the sector. In addition, apart from the Turkish national participation organization, more than twenty Turkish companies will participate individually. Posidonia is among the most important fair organizations for our industry in the world. Türkiye's national participation area is located in Hall 1 of the fair, one of the most prestigious areas

of the fair. We will be in a larger area with more exhibitors compared to previous years and we plan to be busier and more active than ever this year.

Our national participation area will include shipyards such as İcdaş, Seltaş, Çeksan, Ada, Med Marine, our non-governmental organization GISBİR, our side industry companies, equipment manufacturers, food companies and supplier companies. In addition, many shipyards and side industry companies will participate in the fair individually. As in many international fairs, we have been preparing for months to focus the attention on Turkish companies and to promote the country effectively.

We plan to organize a reception event simultaneously with the fair in cooperation with the Chamber of Shipping and to host our foreign guests at this reception so that our companies can establish better relations. We would like to visit our exhibitor companies together with our Ambassador to Athens, Mr. Çağatay Erciyes and ensure that our companies take a more active role in the Greek market with the support of our commercial representatives.

This year, our national exhibition participation organizations and industrial representation mission will start with the Posidonia Fair in June, and will continue with SMM Hamburg, Norfishing, Monaco Boat Show and Cannes Yachting Festival until the end of the year. As the years go by, we see the results of the steps we have taken at fairs to make our country and our industry stronger internationally, more significantly in our export figures. We believe that the successful fair organizations we have organized have been effective in increasing our industrial exports from 1 billion dollars annually to 1.94 billion dollars in just a few years, and we are expanding our impact area

by growing in terms of both quality and quantity by putting a little more into each fair.

Our industry continues to be the rising star of the world in terms of exports of special purpose, customized ship types. In recent years, we have become the world's top exporter in fishing vessel and we maintained this status with our 487 million dollar fishing vessel exports in 2023. In addition, by exporting tugboats worth 313 million dollars in 2023, we managed to become the world's top exporting country in this field. Our yacht exports, mostly mega yachts, reached the highest export figure to date, reaching 408 million dollars in 2023.

It is clear that both IMO and European Union regulations and the environmentalist approach in the world will trigger newbuilds in all ship types. The ability of our shipyards to build environmentally-friendly ships makes Türkiye an important center in terms of meeting the demands in special purpose ship orders. Our industry has proven its maturity in sustainability and environmentalism worldwide and successfully meets the demands for alternative fuel use, quickly adapts to the use of new technologies and sets successful examples.

Our country is able to build marine vessels that are propelled by both LNG and electricity, that run on dual fuel methanol, that are hybrid and require high engineering craftsmanship. The average unit price per kilogram of products exported from Türkiye is recorded as 1.57 dollars, and this figure is over 30 dollars for new built ships and yachts. This is the most important indicator of how important the products produced by our industry are in terms of added value.

\* **CHAIRMAN OF THE TURKISH SHIPS AND YACHTS EXPORTERS ASSOCIATION**



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# EVALUATION OF THE EVOLUTIONARY PHASES OF TURKISH MARITIME LAW IN LIGHT OF THE GLOBAL DEVELOPMENTS IN THE FIELD



**\*SELÇUK ESENYEL - ATTORNEY**

Maritime law is a branch within legal field that can be traced back to a former age where it continues to evolve alongside developments in commerce; Particularly within the borders of Turkey, which is surrounded by seas on three coasts. The need for the sustainable and continuous development of Turkish Maritime Law is relevant given both the country's geopolitical position and the significant volume of trade it facilitates.

The geopolitical position of Turkey is carefully considered, especially through the annual data published by the General Directorate of Maritime Affairs (referred to as "DMA") under the Ministry of Transport and Infrastructure of the Republic of Turkey. This data, encompassing vessel passages through the Turkish Straits encompasses; cargo, ships, and other relevant statistics for the years 2022-2023 as well as highlighting the significant volume of Turkish maritime trade. Consequently, this data underscores the urgent necessity for sustainable and continuous development of Turkish

Number of Vessels That Passed the Istanbul Strait	Number of Vessels That Passed the Canakkale Strait	Total Number of Calling Vessels	Total Cargo Handled
35.146 (541.44.690 gross tonnage)	42.340 (871.621.677 gross tonnage )	58.052 (40.131 Foreign flagged, 17.921 Turkish flagged, 873.329.628 gross tonnage in total)	542.610.283 tons (250.150.574 tons during loading, 292.459.709 tons during discharge)
Foreign Trade Volume	Number of Marine Accidents	Total Import	Total Export
394.090.021 tons	291	243.917.119 tons	150.172.902 tons

[Chart-1: Maritime data published by the Turkish DMA pertaining to the year 2022]

Number of Vessels That Passed the Istanbul Strait	Number of Vessels That Passed the Canakkale Strait	Total Number of Calling Vessels	Total Cargo Handled
39.000 (621.638.378 gross tonnage)	44.892 (941.519.970 gross tonnage)	60.195 (40918 Foreign flagged, 19.277 Turkish flagged, 894.059.943,31 gross tonnage in total)	521.079.804 tons (217.954.335 tons during loading, 303.125.469 tons during discharge )
Foreign Trade Volume	Number of Marine Accidents	Total Import	Total Export
391.717.308 tons	240	256.206.627 tons	135.510.681 tons

[Chart-2: Maritime data published by the Turkish DMA pertaining to the year 2023]

Maritime Law. The data presented above reveals that, it appears to be a downward trend in exports in 2023 compared to 2022.

However, according to these data, overseas trade through Turkish waters continues to sustain its momentum without losing tempo, and there is a visible growth in the number of ships passing through Turkish waters on a yearly basis. In addition, the number of maritime accidents, which have been consistent, reveals the importance of implementing regulations, particularly in the fields of maritime collision and liability.

## I. Normative Developments in Maritime Law in the Global Historical Plane

Due to the complexity and international scale of maritime trade, there has been a need for legal regulations to ensure that commercial activities at sea are carried out in a fair and effective fashion through the course of history.

The provisions in the Turkish Maritime Law have supported the development of the maritime sector by providing a legal framework for Turkey's maritime trade and gradually aligning itself with the international standards.

In essence, it is possible to analyse the historical process in which maritime trade law developed and matured in three separate phases, as it casts light on the development of Turkish Maritime and Trade Law. Before the codification movements, Maritime Law developed and applied as sets of customary rules since the early days of global trade, and national regulations were introduced at the beginning of the 17th century coinciding with the emergence of the nation-state conception in the wake of the French Revolution.

As maritime trade has exponentially expanded its reach over time, the adoption of uniform international rules became imperative. Within this study, we reference these norms, only to the extent that they are considered relevant, particularly regarding their individual influence on Turkish Maritime Law.<sup>1</sup>

## II. Regulation of Maritime Trade in Turkish Law and the Contemporary Paradigm

In view of the volume of maritime trade throughout Turkish history, especially under the rule of the Ottoman Empire, and the consistent interaction with neighbouring merchant states (both via trade and military conflicts), it was





only natural that there would have been a need to regulate maritime trade. However, due to the scarcity of data on the subject, it is assumed that Sharia law, the legal framework of the Ottoman Empire, along with customary law, which was consistent with Sharia law, played a pivotal role in shaping the course of maritime. In this context, the first written regulation on maritime trade law in the history of Turkish law was the Ticaret-i Bahriye Kanunname-i Humâyûnu (the Code on Maritime Commerce) dated 1864, which was based on the French Commercial Code of 1807 and the Dutch Commercial Code, including the provisions on passenger carriage contracts and the provisions on collision rules.

As the Ticaret-i Bahriye Kanunname-i Humâyûnu proved inadequate in meeting the evolving demands of maritime trade, a significant legal reform was undertaken following the establishment of the Republic of Turkey. This reform culminated in the enactment of the Code on

Maritime Trade No. 1440, adopted on 21.11.1929. This code, based on the German Commercial Code of 1897, became the second book of the Commercial Code, titled “Maritime Trade.”. Unfortunately, due to translation errors in the Code, its complex language, and the fact that most of the provisions were related to sailing ships rather than steamships, thus failing to meet the modern demands of maritime trade. It is worth noting that during this period, the Code on Cabotage, enforced on 29.04.1926, sought to nationalize trade by abolishing commercial privileges previously granted to foreign-flagged ships in Turkish waters, However, this policy resulted in adverse effects, primarily due to the constrained commercial prospects for Turkish ships in the post-war environment, compounded by the Code’s impact on free competition. Nonetheless, foreign-flagged vessels maintain their commercial activity in Turkish waters by transporting mainly through off-shore companies, as the data above also demonstrates.

At the beginning of the 20th century, the Industrial Revolution and the investments of industry stakeholders accelerated the transition from sailing ships to steamships, leading to a significant leap in maritime trade. This was recognised especially after World War II. These technological advances due to the war increased the volume of international maritime trade and led states to uniformize legislation in this domain.

In Turkey, legislative amendments were initiated from the 1930s onward, culminating in a major revision at the end of World War II. The Code from 1929 was revised in alignment with the contemporary provisions of the German Code on Merchant Shipping Law, and as of June 29, 1956, it was incorporated as the fourth book of the Turkish Commercial Code.

This update was aimed at modernizing Turkey’s maritime legal framework to better reflect the new realities of international maritime trade.

In view of the scale of global maritime trade, which has gained momentum due to the developments in shipping and transport, the Turkish Commercial Code No. 6102, which entered into force on 1.7.2012, has been introduced with large-scale amendments in the form of reforms in the Fifth Book titled “Maritime Trade”.

Throughout the legal drafting process, revisions were made by taking into account the international treaties to which Turkey has become a party, as well as national legislation, which the version of the Code is still in force today. In addition, special laws such as the Code of Ports, the Environmental Law, the Turkish Code on International Ship Registry and the international treaties ratified by Turkey also reflect the current state and scope of maritime law in Turkey.

One of the key strengths of the book titled “Maritime Trade” within the Turkish Commercial Code No. 6102 is how it aligns with international regulations and frameworks that Turkey has agreed to in this area. These include the 1978 UN Convention on the Carriage of Goods by Sea (known as the Hamburg Rules), the International Convention for the Prevention of Pollution from Ships (MARPOL), and the 1972 Regulation on Prevention of Collisions at Sea (COLREG). Additionally, it follows the provisions of the Code regarding the carriage of goods overseas (Art. 856 et seq.), the removal of oil pollution at sea (Art. 1328 et seq.), and collision regulations (Art. 1286 et seq.), among others. That are relevant international conventions in this field, however their details aren’t mentioned in this article’s scope.

Nonetheless, the Code frequently references these conventions, acknowledging their influence and compliance. When these provisions are evaluated together with Article 90 of the Turkish Constitution (which regulates the binding force of international

treaties alongside rules of law), it is observed that the Turkish Commercial Code reflects the existing principles of international conventions in the field of maritime law and successfully integrates them into Turkish maritime law.

### III. Conclusions and Final Remarks

Located at the crucial junction point of three different seas, Turkey, especially the Turkish Straits, is the geopolitical connection route between Europe and Asia, leading to a high concentration of maritime traffic in its waters.

In the Turkish maritime sovereignty area, where maritime trade has become a critical economic phenomenon, the need to regulate such method of trade through legal rules arose, and the national and international regulations developed as a result of the cumulative legal tradition were incorporated into Turkish law during the Ottoman Reform and Turkish Republican periods.

Moreover, besides the Turkish context backed up by the above data, the 2023 Review of Maritime Transport circulated by UNCTAD forecasts a global growth of 2.4% in maritime trade volume in 2023 and more than 2% between 2024 and 2028, despite the ongoing Ukraine and Palestinian crises. In this context, it becomes pivotal that Turkish legal regulations remain up-to-date and in harmony with international regulations in order to maintain pace with such potential breakthroughs within the paradigm of international maritime trade.

Ultimately, considering the strategic position of Turkey, the increase in academic studies in the field of maritime law is of vital importance for the adoption of international standards in the field of maritime trade and the creation of a reliable trade environment. Such an effort will greatly help Turkey in its way to become an important legal centre in maritime disputes and to play an effective role in the international commerce scene.

***<sup>1</sup> For a more detailed explanation, please observe the following: In antiquity, maritime law was first regulated by civilisations in the Mediterranean basin. In particular, instruments such as the Ur-Nammu, Lipit-Ishtar, Eshnunna and Hammurabi Codes, which date back to 3000 B.C., deal with issues such as vessel charter, collision, liability of the shipowner and carrier, and general average. Subsequently, from 700 B.C. onwards, the Laws of Rhodes and Roman law contained similar regulations.***

***After the fall of the Roman Empire, new regulations were needed with the needs posed by the increasing population and global trade portfolio, and in this respect, independent regulations such as the Oleron Rules of France, the Consolato del Mare of Barcelona and the Wisby Rules were introduced. (a. Pre-Codification Period) During the 17th century, nation states determined their own norms in maritime trade under the influence of the French Revolution.***

***During the Napoleonic era, the Code de Commerce (French Commercial Code) was published in 1807, and then became a reference for the British Merchant Marine Code of 1854 and the German Commercial Codes of 1861 and 1897. (b. The Codification Process) As maritime trade needed to be regulated at the international level, various conventions were concluded with the contribution of organisations such as ILA, CMI and IMO.***

***As a part of these conventions, issues such as ship technology, trade conditions, liability regime and ship registration were regulated and international standards were integrated into national norms and duly accepted (c. International Uniformisation Process).***

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**\* SELÇUK ESENYEL / ESENYEL & PARTNERS LAWYERS & CONSULTANTS - MANAGING PARTNER & FOUNDER**



ESEN YEL & PARTNERS

# TOP PRIORITY: STRIVING FOR EXCELLENCE



**\*CİHAN ERGENÇ**

The Turkish Shipowners Association, established on August 10, 1939, is an association and one of the 100 Shipowners Associations worldwide. Shipowners Associations around the world constitute the core of maritime transportation and, in this sense, these associations deal with strategic-level issues such as the development of maritime transportation policies, determination of strategies, and shaping the industry, and they are at the top of the sector as civil society organizations.

Currently, the Turkish Shipowners Association also serves the maritime

transportation sector as the top civil society organization. Our shipowners, who own half of the tonnage of the Turkish-controlled merchant fleet, are members of our association, and our membership is increasing day by day.

The Turkish Shipowners Association aimed at in its sector;

- Striving for excellence by building on realistic insights and approaches to achieve sustainable solutions,
- Maintaining a high level of professionalism, scientific rigor, and analytical approach,
- Being solution-oriented by providing effective and productive processes with accurate and appropriate results for the sector,
- Being forward-looking by conducting sector analysis with accurate data and assessments in a research-oriented structure,
- Creating synergy by establishing effective and strong collaboration with internal and external stakeholders,

With these adopted values;

- The Turkish Shipowners Association contributes to increasing the global competitiveness of Turkish maritime

transportation and aims to position Turkey among the most influential and effective countries in global maritime transportation.

- By fostering a common understanding, it contributes to the development and implementation of national and global maritime transportation strategies and policies.
- It contributes to the enhancement of the quality and quantity of the Turkish Merchant Marine fleet.
- In line with these objectives, it conducts research, forms opinions, develops projects, and organizes events.
- As the top structural organization of the Turkish maritime transportation sector, it aims to create consensus by conveying the views of its members and the sector to the government, state, relevant institutions and organizations, and international bodies, and to generate solutions to sectoral problems.

One of the Turkish Shipowners Association's most important objectives is the promotion of Turkish shipping both nationally and internationally. To this end, we view both domestic and international fairs and promotional activities as opportunities, and we attach great importance to them.

Furthermore, these fairs provide our shipowners with direct access to producers and suppliers. Additionally, we particularly value the Posidonia event for being one of the most significant gatherings in the maritime sector, presenting the latest developments and trends in the industry, and providing an opportunity to meet with international sector leaders.



**\* CHAIRMAN OF THE BOARD OF TURKISH SHIPOWNERS ASSOCIATION**



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# THE CURRENT SITUATION AND VISION OF THE TURKISH PORT SECTOR AND TÜRKLİM



**\*HAMDI ERÇELİK**

## TÜRKİYE'S POSITION IN THE GLOBAL PORT SECTOR

The port sector is one of the most important industries that constitute the backbone of international trade. As of 2023, ports worldwide handle approximately 12 billion tons of cargo annually, accounting for about 80-90% of global trade. While the adverse effects of the COVID-19 pandemic on maritime trade and the port sector gradually diminish in 2020 and 2021, the negative impacts of the Russia-Ukraine war in the Black Sea on maritime trade and the sanctions imposed on Russia, as well as the Yemen War affecting the security of the Red Sea and continuing to have adverse effects on maritime trade and port activities from 2023 onwards. Despite the regional crises' global implications, international maritime trade is forming

alternative routes and ports. In spite of the crises negatively impacting the maritime and port sectors in the short term, the global maritime trade volume, which shows an average annual increase of 3-4%, necessitates the port sector's development in equal measure.

Looking at Türkiye's position in the global port sector, during the ten-year period examined from 2011 to 2021, while the average global increase rate in total cargo was 2.3%, this increase in Turkish ports was 3.8%. Regarding containers, during the same period, while the average global increase was 3.8%, the increase in Turkish ports was 6.6%. To evaluate the development of the Turkish port sector more accurately, a broader process needs to be analysed. For example, in parallel with industrialization and export-oriented growth strategies accelerated since the 1980s, the rate of cargo increases in ports, especially in the last 33 years (1990-2023), has increased significantly. This growth amounted to 3,461% in containers and 249% in total cargo.

In the last decade (2014-2023), the amount of cargo handled in our ports increased from 158 million tons to 218 million tons, while the cargo discharged increased from 225 million tons to 303 million tons during the same period. In terms of percentage, the annual growth rate of the total cargo handled in our ports over the last decade was 3.1%. During the last decade, this growth rate was 4.3% for export cargoes, 2.8% for import cargoes, 3.1% for transit cargoes, and 2.1% for cabotage cargoes. In 2023, a total of 521,079,804 tons of cargo were handled in our ports, consisting of 256.2 million tons of imports, 135.5 million tons of exports, 66.7 million

tons of transit, and 62.6 million tons of cabotage cargoes. When looking at the distribution of cargo handled in our ports according to regimes, it is observed that approximately 75.2% of the cargo consists of our foreign trade, while the share of transit cargoes is 12.8% and cabotage cargoes is 12.0% as of 2023. The success of our ports, which grow above the global average, has been achieved especially in the last 25 years through the increase in private sector investments in ports and strategies and practices aiming to realize the national port vision.

## THE ROLE OF THE PORT OPERATORS' ASSOCIATION OF TÜRKİYE (TÜRKLİM) IN THE DEVELOPMENT OF PORTS

Out of the total 217 coastal facilities serving general maritime trade in Türkiye, 194 are ports serving international maritime trade. Of these ports in terms of capacity, 80% are members of the Port Operators' Association of Türkiye (TÜRKLİM), which is the sole Non-Governmental Organization of the sector. In Türkiye, 95% of the handled containers, 67% of dry bulk and general cargo, 100% of liquid chemical cargoes, 87% of Ro-Ro transportation, and 97% of cruise tourism are handled by TÜRKLİM member ports. In this regard, TÜRKLİM is aware that it is not only the representative mission of the sector but also one of the stakeholders responsible for carrying Turkish port operations into the future through strategic guidance.

Within this scope, as an effective non-governmental organization, TÜRKLİM has been bringing together port operators in our country since its establishment in 1996, discussing common problems and needs, providing significant contributions in coordinating solutions and requests with the



administration, striving to disseminate the best practices in our ports through working groups established among our members, and engaging in qualified information sharing with our stakeholders and sectoral organizations abroad. In addition, to create awareness among our authorities and stakeholders to ensure that our port facilities, which are the backbone of our domestic and foreign trade and maritime tourism, can timely make infrastructure investments that precede the needs of our growing economy, and to provide opportunities that will serve this purpose with solution-oriented approaches is at the forefront of TÜRKLİM's activities.

Moreover, having characteristics of a reference-accreditation institution, TÜRKLİM ensures the determination, measurement, evaluation, and certification of training standards for port operations at site, as well as standardization and coordination among sectoral institutions and organizations with quality and assurance duties. With its capabilities and responsibilities, TÜRKLİM is one of the determining forces of the development of the sector

and plays a crucial role in establishing the port management model that internalizes green transformation in our port operations as an indispensable business model. In the context of the specified tasks and responsibilities, TÜRKLİM has established 8 Working Groups to bring together field workers by cargo groups, identify common problems, and create action plans for solutions related to these problems and encourage coordination, collaboration culture, and mutual assistance among our port facilities.

These Working Groups, namely 'Occupational Health and Safety,' 'Container,' 'General Cargo and Dry Bulk,' 'Liquid Bulk,' 'Ro-Ro and Automotive,' 'Cruise and Passenger,' 'Digital Technologies,' and 'Disaster and Risk Management in Ports,' create action plans for many issues through regular meetings.

With the awareness of its duties and responsibilities, TÜRKLİM transfers this knowledge and awareness to its members and the sector with Vision Reports (Vision-2023, Vision-2050)

published periodically, Sector Reports published annually, and e-magazines and bulletins published every three months. Additionally, being an active member of the International Association of Ports and Harbors (IAPH) and the Sectoral Associations Federation (SEDEFED), TÜRKLİM closely monitors developments related to the European Union and informs member ports.

Consequently, TÜRKLİM will continue its efforts with all our stakeholders, primarily our public administration, to determine roadmaps, needs and impact analyses, capacity requirements, and legislative requirements in line with global practices, aiming to elevate our port sector to a much higher level, especially in line with the paradigm and business model of the sector with very high global partnership and stakeholder qualities, including green transformation, and to open the way for the growth and development of the maritime sector.

**\* CHAIRMAN OF THE BOARD OF PORT OPERATORS' ASSOCIATION OF TÜRKİYE (TÜRKLİM)**

# TURKISH SHIPPING DEVELOPS AND BUILTS THIS DEVELOPMENT ON SOLID FOUNDATION



\* UFUK TEKER

Posedonia 2024 is getting ready to open its doors to its guests. This event actually brings together almost the most important players of the shipping industry worldwide. In addition, as the host country Greece has a share of more than 20% in the world shipping tonnage and the fleet value exceeds 150 billion USD, leads to an increase in the number of participants, turning into a show of strength for Greece. As Turkish seafarers, I believe that it would be a very good opportunity to make contacts by taking advantage of an event of this scale that is so close to us.

What should we understand when it comes to shipping? I would like to talk a little about how a country becomes a sea nation. In my opinion, Türkiye has taken very meaningful steps in terms of becoming a seafarer in the last 15 years and continues to do so. I believe that the correct policies and investments implemented are finally starting to yield results.

When I say that Türkiye is a “sea nation”, I actually make this determination with very serious grounds. In my opinion, China and Türkiye, with a population of 1.5 billion and a coastline of 18,000 km, are ahead of all known maritime areas. While other countries are only good in some areas, these two countries lead the world maritime industry.

- It is clear that Türkiye is the most dynamic country in its region, with around 1000 large and small shipyards, both in terms of new build and repair.
- While the education levels of sailors are increasing with the special attention given to maritime education, it is also another fact that we are the country that exports the most sailors in the region, due to the Ukraine-Russia war.
- We are third in the world in yacht production.
- We have the only ship dismantling yard in the region.
- We have the most advanced equipment in our region in terms of Off Shore and oil exploration capabilities.
- We also have one of the most beautiful beaches and mildest climates in the world in sea tourism. Yes, we may be ignored in the cruise ship segment, but we put our own style in sea tourism with our daily cruise boats and world-famous gulets.
- We have progressed a lot in coastal fishing and our fishermen have now ventured into ocean fishing.
- We have placed ourselves at the top of the world league in the defense industry.

- Our shipowners have been the highest buyers of many different ship types in the last 2 years.

In addition to all that I have mentioned, the best news of recent years came from Türk Loydu on the 100th anniversary of the Republic. Finally, we have received the well-deserved IACS membership. Now our national classification society, Türk Loydu, has taken its place among the most elite in the world. I think that the things that Türk Loydu will contribute to our shipping industry go far beyond the classification of just a few additional ships.

While the classification society takes its place in the elite league, Türk P&I provides insurance coverage for our developing fleet and has started to serve not only the domestic market but also foreign customers. Its young and highly technical team is constantly increasing in numbers, and the development of the company in every sense is progressing at an incredible pace. Very soon, Turkish Marine Insurance, which is developing with Türk P&I, will take its place in the market after London, Scandinavia and Italy.

Turkish shipping is developing, and it bases this development on solid foundations. I have no doubt that we will leave our competitors behind in a very short time. I hope the Posedonia Fair will be very productive for all our seafarer fellows.

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\* TÜRK P&I / GENERAL MANAGER





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# “POSIDONIA 2024 WILL OFFER IMPORTANT OPPORTUNITIES FOR REPRESENTATIVES OF THE SHIPPING INDUSTRY”



**\*HAKAN ÇENDİK**

Due to the nature of shipping, it is affected by global economic factors, sudden and long-term developments in trade and wars, which makes it necessary to consider this type of transportation from more than one perspective. The Russia-Ukraine war, which started when we were on the verge of overcoming the impact of the pandemic, requires a more in-depth analysis of the ‘effects of the war’, especially in terms of coaster transportation. So much so that the war lasted longer than expected, and coaster owners and operators completed 2023 in an environment dominated by uncertainties, as they did in 2022. In addition, the operation launched by Hamas against Israel on October 7 gave us the signal that the situation in the region, including commercial activities, would go even further back than before. Parallel to this situation, another development that was reflected in global shipping was the attacks of the Houthis in Yemen, endangering the passages in the Suez Canal, which connects the Mediterranean to the Red Sea and

offers our ships the shortest and most economical route between Europe and Asia. High insurance premiums reflected on ships carrying cargo to or from the Middle East have created an unexpected cost item for shipowners and operators. 12 percent of global trade is carried out in this region, and the developments reflected here brought back the “supply chain” concerns seen with the pandemic and the subsequent Russia-Ukraine War and “new routes were formed in the seas”.

As we leave the first quarter of 2024 behind, coaster owners and operators continue to “carry the burden of the world”, contribute to the country’s economies, benefit the maritime industry and employ our sailors despite everything. Association of Turkish Coaster Shipowners and Operators (KOSDER), the only non-governmental organization in Turkey and one of the few in the world representing coaster ships, always strives to support the commercial adventures of coaster shipowners and operators. Our Association contributes to the maritime industry with its national and international organizations, and also provides up-to-date information to our maritime industry delegates and sailor students with the trainings it organizes under the roof of KOSDER Academy. Aware of its advantage of being located in Istanbul, one of the important centers of the maritime industry, KOSDER attaches great importance to bringing together the world’s maritime industry delegates in this important geography. With the Istanbul International Conference and Gala Dinner (ISTSHIP) held under the leadership of KOSDER on September 22, 2022, our Association became the partner of a major step taken within the framework of this goal. I would like to thank once again Mr. Charalampos Simantonis,

Chairman of the Board of Directors of the Hellenic Shortsea Shipowners Association (HSSA), Mr. Charalampos Simantonis, members of the Board of Directors and all our Greek friends, who have made a great contribution to the emergence and successful realization of ISTSHIP-22, and whom we hosted in our country representing Greece, the guest country of the organization.

Continuing its works in this direction, KOSDER will bring the world shipping together and, while doing this, will soon offer other events for the benefit of our maritime industry delegates, to discuss and draw the future course of the maritime industry. For this purpose, by bringing together seafarers from all over the world in the magical atmosphere of the Bosphorus, we aim to showcase our Country, which we describe as the ‘Blue Homeland’, to the world once again.

Just like non-governmental organizations, fairs also play an important role in terms of industrial sustainability and unity. I think that Posidonia 2024 to be held in Greece, which has the world’s largest shipping fleet, will offer important opportunities for representatives of the maritime industry this year, as always. I would also like to express that, together with the ‘Posidonia Games’, which will include many games and activities, the organization can be considered as a “shipping festival” not just a fair, for seafarers to come together in every field. Finally, I wish a successful fair to the exhibitors, participants and all the officials who contributed to the creation of this important event.

**\* CHAIRMAN OF THE BOARD OF DIRECTORS OF THE ASSOCIATION OF TURKISH COASTER SHIPOWNERS AND OPERATORS**

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# “WE ARE WORKING HARD IN ORDER TO REPRESENT OUR COUNTRY ABROAD IN THE BEST WAY”



**\*İSMAIL ŞAHİN**

The international Bosphorus Shipbrokers Dinner which we will host as association for the sixth time this year will be held at the Lütfi Kırdar Congress Center on Friday, June 28, 2024. As the Board of Directors of the Shipbrokers Association aiming to carry out the success of previous boards into one step further with valuable support of all our members and sponsors.

All leaders of the world maritime industry will meet in Istanbul at the Bosphorus Shipbrokers' Dinner 2024. Key Leaders, higher-rank company officers from national and international shipping communities are attending our traditional shipbrokers dinner. We expect the number of participants to be about 2,400 people. Approximately 1,000 thousand participants are our foreign guests. Global market managers of the maritime industry from Greece, England, Germany, Switzerland, Italy, Spain, France, Netherlands, Belgium, Denmark, Norway, Poland, Croatia, Bulgaria, Romania, Ghana, Singapore, China, Ukraine and the other countries

of the world will be participating our lovely shipbrokers dinner.

The aim of our business is to facilitate international maritime transportation with our vast knowledge, valuable experience and network. In this context, I would like to proudly state that the Turkish maritime industry has achieved international integration at the highest level in Europe and throughout the world. All shipping industry including Brokers, Shipowners, Charterers, Shipyards, Ports, all our companies serving in the supply of oil, fuel, spare parts and side industry, and all office employees, including operation and chartering teams, our commercial vessels working in the international waters and all our crew working on vessels are properly certified and trained according to international regulations involved successfully in the maritime industry.

As our Great Leader Gazi Mustafa Kemal Atatürk said, we consider Maritime as the great national ideal of the Turks in order to move our century-old Republic to a better points. In this regard, we, as the Board of Directors of the Turkish Shipbrokers Association, together with all our shipping industry communities are working hard as much as we can in order to represent our country in the best way, especially abroad, with the contributions of our valuable members for the further development and progress of Turkish maritime.

On June 28, senior executives of BIMCO & FONASBA & FOSFA & ICS & HSA (Hellenic Shipbrokers' Association), VHBS (The Hamburg and Bremen Shipbrokers' Association) will attend our dinner as our valuable guests. The opening of ICS Türkiye will be held in Istanbul on June 27

with the participation of ICS's senior management.

As the Shipbrokers Association, we participated the Pireas 2023 Ship Broker Dinner as guest of HSA (Hellenic Ship Brokers), also attended the Shipbrokers Dinner Hamburg 73th Eisbeinessen 2023 maritime dinner in Germany with 60 members. We will continue to participate in similar events in other European countries in the near future. Professor Hercules Haralambides will also attend our dinner as our honor guest who is a valuable treasure in the international maritime industry.

IMEAK DTO (Chamber of Shipping Commerce) as umbrella organization of our shipping industry is on the top of our list as our honorary sponsor as our usual supporter. Meantime we would like to express our endless gratitude to all our SPONSORS believe wholeheartedly our organization.

Bosphorus Shipbrokers Dinner is of great importance for us and will benefit for our maritime industry as it brings together the world maritime industry in Istanbul. Moreover, we make a serious contribution to the promotion of our country and lovely Istanbul and to our tourism industry. With the pride and enthusiasm of representing our country in the best way in the international maritime community, we are very excited about holding such an amazing and enjoyable organization 'Bosphorus Shipbrokers Dinner' hosting sixth time on 28 June 2024 with all our members and valuable shipping communities in our maritime industry.

Wishing fair winds and following seas.

**\* CHAIRMAN OF THE TURKISH SHIPBROKERS ASSOCIATION**

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# SANMAR DELIVERS ITS 300TH TUGBOAT BUILT TO ROBERT ALLAN LTD DESIGN

Sanmar Shipyards has delivered its 300th tugboat based on a design by renowned Canadian naval architects Robert Allan Ltd.



The Turkish tugboat builder reached this milestone with the recent delivery of one of its ground-breaking emissions-free battery electric ElectRA tugs to Norway-headquartered operator Buksér og Berging, where it will be based at the Port of Oslo. Named BB ELECTRA by its new owners, the eco-friendly tug was built based on the exclusive-to-Sanmar ElectRA 2200 SX design from Vancouver-based Robert Allan Ltd.

SANMAR, which operates three purpose-built, state-of-the-art, and environmentally-friendly shipyards in the heart of the Turkish maritime sector, has always prided itself for being at the forefront of innovative technological advance.

Among the many examples of this are the delivery of the world's first LNG-fuelled tugboats in 2014; the delivery

of the world's first remote operated commercial vessel in 2017; the building of the world's first hydromechanical hybrid (AVD) tug in 2019 and the development and delivery - so far - of six ElectRA Series 'Battery Electric Tugs' to international operators.

SANMAR has taken a strategic decision to champion and lead the drive to a new era of low and no emissions tugs to create a sustainable future for the tug and towing industry, based on technological advance and alternative fuels.

The recent steel cutting ceremony marking the start of the construction of the world's first large purpose-built dual fuel methanol escort tugs was another example of Sanmar putting this strategy into action. The steel-cutting was for two tugs based on the RAsalvor 4400-DFM

design from Robert Allan Ltd, destined to work for KOTUG on the west coast of Canada – the first project Sanmar has undertaken with the Netherlands-headquartered international operator.

Ali Gürün, Chairman of Sanmar Shipyards, said: "We have had a long and extremely successful relationship with Robert Allan Ltd that has led us building some of the most important landmark tugs of the past 30 years.

This continues to be the case going forward, as new advanced technologies are utilised and alternative fuels and power sources become the norm. Innovation has always been at the heart of our relationship. Three hundred deliveries is a magnificent milestone to reach."

Mike Fitzpatrick, President & CEO of Robert Allan Ltd., said: "Robert Allan Ltd are very proud to have played a role in the success of Sanmar Shipyards over the past 30 years. To have successfully built 300 vessels together is an incredible achievement that has relied on the mutual respect and trust that both parties have for each other.

On the very few occasions where problems have arisen on a project, both parties have skipped the finger pointing phase and moved straight to the problem solving phase.

This is how enduring business relationships are forged. We offer our deepest congratulations to our friends at Sanmar for this achievement and look forward to celebrating the 400th and 500th vessels in the not too distant future."



# LEADING THE WAVE TO BLUE AND GREEN: ŞİMŞEKLER SHIP CHANDLER'S SUSTAINABLE VISION

For Şimşekler Ship Chandlers, environmental awareness and sustainability are critical factors for a better future in maritime industry.



In recent years, sustainability has emerged as a critical consideration for businesses across all industries. As concerns about environmental impact and corporate responsibility continue to grow, companies must adapt to a more environmentally conscious commerce. The ship supply business, which plays a crucial role in supporting the maritime industry, is no exception. For Şimşekler Ship Chandlers, which proudly pursues its pursuit of excellence, respect for the environment is a way to establish this value. And they are pleased to share their perspective on the importance of sustainability in maritime industry.

The maritime industry plays a vital role in global trade, but it also has a significant impact on the environment. As a leading ship supply company, they recognize their responsibility to minimize this impact and contribute to a more sustainable future. Sustainability in this sector encompasses a wide range of practices, from reducing carbon emissions to promoting ethical labor practices. By embracing these ideas, they aim to reduce their environmental footprint and improve the general

wellbeing of society, not only in the nation but world-wide.

One of the key ways they can make significant impact on their environmental footprint is by focusing on reducing carbon emissions. That's why they are investing in fuel-efficient vehicles, optimizing their routes, and exploring alternative fuels to minimize the effects on environment. They use cutting edge technology equipment in their warehouse, which are top class energy efficient and ecologically conscious.

In addition to reducing emissions, they are also committed to responsible sourcing and waste management. They carefully select their suppliers to ensure that they meet our sustainability criteria. They also have implemented effective waste management practices to minimize their environmental impact, both on corporate and individualistic levels.

Their commitment to sustainability includes collaboration with farmers and preserving local agriculture by implementing good practices. By sourcing from local farmers to provide



their clients with the finest quality fresh food, they support their efforts to create a healthier and greener future. As a part of their social responsibility, they decided to plant an olive oil tree for every vessel supplied by company. Their ultimate object is to plant and donate ten thousand olive trees each year.

Ethical labor practices are also a top priority for them. They believe that human is the center of their business and all workers in the maritime industry deserve fair treatment and safe working conditions. That's why they are deeply interested in employees' well-being and they provide them trainings to operate in a safe environment, as well as they support and lead them to progress in their careers. They not only care about this internally, also work closely with suppliers to ensure that they adhere to strict labor standards and provide a supportive work environment for their employees.

By embracing sustainability, they are not only fulfilling their corporate responsibility but also creating long-term value for our society. Sustainability is not just a trend; it is a fundamental principle that guides everything they do. As they look to the future, they remain committed to leading the way to sustainability in the ship supply business.





# GÖMEÇ DIVING VILLAGE OPENED

Gömeç Diving Village was opened with the goal of making the Gömeç district of Balıkesir city a center of attraction for diving tourism. An Underwater Academy was also established within the Diving Village.



As one of the important projects of Balıkesir Metropolitan Municipality, Gömeç Diving Village was opened with a ceremony held on March 7. The Diving Village is located in the Gömeç district

Ufuk Koçak's presentation "Motivation for Career" and Şahika Ercümen's video "100 Meters with One Breath". Our National Athlete Şahika Ercümen, who is still holding the World Record in



easily, where everyone can easily afford to stay, and can come back after training. It is also a place where handicapped people can get direct service from land and receive diving training by overcoming their disabilities. Firefighters will also be able to receive the training they need in search and rescue operations here".

## TRIATHLON RACES AND SAILING RACES

An Underwater Academy was also established within the Diving Village. At the academy, sportive diving, corporate diving, scientific diving, disabled diving, technical diving and search and rescue training will be provided. In addition, many workshops and activities will be held, including photography workshops, lifeguard races, triathlon races and



of Balıkesir, in the area covering the blue-flagged Güvercin and Martı bays and the coast of Karaağaç, Pelitköy İçmeler and Pelitköy Bağlarburnu. It also has an Underwater Sculpture Gallery exhibiting Balıkesir's values and mythological heroes. The opening ceremony of the Diving Village, which was initially opened in 2022, witnessed a magnificent organization. In the opening program, the audiences had the pleasure of watching the presenter and producer Savaş Karakaş's Gömeç documentary titled "Traces in the Water", the video of "Ayvalık Gömeç Underwater World" with the presentation of Bülent Çalimli, and

Diving, also said that the Diving Village revived their hopes, that it would enable the future young divers to train in much better conditions, and that the Diving Village would contribute a lot to everyone.

And Balıkesir Metropolitan Municipality Mayor Yücel Yılmaz emphasized that they were very pleased to bring such a project to Gömeç. "It has become a beautiful place, bringing together the natural beauties of Gömeç with diving lovers" he said and continued: "Gömeç Diving Village is rapidly progressing towards becoming a brand. It is a fully equipped facility where diving lovers can access

sailing races. The facility is Türkiye's first diving village center in terms of its infrastructure and surface area, and has been designed to enable its use by handicapped citizens. The Diving Village offers the opportunity to obtain international certification at all diver training levels. In addition to the education unit, which was built in harmony with the environment using natural stone and wood, the project area includes a 400 m public beach, a pier for the handicapped, a 9,000 sqm tent camping area, a 2,500 sqm recreational area and a 2,500 sqm social facility areas and a restaurant.

# İZMİR BOAT SHOW CONTINUES TO GROW

Held for the second time this year, MAST İzmir Boat Show - Boat, Boat Equipment and Marine Accessories Fair attracted great attention from sea enthusiasts.



At the fair, which was visited by 21,850 local and foreign visitors, more than 300 boats, engines and accessories with prices ranging from 150 thousand liras to 20 million liras were exhibited, and many sales and agreements were signed.

Hosted by İzmir Metropolitan Municipality and in partnership with İZFAŞ and ED Fairs, MAST İzmir Boat Show - Boat, Boat Equipment and Marine Accessories Fair, held between 1-5 May 2024, brought together world-famous boat brands, major domestic manufacturers of the sector, and equipment and accessory companies in the maritime field. Motor yachts, sailboats, trawlers, speedboats and state-of-the-art boats, equipment and accessories ranging in length from 3 meters to 16 meters were exhibited at the fair. Sea enthusiasts from İzmir and the surrounding provinces showed great interest in the fair. While a large number of boats and equipment were sold before the end of the fair, local and foreign guests who visited the fair negotiated sales and business agreements. Participants, on the other hand, were very pleased with the interest.

MAST İzmir Boat Show, which has grown by 50 percent in its second year and aims to be a platform that directs the sector, has become a meeting point for sea enthusiasts who closely follow the latest trends and innovations. A total of 21,850 people, including 19,392 locals from 33 provinces of Turkey and 2,458 foreigners from 65 countries from Germany to Hungary, from Russia to the Gulf countries, visited the MAST İzmir Boat Show. Turkey, which is among the top three countries in the world in production and is in demand from many parts of the world with its quality production, is also aimed to increase the business volume in the sector with the fair.



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# NEW BOARD OF DIRECTORS FOR IBIA

The new management team took office at the International Bunker Industry Association (IBIA) as of April 1, 2024. UNERCO's CEO Ufuk Erinc is also on the IBIA Board of Directors in the new term.



The International Bunker Industry Association (IBIA), the global voice of the bunker industry, introduced the new management team that will take office as of April 1. IBIA announced on February 26 that Constantinos Capetanakis was elected Chair of the IBIA Board of Directors, Adrian Tolson was elected as the Vice Chair of the IBIA Board of Directors, and Nigel Driffin was elected as the Honorary Treasurer of the IBIA Board of Directors. The vacant membership seats on the IBIA Board of Directors were filled by Unerco Petrol Ürünleri Denizcilik ve Ticaret A.Ş.'s CEO Ufuk Erinc, BunkerTrace Ltd (UK)'s CEO Deanna MacDonald and Bunker Holding Group Legal and Public Relations Director Maria Skipper Schwenn.

IBIA Chair Constantinos Capetanakis joined Star Bulk in 2014. Serving as General Manager of Star Bulk since 2019, Constantinos is responsible for bunkering procurement / strategy and Star Bulk's cooperation with bunker industry stakeholders. Adrian Tolson, Vice

Chair of IBIA, is the owner of 2050 Marine Energy and is widely recognised as one of the shipping industry's leading marine energy experts. With more than 35 years of experience, he has both detailed knowledge and unique insight into the bunker supply chain and its many related infrastructure developments.

Nigel Driffin, Honorary Treasurer of the IBIA Board, is among the founders of IBIA. He served as Chair of the IBIA Board in 2012 and as Treasurer in 2022. He is a technical consultant with over 25 years of experience, and was re-elected to the IBIA Board of Directors in 2023. Driffin has authored 13 books on Bunkering and Shipping and is an esteemed speaker at industry conferences. The continuing IBIA Board Members are as follows: Eugenia Benavides Buitrago, Marine Fuels Director, Terpel S.A; Claudia Beumer, Owner, C4 fuel BV; Rahul Choudhuri, President of Strategic Partnerships, Veritas Petroleum Services (Asia) Pte Ltd; Timothy Cosulich, CEO, Fratelli Cosulich;

Jeroen de Vos, Head of Quality, Peninsula; Colin Holloway, Global Head Technical, Cockett Marine Oil; Paul Maclons, Chair, AMSOL Board of Directors, African Marine Solutions Group (Pty) Ltd; Valeria Sessa, CEO, ReSeaWorld s.r.l.; Anna Stefanou, Finance and Credit Manager, PMG Holding. Ufuk Erinc, CEO of Unerco Petrol Ürünleri Denizcilik ve Ticaret A.Ş., expressed his satisfaction in being in the new management of IBIA and said: "I would like to thank all Turkish and foreign members who supported me. Now is the time to work, it is time to see what lies ahead by clearing the fog. IBIA is a very important and active organization before IMO. Working at IBIA and contributing to change will be an incredible experience.

Bunker has never been more important and complex for all stakeholders. Thanks to this task entrusted to me, I will have the chance to follow international developments closely and be beneficial to the sector and our exports, as well as the Turkish bunker industry and shipping."

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# TURKON LINE AND MEDKON COLLABORATES FOR A NEW LINE

Turkon Line, an affiliate of Turkon Holding, and MEDKON Line signed a partnership for the line from Mersin and Iskenderun ports to Aqaba Port (Jordan) and Jeddah Port (Saudi Arabia).



The two organizations, which have previously cooperated in different ways, signed a new business partnership. Turkon Holding's CEO Alkın Kalkavan and MEDKON Line's CEO Mahmut Işık came together to put into operation the line from Mersin and Iskenderun ports to Aqaba Port (Jordan) and Jeddah Port (Saudi Arabia). In order to meet Turkish exporters' serious demands for that region, the two companies signed an important partnership and started their operations on their new routes.

MEDKON Line CEO Mahmut Işık emphasized that TURKON Holding is managed by people whom he respects and loves very much, and that they have taken a joint venture step for the first time. At the statement he gave about the

partnership to the Shipping Magazine, Işık stated that they made a lot of calculations in order to be permanent in their path and that Alkın Kalkavan was very prudent at this point. "We took the step of such a collaboration by purchasing another ship in the same size and taking care to avoid any disruption in the regions we will visit with two sister ships," he said.

Işık said: "We are very excited about this partnership. We hope that more Turkish companies will come together in the future and new collaborations will be made, but we are really excited that two companies collaborate for the first time and establish a joint venture service, that is, jointly manage a service, plus there are regular trips where both companies go out of the process for the first time. Both Turkon Line and Medkon Line have very busy departures from Mersin and Iskenderun. People who make the same exports in our regions sell goods to Jordan and Jeddah, and to various regions through Jeddah. Therefore, the fact that there was no return via Suez or the Red Sea due to the Houthis, and that there was no regular route or voyage there, made exporters suffer a lot. They also requested a regular line from us. We evaluated this and decided to move forward together with Turkon Line. Our line is going very well right now."

Meanwhile, Mahmut Işık stated that they launched their third ship and that weekly services were carried out regularly. He said: "It is clear at what time and where the ships will be, and in order not to cause trouble for anyone, we purchase windows, at the cost, and determine at what time and on what date we will dock

at the port. We did not want to have any problems, especially in Mersin Port. We apply this both in domestic and foreign ports. This way, no problems occur. We handle it internally, without creating any additional cost for the exporter."

Emphasizing that they offer a regular service to exporters, Medkon Lines CEO Mahmut Işık said; "Both we and Turkon Line were already implementing this organization on our own lines, now we have created a very good service in coordination together".

As for their other goals in the coming period, Mahmut Işık said: "We are in constant talks with Turkon and other Turkish companies. We would like to cooperate with different companies like us, which are called niche, including Arkas, and even with Akkon Lines if they join. We currently have a joint service with Admirel. It is very possible to move forward by making better collaborations with Admirel, Arkas and Turkon Line, where we are all together or several lines come together to reach more distant destinations. Because you cannot increase the revenue, the market determines the freight. But in order to minimize your expenses, more niche lines should do what all global lines do together. Due to the significant increases in expenses during the pandemic period, many companies continued with mergers. Currently, all the Chinese companies make three companies as one company. What does this do? As much as it is beneficial for the lines, it is also beneficial for the exporters and importers. It is because you provide much more regular and more frequent service."





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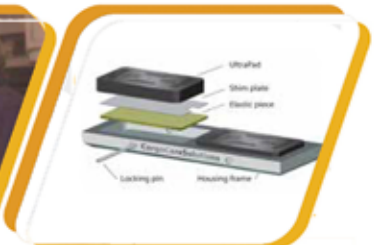
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