2017
MARITIME SECTOR REPORT

İSTANBUL 2018

İstanbul & Marmara, Agean, Mediterranean, Blacksea Regions

TURKISH CHAMBER OF SHIPPING

TURKISH CHAMBER OF SHIPPING

İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

MARITIME SECTOR REPORT 2017

İ S T A N B U L – 2018

FOREWORD

The "TURKISH SHIPPING SECTOR REPORT 2017" has been prepared within the framework of authority and responsibility granted by paragraphs No.12 and No.19 of Law No. 5174. The report covers quantitative facts and their analysis as of 31.12.2017 and is presented to our members, Turkish and foreign institutions.

The Report mainly contains eight chapters:

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

Second chapter includes the cargoes transported by Merchant Fleet in 2017. The developments of sabotage and foreign trade cargoes, the progress of seaborne trade by flags have been explained in detail. Within this chapter, transported cargoes by types, seaborne trade to OECD countries, BSEC and EU countries have been taken into consideration.

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

Fourth chapter covers Turkish Ports and the amount of cargo handled in 2017 and yearly developments.

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

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

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

Eighth chapter explains the maritime training affairs in Turkey.

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

Tamer KIRAN

Chairman of the Executive Committee

TURKISH CHAMBER OF SHIPPING

İstanbul & Marmara, Aegean, The Mediterranean, Black Sea Regions Chamber of Shipping, briefly called Turkish Chamber of Shipping (TCS), is an important professional organization of the Turkish Maritime Sector, with its headquarters in İstanbul and main branch offices in Izmir, Bodrum, Marmaris, Antalya, İskenderun, Fethiye, Karadeniz Ereğli and Kocaeli. Turkish Chamber of Shipping which has 16 Representations in Turkey was first established as İstanbul Chamber of Shipping in 1982 and afterwards its area of activities has been extended gradually so as to cover the regions of the Sea of Marmara, the Aegean Sea coast, the Mediterranean coast the Black Sea coast and finally inland waters of Turkey.

◈ ITS AIMS AND ACTIVITIES

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

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

◈ ITS MEMBERS

Turkish Chamber of Shipping has more than 9350 Members. In accordance with the Law No: 5174 concerning The Union of Chambers and Commodity Exchanges of Turkey (TOBB) every Company performing activities in the field of Maritime Shipping has to become a Member of the Turkish Chamber of Shipping. Among the members of the Turkish Chamber of Shipping are; ship-owners, ship operators, ship agents, ship sale and purchase brokers, forwarders, stevedores, tally firms, classification societies, marine insurance companies, underwriters, marine surveyors and experts, auxiliary services such as salvage, rescue, pilotage, dredging and yachting and also ship chandlers and suppliers, port and marina operators, ship-yacht builders and shipyards, ship-yacht equipment and repair services, maritime training companies, sand extractors and fishermen. The Members of The Turkish Chamber of Shipping have been gathered in 48 Professional Committees, according to their fields of occupation.

◆ THE NATIONAL AND INTERNATIONAL ORGANIZATIONS OF WHICH OUR CHAMBER IS A MEMBER

National Organizations:

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

International Organizations:

The International Chamber of Shipping (ICS), The International Chamber of Commerce – International Maritime Bureau (ICC-IMB), The Federation of National Associations of Ship Brokers and Agents (FONASBA), The European Community Association of Ship Brokers and Agents (ECASBA), The Baltic and International Maritime Council (BIMCO), The Turkish American Chamber of Commerce and Industry (TACCI), The Yacht Harbour Association (TYHA), The European Boating Association (EBA), The International Bunker Industry Association (IBIA), The European Shortsea Network (ESN) ve The Turkish - German Chamber of Commerce and Industry (TD-IHK).

◆ ITS PUBLICATIONS

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

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CHAPTER I

THE DEVELOPMENT OF TURKISH SHIPPING

The Turkish Merchant Fleet

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

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

Number and tonnage evaluations have been shown totally as of 31 December 2017

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

The Examination of the Turkish Merchant Fleet by Number and Tonnage

A general examination of the merchant fleet has been made according to number, tonnage, import and build in Turkey. Table 1 shows that, Turkish merchant fleet consists of 545 ships of which, 283 ships (6.1 million DWT) have been acquired by importation and 262 ships (1.5 million DWT) have been built in Turkey.

The distribution of 545 ships by their types includes; 33,04% dry cargo ships, 11.56% bulk carriers, 9,91% chemical tankers, 9,91% containers and 6,61% service ships, 28,97% other types of ships.

The fleet (by DWT) consists of; 37,23% bulk carriers, 23,01% oil tankers, 12,73% dry cargo ships, 14% containers, 5,88% chemical tankers and 6.61% other types of ships.

By DWT, 7,82 % of our fleet is registered in the National Ship Registry, 92,18% of fleet is registered in the International Ship Registry. By GT, 12,55% of our fleet is registered in the National Ship Registry, 87,45% of the fleet is registered in the International Ship Registry. (Table 2)

The fleet registered in the International Ship Registry (7 Million Dwt) is composed of; bulk carriers (37,99%), oil tankers (24,81%), dry cargo vessels (13,06%), container ships (10,89%), chemical tankers (6,24%) and other types of ships (7,01%). (Table 2)

Table 2 shows Turkish merchant fleet which consists of 545 ships. 15,41% of total fleet (84 ships) is registered in the National Ship Registry and 84,59% of total fleet (461 ships) is registered in the International Ship Registry.

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Table (1): The General Examination Of The Turkish Merchant Fleet By Number and Tonnage According To Import and Build (1000 GT and Over)

SHIP TYPES	COUNT				DWT				GT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
DRY CARGO	51	129	180	33,04	379.590	591.222	970.812	12,73	265.311	371.967	637.278	11,12
BULK CARRIER	58	5	63	11,56	2.689.703	150.971	2.840.674	37,23	1.542.058	94.380	1.636.438	28,56
CONTAINERS	40	14	54	9,91	858.008	210.166	1.068.174	14	689.013	160.502	849.515	14,82
DRY CARGO/CONTAINERS	4	10	14	2,57	12.369	91.903	104.272	1,37	8.066	64.411	72.477	1,26
CHEMICAL TANKERS	26	28	54	9,91	271.321	177.220	448.541	5,88	174.039	117.867	291.906	5,09
LPG TANKERS	6	0	6	1,1	33.803	0	33.803	0,44	32.103	0	32.103	0,56
ASPHALT TANKERS	1	2	3	0,55	2.770	39.896	42.666	0,56	1.900	31.348	33.248	0,58
RO-RO SHIPS	21	0	21	3,85	230.032	0	230.032	3,02	547.055	0	547.055	9,54
RO-RO / PASSENGER	11	4	15	2,75	38.710	0	38.710	0,51	95.798	13.661	109.459	1,91
FERRY BOATS	8	24	32	5,87	2.538	22.413	24.951	0,33	34.702	30.890	65.592	1,14
TRAIN FERRIES	0	6	6	1,1	0	2.960	2.960	0,04	0	9.835	9.835	0,17
PASSENGER AND CARGO SHIP	1	7	8	1,47	1.540	3.447	4.987	0,07	4.701	23.353	28.054	0,49
FISHING BOATS	1	0	1	0,18	569	0	569	0,01	1.407	0	1.407	0,02
SCIENTIFIC RESEARCH VESSEL	4	2	6	1,1	3.580	4.200	7.780	0,1	28.474	7.358	35.832	0,63
HARBOUR FERRIES	1	0	1	0,18	0	0	0	0	1.043	0	1.043	0,02
HARBOUR CAR FERRIES	0	6	6	1,1	0	1.974	1.974	0,03	0	7.547	7.547	0,13
TUGS	1	0	1	0,18	0	0	0	0	1.565	0	1.565	0,03
SERVICE SHIPS	25	11	36	6,61	37.416	0	37.416	0,49	216.220	29.803	246.023	4,29
OIL TANKERS	13	11	24	4,4	1564743	190539	1755282	23,01	829.266	101860	931.126	16,25
TRAIN FERRIES/RO-RO	1	0	1	0,18	6.266	0	6.266	0,08	15.195	0	15.195	0,27
MARINE VEHICLES	10	3	13	2,39	8.000	0	8.000	0,1	172.660	6.285	178.945	3,12
TOTAL:	**283**	**262**	**545**	**100%**	**6.140.958**	**1.486.911**	**7.627.869**	**100%**	**4.660.576**	**1.071.067**	**5.731.643**	**100%**

Source: Turkish Chamber of Shipping - 2017

Table (2): The General Examination Of The Turkish Merchant Fleet By National and International Registries (1000 GT and Over)												
SHIP TYPES	COUNT				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
DRY CARGO	12	168	180	33,04	52.735	918.077	970.812	12,73	35.703	601.575	637.278	11,12
BULK CARRIER	7	56	63	11,56	169.296	2.671.378	2.840.674	37,23	107.000	1.529.438	1.636.438	28,56
CONTAINERS	11	43	54	9,91	302.781	765.393	1.068.174	14	243.031	606.484	849.515	14,82
DRY CARGO/CONTAINERS	1	13	14	2,57	2.356	101.916	104.272	1,37	1.720	70.757	72.477	1,26
CHEMICAL TANKERS	2	52	54	9,91	9.497	439.043	448.540	5,88	6.441	285.465	291.906	5,09
LPG TANKERS	0	6	6	1,1	0	33.803	33.803	0,44	0	32.103	32.103	0,56
ASPHALT TANKERS	1	2	3	0,55	2.770	39.896	42.666	0,56	1.900	31.348	33.248	0,58
RO-RO SHIPS	0	21	21	3,85	0	230.032	230.032	3,02	0	547.055	547.055	9,54
RO-RO / PASSENGER	4	11	15	2,75	13.478	25.232	38.710	0,51	63.089	46.370	109.459	1,91
FERRY BOATS	1	31	32	5,87	2.314	22.638	24.952	0,33	1.596	63.996	65.592	1,14
TRAIN FERRIES	6	0	6	1,1	2.960	0	2.960	0,04	9.835	0	9.835	0,17
PASSENGER AND CARGO SHIP	3	5	8	1,47	3.761	1.226	4.987	0,07	17.189	10.865	28.054	0,49
FISHING BOATS	0	1	1	0,18	0	569	569	0,01	0	1.407	1.407	0,02
SCIENTIFIC RESEARCH VESSEL	0	6	6	1,1	0	7.780	7.780	0,1	0	35.832	35.832	0,63
HARBOUR FERRIES	0	1	1	0,18	0	0	0	0	0	1.043	1.043	0,02
HARBOUR CAR FERRIES	0	6	6	1,1	0	1.974	1.974	0,03	0	7.547	7.547	0,13
TUGS	1	0	1	0,18	0	0	0	0	1.565	0	1.565	0,03
SERVICE SHIPS	27	9	36	6,61	24.051	13.365	37.416	0,49	191.376	54.646	246.022	4,29
OIL TANKERS	3	21	24	4,4	10.868	1.744.415	1.755.283	23,01	5.940	925.186	931.126	16,25
TRAIN FERRIES/RO-RO	0	1	1	0,18	0	6.266	6.266	0,08	0	15.195	15.195	0,27
MARINE VEHICLES	5	8	13	2,39	0	8.000	8.000	0,1	33.199	145.746	178.945	3,12
TOTAL:	**84**	**461**	**545**	**100%**	**596.867**	**7.031.003**	**7.627.870**	**100%**	**719.584**	**5.012.058**	**5.731.642**	**100%**

Source: Turkish Chamber of Shipping - 2017

The majority of the fleet registered in the National Ship Registry (596.867 DWT) is composed of container ships (50,73%), bulk carrier ships (28,36%), dry cargo ships (8,84%), service ships (4,03%), Ro-Ro Ferry-Passenger (2,26%) and other types of ships (5,78%).

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

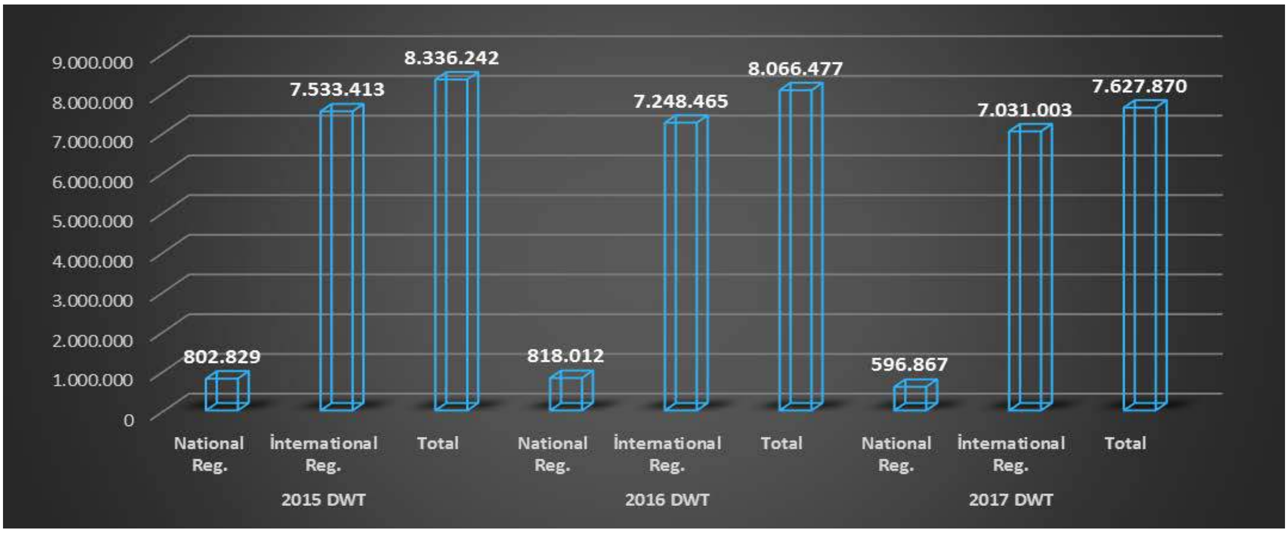


Table (3): Examination of Registries (Dwt) 2015-2016-2017 (1000 GT and over)

SHIP TYPES	2015 DWT			2016 DWT			2017 DWT			Years 2016-2017% Change
	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	
DRY CARGO	76.368	1.099.945	1.176.313	52.735	978.412	1.031.147	52.735	918.077	970.812	-5,9%
BULK CARRIERS	456.118	3.604.146	4.060.264	456.118	3.457.058	3.913.176	169.296	2.671.378	2.840.674	-27,4%
CONTAINERS	224.283	739.929	964.212	263.540	712.954	976.494	302.781	765.393	1.068.174	9,4%
DRY CARGO/CONTAINERS	2.356	120.955	123.311	2.356	120.967	123.323	2.356	101.916	104.272	-15,4%
CHEMICAL TANKERS	1.638	425.645	427.283	1.638	463.289	464.927	9.497	439.043	448.540	-3,5%
LPG TANKERS	0	39.389	39.389	0	39.389	39.389	0	33.803	33.803	-14,2%
ASPHALT TANKERS	2.770	39.936	42.706	2.770	39.896	42.666	2.770	39.896	42.666	0,0%
RO-RO SHIPS	0	232.089	232.089	0	232.089	232.089	0	230.032	230.032	-0,9%
RO-RO/PASSERGER	0	18.471	18.471	0	25.197	25.197	13.478	25.232	38.710	53,6%
FERRY BOATS	2.314	19.442	21.756	2.314	24.428	26.742	2.314	22.638	24.952	-6,7%
TRAIN FERRIES	1.660	0	1.660	1.660	0	1.660	2.960	0	2.960	78,3%
PASSENGER AND CARGO SHIPS	3.761	9.742	13.503	3.761	1.226	4.987	3.761	1.226	4.987	0,0%
FISHING BOATS	0	569	569	0	569	569	0	569	569	0,0%
SCIENTIFIC RESEARCH VESSEL	0	5.990	5.990	0	5.990	5.990	0	7.780	7.780	29,9%
HARBOUR FERRIES	0	0	0	0	0	0	0	0	0	0,0%
HARBOUR CAR FERRIES	441	6.291	6.732	0	3.536	3.536	0	1.974	1.974	-44,2%
TUGS	0	2.028	2.028	0	979	979	0	0	0	-100,0%
SERVICE SHIPS	24.051	4.048	28.099	24.051	7.970	32.021	24.051	13.365	37.416	16,8%
OIL TANKERS	7.069	1.158.532	1.165.601	7.069	1.128.250	1.135.319	10.868	1.744.415	1.755.283	54,6%
TRAIN FERRY/RO-RO	0	6.266	6.266	0	6.266	6.266	0	6.266	6.266	0,0%
MARINE VEHICLES	0	0	0	0	0	0	0	8.000	8.000	-
TOTAL:	**802.829**	**7.533.413**	**8.336.242**	**818.012**	**7.248.465**	**8.066.477**	**596.867**	**7.031.003**	**7.627.870**	**-5,4%**

Source: Turkish Chamber of Shipping - 2017

The Age Profile of the Turkish Merchant Fleet

Table 4 shows the average age profile of the Turkish Merchant Fleet according to ship types, number of ships and tonnage ranges. The Merchant Fleet of 1.000 GT and above comprises of 545 ships. The average age of these ships is 26.90 as of 31.12.2017.

The average age of dry cargo ships is 26 which consists 12.72% of the fleet. The average age bulk carriers is 16 which consists 37,24% of the fleet. The average age of containers is 15, which consists 14% the fleet. The average age of chemical tankers is 17 which consists 5.88% the fleet. The average age of oil tankers is 14 which consists 23,01% of the fleet.

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

SHIP TYPES	Number	Tonnage (DWT)	Tonnage (GT)	Ave. Age
DRY CARGO	180	970.812	637.278	26
BULK CARRIERS	63	2.840.674	1.636.438	16
CONTAINERS	54	1.068.174	849.515	15
DRY CARGO/CONTAINERS	14	104.272	72.477	20
CHEMICAL TANKERS	54	448.540	291.906	17
LPG TANKERS	6	33.803	32.103	23
ASPHALT TANKERS	3	42.666	33.248	14
RO-RO SHIPS	21	230.032	547.055	15
RO-RO/PASSERGER	15	38.710	109.459	24
FERRY BOATS	32	24.952	65.592	21
TRAIN FERRIES	6	2.960	9.835	44
PASSENGER AND CARGO SHIPS	8	4.987	28.054	26
FISHING BOOT	1	569	1.407	44
SCIENTIFIC RESEARCH VESSEL	6	7.780	35.832	20
HARBOUR FERRIES	1	0	1.043	66
HARBOUR CAR FERRIES	6	1.974	7.547	24
TUGS	1	0	1.565	34
SERVICE SHIPS	36	37.416	246.023	35
OIL TANKERS	24	1.755.283	931.126	14
TRAIN FERRIES/RO-RO	1	6.266	15.195	39
MARINE VEHICLE	13	8.000	178.945	28
TOTAL:	**545**	**7.627.870**	**5.731.642**	**26,90**

Source: Turkish Chamber of Shipping-2017

Table 5 shows the Turkish Merchant Fleet by age and tonnage ranges. Turkish Merchant Fleet consists of 545 ships of 7.627.870 DWT.

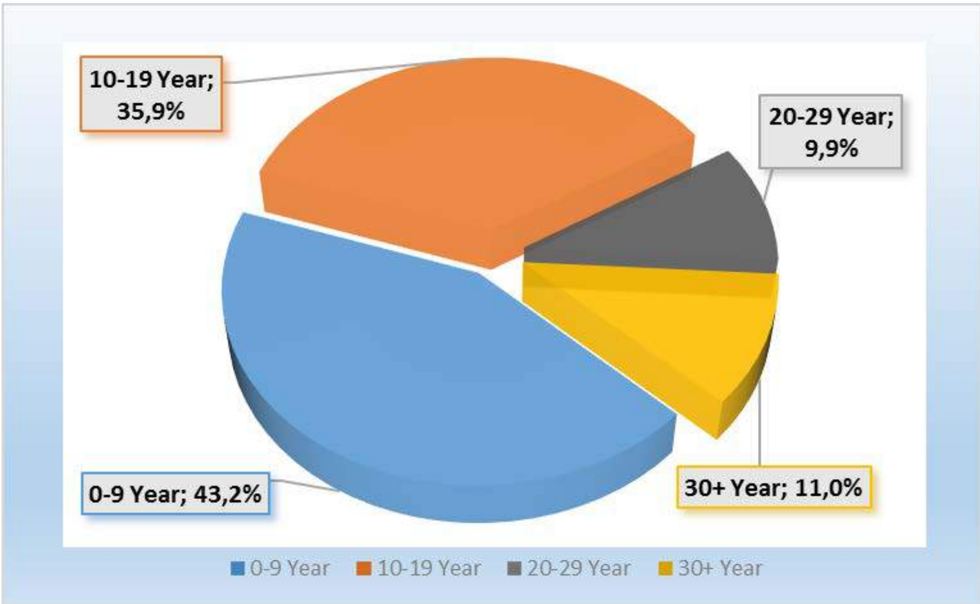
- 115 ships of 3.298.970 DWT are in between 0-9 age range,
- 154 ships of 2.738.376 DWT are in between 10-19 age range,
- 95 ships of 752.687 DWT are in between 20-29 age range,
- 181 ships of 837.837 DWT are in 30 years and over.

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

DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL		
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%
150-1499	22	1.223	6,17	17	5.560	28,04	16	4.949	24,95	45	8.100	40,84	100	19.832	100%
1500-5999	19	74.888	9,73	46	189.517	24,63	45	163.454	21,24	101	341.619	44,4	211	769.478	100%
6000-9999	12	90.433	16,78	27	207.225	38,46	15	119.988	22,27	17	121.167	22,49	71	538.813	100%
10000-34999	33	621.218	31,08	43	797.491	39,89	14	213.394	10,67	18	366.952	18,36	108	1.999.055	100%
35000-52999	3	122.135	14,04	13	568.770	65,4	4	178.731	20,55	0	0	0	20	869.636	100%
53000-79999	14	870.037	77,93	3	174.286	15,61	1	72.171	6,46	0	0	0	18	1.116.494	100%
80000-119999	5	434.611	100	0	0	0	0	0	0	0	0	0	5	434.611	100%
120000+	7	1.084.424	57,68	5	795.526	42,32	0	0	0	0	0	0	**12**	1.879.950	100%
TOTAL:	**115**	**3.298.970**	43,25	**154**	**2.738.376**	35,9	**95**	**752.687**	9,87	**181**	**837.837**	10,98	**545**	**7.627.870**	100%

Source: Turkish Chamber of Shipping - 2017

Graph (2): Turkish Merchant Fleet Distribution by Age Groups DWT %



The graph shows the age groups of the fleet. 43,2% of the fleet are between 0-9 age range, 35,9% of the fleet are in between 10-19 age range, 9,9% of the fleet are in between 20-29 age range and 11% are 30 years and over.

The tables below show the age profile of the Turkish mercant fleet according to the tonnage ranges and ship types, dry cargo ships, bulk carriers, oil tankers, chemical tankers, containers and Ro-Ro by age and tonnage ranges.

Table 6 shows the Dry Cargo segment (180 ships) which is 970.812 DWT.

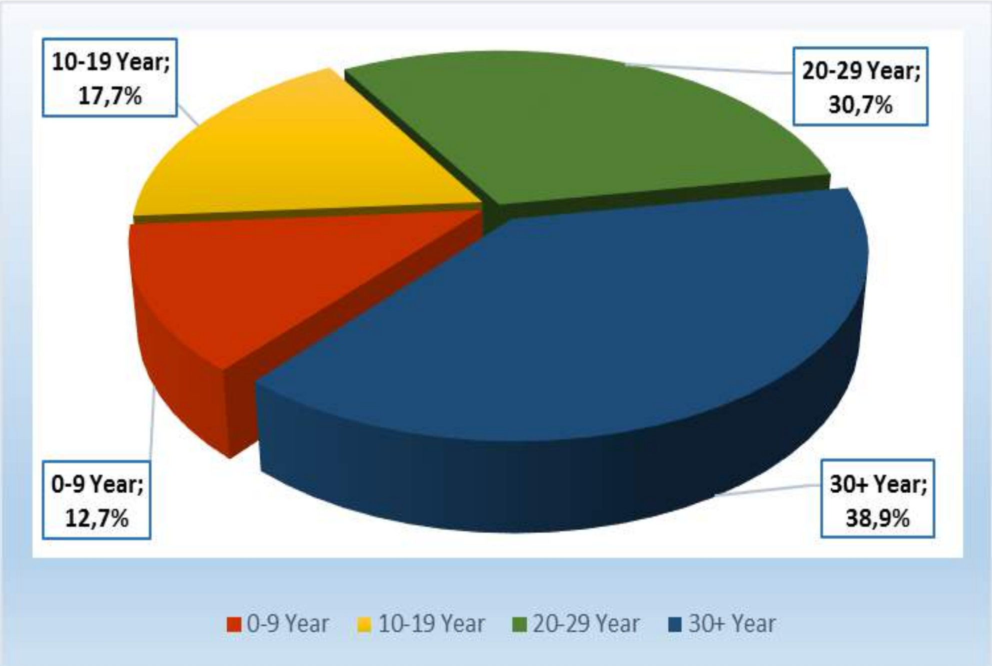
- 17 ships of 123.116 DWT are in between 0-9 age range,
- 33 ships of 171.584 DWT are in between 10-19 age range,
- 48 ships of 298.403 DWT are in between 20-29 age range,
- 82 ships of 377.710 DWT are 30 years and over.

Table (6) Dry Cargo Ships by Tonnage and Age Groups (Dwt) (1000 GT and Over)

DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
1500-5999	10	46.947	38,13%	22	92.620	53,98%	38	136.164	45,63%	67	228.095	60,39%	137	503.826
6000-9999	3	21.445	17,42%	11	78.964	46,02%	7	54.988	18,43%	10	70.468	18,66%	31	225.865
10000-34999	4	54.724	44,45%	0	0	0,00%	1	10.560	3,54%	5	79.147	20,95%	10	144.431
35000-52999	0	0	0,00%	0	0	0,00%	2	96.691	32,40%	0	0	0,00%	2	96.691
53000-79999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
80000-119999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
120000+	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
TOTAL:	**17**	**123.116**	100,00%	**33**	**171.584**	100,00%	**48**	**298.403**	100,00%	**82**	**377.710**	100,00%	**180**	**970.812**

Source: Turkish Chamber of Shipping - 2017

Graph (3): Age Distribution of Dry Cargo Segment DWT %



12,7% of Dry Cargo Ships are in between 0-9 age range, 17,7% are in between 10-19 age range, 30,7% are in between 20-29 age range, 38,9% are 30 years and over.

Table 7 shows the bulk carrier segment (63 ships) which is 2.840.674 DWT.

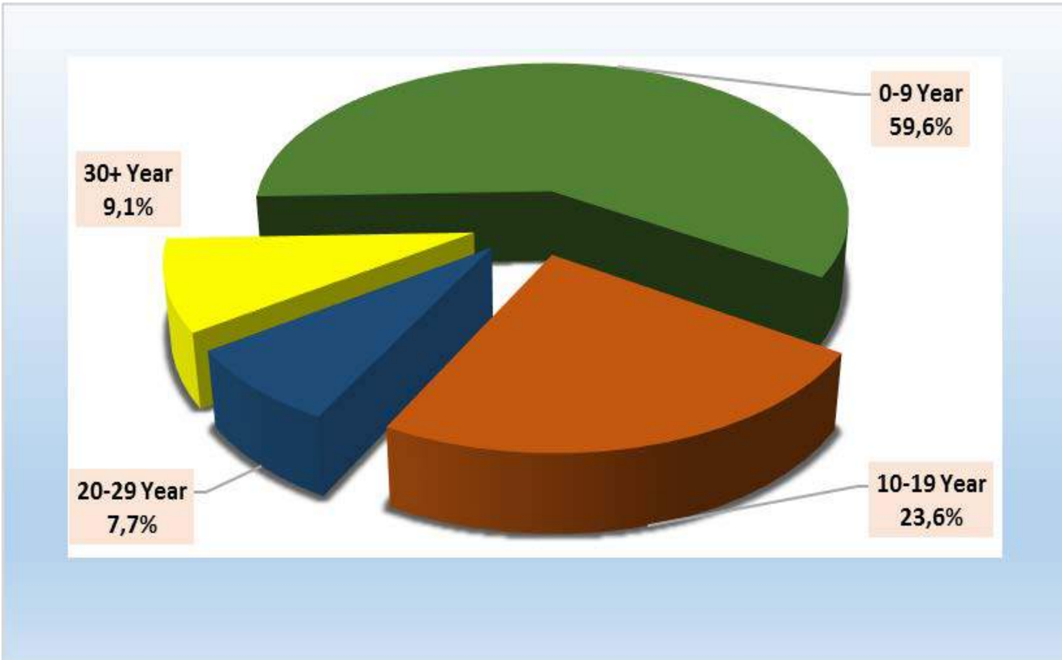
- 28 ships of 1.693.210 DWT are in between 0-9 age range,
- 17 ships of 670.482 DWT are in between 10-19 age range,
- 7 ships of 217.209 DWT are in between 20-29 age range,
- 11 ships of 259.773 DWT are in 30 years and over.

Table (7) Bulk Carrier Ships by Tonnage and Age Groups (Dwt) (1000 GT and Over)

DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
1500-5999	0	0	0,00%	0	0	0,00%	1	4.468	2,06%	0	0	0,00%	1	4.468
6000-9999	1	6.635	0,39%	0	0	0,00%	0	0	0,00%	0	0	0,00%	1	6.635
10000-34999 (HandySize)	5	142.061	8,39%	7	155.575	23,20%	3	58.530	26,95%	11	259.773	100,00%	26	615.939
35000-52999 (HandyMax)	2	70.603	4,17%	7	340.621	50,80%	2	82.040	37,77%	0	0	0,00%	11	493.264
53000-79000 (Panamax)	14	870.037	51,38%	3	174.286	25,99%	1	72.171	33,23%	0	0	0,00%	18	1.116.494
80000-119999 (CapeSize)	5	434.611	25,67%	0	0	0,00%	0	0	0,00%	0	0	0,00%	5	434.611
120000 + (Large Size)	1	169.263	10,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	1	169.263
TOTAL:	**28**	**1.693.210**	100,00%	**17**	**670.482**	100,00%	**7**	**217.209**	100,00%	**11**	**259.773**	100,00%	**63**	**2.840.674**

Source: Turkish Chamber of Shipping - 2017

Graph (4): Age Distribution of Bulk Carriers DWT %



59,6% of the bulk carriers are in between 0-9 age range, 23,6% are in between 10-19 age range, 7,7% are 20-29 in between age range and 9,1% are 30 years and over.

Table 8 shows oil tankers segment (24 ships) which is 1.755.283 DWT

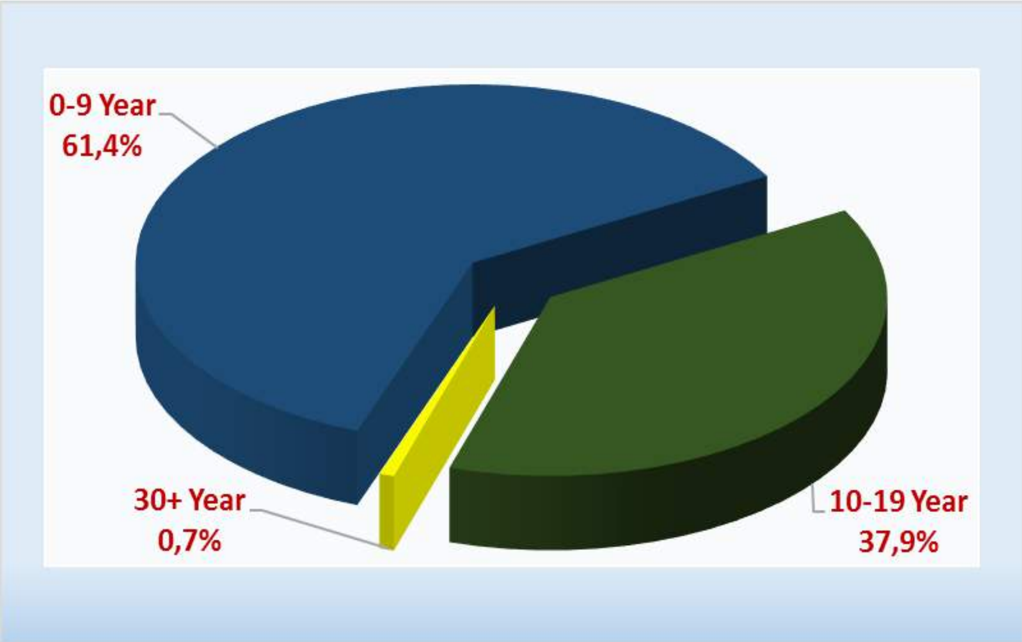
- 11 ships of 1.077.240 DWT are in between 0-9 age range,
- 9 ships of 665.437 DWT are in between 10 -19 age range,
- 4 ships of 12.605 DWT are in 30 years and over.

Table (8):Oil Tankers by Tonnage and Age Groups (Dwt) (1000 GT and Over)

DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
1500 - 5999	4	11.534	1,07%	5	20.456	3,07%	0	0	0,00%	4	12.605	100,00%	13	44.595
6000 - 19999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
20000 - 49999 (Product Tanker)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
50000 - 79999 (Panamax)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
80000 - 109999 (Aframax)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
110000 - 164999 (Suezmax)	7	1.065.706	98,93%	4	644.981	96,93%	0	0	0,00%	0	0	0,00%	11	1.710.687
165000 - 299999 (VLCC)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
300000 + (ULCC)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
TOTAL:	**11**	**1.077.240**	100,00%	**9**	**665.437**	100,00%	**0**	**0**	0,00%	**4**	**12.605**	100,00%	**24**	**1.755.283**

Source: Turkish Chamber of Shipping - 2017

Graph (5): Age Distribution of Oil Tankers DWT %



61,4% of the oil tankers are in 0-9 age range, 37,9% are in 10-19 age range and 0,7% are 30 years and over.

Table 9 shows the average age of the chemical tankers (54 ships) which are 448.540 DWT.

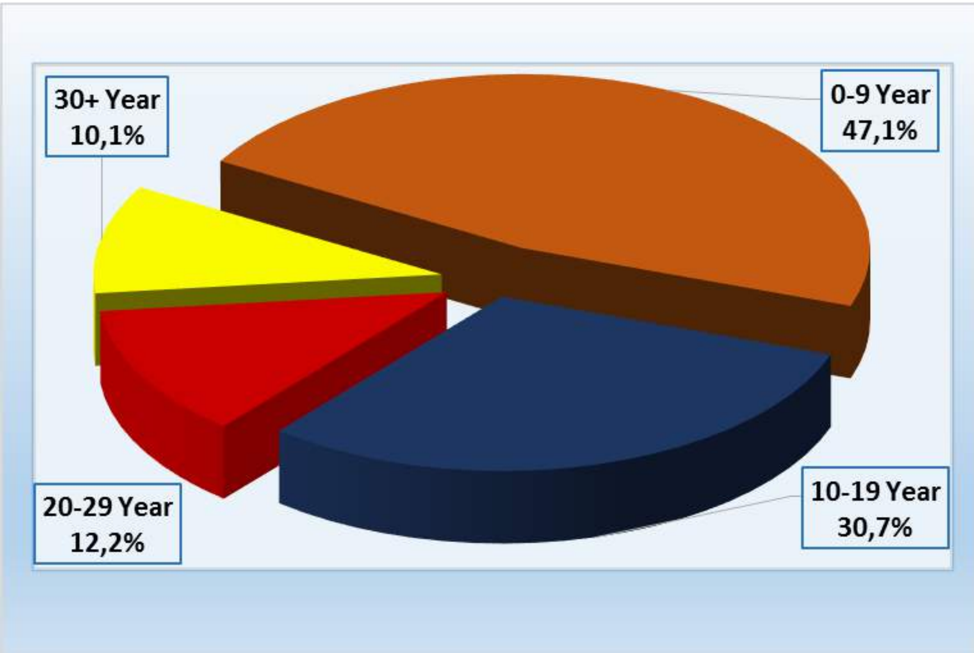
- 20 ships of 211.051 DWT are in between 0-9 age range,
- 17 ships of 137.505 DWT are in between 10-19 age range,
- 9 ships of 54.810 DWT are in between 20-29 age range,
- 8 ships of 45.174 DWT are 30 years and over.

Table (9): Chemical Tankers by Tonnage and Age Groups (Dwt) (1000 GT and Over)

DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150 - 1499	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
1500 - 5999	5	16.451	7,79%	11	46.637	33,92%	4	18.215	33,23%	4	13.717	30,36%	24	95.020
6000 - 19999	14	143.068	67,79%	5	50.869	36,99%	5	36.595	66,77%	4	31.457	69,64%	28	261.989
20000 - 49999 (Product Tanker)	0	0	0,00%	1	39.999	29,09%	0	0	0,00%	0	0	0,00%	1	39.999
50000 - 79999 (Panamax)	1	51.532	24,42%	0	0	0,00%	0	0	0,00%	0	0	0,00%	1	51.532
80000 - 109999 (Aframax)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
110000 - 164999 (Suezmax)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
165000 - 299999 (VLCC)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
300000 + (ULCC)	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
TOTAL:	**20**	**211.051**	100,00%	**17**	**137.505**	100,00%	**9**	**54.810**	100,00%	**8**	**45.174**	100,00%	**54**	**448.540**

Source: Turkish Cahmber of Shipping - 2017

Graph (6): Age Distribution of Chemical Tankers DWT %



47,1% of other type of tankers are in between 0-9 age range, 30,7% are in between 10-19 age range, 12,2% are in between 20-29 age range and 10,1% are 30 years and over.

Table 10 shows the average age of the container ships (54 ships) which are 1.068.174 DWT.

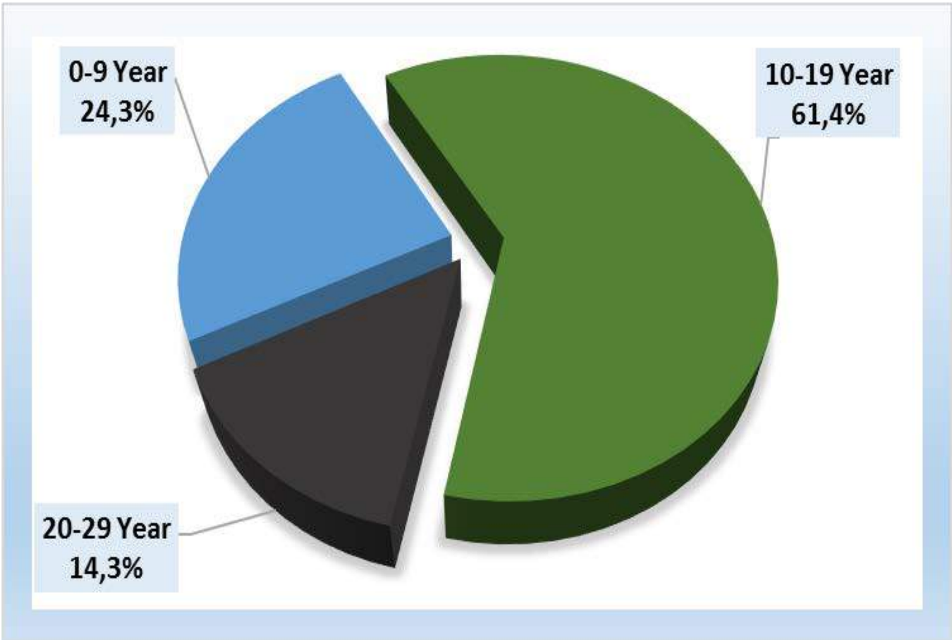
- 10 ships of 259.288 DWT are in between 0-9 age range,
- 32 ships of 656.402 DWT are in between 10-19 age range,
- 12 ships of 152.484 DWT are in between 20-29 age range,

Table (10) Container Ships by Tonnage and Age Groups (Dwt) (1000 GT and Over)

DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0	0	0
1500-5999	0	0	0,00%	1	3.301	0,50%	1	4.856	3,18%	0	0	0	2	8.157
6000-9999	0	0	0,00%	4	27.561	4,20%	3	28.405	18,63%	0	0	0	7	55.966
10000-34999	10	259.288	100,00%	22	437.390	66,63%	8	119.223	78,19%	0	0	0	40	815.901
35000-52999	0	0	0,00%	5	188.150	28,66%	0	0	0,00%	0	0	0	5	188.150
53000-79999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0	0	0
80000-119999	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0	0	0
120000+	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0	**0**	0
TOTAL:	**10**	**259.288**	100,00%	**32**	**656.402**	100,00%	**12**	**152.484**	100,00%	**0**	**0**	0	**54**	**1.068.174**

Source: Turkish Chamber of Shipping - 2017

Graph (7): Age Distribution of the Container Ships DWT %



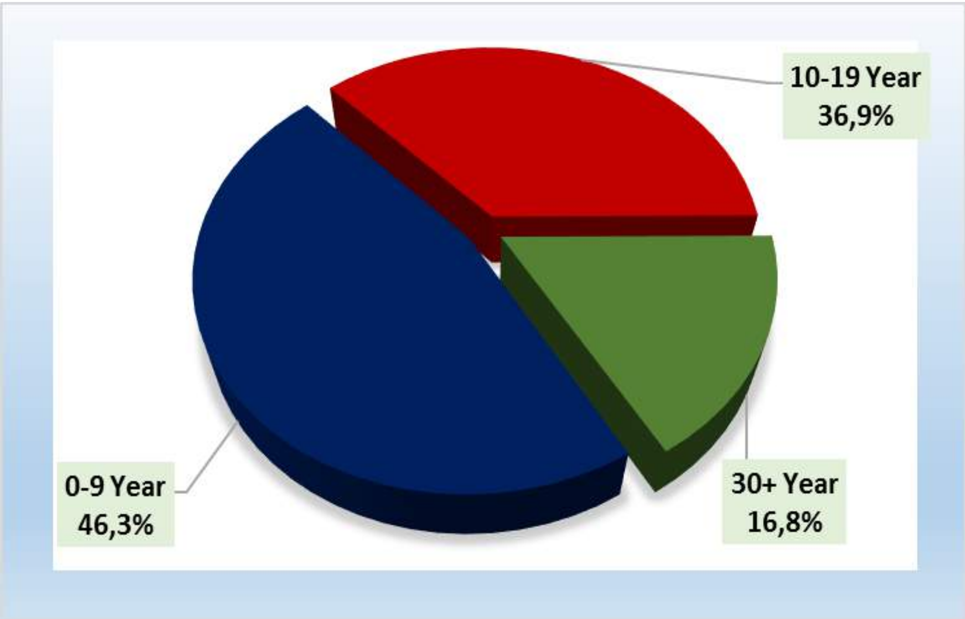
24,3% of Container ships are in between 0-9 age range, 61,4% are in between10-19 age range and 14,3% are in between 20-29 age range.

Table 11 shows the average age of the Ro-Ro Ships, (21 ships) which are 230.032 DWT.

- 9 ships of 106.504 DWT are in between 0-9 age range,
- 8 ships of 84.983 DWT are in between 10-19 age range,
- 4 ships of 38.545 DWT are 30 years and over.

Table (11) RO-RO Ships by Tonnage and Age Groups (Dwt) (1000 GT and Over)															
DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
150-1499	0	0	0,00%	0	0	0,00%	0	0	0	0	0	0,00%	0	0
1500-5999	0	0	0,00%	0	0	0,00%	0	0	0	2	10.513	27,27%	2	10.513
6000-9999	1	9.089	8,53%	4	39.111	46,02%	0	0	0	0	0	0,00%	5	48.200
10000-34999	8	97.415	91,47%	4	45.872	53,98%	0	0	0	2	28.032	72,73%	14	171.319
35000-52999	0	0	0,00%	0	0	0,00%	0	0	0	0	0	0,00%	0	0
53000-79999	0	0	0,00%	0	0	0,00%	0	0	0	0	0	0,00%	0	0
80000-119999	0	0	0,00%	0	0	0,00%	0	0	0	0	0	0,00%	0	0
120000+	0	0	0,00%	0	0	0,00%	0	0	0	0	0	0,00%	**0**	0
TOTAL:	**9**	**106.504**	100,00%	**8**	**84.983**	100,00%	**0**	**0**	0	**4**	**38.545**	100,00%	**21**	**230.032**
Source: Turkish Chamber of Shipping - 2017															

Graph (8): Age Distribution of the RO-RO Ships DWT %



46,3% of Ro-Ro Ships are in between 0-9 age range, 36,9% are in between 10-19 age range, 16,8% are 30 years and over.

Turkish Merchant Fleet by Number and Tonnage 1000 DWT and Over
(Accepted International Seaborne Transportation Tonnage)

Table 12 shows that the numerical and tonnage examination of ships which are 1000 DWT and over, are suitable for international transportation. Turkish merchant fleet consists of 545 ships, 8,3% of total fleet (80 ships) registered in National Ship Registry and 91,7% of total fleet (474 ships) registered in the International Ship Registry.

The total DWT and GT values of ships which are 1000 DWT and over are 7.795.027 DWT and 5.308.329 GT. The majority of these tonnage on DWT basis is composed of 36,45% bulk carriers, 22,93% oil tankers, 13,70% container ships, 13,56% dry cargo ships, 5,75% chemical tankers and 2,95% Ro-Ro ships. This segment consists 95,34% of the total fleet on DWT bases. (Table 13)

6% of the bulk carrier segment which is totally 2.840.674 DWT are registered in the National Ship Registry, 94% are registered in the International Ship Registry.

1,2% of the oil tankers segment which is totally 1.787.514 DWT are registered in the National Ship Registry, 98,8% are registered in the International Ship Registry.

28,3% of the container ships which is totally 1.068.174 DWT are registered in the National Ship Registry. 71,7% are registered in the International Ship Registry.

6,7% of the dry cargo segment which is totally 1.056.946 DWT are registered in the National Ship Registry, 93,3% are registered in the International Ship Registry.

2,1% of the chemical tankers segment which is totally 448.540 DWT are registered in the National Ship Registry, 97,9% are registered in the International Ship Registry.

Ro/Ro ship segment which is totally 230.032 DWT are 100% registered in International Ship Registry.

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

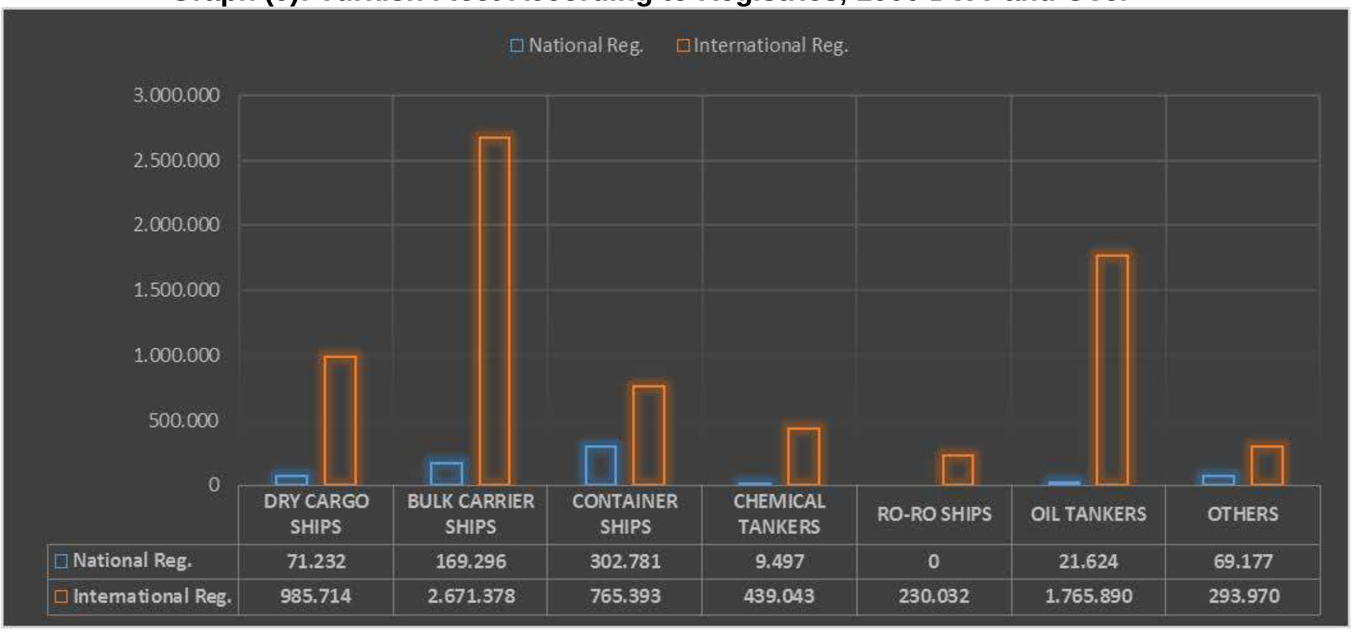


Table (12): The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to the Import and Build (1000 DWT and over)												
SHIP TYPES	COUNT				DWT				GT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
DRY CARGO	59	177	236	42,61	391.316	665.629	1.056.945	13,56	272.099	411.342	683.441	12,87
BULK CARRIER	58	5	63	11,37	2.689.703	150.971	2.840.674	36,45	1.542.058	94.380	1.636.438	30,81
CONTAINERS	40	14	54	9,75	858.008	210.166	1.068.174	13,7	689.013	160.502	849.515	16
DRY CARGO/CONTAINERS	4	10	14	2,53	12.369	91.903	104.272	1,34	8.066	64.411	72.477	1,37
CHEMICAL TANKERS	26	28	54	9,75	271.321	177.220	448.541	5,75	174.039	117.867	291.906	5,5
LPG TANKERS	6	0	6	1,08	33.803	0	33.803	0,43	32.103	0	32.103	0,6
ASPHALT TANKERS	1	2	3	0,54	2.770	39.896	42.666	0,55	1.900	31.348	33.248	0,63
WATER BARGES	0	1	1	0,18	0	1.027	1.027	0,01	0	488	488	0,01
RO-RO SHIPS	21	0	21	3,79	230.032	0	230.032	2,95	547.055	0	547.055	10,31
RO-RO / PASSENGER	8	2	10	1,81	38.253	2.727	40.980	0,53	87.433	1.974	89.407	1,68
FERRY BOATS	0	9	9	1,62	0	17.168	17.168	0,22	0	13.281	13.281	0,25
TRAIN FERRIES	0	2	2	0,36	0	2.600	2.600	0,03	0	2.466	2.466	0,05
PASSENGER AND CARGO SHIP	1	1	2	0,36	1.540	1.700	3.240	0,04	4.701	10.583	15.284	0,29
SCIENTIFIC RESEARCH VESSEL	2	1	3	0,54	3.580	4.200	7.780	0,1	21.740	2.569	24.309	0,46
SEA BUSES	1	0	1	0,18	29.642	0	29.642	0,38	431	0	431	0,01
SERVICE SHIPS	13	11	24	4,33	47.055	14.268	61.323	0,79	36.578	5.253	41.831	0,79
OIL TANKERS	19	27	46	8,3	1.573.736	213.779	1.787.515	22,93	834.836	115.709	950.545	17,91
TRAIN FERRIES/RO-RO	1	0	1	0,18	6.266	0	6.266	0,08	15.195	0	15.195	0,29
MARINE VEHICLES	2	2	4	0,72	9.085	3.295	12.380	0,16	7.316	1.593	8.909	0,17
TOTAL:	**262**	**292**	**554**	**100%**	**6.198.479**	**1.596.549**	**7.795.028**	**100%**	**4.274.563**	**1.033.766**	**5.308.329**	**100%**

Source: Turkish Chamber of Shipping-2017

Table (13) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 DWT and over)												
SHIP TYPES	COUNT				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
DRY CARGO	25	211	236	42,61	71.232	985.714	1.056.946	13,56	44.598	638.843	683.441	12,87
BULK CARRIER	7	56	63	11,37	169.296	2.671.378	2.840.674	36,45	107.000	1.529.438	1.636.438	30,81
CONTAINERS	11	43	54	9,75	302.781	765.393	1.068.174	13,7	243.031	606.484	849.515	16
DRY CARGO/CONTAINERS	1	13	14	2,53	2.356	101.916	104.272	1,34	1.720	70.757	72.477	1,37
CHEMICAL TANKERS	2	52	54	9,75	9.497	439.043	448.540	5,75	6.441	285.465	291.906	5,5
LPG TANKERS	0	6	6	1,08	0	33.803	33.803	0,43	0	32.103	32.103	0,6
ASPHALT TANKERS	1	2	3	0,54	2.770	39.896	42.666	0,55	1.900	31.348	33.248	0,63
WATER BARGES	0	1	1	0,18	0	1.027	1.027	0,01	0	488	488	0,01
RO-RO SHIPS	0	21	21	3,79	0	230.032	230.032	2,95	0	547.055	547.055	10,31
RO-RO / PASSENGER	2	8	10	1,81	13.478	27.502	40.980	0,53	52.408	36.999	89.407	1,68
FERRY BOATS	1	8	9	1,62	2.314	14.854	17.168	0,22	1.596	11.685	13.281	0,25
TRAIN FERRIES	2	0	2	0,36	2.600	0	2.600	0,03	2.466	0	2.466	0,05
PASSENGER AND CARGO SHIP	2	0	2	0,36	3.240	0	3.240	0,04	15.284	0	15.284	0,29
SCIENTIFIC RESEARCH VESSEL	0	3	3	0,54	0	7.780	7.780	0,1	0	24.309	24.309	0,46
SEA BUSES	0	1	1	0,18	0	29.642	29.642	0,38	0	431	431	0,01
SERVICE SHIPS	14	10	24	4,33	39.124	22.199	61.323	0,79	27.333	14.498	41.831	0,79
OIL TANKERS	10	36	46	8,3	21.624	1.765.890	1.787.514	22,93	12.499	938.046	950.545	17,91
TRAIN FERRIES/RO-RO	0	1	1	0,18	0	6.266	6.266	0,08	0	15.195	15.195	0,29
MARINE VEHICLES	2	2	4	0,72	3.295	9.085	12.380	0,16	1.593	7.316	8.909	0,17
TOTAL:	**80**	**474**	**554**	**100%**	**643.607**	**7.151.420**	**7.795.027**	**100%**	**517.869**	**4.790.460**	**5.308.329**	**100%**

Source: Turkish Chamber of Shipping-2017

Table (14): The Average Age Profile of the Turkish Merchant Fleet (1000 DWT and Over)				
SHIP TYPES	**Number**	**Tonnage (DWT)**	**Tonnage (GT)**	**Ave. Age**
DRY CARGO	236	1.056.946	683.440	30
BULK CARRIERS	63	2.840.674	1.636.438	16
CONTAINERS	54	1.068.174	849.515	15
DRY CARGO/CONTAINERS	14	104.272	72.477	20
CHEMICAL TANKERS	54	448.540	291.906	17
LPG TANKERS	6	33.803	32.103	23
ASPHALT TANKERS	3	42.666	33.248	14
WATER BARGES	1	1.027	488	49
RO-RO SHIPS	21	230.032	547.055	15
RO-RO/PASSERGER	10	40.980	89.407	30
FERRY BOATS	9	17.168	13.281	27
TRAIN FERRIES	2	2.600	2.466	44
PASSENGER AND CARGO SHIPS	2	3.240	15.284	57
SCIENTIFIC RESEARCH VESSEL	3	7.780	24.309	24
SEA BUSES	1	29.642	431	30
SERVICE SHIPS	24	61.323	41.831	33
OIL TANKERS	46	1.787.514	950.545	16
TRAIN FERRIES/RO-RO	1	6.266	15.195	39
MARINE VEHICLE	4	12.380	8.909	9
TOTAL:	**554**	**7.795.027**	**5.308.328**	**26,74**

Source: Turkish Chamber of Shipping-2017

Table (15) Turkish Merchant Fleet Distribution by Tonnage and Age Groups (Dwt) (1000 DWT and Over)															
DIVISIONS OF TONNAGE	0-9 YEARS			10-19 YEARS			20-29 YEARS			30+ YEARS			TOTAL	
	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT	%	No	DWT
0-149	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0	0,00%	0	0
150-1499	3	3.482	0,10%	6	8.184	0,30%	11	14.402	1,87%	45	56.389	5,84%	65	82.457
1500-5999	28	90.640	2,73%	47	191.163	6,97%	50	171.820	22,30%	129	390.746	40,50%	254	844.369
6000-9999	12	90.433	2,73%	27	207.225	7,56%	15	119.988	15,57%	17	121.167	12,56%	71	538.813
10000-34999	33	621.218	18,73%	43	797.491	29,08%	14	213.394	27,70%	19	396.594	41,10%	109	2.028.697
35000-52999	3	122.135	3,68%	13	568.770	20,74%	4	178.731	23,20%	0	0	0,00%	20	869.636
53000-79999	14	870.037	26,23%	3	174.286	6,35%	1	72.171	9,37%	0	0	0,00%	18	1.116.494
80000-119999	5	434.611	13,10%	0	0	0,00%	0	0	0,00%	0	0	0,00%	5	434.611
120000+	7	1.084.424	32,69%	5	795.526	29,01%	0	0	0,00%	0	0	0,00%	**12**	1.879.950
TOTAL:	**105**	**3.316.980**	100,00%	**144**	**2.742.646**	100,00%	**95**	**770.506**	100,00%	**210**	**964.895**	100,00%	**554**	**7.795.027**

Source: Turkish Chamber of Shipping - 2017

The Position of The Turkish Merchant Fleet Within the World Fleet

In 2018 our tonnage under foreign flags is 21,3 million DWT, as of 1 January 2018, concerning the ships of 1000 GT and above, the total tonnage of the Turkish ship-owners, both under Turkish flag and foreign flags is 28,6 million DWT.

As of the beginning of 2018, regarding the Turkish Ship Owners' ships of 1000 GT and above, 25% percent of these ships are registered under the Turkish flag and 75% are registered under the foreign flags.

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

Year	National Flag			Foreign Flag			Total Fleet Controlled		Years
	No	1000 DWT	%	No	1000 DWT	%	No	1000 DWT	Change %
1999	448	8.697	90%	69	915	10%	517	9.612	
2000	456	8.269	91%	96	855	9%	552	9.124	-5,10%
2001	445	7.321	82%	107	1.607	18%	552	8.928	-2,10%
2002	451	7.815	84%	117	1.514	16%	568	9.329	4,50%
2003	432	7.045	80%	147	1.772	20%	579	8.817	-5,50%
2004	408	6.556	75%	163	2.159	25%	571	8.715	-1,20%
2005	420	6.427	70%	237	2.725	30%	657	9.152	5,00%
2006	432	6.844	65%	353	3.609	35%	785	10.453	14,20%
2007	446	6.464	58%	424	4.650	42%	870	11.114	6,30%
2008	490	6.592	50%	513	6.591	50%	1003	13.183	18,60%
2009	520	6.736	44%	636	8.592	56%	1156	15.328	16,30%
2010	560	7.246	42%	665	9.954	58%	1225	17.200	12,20%
2011	547	7.797	40%	672	11.863	60%	1219	19.660	14,30%
2012	523	8.479	38%	642	14.093	62%	1165	22.572	14,80%
2013	627	9.488	31%	842	20.838	69%	1469	30.326	34,40%
2014	599	8.580	28%	890	21.846	72%	1489	30.426	0,30%
2015	564	8.297	30%	834	19.209	70%	1398	27.506	-9,60%
2016	551	8.272	28%	984	20.879	72%	1535	29.151	6,00%
2017	525	7.800	27%	1022	21.465	73%	1547	29.265	0,40%
2018	**483**	**7.288**	**25%**	**1028**	**21.323**	**75%**	**1511**	**28.611**	**-2,20%**

Source: ISL January-February 2018

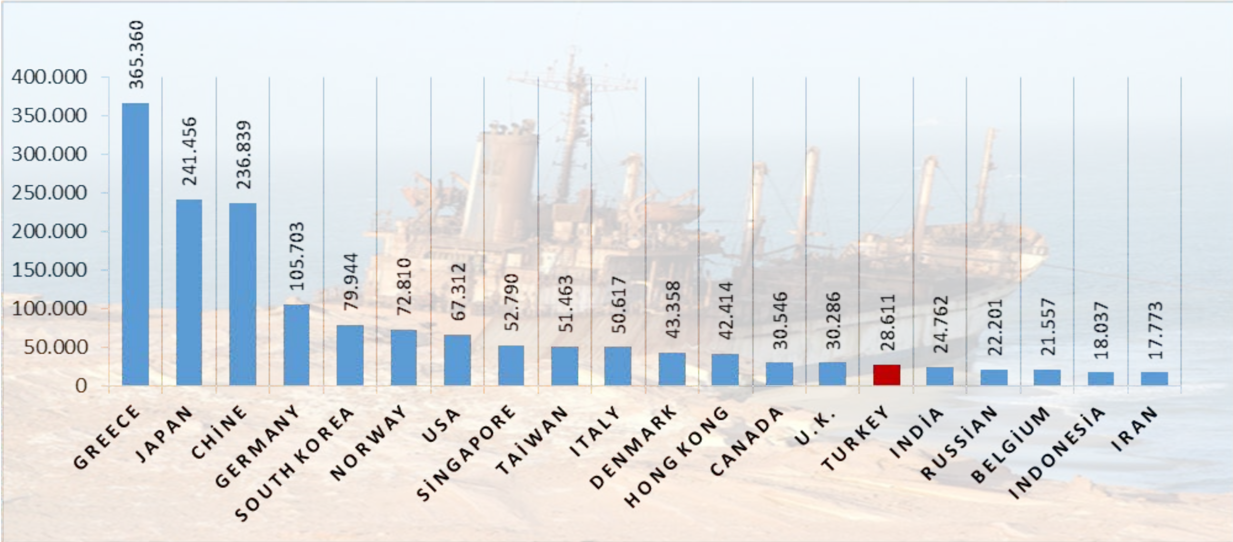
Table (17) Total Fleet of the 30 Countries by National and Foreign Flags (01 January 2017) (1000 GT and over)							
Dwt Rank	Country	National Flag		International Flag		Total Flag	
		No	1000 DWT	No	1000 DWT	No	1000 DWT
1	Greece	712	68.743	4.015	296.617	4.727	365.360
2	Japan	815	34.427	3.316	207.030	4.131	241.456
3	Chine	2.809	79.744	2.447	157.095	5.256	236.839
4	Germany	189	8.414	2.752	97.289	2.941	105.703
5	South Korea	706	12.794	908	67.150	1.614	79.944
6	Norway	525	16.730	1.167	56.080	1.692	72.810
7	USA	206	5.078	1.016	62.234	1.222	67.312
8	Singapore	711	27.185	676	25.605	1.387	52.790
9	Taiwan	109	4.432	857	47.030	966	51.463
10	Italy	460	13.090	667	37.527	1.127	50.617
11	Denmark	330	16.917	576	26.441	906	43.358
12	Hong Kong	506	28.668	476	13.746	982	42.414
13	Canada	117	1.322	384	29.224	501	30.546
14	U.K.	194	6.247	533	24.039	727	30.286
15	**Turkey**	**483**	**7.288**	**1.028**	**21.323**	**1.511**	**28.611**
16	India	630	16.699	133	8.063	763	24.762
17	Russian	1.092	6.849	363	15.352	1.455	22.201
18	Belgium	71	7.854	151	13.703	222	21.557
19	Indonesia	1.708	16.814	79	1.223	1.787	18.037
20	Iran	139	3.849	61	13.925	200	17.773
21	Saudi Arabia	119	13.235	36	3.707	155	16.942
22	France	108	3.117	190	11.725	298	14.842
23	UAE	49	303	502	14.065	551	14.369
24	Malaysia	204	6.616	126	7.597	330	14.213
25	Netherland	564	4.787	343	7.724	907	12.511
26	Bermuda	-	-	58	10.514	58	10.514
27	Switzerland	35	1.466	164	7.994	199	9.460
28	Vietnam	804	6.749	107	1.469	911	8.218
29	Oman	6	6	42	7.782	48	7.788
30	Thailand	304	5.210	74	2.530	378	7.739
Total 30 Countries		**14.705**	**424.633**	**23.247**	**1.295.803**	**37.952**	**1.720.435**
Other		2.211	33.216	2.549	68.058	4.760	101.273
Subtotal		16.916	457.849	25.796	1.363.860	42.712	1.821.709
Unknown						409	3025
World Total						**43.121**	**1.824.734**

Source: ISL January-February 2018

Table 17 shows the first 30 countries owning the largest merchant fleet in the world scale. 94% of the World fleet (1000 GT and over) of 1.8 Billion DWT, is being controlled by the following countries as of 1 January 2018.

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

Graph (10): By Country of Domicile as of 1 January 2018



The World fleet (300 GT and over) is 53.045 ships of 1.883.549.000 DWT based on 158 countries as of 01.01.2018. The position of Turkish merchant fleet is shown in the Table as being on 27th place in the World ranking.

Panama, having a share of 17,8% is in the first place, Liberia, having a share of 12,5% is in the second place, Marshall Island, having a share of 11.8% is in the third place.

Graph (11): World Merchant Fleet Ranking by Turkish Flag

Table (18) World Merchant Fleet Ranking by Flag as of 1 January 2018 (300 GT and Over)

DWT Rank 2018	(2017)	Flag	1 January 2017 No of Ships	1 January 2017 1000 GT	1 January 2017 1000 DWT	1 January 2017 1000 TEU	1 January 2018 No of Ships	1 January 2018 1000 GT	1 January 2018 1000 DWT	1 January 2018 1000 TEU	DWT % share of total
1	-1	Panama	6.480	216.522	333.363	3.214	6.395	212.134	326.118	3.132	17.8
2	-3	Marshall Islands	2.892	127.950	208.563	1.179	3.117	140.951	229.735	1.282	12.5
3	-2	Liberia	3.126	136.331	213.934	3.896	3.160	139.109	218.893	3.798	11.9
4	-4	Hong Kong (SAR)	2.420	106.744	172.420	2.702	2.462	112.401	180.585	2.932	9.8
5	-5	Singapore	2.328	80.698	121.177	2.166	2.333	82.723	124.563	2.226	6.8
6	-6	Malta	2.016	65.654	98.669	1.419	2.036	71.445	107.748	1.519	5.9
7	-7	China	3.008	47.904	74.918	686	3.224	51.855	80.288	856	4.4
8	-8	Greece	963	42.262	74.493	52	946	41.129	72.201	44	3.9
9	-9	Bahamas	1.160	53.644	68.057	199	1.133	52.571	64.788	177	3.5
10	-10	UK	757	29.002	38.896	843	767	30.671	41.854	816	2.3
11	-11	Japan	2.620	23.262	33.782	63	2.640	25.429	36.792	84	2.0
12	-12	Cyprus	797	20.864	33.000	438	811	21.544	34.112	446	1.9
13	-19	Portugal	352	10.417	13.712	644	474	14.793	19.349	945	1.1
14	-14	Indonesia	2.915	12.189	17.131	184	3.069	13.658	19.161	213	1.0
15	-13	Norway	788	15.088	19.069	57	799	14.990	18.867	60	1.0
16	-15	Denmark	460	15.002	16.940	984	480	16.778	18.715	1.180	1.0
17	-16	India	850	9.596	16.451	44	878	10.284	17.608	50	1.0
18	-17	Italy	710	15.498	15.347	128	701	15.313	14.489	127	0.8
19	-18	Korea, Rep. Of	1.045	9.859	14.654	101	1.028	9.674	13.920	107	0.8
20	-38	Saudi Arabia	102	2.451	3.619	8	137	7.592	13.451	8	0.7
21	-20	Germany	266	9.501	10.316	760	265	9.011	9.803	721	0.5
22	-22	Bermuda	140	10.432	8.999	25	140	10.306	8.653	39	0.5
23	-21	Antigua & Barbuda	921	7.781	10.089	555	810	6.505	8.505	450	0.5
24	-24	US	342	7.032	7.963	236	363	7.333	8.220	232	0.4
25	-25	Belgium	76	4.781	7.755	1	83	5.025	8.200	1	0.4
26	-26	Russia	1.441	5.960	7.580	89	1.486	6.388	7.999	100	0.4
27	-23	Turkey	**834**	**5.637**	**8.102**	**111**	**805**	**5.441**	**7.638**	**123**	**0.4**
28	-27	Viet Nam	1.351	4.451	7.306	33	1.378	4.566	7.475	38	0.4
29	-28	Malaysia	414	5.442	7.023	27	418	5.583	7.053	22	0.4
30	-30	France	193	5.493	6.627	199	195	5.534	6.772	199	0.4
31	-29	Netherlands	805	6.320	6.713	259	785	6.124	6.391	249	0.3
32	-34	Thailand	539	3.198	5.293	27	556	3.669	6.130	27	0.3
33	-33	Cayman Islands	130	3.894	5.398	1	138	4.189	6.020	1	0.3
34	-32	Philippines	906	4.036	6.062	49	948	3.860	5.611	56	0.3
35	-35	Kuwait	47	2.897	5.123	15	45	2.682	4.856	1	0.3
36	-36	Taiwan	161	3.071	4.419	137	172	3.188	4.581	142	0.2
37	-31	Iran	378	3.984	6.463	106	361	2.685	4.058	99	0.2
38	-37	Brazil	121	2.336	3.726	53	120	2.462	3.972	52	0.2
39	-41	Belize	414	1.814	2.743	19	426	1.872	2.901	17	0.2
40	-39	New Zealand	205	1.960	3.184	20	218	1.776	2.847	17	0.2
153		TOTAL	52.183	1.182.691	1.772.435	22.327	53.045	1.224.375	1.833.549	23.102	

Source: ISL January-February 2018

The Position of the Turkish Merchant Fleet Among the Fleets of the Neighboring Countries

The capacity of the merchant fleet of Turkey and the neighboring countries are shown on the following Table (19).

Greece is in the 1st place being among the largest merchant fleets of the World. Southern Cyprus is in the 2nd, Russia is in the 3rd and Turkey is in 4th place.

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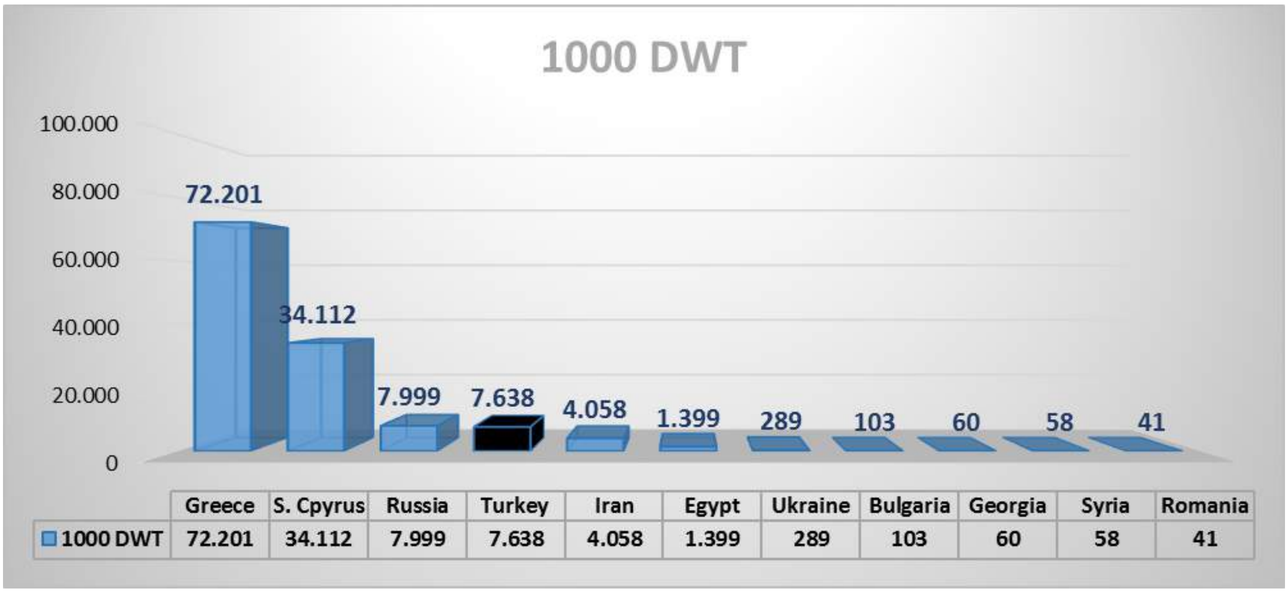
Table (19): Turkish Merchant Fleet and the Neighboring Countries (01.01.2018) (300 GT and Over)

World DWT Rank	Country	No Of Ships	1000 DWT	World %	Change %
8	Greece	946	72.201	3,90%	-3,10%
12	S. Cpyrus	811	34.112	1,90%	3,40%
26	Russia	1.486	7.999	0,40%	5,50%
27	Turkey	805	7.638	0,40%	-5,70%
37	Iran	361	4.058	0,20%	-37,20%
55	Egypt	90	1.399	0,10%	0,00%
88	Ukraine	107	289	0	1,00%
102	Bulgaria	28	103	0	-7,50%
114	Georgia	17	60	0	0,00%
115	Syria	8	58	0	0,00%
118	Romania	16	41	0	9,10%

Source: ISL January-February 2018

In addition to the national flags of neighboring countries, when ships operating under foreign flag are added to Turkey, Greece has 365 million DWT, Russia has 22 million DWT and Iran has 18 million DWT.

Graph (12): Turkish Merchant Fleet and the Neighboring Countries (01.01.2018)



CARGOES
2017

CHAPTER II

DEVELOPMENT OF TONNAGE CARRIED WORID AND TURKISH MERCHANT FLEET IN 2017

The Developments in the Transportation of Foreign Trade Cargoes

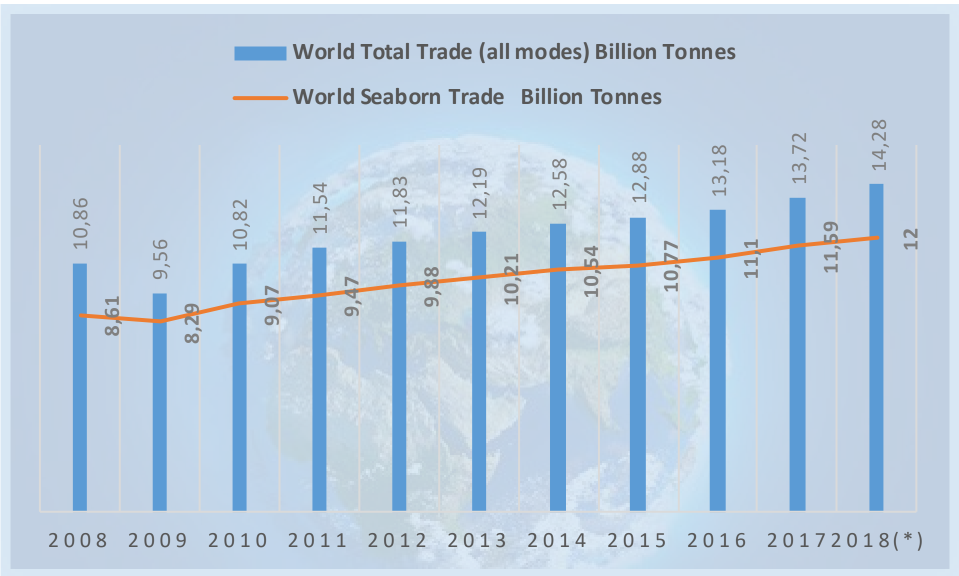
2018 is a projection. *Trends calculated using an average period up to 5-10 and including the current year, or a compound average growth rate over the period. Estimated share of total world trade in 2017 (mt): sea 85%, land (road+rail) 15%, air <1%.

Table (20): World Total Trade and World Seaborn Trade

Year	World Total Trade (all modes) Billion Tonnes	World Transport Change (%)	World Seaborn Trade Billion Tonnes	Seaborn Trade as % of Total
2008	10,86	-	8,61	79,00%
2009	9,56	-12%	8,29	87,00%
2010	10,82	13%	9,07	85,00%
2011	11,54	7%	9,47	83,00%
2012	11,83	3%	9,88	84,00%
2013	12,19	3%	10,21	84,00%
2014	12,58	3%	10,54	84,00%
2015	12,88	3%	10,77	84,00%
2016	13,18	4%	11,1	85,00%
2017	13,72	4%	11,59	85,00%
2018(*)	**14,28**	**3,50%**	**12**	**84.00%**
(*)predicted value)				

Source *: Clarksons Research Feb.2018*

Graph (13): World Total Trade And World Seaborn Trade



88,47% of the Turkey's foreign trade has been being realised by maritime transportation. The progress of the transportation between the years 2006-2017 is shown in the Table below by the modes of transportation.

61,60% of the volume of Turkey's foreign trade transportation has been carried by sea, 22,60% has been carried by road, 0,50% has been carried by rail, 13,90% has been carried by air and 1,40% has been carried by other transportation modes.

Table (21): Turkish Foreign Trade Transportation by Modes (%)

Years	Sea	Rail	Road	Air	Pipeline and Others
2006	87,4	1,1	10,4	0,1	1
2007	87,4	1,1	10	0,6	0,9
2008	86,5	1,1	10,7	0,7	1
2009	85	0,8	12,6	0,8	0,8
2010	85,6	0,8	12,5	0,3	0,8
2011	85,8	0,8	11,8	0,4	1,2
2012	87	0,6	10,7	0,4	1,4
2013	86,4	0,5	11,4	0,4	1,3
2014	86,2	0,4	11,2	0,5	1,7
2015	87,7	0,5	10,7	0,4	0,7
2016	88,06	0,46	10,76	0,32	0,4
2017	88,47	0,44	10,25	0,32	0,52

Source: Turkstat

Graph (14): Foreign Trade Transportation by Modes (%)

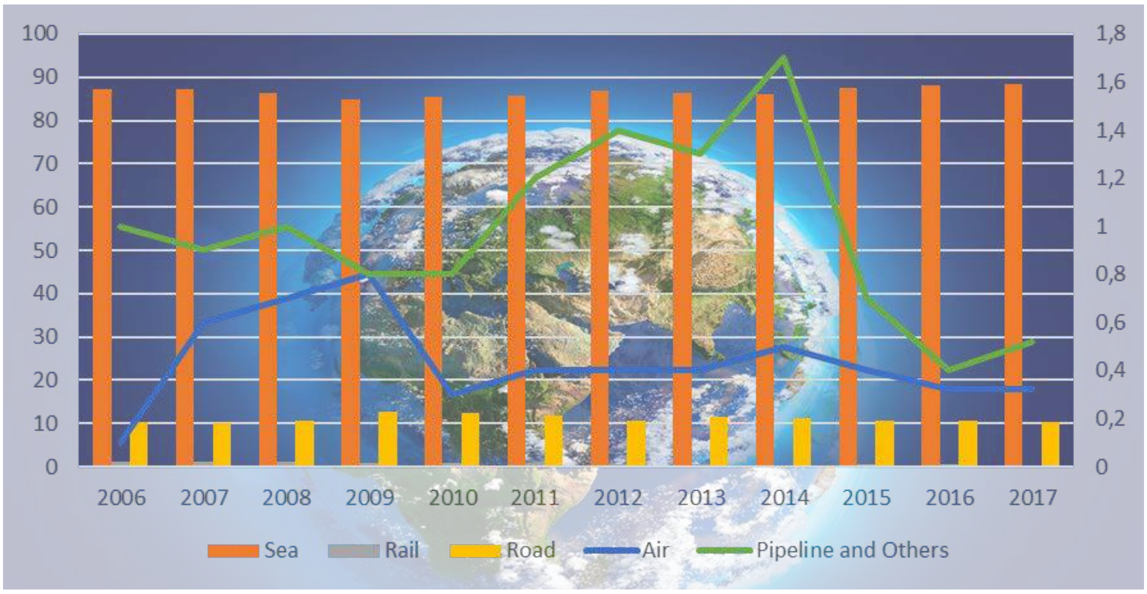


Table (22): Foreign Trade Transportation by Modes (mton) and ($) Value

By Modes		Quantity mton %	Value US $ %
EXPORT	Rail	0,58%	0,44%
	Sea	76,24%	58,16%
	Pipeline and Others	0,32%	1,40%
	Air	0,81%	10,82%
	Road	22,05%	29,18%
Total		100,00%	100,00%
IMPORT	Rail	0,37%	0,55%
	Sea	94,96%	64,13%
	Pipeline and Others	0,63%	1,49%
	Air	0,06%	16,09%
	Road	3,98%	17,74%
Total		100,00%	100,00%
EXPORT + IMPORT	Rail	0,44%	0,50%
	Sea	88,47%	61,60%
	Pipeline and Others	0,52%	1,40%
	Air	0,32%	13,90%
	Road	10,25%	22,60%
Total		100,00%	100,00%

Source: Turkstat

Developments in the Transportation of Seaborne Trade

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

The Number of Incoming Ships to the Turkish Ports

The number of incoming ships to the Turkish ports between the years 2013-2017 is shown below:

-In 2014, the number of incoming vessels decreased by 1,8% when compared to 2013.
-In 2015, the number of incoming vessels decreased by 1,4% when compared to 2014.
-In 2016, the number of incoming vessels decreased by 3,3% when compared to 2015,
-In 2017, the number of incoming vessels increased by 2,9% when compared to 2016,

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

Years	Turkish Flag Number	Foreign Flag Number	Total Number	Change %	TF %	FF %
2006	42.058	33.461	75.519	-	55,69%	44,31%
2007	43.662	35.262	78.924	4,51%	55,32%	44,68%
2008	45.362	36.042	81.404	3,14%	55,72%	44,28%
2009	45.813	34.631	80.444	-1,18%	56,95%	43,05%
2010	37.060	37.055	74.115	-7,87%	50,00%	50,00%
2011	37.234	37.900	75.134	1,37%	49,56%	50,44%
2012	38.333	37.542	75.875	0,99%	50,52%	49,48%
2013	39.835	36.295	76.130	0,34%	52,32%	47,68%
2014	38.685	36.081	74.766	-1,79%	51,74%	48,26%
2015	38.397	35.288	73.685	-1,45%	52,11%	47,89%
2016	37.644	33.576	71.220	-3,35%	52,86%	47,14%
2017	**38.263**	**35.043**	**73.306**	**2,90%**	**52,20%**	**47,80%**

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

Graph (15): Numbers of Incoming Ships to the Turkish Ports

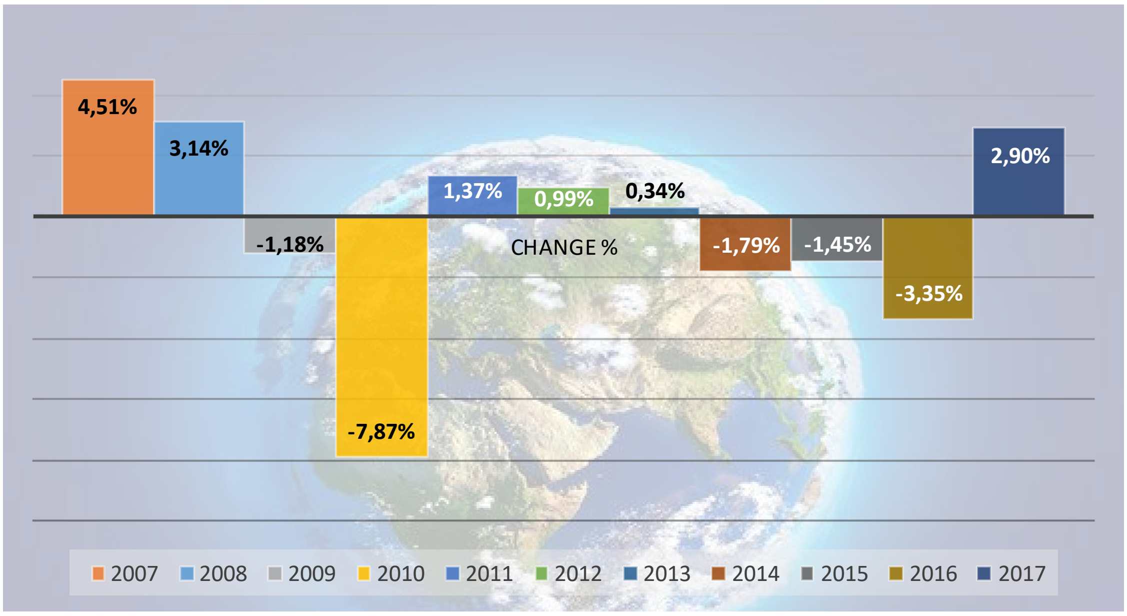


Table (24): Numbers of Incoming Ships to the Turkish Ports in 2017

Port Authority	Turkish Flag		Foreign Flag		Total	
	Ship Number	Gross Ton	Ship Number	Gross Ton	Ship Number	Gross Ton
İZMİT	4.557	21.948.113	5.991	119.659.066	10.548	141.607.179
AMBARLI	2.056	20.962.210	2.208	76.476.232	4.264	97.438.442
ALİAĞA	1.842	12.405.226	3.360	72.288.512	5.202	84.693.738
MERSİN	960	10.682.716	3.389	65.152.320	4.349	75.835.036
İSKENDERUN	1.584	6.228.769	2.986	58.304.715	4.570	64.533.484
GEMLİK	1.740	10.047.583	2.329	53.496.665	4.069	63.544.248
BOTAŞ	221	2.770.418	867	45.826.631	1.088	48.597.049
TEKİRDAĞ	1.184	5.420.583	1.352	33.283.332	2.536	38.703.915
İZMİR	807	7.579.576	1.512	27.276.029	2.319	34.855.605
TUZLA	2.311	15.849.410	1.051	13.469.589	3.362	29.319.000
İSTANBUL	1.964	7.678.215	677	9.795.640	2.641	17.473.855
SAMSUN	891	3.216.407	2.093	12.231.564	2.984	15.447.971
YALOVA	762	2.489.246	491	8.440.165	1.253	10.929.411
KARABİGA	946	1.706.249	545	7.802.594	1.491	9.508.843
KDZ.EREĞLİ	521	1.894.280	419	6.877.121	940	8.771.401
ANTALYA	404	2.332.267	346	5.984.524	750	8.316.791
ZONGULDAK	271	1.442.014	340	5.812.099	611	7.254.113
BANDIRMA	835	1.533.497	806	4.690.249	1.641	6.223.747
ÇEŞME	1.635	4.895.669	474	1.198.888	2.109	6.094.557
TAŞUCU	97	188.995	849	5.533.551	946	5.722.546
GÜLLÜK	500	1.866.442	338	3.079.630	838	4.946.072
TRABZON	322	1.006.203	467	3.174.073	789	4.180.276
KUŞADASI	479	82.249	166	3.923.998	645	4.006.247
ÇANAKKALE	1.284	1.501.227	137	1.625.909	1.421	3.127.136
BODRUM	1.872	469.106	510	1.277.478	2.382	1.746.584
MARMARİS	449	165.773	121	973.026	570	1.138.799
BARTIN	134	228.248	229	833.688	363	1.061.936
ÜNYE	389	562.849	110	478.792	499	1.041.641
MARMARA A.	766	668.234	72	372.233	838	1.040.467
HOPA	278	203.255	117	453.941	395	657.196
RİZE	199	383.441	47	239.920	246	623.361
KARASU	72	55.644	76	515.187	148	570.831
ALANYA	44	101.790	32	435.395	76	537.185
İNEBOLU	206	334.452	42	138.713	248	473.165
DİKİLİ	102	30.901	119	352.616	221	383.517

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

Port Authority	Turkish Flag		Foreign Flag		Total	
	Ship Number	Gross Ton	Ship Number	Gross Ton	Ship Number	Gross Ton
TİREBOLU	67	308.956	4	10.672	71	319.628
AYVALIK	1.019	303.232	0	0	1.019	303.232
BOZCAADA	187	70.633	10	171.649	197	242.282
FETHİYE	235	22.539	246	211.841	481	234.380
FATSA	55	34.784	61	179.356	116	214.140
GİRESUN	61	29.528	25	89.901	86	119.429
KAŞ	493	73.785	1	5.087	494	78.872
GÖCEK	96	67.179	10	10.034	106	77.213
ERDEK	152	58.982	0	0	152	58.982
AMASRA	103	54.994	0	0	103	54.994
SİNOP	122	19.860	10	32.651	132	52.511
MUDANYA	117	34.884	0	0	117	34.884
GÖKÇEADA	174	28.196	0	0	174	28.196
SÜRMENE	110	24.744	1	471	111	25.215
EDREMİT	360	21.039	0	0	360	21.039
KARATAŞ	732	20.097	0	0	732	20.097
GERZE	171	19.798	0	0	171	19.798
ENEZ	233	18.176	0	0	233	18.176
FOÇA	195	14.120	1	3.136	196	17.256
VAKFIKEBİR	57	14.565	0	0	57	14.565
ŞİLE	90	12.501	0	0	90	12.501
PAZAR	42	10.980	0	0	42	10.980
KEFKEN	159	10.693	0	0	159	10.693
SİLİVRİ	68	9.839	0	0	68	9.839
DATÇA	29	2.915	6	2.464	35	5.379
ORDU	33	5.149	0	0	33	5.149
AYANCIK	75	4.900	0	0	75	4.900
İĞNEADA	79	4.048	0	0	79	4.048
GÖRELE	12	3.670	0	0	12	3.670
CİDE	49	3.009	0	0	49	3.009
FİNİKE	30	1.911	0	0	30	1.911
KEMER	133	1.453	0	0	133	1.453
ANAMUR	17	736	0	0	17	736
MANAVGAT	24	681	0	0	24	681
TOTAL	**38.263**	**150.243.833**	**35.043**	**652.191.347**	**73.306**	**802.435.181**

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

Cabotage Transportation

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

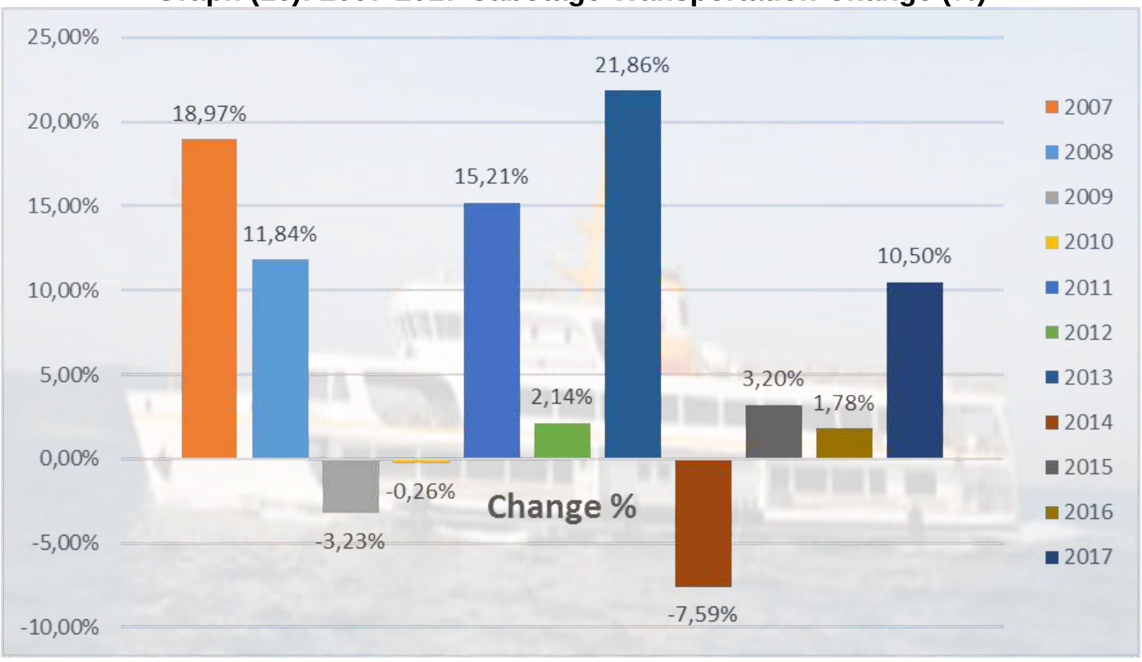
The amounts of cargoes carried bulk and partial cargoes between 2007-2017 in Turkish ports and wharves on ton basis are in the Table 25.

Table (25): 2007-2017 Cabotage Transportation

Year	Cabotage mton	Change %
2007	18.004.619	18,97%
2008	20.136.037	11,84%
2009	19.485.900	-3,23%
2010	19.434.485	-0,26%
2011	22.389.570	15,21%
2012	22.869.458	2,14%
2013	27.868.157	21,86%
2014	25.753.831	-7,59%
2015	26.578.284	3,20%
2016	27.050.225	1,78%
2017	29.898.010	10,50%

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

Graph (16): 2007-2017 Cabotage Transportation Change (%)



The total cabotage transportation in 2017 is 29.898.010 tons, the cabotage transportation increased about 66 % between the years 2007-2017.

Table (26): 2017 Cabotage Transportation by the Types of Cargoes

Cargo Types	Cabotage Loading	Cabotage Unloading	Total	%
Dry Bulk Cargo	7.276.766	8.687.479	15.964.245	24,30%
General Cargo	7.425.158	7.185.151	14.610.309	24,80%
Liquid Bulk Cargo	10.041.856	9.603.402	19.645.258	33,60%
Container	5.095.054	4.964.474	10.059.528	17,00%
Vehicle	59.176	57.563	116.739	0,20%
Total	29.898.010	30.498.069	60.396.079	100,00%

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

Graph (17): 2017 Cabotage Transportation (Loading-Unloading) by the Types of Cargoes

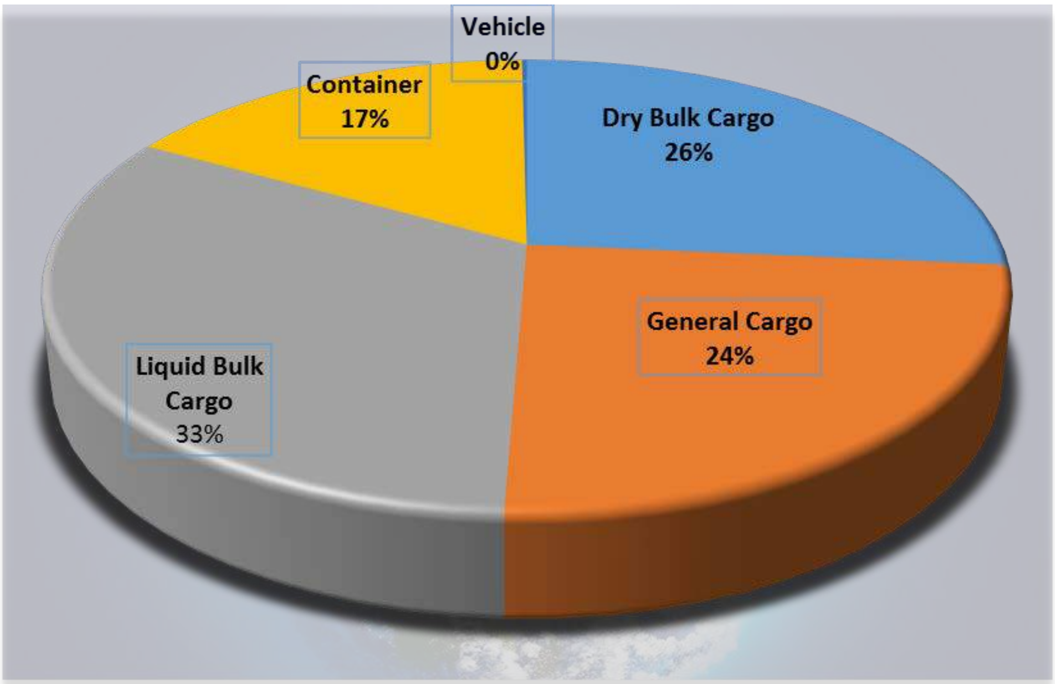


Table 26 Shows the cabotage transportation by types of cargoes. The first three cargoes are liquid bulk cargo (33%), dry bulk cargo (26%) general cargo (24%) and container (17%).

In cabotage handling in 2017, Kocaeli Port (20%), Aliağa Port (10%) and İskenderun Port (10%) took the first three place.

In cabotage loading, Kocaeli Port (18,72%), Aliağa Ports (16,88%) and Iskenderun Port (16,56%) are on the first three places, while in cabotage unloading Kocaeli Port (22,13%), Ambarlı Port (9,69%) and Tekirdag Port (9,11%) are on the top of the list.

Table (27): 2018 Cabotage Transportation in Ports

Port Authority	Cabotage Loading	Cabotage Unloading	Total	%
KOCAELİ	5.598.040	6.748.206	12.346.246	20%
ALİAĞA	5.045.305	1.267.708	6.313.013	10%
İSKENDERUN	4.951.271	1.291.644	6.242.915	10%
AMBARLI	1.493.605	2.956.628	4.450.233	7%
TEKİRDAĞ	820.519	2.777.725	3.598.244	6%
GEMLİK	1.368.800	1.466.942	2.835.742	5%
ÇANAKKALE	2.231.640	234.646	2.466.286	4%
KARADENİZ EREĞLİ	726.820	1.670.274	2.397.094	4%
İSTANBUL	56.173	2.319.644	2.375.817	4%
KARABİGA	1.235.416	1.036.936	2.272.352	4%
SAMSUN	1.049.747	975.450	2.025.197	3%
ANTALYA	521.938	1.371.914	1.893.852	3%
TUZLA	548.029	1.003.500	1.551.529	3%
BOTAŞ(CEYHAN)	282.300	1.057.990	1.340.290	2%
MERSİN	342.493	882.377	1.224.870	2%
MARMARA A.	1.057.744	3.981	1.061.725	2%
ÜNYE	522.138	324.705	846.843	1%
İZMİR	214.297	532.731	747.028	1%
BANDIRMA	451.132	247.284	698.416	1%
TRABZON	127.057	469.909	596.966	1%
RİZE	0	563.495	563.495	1%
İNEBOLU	455.010	1.500	456.510	1%
YALOVA	0	431.040	431.040	1%
TİREBOLU	0	364.950	364.950	1%
ZONGULDAK	129.446	107.780	237.226	0%
BARTIN	176.984	34.502	211.486	0%
HOPA	130.533	71.828	202.361	0%
GÜLLÜK	172.034	3.600	175.634	0%
TAŞUCU	132.750	1.471	134.221	0%
GÖCEK	0	83.270	83.270	0%
ALANYA	0	71.827	71.827	0%
AMASRA	42.110	0	42.110	0%
ÇEŞME	15	32.437	32.452	0%
MARMARİS	0	21.486	21.486	0%
FATSA	0	18.700	18.700	0%
ERDEK	120	18.090	18.210	0%
GİRESUN	3.200	13.604	16.804	0%
KARASU	0	10.837	10.837	0%
DİKİLİ	5.944	97	6.041	0%
MUDANYA	3.150	1.840	4.990	0%
BOZCAADA	0	3.945	3.945	0%
ŞİLE	2.250	0	2.250	0%
VAKFIKEBİR	0	1.500	1.500	0%
FOÇA	0	70	70	0%
FİNİKE	0	6	6	0%
TOTAL	29.898.010	30.498.069	60.396.079	100%

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

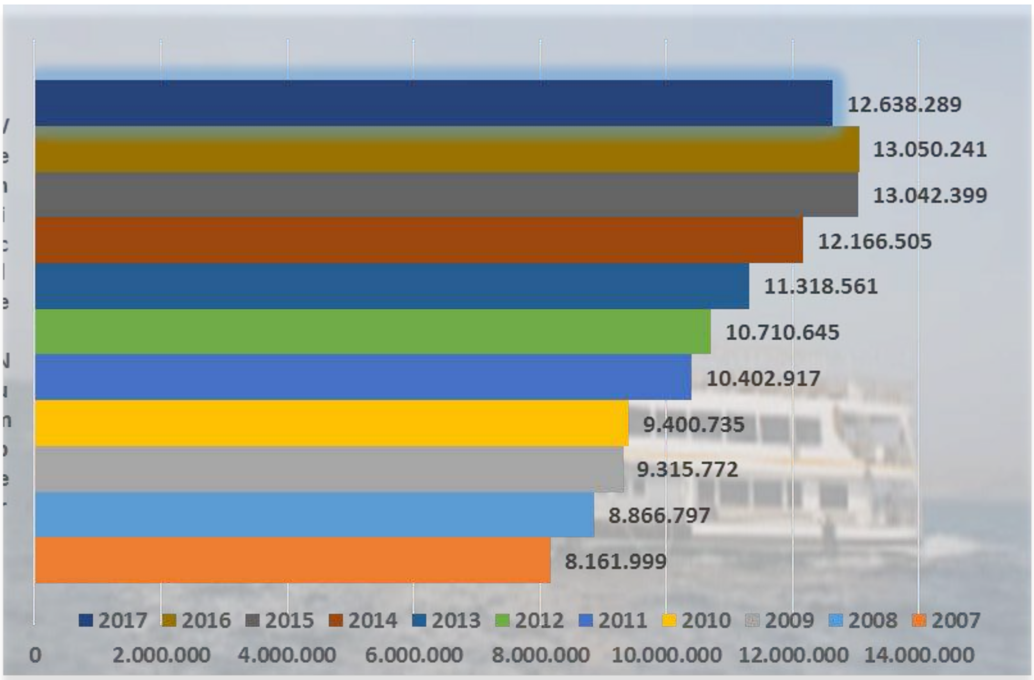
Table (28): 2007-2017 Cabotage Transportation Vehicle Number

Years	Vehicle Number	Annual Change %	Vehicle NumberxMile	Annual Change %
2007	8.161.999	5,00%	59.942.527	13,29%
2008	8.866.797	8,64%	82.950.808	27,74%
2009	9.315.772	5,06%	82.580.396	-0,45%
2010	9.400.735	0,91%	83.607.444	1,23%
2011	10.402.917	10,66%	83.283.519	-0,39%
2012	10.710.645	2,96%	77.785.568	-7,07%
2013	11.318.561	5,68%	85.096.902	8,59%
2014	12.166.505	7,49%	89.322.962	4,73%
2015	13.042.399	7,20%	95.505.115	6,47%
2016	13.050.241	0,06%	92.267.227	-3,39%
2017	12.638.289	-3,15%	95.185.009	3,16%

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

In Table 28, the changes in transportation of the vehicles in cabotage between the years 2007 and 2017 are shown. The number of vehicles increased 63% in total, between 2007 and 2017.

Graph (18): 2007-2017 Cabotage Transportation Vehicle Number



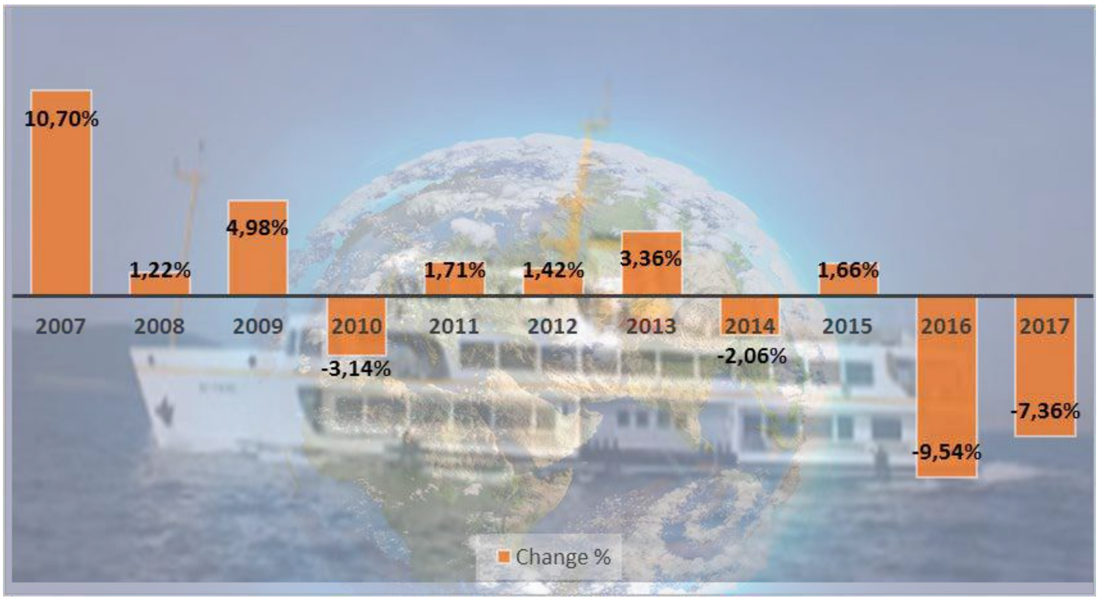
The Table 29, about the numbers of passengers carried in cabotage transportation shows that the biggest increase was in 2007 with 10,7% and then, in 2013 the increase became 3,4%. In the years 2007-2016 decrease of 8,4% in passenger number was realized.

Table (29): 2007-2017 Cabotage Transportation Passenger Number

Year	Passenger Number	Change %	Vehicle Number x Mile	Change %
2007	149.824.929	10,70%	842.975.355	10,69%
2008	151.645.639	1,22%	847.917.253	0,58%
2009	159.194.370	4,98%	886.609.389	4,36%
2010	154.198.088	-3,14%	847.715.977	-4,59%
2011	156.842.003	1,71%	854.909.150	0,84%
2012	159.076.921	1,42%	787.572.051	-8,55%
2013	164.426.997	3,36%	900.226.869	12,51%
2014	161.048.004	-2,06%	974.923.011	7,66%
2015	163.723.544	1,66%	992.592.392	1,78%
2016	148.101.589	-9,54%	1.112.255.126	10,76%
2017	137.195.691	-7,36%	1.138.826.307	2,38%

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

Graph (19): 2007-2017 Cabotage Transportation Passenger Number



Developments in the International Sea Transportation

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

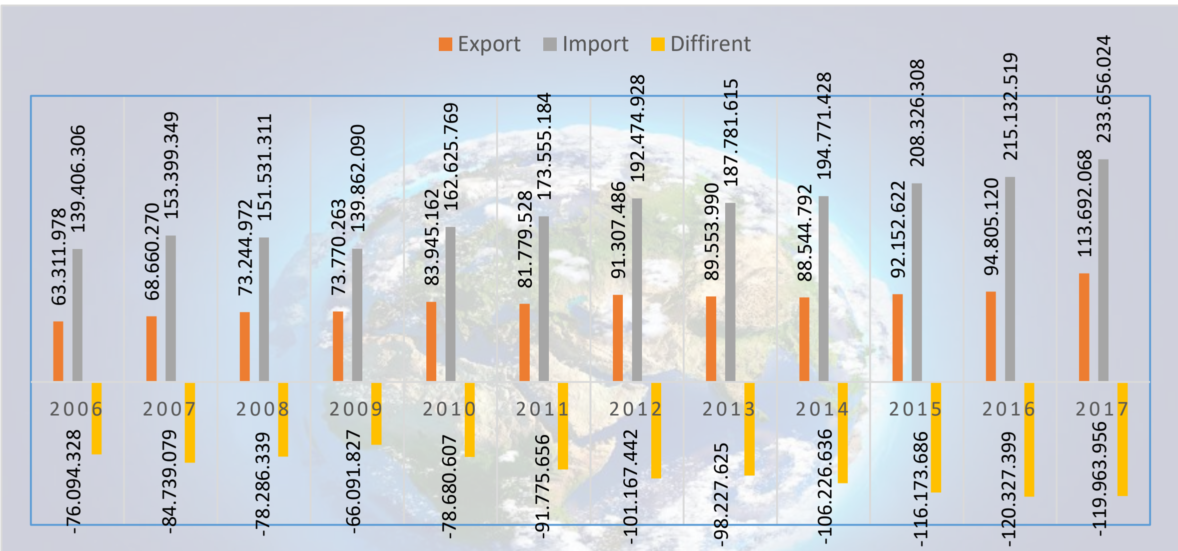
Table (30): Development of the Seaborne Trade (2007-2017) Tons

Years	Seaborne Trade Total	Export	Import	Turkish Flag	Turkish Flag %	Foreign Flag %
2006	202.718.284	63.311.978	139.406.306	42.615.725	21	79
2007	222.059.619	68.660.270	153.399.349	36.992.141	17	83
2008	224.776.283	73.244.972	151.531.311	31.791.383	14	86
2009	213.632.353	73.770.263	139.862.090	29.965.566	14	86
2010	246.570.931	83.945.162	162.625.769	40.494.118	16	84
2011	255.334.712	81.779.528	173.555.184	42.396.010	17	83
2012	283.782.414	91.307.486	192.474.928	38.712.247	14	86
2013	277.335.605	89.553.990	187.781.615	34.610.534	12	88
2014	283.316.220	88.544.792	194.771.428	33.624.322	12	88
2015	300.478.930	92.152.622	208.326.308	36.479.586	12	88
2016	309.937.639	94.805.120	215.132.519	38.623.279	12	88
2017	347.348.092	113.692.068	233.656.024	36.815.820	11	89

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

In 2017 export shipments increased to 113,6 million tons and import shipments increased to 233,6 million tons when compared to the previous year. The share of Turkish flag vessels transporting foreign trade cargoes have been realized as 11% on the average.
As a whole, the share of the Turkish flag vessels transporting foreign trade cargoes between 2006-2017 have been realized as 14% on the average.

Graph (20): Development of the Seaborne Trade (Tons)



The transportation of foreign trade cargoes; 9% of the import transportation 233 million tons in total have been carried by Turkish flag vessels. 13% of the export transportation 113 million tons in total have been carried by Turkish flag vessels.

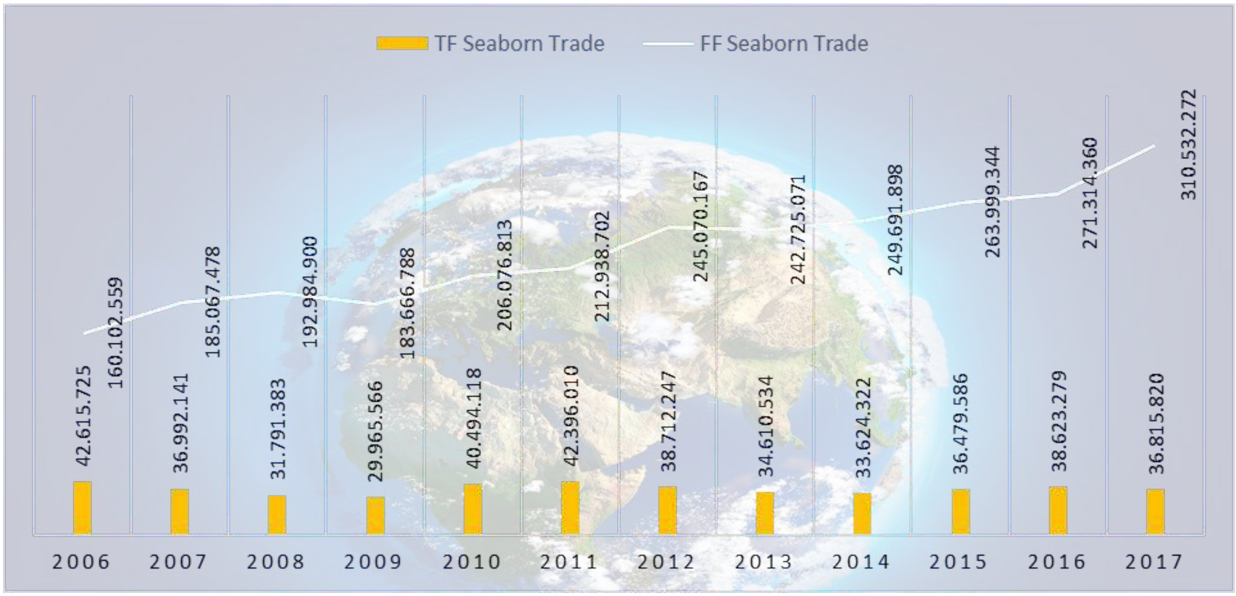
Table (31): Foreign Trade Transportation by Flags (Tons)

Year	Turkish Flag Import	%	Turkish Flag Export	%	Foreign Flag Import	%	Foreign Flag Export	%	TF Seaborn Trade	FF Seaborn Trade
2006	32.794.143	24	9.821.582	16	106.612.163	76	53.490.396	84	42.615.725	160.102.559
2007	27.187.904	18	9.804.237	14	126.211.445	82	58.856.033	86	36.992.141	185.067.478
2008	21.136.641	14	10.654.742	15	130.394.670	86	62.590.230	85	31.791.383	192.984.900
2009	20.387.046	15	9.578.520	13	119.475.045	85	64.191.743	87	29.965.566	183.666.788
2010	28.878.432	18	11.615.686	14	133.747.337	82	72.329.476	86	40.494.118	206.076.813
2011	30.122.065	17	12.273.945	15	143.433.119	83	69.505.583	85	42.396.010	212.938.702
2012	26.476.350	14	12.235.897	13	165.998.578	86	79.071.589	87	38.712.247	245.070.167
2013	22.949.887	12	11.660.647	13	164.831.728	88	77.893.343	87	34.610.534	242.725.071
2014	20.880.367	11	12.743.955	14	173.891.061	89	75.800.837	86	33.624.322	249.691.898
2015	22.724.776	11	13.754.810	15	185.601.532	89	78.397.812	85	36.479.586	263.999.344
2016	23.350.424	11	15.272.855	16	191.782.095	89	79.532.265	84	38.623.279	271.314.360
2017	21.677.485	9%	15.138.335	13%	211.978.539	91%	98.553.733	87%	36.815.820	310.532.272
2016-2017 Change									-5%	14%

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

The transportation of seaborne foreign trade cargoes increased to 347 million tons when compared with 2017 (202 million tons). Import goods increased to 233 million tons, (139,4 million tons) export goods increased to 113 million tons (63,3 million tons) when compared with 2006 with the same period.

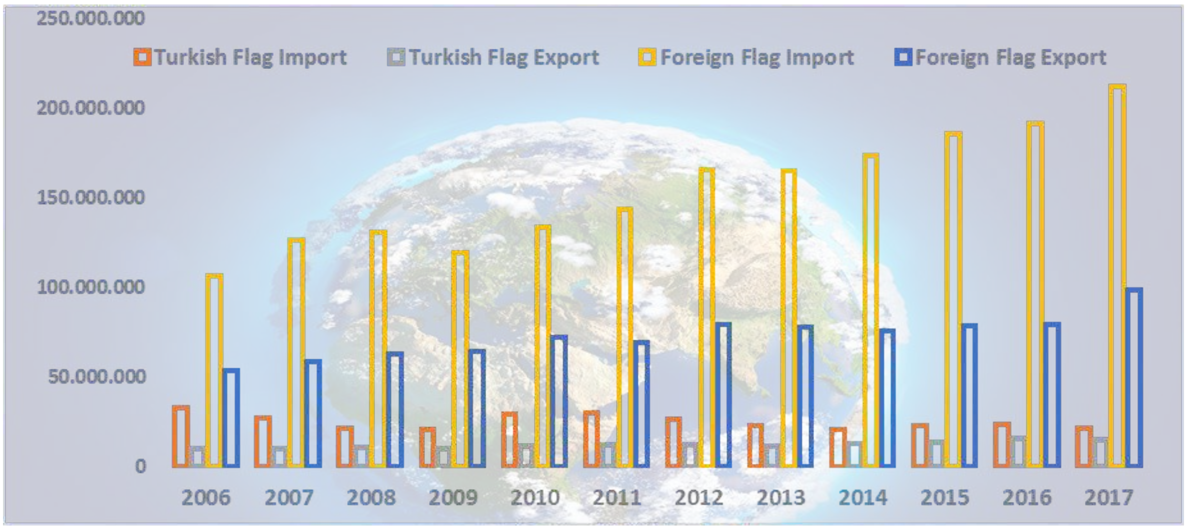
Graph (21): Turkish/Foreign Flag Shares (Tons)



The share of Turkish flag vessels, in total foreign trade transportation and in export basis increased to 15 million tons and in import basis decreased to 21 million tons in 2017, when compared with 9,8 and 32,8 million tons in 2006.

The share of the foreign flag vessels, in total foreign trade transportation and in export basis increased to 98 million tons and in import basis increased to 211 million tons in 2017, when compared with 53.5 and 106,6 million tons in 2006.

Graph (22): Turkish/Foreign Flag Shares



Development in Foreign Trade Transportation by Types of Cargoes

The major segments of the exports and transit loading goods in 2017, is totally as 169 million tons are %40 Liquid Bulk cargo, 31% Container, 13% general cargo, 13% dry bulk cargo and %3 vehicle.

Table (32): By Types Cargo Handling Export and Transit Loading

Cargo Types	Turkish Flag	Foreign Flag	Export	Transit Loading	Total	%
Dry Bulk Cargo	3.189.006	17.961.621	21.150.627	40.915	21.191.542	13%
General Cargo	1.811.480	20.119.884	21.931.364	10.695	21.942.059	13%
Liquid Cargo	325.049	20.930.008	21.255.057	46.923.124	68.178.181	40%
Container	5.919.224	38.514.092	44.433.316	8.569.502	53.002.818	31%
Vehicle	3.893.576	1.028.128	4.921.704	160	4.921.864	3%
Total	**15.138.335**	**98.553.733**	**113.692.068**	**55.544.396**	**169.236.464**	**100%**

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

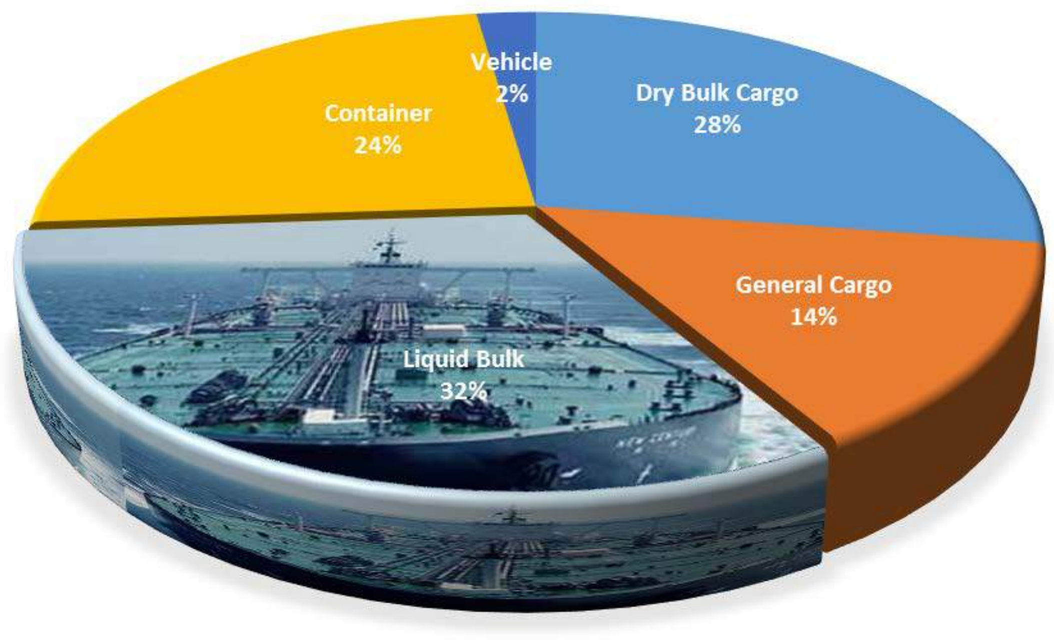
Major segments of the imported and transit unloading goods in 2017, is totally as 241 million tons are 38% dry bulk cargo, 27% Liquid bulk cargo, 19% Container, %15 General Cargo and %2 vehicle.

Table (33): By Types Cargo Handling Import and Transit Unloading

Cargo Types	Turkish Flag	Foreign Flag	Import	Transit Unloading	Total	%
Dry Bulk Cargo	4.825.797	86.845.411	91.671.208	15.720	91.686.928	38%
General Cargo	2.671.864	32.850.092	35.521.956	72.862	35.594.818	15%
Liquid Cargo	6.477.745	58.379.115	64.856.860	217.048	65.073.908	27%
Container	3.971.504	33.304.359	37.275.863	7.579.699	44.855.562	19%
Vehicle	3.730.575	599.562	4.330.137	0	4.330.137	2%
Total	21.677.485	211.978.539	233.656.024	7.885.329	241.541.353	100%

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

Graph (23): Import and Export by the Types of Cargoes



The Progress in Seaborne Trade by Country Groups

In the year 2017, 60 million tons of export and 74 million tons of import, totally (loading-unloading) 134 million tons of transportation have been realized to the OECD countries.
Table (34) shows the export and import values to the OECD countries.

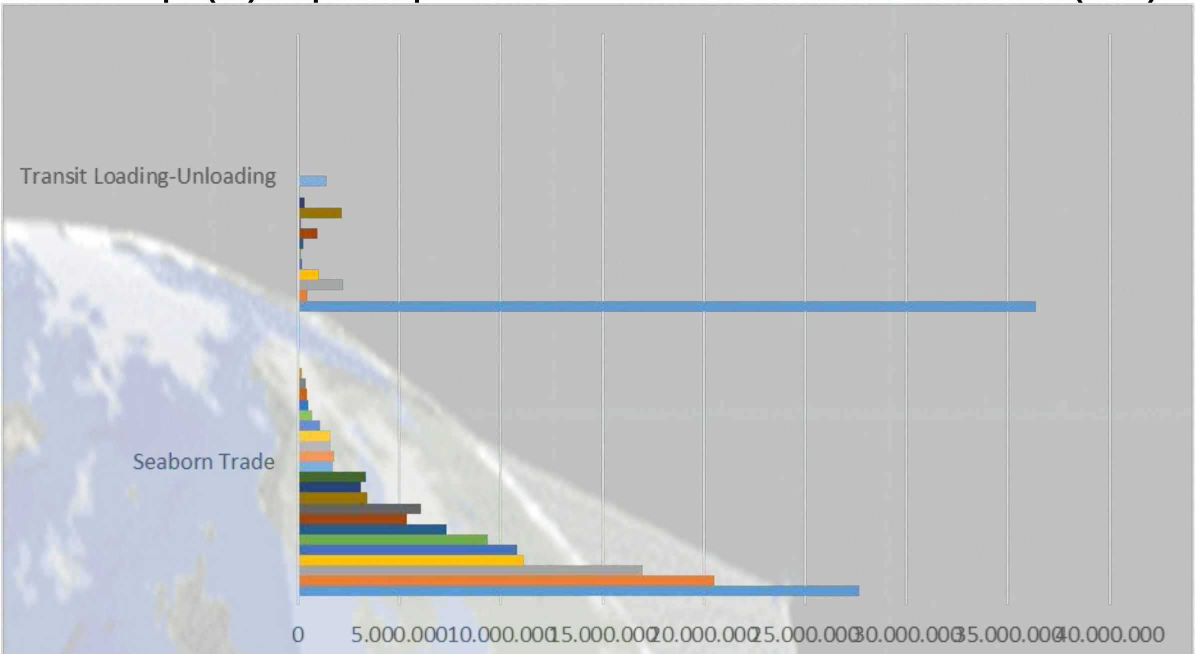
Table (34): Seaborne Trade to OECD Countries (tons) (2017)

OECD Country	Turkish Flag	OECD Country Flag	Foreign Flag	Export	Transit Loading	Total
Italy	5.900.692	361.775	13.102.743	19.365.210	36.054.772	55.419.982
Spain	1.019.192	0	7.303.462	8.322.654	803.087	9.125.741
Greece	1.069.260	85.689	4.636.852	5.791.801	894.169	6.685.970
U.S.	179.135	0	6.021.734	6.200.869	446.605	6.647.474
Isreal	1.452.250	83.335	4.187.563	5.723.148	157.985	5.881.133
France	904.915	0	1.649.678	2.554.593	937.133	3.491.726
U.K.	44.368	56.233	3.006.188	3.106.789	196.089	3.302.878
Belgium	0	2.800	3.094.086	3.096.886	63.488	3.160.374
Canada	0	0	815.475	815.475	2.175.089	2.990.564
Portugal	77.520	6.708	1.334.776	1.419.004	1.301.374	2.720.378
Holland	36.450	364.292	1.201.912	1.602.654	91.617	1.694.271
S.Korea	6.500	0	659.136	665.636	129.738	795.374
Germany	0	45.118	526.969	572.087	37.600	609.687
Sweden	0	0	458.410	458.410	0	458.410
Slovenia	19.619	0	291.796	311.415	264	311.679
Poland	7.000	0	283.734	290.734	0	290.734
Japan	0	744	101.324	102.068	3.226	105.294
Chile	0	0	76.503	76.503	0	76.503
Iceland	0	0	44.625	44.625	0	44.625
Ireland	0	0	43.856	43.856	0	43.856
Finland	0	0	38.248	38.248	0	38.248
Denmark	0	0	28866	28866	0	28866
Mexico	0	0	9.123	9.123	0	9.123
Norway	0	0	4.305	4.305	0	4.305
Australia	0	0	2.441	2.441	0	2.441
Estonia	0	0	0	0	15	15
Total	**10.716.901**	**1.006.694**	**48.923.805**	**60.647.400**	**43.292.251**	**103.939.651**

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

The first 3 major countries as Turkey's export & transit loading foreign trade partners among OECD countries are Italy with 53,32%, Spain 8,78%, Greece 6,43% shares.

Graph (24): Export-Import-Transit Seaborn Trade to OECD Countries (2017)



	Seaborn Trade	Transit Loading-Unloading
Iceland	44.625	0
Ireland	55.206	301
Chile	77.757	1.253
Mexico	79.660	0
Japan	220.470	40.387
Slovenia	419.069	9.168
Poland	480.054	7.215
Estonia	523.303	2.508
Denmark	714.576	15
Sweden	1.078.994	0
Australia	1.575.589	0
Denmark	1.584.353	0
Germany	1.757.758	50.435
Portugal	1.704.683	1.431.731
Norway	3.379.746	110
S.Korea	3.087.109	329.575
Canada	3.400.599	2.175.089
Holland	6.040.505	125.409
France	5.377.319	980.707
U.K.	7.360.524	237.313
Belgium	9.351.527	166.166
Isreal	10.812.073	223.990
Spain	11.133.139	1.023.313
Greece	16.971.903	2.203.378
U.S.	20.543.936	461.270
Italy	27.661.850	36.331.403

Among OECD countries, the first three that Turkey imports from / that conducts transit unloading in Turkey are USA (18,57%), Greece (16,16%) and Italy (11,09%). In the year of 2017, the seaborne trade volume between Turkey and the OECD countries was 181 million metric tons. 135 million metric tons of this amount was import –export while 46 million metric tons was transit cargoes.

The seaborne trade share of the Turkish flag vessels was 10% and foreign flag vessels' was 90%.

Table (35): Seaborne Trade to OECD Countries (tons) (2017)

OECD Country	Turkish Flag	OECD Country Flag	Foreign Flag	Import	Transit Unloading	Total
U.S.	902.820	512	13.439.735	14.343.067	14.665	14.357.732
Greece	1.147.359	555.396	9.477.347	11.180.102	1.309.209	12.489.311
Italy	3.539.135	617.838	4.139.667	8.296.640	276.631	8.573.271
Belgium	254.138	4.155	5.996.348	6.254.641	102.678	6.357.319
Isreal	414.676	5.518	4.668.731	5.088.925	66.005	5.154.930
Holland	54.720	131.472	4.251.659	4.437.851	33.792	4.471.643
U.K.	66.497	29.480	4.157.758	4.253.735	41.224	4.294.959
Norway	0	164.875	3.210.566	3.375.441	110	3.375.551
Spain	254.930	6.765	2.548.790	2.810.485	220.226	3.030.711
France	1.036.958	0	1.785.768	2.822.726	43.574	2.866.300
S.Korea	0	0	2.421.473	2.421.473	199.837	2.621.310
Canada	0	0	2.585.124	2.585.124	0	2.585.124
Australia	0	0	1.573.148	1.573.148	0	1.573.148
Denmark	0	0	1.555.487	1.555.487	0	1.555.487
Germany	11.606	44.049	1.130.016	1.185.671	12.835	1.198.506
Denmark	0	0	714.576	714.576	0	714.576
Sweden	0	0	620.584	620.584	0	620.584
Estonia	0	0	485.055	485.055	2.508	487.563
Portugal	13.406	0	272.273	285.679	130.357	416.036
Poland	17.889	0	171.431	189.320	7.215	196.535
Japan	0	0	118.402	118.402	37.161	155.563
Slovenia	32.443	0	75.211	107.654	8.904	116.558
Mexico	0	0	70.537	70.537	0	70.537
Ireland	0	0	11.350	11.350	301	11.651
Chile	0	0	1.254	1.254	1.253	2.507
Iceland	0	0	0	0	0	0
Toplam	7.746.577	1.560.060	65.482.290	74.788.927	2.508.485	77.297.412

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

In the year 2017, 54 million tons of export and 59 million tons of import, totally 113 million tons of seaborne transportation have been realized to the EU countries.

The first 3 major countries as Turkey's export & transit loading foreign trade partners among EU countries are Italy; with 57%, Spain with 9%, Greece with 7% shares.

Table (36): Seaborne Trade (Export) to EU Countries (tons) (2017)

EU Countries	Turkish Flag	EU Country Flag	Foreign Flag	Export	Transir Loading	Total
Italy	5.900.692	361.775	13.102.743	19.365.210	36.054.772	55.419.982
Spain	1.019.192	0	7.303.462	8.322.654	803.087	9.125.741
Greece	1.069.260	85.689	4.636.852	5.791.801	894.169	6.685.970
France	904.915	0	1.649.678	2.554.593	937.133	3.491.726
Malta	2.100	1.159.187	1.959.599	3.120.886	262.216	3.383.102
Romania	304.296	0	2.227.053	2.531.349	834.916	3.366.265
U.K.	44.368	56.233	3.006.188	3.106.789	196.089	3.302.878
Belgium	0	2.800	3.094.086	3.096.886	63.488	3.160.374
Portugal	77.520	6.708	1.334.776	1.419.004	1.301.374	2.720.378
Bulgaria	378.915	0	772.388	1.151.303	581.469	1.732.772
Holland	36.450	364.292	1.201.912	1.602.654	91.617	1.694.271
Germany	0	45.118	526.969	572.087	37.600	609.687
Crotia	5.350	0	180.475	185.825	354.000	539.825
Sweden	0	0	458.410	458.410	0	458.410
Slovenia	19.619	0	291.796	311.415	264	311.679
Polland	7.000	0	283.734	290.734	0	290.734
Ireland	0	0	43.856	43.856	0	43.856
Letonya	0	0	41.156	41.156	0	41.156
Finland	0	0	38.248	38.248	0	38.248
Denmark	0	0	28.866	28.866	0	28.866
Latvia	0	0	10.122	10.122	0	10.122
Estonia	0	0	0	0	15	15
Total	9.769.677	2.081.802	42.192.369	54.043.848	42.412.209	96.456.057

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

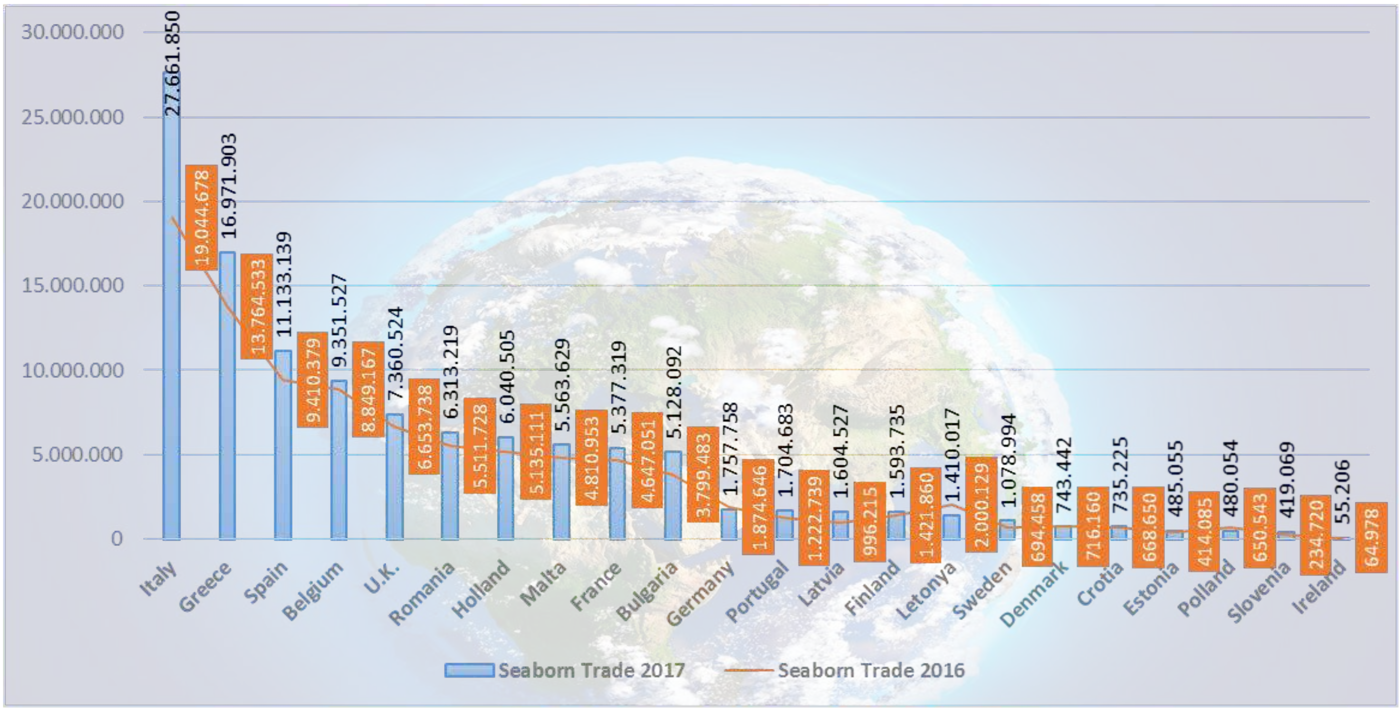
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among EU countries are; Greece with 20%, Italy 14% and Belgium 10% shares.

Table (37): Seaborne Trade (Import) to EU Countries (tons) (2017)

EU Countries	Turkish Flag	EU Countries Flag	Foreign Flag	Import	Transit Unloading	Toplam
Greece	1.147.359	555.396	9.477.347	11.180.102	1.309.209	12.489.311
Italy	3.539.135	617.838	4.139.667	8.296.640	276.631	8.573.271
Belgium	254.138	4.155	5.996.348	6.254.641	102.678	6.357.319
Romania	804.230	0	2.977.640	3.781.870	734.199	4.516.069
Holland	54.720	131.472	4.251.659	4.437.851	33.792	4.471.643
Bulgaria	1.099.437	0	2.877.352	3.976.789	474.921	4.451.710
U.K.	66.497	29.480	4.157.758	4.253.735	41.224	4.294.959
Spain	254.930	6.765	2.548.790	2.810.485	220.226	3.030.711
France	1.036.958	0	1.785.768	2.822.726	43.574	2.866.300
Malta	2.905	478.917	1.960.921	2.442.743	36.083	2.478.826
Latvia	4.998	0	1.589.407	1.594.405	2	1.594.407
Finland	0	0	1.555.487	1.555.487	0	1.555.487
Letonya	4.997	0	1.363.864	1.368.861	30	1.368.891
Germany	11.606	44.049	1.130.016	1.185.671	12.835	1.198.506
Denmark	0	0	714.576	714.576	0	714.576
Sweden	0	0	620.584	620.584	0	620.584
Crotia	112.407	0	436.993	549.400	0	549.400
Estonia	0	0	485.055	485.055	2.508	487.563
Portugal	13.406	0	272.273	285.679	130.357	416.036
Poland	17.889	0	171.431	189.320	7.215	196.535
Slovenia	32.443	0	75.211	107.654	8.904	116.558
Ireland	0	0	11.350	11.350	301	11.651
Total	8.458.055	1.868.072	48.599.497	58.925.624	3.434.689	62.360.313

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

Graph (25): Seaborne Trade to EU Countries (Tons) (2017)



In the year 2017, 15 million tons of export and 76 million tons of import, totally 91 million tons seaborne transportation have been realized to the BSEC countries.

The first 3 major countries as Turkey's export & transit loading foreign trade partners among BSEC countries are Greece; with 35%, Romania with 17%, Russian with 17% shares.

Table (38): Seaborne Trade to BSEC Countries (Tons) 2017

BSEC Countries	Turkish Flag	BSEC Country Flag	Foreign Flag	Export	Transit Loading	Total
Greece	1.069.260	85.689	4.636.852	5.791.801	894.169	6.685.970
Romania	304.296	0	2.227.053	2.531.349	834.916	3.366.265
Russian	337.360	330.320	1.883.533	2.551.213	727.656	3.278.869
Ukraine	306.123	59.023	1.512.651	1.877.797	329.889	2.207.686
Georgia	614.832	0	265.708	880.540	893.379	1.773.919
Bulgaria	378.915	0	772.388	1.151.303	581.469	1.732.772
Albania	10.822	0	258.295	269.117	0	269.117
Azerbaijan	0	0	10.881	10.881	0	10.881
Moldova	5.050	0	3.000	8.050	0	8.050
Total	**3.026.658**	**475.032**	**11.570.361**	**15.072.051**	**4.261.478**	**19.333.529**

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

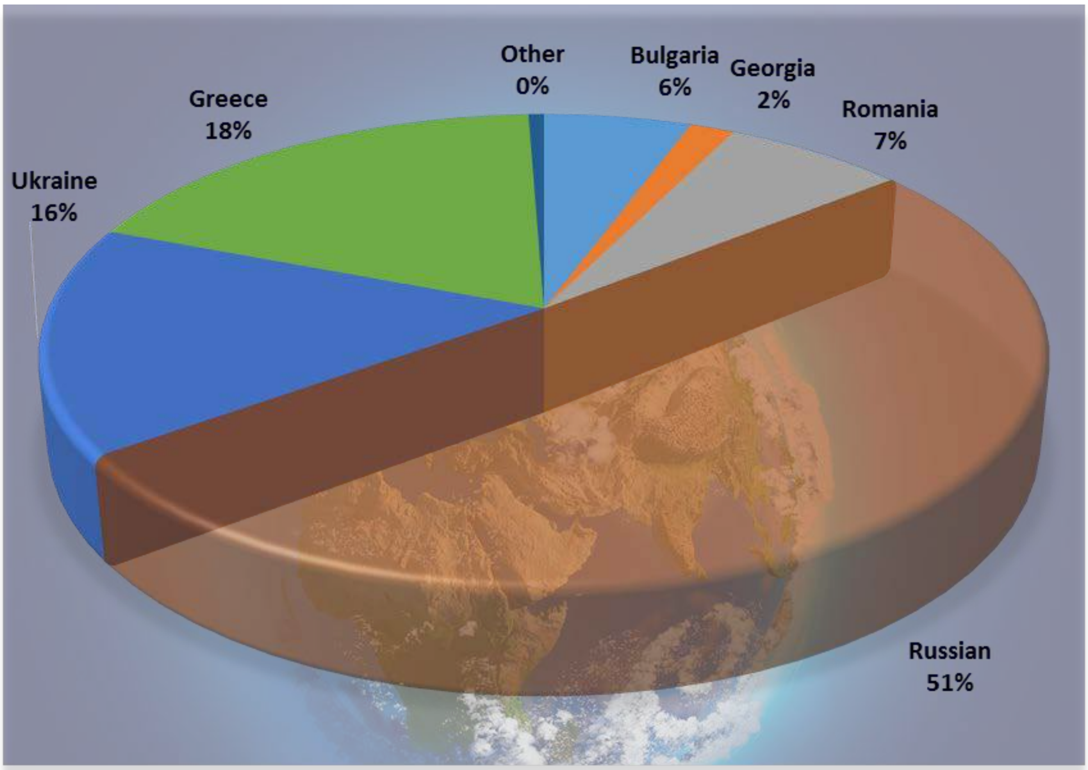
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among BSEC countries are; Russia with 56%, Ukraine with 16% and Greece with 16% shares.

Table (39): Seaborne Trade to BSEC Countries (Tons)

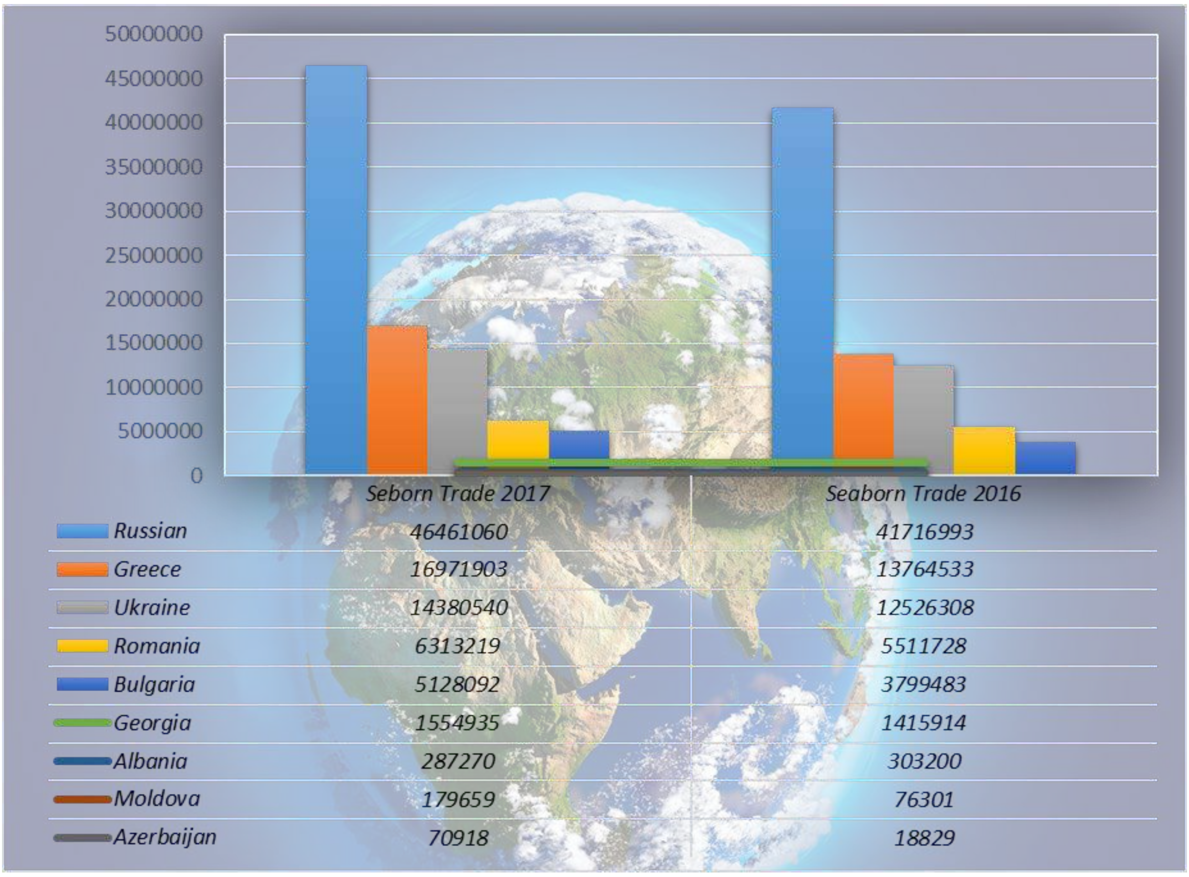
BSEC Countries	Turkish Flag	BSEC Country Flag	Foreign Flag	Import	Transit Unloading	Total
Albania	0	0	18.153	18.153	0	18.153
Azerbaijan	0	0	60.037	60.037	0	60.037
Bulgaria	1.099.437	0	2.877.352	3.976.789	474.921	4.451.710
Georgia	349.143	0	325.252	674.395	263.354	937.749
Moldova	23.567	2.679	145.363	171.609	0	171.609
Romania	804.230	0	2.977.640	3.781.870	734.199	4.516.069
Russian	2.728.352	4.590.083	36.591.412	43.909.847	987.480	44.897.327
Ukraine	2.458.834	517.243	9.526.666	12.502.743	529.929	13.032.672
Greece	1.147.359	555.396	9.477.347	11.180.102	1.309.209	12.489.311
Total	**8.610.922**	**5.665.401**	**61.999.222**	**76.275.545**	**4.299.092**	**80.574.637**

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

Graph (26): Seaborne Trade to BSEC Countries Foreign Trade



Graph (27): Seaborne Trade (Export-Import) to BSEC Countries Foreign Trade



World Container Fleet by Country of Domicile

The “country of domicile” examination (including container ships of 1.000 GT and over) shows that at the beginning of 2017, 19.979.000 TEU of the container capacity was not registered in the country of domicile of the owner, but it was flagged out.

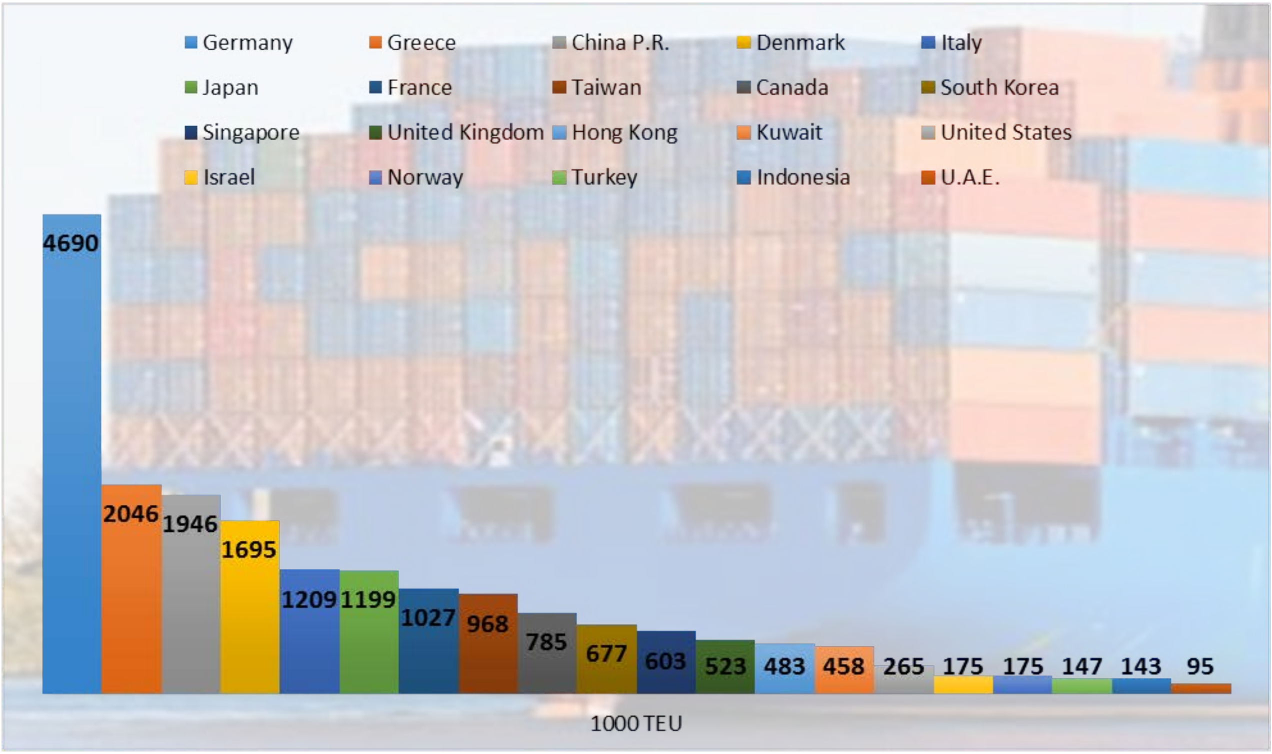
Table (40): World Full Container Fleet by Country of Domicile (1000 GT and over) 2017

TEU-rank ' 17 ('16)	Country of control	National flag				Foreign flags				Total fleet controlled			
		No	1000 dwt	1000 TEU	Av. Age	No	1000 dwt	1000 TEU	Av. Age	No	1000 dwt	1000 TEU	Av.age
1 (1)	Germany	117	9150	752	10.6	1234	49485	3938	9.8	1351	58635	4690	9.8
2 (2)	Greece	7	562	49	16.0	453	24521	1997	11.1	460	25083	2046	11.2
3 (4)	China P.R.	192	6681	501	13.4	254	16496	1445	8.0	446	23177	1946	10.4
4 (3)	Denmark	114	11307	972	12.4	158	9529	722	10.6	272	20836	1695	11.3
5 (5)	Italy	-	-			204	15232	1209	15.0	204	15232	1209	15.0
6 (6)	Japan	9	592	55	3.5	249	13577	1144	8.8	258	14169	1199	8.6
7 (7)	France	24	2341	196	9.3	117	9893	831	9.2	141	12234	1027	9.2
8 (8)	Taiwan	34	1687	133	10.6	212	10361	835	12.8	246	12048	968	12.5
9 (11)	Canada	1	15	1	11.6	100	8978	784	6.3	101	8993	785	6.3
10 (9)	S.Korea	87	1296	94	16.3	124	7065	583	7.9	211	8361	677	11.4
11 (10)	Singapore	127	4590	354	9.9	86	3168	249	14.8	213	7757	603	11.9
12 (12)	U.K.	14	957	83	8.4	100	5567	439	11.3	114	6524	523	11.0
13 (13)	Hong Kong	67	4962	430	8.2	27	675	52	17.3	94	5637	483	10.8
14 (15)	Kuwait	1	145	13	4.7	41	4886	444	7.6	42	5032	458	7.5
15 (14)	U.S.	28	883	65	26.9	65	2634	200	12.7	93	3517	265	17.0
16 (16)	Israel	5	288	23	10.4	27	1893	152	7.4	32	2182	175	7.9
17 (19)	Norway	-	-	-		48	2200	175	10.0	48	2200	175	10.0
18 (17)	Turkey	48	994	73	13.8	40	952	74	14.1	88	1946	147	13.9
19 (18)	Indonesia	181	1903	126	17.9	14	237	17	14.3	195	2139	143	17.6
20 (20)	U.A.E.	-				56	1277	95	17.0	56	1277	95	17.0
21 (22)	Netherlands	31	385	31	12.0	60	804	63	9.0	91	1189	94	10.0
22 (23)	Iran	27	1124	86	12.6	1	86	7	7.0	28	1210	93	12.4
23 (25)	Belgium	-				25	1089	84	7.6	25	1089	84	7.6
24 (21)	Cyprus	2	28	2	21.7	13	674	53	10.2	15	702	55	11.8
25 (24)	Thailand	22	270	20	13.4	25	422	32	16.4	47	692	52	15.0
26 (26)	Vietnam	33	340	24	13.5	8	72	5	18.2	41	412	30	14.4
27 (27)	Russia	13	87	7	19.6	11	229	17	14.2	24	316	24	17.1
28 (28)	India	7	205	15	12.8	6	108	9	20,9	13	313	23	16.5
29 (29)	Philippines	28	167	13	21.7	8	129	10	12.3	36	296	23	19.6
30 (30)	Malaysia	22	255	18	20.7	2	8	0	39.8	24	263	19	22.3
Total 30 countries		1241	51216	4140	13.6	3768	192245	15667	10.5	5009	243461	19806	11.3
Others		50	564	42	18.5	55	570	45	20.7	105	1134	86	19.7
Subtotal		1291	51780	4181	13.8	3823	192815	15711	10.7	5114	244595	19893	11.5
Unknown WORLD TOTAL										19	937	86	
World Total										5133	245.532	19.979	

Source : ISL January-February 2017

As regards the owner countries, German ship owners controlled by far the largest part of the world container fleet, namely 4,6 million TEU (1.351 container vessels) followed by Greece with 2 million TEU (460 container vessels) and China with 1,9 milion TEU (446 container vessels).

Graph (28): World Full Container Fleet by Country of Domicile (*1000 GT and over*) 2017



When the container transportations in 2017 is examined with regard to cabotage, exports, imports and transit cargoes; on the basis of TEU, exports became 3,8 million TEU, imports 3.9 million TEU, cabotage loading-unloading 935.521 TEU and transit 1.232.937 TEU.

Transportation volume of Turkey's container transports by sea way was 3.9 million TEU in 2006; in 2017 it became 9 million TEU, at the same period imports cargoes increased to 4 million TEU from 1.8 million TEU and the exports cargoes increased to 3.9 million TEU when compared with 1.8 million TEU in 2006.

Table (41): Container Handling 2006-2017 (TEU)

Year	Loading (TEU)			Unloading (TEU)			Seaborn Trade (TEU)			
	Cabotage	Export	Total	Cabotage	Import	Total	Seborn Trade	Transit Handling	Total	Change %
2006	14.008	1.809.433	1.823.441	6.913	1.840.649	1.847.562	3.671.003	184.921	3.855.924	15%
2007	34.005	2.152.014	2.186.019	27.128	2.224.653	2.251.781	4.437.800	120.427	4.558.227	18%
2008	86.867	2.429.820	2.516.687	82.934	2.474.773	2.557.707	5.074.394	117.353	5.191.747	14%
2009	70.329	2.131.948	2.2.02.277	71.696	2.117.764	2.189.460	4.391.737	12.542	4.404.279	-15%
2010	104.278	2.306.587	2.410.865	104.047	2.354.304	2.458.351	4.869.216	874.239	5.743.455	30%
2011	154.338	2.690.889	2.845.227	305.256	2.770.190	3.075.446	5.461.079	757.171	6.218.250	8%
2012	236.905	2.879.122	3.116.027	235.440	2.942.562	3.178.001	5.821.683	898.368	6.720.051	8%
2013	274.589	3.165.653	3.440.242	269.908	3.199.969	3.469.877	6.365.622	989.815	7.355.437	9%
2014	266.997	3.488.008	3.755.005	260.067	3.581.811	3.841.878	7.069.819	754.238	7.824.057	6%
2015	305.882	3.394.508	3.700.390	300.182	3.454.345	3.754.527	6.848.854	691.481	7.540.335	-4%
2016	365.517	3.543.804	3909321	372.795	3.607.086	3.979.881	7.150.890	872.772	8.023.662	6%
2017	467.384	3.866.874	4.334.258	468.137	3.975.205	4.443.341	7.842.079	1.232.937	9.075.015	13%
2017 Container Handling 10.010.536 TEU										

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

Graph (29): Container Handling 2006-2017 (TEU)

Table (42): Position at the 18 Country Container Foreign Trade Handling (TEU) 2017

Country	Export	Import	Seaborn Trade	Transit Handling	Total
Egypt	495.202	689.391	1.184.592	58.373	1.242.965
Greece	406.186	735.716	1.141.902	169.660	1.311.562
Italy	363.298	266.220	629.518	40.220	669.738
Israel	203.996	277.169	481.166	11.209	492.374
Belgium	187.690	221.832	409.522	12.001	421.523
Spain	302.687	94.322	397.009	28.730	425.739
Malta	173.056	199.351	372.408	7.043	379.451
Chine	198.898	167.380	366.278	153.522	519.800
Lebanon	84.071	208.023	292.093	16.741	308.834
U.K.	190.446	41.686	232.132	5.582	237.714
Russia	102.231	120.669	222.900	125.737	348.637
Singapore	114.636	107.491	222.127	31.370	253.497
Saudi Arabia	128.810	67.664	196.474	26.140	222.614
Romania	93.194	78.265	171.460	110.970	282.429
Korea Re.of	58.230	112.650	170.880	23.459	194.338
Georgia	55.284	90.730	146.014	94.817	240.831
U.S.	64.929	57.540	122.469	1.575	124.044
Algeria	40.449	63.535	103.984	18.064	122.048
Other	603.581	375.572	979.153	297.725	1.276.878
Total	3.866.874	3.975.205	7.842.079	1.232.937	9.075.015

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

As of 2017, the countries which Turkey performed foreign trade with / conducted transit container transportation are as follows: Greece (14,4%), Egypt (13,6%) and

Italy (7,3%). The top 18 countries data of the foreign trade / transit container transportation of top 18 countries are shown in the Table (42).

Vehicle Transportation Through RO-RO Lines

Ro-Ro lines of Turkey in 2017 are shown below.
The Table (43) above shows the amounts of the transported full vehicles (export and import) in 2017.

Table (43): RO-RO Lines Transported Vehicles 2017

Regions	Ro-Ro Lines	Incoming Vehicle	Outbound Vehicle	Total Vehicle
European	TUZLA(PENDİK) - TRIESTE	62.557	53.651	116.208
	TUZLA(PENDİK) - BARİ	0	2.764	2.764
	TUZLA(PENDİK)-ANCONA	0	841	841
	AMBARLI-TRIESTE	2.972	13.523	16.495
	TUZLA(PENDİK)-TOULEN	35.397	34.556	69.953
	MERSİN - TRIESTE	20.869	21.472	42.341
	ÇEŞME - TRIESTE	23.691	28.697	52.388
	İSTANBUL(HAYDARPAŞA)-TRIESTE	27.657	27.895	55.552
	İSTANBUL(HAYDARPAŞA)-SETE	396	382	778
	YALOVA-LAVRIO-TRIESTE	8.927	9.843	18.770
	İZMİR(ALSANCAK)-TRIESTE	3.416	5.117	8.533
	İZMİR(ALSANCAK)-SETE	7.288	7.225	14.513
	GEMLİK(BORUSAN)- ZEEBRUGGE	2	547	549
	İZMİT-ZEEBRUGGE	0	808	808
	Total	**193.172**	**207.321**	**400.493**
Black Sea	SAMSUN - NOVOROSSİYSK	3.305	3.498	6.803
	SAMSUN-GELİNCİK	5.484	5.432	10.916
	SAMSUN TUAPSE	1.642	1.670	3.312
	ZONGULDAK-CHORNOMORSK (ILYICHEVSKY)	8.109	7.500	15.609
	İSTANBUL(HAYDARPAŞA)-CHORNOMORSK (ILYICHEVSKY)	9.877	8.812	18.689
	SAMSUN - KAVKAZ TREN FERİ HATTI	264	245	509
	Total	**28.681**	**27.157**	**55.838**
Mediterranean	TAŞUCU-TRİPOLİ	9.890	9.898	19.788
	TAŞUCU - GİRNE	7.095	7.146	14.241
	MERSİN - HAIFA	751	1.039	1.790
	MERSİN - MAGUSA	16.193	15.786	31.979
	MERSİN-GİRNE	5.172	5.635	10.807
	İSKENDERUN - DHUBA	2.575	2.676	5.251
	Total	**41.676**	**42.180**	**83.856**
Other		**627**	**1.487**	**2.114**
Total		**263.529**	**276.658**	**542.301**

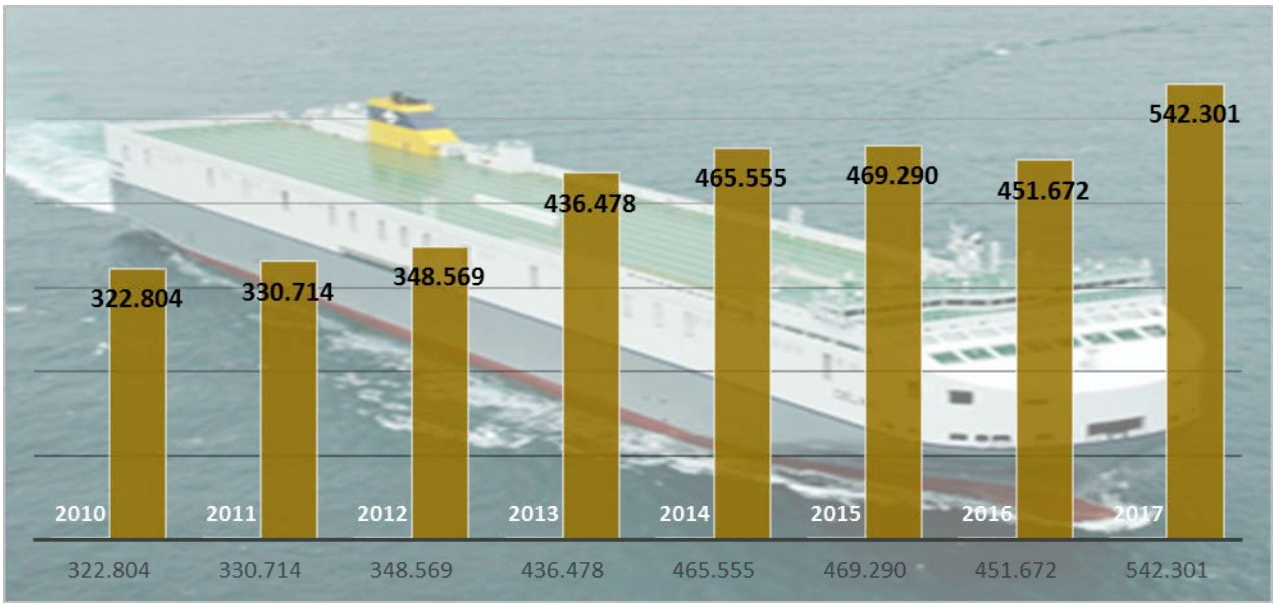
Source: *Republic of Turkey Ministry of Transport, Maritime Affairs and Communications*

In Europe (14 lines) totally regional 404.493 vehicles have been transported in 2017. (74%)

In Black Sea (6 lines) totally regional 55.838 vehicles have been transported in 2017. (10%)

In Mediterranean (6 lines) totally regional 83.856 vehicles have been transported in 2017. (16%)

Graph (30): RO-RO Lines Transported Vehicles (2010- 2017)



The majority of the transported vehicles by Regions are, 74% the European Region, 10% Black Sea Region, and 16% Mediterranean Region in 2017.

Graph (31): RO-RO Lines Transported Vehicles (2017)

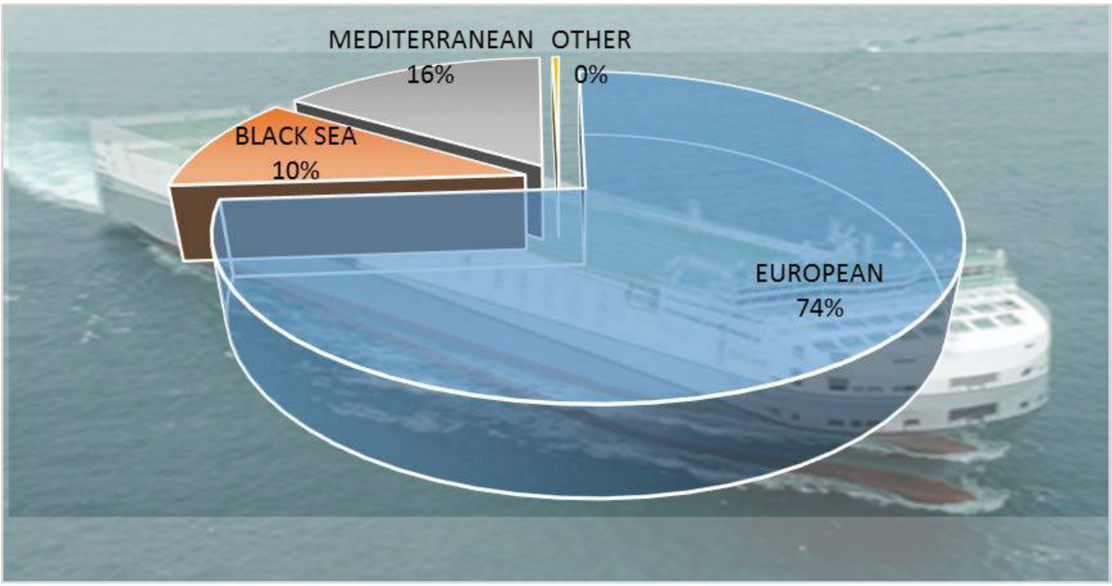
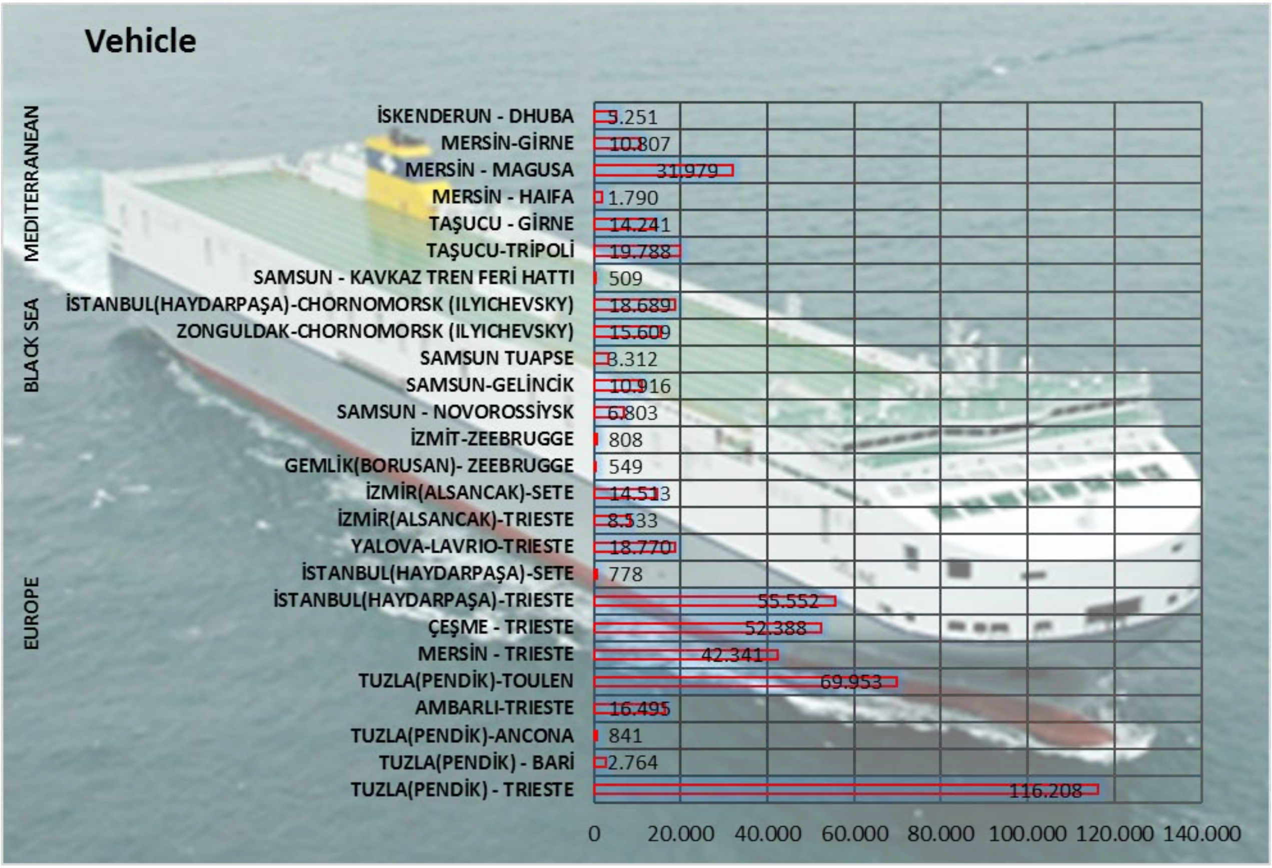


Table (44): 2017 RO-RO Ships On Regular Line With Carrying Car/Vehicle Number

HARBOR MASTER		PORT	Incoming Vehicles	Outgoing Vehicles	Total Vehicles
AYVALIK	1	Ayvalik Ferry Pier	2.321	2.278	4.599
ÇEŞME	2	Ulusoy Port	2.663	2.695	5.358
GEMLİK	3	Gemlik Municipality Pier	461	42	503
	4	Gemlik Borusan Port	52.933	246.627	299.560
	5	Gemlik BP Terminal	0	1.427	1.427
	6	Gemlik Gemport Port	27.129	316.219	343.348
İSKENDERUN	7	Limak Port İskenderun	4.740	274	5.014
İZMİR	8	İzmir TCDD Alsancak Port	2.226	17.263	19.489
İZMİT	9	Derince Safi Port Terminal	109.302	245.755	355.057
	10	Kocaeli Autoport Port	199.946	188.202	388.148
	11	Kocaeli Efesanport Port	188.168	6.907	195.075
	12	Kocaeli Evyap Port	0	899	899
	13	Kocaeli Ford Otosan Port	36.472	275.431	311.903
MERSİN	14	Mersin International P	9.570	1.858	11.428
TAŞUCU	15	Taşucu Municipality Port	4.369	4.878	9.247
	16	Taşucu Seka Port	4.015	5.466	9.481
TOTAL			644.315	1.316.221	1.960.536

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

Graph (32) : RO-RO Lines Transported Vehicles

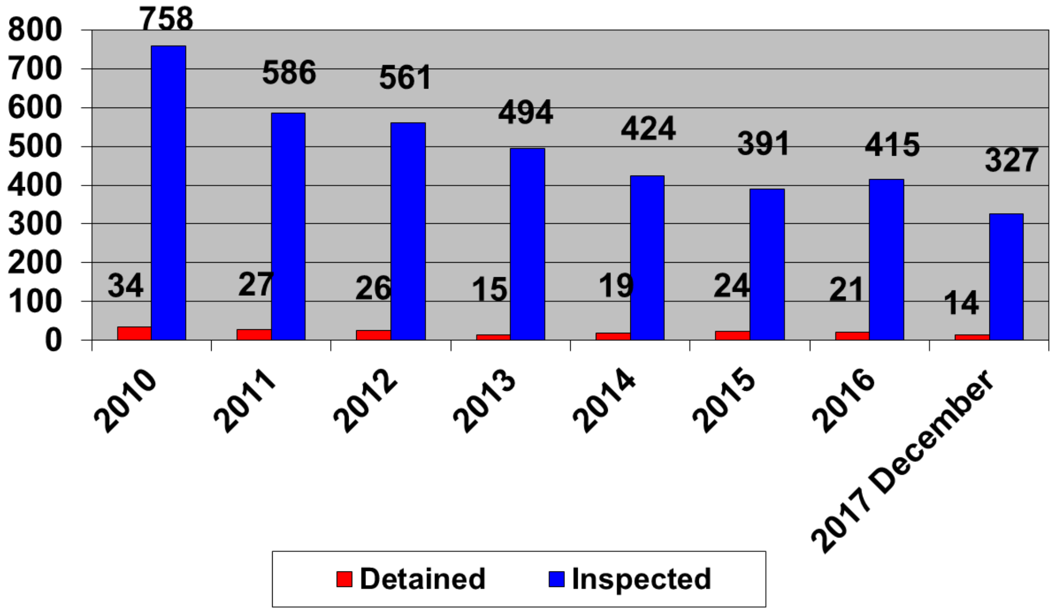


Source: *Republic of Turkey Ministry of Transport, Maritime Affairs and Communication*

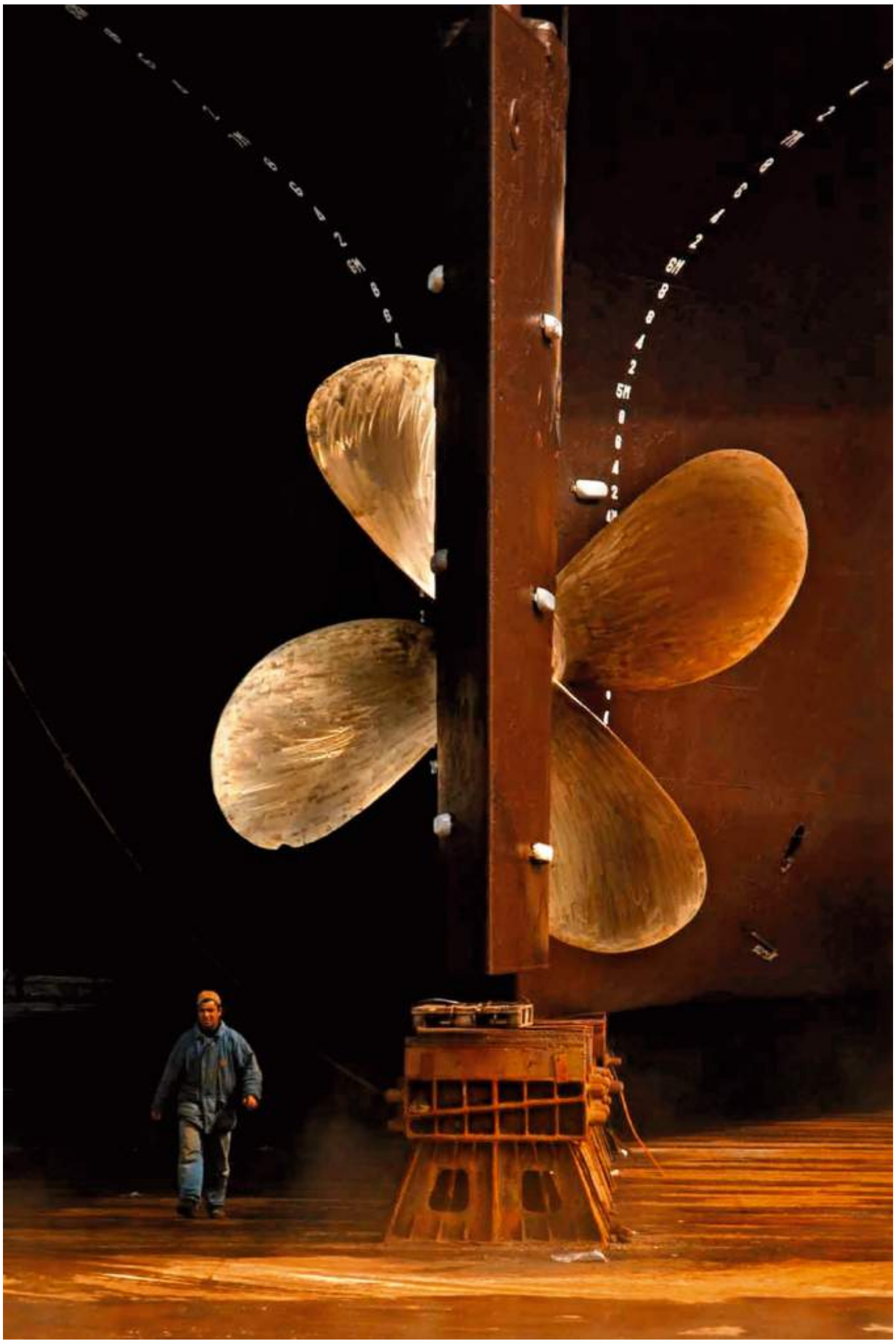
Port State Control Applications

Turkey is in the White List of Paris Memorandum. The Port State Control (PSC) is being used in eight different geographical areas of the world. Turkey is a member of the Mediterranean and Black Sea Memorandums (MoU) and is taking every measures to prevent unfair competition and increase quality in shipping. Therefore, we continue to control entries of non-standard vessels to our territorial waters.

Graph (33): Turkish Flagged Vessels Yearly Inspection / Detentions (Paris MoU)



Source: Paris MoU



SHIPBUILDING

2017

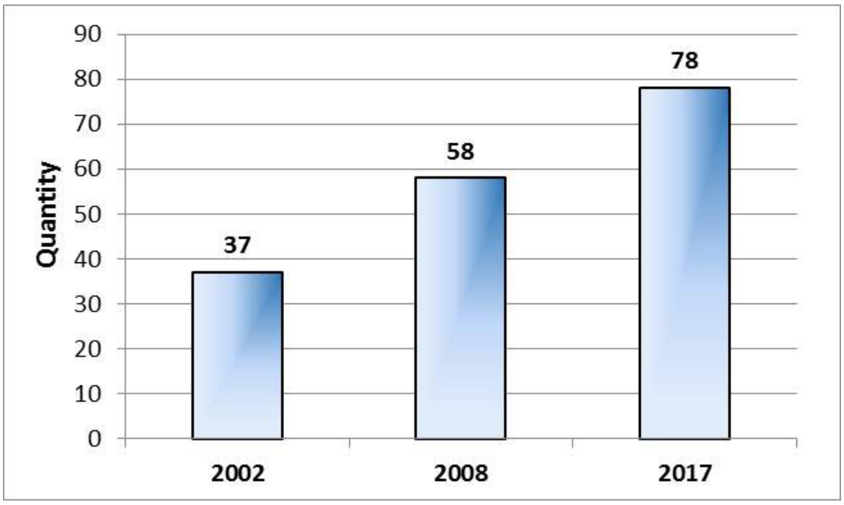
CHAPTER III

SHIPBUILDING INDUSTRY

General Outlook of theTurkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, the under operation raised up to 78 as of April 2018 while it was only 37 in 2002. The quantity of shipyards under construction are 25 and 15 areas that are defined as shipyard investment areasas of the same date mentioned above.

Graph (34): 2002 / 2017 Shipyards Under Operation



Source: Ministry of Transport, Maritime Affairs and Communications 04/2018

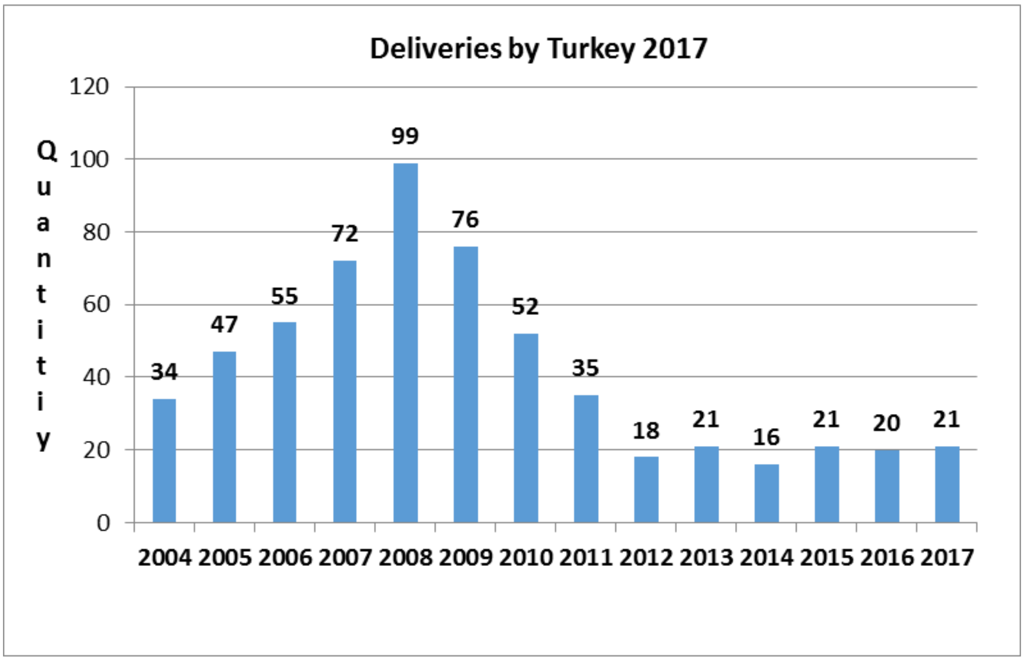
<u>Shipbuilding industry is a branch of heavy industry which provides;</u>

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

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

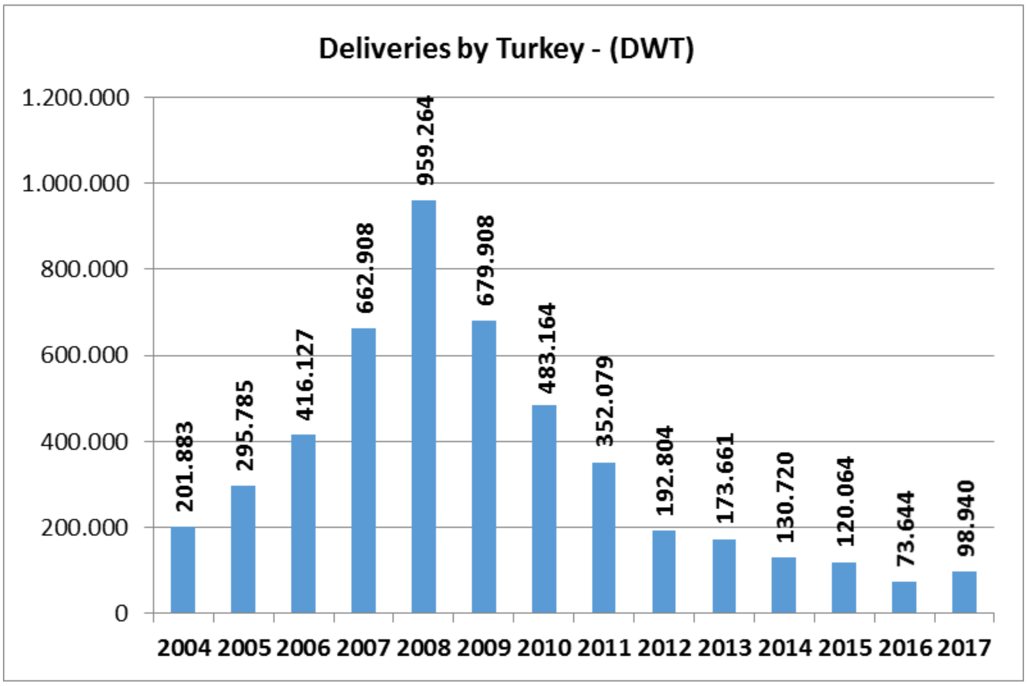
In 2017, 21 ships DWT of 98.940 tons have been delivered.

Graph (35): Number of Ships Delivered Between 2004-2017



Source: Clarkson Research Services 04/2018

Graph (36): DWT of Ships Delivered Between 2004-2017

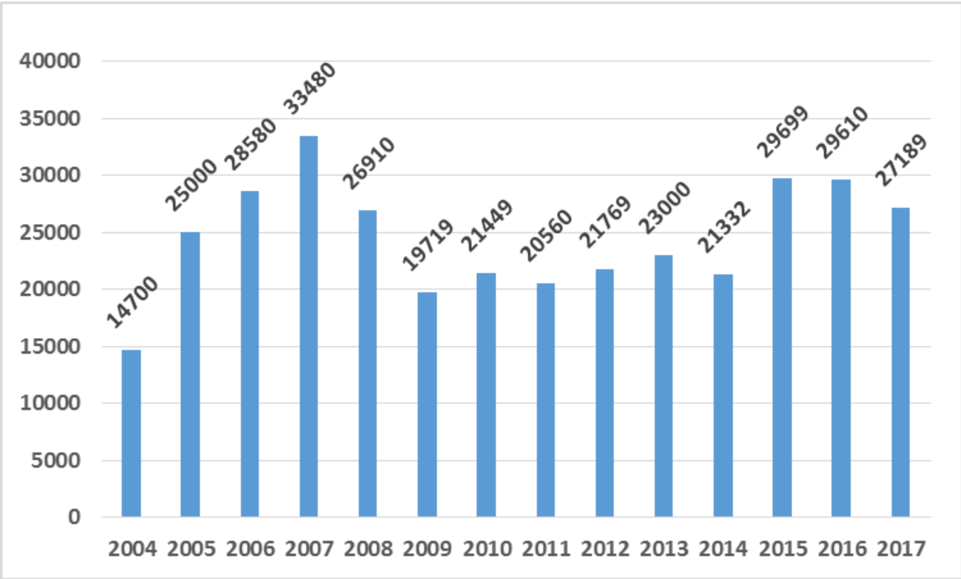


Source: Clarkson Research Services 04/2018

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

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

Graph (37): Employee Numbers in Turkish Shipyards by 2017



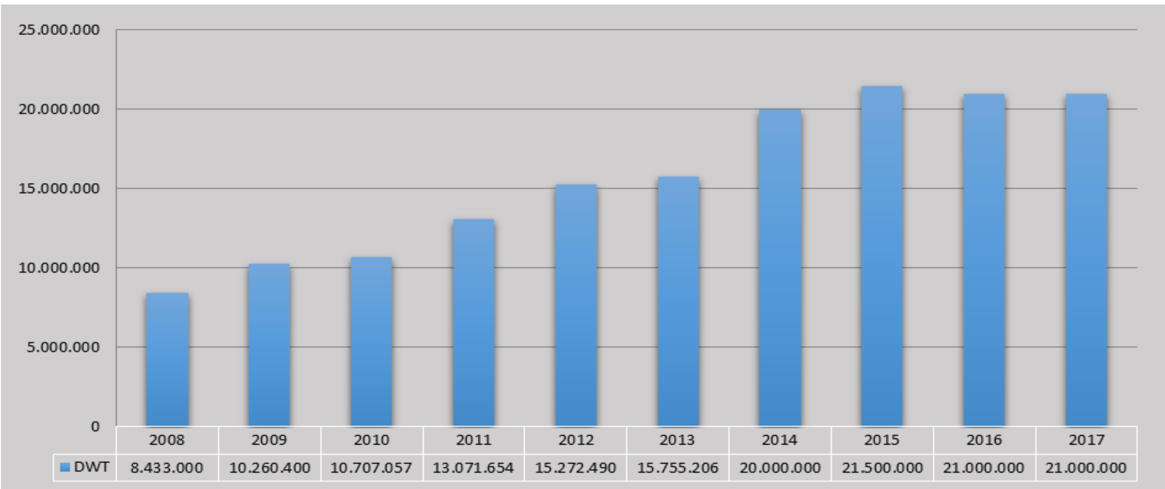
(*2017 data includes harbor launch and manufacture place workers)
Source: Ministry of Transport, Maritime Affairs and Communications 04/2018

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

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

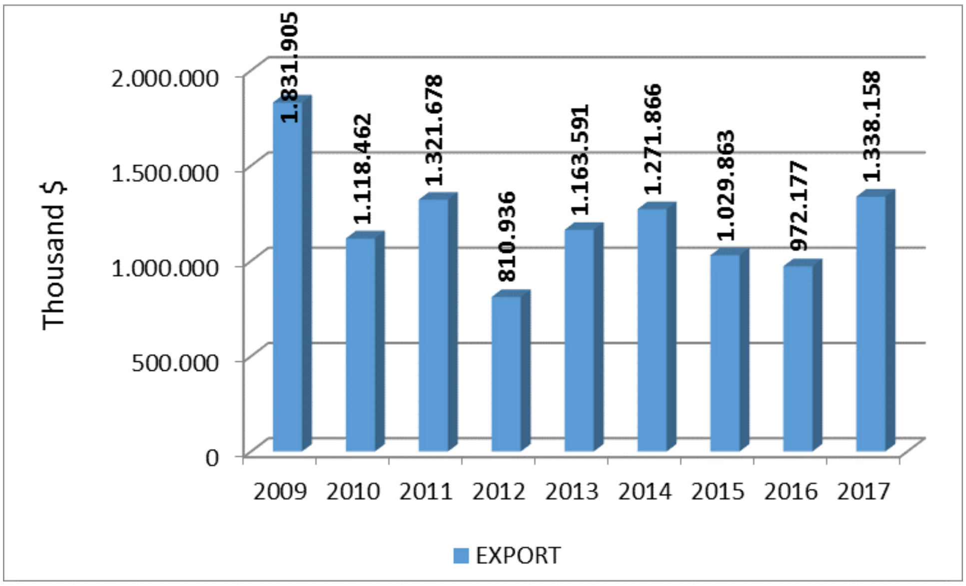
By the end of 2012, orders in our yards was decreased to 0,5 million DWT. Due to the lack of new orders, the shipyards are now mostly concerned, with repair and maintenance facilities. In 2013, in Turkish shipyards 15.755.206 DWT of repair and maintenance had been done. As of 2014, it was approximate 20.000.000 DWT and in 2017 it raised up to 21.000.000 DWT.

Graph (38): Repair and Maintenance Facilities According to Years (2017)



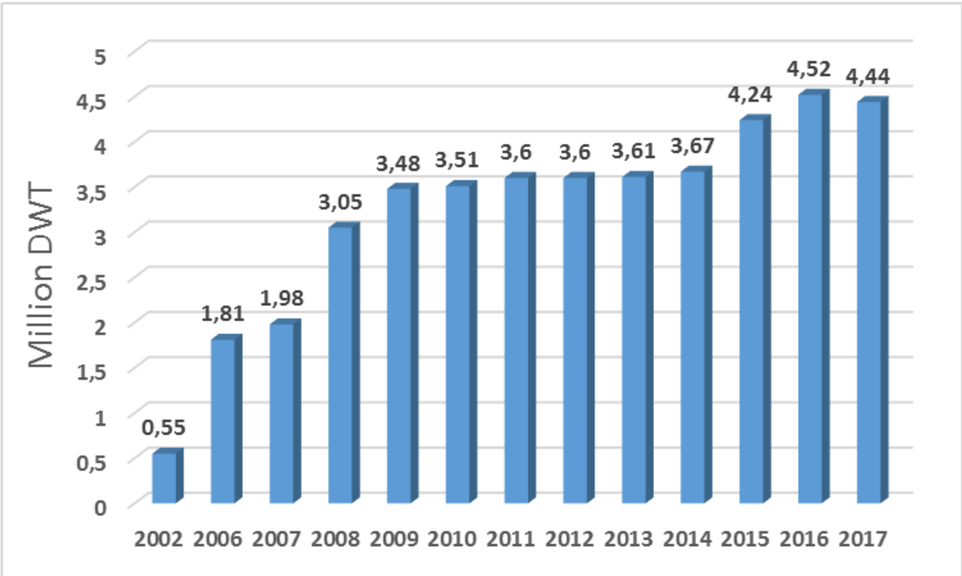
Source: Turkish Shipbuilders'Association (GİSBİR)

Graph (39): Export Figures of Turkish Shipbuilding Industry (2009-2017)



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

Graph (40): Shipyards Project Capacities Between 2002-2017



Source: Ministry of Transport, Maritime Affairs and Communications 04/2018

In 2002, our shipyard's capacity was 550.000 DWT. In 2017 it has reached up to 4,44 million DWT which means a growth more over 6 times than 2002.

As of April 2018, 30 floating docks and 10 dry docks are operative in Turkey.

Table (45): Floating and Dry Docks in Turkey

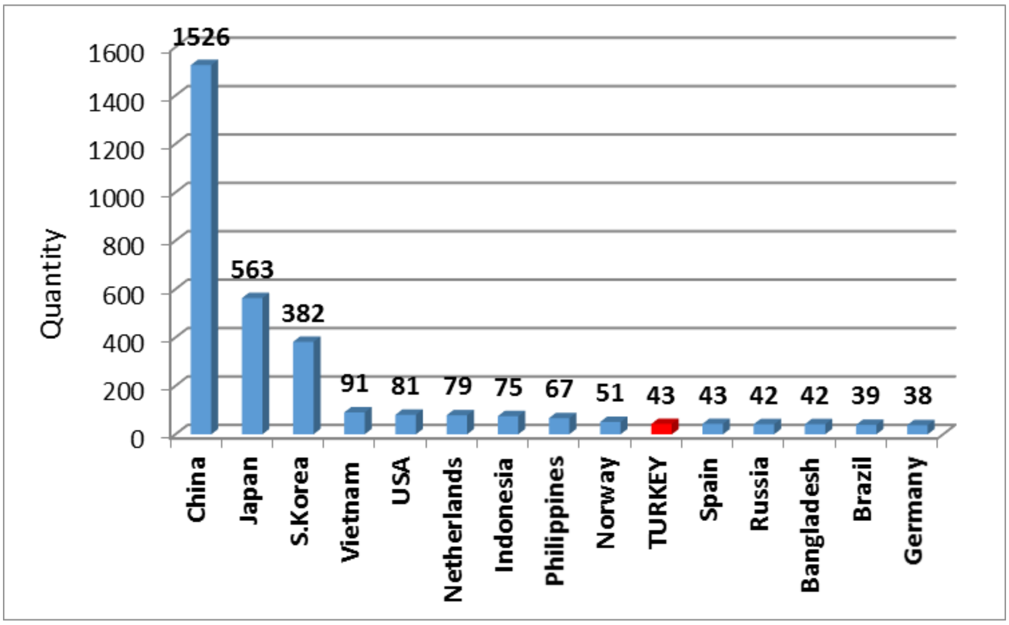
NO	City	Operator	Floating /Dry Dock	Dimensions	Lifting Capacity (Tons)	Built
1	İSTANBUL	DENTAŞ İNŞA ve ONARIM SAN. A.Ş.	Floating Dock	128x30 m	5.000	1991
2	İSTANBUL	GİSAN GEMİ İNŞA SAN. ve AŞ.	Floating Dock	167x34 m	9.000	2012
3	İSTANBUL	ÇEKSAN GEMİ İNŞA ÇELİK KONS. SAN. ve TİC. A.Ş.	Floating Dock	130x29 m	7.000	1958
4	İSTANBUL	YARDIMCI GEMİ İNŞA A.Ş.	Floating Dock	155x36 m	8.500	1983
5	İSTANBUL	KUZEYSTAR SHİPYARD	Floating Dock	217,5x14,81 m	80.000	1963
6	İSTANBUL	KUZEYSTAR SHİPYARD	Floating Dock	197x39,6 m	45.000	1960
7	İSTANBUL	TORLAK DENİZCİLİK SAN ve TİC. A.Ş.	Floating Dock	67x28,4 m	7.500	1962
8	İSTANBUL	İSTANBUL DENİZCİLİK GEMİ İNŞA SAN. ve TİC. A.Ş.	Floating Dock	93x28 m	4.200	1969
9	İSTANBUL	SNR GEMİ İNŞA SANAYİ A.Ş.	Floating Dock	129x38 m	8.600	1967
10	İSTANBUL	DESAN DENİZ İNŞAAT SANAYİ A.Ş.	Floating Dock	172x36 m	19.000	1963
11	İSTANBUL	DESAN DENİZ İNŞAAT SANAYİ A.Ş.	Floating Dock	232x52	49.500	1914
12	İSTANBUL	DESAN 5442 NOLU PARSEL	Floating Dock	178x36 m	19.000	1939
13	İSTANBUL	GEMAK GEMİ İNŞAAT SANAYİ ve TİC.A.Ş.	Floating Dock	233x45 m	28.000	1961
14	İSTANBUL	GEMAK GEMİ İNŞAAT SANAYİ ve TİC.A.Ş.	Floating Dock	170x33 m	9.000	1995
15	İSTANBUL	HİDRODİNAMİK GEMİ SAN. ve TİC. A.Ş.	Floating Dock	115x22 m	2.750	1965
16	İSTANBUL	GEMSAN GEMİ ve GEMİ İŞLETMECİLİĞİ SAN. ve TİC. LTD. ŞTİ.	Floating Dock	220x45 m	20.000	1981
17	İSTANBUL	ÇİNDEMİR MAKİNE GEMİ ONARIM ve TERSANECİLİK A.Ş.	Floating Dock	123x28 m	5.000	1964
18	İSTANBUL	ERKAL ULUSLARARASI NAKLİYAT ve TİCARET A.Ş.	Floating Dock	350x80 m	100.000	1998
19	İSTANBUL	TORGEM GEMI INSAAT SAN. VE TIC. A.S.	Floating Dock	53x20 m	2.500	1999
20	İSTANBUL	TURQUOISE YAT SAN. AŞ	Floating Dock	66x27 m	2.500	2016
21	İSTANBUL	TERSAN TERSANECİLİK ve TAŞIMACILIK SAN. ve TİC. A.Ş.	Floating Dock	130x30 m	7.100	
22	YALOVA	BEŞİKTAŞ GEMİ	Floating Dock	230x37 m	22.000	2007
23	YALOVA	BEŞİKTAŞ GEMİ	Floating Dock	382x66 m	70.000	1974
24	YALOVA	TERSAN TERSANECİLİK SAN ve TİC AŞ	Floating Dock	178x35 m	9.000	2013
25	YALOVA	DOĞRUYOL TERSANECİLİK SAN. ve TİC. AŞ.	Floating Dock	123x30 m	5.500	1993
26	YALOVA	HAT-SAN GEMİ İNŞAA BAKIM-ONARIM DEMİR NAK. SAN. ve TİC. A.Ş.	Floating Dock	180x30 m	10.000	2017
27	YALOVA	SANMAR TERSANESİ	Floating Dock	84x34 m	3.500	2015
28	YALOVA	SEFİNE DENİZCİLİK TERSANESİ SAN. ve TİC. A.Ş.	Floating Dock	240x57 m	11.227	1973
29	KOCAELİ	UZMAR GEMİ İNŞ. SAN. ve TİC. A.Ş.	Floating Dock	68x38 m	2.000	1973
30	KASTAMONU	INEBOLU DENIZCILIK SAN. ve TIC. A.S.	Floating Dock	118x29 m	4.500	1969
TOTAL 30 FLOATING DOCKS, TOTAL CAPACITY 576.877 Tonnes						

NO	City	Operator	Floating / Dry Dock	Dimensions
1	İSTANBUL	İSTANBUL ŞEHİR HATLARI(HALİÇ)	Dry Dock	109x22,5
2	İSTANBUL	İSTANBUL ŞEHİR HATLARI(HALİÇ)	Dry Dock	81,5x17
3	İSTANBUL	İSTANBUL ŞEHİR HATLARI(HALİÇ)	Dry Dock	151x16
4	İSTANBUL	URSA GEMİCİLİK BAKIM ONARIM TERSANECİLİK SAN. TİC. AŞ.	Dry Dock	56x14 m
5	İSTANBUL	İSTANBUL TERSANE KOMUTANLIĞI (PENDİK TERSANESİ)	Dry Dock	300X69
6	İSTANBUL	TUZLA GEMİ ENDÜSTRİSİ AŞ.	Dry Dock	300x53 m
7	İSTANBUL	SEDEF GEMİ İNŞAATI AŞ.	Dry Dock	315x50 m
8	İSTANBUL	DENİZ ENDÜSTRİSİ AŞ.	Dry Dock	210x37 m
9	YALOVA	SEFİNE DENİZCİLİK TERSANECİLİK TURİZM SAN. ve TİC. AŞ.	Dry Dock	240x40 m
10	YALOVA	BEŞİKTAŞ GEMİ (A-10)	Dry Dock	235x40x6,5 m

Source: Ministry of Transport, Maritime Affairs and Communications 04/2018

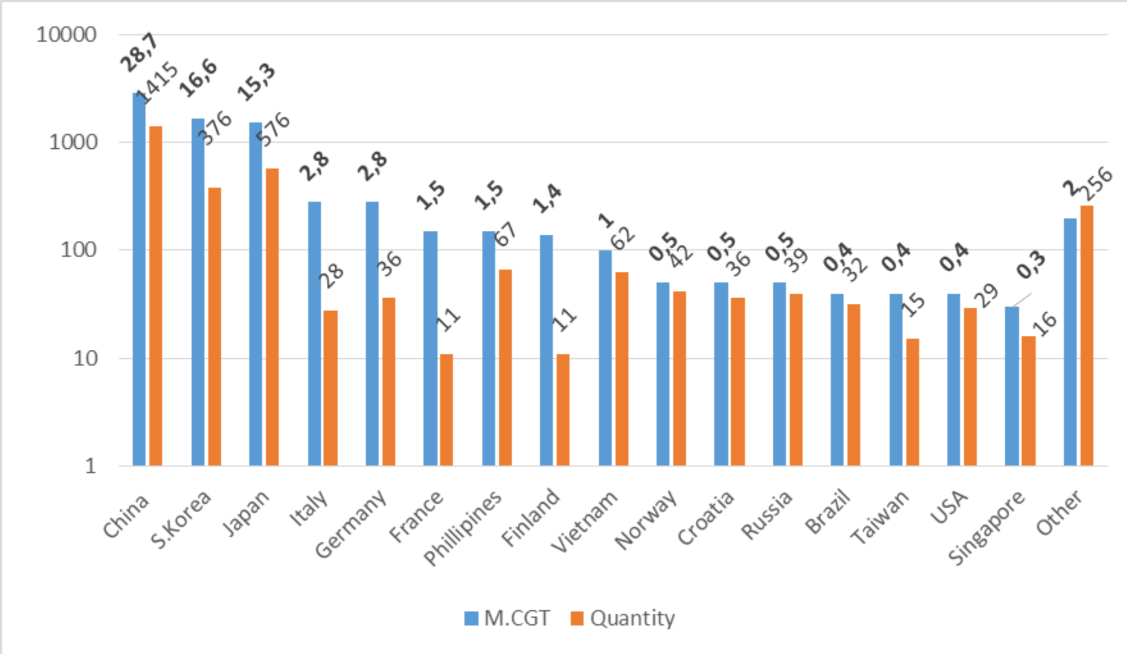
According to quantity, Turkish shipyards are in the 10 th place in the world ranking.

Graph (41): Orderbook by Builder Country (Quantity)



Source: Clarkson Research Services 04/2018

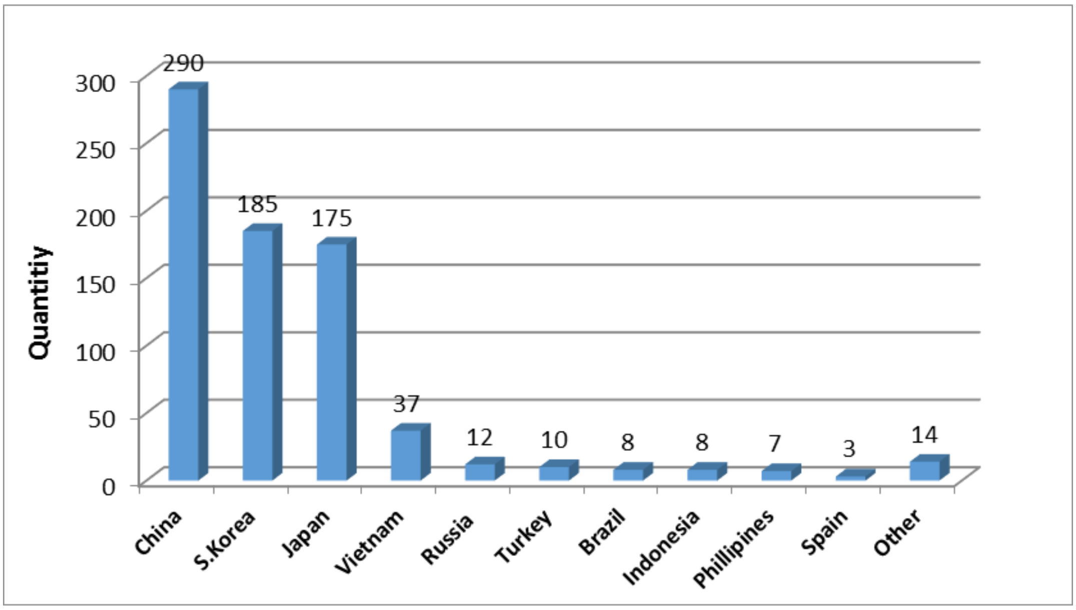
Graph (42): Orderbook by Builder Country (Quantity/Tonnage - Million CGT)



Source: Clarkson Research Services 04/2018

Our shipyards have a good reputation in building of small and medium tonnage chemical tankers. By April 2018, Turkey was in the 6th place among the countries which take tanker orders.

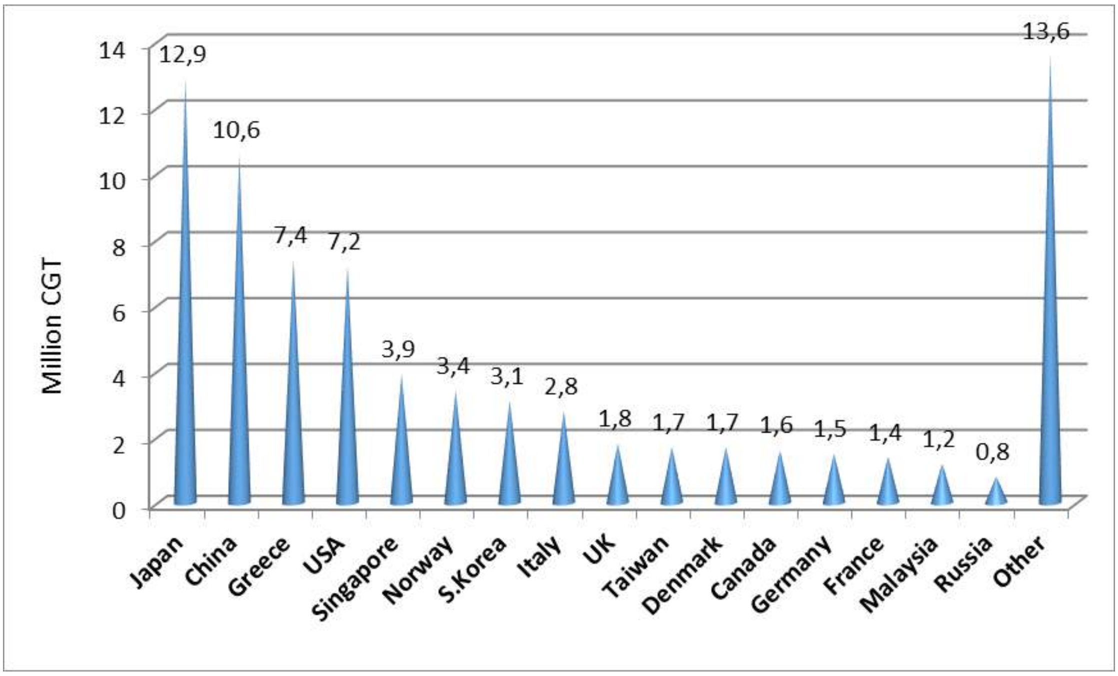
Graph (43): Tanker Orders by Builder Country



Source: Clarkson Research Services 04/2018

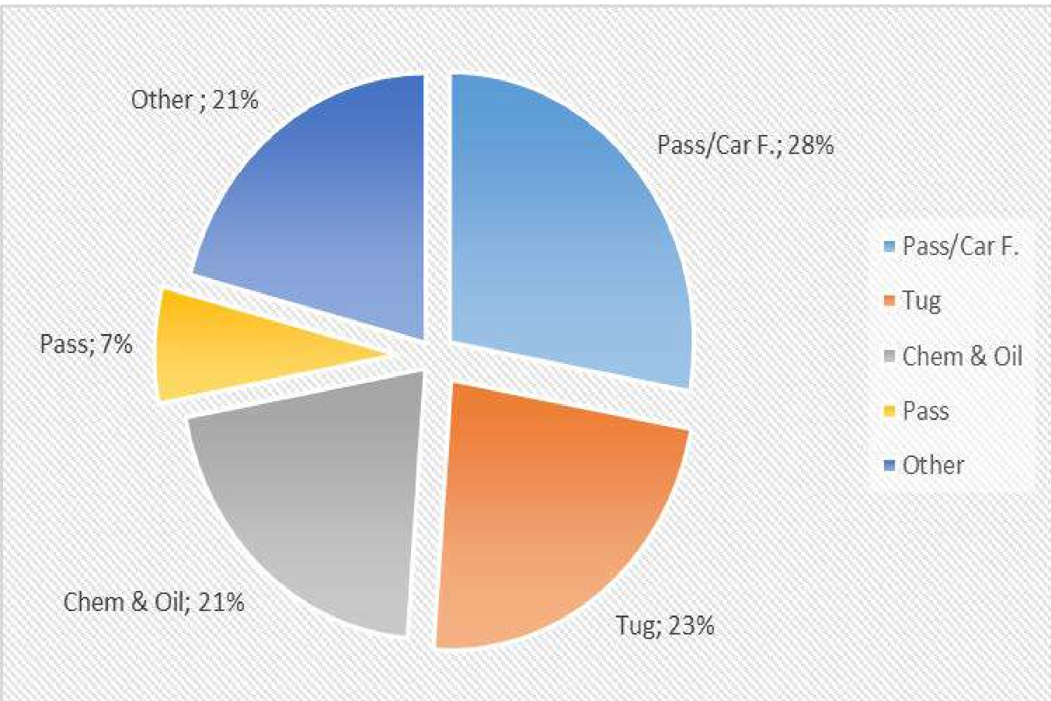
Turkish ship-owners worldwide orders consist of 24 ships about 0,8 million DWT as of April 2018.

Graph (44): Orderbook by Owner Country



Source: Clarkson Research Services 04/2018

Graph (45): Distribution of Orders According to Shiptype in Turkish Shipyards



Source: Clarkson Research Services 04/2018

Defence Industry Projects

Projects about the defence industry have gained a great accelaration witihin the last few years. Especially with the significiant achivements of the MİLGEM Project, Turkish shipyards have started to take orders from abroad for the naval shipbuilding projects in which high ratio of local industry participation exists. It is known that there are approximately 162 countries which have the naval forces around the World. Turkey is one of the 10 countries which has the ability of designing, building and maintainig a naval ship.The progress in the field of defence industry projects, that was mostly foreign-dependent in the past, can be clearly seen correspondingly with the level that Turkish Shipbuilding industry has been reached now. Today Turkey's naval needs are provided by the Shipyards of its own country.

Naval platform projects in the defence industry;

1. **MİLGEM (National Ship)**

The Project consist of 8 ships. The first two ships, the TCG-HEYBELIADA and TCG-BÜYÜKADA are currently serving for the Naval Forces Command. The third ship, the TCG-BURGAZADA was launched on 18th June 2016, and the fourth ship, the TCG-KINALI was launched on 3rdJuly 2017 with test activities in progress.
There are ongoing works to procure the design and building by Istanbul Shipyard Command of the 5. ship, the first of 5-8.ships, that will be, unlike the first four corvette class ships, frigate class and the design and construction by private sector shipyards of the 6-8. ships.

2. **Multi-Purpose Amphibious Assault Ship (LHD)**

The Multi-Purpose Amphibious Assault Ship is planned to be built with a total/full displacement of 27,436 tons, 231 meters in length and will be the largest naval platform in the inventory of our Armed Forces.

3. **Amphibious Ship (LST)**

While the construction of the first ship, the TCG-BAYRAKTAR, was realized with 70.68% domestic industry participation, the share of SME's in domestic industry participation was approximately 48%.
The second vessel in the program, the" TCG SANCAKTAR", is planned to be delivered to the Turkish Naval Forces in 2017 upon the completion of sea acceptance tests.

4. **Submarine Rescue Mother Ship (MOSHIP)**

The building of the TCG ALEMDAR Submarine Rescue Mother Ship (MOSHIP) started in 2011 and it has the most advanced technologies in the world.

5. **Coast Guard Search & Rescue Boat**

6. **New Type Patrol Boat (YTKB)**

Within the scope of the Project, preliminary and final deliveries of all sixteen New Type Patrol Boats have been completed. Contracting activities will continue until March 2018.

**Based on the information of Presidency of The Republic of Turkey Undersecretariat for Defence Industries web site. (https://www.ssm.gov.tr/WebSite/contentlist.aspx?PageID=88&LangID=2)*

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.
Turkey; 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;

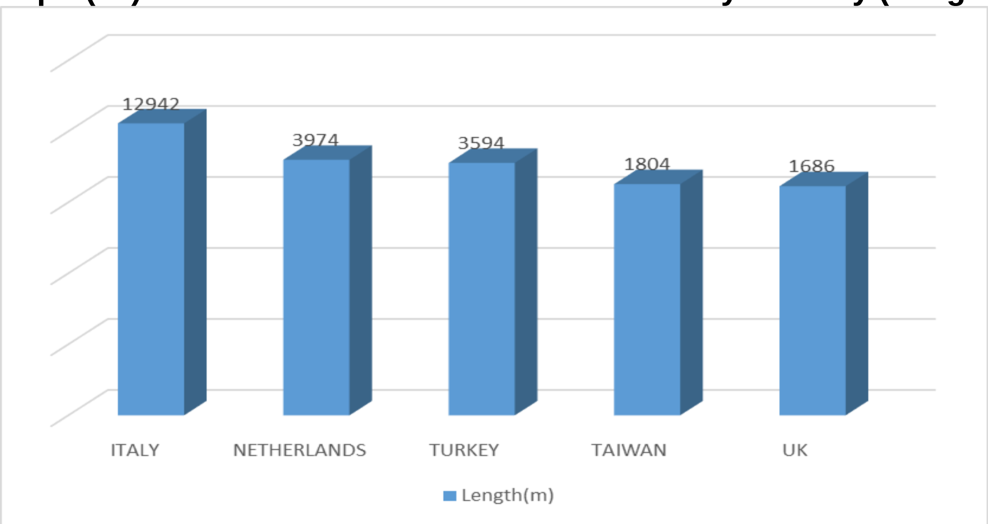
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to theinternational markets
- Appropriate climate
- Our country's potential in boat&yacht building

Main disadvantages are;

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

Turkey is keeping the third place in global order book by the total length of 3594 meters by the end of 2017.

Graph (46): 24 Meters and Above Yacht Orders by Country (Length)



Source: Boat International (www.boatinternational.com)

Sub- Industry

In parallel withto the improvements ofn the recent years, theTurkish sub-industry is in progress, but still some of the items are imported by the shipyards due to the lack of production. Sub-industry which is 20% percent of the ship's price, is one of the most important branches in the shipbuilding industry. It has the highest employment value in sub-sectors. Employment in sub-industry is 33.000 persons in Japan, 65.000 persons in S. Korea and 262.000 persons all over the Europe. Main problem of sub-industry in Turkey is to be made by local and small enterprises which cause problems about standardizing and approving the products.

Turkish sub-industry regarded as one of the best in supplying anchor, chain, bollard, electric cables, and hydraulic units, but in electronic equipment especially in navigational systems, due to their producers are a few worldwide, sector needs to obtain them from the import resources. Steel sheet production in Turkey can also meet onlythe small amount of the requests.
Turkish Sub-industry is able to produce;
Anchor, chain, bollard, locking equipments - Windlass and equipments - Valves and Central heating Systems - Electric Panels and Tables - Fire Fighting Systems - Pumps - Isolation Equipments - Pipes – Refrigerated Units - Hatch Covers - Diesel generator – Boiler - Carpenter and furnishings.

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

Sub-industry creates employment as 1 to 3. In 2002 employment in sub-industry was 30.000 people and it raised to 103.500 but unfortunately due to the global economic crisis it decreased to 57.537 by the end of 2009. By the end of 2014 it had been estimated to be around 50.000 people working in the sub-industry.

Table (46): Order book of Turkish Shipyards as of April 2018

	Hull No.	Type	Dwt	GT	Size	Unit	CGT	Built	Builder	Contract Date	Owner
1	N/A	Pass/Car F.		1.500		Passengers	3.597	2019-10	Cemre Shipyard	2018-Mar-05	Fjord1 AS
2	N/A	Pass/Car F.		1.500		Passengers	3.597	2019-11	Cemre Shipyard	2018-Mar-05	Fjord1 AS
3	33	Pass/Car F.		2.990	299	Passengers	5.871	2019-07	Sefine Shipyard	2018-Şub-01	Fjord1 AS
4	35	Pass/Car F.		2.990	299	Passengers	5.871	2019-11	Sefine Shipyard	2018-Şub-01	Fjord1 AS
5	34	Pass/Car F.		2.990	299	Passengers	5.871	2019-09	Sefine Shipyard	2018-Şub-01	Fjord1 AS
6	1079	Pass/Car F.		2.950	299	Passengers	5.815	2019-05	Tersan Shipyard	2018-Şub-01	Fjord1 AS
7	N/A	Pass		150		Passengers	1.406	2018-01	Damen Antalya	2017-Tem-03	Aqualiner
8	N/A	Pass		150		Passengers	1.406	2018-01	Damen Antalya	2017-Tem-03	Aqualiner
9	N/A	Pass		150		Passengers	1.406	2018-01	Damen Antalya	2017-Tem-03	Aqualiner
10	N/A	GCargo	9.800		9.800	DWT	7.696	2019-	Unknown Yard /Turkey	2017-May-23	Misha Shipping
11	N/A	Tug		440	3.862	HP	2.003	2018-01	Sanmar Ltd	2017-May-22	Svitzer
12	N/A	Tug		440	3.862	HP	2.003	2018-01	Sanmar Ltd	2017-May-22	Svitzer
13	N/A	Tug		440	3.862	HP	2.003	2018-01	Sanmar Ltd	2017-May-22	Svitzer
14	N/A	Tug		440	3.862	HP	2.003	2018-01	Sanmar Ltd	2017-May-22	Svitzer
15	010	GCargo	5.500		5.500	DWT	5.310	2019-	Atlas Shipyard	2017-May-01	Unknown
16	113	Asp.& Bit.	15.000	11.909	15.000	DWT	14.655	2019-02	RMK Marine Shipyard	2017-May-01	Ditas-Denizcilik
17	008	Chem & Oil	8.400		8.400	DWT	9.182	2019-	Atlas Shipyard	2017-May-01	Unknown
18	009	Chem & Oil	8.400		8.400	DWT	9.182	2019-	Atlas Shipyard	2017-May-01	Unknown
19	114	Chem & Oil	16.000	12.017	16.000	DWT	14.728	2019-06	RMK Marine Shipyard	2017-May-01	Ditas-Denizcilik
20	NB1081	Pass/Car F.		7.000	550	Passengers	10.741	2018-09	Tersan Shipyard	2017-Şub-28	Torghatten Nord AS
21	NB1080	Pass/Car F.		7.000	550	Passengers	10.741	2018-07	Tersan Shipyard	2017-Şub-28	Torghatten Nord AS
22	NB1082	Pass/Car F.		7.000	550	Passengers	10.741	2018-11	Tersan Shipyard	2017-Şub-28	Torghatten Nord AS
23	59	Tug		270	3.753	HP	1.479	2018-05	Eregli Shipyard	2017-Şub-09	Med Marine
24	60	Tug		270	3.753	HP	1.479	2018-01	Eregli Shipyard	2017-Şub-09	Med Marine
25	57	Tug		270	3.753	HP	1.479	2019-01	Eregli Shipyard	2017-Şub-09	Med Marine
26	58	Tug		270	3.753	HP	1.479	2020-01	Eregli Shipyard	2017-Şub-09	Med Marine
27	N/A	Accom. Unit		5.000	90	Accommodation	9.038	2018-10	Cemre Shipyard	2017-Şub-07	Louis-Dreyfus Armat
28	1076	Pass/Car F.		2.700	349	Passengers	5.461	2018-06	Tersan Shipyard	2017-Şub-01	Fjord1 AS
29	24	Products		485		DWT	1.629	2018-01	Akdeniz Gemi	2017-Oca-01	Oliudreifing Ehf.
30	115	Chem & Oil	6.850	5.100	6.850	DWT	9.192	2018-11	RMK Marine Shipyard	2016-Ara-08	Pritchard-Gordon Co.
31	N/A	Pass/Car F.		7.500	1.500	Passengers	11.280	2018-09	Sefine Shipyard	2016-Eki-01	Caronte & Tourist
32	NB53	MSV	3.200	4.133	81	LOA	8.032	2018-05	Cemre Shipyard	2016-Haz-06	ESVAGT

	Hull No.	Type	Dwt	GT	Size	Unit	CGT	Built	Builder	Contract Date	Owner
33	NB52	Pass/Car F.		4.250	1.208	Passengers	7.536	2018-06	Cemre Shipyard	2016-May-06	Wightlink Ltd.
34	29	Chem & Oil	7.500		7.500	DWT	8.674	2018-07	Icdas Shipyard	2016-Oca-01	Icdas Celik Enerji
35	76	Chem & Oil	13.500		13.500	DWT	11.921	2018-	Selah Shipyard	2015-Ara-01	Atlantik Denizcilik
36	147	Chem & Oil	3.100	1.830	3.100	DWT	5.231	2018-	Selay Shipyard	2015-Haz-01	Ozpulathane Deniz
37	62	Chem & Oil	15.182	11.750	15.182	DWT	14.547	2018-04	Besiktas Shipyard	2015-Oca-01	Groupe Desgagnes
38	63	Chem & Oil	15.100	11.750	15.100	DWT	14.547	2018-07	Besiktas Shipyard	2015-Oca-01	Groupe Desgagnes
39	1068	PSV	4.500		4.500	DWT	7.226	2018-06	Tersan Shipyard	2014-Ağu-07	Sevnor Management
40	45	Tug		248		HP	1.403	2018-01	Sanmar Ltd	2014-Oca-01	Unknown
41	46	Tug		248		HP	1.403	2018-01	Sanmar Ltd	2014-Oca-01	Unknown
42	S1152	AHTS	3.400	5.000	21.760	HP	9.038	2018-08	Tersan Shipyard	2013-Ağu-01	Sevnor Management
43	48	MPP	12.107	9.000	12.107	DWT	9.163	2018-	Gelibolu Shipyd	2011-Oca-01	Albros Shipping

Source: Clarkson Research Ser. 04/2018

PORTS

2017

CHAPTER IV

PORT DEVELOPMENTS

Ports Information in General

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

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

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

The major part of the international trade is being realized through maritime transportation in Turkey. % 88,47 of goods (import-export) have been transported by maritime transportation in 2017.

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

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

Turkish ports should go into an expertising process on certain types of cargoes and/or new port projects for container handling so as to become more competitive in the Mediterranean and Black Sea markets. Recently private container terminals increased specially in the Marmara Region.
Turkish ports hold stratejic position within the Eastern Mediterranean and Black Sea Shipping Lines and at the intersection point of East-West and North-South directional international transport corridors. They are in an advantageous position to attract transshipment/transit cargoes. Ports in all regions of Turkey are located in such locationsthat they can serve to different transportation nets. The Mediterranean and Aegean Sea ports are located with little distances and have the ability to attract the main Asian-European shipping lines' cargoes passing through the Mediterranean sea. Especially, the Mediterranean ports are in a position to operate as transshipment/transit ports for delivering the cargoes coming from the main shipping lines to Middle East and Central Asian countries. Also Ports in the Marmara Region are important in terms of Turkish connection of Trans-European and Pan-European transport corridors formed by EU and extending those corridors to East. As a result of the growing trade and transport volume in Black Sea, which is the most important means of access for trading among the landlocked Central Asian countries with Europe, the importance of our ports in the area have increased.

471.173.896 tons of cargo is realized at Turkish ports in 2017.

- % 24,1 of handling is export with 113.692.068 tons.
- % 49,6 of handling is import with 233.656.024 tons.
- % 12,8 of handling is cabotage with 60.396.079 tons.
- % 13,5 of handling is transit with 63.429.725 tons.

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

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

MODE OF TRANSPORT		2013	2014	2015	2016	2017
EXPORT	TURKISH	11.660.647	12.739.297	13.754.810	15.272.855	**15.138.335**
	FOREIGN	77.893.343	75.797.517	78.397.812	79.532.265	**98.553.733**
	TOTAL	**89.553.990**	**88.536.814**	**92.152.622**	**94.805.120**	**113.692.068**
IMPORT	TURKISH	22.949.887	20.876.309	22.724.776	23.350.424	**21.677.485**
	FOREIGN	164.831.728	173.837.477	185.601.532	191.782.095	**211.978.539**
	TOTAL	**187.781.615**	**194.713.786**	**208.326.308**	**215.132.519**	**233.656.024**
CABOTAGE	LOADING	26.076.342	24.982.892	25.894.384	26.249.991	**29.898.010**
	UNLOADING	27.861.596	25.746.316	26.578.284	27.050.225	**30.498.069**
	TOTAL	**53.937.938**	**50.729.208**	**52.472.668**	**53.300.216**	**60.396.079**
TRANSIT	LOADING	46.930.435	44.278.082	58.597.204	61.436.179	**55.544.396**
	UNLOADING	6.726.780	4.833.478	4.487.893	5.527.128	**7.885.329**
	TOTAL	**53.657.215**	**49.111.560**	**63.085.097**	**66.963.307**	**63.429.725**
GR.TOTAL	LOADING	162.560.767	157.797.788	176.644.210	182.491.290	**199.134.474**
	UNLOADING	222.369.991	225.293.580	239.392.485	247.709.872	**272.039.422**
	TOTAL	**384.930.758**	**383.091.368**	**416.036.695**	**430.201.162**	**471.173.896**

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

Graph 47: Cargo Handling Figures According To Years

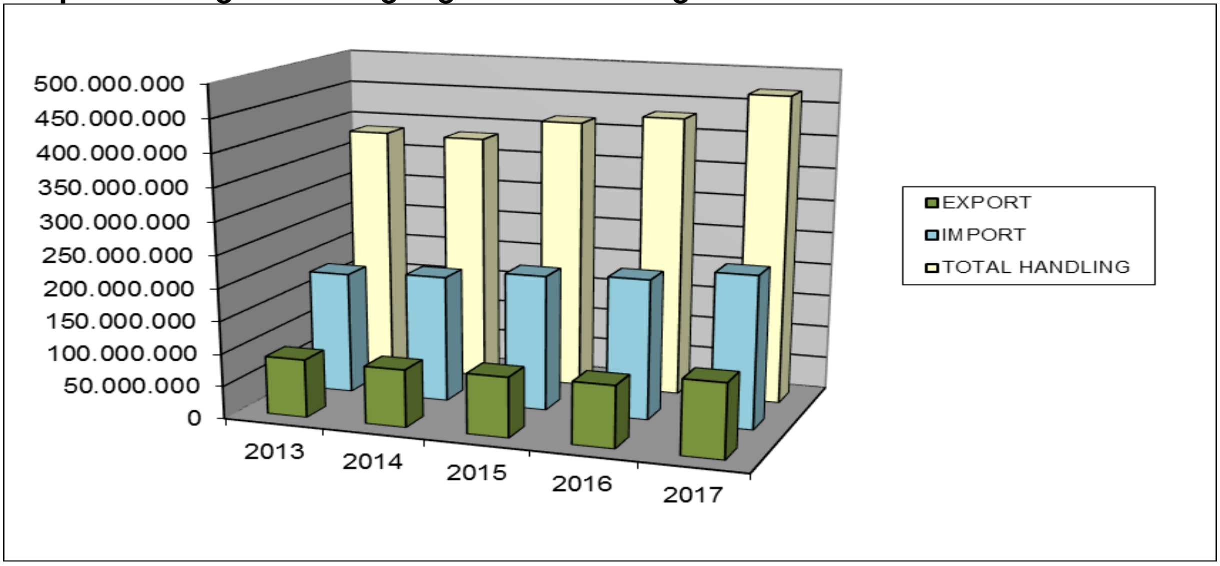
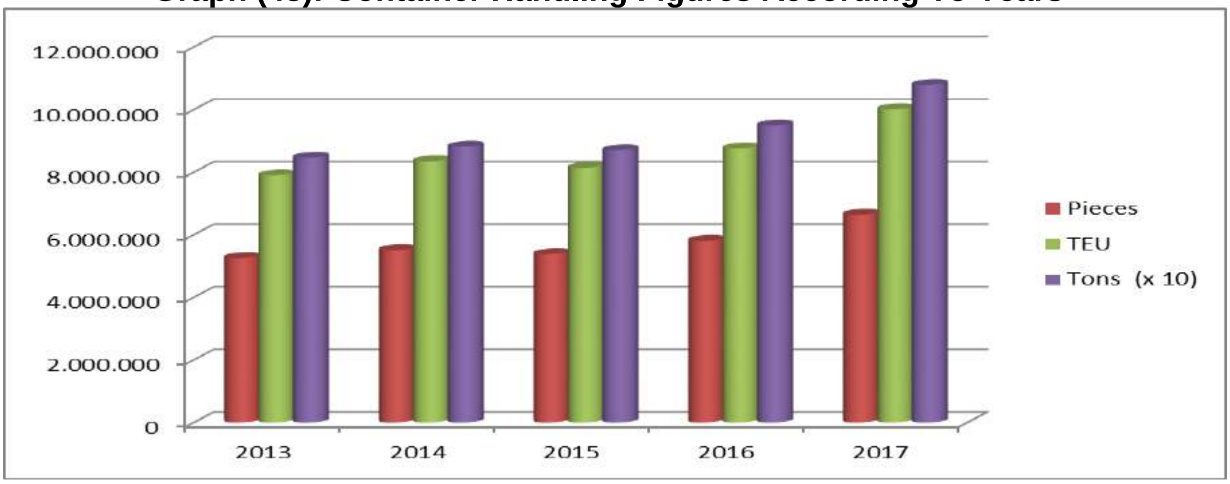


Table (48): Container Handling Figures At Turkish Ports

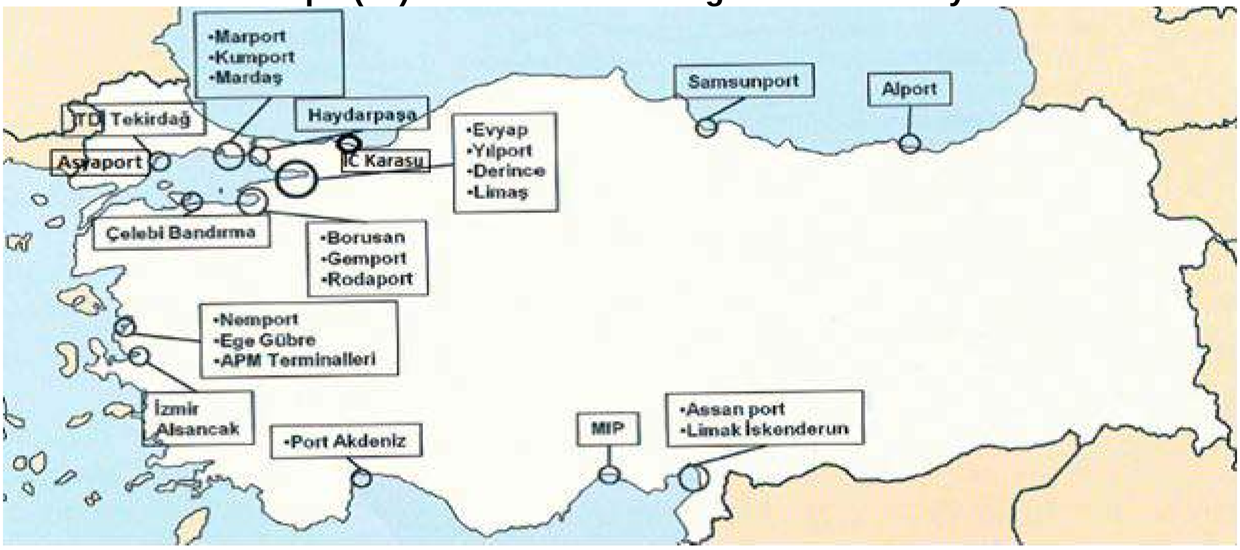
MODE OF TRANSPORT		2013	2014	2015	2016	2017
EXPORT	PCS	2.088.031	2.269.118	2.198.508	2.309.172	2.490.272
	TEU	3.165.653	3.487.949	3.394.508	3.543.804	3.866.874
	TONS	35.456.728	39.106.361	38.419.925	41.444.254	44.433.316
IMPORT	PCS	2.121.533	2.335.795	2.248.636	2.352.515	2.580.351
	TEU	3.199.969	3.581.809	3.454.345	3.607.086	3.975.205
	TONS	30.715.331	34.790.524	34.007.962	35.608.597	37.275.863
CABOTAGE	PCS	397.602	390.510	454.012	543.526	703.324
	TEU	544.496	526.798	606.064	738.312	935.521
	TONS	5.732.348	4.934.786	5.869.320	7.032.995	10.059.528
TRANSIT	PCS	651027	513.195	481.454	601.662	870.356
	TEU	989.815	754.216	691.481	872.772	1.232.937
	TONS	12.751.785	9.305.368	8.728.650	10.842.751	16.149.201
GRAND TOTAL	PCS	**5.258.193**	**5.508.618**	**5.382.610**	**5.806.875**	**6.644.303**
	TEU	**7.899.933**	**8.350.772**	**8.146.398**	**8.761.974**	**10.010.537**
	TONS	**84.656.192**	**88.137.039**	**87.025.857**	**94.928.597**	**107.917.908**

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

Graph (48): Container Handling Figures According To Years



Graph (49): Container Handling Ports in Turkey



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

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

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

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

Port/Facility	Load Type	Existing Capacity	Project End
Limak İskenderun	Container	1,000,000 TEU	3,000,000 TEU
Toros Tarım (Samsun)	Bulk Solid/General Cargo	3,300,000 Tons	8,500,000 Tons
Aksa	General Cargo	600,000 Tons	4,000,000 Tons
Petkim Container Terminal (Petlim)	Container	800.000 TEU	1,500,000 TEU *(might be increased to 4,000,000 TEU subject to cargo demand in the area in future)*

IC Ictas Sakarya Karasu Port

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

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

State Investments

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

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

Besides those projects;

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

TDI Ports and Privatizations

Table (49): The Ports Operated By Turkish Maritime Administrations (TDİ)							
	PIER			SHIP	STORAGE	CONTAINER	PASSANGER
PORTS	LENGTH	DEPTH	HANDLING	CAPACITY	CAPACITY	CAPACITY	CAPACITY
	(Meters)	(Meters)	(000x ton/year)	(number/years)	(000x ton/year)	(Teu/year)	(person/years)
SARAYBURNU Pier 1 and 2	242	(-8,-12)	-	-	-	-	-
KABATEPE	295	(-4,-5)	-	365	-		90.000
GÖKÇEADA (Port of Kuzu)	900	(-6,-7)	400	700	200		200.000
GÖKÇEADA (Uğurlu Pier)	76	(-6,-8)	-	365	-		-
TEKİRDAĞ	2.100	(-8,-12)	3.000	2.000	-	300.000	-
TAŞUCU	610	(-6, -9.6)	1.000	200 *(Except Ro-Ro)*	-		-
TOPLAM	**4.223**		**4.400**	**3.630**	**200**	**300.000**	**290.000**

Source: TDI

- In 1997, Ports of Tekirdağ *(operational rights transfered back to TDI on 13 March 2012)*, Rize, Ordu, Sinop, Giresun and Hopa
- In 1998, Port of Antalya
- In 2000, Ports of Marmaris and Alanya
- In 2003, Ports of Çeşme, Kuşadası, Trabzon and Dikili
- In 2014, Port of Salıpazarı

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

- In 2014, Port of Kemerköy
- In 2015, Port of İnebolu
- In 2016, Bodrum Gökçebel Marina

have been privatized,by the method of conveying the right of exploitation for 49 years.

TCDD Ports and Privatizations Ports Operated By TCDD

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

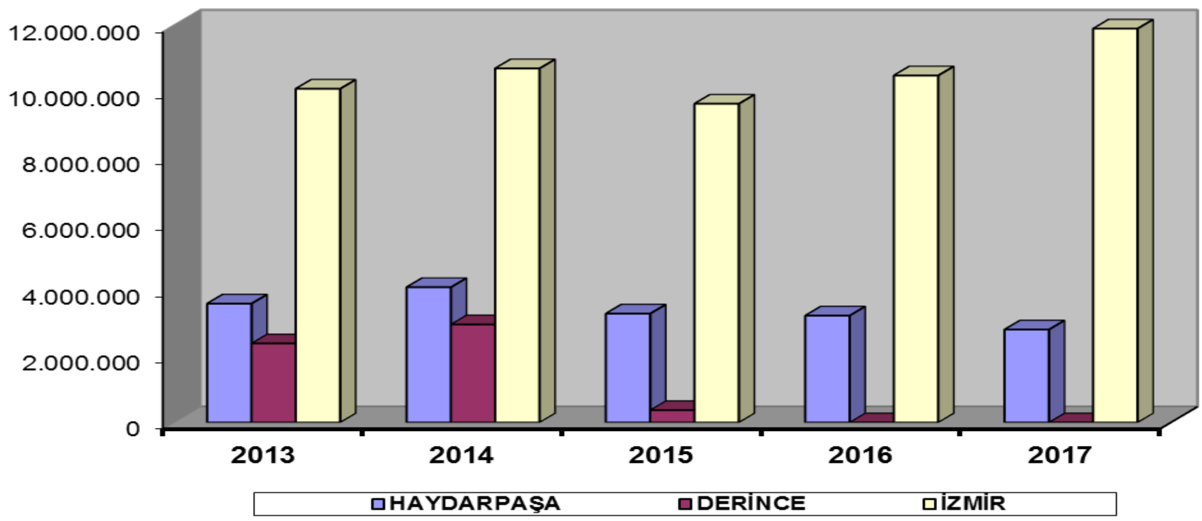
Source: TCDD

Table (50): TCDD Ports 2013-2017 Handling Figures Acc. To Cargo Groups

TCDD PORTS 2013 - 2017 Handling Figures Acc. To Cargo Groups						
PORT	YEAR	GENERAL CARGO	CONTAINER	DRY BULK	LIQUID BULK	TOTAL
HAYDARPAŞA	2013	1.909.774	951.634	733450	0	3.594.858
	2014	2.759.000	762.088	568900	0	4.089.988
	2015	2.630.004	661.552	0	0	3.291.556
	2016	2.678.024	553.116	0	0	3.231.140
	2017	2.383.960	427.334	0	0	2.811.294
DERİNCE	2013	1.372.533	10.655	936.987	69.812	2.389.987
	2014	1.473.008	19.525	1.347.509	123.894	2.963.936
	2015	219.011	1.788	149.273	2.977	373.049
	2016	0	0	0	0	0
	2017	0	0	0	0	0
İZMİR	2013	484.394	7.058.202	2.263.054	284.493	10.090.143
	2014	560.179	6.782.740	3.047.204	314.730	10.704.853
	2015	763.370	6.656.669	1.969.201	247.710	9.636.950
	2016	912.554	7.602.048	1.714.695	261.588	10.490.885
	2017	938.274	7.895.352	2.750.898	324.206	11.908.730
TOTAL	2013	3.766.701	8.020.491	3.933.491	354.305	16.074.988
	2014	4.792.187	7.564.353	4.963.613	438.624	17.758.777
	2015	3.612.385	7.320.009	2.118.474	250.687	13.301.555
	2016	3.590.578	8.155.164	1.714.695	261.588	13.722.025
	2017	3.322.234	8.322.686	2.750.898	324.206	14.720.024

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

Graph (50): TCDD Ports 2013 – 2017 Handling Figures



Graph (51): 2017 TCDD Ports Handling Acc. To Cargo Groups

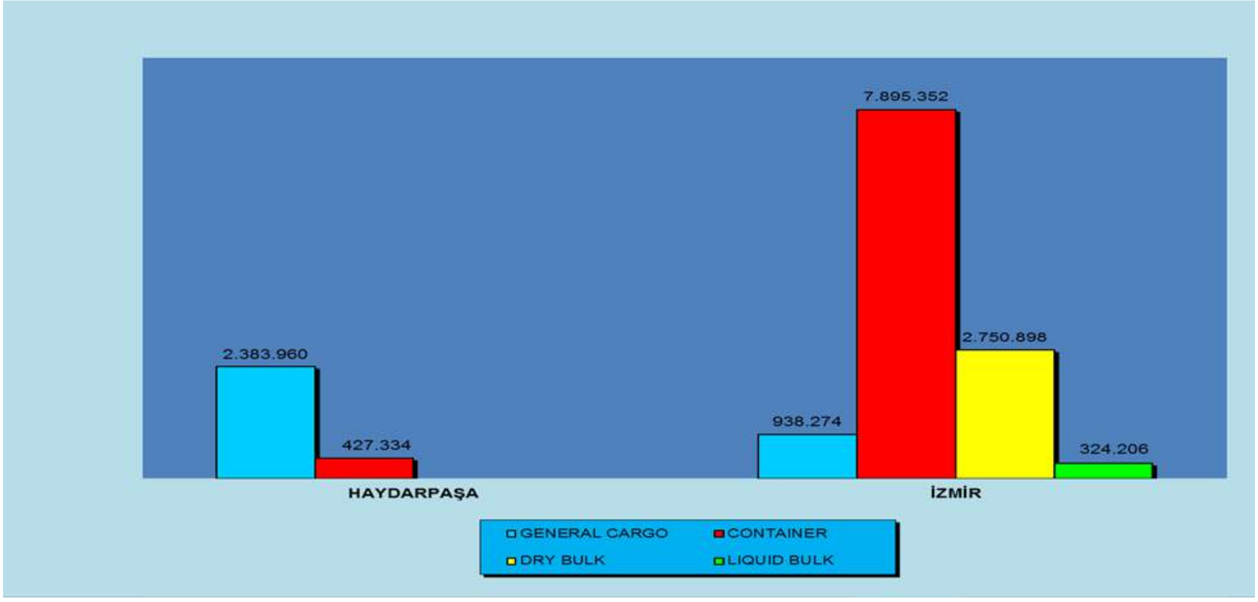
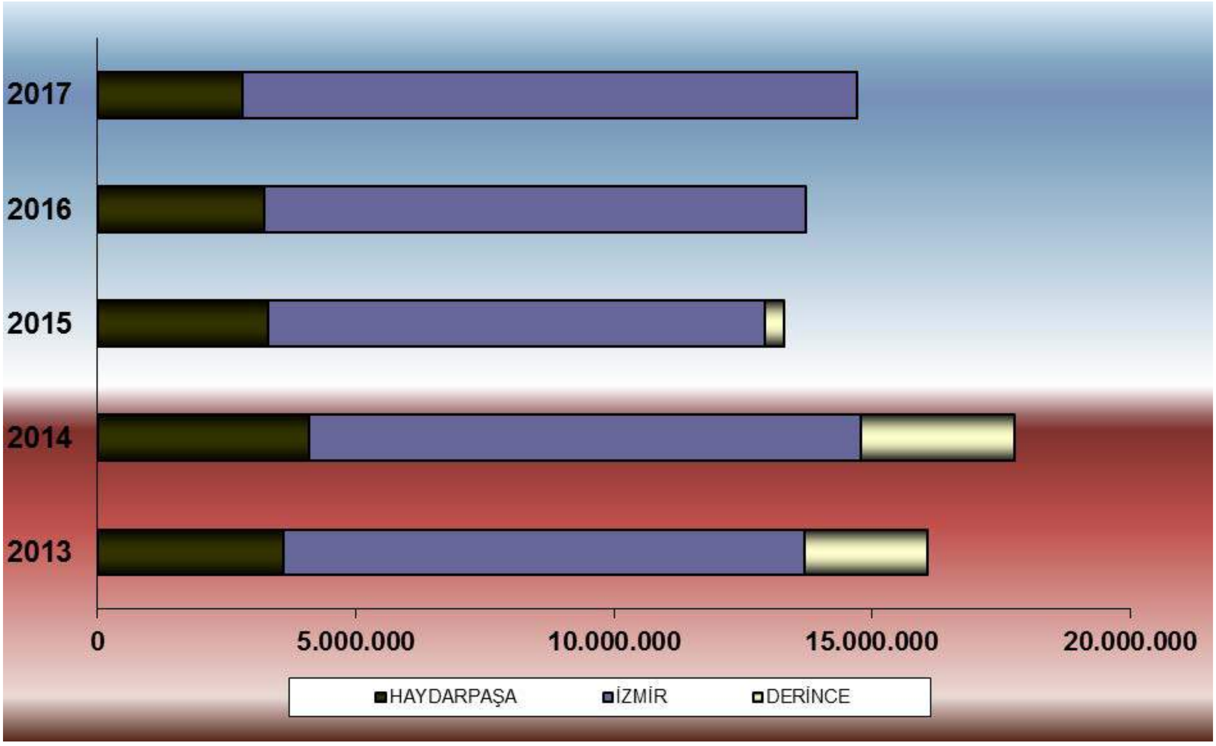


Table (51): TCDD Ports Loading And Unloading Figures

YEARS	LOADING			UNLOADING			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
HAYDARPAŞA							
2013	1.178.979	733.450	0	1.682.429	0	0	3.594.858
2014	1.559.846	568.900	0	1.961.242	0	0	4.089.988
2015	1.415.146	0	0	1.875.954	456	0	3.291.556
2016	**1.507.124**	**0**	**0**	**1.724.016**	**0**	**0**	3.231.140
2017	**1.301.059**	**0**	**0**	**1.510.235**	**0**	**0**	**2.811.294**
İZMİR							
2013	5.616.969	12.802	0	4.181.129	279.243	0	10.090.143
2014	5.713.213	23.731	0	4.686.457	281.452	0	10.704.853
2015	4.967.082	0	0	4.397.228	272.640	0	9.636.950
2016	**5.555.580**	**0**	**0**	**4.677.439**	**257.866**	**0**	10.490.885
2017	**6.020.876**	**31.553**	**0**	**5.480.171**	**376.130**	**0**	**11.908.730**
DERİNCE							
2013	1.422.032	12.618	1.265	844.844	109.218	10	2.389.987
2014	1.559.066	2.863	6.636	1.233.367	160.091	1.913	2.963.936
2015	243.045	130	0	123.329	6.545	0	373.049
2016	**0**	**0**	**0**	**0**	**0**	**0**	0
2017	**0**	**0**	**0**	**0**	**0**	**0**	**0**
TOTAL							
2013	8.217.980	758.870	1.265	6.708.402	388.461	10	16.074.988
2014	8.832.125	595.494	6.636	7.881.066	441.543	1.913	17.758.777
2015	6.625.273	130	0	6.396.511	279.641	0	13.301.555
2016	7.062.704	0	0	6.401.455	257.866	0	13.722.025
2017	**7.321.935**	**31.553**	**0**	**6.990.406**	**376.130**	**0**	**14.720.024**

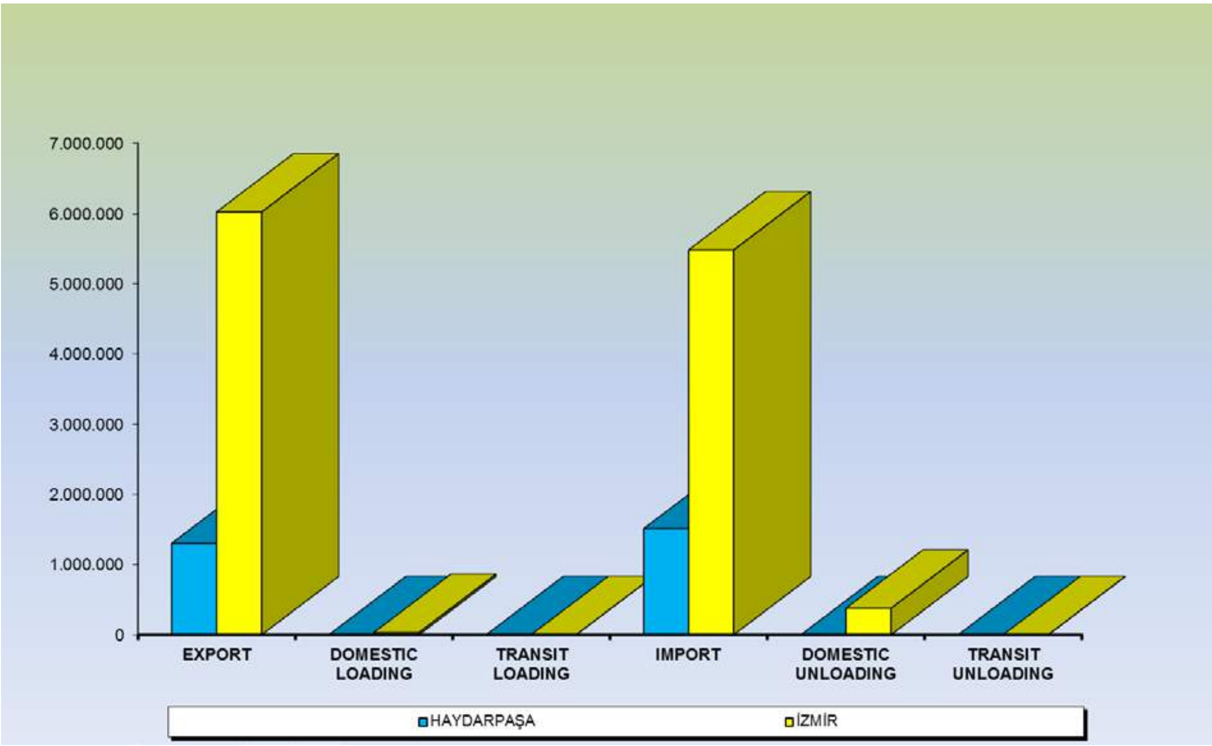
** Derince Port 2015 Tonnage is till end of February*

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



Source: TCDD

Graph (53): 2017 TCDD Ports Cargo Handling Acc. To Transportation Modes



Source: TCDD

Haydarpaşa Port

Haydarpaşa Port is in the province of İstanbul, which is one of the most important metropolitan cities. İstanbul is not only the most industrialized region but it has also the foremost cultural sightseeing and fascinating historical artifacts. İstanbul is knownto be as an open air museum in the world.
Haydarpaşa is in the meeting point and in the area covering the Black Sea Countries and the waterway of Rhein-Main-Danube Canal and it is gaining substantial importance in this aspect.
Haydarpaşa port has all modes of transport such as sea, rail and land road. It renders services 24 hours, the length of berths is 2,675 meters, the ships receipt capacity is 2,213 per year, and also container handling capacity is 360.000 TEU.

Port Capacities

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

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

İzmir Port

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

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

Port Capacities

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

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

Port Privatizations of Turkish Railways

Privatization Completed Ports

PORT NAME	DATE OF APPR.	DATE OF SIGN.	PRICE ($)
MERSİN	07.11.2005	11.05.2007	755 MILLION USD
BANDIRMA	19.09.2008	18.05.2010	175,5 MILLION USD
SAMSUN	19.09.2008	31.03.2010	125,2 MILLION USD
İSKENDERUN	07.01.2011	30.12.2011	372 MILLION USD
DERINCE	12.08.2014	25.02.2015	543 MILLION USD

Privatization Tender Cancelled Ports

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

Source: TCDD & Privatization Adm.

Privatized TCDD Ports

Mersin International Port (MIP)

Strategic Location

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

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

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

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

Access by railroad

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

Access by highway

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

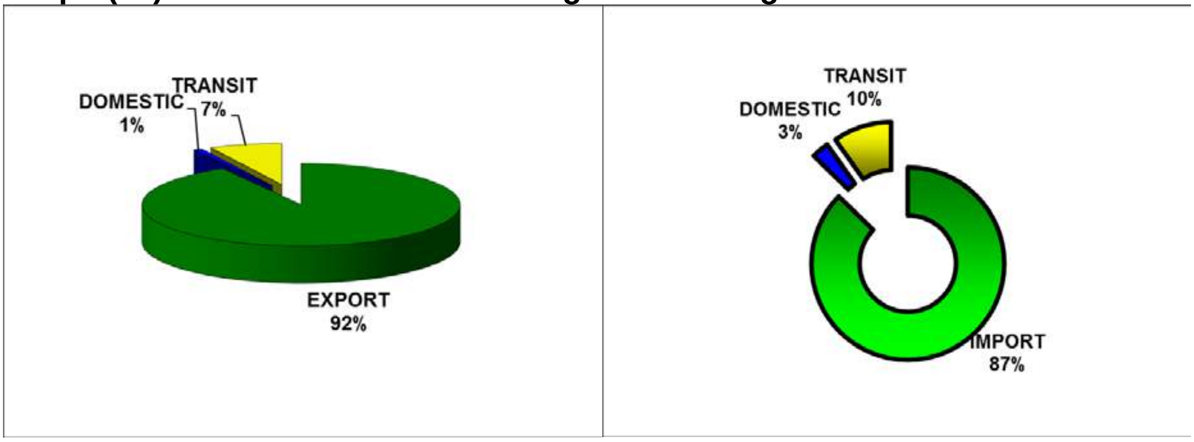
Free Port Zone

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

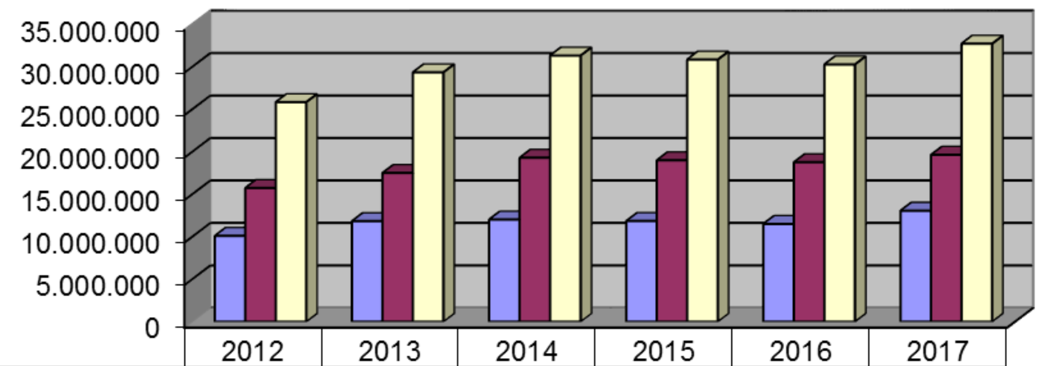
Table (52): Handling Figures – Port of Mersin (2017)

MERSIN INTERNATIONAL PORT							
TYPE OF CARGO	LOADING (Tonnes)			UNLOADING (Tonnes)			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
CEMENT	1.564.969	50.844		2.703	2.701		1.621.217
CEREALS	191.758		10.216	913.918	4.170	8.534	1.128.596
CHEMICALS	1.131.067	9.601	47.264	2.014.307	3.198	99.112	3.304.549
CITRUS	152.718		68	80.001		3.092	235.879
CNTR			293.340			419.307	712.647
CONST. MACHINERY	11.220	17	91	13.744		3.808	28.880
COTTON	61.763	2.472	7.875	204.768		8.218	285.096
FERTILIZERS	98.730	17.583	1.952	311.608	35.014	7.956	472.843
FOOD STUFF	1.742.623	901	38.145	882.882	290	98.191	2.763.032
FROZEN MEAT	6.446		5.051	30.621		60.420	102.538
FRUITS	173.365		10.397	260.893		485.394	930.049
GENERAL CARGO	3.046.351	1.901	281.180	3.517.905	22.807	378.252	7.248.396
GLASS	207.863		2.723	47.675		3.540	261.801
LEGUMES	256.203		2.856	916.434	19.759	6.238	1.201.490
LIVESTOCK	129		129	140.696		8.188	149.142
MACHINERY	117.731	15	2.001	122.477	71	6.069	248.364
MINERALS	1.748.046	23.041	209.071	582.901	2.800	184.586	2.750.445
PETR. PRODUCTS	190.690		1.298	4.884.179	481.812	30.176	5.588.155
RICE	89.977		2.518	361.579		29.104	483.178
SODIUM CARB.	682.036		124	175			682.335
SUGAR	2.908		6.663	93.734		435	103.740
TEXTILE	380.082	130	17.905	678.560	129	37.421	1.114.227
TIMBER	13.648	80	9.638	46.673		5.218	75.257
VEGETABLE OIL	102.826	326	1.538	826.200		9.141	940.031
VEHICLES	28.249		12.169	220.793		36.605	297.816
TOTAL	12.001.398	106.911	964.212	17.155.426	572.751	1.929.005	32.729.703

Graph (54): Mersin Port 2017 Loading & Unloading



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



	2012	2013	2014	2015	2016	2017
LOADING	10.106.1	11.845.8	12.025.4	11.859.0	11.513.4	13.072.5
UNLOADING	15.746.0	17.515.0	19.303.2	19.006.8	18.774.2	19.657.1
TOTAL HANDLING	25.852.1	29.360.8	31.328.6	30.865.9	30.287.6	32.729.7

Source: Mersin DTO, MIP

Samsunport (Samsun)

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

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

Main Port

Dock numbers 1-2-3-4-5 have a total length of 776 meters and a draft of 10,5 meters.
Dock number 6 has a length of 180 meters and drafts of 6,5 / 7 meters.
Dock numbers 7-8-9 have length of 400 meters and drafts of 6,5 / 7 meters.

Industry Dock

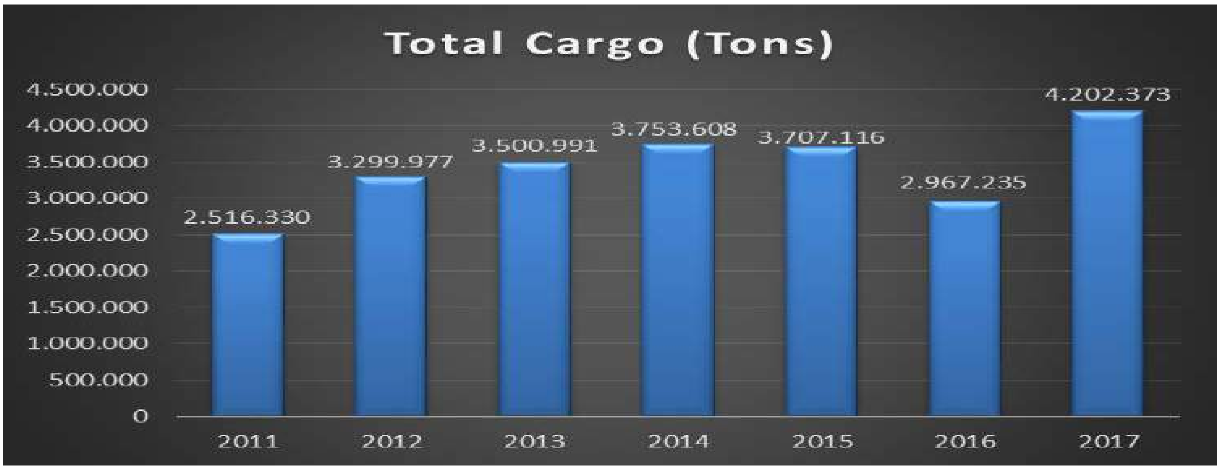
Dock numbers 10-11-12 have length of 400 meters and a draft of 12 meters.
Dock number 8 is Rail ferry Ramp, suitable for 1520 mm rail cars.
1334 vessels called Samsunport in 2017. Handling Figures of Samsunport according to the cargo groups are as below;

Table (53): Handling Figures of Samsunport Acc. To Years

Year	No. of Ships	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (Tons)	Ro-Ro (Tons)	Wagon Ferry (Tons)	Total (Tons)
2017	1334	2.092.909	42.824	784.884	721.580	530.384	29.792	4.202.373
2016	986	1.459.473	38.936	569.239	627.007	266.376	6.206	2.967.235
2015	1484	1.543.466	56.470	802.569	658.451	629.874	16.287	3.707.116
2014	1423	1.665.403	48.559	794.776	589.552	617.128	38.190	3.753.608
2013	1250	1.657.680	61.558	761.662	486.623	491.547	41.921	3.500.991
2012	1391	1.543.651	55.742	716.700	393.184	528.682	62.018	3.299.977
2011	1183	1.064.298	14.848	805.635	82.212	527.013	22.324	2.516.330

Source: Samsunport

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



Çelebi Bandırma Port

Port Features

Coordinates	40 º 21’ 45’’ N - 027º 57’ 50’’ E
Types of Cargo	Bulk, General, Liquid, Ro-Ro, Container
Area Capacity	
Total Port Area	268.348 m²
Total Storage Area	215.569 m²
Customs Area	268.348 m²
Equipment Parking Area	1.500 m²
CFS	8.000 m²
Total Dock Length	2.973 m
Cargo Capacity	
Containers (Teu/Year)	350.000
Bulk (Tons/Year)	12.000.000
General (Tons/Year)	1.000.000
Liquid Bulk (Tons/Year)	1.000.000
Storage Capacity	
Containers (TEU)	4.195
Bulk / Open Area (Tons)	165.000
Bulk / Closed Area (Tons)	35.000
General (Tons)	110.000
Vessel Acceptance Capacity	
Container (Vessel/Year)	330
Dry Bulk (Vessel/Year)	3.240
Liquid Bulk (Vessel/Year)	216
General Cargo (Vessel/Year)	216
Ro-Ro (Vessel/Year)	13.140

The port has connections to Istanbul, Turkey's business and industrial center, to the Southern Marmara and Aegean Region and has a strategic location at the south coast of Marmara. It offers bulk load, ro-ro and mixed load handling services. Çelebi, thanks to the railway and highway connections and wide warehouses of Port of Bandırma, is considered that the port can provide the greatest benefit to the Southern Marmara, Central Anatolia and the Aegean Sea Regions.

At the port's 20 docks with a total length of 2,973 meters and with depths ranging from 6 to 11.5 meters, the facility handles bulk cargo, breakbulk cargo, containers, liquid cargo and Ro-Ro vessels. Loading and unloading services are carried out by high-technology mobile cranes, excavators and conveyor system.
The port has two breakwaters, one with a length of 1,000 meters and the other 500 meters, with a clearing of 225 meters between.

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

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

Year	General Cargo (Tons)	Dry Bulk (Tons)	Liquid Bulk (Tons)	Container (TEU)	Ro-Ro (Pcs)	Passenger (Pcs)
2017	588.084	3.607.944	486.521	28.838	244.584	1.014.897
2016	407.894	3.210.578	394.026	11.471	215.090	951.788
2015	449.275	3.035.469	324.024	18.613	205.890	1.052.971
2014	406.026	3.906.540	257.143	25.163	220.534	1.028.496
2013	330.778	3.521.039	217.981	23.628	213.201	966.739
2012	367.221	3.485.486	225.189	9.748	205.462	821.008
2011	345.082	3.214.328	190.912	2.072	198.366	967.115

Source: Çelebi Bandırma Port

Limakport İskenderun

Coordinates	36° 36' N, 36° 11' E
Port Area	1.000.000 (m2)
Number of Berths	8
Berthing Place Lengths	1.652 (m)
General Cargo Berths Length	732 (m)
Container Berths Length	920
Berthing Place Water Depths	Maks. 10-15.5 (m)
Container Berth Water Depth	15,5 (m)
Reefer Plugs	600
Container Capacity	1.000.000 TEU/Year
Dry Bulk Capacity	2.500.000 Ton/Year
General Cargo Capacity	600.000 Ton/Year
Ro-Ro Capacity	120.000 Vehicle/Year
Ro-Pax Capacity	30.000 Truck/Year

LimakPort İskenderun is located on the Northeast of the Mediterranean Sea. It renders services for transit traffic to the Middle East countries as well as East and Southeast Anatolian territories. In this regard it occupies an important place as a transit port. The Port has become a very important and advantageous location for all manufacturers, traders and exporters of a wide hinterland extending from Mersin to Şırnak and from Malatya to Kilis. Furthermore, the Port plays a big role in transit trade for Middle East, particularly Northern Iraq.

The Port has a breakwater of 1375 m long. The depth at the port entrance is 12 m. The port is also connected with state railway and highway network. As a multi-purpose port, serves different type of commodities and cargo groups such as general cargo, dry/liquid bulk, container handling, and Ro-Ro vessels.

Table (55): Handling Figures of Limakport İskenderun

Bulk Cargo / General Cargo / Container

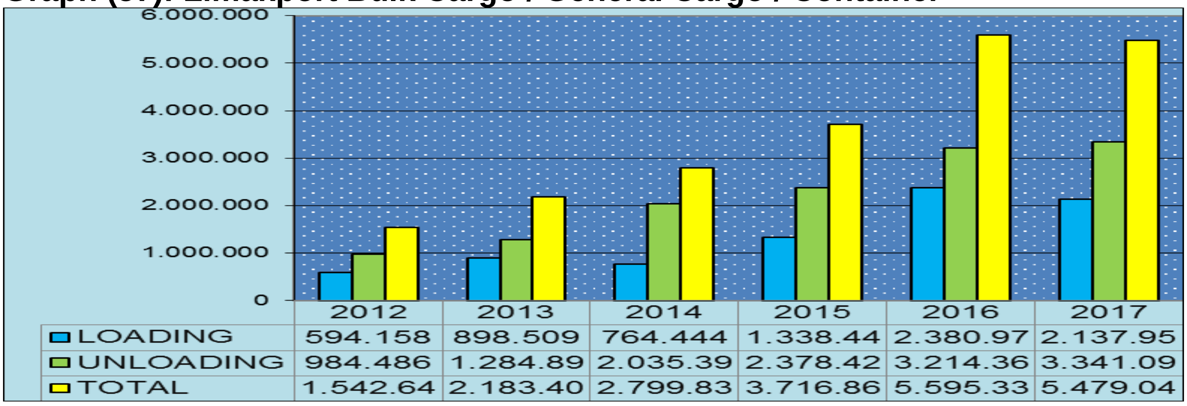
Year	Loading (Tons)	Unloading (Tons)	Total (Tons)
2012	594.158	984.486	**1.542.642**
2013	898.509	1.284.899	**2.183.408**
2014	764.444	2.035.390	**2.799.834**
2015	1.338.443	2.378.422	**3.716.865**
2016	2.380.977	3.214.362	**5.595.339**
2017	2.137.952	3.341.090	**5.479.042**

Ro-Ro / Ro-Pax

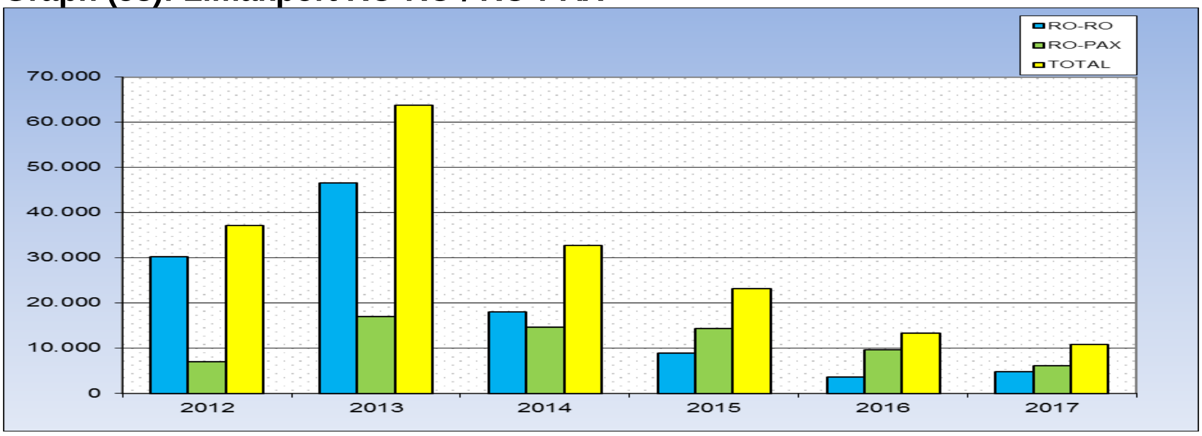
Year	Ro-Ro	Ro-Pax	Total
2012	30.208	6.982	**37.190**
2013	46.602	17.087	**63.689**
2014	18.066	14.736	**32.802**
2015	8.888	14.355	**23.243**
2016	3.648	9.635	**13.283**
2017	4.784	6.127	**10.911**

Source: Limakport İskenderun

Graph (57): Limakport Bulk Cargo / General Cargo / Container



Graph (58): Limakport RO-RO / RO-PAX



Safi Derince International Port

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

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

Berths	Length(m)	Depth(m)
1-2	90	14
3-4	440	15
5-6	550	12
7	160	10
8	120	5,5

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

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

Table (56): Handling Figures of Safi Derince International Port Acc. To Years And Cargo Groups

Year	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (TEU)	Ro-Ro (Pcs)
2015	1.675.290	18.533	510.241	1.983	450.860
2016	1.876.300	16.865	626.400	6.750	422.350
2017	1.930.000	0	340.686	1.495	397.391

Private Ports List and Geographical Distribution of Main Ports In Turkey

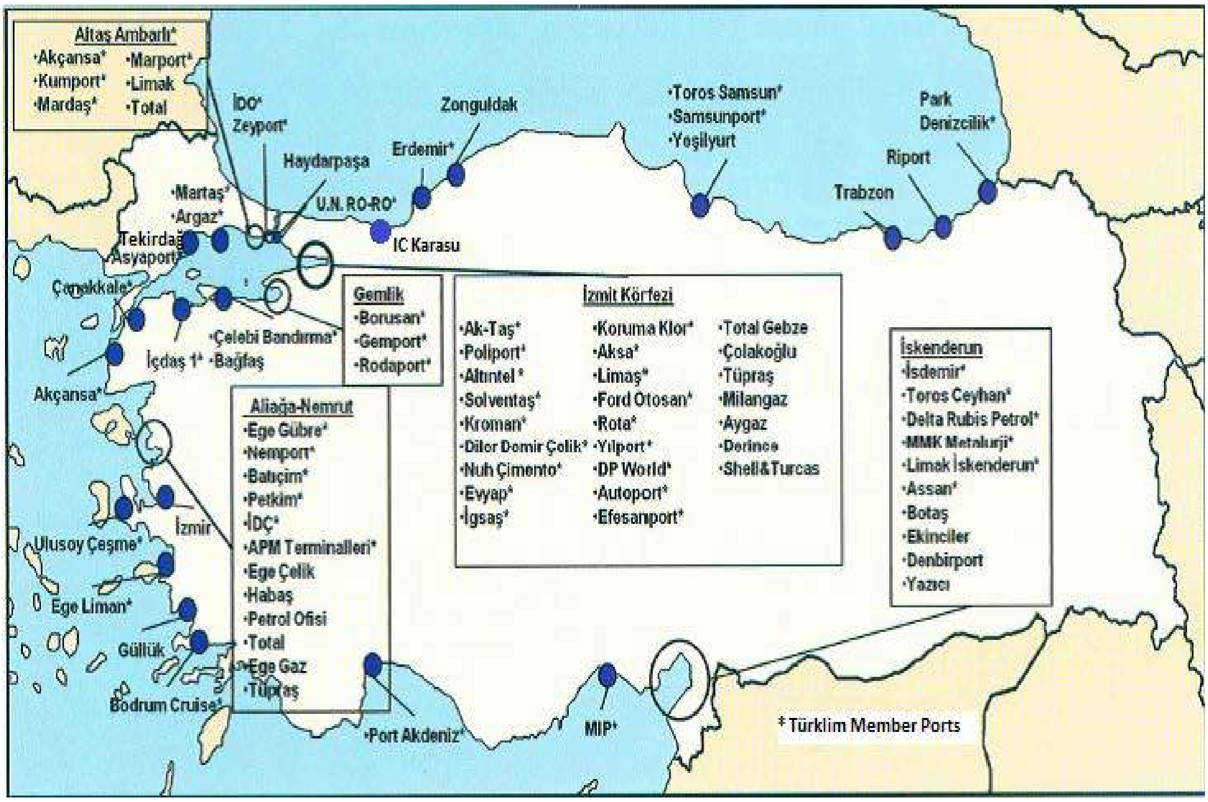
Table (57): Private Ports List

1) ALİDAŞ ALANYA LİMANI
2) ANTALYA LİMANI SERBEST BÖLGE RIHTIMI
3) ÇEKİSAN ŞAMANDIRASI
4) MOİL ŞAMANDIRA PLATFORMU
5) ORTADOĞU ANTALYA LİMAN İŞLETMELERİ A.Ş. (PORT AKDENİZ)
6) POAŞ ANTALYA ŞAMANDIRA TERMİNALİ
7) AKÇANSA ÇANAKKALE LİMANI
8) BAGFAŞ İSKELESİ
9) ÇELEBİ BANDIRMA LİMANI
10) BORUSAN LİMANI
11) BP GEMLİK TERMİNALİ
12) GEMLİK GÜBRE LİMANI
13) GEMPORT
14) RODA LİMANI
15) İÇDAŞ İSKELESİ
16) DOLAMİT MADENCİLİK RIHTIMI
17) ÖZGÜMÜŞ MADENCİLİK RIHTIMI
18) ASYAPORT
19) AUTOPORT LİMAN İŞLETMELERİ A.Ş.
20) AKÇANSA AMBARLI LİMANI
21) AMBARLI DEPOLAMA TESİSLERİ
22) ANADOLU ÇİMENTO TESİSLERİ
23) LİMAK AMBARLI TERMİNALİ
24) AYGAZ LPG DEPOLAMA VE DOLUM TESİSLERİ
25) ÇEKİSAN ÇEKMECE DEPOLAMA
26) KUMPORT LİMANI
27) MARDAŞ
28) MARPORT
29) PETROL OFİSİ HARAMİDERE TESİSLERİ
30) TOTAL HARAMİDERE İSKELESİ
31) ANADOLU YAKASI KUMCULARI İSKELELERİ
32) MOBIL OIL SERVİBURNU İSKELESİ
33) PETROL OFİSİ ÇUBUKLU TESİSLERİ
34) ZEYPORT
35) AKÇANSA YALOVA ÇİMENTO TERMİNALİ İSKELESİ
36) AKSA AKRİLİK KİMYA SANAYİ A.Ş.
37) AKTAŞ TERMİNALİ
38) ALEMDAR DİLİSKELESİ
39) ALTINTEL İSKELESİ
40) AYGAZ YARIMCA DOLUM TESİSİ
41) ARGAZ LPG AKARYAKIT DOLUM VE DEPOLAMA TESİSİ
42) ÇOLAKOĞLU METALURJİ TESİSLERİ
43) DİLER LİMAN TESİSLERİ
44) EVYAP DENİZ İŞLETMECİLİĞİ LOJİSTİK VE İNŞAAT A.Ş.

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

108) GÜBRETAŞ SARISEKİ İSKELESİ
109) İSDEMİR LİMANI
110) DELTA PETROL LİMANI
111) ORHAN EKİNCİ İSKELESİ
112) YAZICI İSKELESİ
113) ATAŞ TERMİNALİ
114) MERSİN LİMANI
115) MMK ATAKAŞ DÖRTYOL LİMAN İŞLETMESİ
116) MESBAŞ RIHTIMI
117) SAVKA PLATFORMU
118) SANKO LİMAN TESİSİ
119) ENERJİ MERSİN TERMİNALİ
120) IC KARASU LİMANI
121) SAMSUNPORT
122) TOROS TARIM SANAYİİ SAMSUN LİMAN İŞLETMESİ
123) SÜRSAN ŞAMANDIRASI
124) ORDU LİMANI
125) AYGAZ ŞAMANDIRALARI
126) PETROL OFİSİ ŞAMANDIRALARI
127) TOTAL OIL ŞAMANDIRASI
128) YILDIZ ENTEGRE AĞAÇ SAN. ŞAMANDIRASI
129) SİNOP LİMANI
130) YEŞİLYURT LİMANI
131) GİRESUN LİMANI
132) PARK DENİZCİLİK HOPA LİMAN İŞLETMELERİ A.Ş.
133) RİPORT
134) ÜNYE ÇİMENTO TESİSİ LİMANI
135) POAŞ ŞAMANDIRA TESİSLERİ
136) TRABZON LİMANI

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

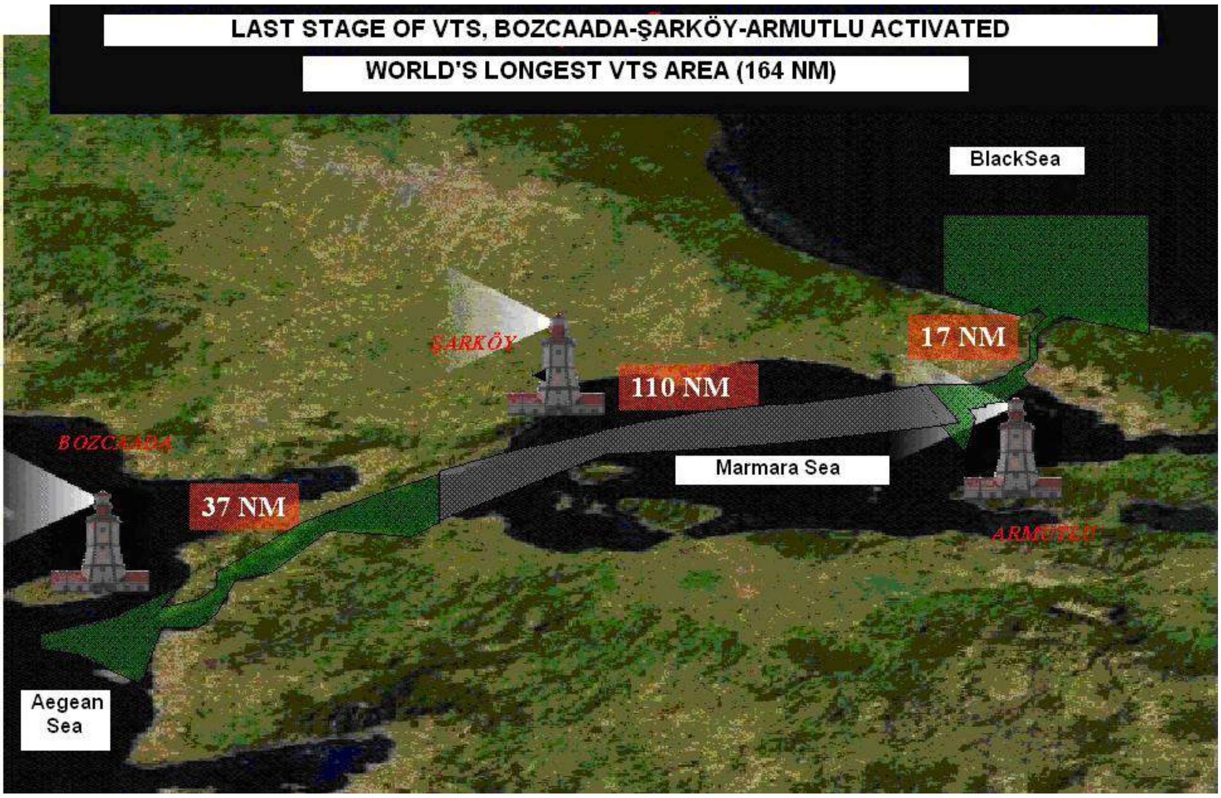


Source: TURKLIM

TURKISH STRAITS

2017

CHAPTER V



THE TURKISH STRAITS AND MARITIME TRAFFIC SYSTEMS

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

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

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

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

The number of vessels that passed through the Turkish Straits between the years 2006-2017 are shown in Table below.

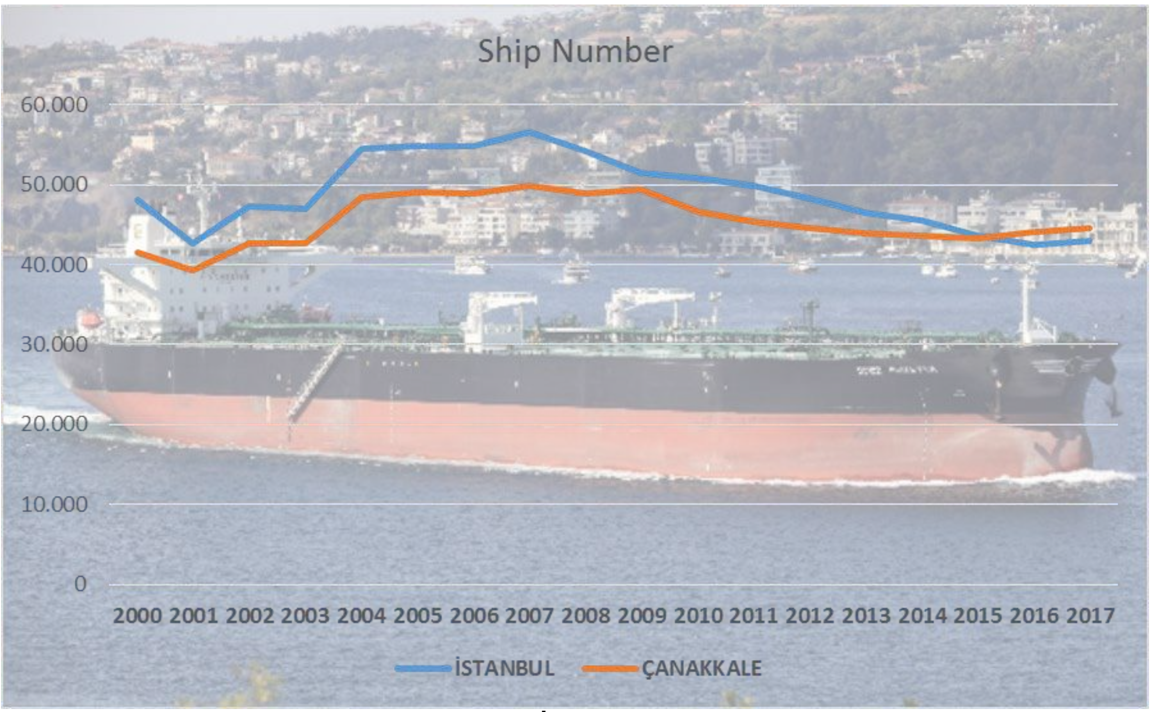
Table (58): Ships Passing Through the Turkish Straits (2006-2017)

YEARS	ISTANBUL	ÇANAKKALE
2006	54.880	48.915
2007	56.606	49.913
2008	54.239	48.978
2009	51.422	49.453
2010	50.871	46.686
2011	49.798	45.379
2012	48.328	44.613
2013	46.532	43.889
2014	45.529	43.582
2015	43.544	43.230
2016	42.553	44.035
2017	42.978	44.615

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

In the year 2017, 42.978 ships in total have passed through the Istanbul Strait with a monthly average of 3.500 ships; 44.615 ships in total have passed through the Çanakkale Strait with a monthly average of 3.700 ships.

Graph (60): Ships Passing Through the Turkish Straits(2000-2017)



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

Table (59): The Statistics Summary Of Vessels Passed Istanbul Strait

Months	Number of Vessel	Total Gross Tonnage	With Pilot	Sp 1 Given	Non Call In Vessel	LOA Longer Than 200M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/ LNG	TCH	
January	3.417	46.327.093	1.873	3.384	2.123	330	40	555	61	145	4
February	2.919	40.481.720	1.575	2.896	1.781	269	35	474	64	132	7
March	3.744	51.966.688	2.099	3.714	2.339	353	41	611	72	159	10
April	3.511	47.763.199	1.917	3.487	2.053	324	39	484	78	169	4
May	3.778	51.638.407	2.058	3.751	2.305	330	31	523	70	184	7
June	3.521	48.292.804	1.944	3.507	2.056	329	29	510	55	170	6
July	3.455	48.897.723	1.995	3.430	2.070	327	35	492	64	158	10
August	3.712	54.168.194	2.219	3.697	2.280	392	58	488	58	147	4
September	3.378	51.024.012	1.970	3.356	2.117	352	24	456	49	129	7
October	3.861	52.987.789	2.117	3.839	2.351	346	40	510	49	170	11
November	3.809	53.165.444	2.093	3.784	2.334	337	40	546	51	161	11
December	3.873	52.611.675	2.199	3.855	2.302	316	24	563	71	154	7
Total	**42.978**	**599.324.748**	**24.059**	**42.700**	**26.111**	**4.005**	**436**	**6.212**	**742**	**1.878**	**88**

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

Table (60): The Statistics Summary Of Vessels Passed Canakkale Strait

Months	Number of Vessel	Total Gross Tonnage	With Pilot	Sp 1 Given	Non Call In Vessel	LOA Longer Than 200M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/ LNG	TCH	
January	3.470	63.062.743	1.483	3.133	2.115	483	51	532	74	222	10
February	3.069	57.829.793	1.423	3.042	1.762	423	39	466	70	190	18
March	3.861	69.585.636	1.725	3.829	2.340	515	49	600	67	189	12
April	3.650	66.704.052	1.595	3.617	2.111	500	57	514	76	220	14
May	3.909	71.181.105	1.719	3.867	2.266	519	74	524	76	245	4
June	3.637	66.342.862	1.618	3.607	2.029	515	79	511	49	233	18
July	3.714	70.567.480	1.701	3.669	2.120	545	65	513	51	243	11
August	3.854	73.192.622	1.720	3.832	2.258	579	55	478	52	209	9
September	3.620	68.651.072	1.619	3.574	2.147	530	64	428	41	192	6
October	4.035	73.417.243	1.847	3.990	2.319	552	86	507	46	220	16
November	3.891	70.744.284	1.716	3.848	2.321	521	89	540	52	199	16
December	3.905	72.181.744	1.759	3.880	2.299	515	47	532	80	237	15
Total	**44.615**	**823.460.636**	**19.925**	**43.888**	**26.087**	**6.197**	**755**	**6.145**	**734**	**2.599**	**149**

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

Table (61): The Monthly Statistics of Vessels Passed Istanbul Strait According to Their Length and Pilot Request

Months	Longer Than 300 M		Between 250-300 M		Between 200-250 M		Between 150-200 M		Between 100-150 M		Shorter Than 100 M		Total	
	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	Total With Pilot
January	0	0	87	87	243	243	834	722	1.337	562	917	259	**3.418**	**1.873**
February	0	0	88	88	181	181	779	667	1.038	405	833	234	**2.919**	**1.575**
March	0	0	118	118	235	234	941	852	1.418	588	1.032	307	**3.744**	**2.099**
April	0	0	130	130	194	194	820	721	1.369	632	998	240	**3.511**	**1.917**
May	2	2	117	117	211	211	926	809	1.504	658	1.018	261	**3.778**	**2.058**
June	0	0	111	111	218	218	818	697	1.394	618	980	300	**3.521**	**1.944**
July	1	1	106	106	220	220	904	782	1.293	584	931	302	**3.455**	**1.995**
August	2	2	114	114	276	276	954	905	1.325	601	1.041	321	**3.712**	**2.219**
September	0	0	106	106	246	246	933	787	1.251	583	842	248	**3.378**	**1.970**
October	0	0	116	116	230	230	963	821	1.386	615	1.166	335	**3.861**	**2.117**
November	0	0	124	123	213	213	1.026	870	1.390	590	1.056	297	**3.809**	**2.093**
December	0	0	101	101	215	215	1.067	932	1.396	617	1.093	334	**3.872**	**2.199**
Total	**5**	**5**	**1.318**	**1.317**	**2.682**	**2.681**	**10.965**	**9.565**	**16.101**	**7.053**	**11.907**	**3.438**	**42.978**	**24.059**

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

Table (62): The Monthly Statistics of Vessels Passed Canakkale Strait According to Their Length and Pilot Request

Months	Longer Than 300 M		Between 250-300 M		Between 200-250 M		Between 150-200 M		Between 100-150 M		Shorter Than 100 M		Total	
	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	With Pilot	Total Vessel	Total With Pilot
January	11	11	159	157	313	254	1.106	604	1.122	279	759	178	**3.470**	**1.483**
February	9	9	144	141	270	220	1.053	592	930	304	663	157	**3.069**	**1.423**
March	8	8	178	172	329	261	1.252	737	1.261	362	833	185	**3.861**	**1.725**
April	10	10	182	172	308	229	1.142	642	1.186	354	822	188	**3.650**	**1.595**
May	21	21	178	177	320	267	1.246	728	1.248	354	896	172	**3.909**	**1.719**
June	21	21	171	162	323	249	1.083	655	1.142	316	897	215	**3.637**	**1.618**
July	22	22	175	170	348	270	1.199	709	1.139	350	831	180	**3.714**	**1.701**
August	19	19	186	178	374	284	1.251	740	1.112	318	912	181	**3.854**	**1.720**
September	23	23	171	166	336	262	1.196	703	1.076	304	818	161	**3.620**	**1.619**
October	21	21	191	188	340	267	1.284	780	1.200	366	999	225	**4.035**	**1.847**
November	16	16	177	174	328	241	1.299	791	1.183	315	888	179	**3.891**	**1.716**
December	22	22	184	181	309	225	1.329	771	1.193	335	868	225	**3.905**	**1.759**
Total	**203**	**203**	**2.096**	**2.038**	**3.898**	**3.029**	**14.440**	**8.452**	**13.792**	**3.957**	**10.186**	**2.246**	**44.615**	**19.925**

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

Table (63): The Monthly Statistics of Vessels Passed Istanbul Strait According to Their Ship Type

Months	*January*	February	March	April	May	June	July	August	September	October	November	December	**Total**
Barge / Barge Carrier				5	1	4	1	3	3	1			**18**
Bulk Carrier	636	528	702	615	655	559	674	825	764	750	762	736	**8.206**
Cement Carrier			1	1	1					2		1	**6**
Container Ship	230	197	217	202	226	242	206	203	214	220	253	249	**2.659**
Ferry											1		**1**
General Cargo Ship	1.660	1.397	1.817	1.783	1.908	1.782	1.662	1.790	1.595	1.976	1.859	1.934	**21.163**
Livestock Carrier	30	33	32	49	69	71	56	68	36	30	27	43	**544**
Naval	26	17	28	21	21	10	21	15	21	19	24	14	**237**
Passenger Ship	19	18	19	19	20	36	36	38	33	38	32	28	**336**
Refrigerated Cargo Carrier		3	5	1	9	12	3	1	4	2	6		**46**
Roll on Roll of Vessel	21	29	33	36	39	28	38	35	32	37	32	36	**396**
Other Tanker, TTA	555	474	611	484	523	510	492	488	456	510	546	563	**6.212**
Chemical Tanker, TCH	145	132	159	169	184	170	158	147	129	170	161	154	**1.878**
Liquefied Petroleum Gas/Natural Gas Tanker, LPG/LNG	61	64	72	78	70	55	64	58	49	49	51	71	**742**
Tug	15	18	26	14	19	22	26	20	18	34	29	21	**262**
Vehicle Carrier	3	3	3	7	5	8	4	2	1	3	3	3	**45**
Other	16	6	19	27	28	12	14	19	23	20	23	20	**227**
Total	**3.417**	**2.919**	**3.744**	**3.511**	**3.778**	**3.521**	**3.455**	**3.712**	**3.378**	**3.861**	**3.809**	**3.873**	**42.978**

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

Table (64): The Monthly Statistics of Vessels Passed Canakkale Strait According to Their Ship Type

Months	*January*	February	March	April	May	June	July	August	September	October	November	December	**Total**
Barge / Barge Carrier	1	3	3	10	9		1	7	11	23	18	3	**89**
Bulk Carrier	650	564	748	635	697	589	710	867	781	787	788	769	**8.585**
Cement Carrier					1				1	2		2	**6**
Container Ship	367	334	416	408	439	414	422	394	410	437	453	463	**4.957**
Ferry	4		1	5	3			5	2	2	1	1	**24**
General Cargo Ship	1.265	1.101	1.439	1.354	1.448	1.383	1.328	1.425	1.351	1.581	1.409	1.401	**16.485**
Livestock Carrier	34	35	36	48	73	75	65	81	46	39	40	55	**627**
Naval	29	20	27	22	20	10	27	14	24	23	37	18	**271**
Passenger Ship		5	4	5	2	13	9	3	4	2	1	1	**49**
Refrigerated Cargo Carrier	5	9	12	10	19	15	7	6	6	5	11	8	**113**
Roll on Roll of Vessel	200	189	221	226	220	197	204	195	199	220	203	205	**2.479**
Other Tanker, TTA	532	466	600	514	524	511	513	478	428	507	540	532	**6.145**
Chemical Tanker, TCH	222	190	189	220	245	233	243	209	192	220	199	237	**2.599**
Liquefied Natural Gas Tanker, LNG	15	13	10	4	6	4	4	8	4		2	12	**82**
Liquefied Petroleum Gas Tanker, LPG	59	57	57	72	70	45	47	44	37	46	50	68	**652**
Tug	27	27	30	31	19	42	33	22	25	32	34	43	**365**
Vehicle Carrier	29	40	40	40	53	50	56	52	44	58	60	54	**576**
Other	31	16	28	46	61	56	45	44	55	51	45	33	**511**
Total	**3.470**	**3.069**	**3.861**	**3.650**	**3.909**	**3.637**	**3.714**	**3.854**	**3.620**	**4.035**	**3.891**	**3.905**	**44.615**

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

Table (65): The Statistics Summary Of Vessels Passed Istanbul Strait

Months	Number of Vessel	Total Gross Tonnage	With Pilot	Sp 1 Given	Non Call In Vessel	LOA Longer Than 200M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/ LNG	TCH	
2006	54.880	475.796.880	26.589	53.324	31.880	3.653	2.176	7.659	814	1.680	111
2007	56.606	484.867.696	26.685	55.132	31.826	3.653	2.138	7.204	800	2.050	105
2008	54.396	515.639.614	27.001	53.232	31.762	3.911	1.800	6.564	764	1.975	119
2009	51.422	514.656.446	24.977	50.712	32.297	3.871	1.128	6.557	866	1.876	122
2010	50.871	505.615.881	26.035	50.020	28.668	3.623	1.377	6.464	1.099	1.711	115
2011	49.798	523.543.509	26.011	49.179	27.938	3.800	1.046	6.216	1.227	1.660	93
2012	48.329	550.526.579	24.812	47.638	27.345	3.866	1.064	5.913	1.336	1.779	98
2013	46.532	551.771.780	24.023	45.616	26.577	3.801	1.192	5.685	1.741	1.580	87
2014	45.529	582.468.334	24.508	44.928	26.212	4.295	928	5.587	1.540	1.618	90
2015	43.544	565.216.784	23.349	43.039	25.243	3.930	879	5.825	1.232	1.576	71
2016	42.553	565.282.287	22.356	42.132	26.050	3.873	522	6.033	989	1.681	73
2017	42.978	599.324.748	24.059	42.700	26.111	4.005	436	6.212	742	1.878	88

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

Graph (61): The Statistics Summary Of Vessels Passed Istanbul Strait Number Of Vessel and Gross Tonnage

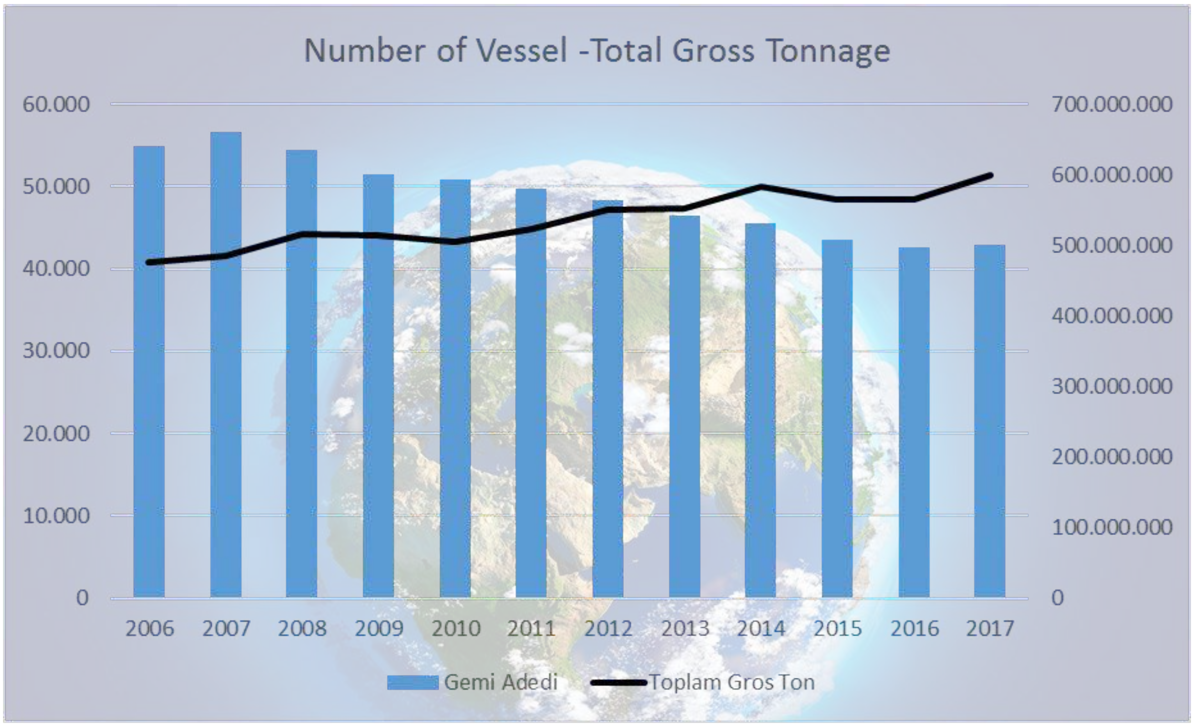
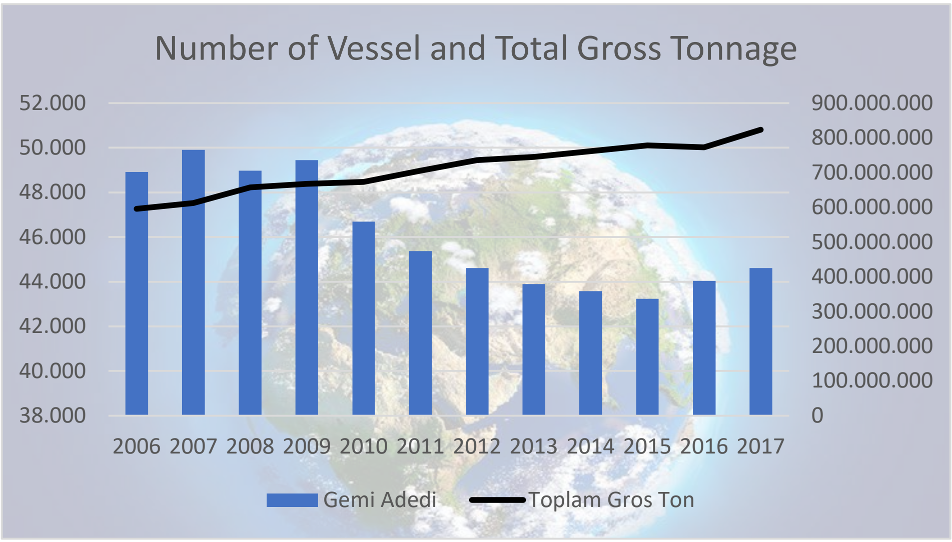


Table (66): The Statistics Summary Of Vessels Passed Canakkale Strait

Months	Number of Vessel	Total Gross Tonnage	With Pilot	Sp 1 Given	Non Call In Vessel	LOA Longer Than 200M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/ LNG	TCH	
2006	48.915	595.826.240	16.871	48.264	32.061	4.845	1.404	7.204	798	1.565	131
2007	49.913	611.885.819	16.885	48.802	31.981	4.945	1.873	6.527	754	1.990	138
2008	48.978	657.396.892	18.334	48.565	31.981	5.223	844	5.990	777	1.991	162
2009	49.453	667.412.661	18.588	49.210	32.559	5.176	615	6.293	842	2.432	146
2010	46.686	672.843.533	18.678	46.469	28.768	5.098	598	6.017	902	2.333	138
2011	45.379	705.412.518	18.920	45.196	27.983	5.494	572	5.661	974	2.183	159
2012	44.613	735.728.537	18.775	44.416	27.418	5.919	519	5.656	1.038	2.304	134
2013	43.889	745.567.671	18.924	43.579	26.534	5.824	448	5.822	1.380	2.097	123
2014	43.582	761.631.756	19.107	43.238	26.257	5.902	512	5.875	1.206	2.169	116
2015	43.230	777.989.382	18.843	42.755	25.220	5.842	581	6.009	1.036	2.479	122
2016	44.035	772.922.682	19.007	43.543	26.071	5.665	661	6.041	881	2.559	139
2017	44.615	823.460.636	19.925	43.888	26.087	6.197	755	6.145	734	2.599	149

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

Table (67): The Statistics Summary Of Vessels Passed Canakkale Strait Number Of Vessel and Gross Tonnage



Turkish Straits Vessel Traffic Services

Turkish Straits VTS, comprised of the Straits of Istanbul and Çanakkale and the Sea of Marmara, has been established in order to enhance maritime safety, minimize the risks of the possible threats and protect the marine environment in line with national legislation and the international regulations, by using the latest technology on 30th December 2003 and now it serves the safe navigation to 44000 vessels yearly.

Upgrade of Turkish Straits Vessel Traffic Services System

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

Vessel Traffic Management and Information System (VTMIS) Project

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

Regional VTS Systems; it is aimed to increase the sea traffic safety and efficiency and to monitor, arrange, organize and manage the vessel traffic movements in interaction with vessels with a view to protect the sea environment as well as to provide one or more of the services of information, navigation assistance and traffic organization in some or all of the regional VTS areas. Regional VTS Systems consist of 24 Traffic Monitoring Stations and 3 Vessel Traffic Services Centers.

The main components of the system are, x-band microwave radars, closed circuit tv cameras, automatic weather stations, VHF/direction finder stations, VHF/ MF/ HF/ Inmarsat-C communication equipment’s, record and replay units and Automatic Identification System base stations.

In these new VTS’s, in addition to the existing TSVTS there will be some improved features such as, port management and information module which will be established in order to monitor and manage all the movements of the vessels and cargoes in the territorial waters of Turkey.

Automatic Identification System (AIS)

As another safety and security arrangement, AIS based traffic monitoring and management system covering all Turkish coastal waters and beyond provides a complete picture of traffic in Turkey’s surrounding seas with all the pertinent details and contains several additional searches, backtracking and viewing functions was established on 09th July 2007.

System provides opportunity to monitor all vessels and marine vehicles having AIS transponder within the coverage area and also to obtain detailed information, a number of goals, such as increasing navigation safety and maritime security through our coasts; to make contribution to Search and Rescue activities; to prevent maritime accidents and to intervene maritime accidents immediately; to cooperate with other institutions concerning illegal migration and violations of fishing boats in foreign territorial waters and prevention of illegal fishing activities are aimed. The centre of this system which covers all over the Turkish coasts with 27 Coastal Base Station is in Ankara and thereby the moves of all ships are monitored momentary.

Upgrade of AIS

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

Long Range Identification and Tracking (LRIT) System

Turkey has invested significant amount of effort, time and financial resources to ensure the timely implementation of its National LRIT Data Centre. Moreover, Turkey actively participated in all Ad Hoc LRIT Group meetings and followed all LRIT related developments with great interest and desire. Turkey’s National LRIT Data Centre is established and Application Service Provider (ASP) of Turkey is provided by TURKSAT A.S, which is the National Satellite Company of Turkey. Turkey’s National LRIT Data Center (TRNDC) has passed the developmental and integration test phases conducted by IMO satisfactorily to participate into the LRIT production environment on 8 March 2010.

İstanbul Local Traffic Control Centre

In order to enhance maritime safety and security in the boundaries of Harbour Master of İstanbul and in order to monitor the local traffic in the Strait of İstanbul, a Local Traffic Control Centre was established at the end of 2017.

MARINE TOURISM

2017

CHAPTER VI

MARINE TOURISM

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

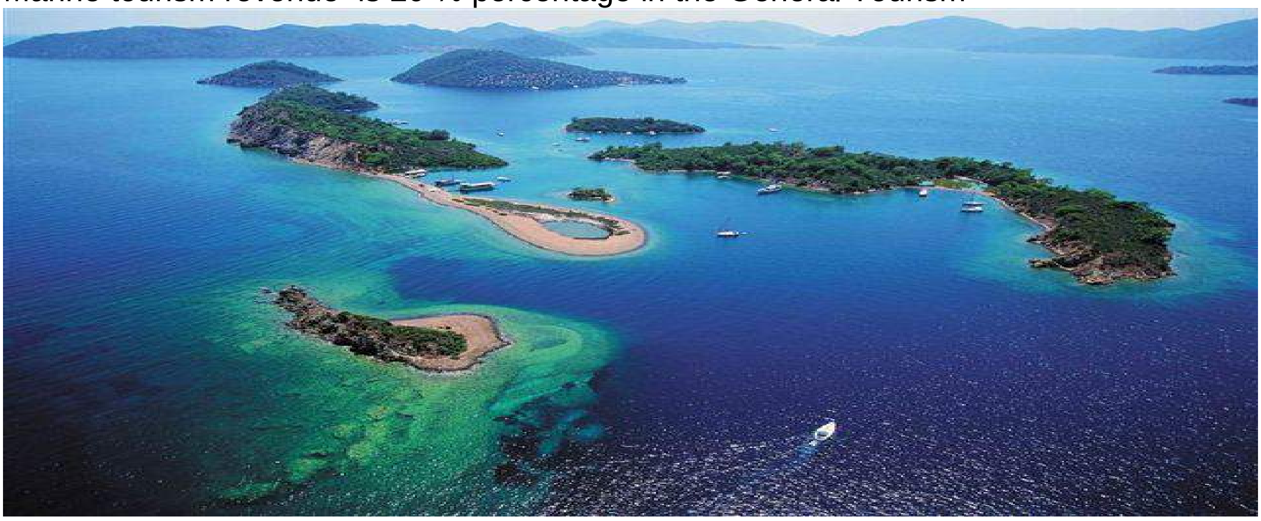
With over 8.333 kilometers of coastline along the four seas, Turkey is a treasure chest of coves, inlets, bays and beaches at which yachtsmen can choose a different and private anchorage each night.

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

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

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

Marine tourism revenue is 20 % percentage in the General Tourism



Place; GOCEK In Fethiye (12 Islands)

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

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

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

Yacht Tourism

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

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

Table (68): Yachting Companies Licenced by the Ministry of Culture and Tourism

YEARS	INVESTMENT LICENCED		OPERATION LICENCE					
			DOMESTIC YACHTS		FOREIGN YACTHS		TOTAL	
	Yat-Yachts	Yatak-Beds	Yat-Yachts	Yatak-Beds	Yat-Yachts	Yatak-Beds	Yat-Yachts	Yatak-Beds
1990	378	3.986	441	4.365	583	4.102	1.024	8.467
1991	397	4.281	460	4.559	403	2.846	863	7.405
1992	390	4.121	481	4.971	525	3.609	1.006	8.580
1993	400	4.253	474	5.034	553	3.732	1.027	8.766
1994	328	3.565	524	5.401	498	3.243	1.022	8.644
1995	336	3.655	547	5.567	412	2.616	959	8.183
1996	324	3.628	585	5.905	398	2.542	983	8.447
1997	321	3.605	606	6.071	393	2.470	999	8.550
1998	322	3.628	618	6.100	414	2.557	1.032	8.579
1999	323	3.625	612	6.013	410	2.573	1.022	8.586
2000	325	3.642	617	6.022	455	2.856	1.072	8.878
2001	307	3.551	821	7.404	480	2.977	1.301	10.381
2002	234	2.645	725	6.774	369	2.457	1.094	9.231
2003	234	2.645	725	6.905	333	2.329	1.058	9.234
2004	148	1.532	720	6.640	294	2.110	1.014	8.750
2005	97	874	723	6.394	345	2.486	1.068	8.880
2006	19	235	666	5.398	395	2.764	1.061	8.162
2007	19	235	845	6.764	381	2.748	1.133	9.512
2008	10	139	990	8.051	431	3.116	1.421	11.167
2009	10	139	964	7.841	433	3.191	1.397	11.032
2010	3	46	521	4.851	**438**	**3.240**	959	8.091
2011	4	48	992	10.292	**868**	**7.199**	1.860	17.491
2012	-	-	1.246	13.203	**829**	**6.567**	2.075	19.770
2013	-	-	1.529	15.312	**871**	**6.911**	2.400	22.223
2014	-	-	1.529	15.312	**838**	**6.674**	2.367	21.986
2015		-	1.529	15.312	**826**	**6.626**	2.355	21.938
2016		-	1.537	15.994	**608**	**5.100**	2.145	21.094
2017*	1	26	1.542	16.055	**314**	**2.555**	1.856	18.610

Source; Ministry of Culter & Tourism

Table (69): MARINE TOURISIM FACILITY & VESELLS WITH TOURISM ADMINISTRATION CERTIFICATE (2017)

MARINE TOURISM FACILITY

	Number Of Facility	Yacht Capacity Sea	Yacht Capacity Land	Total Mooring Capacity
Business Tourism Documantation of Yacht Harbour	26	8.251	3.117	11. 368
Business Tourism DocumAntation of Yacht Slipway	7	40	1.015	1.055
Investment Tourism Documantation of Yacht Harbour	10	3. 077	678	3.755
GENERAL TOTAL:	**43**	**11. 638**	**4. 810**	**16. 178**

MARINE TOURISM VESSELS

	Number of Business	Number of Yacht	Number of Beds
Business Tourism Documantation of Turkish Flag Yacht	1.141	1.537	15. 994
Investment Tourism Documantation of Turkish Flag Yacht	1	1	36
Business Tourism Documantation of Foreign Flag Yacht	26	608	5. 100
GENERAL TOTAL	**1. 168**	**2. 146**	**21. 130**

	Number of Business	Number of Vessels	Passengers Capacity
Business Tourism Documantation of One a Day Trip	**1.654**	**1. 839**	**112.301**

	Number of Business	Number of Vessels	Passenger Capasity Summer-Winter
Business Tourism Documantation of Restaurant Ship	**52**	**52**	**18. 958 / 13. 648**

Source ; Ministry of Culter & Tourism

Blue Voyage

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

Almost 75-80 % of the yacht fleet consists of traditional wooden or classical vessels sailing on the waters of Aegean and The Mediterranean for hundreds of years. The blue voyage has made an evolution in terms of boat building technologies by adapting tradition to tourism.
Since the 60’s Turkey protects sustain the building of these traditional boats in many areas on our coasts.
In the 60’s the sponge fisherman used to use the same boats for fishing purposes. The first blue cruises that were done by the Fisherman of Halicarnassos and his friends, the esteemed intellectuals of the time, went on cruises where there was no electricity no bathroom and kitchen

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

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

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

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

Five Blue Voyage Routes In Anatolia

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

Bodrum – Gökova

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

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

Datça – Bozburun

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

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

Marmaris – Fethiye

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

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

Kaş – Göcek

This route, which has received great interest in recent years, joins two important Mediterranean harbors. The Yediburunlar region, which falls between the two places, is unaccommodating of overnight stays due to generally having choppy seas. The true privilege of this route is that it includes the area of Kekova, which can be considered the most beautiful place along the Antalya–Kaş route. Continuing off the shores of Üçağız, which is studded with the ruins of the ancient harbor disguised amid carob trees, the voyage enters a brand-new, dreamlike realm in the Sunken City: ancient avenues shimmering beneath clear, turquoise-colored waters; elegant columns; ruins of buildings; stairs disappearing into the depths beneath; and fields of amphorae… The boats are floating above a mysterious Lycian town that is thought to have been plunged into the seas due to an earthquake in the second century BC. The journey continues, passing by rock tombs, monks' cells, and tiny coves, until Simena. The first long leg of the journey from here has a view of Kastelorizo (Meis) Island.

Antalya – Finike

The coves on this route promise a lovely voyage along which natural and historical beauties are intertwined. Starting in Antalya, which is one of the most important centers of tourism in the Mediterranean, the journey stops by a modern Anatolian marina in Kemer. The ancient Lycian town of Phaselis is reached right after Asar Point. Established as a triple-harbored seaside town by sailors from Rhodes in the seventh century BC, Phaselis was famed in Roman times—its golden age—for its high-quality

perfumes. As you wander the ancient streets connecting the harbors, your senses are delighted by a combination of the sound of the surf and the scent of the pines. Just a little ahead are Çıralı, Olimpos Beach, and Yanartaş, which are quite memorably beautiful. The name of the piece of land stretching northward from Taşlık Point is Çavuş Harbor. To the west of the bay, which is surrounded by green hills, there is a beach, and immediately behind it a plain. Finike, a protected harbor, is four miles northeast of Bunda Point.
Blue Voyage tours in Anatolia start in May and run through the end of October. Demand is at its most concentrated in the high season of July and August.

Statistics of The Yachts & Capacity of The Registered Yachting Facilities

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

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

Table (70): Marine Tourisim Facility with Tourism Administration Certificate (2016)

Business Tourism Documentation of Yacht Harbour

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

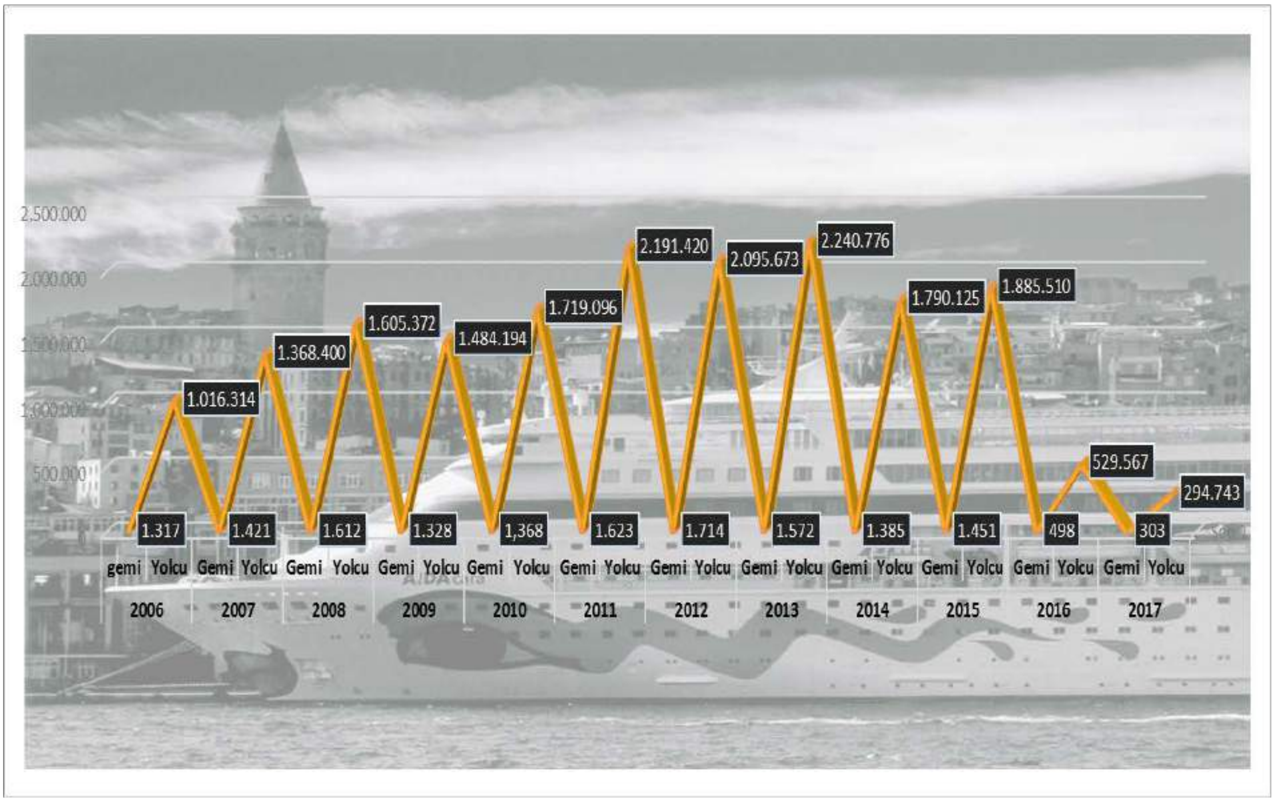
Business Tourism Documentation of Yacht Slipway				
1-Atabay Tourism	Yacht Slipway Facility	Gebze / KOCAELİ	-	60
2-Ayvalık Marina	Yacht Slipway Facility	Ayvalık / BALIKESİR	-	140
3-Albatros Marina	Yacht Slipway Facility	Marmaris / MUĞLA	40	48
4-Yat Lift	Yacht Slipway Facility	Bodrum/MUĞLA		400
5-Ağanlar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

Cruise Tourism in Turkey

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

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

Graph (62): Statistics of Cruises and Passengers Arrived at Turkish Ports Between 2006-2017



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

Table (71): Number of Transit Passengers Coming by Cruise Ships

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

Source: Minister of Transport, Maritime Affairs and Com.

Blue Flag Compaign

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

Graph (63): Numbers of Turkish Beaches, Marinas and Yachts with Blue Flags by Years

Beach Yacht Marinas

Source: TURÇEV

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

Underwater Diving

In the seas of Turkey, divers can discover a fascinating submerged world, from underwater caverns to sunken ships and even the remains of ancient cities. The only areas prohibited to diving are military zones and areas under protection. Diving for scientific research is also prohibited.
Above the water and diving off the coast of our country engaged in tourism business we have around 800 certified and authorized

Equipped Diving Rules

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

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

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

Material
There is no limit for equipment during sportive diving. Balance vest (life vest, BC), tube pressure monitor, depth monitor and time hour usage is obligatory. Usage of lifting balloon or similar materials is forbidden.
Decompressed dives are completely forbidden. High pressurized tube filling compressor in land or in ships, which requires permission from corresponding authorities, can be present during diving.
Agency, club, establishment, hotel, holiday village, school etc. who organize diving, as well as ships should provide first aid material in stock. Underwater photographing and video cameras and all kinds of related materials can be used during diving.

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

Ships to be used during dives
During underwater diving, using Turkish flag ships is a must. However, if permission is taken for foreign groups who wish to dive from their own boats, they can be used as well.   103

Diving permission

Equipped sportive diving is subject to permission. City Tourism Directorate or authorized body should be informed by clubs, organizations or institutions in order to organize diving to regions excluding forbidden zones. This information is submitted to Regional Coast Guard by correspondent authority.

All kinds of equipped sportive diving are subject to permission for foreign divers. Authorities who issue these permissions are City Tourism Directorate or authorized bodies. One copy of permission forms issued is submitted to Harbor Master and one copy is submitted to Regional Coast Guard by the issuing authority. One copy of the permission should be kept by organizers at all times and should be shown to authorities during controls. Taking permission and submitting information is not obligatory during training and diving with double person system.

FISHING

2017

CHAPTER VII

TURKISH FISHING SECTOR

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

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

60-80 % of Turkey's water products consist of pelajic fish. Pelajic fishes are mainly anchovy (Engraulis encrasicholus) and pilchard (sardina pilcharolus). Other important pelajic species are horse mackerel (Trachurus trachurus), çaça (sprattus sprattus), tirsi (Alosa alosa), chup mackerel (scomber japonicus), mackerel(scomber scombrus), blue fish (Pamatomus saltatrix), atlantic bonito (Sarda sarda) and blue fine tuna (Thunnus thynnus).Major deep sea fishes are hake (Merluccius merluccius), whitting (merlangius merlangus euxinus), stripped mullet (Mullus barbartus) and red mullet (Mullus surmelatus). Amongst the flat fishes, (Scophthalmidae-Soleidae), sea bass (Dicentrarchus labrax), hani (Serranidae), species shrimp (Penaeidae) and species squid (Loliginidae and Ommastrephidae) can be considered.
Annual fish production of Turkey is 1 million tons. 80 % of fish production comes from sea, 10% from inland water production, and 10 % from farming production.

Graph (64): Quantitiy of Captured Sea Product (2017)

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

Fishery production increased by 7.2% in 2017 . Fishery production increased by 7.2% in 2017 with respect to the previous year and occured as 630 thousand 820 tonnes. The total fishery production was composed of sea fish by 42.8%, other sea products by 8.3%, inland water products by 5.1% and aquaculture products by 43.8%.

In 2017, capture of fishery products by 5.7%, aquaculture increased by 9.1%While the production made by capture was 354 thousand 318 tonnes, aquaculture production occurred as 276 thousand 502 tonnes. The capture of marine production increased by 6.9%, capture of inland water production decreased by 5.1% with respect to the previous year.

In 2017, per capita average consumption of fish increased by 0.7% Per capita average consumption of fish was 5.45 kg in 2016 and occurred as 5.49 kg with increasing by 0.7% in 2017.

Table (72): Fisheries Statistics by The Years

	Sea Products (Tonnes)	Aquaculture Production (Tonnes)	Freshwater Products (TTonnes)
2005	380 381	118 277	46 115
2006	488 966	128 943	44 082
2007	589 129	139 873	43 321
2008	453 113	152 186	41 011
2009	425 046	158 729	39 187
2010	445 680	167 141	40 259
2011	477 658	188 790	37 097
2012	396 322	212 410	36 120
2013	339 047	233 394	35 074
2014	266 078	235 133	36 134
2015	397 731	240 334	34 176
2016	301 464	253 395	33 856
2017	322 173	276 502	32 145

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

Table (73): Quantity of Caught Sea Fish

Type of fish	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total	395 660,0	380 636,0	399 656,0	432 246,0	315 636,5	295 167,9	231 058,3	345 765,0	263 724,5	269 676,4
Akya - Leer fish	513,0	1 167,0	883,0	585,9	349,3	333,5	173,5	109,3	186,6	211,9
Avcı - Greater amberjack	75,0	96,0	53,0	31,4	43,2	54,3	9,2	8,8	7,0	8,5
Albakor (Patlakgöz) - Albacore	208,0	631,0	402,0	1 395,7	61,7	70,6	0,3	53,4	25,2	44,0
Bakalorya-Berlam - Hake-Eurepean hake	1 252,0	1 557,0	1 256,0	921,1	892,5	676,0	642,2	706,0	783,8	1 011,3
Barbunya - Red mullet	1 925,0	2 461,0	2 351,0	1 861,4	2 453,1	2 055,4	1 426,1	1 255,2	1 453,6	1 406,4
Barbunya (Paşa barbunu) - Goldon banded	110,0	317,0	446,0	427,8	337,2	88,8	34,8	25,3	78,7	69,4
Çaça - Sprat	39 303,0	53 385,0	57 023,0	87 140,8	12 091,7	9 764,0	41 647,9	76 995,6	50 224,9	33 949,5
Çipura - Seabream	1 526,0	1 186,0	1 164,0	766,1	917,7	943,5	606,3	480,9	495,1	590,0
Dil - Common sole	748,0	882,0	1 062,0	829,3	792,0	693,6	411,3	328,0	352,2	486,4
Dülger - John dory	72,0	104,0	90,0	67,4	69,1	61,5	44,8	46,0	47,1	48,3
Fangri - Common seabream	176,0	177,0	132,0	69,7	50,8	70,7	36,3	31,3	25,3	28,8
Fener balığı - Angler fish	360,0	317,0	219,0	193,0	199,2	204,6	190,0	166,0	176,0	185,2
Gelincik - Shore rockling	11,0	21,0	9,0	15,3	9,4	14,1	11,6	7,4	10,4	11,7
Gobene (Tombik) - Frigate mackerel	836,0	1 873,0	1 081,0	2 551,8	907,2	863,3	561,7	476,0	406,8	474,1
Grenyüz - Meagre	56,0	23,0	101,0	30,9	56,9	16,5	17,5	20,0	23,6	10,1
Gümüş - Silverside	1 142,0	1 721,0	1 442,0	1 472,7	935,5	886,3	447,1	326,9	516,5	489,3
Hamsi - Anchovy	251 675,0	204 699,0	229 023,0	228 491,4	163 981,9	179 615,2	96 440,0	193 492,3	102 595,2	158 093,8
Hani - Painted comber	229,0	51,0	23,0	34,2	40,0	36,6	44,6	16,8	17,9	12,1
İskarmoz - Eurepean barracude	218,0	178,0	459,0	228,1	212,7	370,1	124,7	171,3	115,7	96,2
İskorpit - Black skorpion fish	362,0	339,0	254,0	196,4	367,3	192,2	201,9	143,2	138,6	306,0
İsparoz - Annular bream	298,0	427,0	745,0	195,9	129,2	106,6	58,7	75,0	84,2	86,6
İstavrit(Kraça)-Horse mackerel	22 134,0	20 373,0	14 392,0	18 072,7	24 625,3	21 817,8	12 213,2	14 290,4	8 859,8	8 065,6
İstavrit (Karagöz) - Scad	10 043,0	7 895,0	6 055,0	6 937,3	6 320,7	6 606,3	4 110,4	2 373,1	2 288,6	4 919,3
İşkine - Brown mearge	41,0	32,0	20,0	6,6	5,6	2,5	7,6	5,0	4,5	3,0
İzmarit - Picarel	742,0	1 116,0	1 243,0	877,5	903,2	765,7	349,9	332,0	328,9	285,9
Kalkan - Turbot	528,0	383,0	295,0	166,4	202,7	209,4	197,8	239,3	221,1	167,4
Karagöz - Two banded bream	263,0	282,0	202,0	152,6	195,2	123,0	147,9	108,8	125,0	210,9
Kayabalığı - Gobies	164,0	124,0	130,0	95,8	147,7	67,2	42,8	38,5	50,5	2,8
Kefal - Grey mullet	3 345,0	2 987,0	3 119,0	2 513,8	4 010,4	2 504,9	1 721,0	1 782,9	1 825,7	2 313,6
Keler - Angelshark	34,0	20,0	19,0	15,7	13,3	17,0	8,3	1,3	2,8	0,9
Kılıç - Sword fish**	386,0	301,0	334,0	189,6	79,7	96,8	55,7	34,9	76,5	441,0
Kırlangıç - Red gurnard	362,0	320,0	316,0	211,6	272,3	220,4	66,4	54,3	54,3	56,6
Kırlangıç (Mazak) - Trigla lineata	24,0	47,0	92,0	54,7	37,3	26,8	6,5	2,9	4,2	7,5
Kolyoz - Chup mackerel	1 818,0	2 952,0	2 004,0	3 127,0	2 182,7	2 573,7	1 695,0	1 209,9	1 602,0	2 043,0
Köpek - Topeshark	413,0	618,0	285,0	369,5	183,3	110,9	108,9	77,6	22,3	23,2
Kupez - Bogue	2 580,0	2 919,0	2 761,0	2 113,5	1 421,9	2 226,2	2 208,4	2 207,8	2 795,1	3 175,0
Lahoz - Waker	313,0	566,0	672,0	396,6	311,9	260,5	191,5	166,9	230,6	32,6
Levrek - Seabas	751,0	615,0	577,0	316,5	424,0	186,9	110,5	139,0	131,7	135,1
Lipsöz - Small-Scalled	35,0	107,0	80,0	84,2	27,6	51,3	20,4	17,3	28,2	20,4
Lüfer - Blue fish	4 048,0	5 999,0	4 744,0	3 122,0	7 389,5	5 225,2	8 386,3	4 135,7	9 573,6	1 935,7
Melanurya -Saddled seabream	128,0	241,0	243,0	112,8	139,4	113,6	127,9	59,3	90,2	92,3
Mercan - Striped bream	634,0	724,0	742,0	635,6	1 091,0	990,0	788,9	895,5	980,0	1 171,7
Mezgit - Whiting	12 231,0	11 146,0	13 558,0	9 454,8	7 367,1	9 396,9	9 555,1	13 158,3	11 540,8	8 248,0
Mığrı - European coger	77,0	3,0	8,0	0,8	3,9	1,5	0,2	1,4	2,6	0,3
Mırmır - Conger eel	349,0	390,0	281,0	196,2	113,4	122,6	143,8	83,1	123,7	152,3
Minekop - Croaker	22,0	24,0	41,0	23,7	14,0	25,8	91,1	28,9	30,9	26,7
Orfoz - Dusky grouper	25,0	83,0	63,0	34,0	23,0	20,1	13,4	16,6	11,0	3,1
Orkinos - Bluefin tuna*	887,0	981,0	423,0	527,5	535,5	551,4	555,0	1 091,0	1 324,0	1 514,7
Yazılı Orkinos - Little tunny	1 072,0	1 309,0	1 046,0	1 437,4	1 644,7	1 385,8	681,9	325,5	184,1	479,8
Öksüz - Piper	14,0	12,0	14,0	15,2	13,9	9,4	8,3	11,6	3,4	2,5
Palamut-Torik - Atlantic bonito	6 448,0	7 036,0	9 401,0	10 018,9	35 764,2	13 157,6	19 031,5	4 573,0	39 459,6	7 577,6
Patlakgöz mercan - Large-eye dentex	143,0	98,0	91,0	53,6	55,1	33,7	19,3	27,5	32,9	9,4
Pisi - Flounder	100,0	156,0	104,0	47,3	26,8	80,7	6,2	9,8	8,8	7,1
Sardalya - Pilchard	17 531,0	30 091,0	27 639,0	34 708,6	28 248,0	23 919,0	18 077,2	16 693,4	18 162,1	23 425,7
Sarıgöz - Black sea bream	30,0	30,0	38,0	23,8	48,9	25,9	26,9	21,9	51,4	19,8
Sarpa - Saupe	190,0	348,0	305,0	166,9	150,1	203,1	145,1	189,1	127,6	144,6
Sinagrit - Dentex	146,0	165,0	170,0	82,8	81,2	60,3	55,0	58,9	53,9	47,2
Sivriburun karagöz - Sharpsnout seabream	17,0	26,0	21,0	13,8	8,8	6,4	3,7	1,2	2,1	2,1
Tekir - Striped red	1 978,0	2 818,0	4 455,0	3 876,5	3 766,7	2 332,8	3 616,5	3 476,4	3 047,0	2 074,4
Tirsi - Twaite shad	2 289,0	3 070,0	2 574,0	2 581,5	1 699,3	1 541,0	2 094,4	2 034,7	1 642,0	1 576,2
Trança - Blue spatled bream	119,0	86,0	115,0	46,7	19,9	31,4	22,3	8,1	13,5	17,2
Uskumru - Mackerel	516,0	505,0	226,0	147,3	200,9	119,0	46,6	102,9	61,9	728,2
Vatoz - Thornback ray	591,0	707,0	668,0	401,0	275,2	299,0	196,4	168,6	116,1	183,0
Zargana - Gar fish	335,0	346,0	661,0	317,1	232,1	204,7	334,4	314,2	267,8	252,8
Zurna - Saury	348,0	487,0	565,0	319,2	283,3	191,1	218,8	102,8	131,3	152,9
Diğer - Other	321,0	486,0	646,0	673,1	178,2	135,2	419,4	159,0	266,0	307,7

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

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

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

Table (74): Quantity of Caught Other Sea (Crustaceas, Molluscas)

Quantity of caught other sea fish (crustaceas, molluscs) Tonnes

Type of fish	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total	**57 453,0**	**44 410,0**	**46 024,0**	**45 412,4**	**80 685,5**	**43 879,0**	**35 019,3**	**51 965,7**	**37 739,1**	**52 496,1**
Ahtapot - Octopus	681,0	649,0	509,0	321,8	361,0	283,6	253,7	215,0	245,9	162,7
Böcek - Spiny lobster	20,0	26,0	26,0	25,8	9,4	11,5	1,1	3,4	1,1	5,0
Deniz kereviti - Norway lobster	35,0	43,0	19,0	24,8	5,5	5,7	1,1	0,1	0,1	1,4
Deniz salyangozu - Sea snail	11 442,0	6 085,0	8 437,0	6 533,8	9 596,0	8 654,8	7 003,6	8795,3	10 353,7	9 194,1
İstakoz - Common lobster	15,0	8,0	7,0	4,7	8,0	7,0	1,4	3,9	1,5	1,8
İstiridye - Oystre	13,0	-	1,0	5,9	0,0	11,2	0,1	0,2	-	-
Kalamerya - Long finned squid	537,0	576,0	528,0	394,1	530,9	491,3	409,5	367,2	389,0	421,9
Erkek karides - Speckled shrimp	437,0	329,0	417,0	301,2	255,1	237,9	53,5	39,6	50,1	54,1
Jumbo karides - Green tiger prawn	405,0	531,0	562,0	543,4	640,9	451,8	469,5	489,5	719,8	728,6
Karabiga karides - Caramote prawn	449,0	442,0	951,0	642,9	383,9	354,4	271,9	278,7	252,4	208,0
Kırmızı karides - Giant gamba prawn	754,0	1 239,0	1 362,0	1 800,9	2 157,7	1 363,6	1 119,6	1 423,0	1 669,1	1 382,8
Pembe karides (Çimçim) - Deep water rose	2 623,0	2 073,0	1 413,0	1 481,5	1 600,5	1 619,9	2 501,8	1 764,4	1 809,5	2 356,8
Akıvades (Kum midyesi)-Carpet shell	1 255,0	68,0	56,0	26,7	14,9	83,4	8,8	5,3	4,8	-
Beyaz kum midyesi - Striped venus	36 896,0	24 574,0	26 931,0	30 175,6	61 225,4	28 029,7	21 827,6	37404,1	20 931,7	34 941,1
Kara midye - Mediterranean mussel	342,0	1 660,0	735,0	1 458,8	2 093,4	887,4	48,7	192,4	77,5	535,6
Kıllı midye - Bearded horse mussel	-	4 601,0	246,0	347,2	-	-	155,1	47,6	-	-
Kidonya - Warty venus	1,0	11,0	8,0	-	-	-	-	-	-	-
Mürekkepbalığı - Cuttle fish	1 502,0	1 258,0	1 597,0	1 163,3	1 396,1	1 244,1	696,8	744,7	925,1	986,0
Pavurya - Common shore crab	8,0	7,0	3,0	8,7	21,6	7,3	4,5	4,9	6,0	1,3
Tarak - Great Scallop	-	-	4,0	17,8	-	3,0	0,1	0,9	-	-
Mavi yengeç - Blue crab	17,0	77,0	46,0	10,7	2,1	0,6	1,5	0,6	2,0	8,8
Diğer - Other	21,0	153,0	2 166,0	122,8	383,1	130,8	189,4	184,9	299,8	1 506,1

Source: Data on sea products is compiled by the Monthly Large Scale Fishermen and Sesonal Small Scale Fishermen Catch Survey.

Table (75): Agriculture Production

Tonnes

Type of fish	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Toplam - Total	**152 186,0**	**158 729,0**	**167 141,0**	**188 790,0**	**212 410,0**	**233 393,9**	**235 133,0**	**240 334,0**	**253 395,0**	**276 502,0**
Inland water										
Alabalık (Gökkuşağı) - Trout (Rainbow trout)	65 928,0	75 657,0	78 165,0	100 239,0	111 335,0	122 873,3	107 533,0	100 411,0	99 712,0	101 761,0
Alabalık (Salmo sp.) - Trout (Salmo sp.)*	-	-	-	-	-	-	450,0	755,0	1 585,0	1 944,0
Aynalı sazan - Carp	629,0	591,0	403,0	207,0	222,0	145,5	157,0	206,0	196,0	233,0
Mersin balığı - Sturgeon*	-	-	-	-	-	-	17,0	28,0	6,0	13,0
Tilapya - Tilapia*	-	-	-	-	-	-	32,0	12,0	58,0	8,0
Yayın - European catfish**	-	-	-	-	-	-	-	-	-	8,0
Kurbağa - Frog*	-	-	-	-	-	-	50,0	43,0	44,0	43,0
Deniz - Marine water										
Alabalık (Gökkuşağı) - Trout (Rainbow trout)	2 721,0	5 229,0	7 079,0	7 697,0	3 234,0	5 186,2	4 812,0	6 187,0	4 643,0	4 972,0
Alabalık (Salmo sp.) - Trout (Salmo sp.)*	-	-	-	-	-	-	798,0	685,0	1 073,0	980,0
Çipura - Sea bream	31 670,0	28 362,0	28 157,0	32 187,0	30 743,0	35 701,1	41 873,0	51 844,0	58 254,0	61 090,0
Levrek - Sea bass	49 270,0	46 554,0	50 796,0	47 013,0	65 512,0	67 912,5	74 653,0	75 164,0	80 847,0	99 971,0
Fangri - Common seabream*	-	-	-	-	-	-	106,0	143,0	225,0	20,0
Antenli mercan - Bluespotted seabream**	-	-	-	-	-	-	-	-	-	122,0
Kırmızı bantlı mercan - Redbanded seabream**	-	-	-	-	-	-	-	-	-	66,0
Minekop (Kötek) - Corb*	-	-	-	-	-	-	39,0	61,0	20,0	125,0
Grenyüz (Sarıağız) - Meagre*	-	-	-	-	-	-	3 281,0	2 801,0	2 463,0	697,0
Sinagrit - Dentex*	-	-	-	-	-	-	113,0	132,0	43,0	51,0
Sivri burun karagöz - Sharpsnout seabream*	-	-	-	-	-	-	8,0	59,0	2,0	-
Trança - Blue spatled bream*	-	-	-	-	-	-	75,0	90,0	61,0	107,0
Orkinos - Bluefin tuna*	-	-	-	-	-	-	1 136,0	1 710,0	3 834,0	3 802,0
Midye - Mussel	196,0	89,0	340,0	5,0	-	-	-	3,0	329,0	489,0
Diğer - Other	1 772,0	2 247,0	2 201,0	1 442,0	1 364,0	1 575,3	-	-	-	-

*It was compiled starting from 2014.

*It was compiled starting from 2017.

Source: Data on administrative register of Ministry of Food, Agriculture and Livestock

37.6% of the amount of aquaculture production took place at the inland waters and 62.4% at the seas.Within all the production of marine products by capture, East Black Sea Region was the first by the ratio of 49%. The regions West Black Sea by 24.2%, Aegean by 14.8%, Marmara by 7.7% and Mediterranean by 4.3% followed this region

Fishing Fleet and Catching Water Products

Our fleet is using high-tech equipments and our fishing reserves are more than our yearly fishing capacity.
At present, we have 18.024 (2017 year) registered fishing boats.
The fishing technology in Turkey is considered to be efficient. Seaborn fishing is being done by artisanal fishing (extension meshes,drag side meshes,pareketa,fish trap) and industrial fishing (Purserseine-trawler)
The types of fishing, common in Turkey are short distance fishing and shore fishing (medium distance fishing). The ocean type (off-shore) fishing is in the beginning process. As of end of 2017, there are 128 fisherman shelters, 44 smaller type of fisherman shelters and 58 slips.
Corporate bodies and persons should have fishing certificates according to Water Products Law Number 1380. The Ministry of Agriculture may restrict the certificates in order to protect of fishing potential. There are 18,024 certificated fishing vessels in Turkey and 1,010 are of big sizes. Dredging and encircle fishing is done by the fishing vessels longer then 12 meters. The Black Sea Region has the major share in fishing sector in Turkey with 1640 km coast line: there are 202 fisherman shelters and slips. In İstanbul, there are 44 shore facilities, consisting of 8 ports, 26 fisherman shelters, and 10 slips.

Fishing vessels in Turkey are generally small vessels, which are suitable for shore fishing. There are 18,024 fishing vessels in total and 83 % of these boats consists of vessels of 5-12 meters which perform shore fishing.
Production distribution of large scale fishermen, collected through survey and having vessels bigger than 10 meters, which have an important share in capture production and small scale fishermen,collected through survey, having vessels equal to or less than 10 meters.

Foreign Trade in Water Products
Exports & Imports

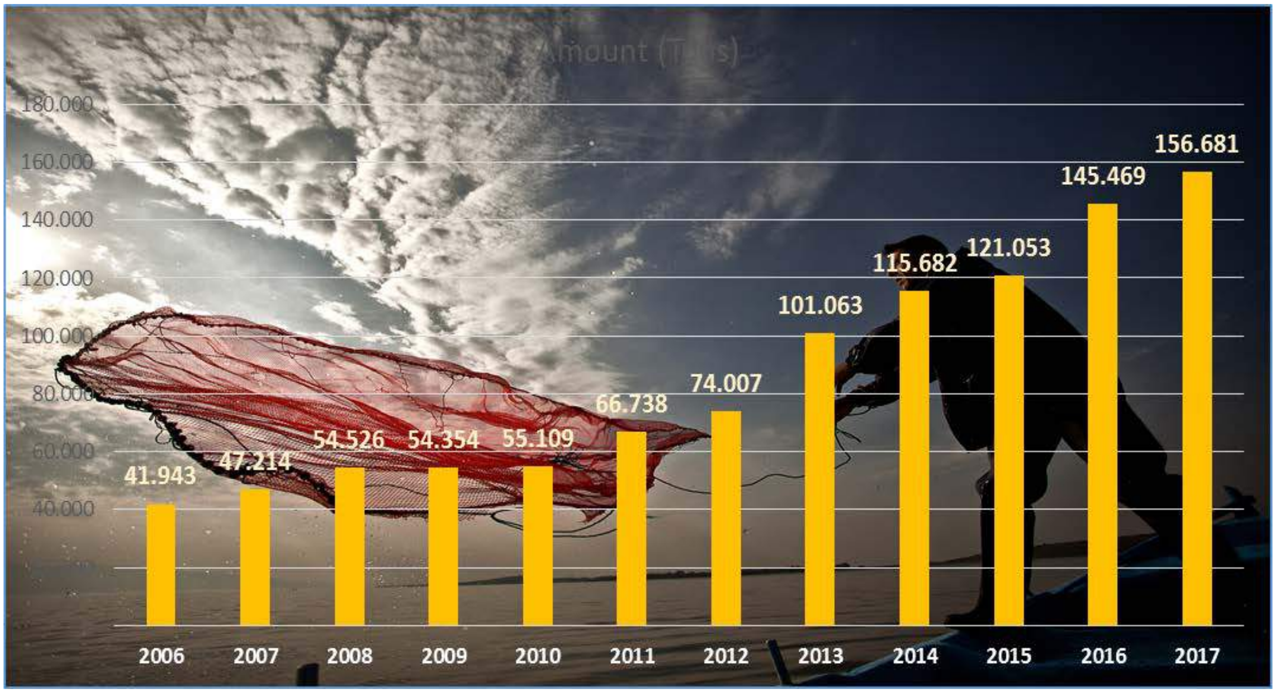
In the previous years, major part of Turkish export water products consisted of frozen fish; but currently it consists of canned fish. Export of canned-fish, is mostly realized to Germany, England, Belgium, Spain, Italy and France. Export to Far East is also developing and some of the main markets are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

As regards 2016 in our country's exports of fish products Japan has the biggest share, being followed by Holland, Greece, Italy, Spain, German, France and Lebanon . Although the markets to which our water products exportation is directed are mostly those of the European Union, we also export fish to all the regions of the world.

In 2016, as regards our country's exports of fish products, Japan has the biggest share, being followed by Holland, Greece, Italy, Spain, Germany, France and Lebanon .

Although the markets to which our water products exportation is directed are mostly those of the European Union, we also export fish to the whole world.
The amount of exports has been increased 276% in the last eleven years. Exports reached 156,681 tons in 2017; although it was 26860 tons in the year 2002.

Graph (65): Exports of Water Production (2006-2017)
Amount (Ton)



Export of seafood includes crustaceans, molluscs, and cephalopods, which may be frozen, preserved, or chilled. The EU is Turkey's primary market for fish and seafood exports, but exports are increasing to Russia, the Middle East and even the Far East and the US. Turkey also has a tuna ranching industry which catches and fattens tuna for the Japanese market.

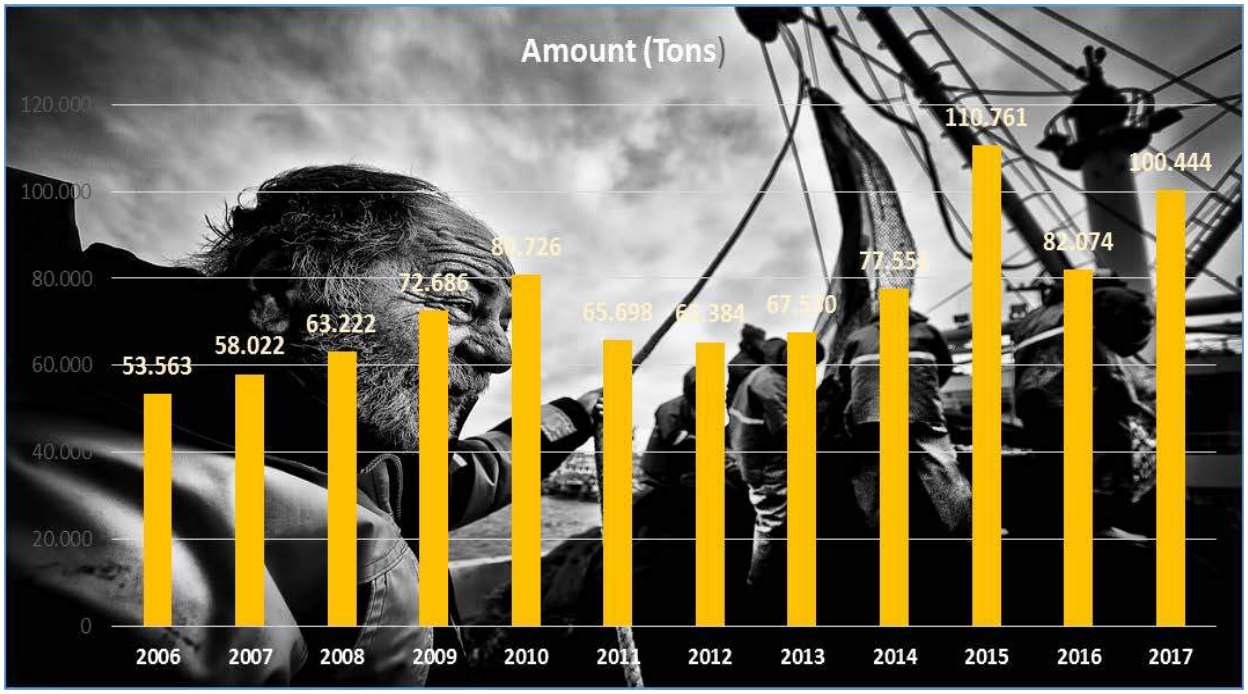
22,532 in 2002 (tons), 156,681 In 2017 the exports (tons), reaching the last eleven years, according to the amount of exports increased nearly 100 % has been achieved.

28,860 in 2002 (tons) , 300,444 in 2017 the imports (tons) reaching the last eleven years, according to the amount of exports increased nearly 100 %has been achieved

As regards 2017 in our country's imports of fish products Norway has the biggest share, being followed by France, India, USA, Morocco , Georgia and Greece

Graph (66): Imports of Water Products (2006-2017)

(Amount (Tonnes)



Turkish imports include frozen mackerel and other small pelagic fish, salmonids, and cephalopods. Imports of fishmeal and fish oil are also significant due to the large requirement for fish feed, of which fishmeal and fish oil are the main components.

Water Products Processing Industry

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

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

Maritime Education

2017

CHAPTER VIII

MARITIME EDUCATION IN TURKEY

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

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

Turkish Chamber of Shipping, which is one of the most important NGO’s of the Turkish Maritime Sector, strongly supports the Maritime Education and considers maritime training as one of its main functions and duties. Within this framework; the First Priority: has been given to the “Lack of Officers Problem” and the main objective has been to provide a solution to it in the long and medium terms. The Second Priority: has been given to the training of highly qualified and sufficient numbers of Maritime Operators.

Faculties of Maritime Studies

No	UNIVERSITY	FACULTY
1	DOKUZ EYLÜL ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
2	GİRNE ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
3	İSTANBUL TEKNİK ÜNİVERSİTESİ	KKTC EĞİTİM ARAŞTIRMA YERLEŞKELERİ
4	İSTANBUL TEKNİK ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
5	KTÜ SÜRMENE	DENİZ BİLİMLERİ FAKÜLTESİ
6	ORDU ÜNİVERSİTESİ	DENİZ BİLİMLERİ FAKÜLTESİ
7	PİRİ REİS ÜNİVERSİTESİ	DENİZCİLİK FAKÜLTESİ
8	YILDIZ TEKNİK ÜNİVERSİTESİ	GEMİ İNŞAATI VE DENİZCİLİK FAKÜLTESİ
9	İSTANBUL ÜNİVERSİTESİ	MÜHENDİSLİK FAKÜLTESİ DENİZ ULAŞTIRMA İŞLETME MÜHENDİSLİĞİ
10	RECEP TAYYİP ERDOĞAN ÜNİVERSİTESİ	TURGUT KIRAN DENİZCİLİK YÜKSEKOKULU

PİRİ REİS UNIVERSITY

The Turkish Chamber of Shipping, (İMEAK Deniz Ticaret Odası) for some time now has been interested in seafarer's training since as early as 1990. To respond to the existing and future requirements of the shipping industry, the Turkish maritime industry has invented and improved a new strategy to improve Maritime Education and Training (MET) in Turkey.

This strategy is based on the following principals;

- To provide full support to Maritime Education and Training in addition the state efforts aiming to reach golden standards beyond the STCW's minimum standards to have qualified manpower for both national and world merchant fleet
- Establishment of close cooperation between maritime industry, maritime administration and MET institutes

In order to achieve this strategy TUDEV (Turkish Maritime Education Foundation) is established in 1993. TUDEV started to support all levels of MET institutions by providing equipment and direct financial support. In 1995 TUDEV established the Institute of Maritime Studies to provide high numbers of officers for the merchant fleet. In parallel to this, TUDEV attempted a new initiative to establish a maritime university. The Piri Reis University (PRU) named after famous Turkish Admiral and cartographer, established in 2008. Turkish Chamber of Shipping supported financially to the PRU to a considerable extent in the process of its establishment and its aids continued in various ways.

The mission of the university is "to create synergy between shipping industry and academic education" and the vision is to educate young people"so that they perform their professions everywhere in the world". Under this mission and vision the aim of the PRU passes beyond a centre for seafaring officers. The Maritime Faculty aims to graduate school qualified seafaring officers for Turkish and World fleets. The Engineering Faculty of PRU is now conducting education and further studies in full spectrum of ship construction industry including marine engines and mechanical, industrial, electrical and electronics engineering. The Faculty of Economics and Administrative Sciences handles five different programmes supporting maritime economics and maritime management studies as well as finance, foreign trade, management information systems and logistics. Graduate Schools of Science and Social Sciences provide post graduate studies related to the maritime sector. Additionally Maritime Higher Vocational School provides associated degree education required for the maritime sector in ten separate fields diversifying from Ship Construction to Ship Brokering. Continuous Education Centre provides additional education and training for the Shipping sector as well as a lifelong learning programme.

The PRU simulators which are capable to simulate 3000 various auxiliary vessels and objects with a capacity of up to 200 trainees at the same time. Modern laboratories are capable to support both education and scientific research studies. Training Ship with a capacity of 200 students provides sea training and serves as a floating laboratory for engineering studies.

PRU’s commitment is to make sure that students and graduates from all disciplines will have the knowledge, skills that best meet the needs of the Maritime Communities. The talent of our academic staff, consisting of highly regarded lecturers with both professional and academic backgrounds, will fuel the synergy with our deeply rooted Turkish Maritime tradition resulting being accepted by and finding a prestigious place in the international maritime community. All of PRU commitments to the education and training of our students and graduates will be delivered at the technologically friendly Green Campus with modern resources.


LOGO
BLUE WIND
LOGO