Istanbul & Marmara, Aegean, Mediterranean, Blacksea Regions
TURKISH CHAMBER OF SHIPPING

Meclis-i Mebusan Cad. No:22 34427 Fındıklı - İstanbul / Türkiye
Phone: +90 212 252 01 30 (Pbx) Fax : +90 212 293 79 35
www.denizticaretodasi.org dto@denizticaretodasi.org

2011 MARITIME SECTOR REPORT

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Istanbul 2012

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İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACKSEA REGIONS

MARITIME SECTOR REPORT 2011

I S T A N B U L – 2012

FOREWORD

The "TURKISH SHIPPING SECTOR REPORT 2011" 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 31.12.2008 and is presented to our members,Turkish and foreign institutions.

The Report mainly contains seven chapters :

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

Second chapter includes the cargoes transported by Merchant Fleet in 2011. The developments of cabotage and foreign trade cargoes, the progress of seaborne trade by flags have been explained in detail. Within this chapter, transported cargoes by types, seaborne trade to OECD countries, BSEC and EU countries have been taken into consideration.

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

Fourth chapter covers Turkish Ports and the amount of cargo handled in 2011 and yearly developments.

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

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

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

Eighth chapter explains the maritime training affairs in Turkey.

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

Metin KALKAVAN

Chairman of the Executive Committee

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TURKISH CHAMBER OF SHIPPING

Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping, briefly the Turkish Chamber of Shipping (TCS), is an important professional organization of the Turkish maritime sector, with its headquarters in İstanbul and main branch offices in Izmir, Bodrum, Marmaris, Antalya, İskenderun, Fethiye and Karadeniz Ereğlisi, (West Black Sea Region). The TCS has representation in Ankara and also representations at all the coastal towns and cities in Turkey. Turkish Chamber of Shipping 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 region of the Sea of Marmara, the Aegean Sea coast and the Mediterranean coast of Turkey, then finally the Black Sea coast of the country.

ITS AIMS

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 the public interest. Moreover, 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 to keep the discipline, morals and solidarity of the shipping profession are the other major concerns of the Turkish Chamber of Shipping.

ITS ACTIVITIES

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

Among the members of the Turkish Chamber of Shipping are; shipowners, ship operators, shipping 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.

TCS'S MEMBERSHIP TO NATIONAL AND INTERNATIONAL ORGANIZATIONS

Turkish Chamber of Shipping is a member of The Union of Chambers and Commodity Exchanges of Turkey and The International Chamber of Commerce-The Turkish National Committee. Apart from these two national organizations, TCS is also a member of The International Chamber of Shipping(ICS),International Chamber of Commerce-International Maritime Bureau (ICC-IMB), The Federation of National Associations of Ship Brokers and Agents (FONASBA), The Baltic and International Maritime Council (BIMCO), European Community Association of Ship Brokers and Agents (ECASBA), International Association of Independent Tanker Owners (INTERTANKO) and The Baltıc Exchange, The Yacht Harbour Associations (TYHA), International Council of Marine Industry Associations (ICOMIA), European Boat Associations (EBA).

ITS PUBLICATIONS

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

ITS MEMBERS

The Turkish Chamber of Shipping has 16 representations and more than 8700 members. In accordance with Law No: 5174, concerning The Union of Chambers and Commodity Exchanges of Turkey(TOBB), every company performing activities in the field of maritime shipping has to become a Member of the Turkish Chamber of Shipping. Among the members of the Turkish Chamber of Shipping are shipowners, ship operators, ship agents, ship brokers, forwarders, tally firms, classification societies, underwriters, marine surveyors, auxiliary services, ship-yacht builders, shipyards, fishermen and many others. Its Members have been gathered in 53 Professional Commitees, according to their fields of occupation.

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

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

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

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

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

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

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

TURKISH CHAMBER OF SHIPPING HEADQUARTERS
Meclis-i Mebusan Cad. No:22 Salıpazarı 80154 İSTANBUL/TURKEY
Phone: +90 212 252 0130 (8 lines) - 243 54 95 (3 lines) Fax: +90 212 293 79 35
Telex: 24727 dto tr - 25774 dzod tr
Web: www.denizticaretodasi.org E-mail: dto@chamber-of-shipping.org.tr

TURKISH MARITIME FLEET

CHAPTER I

THE DEVELOPMENT OF TURKISH SHIPPING

A Close Investigation of the Turkish Merchant Fleet

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

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

Number and tonnage evaluations have been shown totally as of 31 December 2011.

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

Examination of the Turkish Merchant Fleet by Number and Tonnage

A general examination of the merchant fleet has been made according to number, tonnage, import and built in Turkey. Table 1 shows that, Turkish merchant fleet consists of 649 ships. The examination of the table shows that 274 ships (6,9 million DWT) have been acquired by importation and 375 ships (2,4 million DWT) have been built in Turkey.

Distribution of 649 ships by their types ; 39.75 % dry cargo ships, 17.26 % bulk carriers, 11.56 % chemical tankers, 7.9 % containers and 5.08 % oil tankers, 17.73 % other types of ships.

Distribution of the fleet by DWT (9.3 Million) ; 52.88 % bulk carriers, 14.31 % dry cargo ships, 13.3 % oil tankers, 7.06 % containers and 12.45 % other types of ships.

By DWT,9.2 % of our fleet is registered in National Ship Registry, 90.8 % of fleet is registered in International Ship Registry. By Grt, 9.8 % of our fleet is registered in National Ship Registry, 90.2 % of the fleet is registered in International Ship Registry.(Table 2)

The fleet registered in National Ship Registry (858.191 Dwt)is composed of bulk carriers (55.3 %), container ships (17.5 %), dry cargo vessels (12.7 %), chemical tankers (5.7 %), oil tankers (4.2 %) and other types of ships (4.6 %).(Table 2)

TABLE (1) The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to Import and Built (1000 GRT and over) 31.12.2011

SHIP TYPES	COUNT				DWT				GRT			
	IMPORT	BUILT	TOTAL	%	IMPORT	BUILT	TOTAL	%	IMPORT	BUILT	TOTAL	%
DRY CARGO	58	200	258	39,75	377.660	952.061	1.329.721	14,31	242.349	606.844	849.193	13,84
BULK CARRIER	98	14	112	17,26	4.528.352	383.341	4.911.693	52,88	2.599.521	234.474	2.833.995	46,19
CONTAINERS	19	27	46	7,09	313.040	343.105	656.145	7,06	253.829	269.615	523.444	8,53
DRY CARGO/CONTAINERS	4	16	20	3,08	14.328	125.922	140.250	1,51	10.234	88.927	99.161	1,62
CONTAINERS/RO-RO	1	0	1	0,15	6.910	0	6.910	0,07	4.998	0	4.998	0,08
OIL TANKERS	17	16	33	5,08	1.150.371	85.547	1.235.918	13,3	619.502	56.037	675.539	11,01
PRODUCT TANKERS	0	1	1	0,15	0	3.260	3.260	0,04	0	2.085	2.085	0,03
CHEMICAL TANKERS	20	55	75	11,56	228.676	429.642	658.318	7,09	141.694	285.564	427.258	6,96
VEGATABLE OIL TANKERS	1	0	1	0,15	3.130	0	3.130	0,03	2.123	0	2.123	0,03
LPG TANKERS	6	0	6	0,92	25.868	0	25.868	0,28	24.579	0	24.579	0,4
ASPHALT TANKERS	1	0	1	0,15	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	20	2	22	3,39	184.373	18.962	203.335	2,19	392.869	58.008	450.877	7,35
RO-RO/PASSERGER	10	4	14	2,16	24.000	4.908	28.908	0,31	56.702	7.804	64.506	1,05
FERRY BOATS	8	5	13	2,0	4.020	4.327	8.347	0,09	39.943	6.215	46.158	0,75
TRAIN FERRIES	0	7	7	1,08	0	7.291	7.291	0,08	0	11.266	11.266	0,18
TRAIN FERRIES/RO-RO	1	0	1	0,15	6.266	0	6.266	0,07	15.195	0	15.195	0,25
PASSENGER AND CARGO SHIPS	3	3	6	0,92	6.776	2.922	9.698	0,1	24.380	13.769	38.149	0,62
HARBOUR FERRIES	1	3	4	0,62	350	1.193	1.543	0,02	1.042	3.231	4.273	0,07
HARBOUR CAR FERRIES	0	20	20	3,08	0	21.078	21.078	0,23	0	26.167	26.167	0,43
TUGS	1	0	1	0,15	1.394	0	1.394	0,02	1.565	0	1.565	0,03
SERVICE SHIPS	1	1	2	0,31	338	2.576	2.914	0,03	1.013	2.206	3.219	0,05
BARGE/FLOATING POSTOON	2	0	2	0,31	19.774	0	19.774	0,21	19.608	0	19.608	0,32
FLOATING CRANE	0	1	1	0,15	0	0	0	0,0	0	6.196	6.196	0,1
OTHERS	2	0	2	0,31	4.612	0	4.612	0,05	3.854	0	3.854	0,06
TOTAL	**274**	**375**	**649**	**100,0**	**6.903.008**	**2.386.136**	**9.289.144**	**100,0**	**4.456.900**	**1.678.409**	**6.135.309**	**100,0**

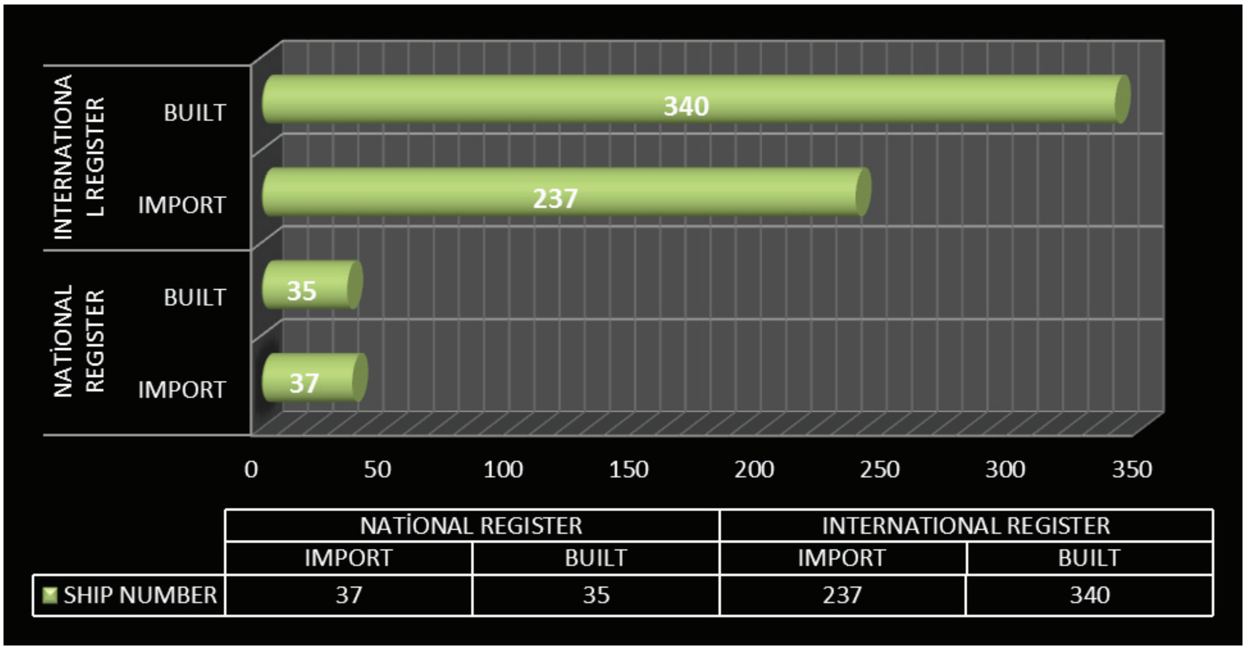
Source : Turkish Chamber of Shipping -2011

TABLE (2) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 GRT and over) 31.12.2011

SHIP TYPES	COUNT				DWT				GRT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
DRY CARGO	22	236	258	39,75	109.093	1.220.628	1.329.721	14,31	70.550	778.643	849.193	13,84
BULK CARRIER	11	101	112	17,26	474.281	4.437.412	4.911.693	52,88	272.706	2.561.289	2.833.995	46,19
CONTAINERS	8	38	46	7,09	150.264	505.881	656.145	7,06	119.746	403.698	523.444	8,53
DRY CARGO/CONTAINERS	0	20	20	3,08	0	140.250	140.250	1,51	0	99.161	99.161	1,62
CONTAINERS/RO-RO	0	1	1	0,15	0	6.910	6.910	0,07	0	4.998	4.998	0,08
OIL TANKERS	4	29	33	5,08	36.007	1.199.911	1.235.918	13,3	23.483	652.056	675.539	11,01
PRODUCT TANKERS	0	1	1	0,15	0	3.260	3.260	0,04	0	2.085	2.085	0,03
CHEMICAL TANKERS	6	69	75	11,56	48.604	609.714	658.318	7,09	32.428	394.830	427.258	6,96
VEGATABLE OIL TANKERS	1	0	1	0,15	3.130	0	3.130	0,03	2.123	0	2.123	0,03
LPG TANKERS	0	6	6	0,92	0	25.868	25.868	0,28	0	24.579	24.579	0,4
ASPHALT TANKERS	1	0	1	0,15	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	1	21	22	3,39	11.636	191.699	203.335	2,19	29.004	421.873	450.877	7,35
RO-RO/PASSERGER	1	13	14	2,16	656	28.252	28.908	0,31	1.065	63.441	64.506	1,05
FERRY BOATS	0	13	13	2,0	0	8.347	8.347	0,09	0	46.158	46.158	0,75
TRAIN FERRIES	7	0	7	1,08	7.291	0	7.291	0,08	11.266	0	11.266	0,18
TRAIN FERRIES/RO-RO	0	1	1	0,15	0	6.266	6.266	0,07	0	15.195	15.195	0,25
PASSENGER AND CARGO SHIPS	4	2	6	0,92	7.297	2.401	9.698	0,1	25.997	12.152	38.149	0,62
HARBOUR FERRIES	1	3	4	0,62	441	1.102	1.543	0,02	1.077	3.196	4.273	0,07
HARBOUR CAR FERRIES	1	19	20	3,08	2.314	18.764	21.078	0,23	1.596	24.571	26.167	0,43
TUGS	1	0	1	0,15	1.394	0	1.394	0,02	1.565	0	1.565	0,03
SERVICE SHIPS	1	1	2	0,31	338	2.576	2.914	0,03	1.013	2.206	3.219	0,05
BARGE/FLOATING POSTOON	0	2	2	0,31	0	19.774	19.774	0,21	0	19.608	19.608	0,32
FLOATING CRANE	1	0	1	0,15	0	0	0	0,0	6.196	0	6.196	0,1
OTHERS	1	1	2	0,31	2.675	1.937	4.612	0,05	2.191	1.663	3.854	0,06
TOTAL	**72**	**577**	**649**	**100,0**	**858.191**	**8.430.953**	**9.289.144**	**100,0**	**603.906**	**5.531.403**	**6.135.309**	**100,0**

Source : Turkish Chamber of Shipping -2011

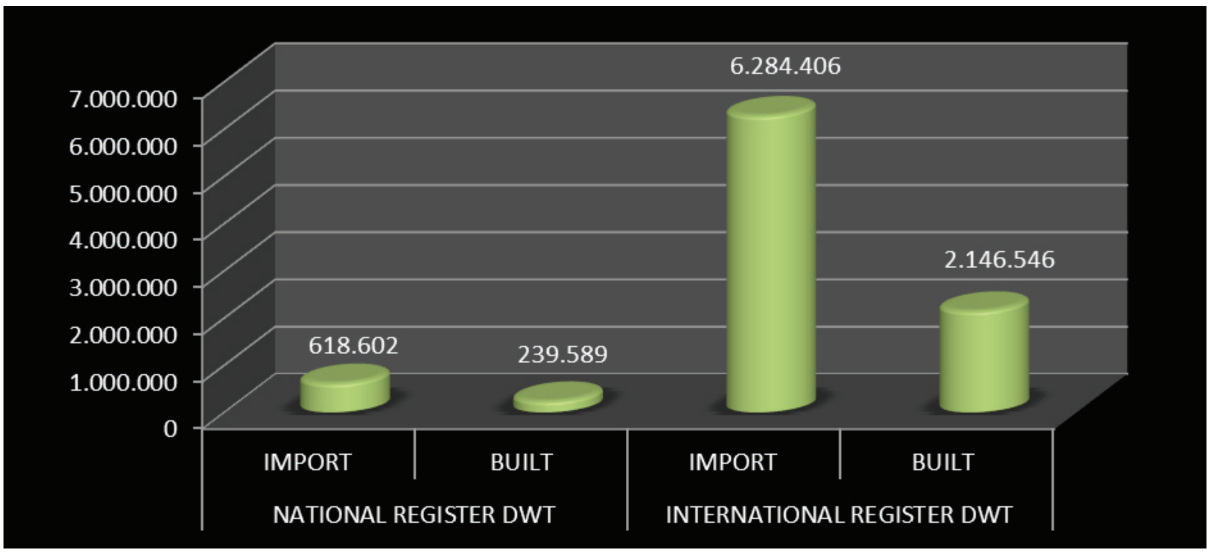
GRAPH (1) : Investigation of Registries (Number)
(1000 Grt and Over)



Tables 3-4-5 show the general statistical investigation of the Turkish merchant fleet by import and domestic built, according to Turkish National Registry and International Ship Registry.

Table 3 shows Turkish merchant fleet which consists of 649 ships. 11.1 % of total fleet (72 ships) registered in National Ship Registry and 88.9 % of total fleet (577 ships) registered in International Ship Registry.

GRAPH (2) : Examination of Registries (dwt) (1000 Grt and Over)



The majority of the fleet registered in International Ship Registry (8.4 million DWT) is composed of bulk carriers (52.6 %), dry cargo ships (14.4 %), oil tankers (14.2 %), chemical tankers (7.2 %), container (6,0 %) and other types of ships (5.6 %).

Table 3 shows that 51.4 % of the National Ship Registry (72 ships) has been acquired by import and 48.6 % has been acquired by construction in Turkey. 41.4 % of the International Ship Registry (577 ships) has been acquired by import and 58.9 % has been acquired by construction in Turkey.

Table 4 shows, 72.1 % of the National Ship Registry (858.191 dwt) has been acquired by import and 27.9 % has been acquired by construction in Turkey. 74.5 % of the International Ship Registry (8.4 million dwt) has been acquired by import and 25.5 % has been acquired by construction in Turkey.

Table 5 shows, 603.906 grt of the fleet registered in National Ship Registry 418.985 grt has been acquired by import, 184.921 grt of the fleet has been acquired by domestic built. 5.531.403 grt of the fleet registered in International Ship Registry 4.037.915 grt has been acquired by import, 1.493.488 grt of the fleet has been acquired by domestic built.

GRAPH (3) : Examination of Registries (GRT)
(1000 Grt and Over)

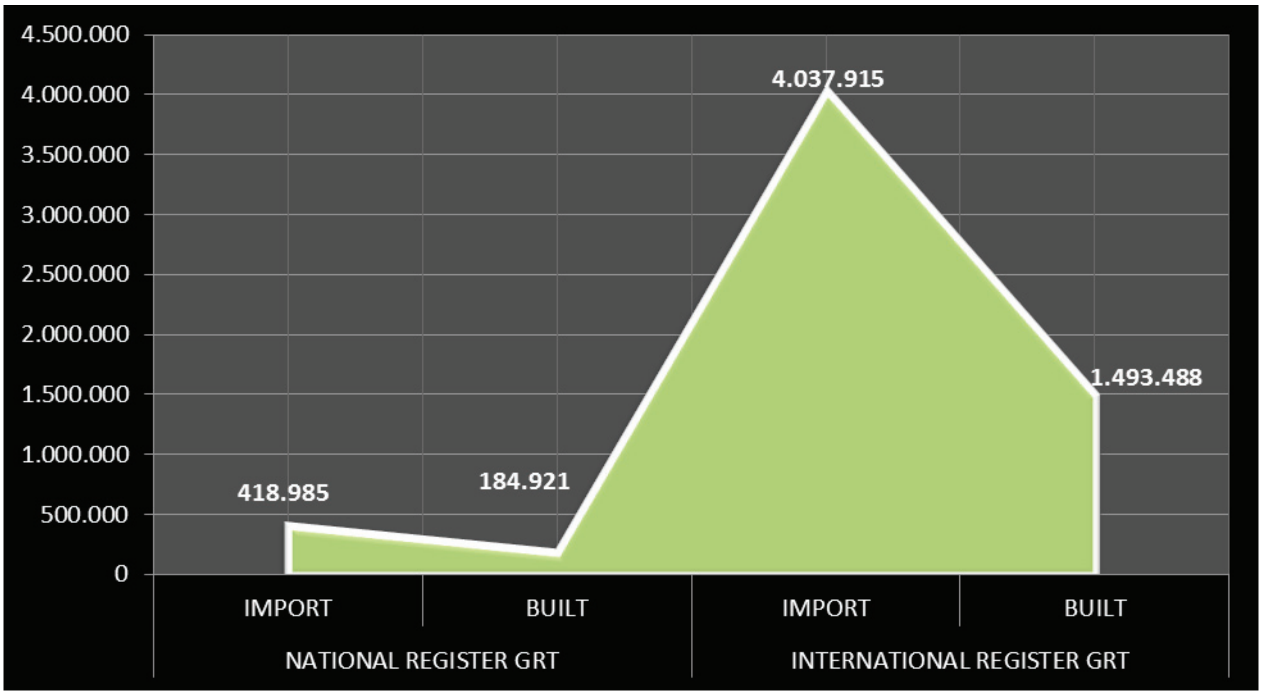


TABLE (3) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries Number (1000 GRT and over) 31.12.2011

	NATIONAL REGISTER				INTERNATIONAL REGISTER				NAT.&INT.REGISTER SHIPS				GENERAL TOTAL
	IMPORT		BUILT		IMPORT		BUILT		IMPORT		BUILT		
SHIP TYPES	**NR.**	**%**	**NR**	**%**	**NR**	**%**	**NR**	**%**	**NR.**	**%**	**NR.**	**%**	**NR.**
DRY CARGO	10	3.88	12	4.65	48	18.6	188	72.87	58	22.48	200	77.52	258
BULK CARRIER	10	8.93	1	0.89	88	78.57	13	11.61	98	87.5	14	12.5	112
CONTAINERS	5	10.87	3	6.52	14	30.43	24	52.17	19	41.3	27	58.7	46
DRY CARGO/CONTAINERS	0	0.0	0	0.0	4	20.0	16	80.0	4	20.0	16	80.0	20
CONTAINERS/RO-RO	0	0.0	0	0.0	1	100.0	0	0.0	1	100.0	0	0.0	1
OIL TANKERS	3	9.09	1	3.03	14	42.42	15	45.45	17	51.52	16	48.48	33
PRODUCT TANKERS	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1	100.0	1
CHEMICAL TANKERS	1	1.33	5	6.67	19	25.33	50	66.67	20	26.67	55	73.33	75
VEGATABLE OIL TANKERS	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1
LPG TANKERS	0	0.0	0	0.0	6	100.0	0	0.0	6	100.0	0	0.0	6
ASPHALT TANKERS	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1
RO-RO SHIPS	1	4.55	0	0.0	19	86.36	2	9.09	20	90.91	2	9.09	22
RO-RO/PASSERGER	0	0.0	1	7.14	10	71.43	3	21.43	10	71.43	4	28.57	14
FERRY BOATS	0	0.0	0	0.0	8	61.54	5	38.46	8	61.54	5	38.46	13
TRAIN FERRIES	0	0.0	7	100.0	0	0.0	0	0.0	0	0.0	7	100.0	7
TRAIN FERRIES/RO-RO	0	0.0	0	0.0	1	100.0	0	0.0	1	100.0	0	0.0	1
PASSENGER AND CARGO SHIPS	2	33.33	2	33.33	1	16.67	1	16.67	3	50.0	3	50.0	6
HARBOUR FERRIES	0	0.0	1	25.0	1	25.0	2	50.0	1	25.0	3	75.0	4
HARBOUR CAR FERRIES	0	0.0	1	5.0	0	0.0	19	95.0	0	0.0	20	100.0	20
TUGS	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1
SERVICE SHIPS	1	50.0	0	0.0	0	0.0	1	50.0	1	50.0	1	50.0	2
BARGE/FLOATING POSTOON	0	0.0	0	0.0	2	100.0	0	0.0	2	100.0	0	0.0	2
FLOATING CRANE	0	0.0	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	1
OTHERS	1	50.0	0	0.0	1	50.0	0	0.0	2	100.0	0	0.0	2
TOTAL	**37**	**5,7**	**35**	**5,39**	**237**	**36,52**	**340**	**52,39**	**274**	**42,22**	**375**	**57,78**	**649**

Source :Turkish Chamber of Shipping - 2011

TABLE (4) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries DWT (1000 GRT and over) 31.12.2011

	NATIONAL REGISTER IMPORT		NATIONAL REGISTER BUILT		INTERNATIONAL REGISTER IMPORT		INTERNATIONAL REGISTER BUILT		NAT.&INT.REGISTER SHIPS IMPORT		NAT.&INT.REGISTER SHIPS BUILT		GENERAL TOTAL
SHIP TYPES	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**
DRY CARGO	39.789	2.99	69.304	5.21	337.871	25.41	882.757	66.39	377.660	28.4	952.061	71.6	1.329.721
BULK CARRIER	417.528	8.5	56.753	1.16	4.110.824	83.69	326.588	6.65	4.528.352	92.2	383.341	7.8	4.911.693
CONTAINERS	99.760	15.2	50.504	7.7	213.280	32.51	292.601	44.59	313.040	47.71	343.105	52.29	656.145
DRY CARGO/CONTAINERS	0	0.0	0	0.0	14.328	10.22	125.922	89.78	14.328	10.22	125.922	89.78	140.250
CONTAINERS/RO-RO	0	0.0	0	0.0	6.910	100.0	0	0.0	6.910	100.0	0	0.0	6.910
OIL TANKERS	32.868	2.66	3.139	0.25	1.117.503	90.42	82.408	6.67	1.150.371	93.08	85.547	6.92	1.235.918
PRODUCT TANKERS	0	0.0	0	0.0	0	0.0	3.260	100.0	0	0.0	3.260	100.0	3.260
CHEMICAL TANKERS	1.638	0.25	46.966	7.13	227.038	34.49	382.676	58.13	228.676	34.74	429.642	65.26	658.318
VEGATABLE OIL TANKERS	3.130	100.0	0	0.0	0	0.0	0	0.0	3.130	100.0	0	0.0	3.130
LPG TANKERS	0	0.0	0	0.0	25.868	100.0	0	0.0	25.868	100.0	0	0.0	25.868
ASPHALT TANKERS	2.770	100.0	0	0.0	0	0.0	0	0.0	2.770	100.0	0	0.0	2.770
RO-RO SHIPS	11.636	5.72	0	0.0	172.737	84.95	18.962	9.33	184.373	90.67	18.962	9.33	203.335
RO-RO/PASSERGER	0	0.0	656	2.27	24.000	83.02	4.252	14.71	24.000	83.02	4.908	16.98	28.908
FERRY BOATS	0	0.0	0	0.0	4.020	48.16	4.327	51.84	4.020	48.16	4.327	51.84	8.347
TRAIN FERRIES	0	0.0	7.291	100.0	0	0.0	0	0.0	0	0.0	7.291	100.0	7.291
TRAIN FERRIES/RO-RO	0	0.0	0	0.0	6.266	100.0	0	0.0	6.266	100.0	0	0.0	6.266
PASSENGER AND CARGO SHIPS	5.076	52.34	2.221	22.9	1.700	17.53	701	7.23	6.776	69.87	2.922	30.13	9.698
HARBOUR FERRIES	0	0.0	441	28.58	350	22.68	752	48.74	350	22.68	1.193	77.32	1.543
HARBOUR CAR FERRIES	0	0.0	2.314	10.98	0	0.0	18.764	89.02	0	0.0	21.078	100.0	21.078
TUGS	1.394	100.0	0	0.0	0	0.0	0	0.0	1.394	100.0	0	0.0	1.394
SERVICE SHIPS	338	11.6	0	0.0	0	0.0	2.576	88.4	338	11.6	2.576	88.4	2.914
BARGE/FLOATING POSTOON	0	0.0	0	0.0	19.774	100.0	0	0.0	19.774	100.0	0	0.0	19.774
FLOATING CRANE	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
OTHERS	2.675	58.0	0	0.0	1.937	42.0	0	0.0	4.612	100.0	0	0.0	4.612
TOTAL	**618.602**	**6,66**	**239.589**	**2,58**	**6.284.406**	**67,65**	**2.146.546**	**23,11**	**6.903.008**	**74,31**	**2.386.136**	**25,69**	**9.289.144**

Source : Turkish Chamber of Shipping – 2011

TABLE (5) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries GRT (1000 GRT and over) 31.12.2011

	NATIONAL REGISTER				INTERNATIONAL REGISTER				NAT.&INT.REGISTER SHIPS				GENERAL
	IMPORT		BUILT		IMPORT		BUILT		IMPORT		BUILT		TOTAL
SHIP TYPES	**GRT**	**%**	**GRT**	**%**	**GRT**	**%**	**GRT**	**%**	**GRT**	**%**	**GRT**	**%**	**GRT**
DRY CARGO	25.403	2.99	45.147	5.32	216.946	25.55	561.697	66.14	242.349	28.54	606.844	71.46	849.193
BULK CARRIER	239.723	8.46	32.983	1.16	2.359.798	83.27	201.491	7.11	2.599.521	91.73	234.474	8.27	2.833.995
CONTAINERS	79.807	15.25	39.939	7.63	174.022	33.25	229.676	43.88	253.829	48.49	269.615	51.51	523.444
DRY CARGO/CONTAINERS	0	0.0	0	0.0	10.234	10.32	88.927	89.68	10.234	10.32	88.927	89.68	99.161
CONTAINERS/RO-RO	0	0.0	0	0.0	4.998	100.0	0	0.0	4.998	100.0	0	0.0	4.998
OIL TANKERS	21.664	3.21	1.819	0.27	597.838	88.5	54.218	8.03	619.502	91.7	56.037	8.3	675.539
PRODUCT TANKERS	0	0.0	0	0.0	0	0.0	2.085	100.0	0	0.0	2.085	100.0	2.085
CHEMICAL TANKERS	1.082	0.25	31.346	7.34	140.612	32.91	254.218	59.5	141.694	33.16	285.564	66.84	427.258
VEGATABLE OIL TANKERS	2.123	100.0	0	0.0	0	0.0	0	0.0	2.123	100.0	0	0.0	2.123
LPG TANKERS	0	0.0	0	0.0	24.579	100.0	0	0.0	24.579	100.0	0	0.0	24.579
ASPHALT TANKERS	1.900	100.0	0	0.0	0	0.0	0	0.0	1.900	100.0	0	0.0	1.900
RO-RO SHIPS	29.004	6.43	0	0.0	363.865	80.7	58.008	12.87	392.869	87.13	58.008	12.87	450.877
RO-RO/PASSERGER	0	0.0	1.065	1.65	56.702	87.9	6.739	10.45	56.702	87.9	7.804	12.1	64.506
FERRY BOATS	0	0.0	0	0.0	39.943	86.53	6.215	13.47	39.943	86.53	6.215	13.47	46.158
TRAIN FERRIES	0	0.0	11.266	100.0	0	0.0	0	0.0	0	0.0	11.266	100.0	11.266
TRAIN FERRIES/RO-RO	0	0.0	0	0.0	15.195	100.0	0	0.0	15.195	100.0	0	0.0	15.195
PASSENGER AND CARGO SHIPS	13.510	35.41	12.487	32.73	10.870	28.49	1.282	3.36	24.380	63.91	13.769	36.09	38.149
HARBOUR FERRIES	0	0.0	1.077	25.2	1.042	24.39	2.154	50.41	1.042	24.39	3.231	75.61	4.273
HARBOUR CAR FERRIES	0	0.0	1.596	6.1	0	0.0	24.571	93.9	0	0.0	26.167	100.0	26.167
TUGS	1.565	100.0	0	0.0	0	0.0	0	0.0	1.565	100.0	0	0.0	1.565
SERVICE SHIPS	1.013	31.47	0	0.0	0	0.0	2.206	68.53	1.013	31.47	2.206	68.53	3.219
BARGE/FLOATING POSTOON	0	0.0	0	0.0	19.608	100.0	0	0.0	19.608	100.0	0	0.0	19.608
FLOATING CRANE	0	0.0	6.196	100.0	0	0.0	0	0.0	0	0.0	6.196	100.0	6.196
OTHERS	2.191	56.85	0	0.0	1.663	43.15	0	0.0	3.854	100.0	0	0.0	3.854
TOTAL	**418.985**	**6,83**	**184.921**	**3,01**	**4.037.915**	**65,81**	**1.493.488**	**24,34**	**4.456.900**	**72,64**	**1.678.409**	**27,36**	**6.135.309**

Source : Turkish Chamber of Shipping - 2011

The Age Profile of Turkish Merchant Fleet

Table 6 shows the average age profile of Turkish Merchant Fleet according to ship types, number of ships and tonnage ranges.

The Merchant Fleet of 1.000 Grt and above comprises of 649 ships. The average age of these ships is 24.29 as of 31.12.2011.

The average age of dry cargo ships is 24 which consists of 14.3 % of the fleet. The average age of bulk carriers is 15 which consists of 52.9 % of the fleet. The average age of container is 11 and chemical tankers is 9 which consists of 7,2 % of the general fleet. The average age of oil tankers are 17 which consists of 13.3 % of the fleet.

TABLE (6) : The Average Age Profile of the Turkish Merchant Fleet 1000 GRT and Over

SHIP TYPES	NUMBER	TONNAGE (DWT)	AVE. AGE (DWT)	TONNAGE (GRT)	AVE. AGE (GRT)	AVE. AGE
DRY CARGO	258	1.329.721	23,54	849.193	23,22	24,0
BULK CARRIER	112	4.911.693	11,82	2.833.995	12,05	15,0
CONTAINERS	46	656.145	9,34	523.444	9,24	11,0
DRY CARGO/CONTAINERS	20	140.250	10,64	99.161	10,53	11,0
CONTAINERS/RO-RO	1	6.910	26,0	4.998	26,0	26,0
OIL TANKERS	33	1.235.918	9,45	675.539	9,87	17,0
PRODUCT TANKERS	1	3.260	21,0	2.085	21,0	21,0
CHEMICAL TANKERS	75	658.318	6,52	427.258	6,46	9,0
VEGATABLE OIL TANKERS	1	3.130	37,0	2.123	37,0	37,0
LPG TANKERS	6	25.868	21,72	24.579	21,75	23,0
ASPHALT TANKERS	1	2.770	31,0	1.900	31,0	31,0
RO-RO SHIPS	22	203.335	17,84	450.877	14,05	19,0
RO-RO/PASSERGER	14	28.908	30,56	64.506	27,61	21,0
FERRY BOATS	13	8.347	13,97	46.158	15,19	11,0
TRAIN FERRIES	7	7.291	43,11	11.266	40,4	40,0
TRAIN FERRIES/RO-RO	1	6.266	33,0	15.195	33,0	33,0
PASSENGER AND CARGO SHIPS	6	9.698	44,21	38.149	38,3	37,0
HARBOUR FERRIES	4	1.543	30,91	4.273	31,52	31,0
HARBOUR CAR FERRIES	20	21.078	26,85	26.167	24,49	25,0
TUGS	1	1.394	28,0	1.565	28,0	28,0
SERVICE SHIPS	2	2.914	29,94	3.219	36,7	43,0
BARGE/FLOATING POSTOON	2	19.774	13,0	19.608	13,0	13,0
FLOATING CRANE	1		0,0	6.196	21,0	21,0
OTHERS	2	4.612	31,62	3.854	32,32	36,0
Total	**649**	**9.289.144**	**22,96**	**6.135.309**	**23,49**	**24,29**

Source : Turkish Chamber of Shipping - 2011

Table 7 shows Turkish Merchant Fleet by age and tonnage ranges. Turkish Merchant Fleet consists of 649 ships of 9.289.144 DWT.

- 224 ships of 5.036.659 Dwt are between 0-9 age range,
- 99 ships of 1.388.964 Dwt are between 10-19 age range,
- 162 ships of 1.864.122 Dwt are between 20-29 age range,
- 164 ships of 999.399 Dwt are between 30 and over age range.

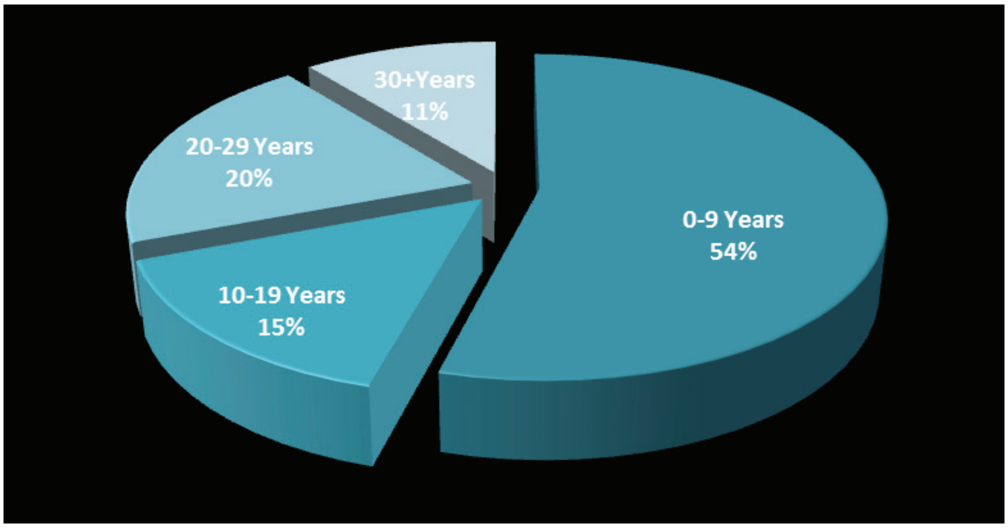
Graph shows age groups of the fleet. 54 % of the fleet are between 0-9 age range, 15 % of the fleet are between 10-19 age range, 20 % of the fleet are between 20-29 age range and 11 % are 30 years and over.

TABLE (7) : Turkish Merchant Fleet Distribution by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	No.	DWT	No.	DWT	No.	DWT	No.	DWT	No.	DWT
150 - 1499	13	7,727	10	4,678	13	7.550	12	9,258	48	29,213
1500 - 5999	81	337,278	39	146,488	77	273,801	107	324,883	304	1,082,450
6000 - 9999	30	216,719	20	161,396	32	237.220	19	128,503	101	743,838
10000 - 34999	56	1,023,732	18	351,866	20	430,004	24	434.600	118	2,240,202
35000 - 52999	7	342,238	10	485.510	16	647.090	1	36,818	34	1,511,656
53000 - 79999	24	1,474,297	1	74,167	4	268,457	1	65,337	30	1,882,258
80000 - 119999	6	515,059	0	0	0	0	0	0	6	515,059
120000+	7	1,119,608	1	164,859	0	0	0	0	8	1,284,467
Total	**224**	**5,036,659**	**99**	**1,388,964**	**162**	**1,864,122**	**164**	**999,399**	**649**	**9,289,144**

Source : Turkish Chamber of Shipping - 2011

GRAPH (4) : Turkish Merchant Fleet Distribution by Age Groups. DWT %



Below Tables show the age profile of Turkish Merchant Fleet according to tonnage ranges and ship types, dry cargo ships, bulk carriers, oil tankers, chemical tankers, containers and Ro-Ro by age and tonnage ranges.

Table 8 shows the Dry Cargo segment (258 ships) which is 1.329.721 DWT.

- 47 ships of 263.140 DWT are between 0-9 age range,
- 32 ships of 146.938 DWT are between 10-19 age range,
- 87 ships of 510.912 DWT are between 20-29 age range,
- 92 ships of 407.569 DWT are between 30 and over age range.

TABLE (8) : Dry Cargo Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**
150-1499	0	0	0	0	0	0	1	1.162	1	1.162
1500 - 7500	41	188.650	28	112,599	71	296,202	83	285,815	223	883,266
7501 - 9999	2	16.510	4	34,339	11	92,607	2	15,791	19	159,247
10000 - 34999 (HandySize)	4	57.980	0	0	4	75,277	7	105,963	15	239.220
35000 - 52999(HandyMax)	0	0	0	0	1	46,826	0	0	1	46,826
53000 - 79999 (Panamax)	0	0	0	0	0	0	0	0	0	0
80000 - 119999 (CapeSize)	0	0	0	0	0	0	0	0	0	0
120000+ (Large Size)	0	0	0	0	0	0	0	0	0	0
Total	**47**	**263.140**	**32**	**146.938**	**87**	**510.912**	**92**	**407.569**	**258**	**1.329.721**

Source : Turkish Chamber of Shipping - 2011

20 % of Dry Cargo Ships are between 0-9 age range, 11 % are between 10-19 age range, 20 % are between 20-29 age range, 31 % are 30 years and over.

GRAPH (5) : Average Age of Dry Cargo Segment DWT %

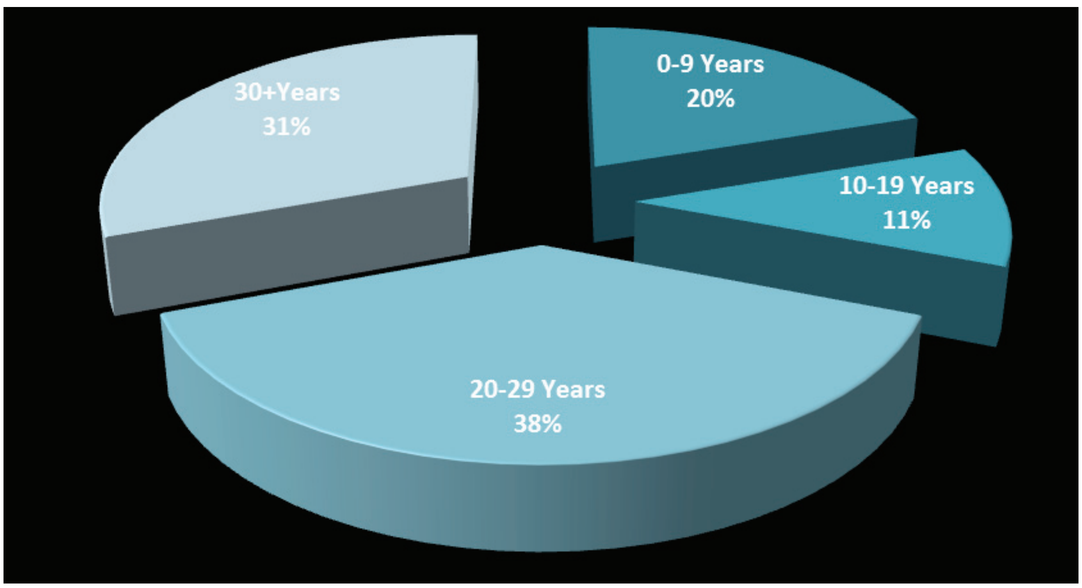


Table 9 shows the bulk carrier segment (112 ships) which is 4.911.692 DWT.

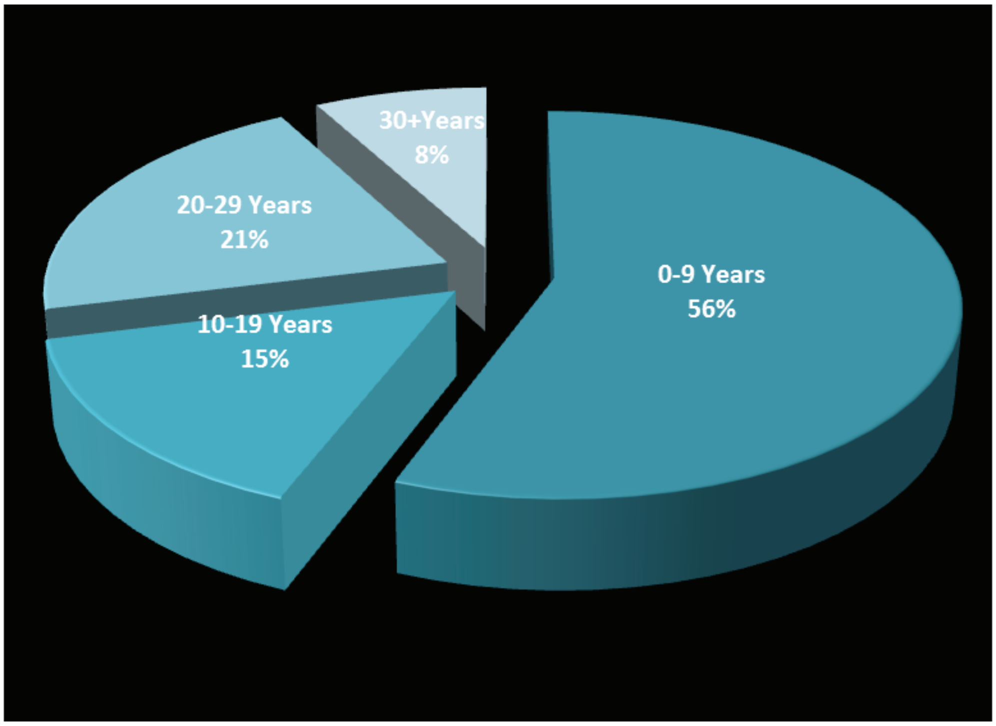
- 49 ships of 2.745.669 Dwt are between 0-9 age range,
- 19 ships of 747.167 Dwt are between 10-19 age range,
- 28 ships of 1.026.928 Dwt are between 20-29 age range,
- 16 ships of 391.929 Dwt are between 30 and over age range.

TABLE (9) : Bulk Carrier Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**
150-1499	0	0	0	0	0	0	0	0	0	0
1500 - 7500	3	17,542	0	0	1	6,317	0	0	4	23,859
7501 - 9999	0		0	0	0	0	0	0	0	0
10000 - 34999 (HandySize)	12	299,102	8	187.490	9	227,361	14	289,774	43	1,003,727
35000 - 52999(HandyMax)	2	101,241	10	485.510	15	600,264	1	36,818	28	1,223,833
53000 - 79999 (Panamax)	24	1,474,297	1	741.670	3	192,986	1	65,337	29	1,806,787
80000 - 119999 (CapeSize)	6	515,059	0	0	0	0	0	0	6	515,059
120000+ (Large Size)	2	338,428	0	0	0	0	0	0	2	338,428
Total	**49**	**2.745.669**	**19**	**747.167**	**28**	**1.026.928**	**16**	**391.929**	**112**	**4.911.693**

Source : Turkish Chamber of Shipping - 2011

GRAPH (6) : Average Age of Bulk Carriers DWT %



56 % of the bulk carriers are 0-9 age range, 15 % are 10-19 age range, 21 % are 20-29 age range and 8 % are 30 age and over.

Tablo 10 shows oil tankers segment (33) which is 1.235.918 DWT

- 14 ships of 877.454 DWT are 0-9 age range,
- 6 ships of 185.169 DWT are 10-19 age range,
- 7 ships of 154.304 DWT are 20-29 age range,
- 6 ships of 18.991 DWT are 30 age and over.

TABLE (10) : Oil Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**
150 - 1499	0	0	0	0	0	0	1	1,193	1	1,193
1500 - 5999	5	20,031	5	20.310	2	7,588	4	11,537	16	59,466
6000 - 19999	3	36,132	0	0	2	12,637	1	6,261	6	55.030
20000 - 49999 (Product Tanker)	1	40,111	0	0	2	58,608	0	0	3	98,719
50000 - 79999 (Panamax)	0	0	0	0	1	75,471	0	0	1	75,471
80000 - 109999 (Aframax)	0	0	0	0	0	0	0	0	0	0
110000 - 164999 (Suezmax)	5	781.180	1	164,859	0	0	0	0	6	946,039
165000 - 299999 (VLCC)	0	0	0	0	0	0	0	0	0	0
300000 + (ULCC)	0	0	0	0	0	0	0	0	0	0
Total	**14**	**877.454**	**6**	**185.169**	**7**	**154.304**	**6**	**18.991**	**33**	**1.235.918**

Source : Turkish Chamber of Shipping - 2011

71 % of the oil tankers are 0-9 age range, 15 % are 10-19 age range, 12 % are 20-29 age range and 2 % are 30 age and over.

GRAPH (7) : Average Age of Oil Tankers
DWT %

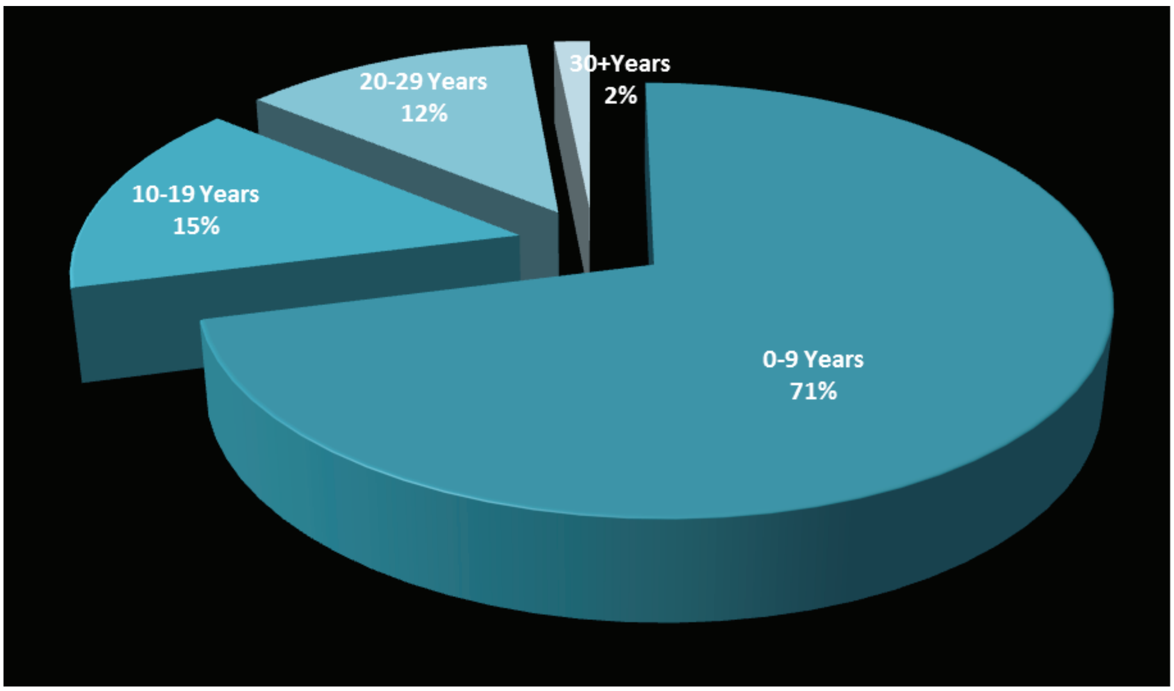


Table 11 shows the average age of the chemical tankers (75 ships) which are 658.318 DWT.

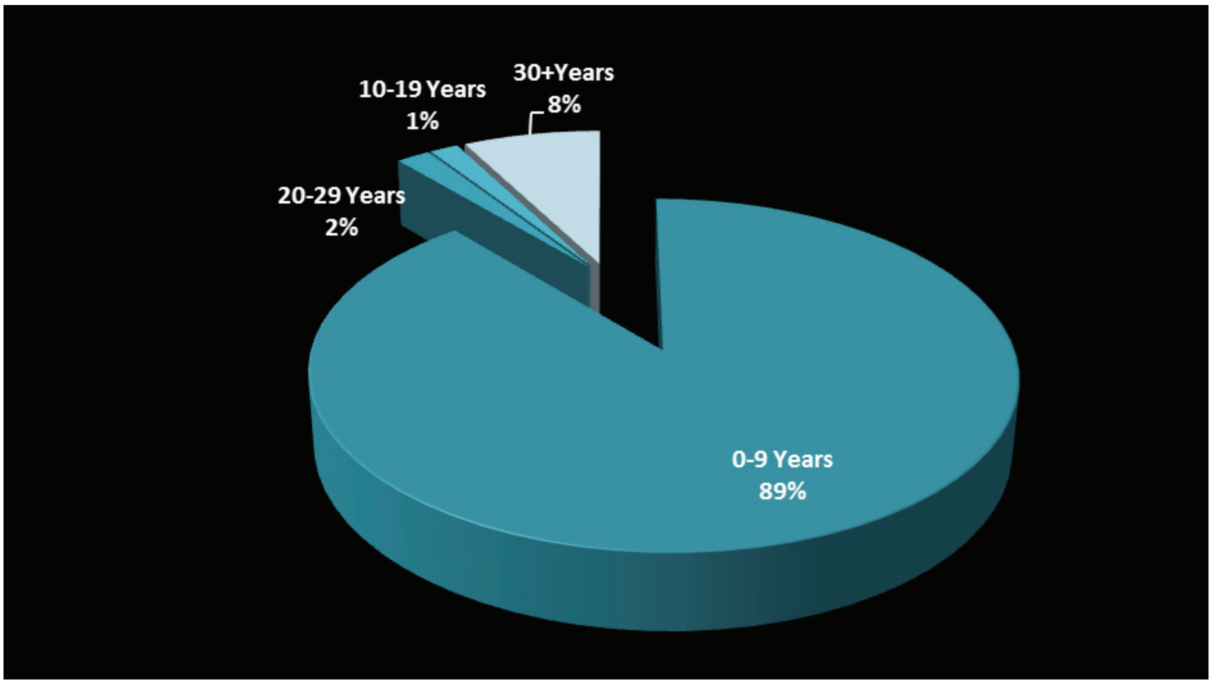
- 59 ships of 585.637 Dwt are 0-9 age range,
- 3 ships of 10.390 Dwt are 10-19 age range,
- 3 ships of 12.276 Dwt are 20-29 age range,
- 10 ships of 50.015 Dwt are 30 age and over.

TABLE (11) : Chemical Tankers by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**	**No.**	**DWT**
150 - 1499	0	0	0	0	0	0	0	0	0	0
1500 - 5999	31	125.274	3	10.390	3	12,276	7	24,222	44	172.162
6000 - 19999	22	219.477	0	0	0	0	3	25,793	25	245.270
20000 - 49999 (Product Tanker)	2	40.000	0	0	0	0	0	0	2	40.000
50000 - 79999 (Panamax)	4	200.886	0	0	0	0	0	0	4	200.886
80000 - 109999 (Aframax)	0	0	0	0	0	0	0	0	0	0
110000 - 164999 (Suezmax)	0	0	0	0	0	0	0	0	0	0
165000 - 299999 (VLCC)	0	0	0	0	0	0	0	0	0	0
300000 + (ULCc)	0	0	0	0	0	0	0	0	0	0
Total	**59**	**585.637**	**3**	**10.390**	**3**	**12.276**	**10**	**50.015**	**75**	**658.318**

Source :Turkish Chamber of Shipping - 2011

GRAPH (8) : Average age of Chemical Tankers
DWT %



89 % of other type of tankers are 0-9 age range, 1 % are 10-19 age range, 2 % are 20-29 age range and 8 % are 30 age and over.

Table 12 shows the average age of the Container ships (46 ships) which are 656.145 DWT.

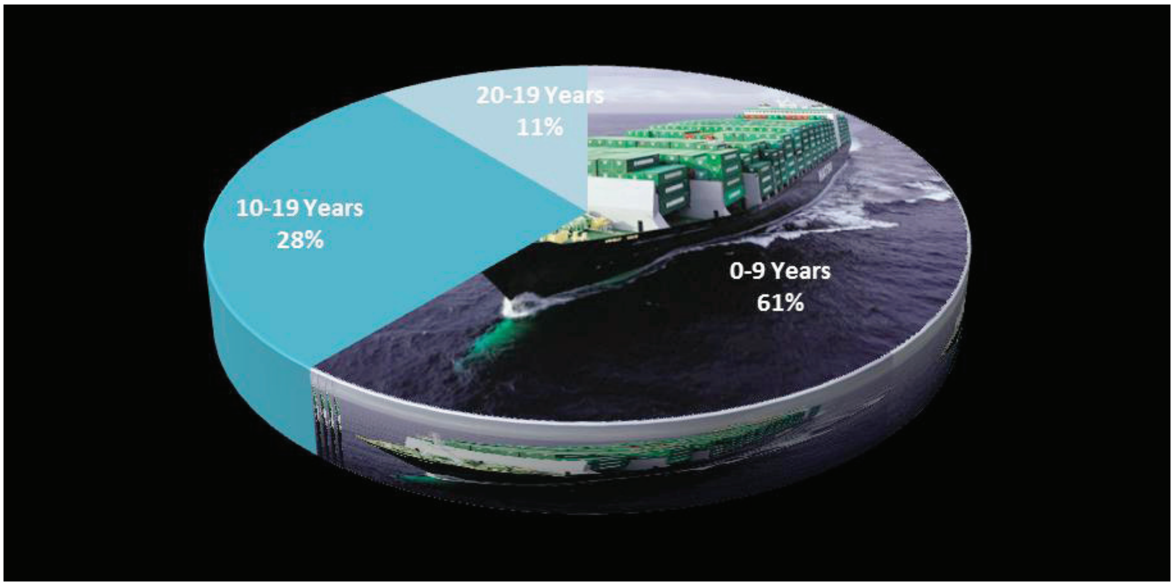
- 23 ships of 370.763 Dwt are 0-9 age range,
- 16 ships of 185.951 Dwt are 10-19 age range,
- 7 ships of 70.431 Dwt are 20-29 age range,

TABLE (12) : Container Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	No.	DWT	No.	DWT	No.	DWT	No.	DWT	No.	DWT
150 - 1499	1	1.200	0	0	0	0	0	0	1	1.200
1500 - 5999	2	8.860	3	12.990	1	4.487	0	0	6	26.337
6000 - 9999	1	6.500	4	27.440	3	25.118	0	0	8	59.058
10000 - 34999	19	383.203	9	145.521	3	40.826	0	0	31	569.550
35000 - 52999	0	0	0	0	0	0	0	0	0	0
53000 - 79999	0	0	0	0	0	0	0	0	0	0
80000 - 119999	0	0	0	0	0	0	0	0	0	0
120000+	0	0	0	0	0	0	0	0	0	0
Total	**23**	**399.763**	**16**	**185.951**	**7**	**70.431**	**0**	**0**	**46**	**656.145**

Source : Turkish Chamber of Shipping - 2011

GRAPH (9) : The Average Age of the Container ships DWT%



61 % of Container ships are 0-9 age range, 28 % are 10-19 age range and 11 % are 20-29 age range.

Tablo13 shows the average age of the Ro- Ro Ships, (22 ships) which are 203.335 DWT.

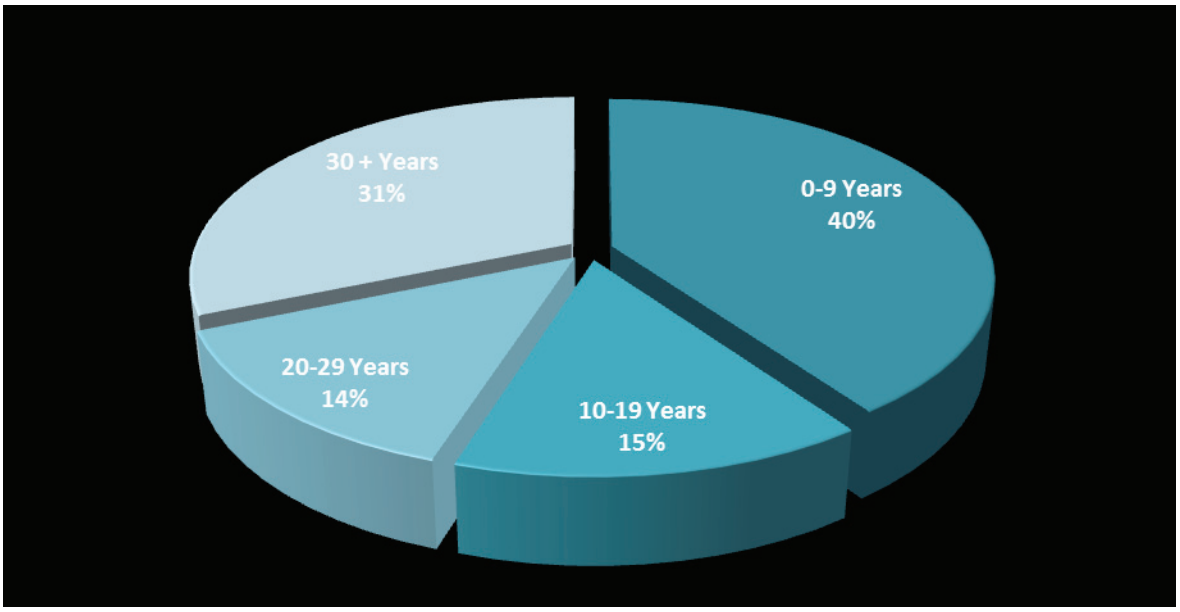
- 8 ships of 81.741 Dwt are 0-9 age range,
- 4 ship of 29.982 Dwt are 10-19 age range,
- 2 ships of 27.932 Dwt are 20-29 age range,
- 8 ships of 63.680 Dwt are 30 age range and over.
-

TABLE (13) : Ro-Ro Ships by Tonnage and Age Groups (Dwt) (1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	**NR.**	**DWT**	**NR.**	**DWT**	**NR.**	**DWT**	**NR.**	**DWT**	**NR.**	**DWT**
150 - 1499	0	0	1	457	0	0	0	0	1	457
1500 - 5999	0	0	0	0	0	0	3	10,292	3	10,292
6000 - 9999	5	47,405	3	29,525	0	0	3	24,704	11	101,634
10000 - 34999	3	34,336	0	0	2	27,932	2	28,684	7	90,952
35000 - 52999	0	0	0	0	0	0	0	0	0	0
53000 - 79999	0	0	0	0	0	0	0	0	0	0
80000 - 119999	0	0	0	0	0	0	0	0	0	0
120000+	0	0	0	0	0	0	0	0	0	0
Total	**8**	**81.741**	**4**	**29.982**	**2**	**27.932**	**8**	**63.680**	**22**	**203.335**

Source: Turkish Chamber of Shipping 2010

GRAPH (10) : The Average Age of the Ro- Ro Ships DWT%



40 % of Ro-Ro Ships are 0-9 age range, 15 % are 10-19 age range, 14 % are 20-29 age range and 31 % are 30 age and over.

Table 14 shows the average age of the Ro- Ro Ships, (22 ships) which are 450.877 GRT.

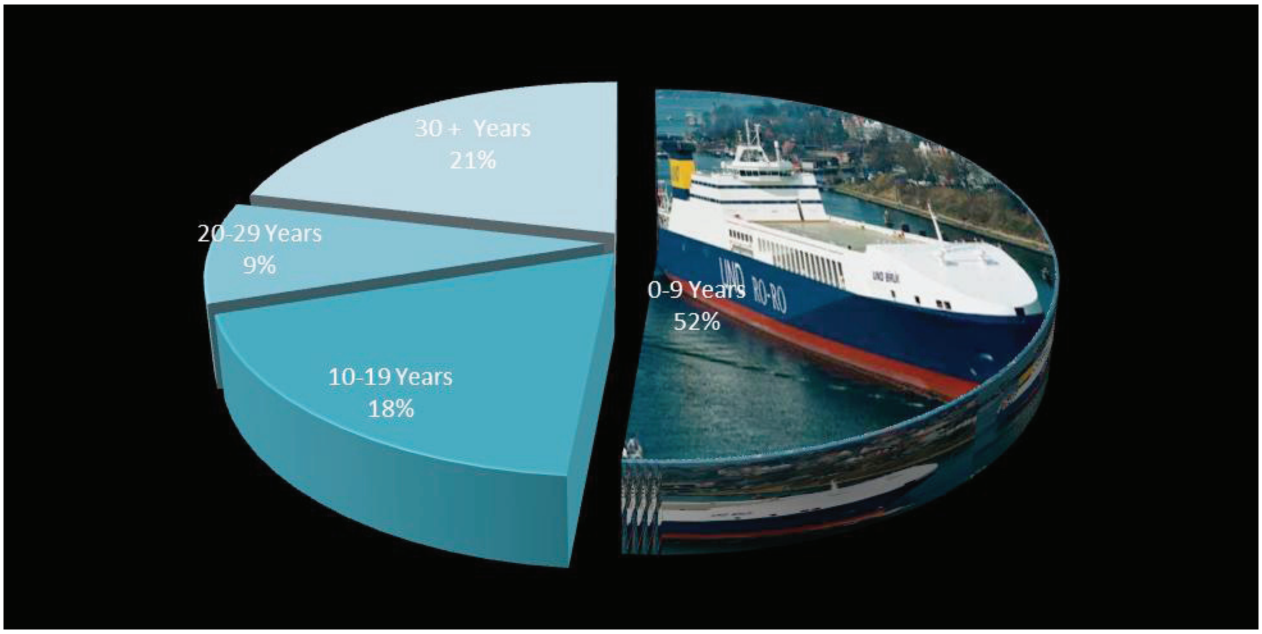
- 8 ships of 232.032 Grt are 0-9 age range,
- 4 ships of 83.187 Grt are 10-19 age range,
- 2 ships of 39.378 Grt are 20-29 age range,
- 8 ships of 96.280 Grt are 30 age range and over.

TABLE (14) : Ro-Ro Ships by Tonnage and Age Groups (GRT)
(1000 GRT and Over)

	0-9 Years		10-19 Years		20-29 Years		30 + Years		Total	
DIVISIONS OF TONNAGE	**NR.**	**GRT**	**NR.**	**GRT**	**NR.**	**GRT**	**NR.**	**GRT**	**NR.**	**GRT**
500 - 1600	0	0	0	0	0	0	0	0	0	0
1601 - 3000	0	0	0	0	0	0	1	2.981	1	2.981
3001 - 5000	0	0	1	3.780	0	0	1	4.312	2	8.092
5001 - 10000	0	0	0	0	0	0	1	6.568	1	6.568
10001 - 30000	8	232.032	3	79.407	2	39.378	5	82.419	18	433.236
30001 - 50000	0	0	0	0	0	0	0	0	0	0
50001 +	0	0	0	0	0	0	0	0	0	0
Total	**8**	**232.032**	**4**	**83.187**	**2**	**39.378**	**8**	**96.280**	**22**	**450.877**

Source : Turkish Chamber of Shipping - 2011

GRAPH (11) : The Average Age of the Ro- Ro Ship GRT %



52 % of Ro-Ro Ships are 0-9 age range, 18 % are 10-19 age range, 9 % are 20-29 age range and 21 % are 30 age and over.

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

Table 15 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 750 ships, 15,1 % of total fleet (113 ships) registered in National Ship Registry and 84,9 % of total fleet (637ships) registered in International Ship Registry.

The total DWT and GT values of ships which are 1000 DWT and over are 8.550.694 DWT and 6.157.002 GRT. The majority of these tonnage on DWT basis is composed of 51.88 % bulk carriers,15.56 % dry cargo ships and 13,38 % oil tankers.

This segment consists of the 96.8 % of the total fleet on DWT bases.

9,9 % of the dry cargo segment which is totally 1.473.642 DWT are registered in National Ship Registry, 90,1 % are registered in International Ship Registry.

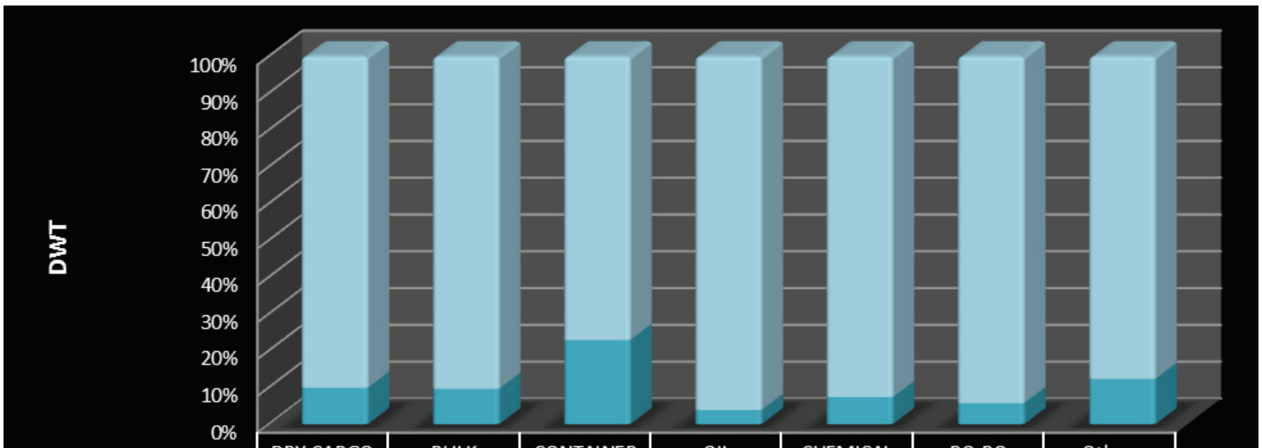
9,7 % of the dry bulk segment which is totally 4.911.693 DWT are registered in National Ship Registry, 90,3 % are registered in International Ship Registry.

3.9 % of the oil tanker segment which is totally 1.267.237 are registered in National Ship Registry, 96.1 % are registered in International Ship Registry.

7,4 % of the Chemical Tankers which are totally 659.568 DWT are registered in national Ship Registry. 92,6 % are registered in International Ship Registry.

29,9 % of the container ship segment which is totally 656.145 DWT are registered in National Ship Registry, 77,1 % are registered in International Ship Registry.

GRAPH (12) : Turkish Fleet According to Registries, 1000 DWT and Over



	DRY CARGO	BULK CARRIER	CONTAINER S	OIL TANKERS	CHEMICAL TANKERS	RO-RO SHIPS	Other
INTER. REG.	1.327.065	4.437.412	505.881	1.218.027	610.964	191.242	260.103
NATIONAL REG.	146.577	474.281	150.264	49.210	48.604	11.636	36.562

TABLE (15) The General Examination of The Turkish Merchant Fleet by Number And Tonnage According to Import and Built (1000 DWT and over) 31.12.2011

SHIP TYPES	COUNT				DWT				GRT			
	IMPORT	BUILT	TOTAL	%	IMPORT	BUILT	TOTAL	%	IMPORT	BUILT	TOTAL	%
DRY CARGO	71	289	360	48,0	395.728	1.077.914	1.473.642	15,56	252.335	677.872	930.207	15,11
BULK CARRIER	98	14	112	14,93	4.528.352	383.341	4.911.693	51,88	2.599.521	234.474	2.833.995	46,03
CONTAINERS	19	27	46	6,13	313.040	343.105	656.145	6,93	253.829	269.615	523.444	8,5
DRY CARGO/CONTAINERS	4	16	20	2,67	14.328	125.922	140.250	1,48	10.234	88.927	99.161	1,61
CONTAINERS/RO-RO	1	0	1	0,13	6.910	0	6.910	0,07	4.998	0	4.998	0,08
OIL TANKERS	20	36	56	7,47	1.155.196	112.041	1.267.237	13,38	622.369	71.295	693.664	11,27
PRODUCT TANKERS	0	1	1	0,13	0	3.260	3.260	0,03	0	2.085	2.085	0,03
CHEMICAL TANKERS	20	56	76	10,13	228.676	430.892	659.568	6,97	141.694	286.539	428.233	6,96
VEGATABLE OIL TANKERS	1	0	1	0,13	3.130	0	3.130	0,03	2.123	0	2.123	0,03
LPG TANKERS	6	0	6	0,8	25.868	0	25.868	0,27	24.579	0	24.579	0,4
ASPHALT TANKERS	1	0	1	0,13	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	19	2	21	2,8	183.916	18.962	202.878	2,14	389.089	58.008	447.097	7,26
RO-RO/PASSERGER	7	4	11	1,47	22.962	6.476	29.438	0,31	46.001	7.216	53.217	0,86
FERRY BOATS	1	1	2	0,27	1.790	1.839	3.629	0,04	10.552	1.435	11.987	0,19
TRAIN FERRIES	0	2	2	0,27	0	3.233	3.233	0,03	0	2.655	2.655	0,04
TRAIN FERRIES/RO-RO	1	0	1	0,13	6.266	0	6.266	0,07	15.195	0	15.195	0,25
PASSENGER AND CARGO SHIPS	3	1	4	0,53	6.776	1.700	8.476	0,09	24.380	10.583	34.963	0,57
HARBOUR CAR FERRIES	0	10	10	1,33	0	17.560	17.560	0,19	0	12.953	12.953	0,21
TUGS	1	0	1	0,13	1.394	0	1.394	0,01	1.565	0	1.565	0,03
SERVICE SHIPS	5	7	12	1,6	6.696	10.695	17.391	0,18	3.129	4.792	7.921	0,13
BARNE/FLOATING PONTOON	2	0	2	0,27	19.774	0	19.774	0,21	19.608	0	19.608	0,32
OTHERS	4	0	4	0,53	7.316	0	7.316	0,08	5.452	0	5.452	0,09
TOTAL	**284**	**466**	**750**	**100,0**	**6.930.888**	**2.536.940**	**9.467.829**	**100,0**	**4.428.553**	**1.728.449**	**6.157.002**	**100,0**

TABLE (16): The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries (1000 DWT and over) 31.12.2011

	NATIONAL REGISTER				INTERNATIONAL REGISTER				NAT.&INT.REGISTER SHIPS				GENERAL
	IMPORT		BUILT		IMPORT		BUILT		IMPORT		BUILT		TOTAL
SHIP TYPES	**NR.**	**%**	**NR.**	**%**	**NR.**	**%**	**NR.**	**%**	**NR.**	**%**	**NR.**	**%**	**NR.**
DRY CARGO	17	4.72	36	10.0	54	15.0	253	70.28	71	19.72	289	80.28	360
BULK CARRIER	10	8.93	1	0.89	88	78.57	13	11.61	98	87.5	14	12.5	112
CONTAINERS	5	10.87	3	6.52	14	30.43	24	52.17	19	41.3	27	58.7	46
DRY CARGO/CONTAINERS	0	0.0	0	0.0	4	20.0	16	80.0	4	20.0	16	80.0	20
CONTAINERS/RO-RO	0	0.0	0	0.0	1	100.0	0	0.0	1	100.0	0	0.0	1
OIL TANKERS	5	8.93	8	14.29	15	26.79	28	50.0	20	35.71	36	64.29	56
PRODUCT TANKERS	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1	100.0	1
CHEMICAL TANKERS	1	1.32	5	6.58	19	25.0	51	67.11	20	26.32	56	73.68	76
VEGATABLE OIL TANKERS	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1
LPG TANKERS	0	0.0	0	0.0	6	100.0	0	0.0	6	100.0	0	0.0	6
ASPHALT TANKERS	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1
RO-RO SHIPS	1	4.76	0	0.0	18	85.71	2	9.52	19	90.48	2	9.52	21
RO-RO/PASSERGER	0	0.0	1	9.09	7	63.64	3	27.27	7	63.64	4	36.36	11
FERRY BOATS	0	0.0	0	0.0	1	50.0	1	50.0	1	50.0	1	50.0	2
TRAIN FERRIES	0	0.0	2	100.0	0	0.0	0	0.0	0	0.0	2	100.0	2
TRAIN FERRIES/RO-RO	0	0.0	0	0.0	1	100.0	0	0.0	1	100.0	0	0.0	1
PASSENGER AND CARGO SHIP	2	50.0	1	25.0	1	25.0	0	0.0	3	75.0	1	25.0	4
HARBOUR CAR FERRIES	0	0.0	3	30.0	0	0.0	7	70.0	0	0.0	10	100.0	10
TUGS	1	100.0	0	0.0	0	0.0	0	0.0	1	100.0	0	0.0	1
SERVICE SHIPS	2	16.67	6	50.0	3	25.0	1	8.33	5	41.67	7	58.33	12
BARGE/FLOATING PONTOON	0	0.0	0	0.0	2	100.0	0	0.0	2	100.0	0	0.0	2
OTHERS	1	25.0	0	0.0	3	75.0	0	0.0	4	100.0	0	0.0	4
TOTAL	47	6,27	66	8,8	237	31,6	400	53,33	284	37,87	466	62,13	750

Source : Turkish Chamber of Shipping - 2010

TABLE (17) The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 DWT and over) 31.12.2011

	COUNT				DWT				GRT			
SHIP TYPES	NATIONAL REG.	INTER. REG.	TOTAL	%	NATIONAL REG.	INTER. REG.	TOTAL	%	NATIONAL REG.	INTER. REG.	TOTAL	%
DRY CARGO	53	307	360	48,0	146.577	1.327.065	1.473.642	15,56	91.508	838.699	930.207	15,11
BULK CARRIER	11	101	112	14,93	474.281	4.437.412	4.911.693	51,88	272.706	2.561.289	2.833.995	46,03
CONTAINERS	8	38	46	6,13	150.264	505.881	656.145	6,93	119.746	403.698	523.444	8,5
DRY CARGO/ CONTAINERS	0	20	20	2,67	0	140.250	140.250	1,48	0	99.161	99.161	1,61
CONTAINERS/RO-RO	0	1	1	0,13	0	6.910	6.910	0,07	0	4.998	4.998	0,08
OIL TANKERS	13	43	56	7,47	49.210	1.218.027	1.267.237	13,38	31.547	662.117	693.664	11,27
PRODUCT TANKERS	0	1	1	0,13	0	3.260	3.260	0,03	0	2.085	2.085	0,03
CHEMICAL TANKERS	6	70	76	10,13	48.604	610.964	659.568	6,97	32.428	395.805	428.233	6,96
VEGATABLE OIL TANKERS	1	0	1	0,13	3.130	0	3.130	0,03	2.123	0	2.123	0,03
LPG TANKERS	0	6	6	0,8	0	25.868	25.868	0,27	0	24.579	24.579	0,4
ASPHALT TANKERS	1	0	1	0,13	2.770	0	2.770	0,03	1.900	0	1.900	0,03
RO-RO SHIPS	1	20	21	2,8	11.636	191.242	202.878	2,14	29.004	418.093	447.097	7,26
RO-RO/PASSERGER	1	10	11	1,47	1.339	28.099	29.438	0,31	977	52.240	53.217	0,86
FERRY BOATS	0	2	2	0,27	0	3.629	3.629	0,04	0	11.987	11.987	0,19
TRAIN FERRIES	2	0	2	0,27	3.233	0	3.233	0,03	2.655	0	2.655	0,04
TRAIN FERRIES/RO-RO	0	1	1	0,13	0	6.266	6.266	0,07	0	15.195	15.195	0,25
PASSENGER AND CARGO SHIPS	3	1	4	0,53	6.776	1.700	8.476	0,09	24.093	10.870	34.963	0,57
HARBOUR CAR FERRIES	3	7	10	1,33	4.926	12.634	17.560	0,19	3.398	9.555	12.953	0,21
TUGS	1	0	1	0,13	1.394	0	1.394	0,01	1.565	0	1.565	0,03
SERVICE SHIPS	8	4	12	1,6	10.319	7.072	17.391	0,18	3.734	4.187	7.921	0,13
BARGE/FLOATING PONTOON	0	2	2	0,27	0	19.774	19.774	0,21	0	19.608	19.608	0,32
OTHERS	1	3	4	0,53	2.675	4.641	7.316	0,08	2.191	3.261	5.452	0,09
TOTAL	**113**	**637**	**750**	**100,0**	**917.134**	**8.550.694**	**9.467.829**	**100,0**	**619.575**	**5.537.427**	**6.157.002**	**100,0**

TABLE (18) : The General Examination of the Turkish Merchant Fleet Import and Domestic Built, According to Registries DWT (1000 DWT and over) 31.12.2011

	NATIONAL REGISTER				INTERNATIONAL REGISTER				NAT.&INT.REGISTER SHIPS				GENERAL
	IMPORT		BUILT		IMPORT		BUILT		IMPORT		BUILT		TOTAL
SHIP TYPES	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**	**%**	**DWT**
DRY CARGO	48.828	3.31	97.749	6.63	346.900	23.54	980.165	66.51	395.728	26.85	1.077.914	73.15	1.473.642
BULK CARRIER	417.528	8.5	56.753	1.16	4.110.824	83.69	326.588	6.65	4.528.352	92.2	383.341	7.8	4.911.693
CONTAINERS	99.760	15.2	50.504	7.7	213.280	32.51	292.601	44.59	313.040	47.71	343.105	52.29	656.145
DRY CARGO/CONTAINERS	0	0.0	0	0.0	14.328	10.22	125.922	89.78	14.328	10.22	125.922	89.78	140.250
CONTAINERS/RO-RO	0	0.0	0	0.0	6.910	100.0	0	0.0	6.910	100.0	0	0.0	6.910
OIL TANKERS	36.148	2.85	13.062	1.03	1.119.048	88.31	98.979	7.81	1.155.196	91.16	112.041	8.84	1.267.237
PRODUCT TANKERS	0	0.0	0	0.0	0	0.0	3.260	100.0	0	0.0	3.260	100.0	3.260
CHEMICAL TANKERS	1.638	0.25	46.966	7.12	227.038	34.42	383.926	58.21	228.676	34.67	430.892	65.33	659.568
VEGATABLE OIL TANKERS	3.130	100.0	0	0.0	0	0.0	0	0.0	3.130	100.0	0	0.0	3.130
LPG TANKERS	0	0.0	0	0.0	25.868	100.0	0	0.0	25.868	100.0	0	0.0	25.868
ASPHALT TANKERS	2.770	100.0	0	0.0	0	0.0	0	0.0	2.770	100.0	0	0.0	2.770
RO-RO SHIPS	11.636	5.74	0	0.0	172.280	84.92	18.962	9.35	183.916	90.65	18.962	9.35	202.878
RO-RO/PASSERGER	0	0.0	1.339	4.55	22.962	78.0	5.137	17.45	22.962	78.0	6.476	22.0	29.438
FERRY BOATS	0	0.0	0	0.0	1.790	49.32	1.839	50.68	1.790	49.32	1.839	50.68	3.629
TRAIN FERRIES	0	0.0	3.233	100.0	0	0.0	0	0.0	0	0.0	3.233	100.0	3.233
TRAIN FERRIES/RO-RO	0	0.0	0	0.0	6.266	100.0	0	0.0	6.266	100.0	0	0.0	6.266
PASSENGER AND CARGO SHIPS	5.076	59.89	1.700	20.06	1.700	20.06	0	0.0	6.776	79.94	1.700	20.06	8.476
HARBOUR CAR FERRIES	0	0.0	4.926	28.05	0	0.0	12.634	71.95	0	0.0	17.560	100.0	17.560
TUGS	1.394	100.0	0	0.0	0	0.0	0	0.0	1.394	100.0	0	0.0	1.394
SERVICE SHIPS	2.200	12.65	8.119	46.69	4.496	25.85	2.576	14.81	6.696	38.5	10.695	61.5	17.391
BARGE/FLOATING PONTOON	0	0.0	0	0.0	19.774	100.0	0	0.0	19.774	100.0	0	0.0	19.774
OTHERS	2.675	36.56	0	0.0	4.641	63.44	0	0.0	7.316	100.0	0	0.0	7.316
TOTAL	632.783	6,68	284.351	3,0	6.298.105	66,52	2.252.589	23,79	6.930.888	73,2	2.536.940	26,8	9.467.829

Source : Turkish Chamber of Shipping - 2011

The Position of The Turkish Merchant Fleet Within the World Fleet

In 2011 our tonnage under foreign flags has reached up to 11.8 billion DWT, as of 1 January 2012, concerning the ships of 1000 Grt and above, the total tonnage of the Turkish shipowners, both under Turkish flag and foreign flags reached 22.5 million DWT.

As of the beginning of 2012, regarding the Turkish Ship owners' ships of 1000 GRT and above, 37,6 % percent of these ships are registered under Turkish flag and 62,4 % are registered under foreign flags.

TABLE (19): Turkish Ships Under the National Flag and Foreign Flags (1.000 Grt and over)

	National Flag			Foreign Flag			Total Fleet Controlled	
Years	**No**	**1000 DWT**	**%**	**No**	**1000 DWT**	**%**	**No**	**1000 DWT**
1998	427	8,349	95,82	35	364	4,18	462	8,713
1999	448	8,697	90,48	69	915	9,52	517	9,612
2000	456	8,269	90,63	96	855	9,37	552	9,124
2001	445	7,321	82	107	1,607	18	552	8,928
2002	451	7,815	83,77	117	1,514	16,23	568	9,329
2003	432	7,045	79,9	147	1,772	20,1	579	8,817
2004	408	6,556	75,23	163	2,159	24,77	571	8,715
2005	420	6,427	70,23	237	2,725	29,77	657	9,152
2006	432	6,844	65,47	353	3,609	34,53	785	10,453
2007	446	6,464	58,16	424	4650	41,84	870	11,114
2008	490	6,592	50	513	6,591	50	1003	13,183
2009	520	6,736	43,9	636	8,592	56,2	1,156	15,328
2010	560	7,246	42,1	665	9,954	57,9	1,225	17,201
2011	547	7.797	39,7	672	11.863	60,3	1.219	19.660
2012	523	8.479	37,6	642	14.093	62,4	1.165	22.572

Source : ISL January-February 2012

GRAPH (13) : Progress of the Turkish Merchant Fleet

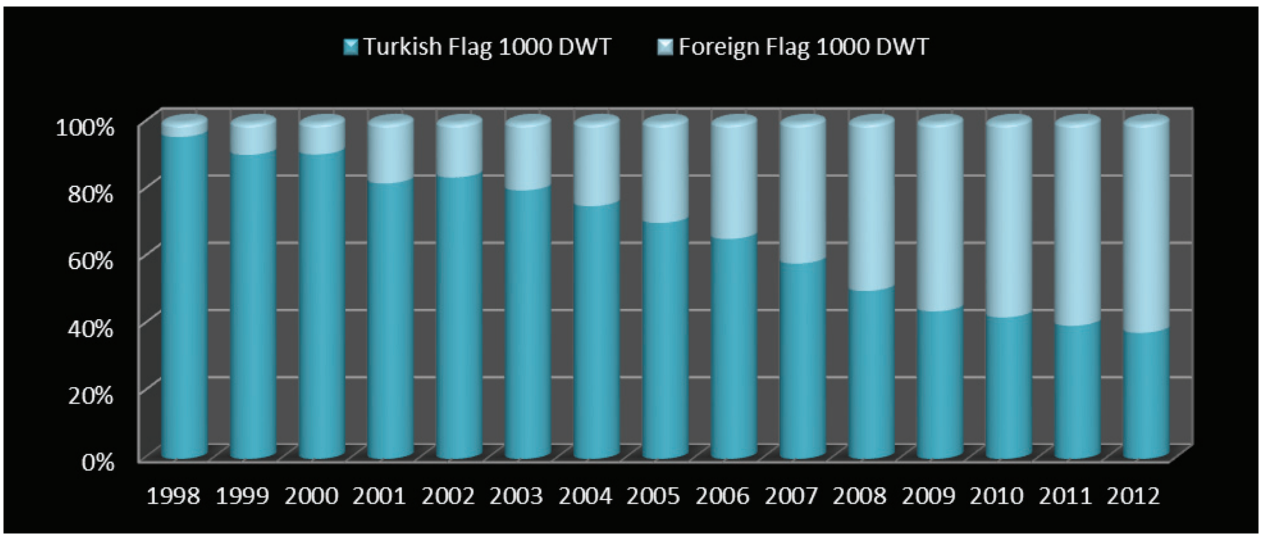


TABLE (20) : Total Fleet of the 30 countries by National and Foreign Flags

(01 January 2012) *(1000 GRT and over)*

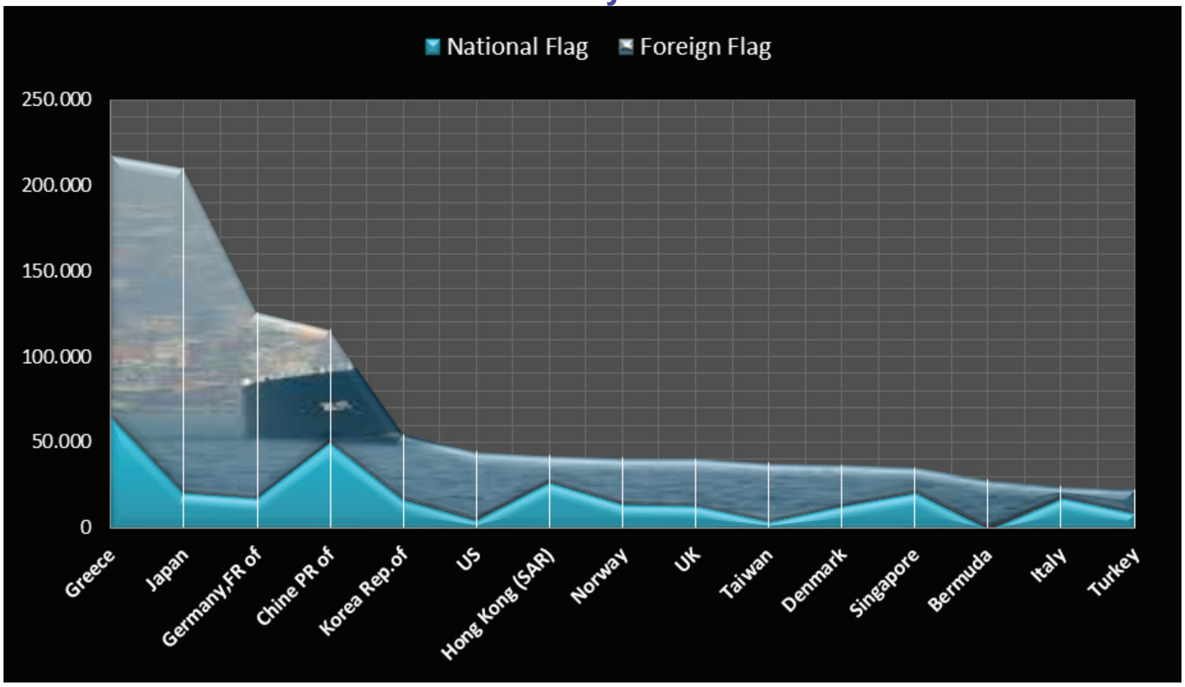
		National Flag				Foreign Flag				Total fleet controlled			
DWT rank	Country	No	1000 dwt	1000 TEU	Av. Age	No	1000 dwt	1000 TEU	Av. Age	No	1000 dwt	1000 TEU	Av. Age
1	Greece	737	64897	207	12,4	2477	152252	733	11,7	3214	217149	940	11,9
2	Japan	633	20761	11	12,1	3154	189006	1229	7	3787	209767	1241	7,9
3	Germany,FR of	390	17495	1248	11,8	3526	108001	4338	8,6	3916	125496	5586	8,9
4	Chine PR of	1702	50150	487	18,9	1450	65461	541	13,8	3152	115611	1028	16,6
5	Korea Rep.of	680	17343	75	16,4	471	37191	375	10,5	1151	54534	449	14
6	US	201	5141	147	23,9	794	39330	142	12,3	995	44471	289	14,6
7	Hong Kong (SAR)	433	26891	211	6,5	333	15542	40	13,3	766	42362	251	9,4
8	Norway	500	14361	63	14,5	949	26331	211	14,7	1449	40647	274	14,6
9	UK	330	13172	360	9	418	27108	363	14,3	748	40279	723	12
10	Taiwan	90	4214	54	16,2	573	33461	537	10,7	663	37676	591	11,4
11	Denmark	327	13069	591	11,1	581	23721	587	9,1	908	36790	1178	9,8
12	Singapore	534	20994	323	9,1	313	14159	86	17,8	847	35153	409	12,3
13	Bermuda	12	1234	-	8,3	323	26705	56	12,6	244	27939	56	12,3
14	Italy	553	18106	71	12,7	202	6309	41	11,6	755	24415	112	12,4
15	**Turkey**	**523**	**8479**	**76**	**16,5**	**642**	**14093**	**60**	**16,2**	**1165**	**22572**	**136**	**16,3**
16	India	294	14767	23	15,2	76	4625	6	12,7	370	19392	29	14,7
17	Russia	825	4486	48	28	410	15605	40	17,5	1235	19091	88	24,5
18	Canada	109	906	7	28,9	225	17596	333	11	334	18502	341	16,9
19	Belgium	65	5846	2	9,9	108	6741	32	10	173	12586	35	10
20	Saudi Arabia	53	1823	11	20	57	10510	0	9,1	110	12333	11	14,4
21	Malaysia	249	8288	60	15,1	75	4006	5	13,1	324	12294	64	14,7
22	Indonesia	890	9142	104	23,7	87	2439	11	10,7	977	11581	115	22,5
23	Brazil	74	2054	20	21,9	40	9270	-	14,6	114	11323	20	19,4
24	İran	44	438	7	16,6	69	10817	7	10,1	113	11255	15	12,6
25	France	116	3213	178	11,3	139	6878	459	10	255	10091	636	10,6
26	Netherlands	531	5052	189	9,5	194	3789	31	11,9	725	8840	221	10,1
27	UAE	35	276	1	14,8	241	8067	31	15,9	276	8342	32	15,8
28	Cyrprus	58	2060	11	10,4	146	4742	115	18,5	204	6802	126	16,2
29	Kuwait	35	3942	21	15,1	44	2736	105	12,3	79	6679	126	13,5
30	Viet Nam	441	4662	18	12,2	81	2006	8	23,1	522	6669	27	13,9
Total 30 Countries	Total 30 Countries	11464	363143	4625	15,8	18107	887496	10522	384,7	29571	1250639	15147	12,9
Other	Other	1903	25137	197	22,1	1899	52047	554	18,8	3802	77184	751	20,3
Subtotal	Subtotal	13367	388280	4822	16,7	20006	939544	11076	11,8	33373	1327824	15898	13,8
Unkonwn	Unkonwn	………	………	………	………	………	………	………	………	5751	126018	1756	20,6
World Total										**39124**	**1.453.842**	**17.654**	**14,8**

Source . ISL January/February 2012

Table 20 shows the first 30 countries which own the largest merchant fleet in the world scale. 86 % of the World fleet (**1000 Grt and over**) of 1.2 Million DWT, is being controlled by the following countries as of 01 January 2012.

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

GRAPH (14) : By Country of Domicile as of 1 January 2012



The World fleet (300 GRT and over) is 48.197 ships of 1.461.759.000 DWT based on 156 countries as of 01.01.2012. The position of Turkish merchant fleet is shown in the Table as being on 23rd place in World ranking

Panama, having a share of 21.9 % is in the first place, Liberia, having a share of 12.5 % is in the second place, Marshal Island, having a share of 7.9 % is in the third place.

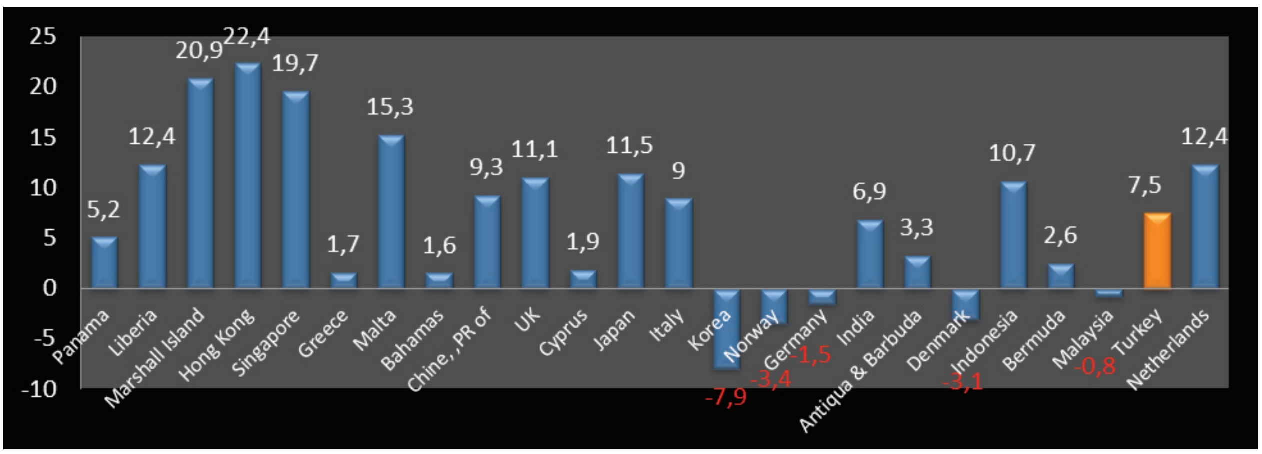
The Turkish fleet range among the World fleets between the years 2004 and 2012 is as follows :

- In 2004, the 23 rd
- In 2005, the 24 th
- In 2006, the 24 th
- In 2007, the 26 th
- In 2008, the 25 th
- In 2009, the 26 th
- In 2010, the 26 th
- In 2011, the 24 th
- In 2012, the 23 rd

TABLE (21): World Merchant Fleet Ranking by Flag as of January 1st,2012 (300 GRT and over)

DWT rank	Flag	No of	1.000	1.000	1.000	Dwt % share	% Change
2011	Flag	Ships	GRT	DWT	TEU	%	%
1	Panama	6741	208760	319704	3128	21.9	5.2
2	Liberia	2865	117076	182877	3558	12.5	12.4
3	Marshall Island	1677	71293	115864	722	7.9	20.9
4	Hong Kong	1805	67928	112801	1277	7.7	22.4
5	Singapore	1765	51443	78888	1037	5.4	19.7
6	Greece	1074	41199	72462	210	5.0	1.7
7	Malta	1693	43911	69848	491	4.8	15.3
8	Bahamas	1182	480953	62773	311	4.3	1.6
9	Chine, ,PR of	2590	35615	56131	518	3.8	9.3
10	UK	908	29363	39641	911	2.7	11.1
11	Cyprus	842	20715	32799	454	2.2	1.9
12	Japan	2367	16523	23188	16	1.6	11.5
13	Italy	824	18066	21271	142	1.5	9.0
14	Korea	1032	11501	18843	78	1.3	- 7.9
15	Norway	845	14354	18001	66	1.2	- 3.4
16	Germany	449	15266	17604	1252	1.2	- 1.5
17	India	456	8906	15361	27	1.1	6.9
18	Antiqua & Barbuda	1270	11080	14342	844	1.0	3.3
19	Denmark	447	11319	13708	608	0.9	- 3.1
20	Indonesia	2475	9046	12827	118	0.9	10.7
21	Bermuda	147	10606	10369	42	0.7	2.6
22	Malaysia	457	7095	9549	61	0.7	- 0.8
23	**Turkey**	**926**	**6198**	**9294**	**83**	**0.6**	**7.5**
24	Netherlands	676	7741	8699	297	0.6	12.4
25	France	219	6373	8198	178	0.6	1.2
World Total		48197	977932	1461759	17666	100	8.4

GRAPH (15) : World Merchant Fleet Ranking by Flag as of January (300 GRT/over) (01.01.2012)



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 22. Greece is in the first place being among the first three largest merchant fleets of the World. Southern Cyprus is in the second and Turkey is in the third place.

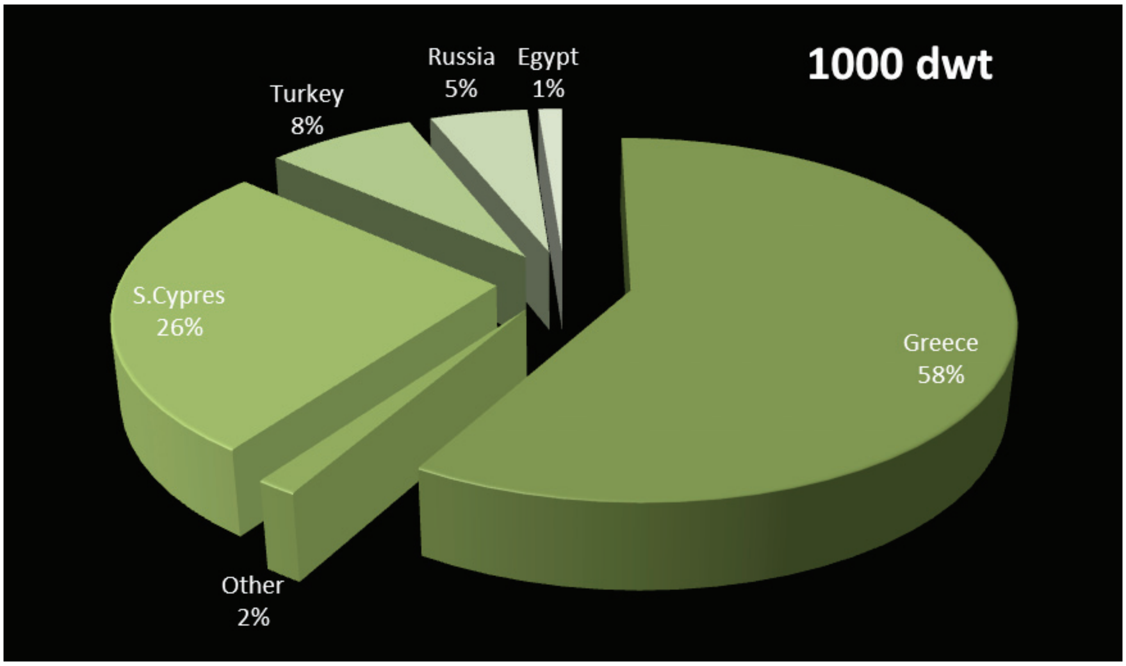
TABLE (22) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2012)

(300 grt and over)

World dwt rank	Country	No	1000 DWT	World Share %	Change Rate %
6	Greece	1074	72462	5,00%	1,7%
11	S.Cyprus	842	32799	2,20%	1.90%
23	Turkey	926	9294	0,60%	7,50%
30	Russia	1314	6124	0,40%	-1.60%
50	Egypt	95	1485	0,10%	2,30%
66	Iran	276	714	0,00%	-39,40%
75	Ukrania	158	529	0,00%	-21,70%
81	Bulgaria	36	420	0,00%	-32,00%
97	Syria	14	129	0,00%	-51,90%
110	Romania	12	44	0,00%	-72,60%
118	Iraq	2	27	0,00%	-

Source : ISL January-February 2012

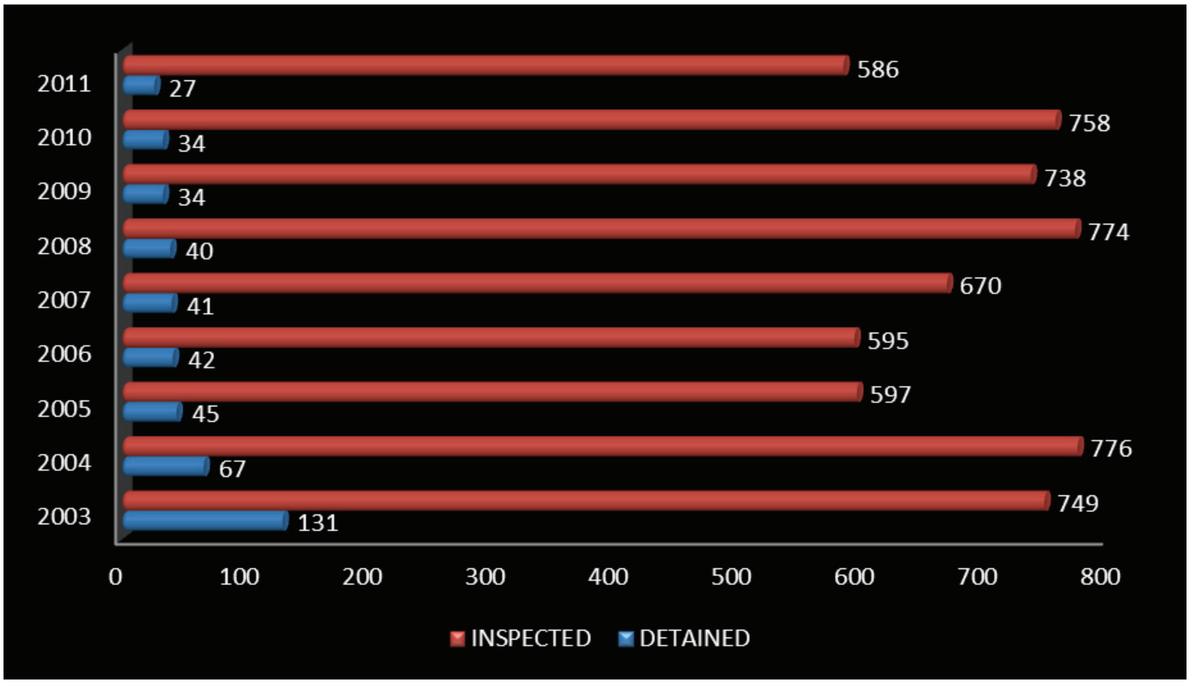
GRAPH (16) : Turkish Merchant Fleet and the Neighboring Countries (01.01 2012)



Port State Control Applications

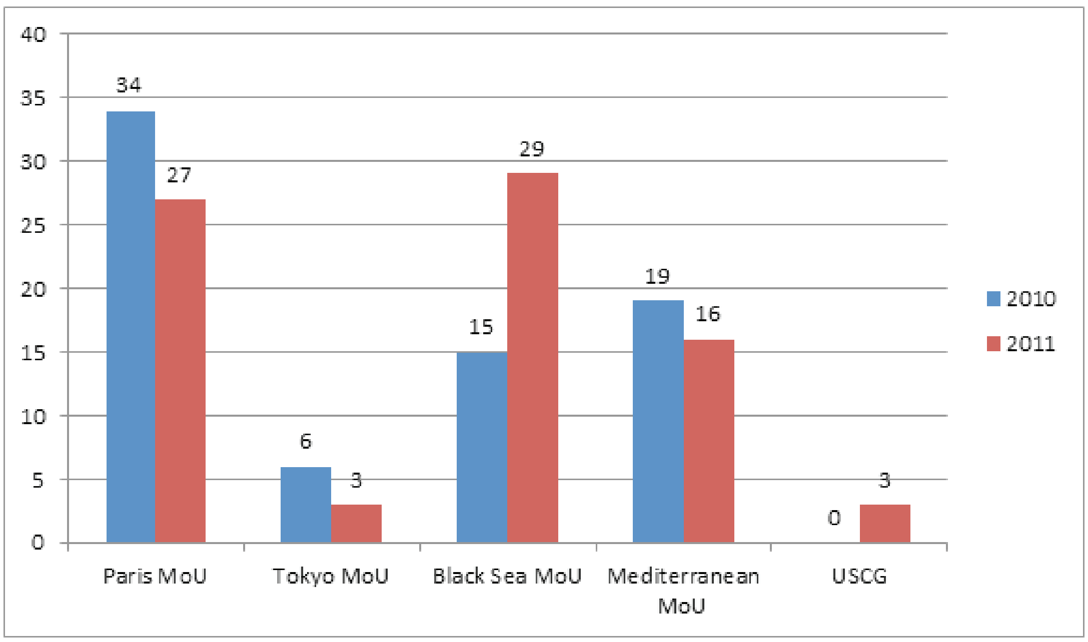
Turkey is in the White List.
Graph 17 shows monthly detention rates in Paris MoU in year 2011

GRAPH (17) : Inspected and Detained Ships by Years



Below there is the graph of comparative monthly detentions in the Tokyo, Mediterranean, Black Sea and Paris MoUs'. Total number of detentions of all 4 MoUs' is 74.

GRAPH (18) : Monthly Detention Rates in Tokyo, Mediterranean, Black Sea and Paris MoUs' in years 2010 and 2011



CARGOES

CHAPTER II

DEVELOPMENT OF TONNAGE CARRIED BY TURKISH MERCHANT FLEET IN 2011

The Developments in the Transportation of Foreign Trade Cargoes

85% of the Turkey's foreign trade is being realised by maritime transportation. The progress of transportation between the years of 2002-2011 is shown in the Table below by the modes of transportation.

TABLE (23) : Foreign Trade Transportation by Modes (%)

YEARS	SEA	RAIL	ROAD	AIR	OTHER
2002	87.3	0.7	9.7	0.2	2.1
2003	87.6	0.8	10.5	0.1	1.0
2004	87.4	1.2	10.3	0.1	1.0
2005	86.0	1.2	11.9	0.2	0.7
2006	87.4	1.1	10.4	0.1	1.0
2007	87.4	1.1	10.0	0.6	0.9
2008	86.5	1.1	10.7	0.7	1.0
2009	85	0.8	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

Source : Turkstat

85,8% of the volume of Turkey's foreign trade transportation has been carried by sea, 11,8% has been carried by road, 0,8% has been carried by rail, 0,4% has been carried by air, 1,2% has been carried by other transportation modes.

GRAPH (19) : Foreign Trade Transportation by Modes (%)

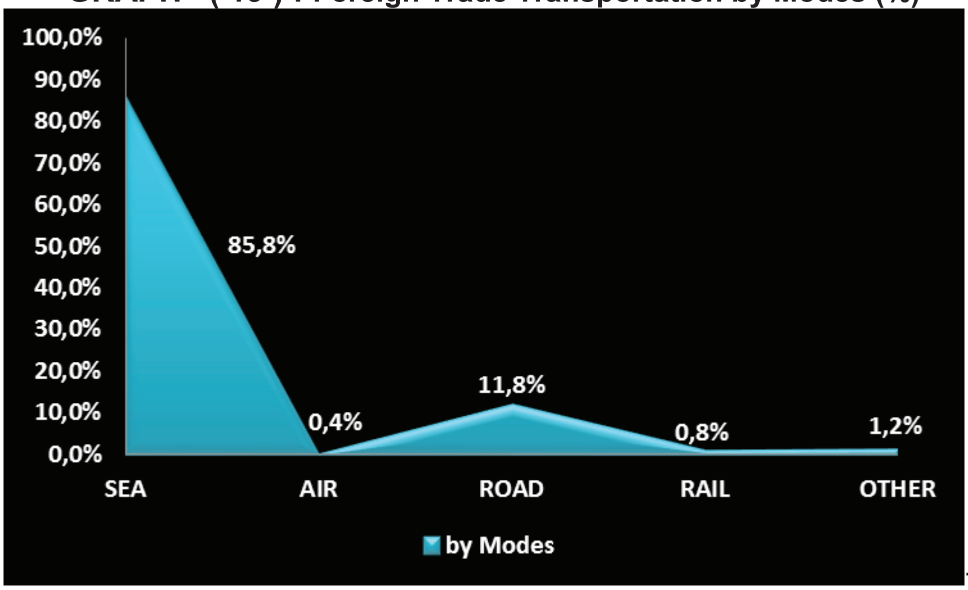


TABLE (24) : Foreign Trade Transportation by Modes ($)

By Modes	Import $ 2010	Import $ 2011	Export $ 2010	Export $ 2011	Foreign Trade $ 2010	Foreign Trade $ 2011	Change 2010-2011
Sea	112.567.878.944	133.434.323.795	58.753.413.786	73.621.892.205	171.321.292.730	207.056.216.000	20,85%
Rail	2.454.682.966	3.185.490.059	992.755.229	1.243.108.048	3.447.438.195	4.428.598.107	28,46%
Road	42.433.409.708	44.513.837.968	45.972.909.642	50.253.928.734	88.406.319.350	94.767.766.702	7,19%
Air	17.406.330.448	21.515.036.762	7.687.672.420	8.583.013.431	25.094.002.868	30.098.050.193	19,94%
Other	10.630.556.671	38.184.547.780	522.863.061	1.252.419.153	11.153.419.732	39.436.966.933	253,58%
Total	185.492.858.737	240.833.236.364	113.929.614.138	134.954.361.571	299.422.472.875	375.787.597.935	25,50%

Source : Turkstat

Developments in the Transportation of Seaborne Trade

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

The Number of Incoming Ships to the Turkish Ports

The number of incoming ships to the Turkish ports between the years 2010-2011 is shown below:

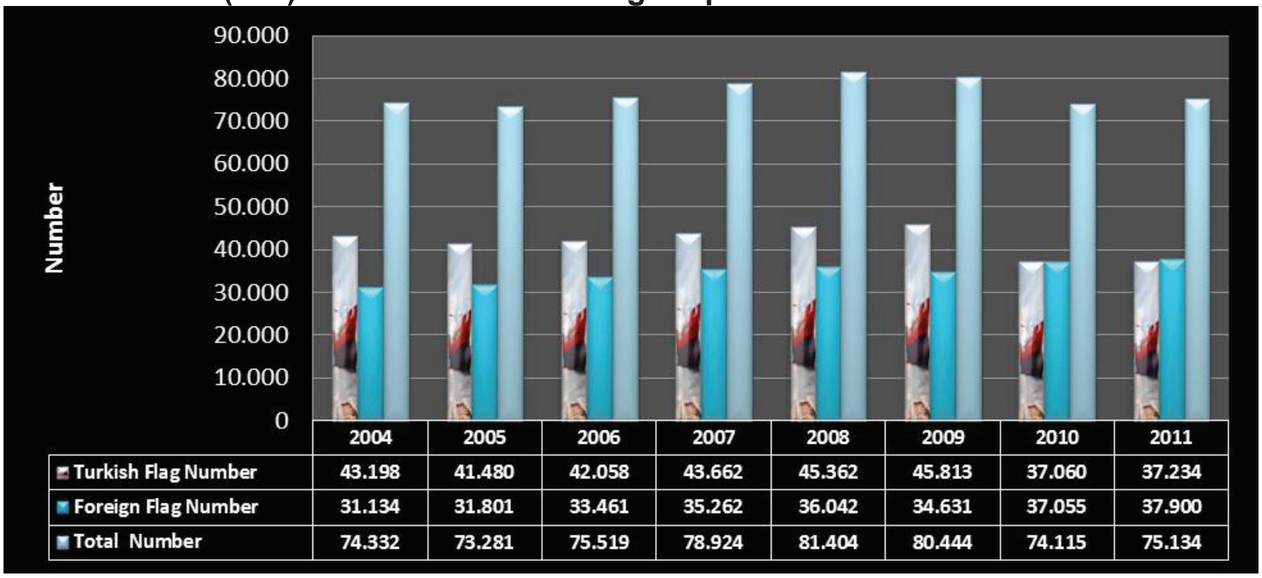
- In 2010, the number of incoming vessels decreased by 7.9% when compared with 2009.
- In 2011, the number of incoming vessels increased by 1.4% when compared with 2010,

TABLE (25): The Number of Incoming Ships to the Turkish Ports

	Turkish Flag	Foreign Flag	Total		
Years	Number	Number	Number	T/F %	F/F %
2004	43.198	31.134	74.332	58,11	41,89
2005	41.480	31.801	73.281	56,6	43,4
2006	42.058	33.461	75.519	55,69	44,31
2007	43.662	35.262	78.924	55,32	44,68
2008	45.362	36.042	81.404	55,72	44,28
2009	45.813	34.631	80.444	56,95	43,05
2010	37.060	37.055	74.115	50	50
2011	37.234	37.900	75.134	49,6	50,4

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

GRAPH (20): Numbers of Incoming Ships to the Turkish Ports



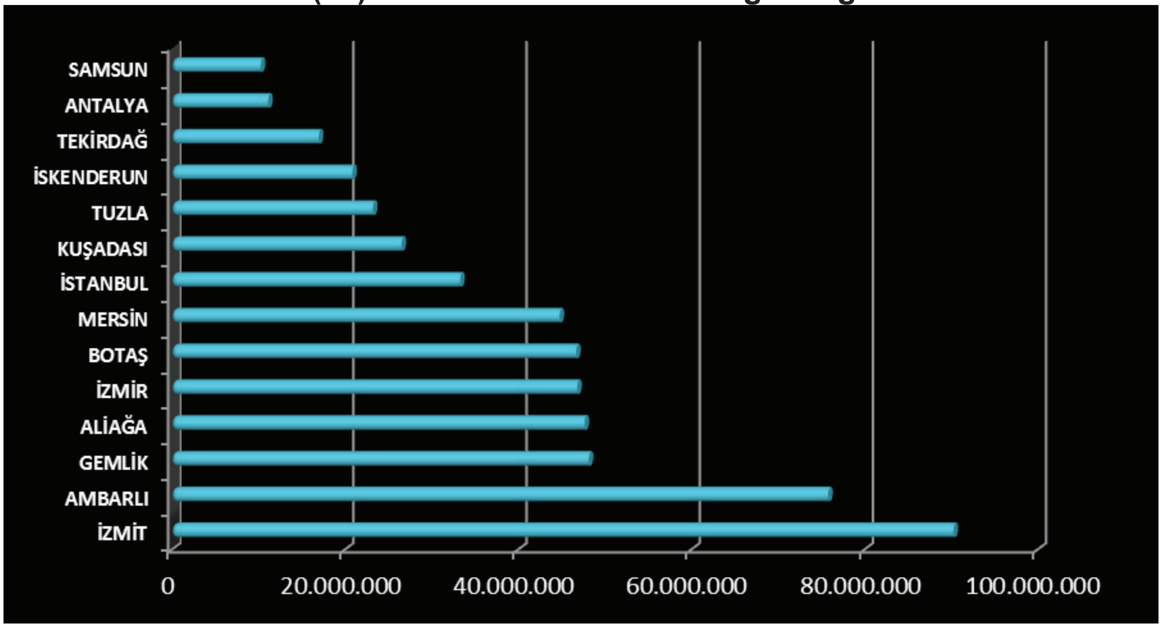
The number of incoming ships to the Turkish ports in monthly basis is shown in the Table 26.

Tablo (26): Numbers of Incoming Ships to the Turkish Ports in 2011

		Turkish Flag		Foreign Flag		Total	
Rank	**Port**	**Ship Number**	**GRT**	**Ship Number**	**GRT**	**Ship Number**	**GRT**
1	İZMİT	4.197	16.671.769	6.362	73.592.872	10.559	90.264.641
2	AMBARLI	2.716	16.814.871	2.420	58.974.441	5.136	75.789.312
3	GEMLİK	1.321	5.998.918	2.440	42.137.628	3.761	48.136.546
4	ALİAĞA	1.722	9.676.331	3.261	37.972.934	4.983	47.649.265
5	İZMİR	743	4.657.348	1.841	42.138.983	2.584	46.796.331
6	BOTAŞ	132	1.758.287	1.007	44.924.595	1.139	46.682.882
7	MERSİN	1.183	6.990.658	2.944	37.769.894	4.127	44.760.552
8	İSTANBUL	1.954	2.360.930	1.631	30.929.777	3.585	33.290.707
9	KUŞADASI	518	87.998	753	26.418.759	1.271	26.506.757
10	TUZLA	2.229	13.571.969	959	9.631.926	3.188	23.203.895
11	İSKENDERUN	1.707	3.312.578	1.880	17.521.857	3.587	20.834.435
12	TEKİRDAĞ	745	1.976.205	1.189	14.979.552	1.934	16.955.757
13	ANTALYA	457	886.754	906	10.220.348	1.363	11.107.102
14	SAMSUN	889	2.440.598	1.639	7.812.284	2.528	10.252.882
	Other	16.721	18.655.704	8.668	46.287.074	25.389	64.942.778
	TOPLAM	**37.234**	**105.860.916**	**37.900**	**501.312.925**	**75.134**	**607.173.842**

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

Grafik (21): Annual Turkish / Foreign Flag Rates



Cabotage Transportation

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

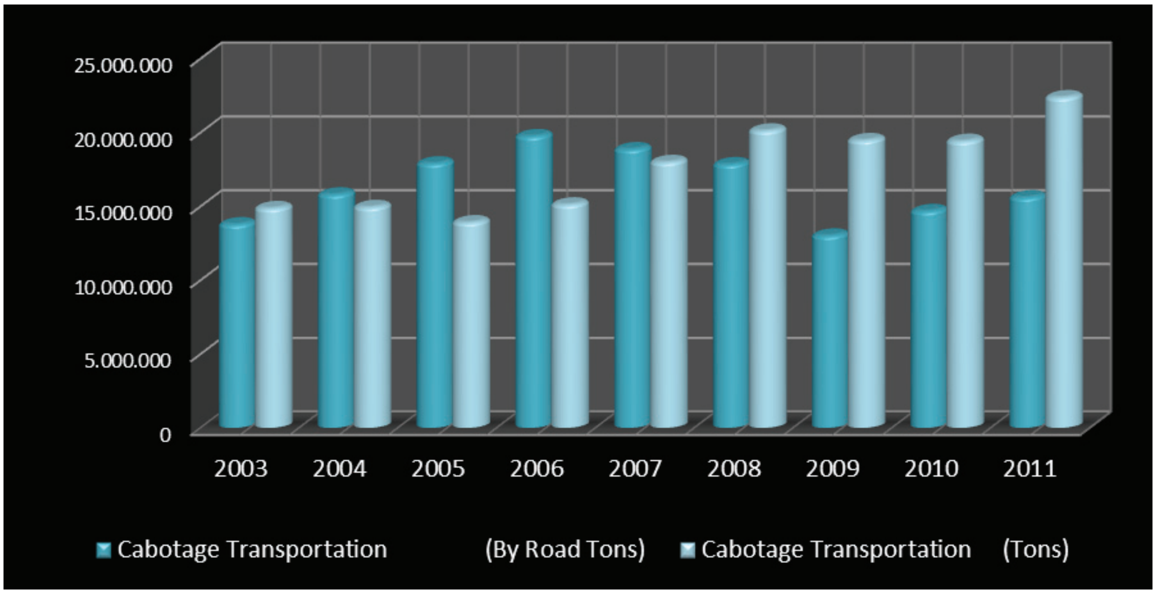
The amounts of cargoes carried by Ferries and carried as bulk and partial cargoes between 2003- 2011 in Turkish ports and wharves on ton basis are at Table 27.

TABLE (27) : 2003-2011 Cabotage Transportation

	Cabotage Transportation	Cabotage Transportation	Total Cabotage	Change
Years	**(By Road Tons)**	**(Tons)**	**(Tons)**	**%**
2003	13.787.137	14.884.389	28.671.526	-
2004	15.810.494	14.958.778	30.769.272	7,3
2005	17.911.082	13.922.865	31.833.947	3,5
2006	19.756.679	15.133.337	34.890.016	9,6
2007	18.873.278	18.004.619	36.877.897	5,7
2008	17.856.494	20.136.037	37.992.531	3
2009	13.027.429	19.485.900	32.513.329	-14,4
2010	14.686.657	19.434.485	34.121.142	4,9
2011	15.612.213	22.389.570	38.001.783	11,4

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

GRAPH (22) : 2003-2011 Cabotage Transportation



The total cabotage transportation in 2011 is 38.001.783 tons; 15.612.213 tons is carried by Ferries and 22.389.570 tons is carried as bulk and partial cargoes (Table 27). The cabotage transportation increased about 32,5% between the years 2003-2011.

TABLE (28) 2011 –Cabotage Transportation by the Types of Cargoes

By Types	Amount (tons)	Share of total %
Diesel Oil	3.451.565	15,42%
Crude Oil	1.765.713	7,89%
Jet Fuel	1.529.146	6,83%
Portdland Cement	1.281.500	5,72%
Roll Sheet Iron	1.236.849	5,52%
Sand	980.073	4,38%
Iron	832.176	3,72%
Benzoline	821.427	3,67%
Structural Iron	762.334	3,40%
Container (20 full)	689.078	3,08%
Fuel Oil	652.540	2,91%
Cinder	619.424	2,77%
Other Cement	614.566	2,74%
Slap	577.174	2,58%
Steel Billets	523.640	2,34%
Coke	519.139	2,32%
Clay	495.348	2,21%
Scrap Iron	459.580	2,05%
Container (40 full)	420.898	1,88%
Container (20 emply)	347.425	1,55%
Other	3.809.975	17,02%
Total	22.389.570	100,00%

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

The most significant increase in cabotage transportation is seen in 2006 by 9.6%, the increase in 2004 and 2011 is 7,3% and 11,4% respectively.

Table 28 shows the cabotage transportation by types of cargoes. The first three cargoes are liquid cargoes; diesel oil (15,42%), crude oil (7,89%) and jet fuel (6,83%).

TABLE (29) : 2011 Cabotage Transportation in Ports

Rank	Port Authority	Loading	Unloading	Total
1	İZMİT	4.548.283	2.559.987	7.108.270
2	AMBARLI	930.613	4.308.077	5.238.690
3	ALİAĞA	2.626.308	2.271.030	4.897.338
4	İSKENDERUN	2.847.869	777.309	3.625.178
5	KDZ EREĞLİ	989.407	2.069.621	3.059.028
6	BOTAŞ	1.787.900	4.150	1.792.050
7	KARABİGA	923.717	797.421	1.721.138
8	TUZLA	470.271	1.091.498	1.561.769
9	ÇANAKKALE	1.377.150	125.391	1.502.541
10	MERSİN	453.339	981.167	1.434.506
11	SAMSUN	283.990	944.765	1.228.755
12	İSTANBUL	165.712	936.385	1.102.097
13	TEKİRDAĞ	417.739	658.916	1.076.655
14	GEMLİK	356.054	692.358	1.048.412
15	ANTALYA	36.000	792.580	828.580
16	TRABZON	379.533	410.248	789.781
17	ÜNYE	606.063	172.370	778.433
18	RİZE	17.147	730.020	747.167
19	MARMARA A.	574.365	1.602	575.967
20	İZMİR	106.525	419.216	525.741
21	BANDIRMA	274.521	151.745	426.266
22	TİREBOLU	1.772	349.085	350.857
23	BARTIN	142.808	189.510	332.318
24	YALOVA	45	307.620	307.665
25	ZONGULDAK	171.155	99.261	270.416
26	SİLİVRİ	106.120	112.200	218.320
27	İNEBOLU	200.732	13.534	214.266
28	AMASRA	196.980	900	197.880
29	HOPA	105.650	60.659	166.309
30	GÜLLÜK	149.725	3.150	152.875
31	GÖCEK	0	89.246	89.246
32	FATSA	0	68.760	68.760
33	ERDEK	0	40.053	40.053
34	MARMARİS	0	35.200	35.200
35	ORDU	0	31.820	31.820
36	GİRESUN	4.125	20.945	25.070
37	ÇEŞME	0	24.764	24.764
38	GELİBOLU	0	14.291	14.291
39	DİKİLİ	4.925	9.152	14.077
40	MUDANYA	650	10.902	11.552
41	FETHİYE	0	5.150	5.150
42	VAKFIKEBİR	0	3.000	3.000
43	FOÇA	0	1.550	1.550
44	BOZCAADA	0	1.108	1.108
45	KUŞADASI	0	1.046	1.046
46	ŞİLE	0	480	480
47	BODRUM	0	328	328
	TOTAL	**21.257.193**	**22.389.570**	**43.646.763**

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

In cabotage handling in 2011, İzmit Port (16.3%), Ambarlı Port (12%) and Aliağa Port (11.2%) took the first three place. In cabotage loading, İzmit Port (21.4%), Aliağa Port (12.3%) and İskenderun Port (13.4%) are on the first three places, while in cabotage unloading Ambarlı Port (19.2%), İzmit Port (11.4%) and Aliağa Port (10.1%) are on the top of the list.

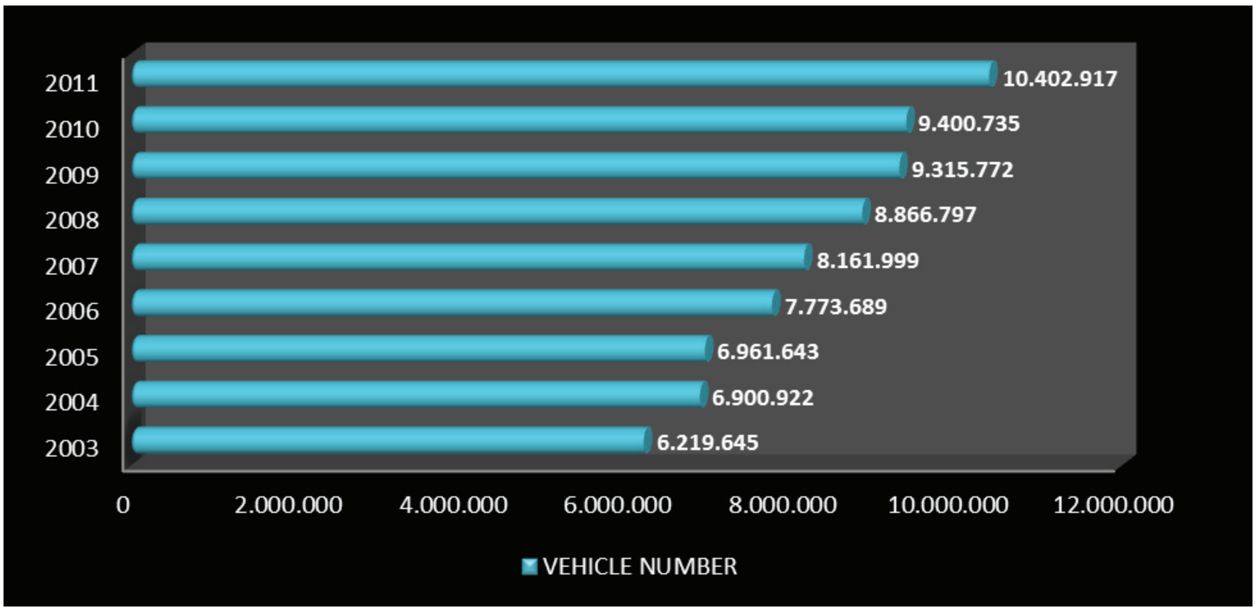
In table 30, the changes in transportation of vehicles in cabotage between the years 2003 and 2011 are being shown. The most significant increase is seen in 2006; with an increase of 11.7% in vehicle numbers and an increase of 22.9% in vehicle / mile. The number of vehicles increased 67.2% in total between 2003 and 2010.

TABLE (30): 2003-2011 Cabotage Transportation Vehicle Number

Years	VEHICLE NUMBER	CHANGE %	VEHICLE NumberXMile	CHANGE %
2003	6.219.645	-	35.880.927	-
2004	6.900.922	10,9	40.835.592	13,8
2005	6.961.643	0,9	42.294.836	3,6
2006	7.773.689	11,7	51.978.669	22,9
2007	8.161.999	5	59.942.527	15,3
2008	8.866.797	8,6	82.950.808	38,4
2009	9.315.772	5,1	82.580.396	-0,4
2010	9.400.735	0,9	83.607.444	1,2
2011	10.402.917	10,7	83.283.519	-0,4

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

GRAPH (23) : 2003-2011 Cabotage Transportation Vehicle Number



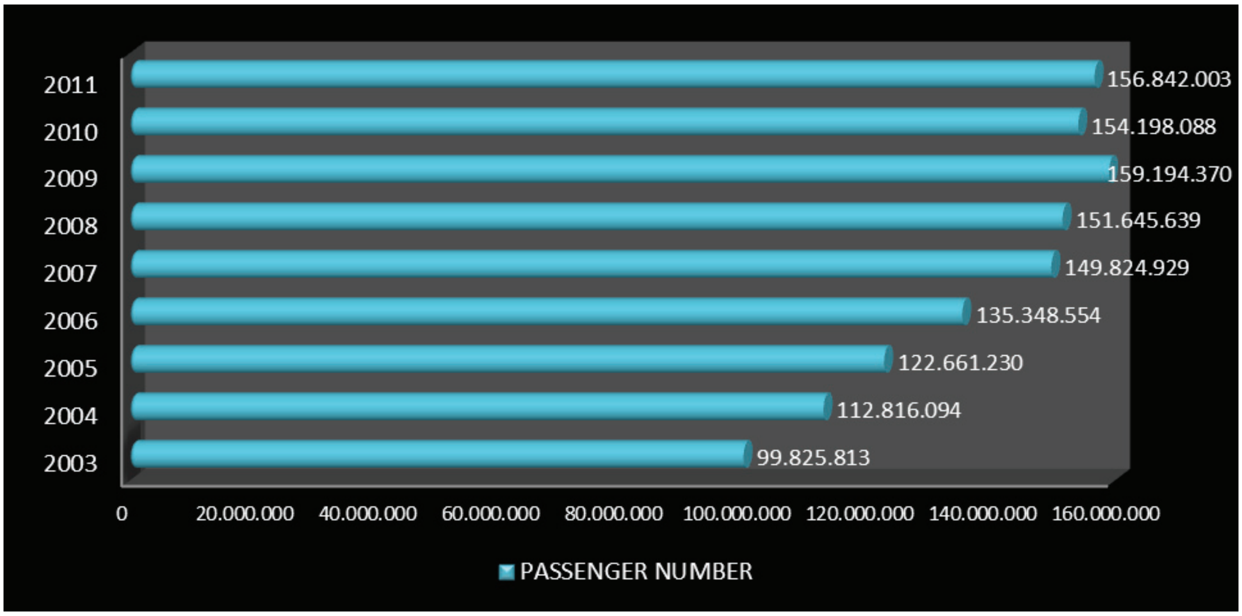
The Table about the numbers of passengers carried in cabotage transportation shows that the biggest increase was in 2004 with 13% and then, in 2007 the increase became 10.7%. In the years 2003-2011 an increase of 57.1 % in passengers' number was realized.

TABLE (31) : 2003-2011 Cabotage Transportation Passenger Number

Years	PASSENGER NUMBER	CHANGE %	VEHICLE NumberXMile	CHANGE %
2003	99.825.813	-	550.524.602	-
2004	112.816.094	13	621.484.444	12,9
2005	122.661.230	8,7	670.751.087	7,9
2006	135.348.554	10,3	752.889.731	12,2
2007	149.824.929	10,7	842.975.355	12
2008	151.645.639	1,2	847.917.253	0,6
2009	159.194.370	5	886.609.389	4,6
2010	154.198.088	-3,1	847.715.977	-4,4
2011	156.842.003	1,7	854.909.150	0,8

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

GRAPH (24) : 2003-2010 Cabotage Transportation Passenger Number



Developments in International Sea Transportation

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

TABLE (32) : Development of the Seaborne Trade (2002-2011) Tons

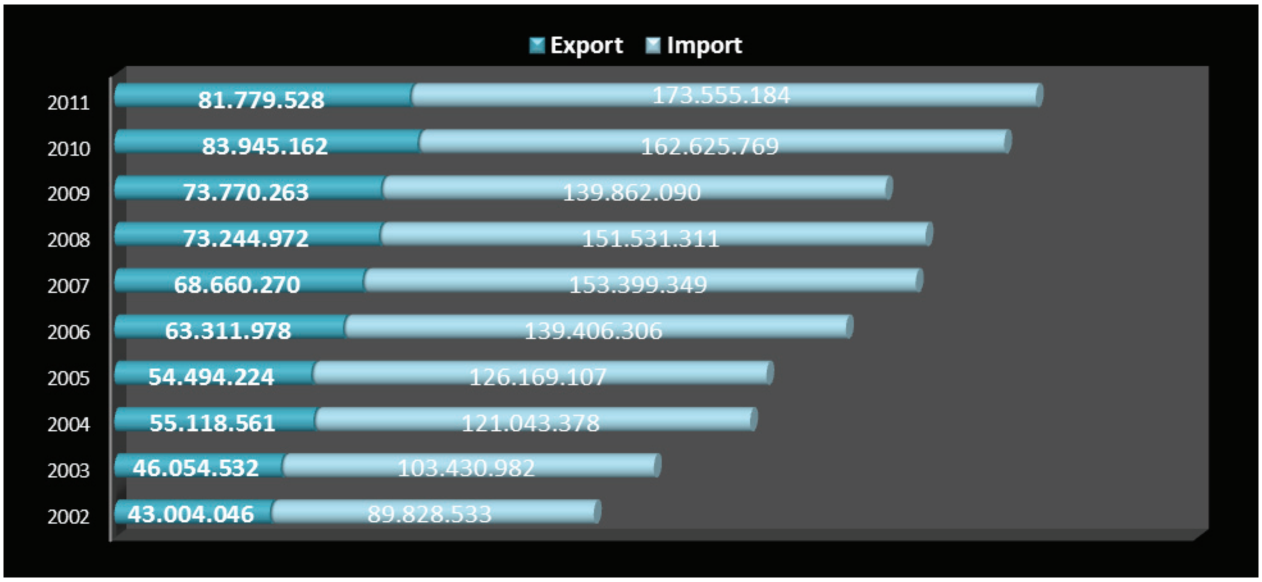
Years	Total	Export	Import	Turkish Flag	TF %	FF %
2002	132.832.579	43.004.046	89.828.533	44.167.451	33	67
2003	149.485.514	46.054.532	103.430.982	43.680.964	29	71
2004	176.161.939	55.118.561	121.043.378	41.905.941	24	76
2005	180.663.331	54.494.224	126.169.107	42.874.811	24	76
2006	202.718.284	63.311.978	139.406.306	42.615.725	21	79
2007	222.059.619	68.660.270	153.399.349	36.992.141	17	83
2008	224.776.283	73.244.972	151.531.311	31.791.383	14	86
2009	213.632.353	73.770.263	139.862.090	29.965.566	14	86
2010	246.570.931	83.945.162	162.625.769	40.494.118	16	84
2011	255.334.712	81.779.528	173.555.184	42.396.010	17	83

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

In 2011 export shipments decreased to 81.7 million tons, import shipments increased to 173.5 million tons when compared with the previous year. The share of Turkish flag vessels transporting foreign trade cargoes have been realized as 17 % on the average.

As a whole, the share of the Turkish flag vessels transporting foreign trade cargoes between 2002-2011 have been realized as 20.9 % on the average.

GRAPH (25): Development of the Seaborne Trade (Tons)



The transportation of foreign trade cargoes; 17 % of the import transportation totalling **173.5** million tons have been carried by Turkish flag vessels. 15 % of the export transportation totalling 81.7 million tons have been carried by Turkish flag vessels.

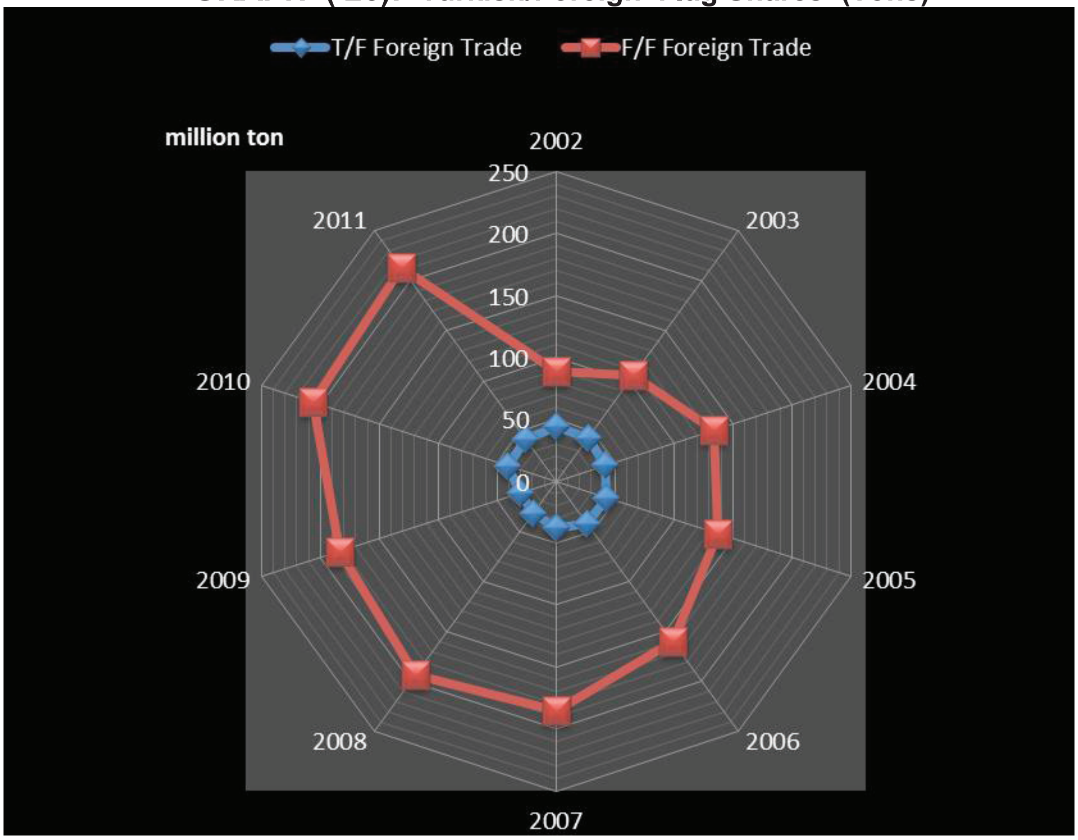
TABLE (33) : Foreign Trade Transportation by Flags

	Turkish Flag				Foreign Flag				Total	
Years	**T/F Import**	**%**	**T/F Export**	**%**	**F/F Import**	**%**	**F/F Export**	**%**	**T/F Foreign Trade**	**F/F Foreign Trade**
2002	30.562.121	34	13.605.330	32	59.266.412	66	29.398.716	68	44.167.451	88.665.128
2003	30.864.219	30	12.816.745	28	72.566.763	70	33.237.787	72	43.680.964	105.804.550
2004	29.240.528	24	12.665.413	23	91.802.850	76	42.453.148	77	41.905.941	134.255.998
2005	31.577.200	25	11.297.612	21	94.591.907	75	43.196.613	79	42.874.812	137.788.520
2006	32.794.143	24	9.821.582	16	106.612.163	76	53.490.396	84	42.615.725	160.102.559
2007	27.187.904	18	9.804.237	14	126.211.445	82	58.856.033	86	36.992.141	185.067.478
2008	21.136.641	14	10.654.742	15	130.394.670	86	62.590.230	85	31.791.383	192.984.900
2009	20.387.046	15	9.578.520	13	119.475.045	85	64.191.743	87	29.965.566	183.666.788
2010	28.878.432	18	11.615.686	14	133.747.337	82	72.329.476	86	40.494.118	206.076.813
2011	30.122.065	17	12.273.945	15	143.433.119	83	69.505.583	85	42.396.010	212.938.702

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

The transportation of seaborne foreign trade cargoes increased to 255.3 million tons when compared with 2011 (89 million tons). Import goods increased to 173.5 million tons, (43 million tones) export goods increased to 81 million tons when compared with 2002 with the same period.

GRAPH (26): Turkish/Foreign Flag Shares (Tons)



The share of Turkish flag vessels, in total foreign trade transportation, in export basis increased to 12.3 million tons and in Import basis increased to 30.1 million tons in 2011.

The share of Foreign flag vessels, in total foreign trade transportation, in export basis increased to 69.5 million tons and in Import basis increased to 143.4 million tons in 2011, when compared with 29.4 and 59,3 million tons in 2002.

The share of Turkish flag ships, in total export transportations increased 5,6 %, import transportations increased 4.3 % in 2011 when compared with previous year.

GRAPH (27) : Turkish /Foreign Flag Shares

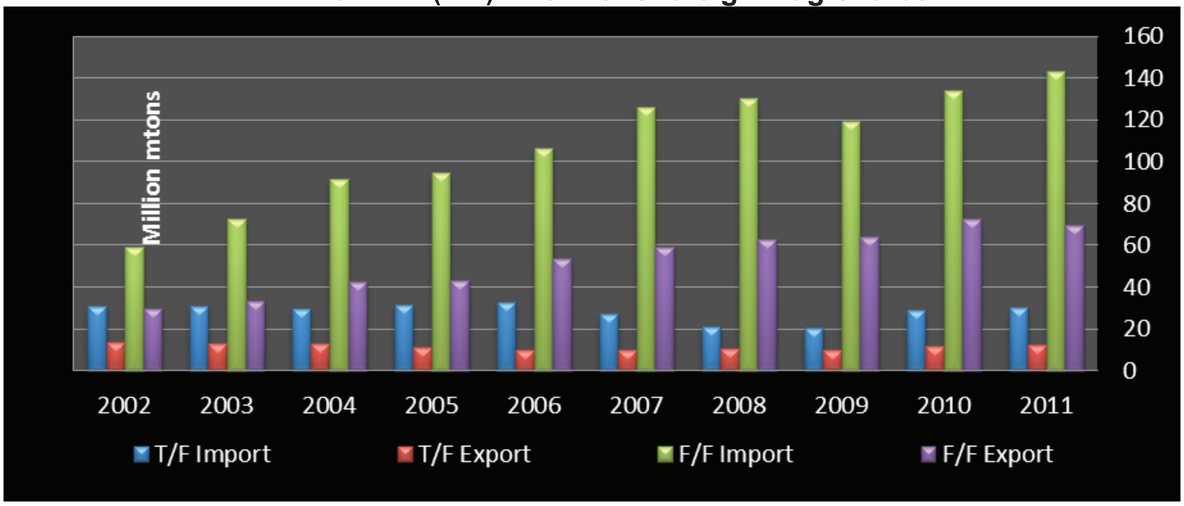


TABLE (34) : In Seaborne Exportation, Transportations Made by the Foreign Flag Ships to Their Own Countries, In Quantity / In Value (The first 25 Flags)

2011 Rank		Flag	mtons	$
1	Other Country	Panama	21.468.499	17.871.053.105
	Home Land Des.	Panama	5.015	2.259.480
		Total Panama	**21.473.514**	**17.873.312.585**
2	Other Country	Malta	14.096.880	9.790.674.415
	Home Land Des	Malta	61.389	43.404.532
		Total Malta	**14.158.269**	**9.834.078.947**
3	Other Country	Liberia	11.652.651	13.321.616.226
	Home Land Des	Liberia	112	512.117
		Total Liberia	**11.652.763**	**13.322.128.343**
4	Other Country	Countries terrilorities not determined	5.697.745	6.481.217.850
	Home Land Des	Countries terrilorities not determined	16	37.600
		Total Countries terrilorities not determined	**5.697.761**	**6.481.255.450**
5	Other Country	Marshall Island	5.580.287	4.524.654.877
	Home Land Des	Marshall Island	0	0
		Total Marshall Island	**5.580.287**	**4.524.654.877**
6	Other Country	Russia	827.594	509.339.665
	Home Land Des	Russia	4.261.665	1.438.476.630
		Total Russia	**5.089.259**	**1.947.816.295**
7	Other Country	Italy	2.664.039	4.159.084.556
	Home Land Des	Italy	1.294.807	1.590.629.943
		Total Italy	**3.958.846**	**5.749.714.499**
8	Other Country	Greece	3.002.642	1.925.167.201
	Home Land Des	Greece	469.701	453.400.262
		Total Greece	**3.472.343**	**2.378.567.463**

9	Other Country	Hong Kong	3.328.296	1.641.649.274
	Home Land Des	Hong Kong	1.010	8.467.755
		Total Hong Kong	**3.329.306**	**1.650.117.029**
10	Other Country	Antigua & Barbuda	2.858.456	4.905.420.656
	Home Land Des	Antigua & Barbuda	0	0
		Total Antigua & Barbuda	**2.858.456**	**4.905.420.656**
11	Other Country	Cambodia	2.512.956	667.911.629
	Home Land Des	Cambodia	10.254	3.436.232
		Total Cambodia	**2.523.210**	**671.347.861**
12	Other Country	Colombia	145.743	234.825
	Home Land Des	Colombia	2.219.774	370.631
		Total Colombia	**2.365.517**	**605.456**
13	Other Country	England	1.964.477	2.541.080.212
	Home Land Des	England	331.401	267.590.624
		Total England	**2.295.878**	**2.808.670.836**
14	Other Country	Comoro	1.960.740	454.001.507
	Home Land Des	Comoro	5.959	2.343.700
		Total Comoro	**1.966.699**	**456.345.207**
15	Other Country	Norway	1.788.636	622.024.586
	Home Land Des	Norway	2.876	5.226.418
		Total Norway	**1.791.512**	**627.251.004**
16	Other Country	Georgia	1.662.824	707.099.375
	Home Land Des	Georgia	57.156	26.281.082
		Total Georgia	**1.719.980**	**733.380.457**
17	Other Country	Ukrania	705.048	249.137.008
	Home Land Des	Ukrania	996.186	437.266.909
		Total Ukrania	**1.701.234**	**686.403.917**
18	Other Country	Singapore	1.635.865	2.015.719.974
	Home Land Des	Singapore	6.298	14.865.898
		Total Singapore	**1.642.163**	**2.030.585.872**
19	Other Country	St.Kitts ve Nevis	1.522.163	363.080.586
	Home Land Des	St.Kitts ve Nevis	0	0
		Total St.Kitts ve Nevis	**1.522.163**	**363.080.586**
20	Other Country	Bahama	1.497.845	1.347.878.200
	Home Land Des	Bahama	2.775	999.000
		Total Bahama	**1.500.620**	**1.348.877.200**
21	Other Country	Moldova	1.432.223	451.986.410
	Home Land Des	Moldova	21.619	10.650.190
		Total Moldova	**1.453.842**	**462.636.600**
22	Other Country	U.S	163.928	244.054.558
	Home Land Des.	U.S.	1.129.073	390.336.350
		Total U.S.	**1.293.001**	**634.390.908**
23	Other Country	St Vincent	1.244.418	433.098.326
	Home Land Des	St Vincent	3.737	1.251.333
		Total St Vincent	**1.248.155**	**434.349.659**
24	Other Country	Brazil	554	2.586.405
	Home Land Des	Brazil	1.118.486	222.466.058
		Total Brazil	**1.119.040**	**225.052.463**
25	Other Country	Holland	731.293	789.656.178
	Home Land Des	Holland	281.690	203.800.382
		Total Holland	**1.012.983**	**993.456.560**

Source: Turkstat

In quantities, except the container transportations, within the maritime transportation of Turkey’s exports goods in 2011, Panama Flag Vessels carried 21.5 million tons, Malta Flag Vessels carried 14.1 million tons of cargoes and the Liberia Flag Vessels carried 11.6 million tons of cargoes .

TABLE (35) : In Seaborne Importation, Transportations Made by the Foreign Flag Ships to Their Own Countries, In Quantity,In Volume (The first 25 Flags)

2011 Rank		Flag	mtons	$
1	Other Country	Panama	13.886.371	12.506.022.921
	Home Land Des.	Panama	12.308	17.222.344
		Total Panama	**13.898.679**	**12.523.245.265**
2	Other Country	Liberia	5.590.876	5.767.167.518
	Home Land Des	Liberia	9.281	12.609.017
		Total Liberia	**5.600.157**	**5.779.776.535**
3	Other Country	Countries terrilorities not determined	5.334.904	4.479.356.816
	Home Land Des	Countries terrilorities not determined	534	960.147
		Total Countries terrilorities not determined	**5.335.438**	**4.480.316.963**
4	Other Country	Malta	4.564.885	5.149.308.795
	Home Land Des	Malta	178.771	141.075.487
		Total Malta	**4.743.656**	**5.290.384.282**
5	Other Country	Marshall Island	3.664.917	4.003.828.914
	Home Land Des	Marshall Island	2.930	17.887.981
		Total Marshall Island	**3.667.847**	**4.021.716.895**
6	Other Country	Antigua & Barbuda	2.604.169	1.991.917.523
	Home Land Des	Antigua & Barbuda	744	1.119.834
		Total Antigua & Barbuda	**2.604.913**	**1.993.037.357**
7	Other Country	Italy	793.531	3.187.762.106
	Home Land Des	Italy	470.810	1.457.058.951
		Total Italy	**1.264.341**	**4.644.821.057**
8	Other Country	Holland	1.034.669	371.736.447
	Home Land Des	Holland	65.819	23.641.917
		Total Holland	**1.100.488**	**395.378.364**
9	Other Country	Hong Kong	1.049.925	767.844.165
	Home Land Des	Hong Kong	46.095	40.038.998
		Total Hong Kong	**1.096.020**	**807.883.163**
10	Other Country	Russia	305.046	136.902.619
	Home Land Des	Russia	785.628	235.079.482
		Total Russia	**1.090.674**	**371.982.101**
11	Other Country	Germany	1.012.102	942.375.003
	Home Land Des	Germany	74.003	117.271.861
		Total Germany	**1.086.105**	**1.059.646.864**
12	Other Country	Moldova	907.538	316.012.826
	Home Land Des	Moldova	1.055	1.352.276
		Total Moldova	**908.593**	**317.365.102**
13	Other Country	Georgia	827.881	331.510.808
	Home Land Des	Georgia	29.783	4.648.359
		Total Georgia	**857.664**	**336.159.167**
14	Other Country	England	710.926	741.183.040
	Home Land Des	England	136.727	241.236.197
		Total England	**847.653**	**982.419.237**

15	Other Country	St Vincent	834.755	294.727.689
	Home Land Des	St Vincent	1.239	1.717.316
		Total St Vincent	**835.994**	**296.445.005**
16	Other Country	Greece	672.321	437.191.423
	Home Land Des	Greece	162.722	49.747.129
		Total Greece	**835.043**	**486.938.552**
17	Other Country	Singapore	714.531	1.080.046.046
	Home Land Des	Singapore	69.539	42.982.712
		Total Singapore	**784.070**	**1.123.028.758**
18	Other Country	Cambodia	773.833	153.905.517
	Home Land Des	Cambodia	1.800	1.087.631
		Total Cambodia	**775.633**	**154.993.148**
19	Other Country	Tanzaia	560.151	130.465.475
	Home Land Des	Tanzaia	496	375.169
		Total Tanzaia	**560.647**	**130.840.644**
20	Other Country	Bahama	545.855	751.527.615
	Home Land Des	Bahama	1.202	3.491.691
		Total Bahama	**547.057**	**755.019.306**
21	Other Country	Sierra Leone	445.299	99.092.781
	Home Land Des	Sierra Leone	417	587.107
		Total Sierra Leone	**445.716**	**99.679.888**
22	Other Country	Denmark	426.815	342.852.408
	Home Land Des.	Denmark	10.991	6.341.748
		Total Denmark	**437.806**	**349.194.156**
23	Other Country	Comoro	386.793	86.501.783
	Home Land Des	Comoro	345	719.938
		Total Comoro	**387.138**	**87.221.721**
24	Other Country	Togo	352.675	59.624.955
	Home Land Des	Togo	153	313.532
		Total Togo	**352.828**	**59.938.487**
25	Other Country	Belize	296.898	101.599.327
	Home Land Des	Belize	815	2.247.845
		Total Belize	**297.713**	**103.847.172**

Source: Turkstat

Turkey's exports cargoes carried by sea way in the year 2011, the value of Panama Flag Vessels carried cargoes is 17.8 billion US Dollars, Liberia Flag Vessels carried cargoes is 13.3 billion US Dollars, and the Malta Flag Vessels carried cargoes is 9,8 billion US Dollars.

In quantities, except the container transportations, within the maritime transportation of Turkey's import goods in 2011, Panama Flag Vessels carried 13.8 million tons, Liberia Flag Vessels carried 5.6 million tons and the Countries territories not determined Flag Vessels carried 5.3 million tons of cargoes .

In the year 2011, as regards Turkey's imports transportations,the value of Panama Flag Vessels carried cargoes is 12.5 billion US Dollars, Liberia Flag Vessels is 5.8 billion US Dollars and Malta Flag Vessels is 5.2 billion US Dollars.

Development in Foreign Trade Transportation by Types of Cargoes

The foreign trade cargoes transported by vessels of Turkey according to the types of cargoes are shown in the Table 36 and 37.

The major segments of the exports goods in 2011, which realized totally as 81.7 million tons are 19,39 % Container (20 full), 15.50 % Container (40 full) and 7.60 % Portland Cement. Major segments of the imported goods in 2011, which realized totally as 173 million tons are 12.23 % Scrap Iron, 10.16 % Mineral Coal and 9,01 % Container (40 full).

TABLE (36) : Export by the Types of Cargoes 2011

Rank	Cargo List	Export mtons	%
1	Container (20 full)	15.855.062	19,39
2	Container (40 full)	12.675.328	15,50
3	Portland Cement	6.214.560	7,60
4	Structural Iron	5.642.945	6,90
5	Fuel Oil	5.294.876	6,47
6	Feldspar	3.843.605	4,70
7	Articulate Lorry	3.695.449	4,52
8	Benzoline	2.316.644	2,83
9	Billet	2.251.024	2,75
10	Clinder	2.249.015	2,75
11	Roll Sheet Iron	1.675.334	2,05
12	Iron Pipe Profile	1.272.684	1,56
13	Container (40 emply)	1.146.923	1,40
14	Iron and Steel	1.142.358	1,40
15	Sodium Bicarboante	1.128.123	1,38
16	Marble	888.617	1,09
17	Crude Oil	674.400	0,82
18	White Cement	549.738	0,67
19	Calsit	486.554	0,59
20	Stone Chips	481.136	0,59
21	Diesel Oil	477.831	0,58
22	Building Plaster	455.301	0,56
23	Gass Oil	436.508	0,53
24	Chrome	426.481	0,52
25	Borax	385.765	0,47
	Other	10.113.267	12,37
	Total	**81.779.528**	**100,00**

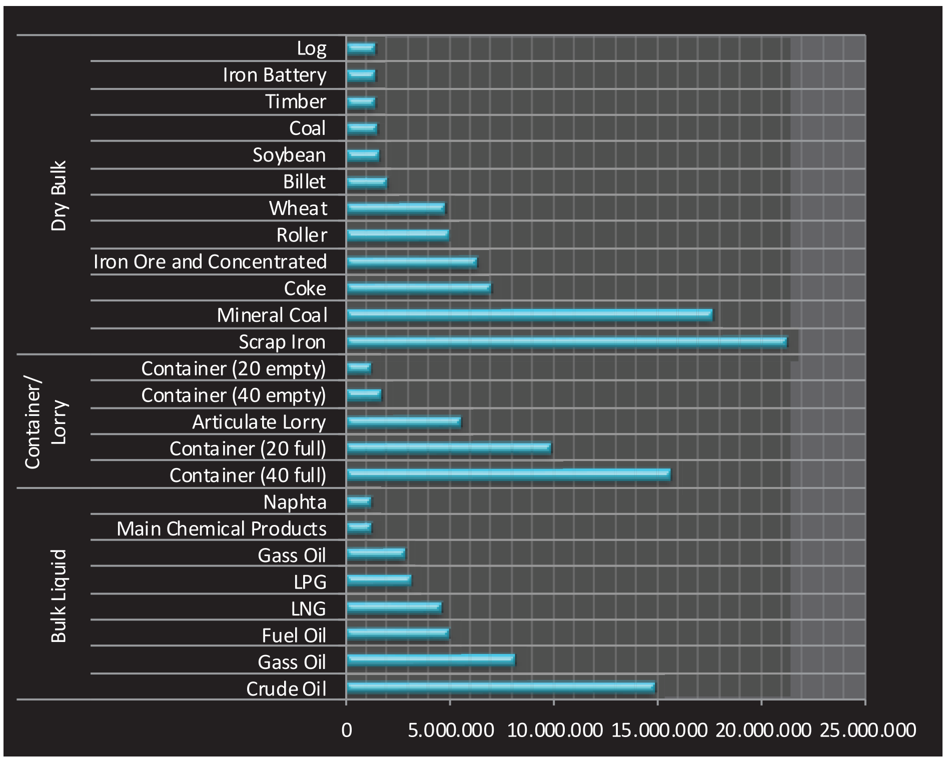
Source: **Republic of Turkey Ministry of Transport, Maritime Affairs and Communication**

TABLE (37): Imports by the Types of Cargoes 2011

Rank	Cargo List	Import mtons	%
1	Scrap Iron	21.220.559	12,23
2	Mineral Coal	17.624.841	10,16
3	Container (40 full)	15.642.095	9,01
4	Crude Oil	14.835.965	8,55
5	Container (20 full)	9.854.616	5,68
6	Gass Oil	8.124.162	4,68
7	Coke	6.942.008	4
8	Iron Ore and Concentrated	6.321.600	3,64
9	Articulate Lorry	5.537.133	3,19
10	Fuel Oil	4.994.321	2,88
11	Roller	4.910.667	2,83
12	Wheat	4.729.282	2,72
13	LNG	4.610.703	2,66
14	LPG	3.103.860	1,79
15	Gass Oil	2.793.494	1,61
16	Billet	1.976.438	1,14
17	Container (40 empty)	1.711.017	0,99
18	Soybean	1.585.143	0,91
19	Coal	1.468.731	0,85
20	Timber	1.370.311	0,79
21	Iron Battery	1.358.421	0,78
22	Log	1.356.239	0,78
23	Main Chemical Products	1.243.244	0,72
24	Naphta	1.195.634	0,69
25	Container (20 empty)	1.193.315	0,69
	Other	27.851.385	16,05
	Total	**173.555.184**	100

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

GRAPH (28): Imports by the Types of Cargoes 2011



The Progress In Seaborne Trade by Country Groups

In the year 2011, 37.6 million tons of export and 66.5 million tons of import, totally 104.1 million tons of transportation have been realized to the OECD countries. Table 38 and 39 shows the export and import values to the OECD countries.

TABLE (38) : Seaborne Trade to OECD Countries (2011)(In Quantity)Export

LOADING						
			Export			
OECD Country	**Turkish Flag**	**Home Land Flag**	**Foreign Flag**	**Total Export**	**Transit Export**	**Total Export**
Italy	4.452.104	338.403	6.862.846	11.653.353	25.564.526	37.217.879
U.S.A.	85.940	0	3.559.498	3.645.438	7.400.287	11.045.725
Spain	1.018.184	14.150	2.909.786	3.942.120	2.745.177	6.687.297
France	157.207	0	1.255.957	1.413.164	4.818.513	6.231.677
Greece	522.524	123.190	2.717.847	3.363.561	1.588.028	4.951.589
Belgium	67.149	1.800	3.845.107	3.914.056	306.881	4.220.937
Israel	484.384	850	2.863.016	3.348.250	322.061	3.670.311
Holland	71.760	150.806	656.518	879.084	2.204.629	3.083.713
Romania	441.839	0	1.043.896	1.485.735	319.148	1.804.883
Canada	5.750	0	149.742	155.492	1.480.730	1.636.222
England	43.879	77.070	1.026.876	1.147.825	180.412	1.328.237
S.Korea	0	0	518.723	518.723	566.876	1.085.599
Bulgaria	87.228	1.520	225.148	313.896	300.036	613.932
Portugal	23.450	0	128.457	151.907	388.513	540.420
Germany	68.136	50.070	407.245	525.451	0	525.451
Sweden	0	0	423.779	423.779	0	423.779
Slovakia	77.321	0	165.466	242.787	0	242.787
Poland	0	0	223.475	223.475	0	223.475
Denmark	26.000	10.000	85.476	121.476	0	121.476
Finland	0	0	67.885	67.885	0	67.885
Japan	0	0	21.398	21.398	30.988	52.386
Ireland	6.200	0	34.819	41.019	0	41.019
Norway	0	0	34.796	34.796	0	34.796
Iceland	0	0	25.495	25.495	0	25.495
Mexico	0	0	5.167	5.167	0	5.167
Hungary	0	0	140	140	0	140
Australia	0	0	0	0	0	0
S.Cyprus	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
U.S. Virjin Island	0	0	0	0	0	0
Austria	0	0	0	0	0	0
Czech Republic	0	0	0	0	0	0
Switzerland	0	0	0	0	0	0
Luxembourg	0	0	0	0	0	0
Chile	0	0	0	0	0	0
Total	**7.639.055**	**767.859**	**29.258.558**	**37.665.472**	**48.216.805**	**85.882.277**

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 43.3 %, U.S.A. 12,9 %, Spain 7,8 % shares.

TABLE (39) : Seaborne Trade to OECD Countries (2011)(In Quantity)Import

	UNLOADING					
	IMPORT					
OECD Country	Turkish Flag	Home Land Flag	Foreign Flag	Total	Transit Unloading	Total Unloading
U.S.A.	756.990	0	13.300.314	14.057.304	17.779	14.075.083
Italy	4.075.222	1.295.460	4.825.906	10.196.588	149.065	10.345.653
Romania	2.639.261	0	3.817.609	6.456.870	461.393	6.918.263
Belgium	98.285	0	5.624.204	5.722.489	379.288	6.101.777
Greece	417.735	483.995	3.475.409	4.377.139	115.195	4.492.334
Israel	294.154	4.000	3.985.438	4.283.592	15.797	4.299.389
Spain	365.526	4.816	2.356.772	2.727.114	329.470	3.056.584
Bulgaria	534.031	106.729	1.786.695	2.427.455	282.572	2.710.027
England	166.496	46.417	2.344.812	2.557.725	21.847	2.579.572
Holland	122.533	136.826	2.204.865	2.464.224	36.708	2.500.932
Norway	0	0	2.179.902	2.179.902	22	2.179.924
Canada	0	0	2.094.676	2.094.676	0	2.094.676
France	375.346	0	1.358.818	1.734.164	47.111	1.781.275
Germany	76.147	115	1.345.021	1.421.283	2.217	1.423.500
Australia	0	0	1.003.929	1.003.929	0	1.003.929
Japan	31.832	0	651.974	683.806	1.511	685.317
Finland	0	5.518	571.827	577.345	0	577.345
Sweden	2.306	0	455.529	457.835	173	458.008
Denmark	3.574	3.992	426.081	433.647	7	433.654
S.Korea	33.316	0	300.400	333.716	293	334.009
Portugal	15.101	0	140.730	155.831	22.792	178.623
Slovakia	12.293	0	90.859	103.152	735	103.887
Poland	4.605	0	60.365	64.970	1.005	65.975
Mexico	0	0	37.696	37.696	2.779	40.475
Ireland	0	0	270	270	0	270
S.Cyprus	0	0	0	0	0	0
Iceland	0	0	0	0	0	0
Hungary	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
U.S. Virjin Island	0	0	0	0	0	0
Austria	0	0	0	0	0	0
Czech Republic	0	0	0	0	0	0
Switzerland	0	0	0	0	0	0
Luxembourg	0	0	0	0	0	0
Chile	0	0	0	0	0	0
Total	**10.024.753**	**2.087.868**	**54.440.101**	**66.552.722**	**1.887.759**	**68.440.481**

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

Among OECD countries, the first three that Turkey imports from / that conducts transit unloading in Turkey are U.S.A. (20.6%), Italy (15.1%) and Romania (10.1%).

In the year of 2011, the seaborne trade volume between Turkey and the OECD countries was 154.322.758 metric tons. 104.218.194 metric tons of this amount was import –export while 50.104.564 metric tons was transit cargoes.

The seaborne trade share of the Turkish flag vessels was 16.95 % while OECD country flag vessels' share was 2.74% and foreign flag vessels' was 80.31%.

GRAPH (29): Seaborne Trade to OECD Countries (2011)

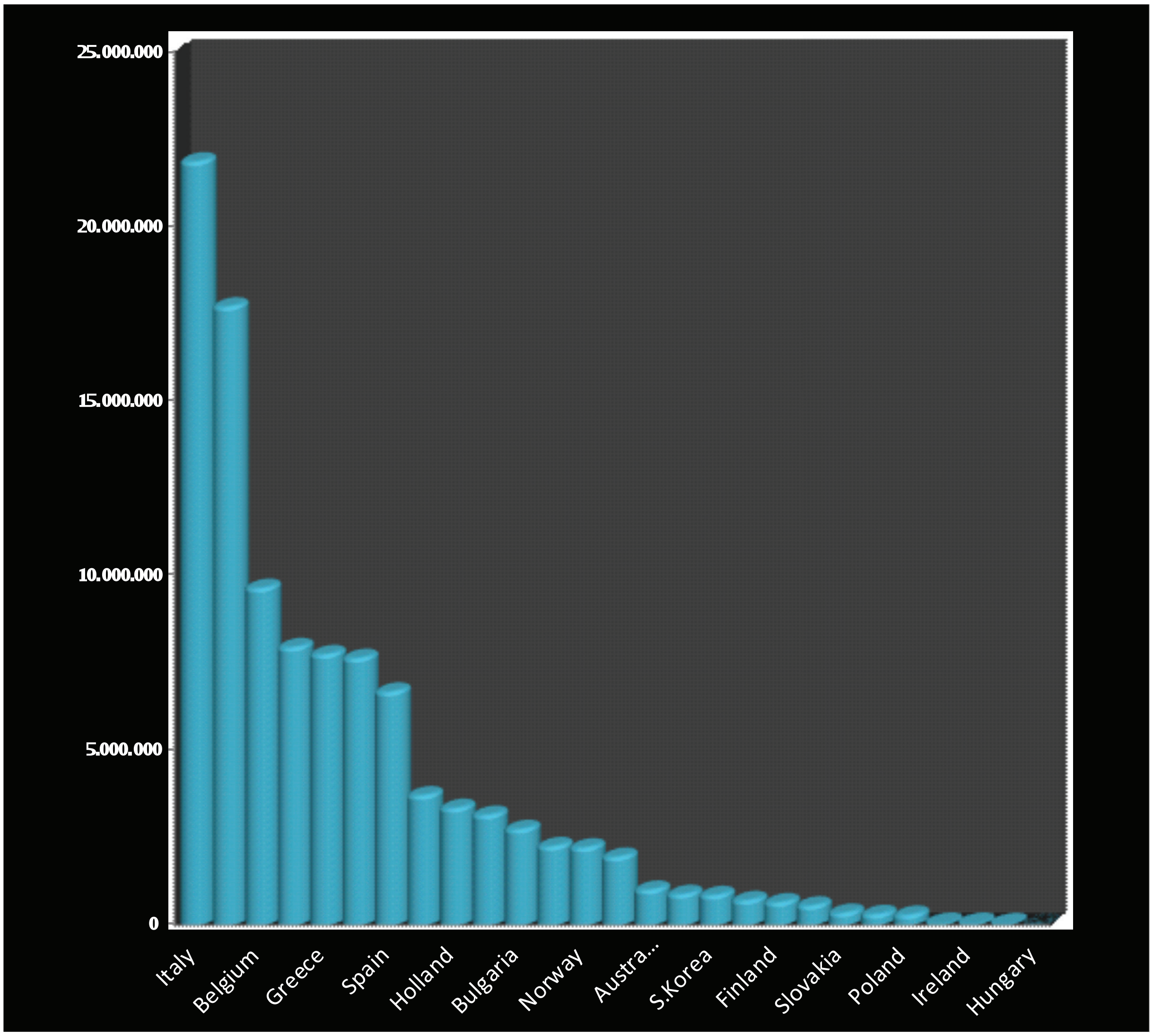


TABLE (40): Seaborne Trade to EU Countries (mton)(2011)Export

LOADING						
	Export					
OECD Country	**Turkish Flag**	**Home Land Flag**	**Foreign Flag**	**Total Export**	**Transit Export**	**Total Export**
Italy	4.452.104	338.403	6.862.846	11.653.353	25.564.526	37.217.879
U.S.A.	85.940	0	3.559.498	3.645.438	7.400.287	11.045.725
Spain	1.018.184	14.150	2.909.786	3.942.120	2.745.177	6.687.297
France	157.207	0	1.255.957	1.413.164	4.818.513	6.231.677
Greece	522.524	123.190	2.717.847	3.363.561	1.588.028	4.951.589
Belgium	67.149	1.800	3.845.107	3.914.056	306.881	4.220.937
Israel	484.384	850	2.863.016	3.348.250	322.061	3.670.311
Holland	71.760	150.806	656.518	879.084	2.204.629	3.083.713
Romania	441.839	0	1.043.896	1.485.735	319.148	1.804.883
Canada	5.750	0	149.742	155.492	1.480.730	1.636.222
England	43.879	77.070	1.026.876	1.147.825	180.412	1.328.237
S.Korea	0	0	518.723	518.723	566.876	1.085.599
Bulgaria	87.228	1.520	225.148	313.896	300.036	613.932
Portugal	23.450	0	128.457	151.907	388.513	540.420
Germany	68.136	50.070	407.245	525.451	0	525.451
Sweden	0	0	423.779	423.779	0	423.779
Slovakia	77.321	0	165.466	242.787	0	242.787
Poland	0	0	223.475	223.475	0	223.475
Denmark	26.000	10.000	85.476	121.476	0	121.476
Finland	0	0	67.885	67.885	0	67.885
Japan	0	0	21.398	21.398	30.988	52.386
Ireland	6.200	0	34.819	41.019	0	41.019
Norway	0	0	34.796	34.796	0	34.796
Iceland	0	0	25.495	25.495	0	25.495
Mexico	0	0	5.167	5.167	0	5.167
Hungary	0	0	140	140	0	140
Australia	0	0	0	0	0	0
S.Cyprus	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
U.S. Virjin Island	0	0	0	0	0	0
Austria	0	0	0	0	0	0
Czech Republic	0	0	0	0	0	0
Switzerland	0	0	0	0	0	0
Luxembourg	0	0	0	0	0	0
Chile	0	0	0	0	0	0
Total	**7.080.830**	**1.432.414**	**23.986.081**	**32.499.325**	**38.547.211**	**71.046.536**

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

In the year 2011, 32.4 million tons of export and 45.9 million tons of import, totally 78.3 million tons of seaborne transportation have been realized to the EU countries.

The first 3 major countries as Turkey's export & transit loading foreign trade partners among EU countries are Italy with 43.3 %, U.S.A. with 12.9 %, Spain with 7.8 % shares.

The first 3 major countries as Turkey's import & transit unloading foreign trade partners among EU countries are Italy with 20.6 %, Italy 15.1 % and Romania 10.1 % shares.

TABLE (41) : Seaborne Trade to EU Countries (mton) 2011 IMPORT

	UNLOADING					
	IMPORT					
OECD Country	**Turkish Flag**	**Home Land Flag**	**Foreign Flag**	**Total**	**Transit Unloading**	**Total**
U.S.A.	756.990	0	13.300.314	14.057.304	17.779	14.075.083
Italy	4.075.222	1.295.460	4.825.906	10.196.588	149.065	10.345.653
Romania	2.639.261	0	3.817.609	6.456.870	461.393	6.918.263
Belgium	98.285	0	5.624.204	5.722.489	379.288	6.101.777
Greece	417.735	483.995	3.475.409	4.377.139	115.195	4.492.334
Israel	294.154	4.000	3.985.438	4.283.592	15.797	4.299.389
Spain	365.526	4.816	2.356.772	2.727.114	329.470	3.056.584
Bulgaria	534.031	106.729	1.786.695	2.427.455	282.572	2.710.027
England	166.496	46.417	2.344.812	2.557.725	21.847	2.579.572
Holland	122.533	136.826	2.204.865	2.464.224	36.708	2.500.932
Norway	0	0	2.179.902	2.179.902	22	2.179.924
Canada	0	0	2.094.676	2.094.676	0	2.094.676
France	375.346	0	1.358.818	1.734.164	47.111	1.781.275
Germany	76.147	115	1.345.021	1.421.283	2.217	1.423.500
Australia	0	0	1.003.929	1.003.929	0	1.003.929
Japan	31.832	0	651.974	683.806	1.511	685.317
Finland	0	5.518	571.827	577.345	0	577.345
Sweden	2.306	0	455.529	457.835	173	458.008
Denmark	3.574	3.992	426.081	433.647	7	433.654
S.Korea	33.316	0	300.400	333.716	293	334.009
Portugal	15.101	0	140.730	155.831	22.792	178.623
Slovakia	12.293	0	90.859	103.152	735	103.887
Poland	4.605	0	60.365	64.970	1.005	65.975
Mexico	0	0	37.696	37.696	2.779	40.475
Ireland	0	0	270	270	0	270
S.Cyprus	0	0	0	0	0	0
Iceland	0	0	0	0	0	0
Hungary	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
U.S. Virjin Island	0	0	0	0	0	0
Austria	0	0	0	0	0	0
Czech Republic	0	0	0	0	0	0
Switzerland	0	0	0	0	0	0
Luxembourg	0	0	0	0	0	0
Chile	0	0	0	0	0	0
Total	**9.019.963**	**2.532.879**	**34.428.938**	**45.981.780**	**1.854.896**	**47.836.676**

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

In the year 2011, 12.7 million tons of export and 60.5 million tons of import, totally 73.2 million tons seaborne transportation have been realized to the BSEC countries.

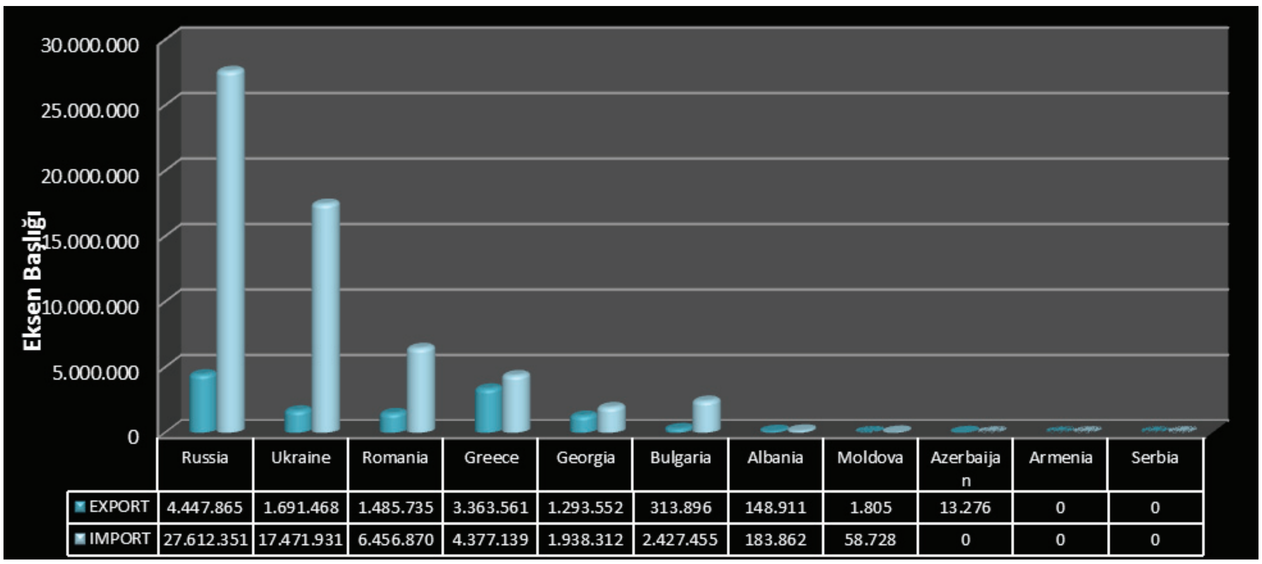
The first 3 major countries as Turkey's export & transit loading foreign trade partners among BSEC countries are Russia with 29.3 %, Greece with 28.2 %, Ukraine with 17.1 % shares.

TABLE (42) : Seaborne Trade to BSEC Countries (Tons) Export

LOADING						
	EXPORT					
BSEC Country	Turkish Flag	Home Land Flag	Foreign Flag	Total	Transit Loading	Total Loading
Russia	633.671	703.992	3.110.202	4.447.865	688.856	5.136.721
Greece	522.524	123.190	2.717.847	3.363.561	1.588.028	4.951.589
Ukraine	293.018	178.987	1.219.463	1.691.468	1.303.642	2.995.110
Georgia	712.475	15.920	565.157	1.293.552	592.806	1.886.358
Romania	441.839	0	1.043.896	1.485.735	319.148	1.804.883
Bulgaria	87.228	1.520	225.148	313.896	300.036	613.932
Albania	24.776	27.376	96.759	148.911	0	148.911
Azerbaijan	0	0	13.276	13.276	0	13.276
Moldova	100	0	1.705	1.805	0	1.805
Serbia	0	0	0	0	0	0
Armenia	0	0	0	0	0	0
Total	**2.715.631**	**1.050.985**	**8.993.453**	**12.760.069**	**4.792.516**	**17.552.585**

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

GRAPH (30) : Seaborne Trade to BSEC Countries (%) Export



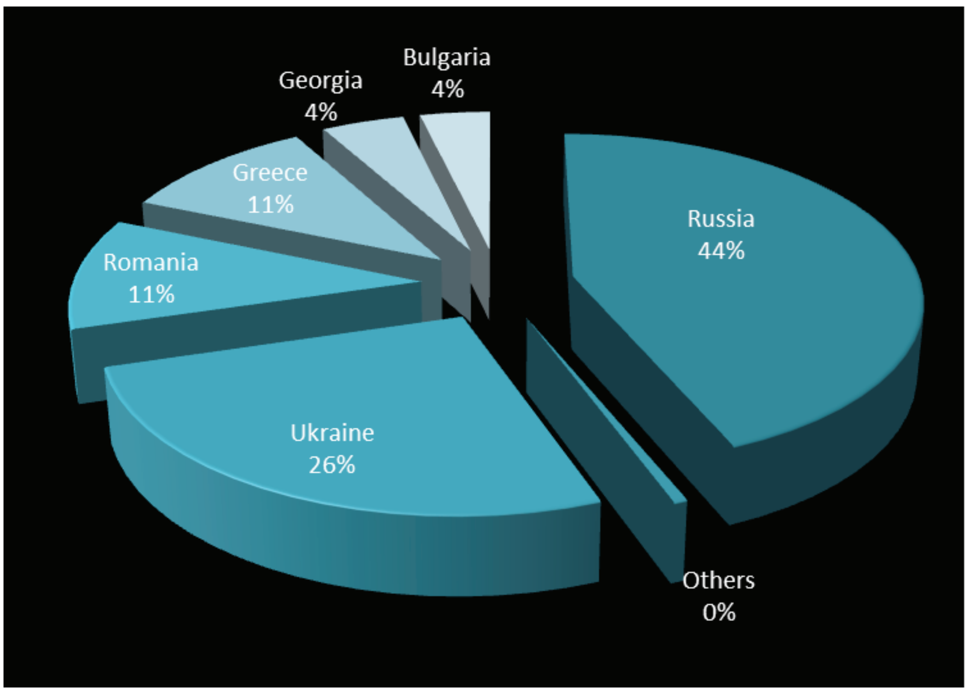
The first 3 major countries as Turkey's import & transit unloading foreign trade partners among BSEC countries are Russia with 46 %, Ukrania with 28.3 % and Romania with 11 % shares.

TABLE (43): Seaborne Trade to BSEC Contries Import

	UNLOADING					
	IMPORT					
BSEC Country	Turkish Flag	Home Land Flag	Foreign Flag	Total	Transit Loading	Total Loading
Russia	3.087.036	5.322.497	19.202.818	27.612.351	1.120.476	28.732.827
Ukraine	4.292.016	867.318	12.312.597	17.471.931	338.064	17.809.995
Romania	2.639.261	0	3.817.609	6.456.870	461.393	6.918.263
Greece	417.735	483.995	3.475.409	4.377.139	115.195	4.492.334
Bulgaria	534.031	106.729	1.786.695	2.427.455	282.572	2.710.027
Georgia	941.696	5.567	991.049	1.938.312	140.283	2.078.595
Albania	52.900	25.603	105.359	183.862	0	183.862
Moldova	2.749	3.053	52.926	58.728	0	58.728
Azerbaijan	0	0	0	0	0	0
Serbia	0	0	0	0	0	0
Armenia	0	0	0	0	0	0
Total	**11.967.424**	**6.814.762**	**41.744.462**	**60.526.648**	**2.457.983**	**62.984.631**

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

GRAPH (31): Seaborne Trade to BSEC Countries Foreign Trade



World Container Fleet by Country of Domicile

The “country of domicile” examination (including container ships of 1.000 GRT and over) show that at the beginning of 2011, 69.3 per cent of the container capacity was not registered in the country of domicile of the owner, but flagged out.

TABLE (44) : World Full Container Fleet by Country of Domicile (1000 grt and over)

		National Flag				Foreign Flag				Total Fleet Controlled			
TEU Rank	Country	No	1000 dwt	1000 TEU	Av. Age	No	1000 dwt	1000 TEU	Av. Age	No	1000 dwt	1000 TEU	Av. Age
1	Germany	291	15.429	1.205	9,4	1.485	46.891	3.603	7,7	1.716	62.321	4.808	8
2	Japan	2	104	9	8,2	320	14.929	1.187	6,4	322	15.032	1.197	6,4
3	Denmark	89	7.062	499	9,5	135	7.058	512	8,7	224	14.120	1.010	9
4	Chine	184	5.749	415	14,9	148	4.597	354	12,4	332	10.346	770	13,8
5	Greece	31	2.269	178	12,8	180	7.305	549	41,1	211	9.574	727	13,9
6	Taiwan	26	712	52	14,1	157	6.348	504	9,6	183	7.061	556	10,3
7	France	24	1.932	159	4,8	77	4.352	350	6,7	101	6.283	509	6,3
8	Korea Rep.Of	69	923	63	14	65	3754	293	7,5	134	4.676	356	10,9
9	UK	31	1845	151	6,9	38	2.400	203	8	69	4.244	355	7,5
10	Singapore	128	3.815	276	9,2	28	920	69	10,4	156	4.735	345	9,4
11	Canada	2	17	1	22,6	54	3174	260	4,7	56	3.191	261	5,3
12	US	49	1865	141	24	35	1.193	88	11,9	84	3.058	229	19
13	Isreal	6	377	27	9,7	34	2.043	157	8,8	40	2.420	185	8,9
14	Hong Kong	41	2.113	172	5,7	9	158	11	11,3	50	2.270	183	6,7
15	Kuwait	6	292	21	18,3	21	1.205	90	13,5	27	1.497	110	14,5
16	S. Cyprus	7	215	16	6,5	28	867	64	6,3	35	1.082	79	6,4
17	Turkey	38	616	45	10,2	24	328	26	8,6	62	944	71	9,6
18	Malaysia	40	804	55	16,6	6	75	5	14,2	46	879	60	16,3
19	Indonesia	93	781	47	19,1	5	110	7	15,4	98	891	54	18,9
20	Chile	1	21	2	11,2	10	628	50	4,7	11	649	52	5,3
World	**Total**									**4.845**	**183.671**	**14.066**	**30.7**

Source : ISL May/June 2011

As regards the owner countries, German ship owners controlled by far the largest part of the world container fleet, namely 4.8 mill. TEU (1.716 container vessels) followed by Japan 1.2 mill TEU (322 container vessel) and Denmark 1.0 mill TEU (224 container vessels).

Container handling in Turkey in the years 2002 and 2011 are shown in Table 45 below on the basis of public and private sectors.

When the container transportations in 2010 is examined as cabotage, exports, imports and transit cargoes; on the basis of TEU, exports became 2.6 million TEU, imports 2.7 million TEU, cabotage loading-unloading 459.594 TEU and transit 757.171 TEU.

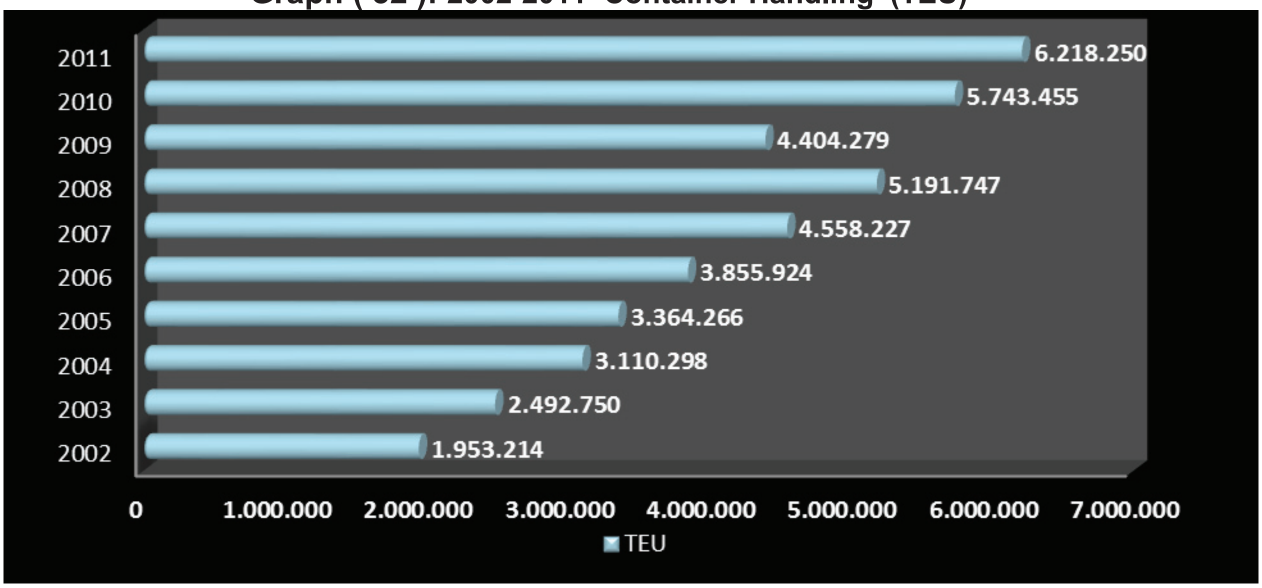
Transportation volume of Turkey’s container transports by sea way was 1,9 million TEU in 2000; in 2011 it became 6.2 million TEU, at the same period imports cargoes increased to 2.7million TEU from 928.257 TEU and the exports cargoes increased to 2.6 million TEU when compared with 942.643 TEU in 2002.

TABLE (45) : Container Handling 2002-2011 (TEU)

	Loading (TEU)			Unloading (TEU)			Foreign			
Years	**Cabotage**	**Export**	**Total**	**Cabotage**	**Import**	**Total**	**Trade**	**Transit**	**Total**	**Change %**
2002	46,33	942,643	988,973	35,984	928,257	964,241	1.953.214	0	1.953.214	111.3%
2003	58,766	1.174.016	1.232.782	39,072	1.110.670	1.149.742	2.382.524	110,226	2.492.750	27.6%
2004	20,682	1.490.066	1.510.748	13,334	1.409.945	1.423.279	2.934.027	176,271	3.110.298	24.7%
2005	6,579	1.598.450	1.605.029	8,167	1.577.932	1.586.099	3.191.128	173,138	3.364.266	8.2%
2006	14,008	1.809.433	1.823.441	6,913	1.840.649	1.847.562	3.671.003	184,921	3.855.924	14.6%
2007	34,005	2.152.014	2.186.019	27,128	2.224.653	2.251.781	4.437.800	120,427	4.558.227	18.2%
2008	86,867	2.429.820	2.516.687	82,934	2.474.773	2.557.707	5.074.394	117,353	5.191.747	13.9%
2009	70,329	2.131.948	2.202.277	71,696	2.117.764	2.189.460	4.391.737	12,542	4.404.279	- 15.2%
2010	104,278	2.306.587	2.410.865	104,047	2.354.304	2.458.351	4.869.216	874,239	5.743.455	30,40%
2011	**154.338**	**2.690.889**	**2.845.227**	**305.256**	**2.770.190**	**3.075.446**	**5.461.079**	**757.171**	**6.218.250**	**8,3%**

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

Graph (32): 2002-2011 Container Handling (TEU)



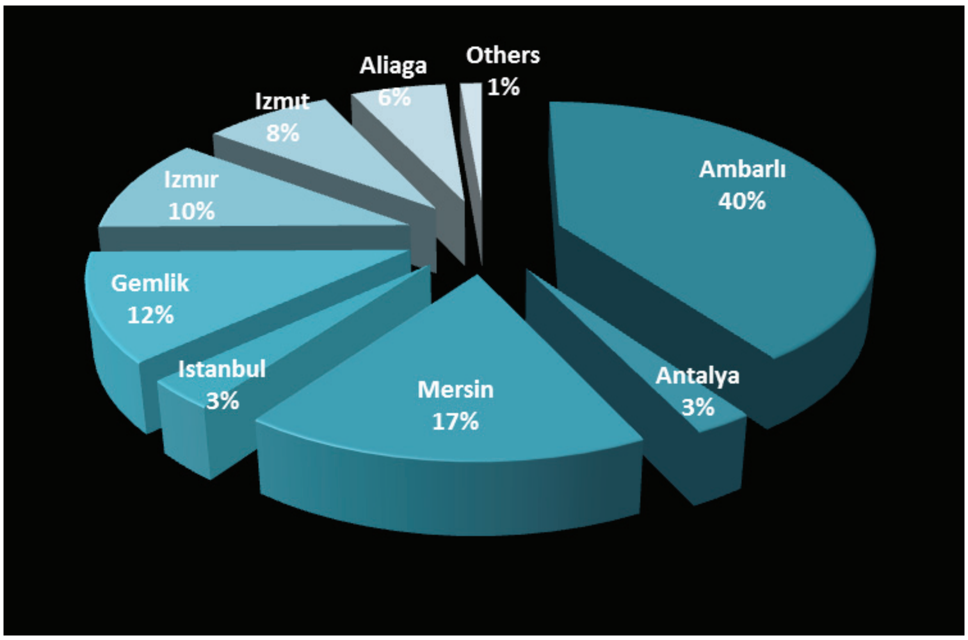
According to the 2010 container loading and unloading / handling (TEU) chart of the Harbour Masters, in the ports operating under Ambarlı Harbour Master handled an amount of 2.624.711 TEU, the ports operating under Mersin Harbour Master handled a sum of 1.126.866 TEU and in the ports operating under Gemlik Harbour Master handled a total of 757.128 TEU of containers.

TABLE (46) : Position at the 17 Ports- Container Handling (TEU) 2011

	LOADING				UNLOADING				
Port Authority	**Export**	**Cabotage**	**Transit**	**Total**	**Import**	**Cabotage**	**Transit**	**Total**	**General Total**
AMBARLI	835.320	64.750	386.159	1.286.229	938.764	45.855	353.863	1.338.482	2.624.711
MERSİN	539.928	17.616	346	557.890	538.505	22.382	8.089	568.976	1.126.866
GEMLİK	363.397	14.170	22	377.589	358.836	20.557	146	379.539	757.128
İZMİR	323.535	7.945	0	331.480	315.098	25.908	0	341.006	672.486
İZMİT	244.495	13.401	0	257.896	245.610	4.327	4	249.941	507.837
ALİAĞA	192.100	4.412	4.207	200.719	152.290	19.956	4.183	176.429	377.147
İSTANBUL	88.831	10.569	0	99.400	105.183	1.499	0	106.682	206.082
ANTALYA	83.062	0	64	83.126	82.348	0	0	82.348	165.474
TRABZON	3.914	16.342	0	20.256	14.528	5.467	0	19.995	40.251
İSKENDERUN	12.074	0	0	12.074	13.393	9	88	13.490	25.564
TEKİRDAĞ	3.532	341	0	3.873	2.546	1.756	0	4.302	8.175
SAMSUN	61	3.279	0	3.340	3.089	1.007	0	4.096	7.436
BANDIRMA	0	968	0	968	0	1.080	0	1.080	2.048
KARABİGA	629	325	0	954	0	900	0	900	1.854
RİZE	0	215	0	215	0	215	0	215	430
BARTIN	11	0	0	11	0	0	0	0	11
KDZ.EREĞLİSİ	0	5	0	5	0	0	0	0	5
TOPLAM	**2.690.889**	**154.338**	**390.798**	**3.236.025**	**2.770.190**	**150.918**	**366.373**	**3.287.481**	**6.523.506**

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

Graph (33) : Position at the 8 Ports Container Handling (TEU %) 2011



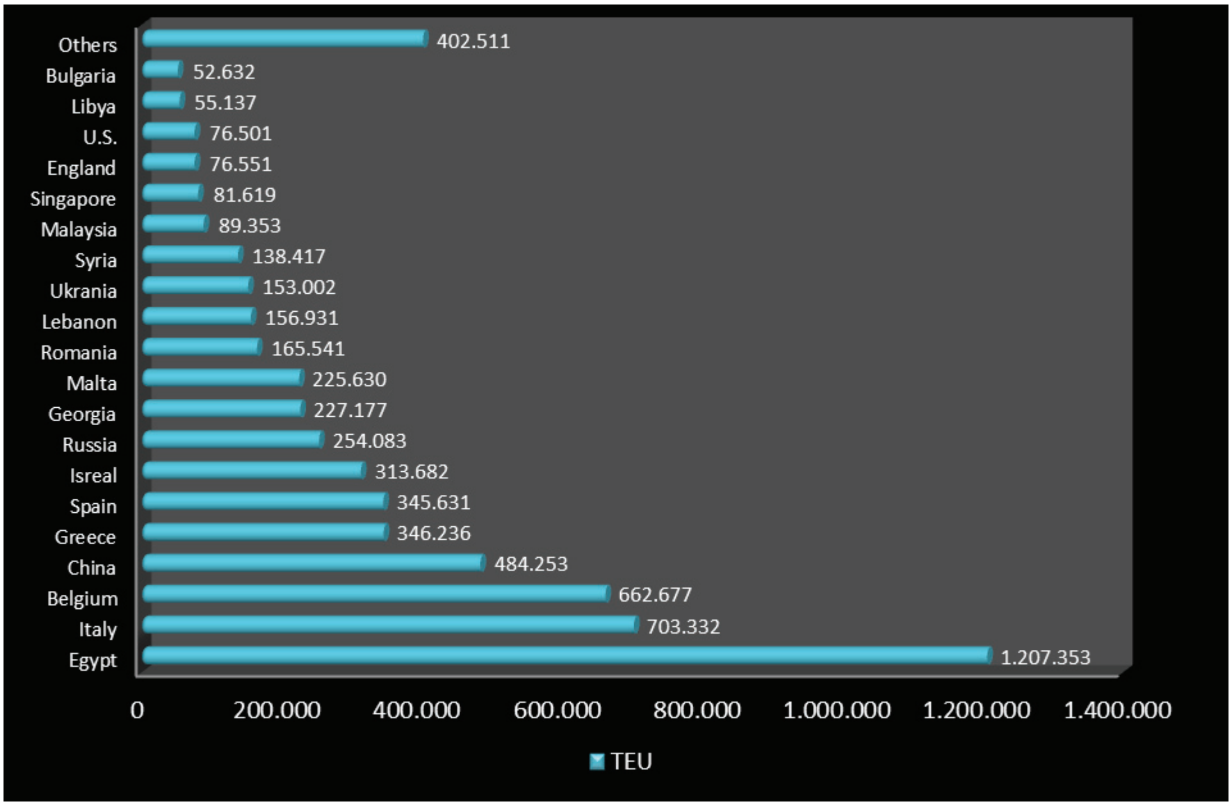
As of 2011, the countries which Turkey performed foreign trade with / conducted transit container transportation are as follows: Egypt (19.4%), Italy (11.3%) and Belgium (10.6%). The data of the foreign trade / transit container transportation of top 20 countries are shown in the Table 47.

TABLE (47) : Position at the 20 Country Container Foreign Trade Handling (TEU) 2011

		Loading (TEU)			Unloading (TEU)			
Rank	**Country**	**Export**	**Transit**	**Total**	**Import**	**Transit**	**Total**	**General Total**
1	Egypt	544.097	19.933	564.030	613.692	29.632	643.324	1.207.353
2	Italy	388.241	13.835	402.076	294.249	7.007	301.257	703.332
3	Belgium	316.113	30.606	346.719	283.979	31.980	315.959	662.677
4	China	171.664	33.880	205.544	171.883	106.826	278.709	484.253
5	Greece	149.905	5.255	155.160	184.460	6.616	191.076	346.236
6	Spain	179.487	17.602	197.089	122.678	25.865	148.543	345.631
7	Isreal	126.831	3.494	130.325	182.115	1.242	183.357	313.682
8	Russia	79.567	56.975	136.542	94.404	23.137	117.541	254.083
9	Georgia	71.039	48.708	119.747	96.590	10.840	107.430	227.177
10	Malta	122.326	89	122.415	102.864	351	103.215	225.630
11	Romania	67.365	24.697	92.062	31.142	42.337	73.479	165.541
12	Lebanon	56.374	533	56.907	99.999	25	100.024	156.931
13	Ukrania	29.261	46.187	75.448	64.399	13.155	77.554	153.002
14	Syria	13.033	511	13.544	124.607	266	124.873	138.417
15	Malaysia	3.299	284	3.583	85.714	56	85.770	89.353
16	Singapore	24.513	14.795	39.308	20.364	21.947	42.311	81.619
17	England	57.275	1.852	59.127	15.399	2.024	17.423	76.551
18	U.S.	39.586	758	40.344	34.725	1.432	36.157	76.501
19	Libya	31.461	1.409	32.870	22.212	55	22.267	55.137
20	Bulgaria	607	23.260	23.867	6.785	21.980	28.765	52.632
	Others	218.846	46.135	264.981	117.930	19.600	137.530	402.511
	Total	**2.690.889**	**390.798**	**3.081.687**	**2.770.190**	**366.373**	**3.136.563**	**6.218.249**

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

GRAPH (34) : Position of the 20 Countries' Container Foreign Trade Handling (TEU) 2011



Vehicle Transportation through Ro-Ro Lines

There were 22 Ro-Ro ships in the Turkish Merchant Fleet at the end of 2011with a capacity of 203.335 DWT. (450.877 GRT.)

Ro-Ro lines of Turkey in 2003-2011 are shown below.

TABLE (48): Ro-Ro Lines Transported Vehicles (2003- 2011)

Region	Ro-Ro Lines	2003	2004	2005	2006	2007	2008	2009	2010	2011
Marmara	Pendik/Haydarpaşa-Trieste	107,135	112,602	107,64	119,088	160,203	149,062	111,401	116,815	139.270
	Ambarlı-Trieste	32,591	37,888	33,333	38,954	41,085	39,998	30,372	37,627	18.017
	Pendik/Haydarpaşa-Marseille	0	0	0	0	0	0	0	7.480	2.130
	Tekirdağ-Toulon	0	0	0	0	0	0	0	9.269	0
	Haydarpaşa-Odessa	0	0	0	0	0	0	0	0	0
	Haydarpaşa-Yuzhnyy	0	0	0	0	0	0	0	0	0
	Regional Total	**139,726**	**150.490**	**140,973**	**158,042**	**201,288**	**189.060**	**141,773**	**171,191**	**159.417**
Mediterrenean	Taşucu-Girne	13,404	33,241	38,768	35.560	33,393	32,305	31,032	36,071	36.316
	Mersin-Magosa	9,354	13,112	15,985	13,488	12,938	23,766	19,966	19,107	18.275
	Mersin-Trieste	0	0	0	0	0	0	12.019	28,571	37.093
	Mersin-İskenderiye	0	0	0	0	0	0	0	0	253
	Regional Total	**22,758**	**46,353**	**54,753**	**49,048**	**46,331**	**56,071**	**63,017**	**84,638**	**91.937**
Aegean	Çeşme-Trieste	27,559	28.280	29,591	30,889	36,717	30,039	24,808	27,179	43.058
	İzmir-Dedeağaç	0	0	0	0	0	0	0	0	0
	Regional Total	**27,559**	**28.280**	**29,591**	**30,889**	**36,717**	**30,039**	**24,808**	**27,179**	**43.058**
Blacksea	Zonguldak-Ukrania	8,739	9,153	15,629	19,147	27,099	23,632	20,476	19,573	23.540
	Samsun-Novorossisky	14,582	21.090	26,781	27.120	29,598	21,148	9.280	15,145	10.742
	Samsun-Kavkaz	0	0	0	0	0	0	0	0	1.383
	Trabzon-Sochi	1,609	3,512	3,403	6,574	7.180	10.150	7,066	5,078	637
	Pize-Poti	5,372	5,032	3,648	742	0	0	0	0	0
	Regional Total	**30,302**	**38,787**	**49,461**	**53,583**	**63,877**	**54.930**	**36,822**	**39,796**	**36.302**
	Grand Total	220,345	263.910	274,778	291,562	348,213	330.100	266.420	322,804	330.714

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

Table 48 above shows the amounts of the transported full vehicles (export and import) in the years 2003-2011.

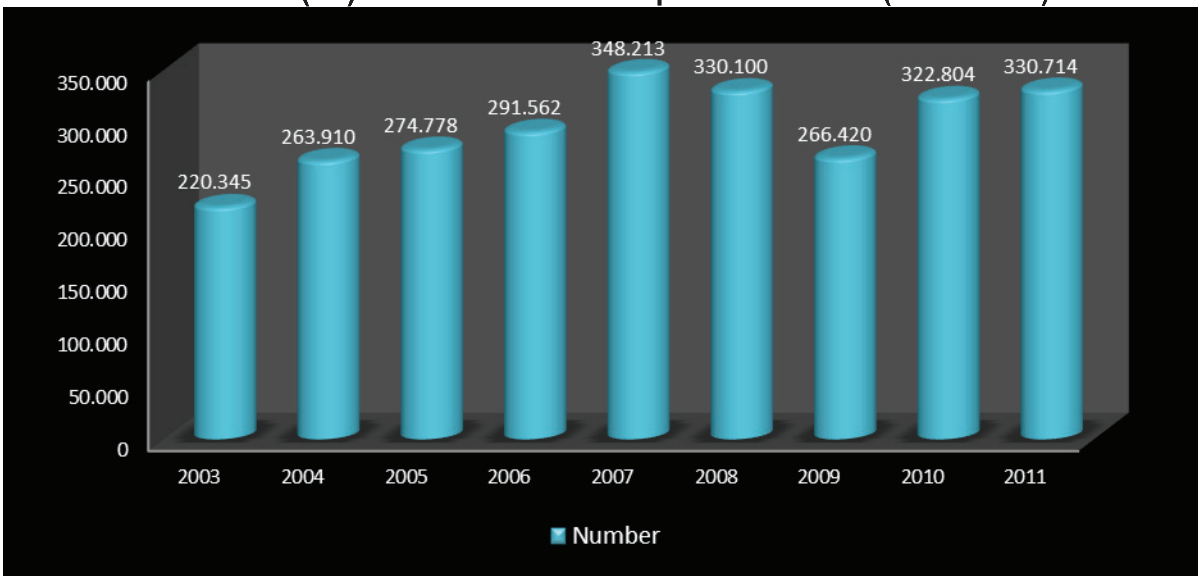
In The Black Sea region; 637 vehicles on Trabzon-Soçhi line, 10.742 vehicles on Samsun-Novorossisky line, 1.383 vehicles on Samsun-Kavraz line and 23.540 vehicles on Zonguldak- Ukraine line, totally regional 36.302 vehicles have been transported in 2011.

In The Marmara Sea region; 18.017 vehicles have been carried on **Ambarlı-Trieste line**, 139.270 vehicles on **Pendik/Haydarpaşa-Trieste line**, 2.130 vehicles on **Pendik/Haydarpaşa-Marseille line** totally regional 159.417 vehicles have been transported in 2011.

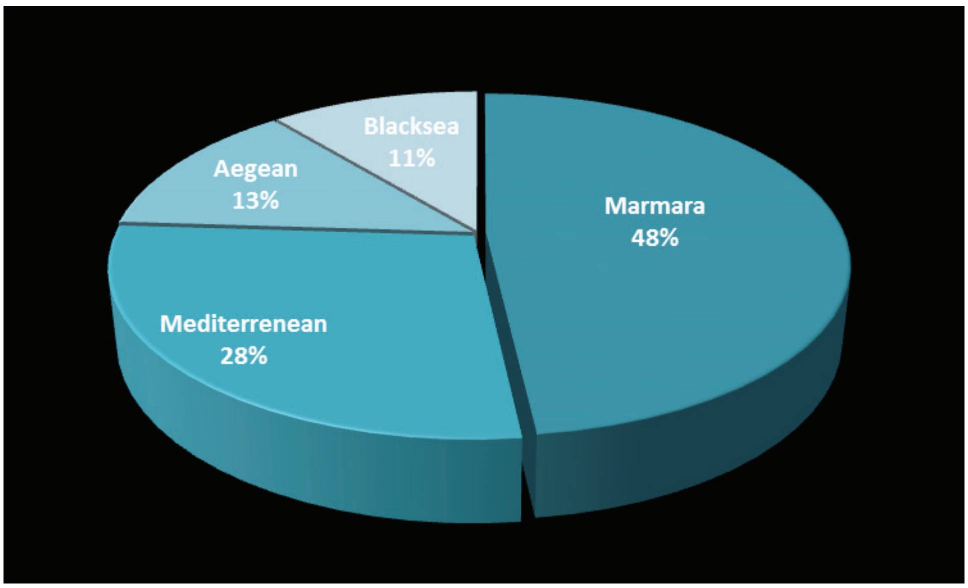
In The Aegean Sea region; 43.058 vehicles have been carried on **Çeşme-Trieste line**, totally regional 43.058 vehicles have been transported in 2011.

In The Mediterranean region; 36.316 vehicles have been carried on **Taşucu-Girne line**, 18.275 vehicles on **Mersin-Magosa line**, 37.093 vehicles have been carried on **Mersin-Trieste line,** 253 vehicles have been carried on **Mersin-Iskenderiye line,** totally regional 91.937 vehicles have been transported in 2011.

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



GRAPH (36) : RO-RO Lines Transported Vehicles (2011)



The majority of the transported vehicles by Regions are, 48 % the Sea of Marmara Region, 11 % Black Sea Region, 28 % Mediterranean Region and 13 % The Aegean Sea Region in 2011.


SHIP BUILDING

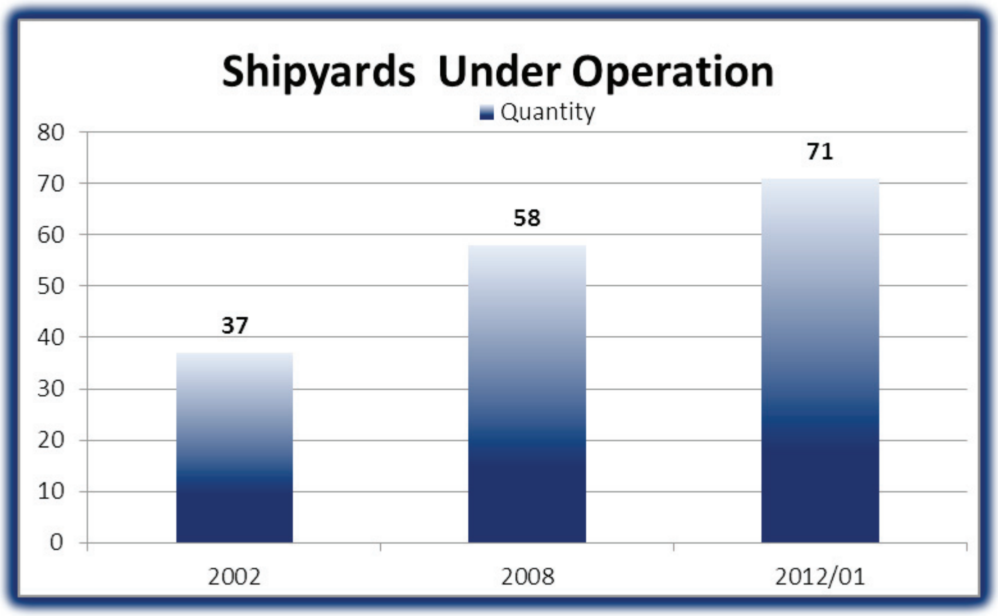
CHAPTER III

SHIPBUILDING INDUSTRY

General Outlook of Turkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, under operation rised up to 71 as of January 2012 while it was just only 37 in 2002 . The quantity of shipyards under construction are 54 by the end of 2011.

GRAPH (37): 2002 / 2011 Shipyards Under Operation



Source: Ministry of Transport, Maritime Affairs and Communications

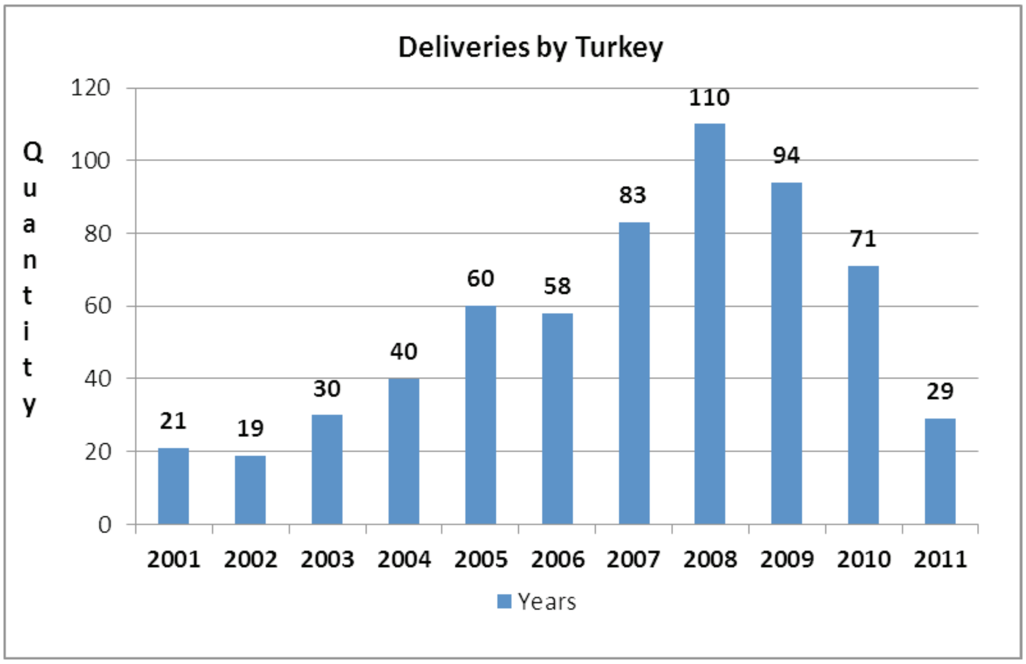
<u>Shipbuilding industry is a branch of heavy industry which provides;</u>

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

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

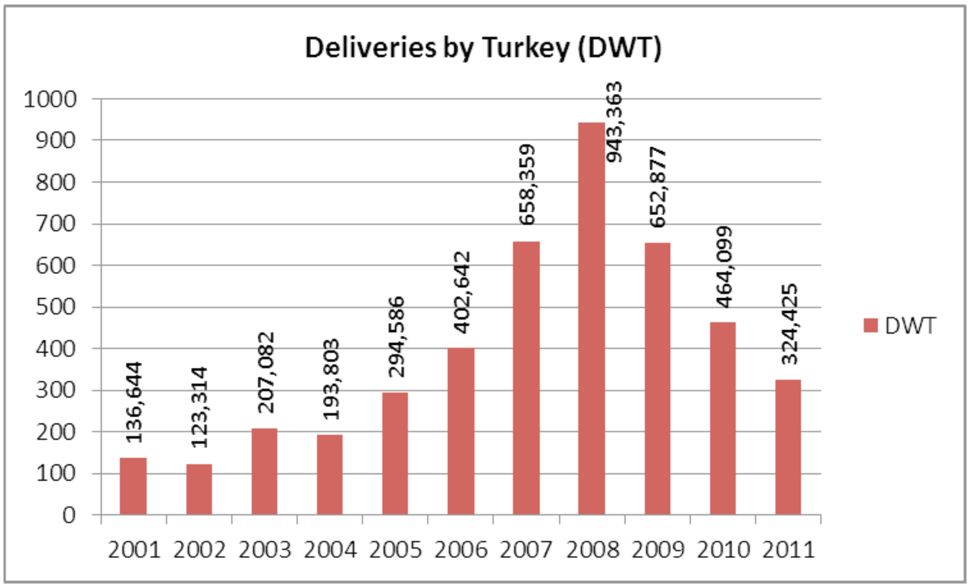
In 2011, 29 ships DWT of 324.425 tons had been delivered.

GRAPH (38) : Number of Ships Delivered Between 2001-2011



Source: Clarkson Research Services

GRAPH (39): DWT of Ships Delivered Between 2001-2011

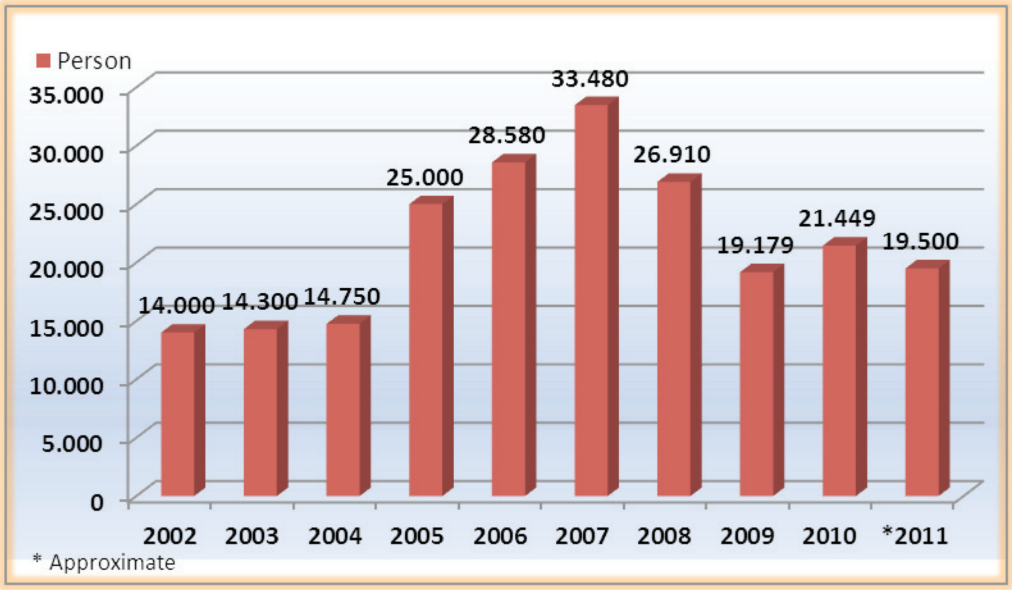


Source: Clarkson Research Services

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

GRAPH (40): Employee Numbers In Turkish Shipyards by 2011



Source: Turkish Shipbuilders' Association

TABLE (49): Shipyards Under Operation 2011

City	Shipyard Name
İSTANBUL	
1	Erkal Uluslararası Nakliyat ve Ticaret A.Ş.
2	Gemsan Gemi ve Gemi İşlet. San. Ve Tic. Ltd. Şti.
3	Hidrodinamik Gemi San. ve Tic. A.Ş.
4	Gemak Gemi İnşaat Sanayi ve Tic.A.Ş.
5	Desan Deniz İnşaat Sanayi A.Ş.
6	Şahin Çelik Sanayi A.Ş.
7	Yıldırım Gemi İnşa Sanayi A.Ş.
8	İstanbul Denizcilik Gemi İnşa san.
9	Anadolu Deniz İnşaat Kızakları San. ve Tic. A.Ş.
10	Deniz Endüstrisi A.Ş.
11	Türkter Tersane ve Deniz İşlet. A.Ş.
12	Yıldız Gemi ve Makine San. Tic. A.Ş.
13	Çelik Tekne Sanayi ve Ticaret A.Ş.
14	RMK Marine Gemi Yapım San.
15	Sedef Gemi İnşaatı A.Ş.
16	Tuzla Gemi Endüstrisi A.Ş.
17	Selah Makine ve Gemicilik End. A.Ş.
18	Dearsan Gemi İnşaat Sanayi A.Ş.
19	Ada Denizcilik ve Tersane İşlet. A.Ş.
20	Torlak Denizcilik Sanayi ve Tic. A.Ş.
21	Yardımcı Gemi İnşa A.Ş.
22	Çeksan Gemi İnşa San. Ve Tic. A.Ş.
23	Gisan Gemi İnşa San. ve Tic. Ltd. Şti.

24	Torgem Gemi İnş. Sanayi ve Tic. A.Ş.
25	Dentaş İnşaat ve Onarım San. A.Ş.
26	Çındemir Mak. Gemi Onarım ve Tersanecilik A.Ş.
27	Dalsan Liman İnş., Tarama, Gemicilik San.
İZMİT	
1	Türker Gemi Yapımı ve Sanayi Ticaret A.Ş.
2	Soli Gemi İnşa San. ve Tic. A.Ş.
3	TVK Gemi Yapım. San. Tic. A.Ş.
4	Marmara Tersanesi A.Ş.
5	Um Deniz Sanayi A.Ş.
6	Uzmar Gemi Yapım Sanayi A.Ş.
YALOVA	
1	NACİ SELİMOĞLU Deniz İşletmeciliği Tic. A.Ş.
2	SELTAŞ Denizcilik San. ve Tic. A.Ş.
3	YAŞARSAN Gemi İnşa San. ve Tic. Ltd.Şti.
4	ALTINTAŞ Mermer ve Tersanecilik San. ve Tic. A.Ş.
5	KURBAN Gemi İnşa İnş. San. ve Tic. Ltd.Şti.
6	CEMRE Mühendislik Gemi İnşa San. ve Tic. Ltd.Şti.
7	AYKIN Tersanecilik ve Taş. İnş. San.ve Tic.Ltd. Şti.
8	TÜRKOĞLU Gemi İnşa San. ve Tic. Ltd.Şti.
9	KOCATEPE Denizcilik ve Gemiinşa San. Tic.Ltd. Şti.
10	BEŞİKTAŞ Gemi İnşa A.Ş.
11	ARİF KALKAVAN Oğulları Gemicilik A.Ş.
12	DÜZGİT Yalova Gemi İnşa San. A.Ş.
13	DEN-TA Denizcilik Tic. ve San. Ltd.Şti.
14	VBG Altınova Tersaneleri
15	Sefine Denizcilik Tersanecilik tur. San. ve Tic. Ltd. Şti.
16	Boğaziçi Tersanecilik Gemi İnşa San. Ve Tic. A.Ş.
17	Özata Yat İnşa Çekek Bakım Onarım San.Tic.Ltd.Şti.
18	Altınova Yat İnşacılar San. ve Tic. A.Ş.
19	GİSAN Gemi İnşaa San. ve Tic. A.Ş.
20	Hatsan İnş.M.T. Gemi İnşa ve Deniz San.Tic.A.Ş.
21	Yüksel Tersanecilik
ZONGULDAK	
1	Azim Otel Turizm Deniz. Metal San. ve Tic. Ltd. Şti.
2	Ereğli Gemi İnşa San. ve Tic. A.Ş.
3	Madenci Gemi San. Ltd. Şti.
4	Med-Yılmaz Gemi İnşa San. ve Tic. A.Ş.
5	Umo Gemi San. Tic. Ltd. Şti.
6	Usmed Gemi İnşa San. ve Tic. A.Ş.
7	Ustamehmetoğlu Gemi Tersanesi
8	Ustaoğlu Yat ve Gemi San. Tic. A.Ş.
ÇANAKKALE	
1	Gelibolu Gemi İnş. San. ve Tic. A.Ş.
2	İçdaş Çelik Enerji Tersane ve Ulaş. San. ve A.Ş
TRABZON	
1	Rıfkı BAŞARAN Tersanesi

ORDU	
1	Karadeniz Gemi İnşa Sanayi A.Ş.
SAMSUN	
1	Terme Tersanesi A.Ş. (Terme-Samsun)
KASTAMONU	
1	Cide (Berk)Gemi ve Yat San. Tic. A.Ş
SAKARYA	
1	Gündoğdu Gemi Yan Sanayi ve Deniz Ltd. Şti
HATAY	
1	İster İsken. Liman ve Tersane İşlet. Ltd. Şti.
ADANA	
1	Akdeniz (Akbaşoğlu) Gemi İnşa

Source: Ministry of Transport, Maritime Affairs and Communications

TABLE (50): Shipyards Under Construction 2011

City	Shipyard Name
İSTANBUL	(Proje)
4	Dalsan Liman İnşaatı, Tarama, Gemicilik San.
YALOVA	
1	GÜRDESAN Gemi İnşa San.ve Tic.A.Ş.
2	HÜRRİYET Denizcilik San. ve Tic.Ltd. Şti.
3	ARKAS Denizcilik ve Nakliyat A.Ş.
4	YÜKSEL PROJE Uluslararası A.Ş.
5	FURTRANS Gemi İnşa ve Ters. Tic. Ve San. A.Ş.
6	MUSTAFA OKANOĞULLARI Gem. San.ve Tic.A.Ş.
7	MARDAŞ Marmara Deniz İşletmeciliği A.Ş.
8	AK İNŞAAT Mermercilik ve Tic. A.Ş.
9	PALHAN Tersanecilik San. ve Tic. Ltd. Şti.
10	Boğaziçi Denizcilik San. Tic. A.Ş.
11	BREKO Nieuwbouw II BV
12	ÖZLEM Tersanecilik Taşımacılık İnşaat San. ve Tic. Ltd.Şti.
13	Herçelik Deniz End. İç ve Dış Tic. Ltd.Şti.
14	CS DENİZCİLİK Nakliyat ve Ticaret Ltd.Şti.
15	Gemak Gemi İnşaat Sanayi ve Ticaret A.Ş.
16	Bosfor Gemi ve Yat İnşa San. Ve Tic Ltd. Şti.
17	SMS Gemi İnşa Sanayi A.Ş.
18	Bayrak Denizcilik Taşımacılık San. ve Tic. Ltd.
19	Yalova Gemi Tersanecilik Denizcilik Ltd.Şti.
20	ICT Yat Sanayi Tur.Tic.A.Ş.
TRABZON	
1	Nur Gemi İnşa A.Ş.
ORDU	
1	Çillioğlu Gemi San. Ulus. Nak. ve Tur. Ltd. Şti.
SAMSUN	
1	Atilla Mak. Mon. İzo. Taah. İnş. Tur. Nak. ve Tic. Ltd. Şti
2	C-M Denizcilik San. ve Tic. A.Ş.

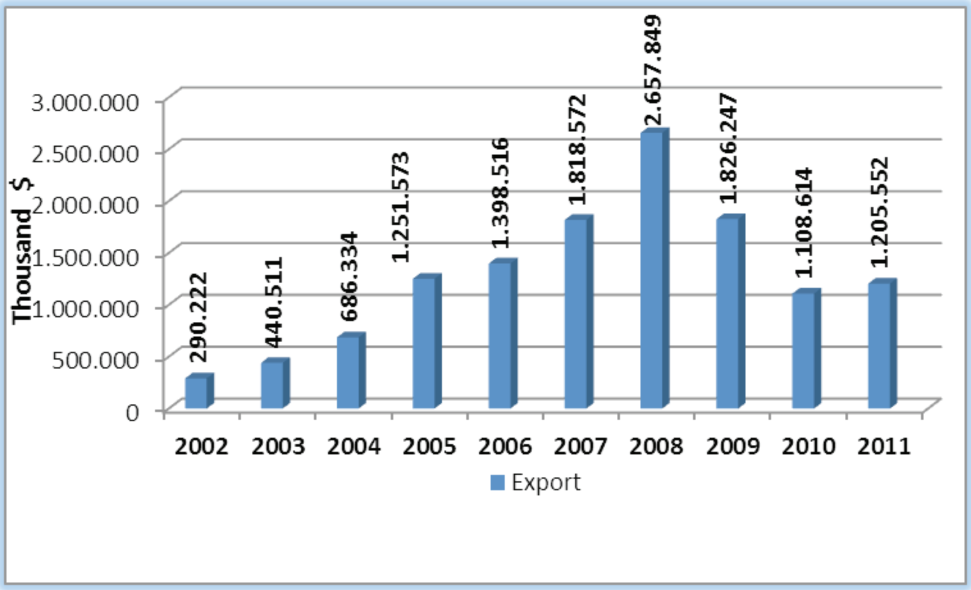
3	Kanlar Den. İnş. Nak. Gemi İnşa San. Tic. ve Ltd. Şti.
4	İhaleye çıkılacak Parsel
5	Samsun Tersanesi
6	MBB Denizcilik ve Gemi İnş. San. Tic. A.Ş.
7	Aksoylar Gıda San. ve Tic. Şti.
8	Çeltikçioğlu İnşaat San. ve Tic. Ltd. Şti.
9	Öktemler Denizcilik ve Gemi İnşaat San.
SİNOP	
1	Taşkınlar Tersanesi
KASTAMONU	
1	İnebolu Tersanesi
2	Art Gemi Sanayi
3	Çakırağa Gemi İnşa LTD.Şti.
ZONGULDAK	
1	Likoğlu Grup Gemi İnşa San.
2	İşler Gemi Acenteliği San. Ltd. Şti. Tersanesi
3	Demir Gemi Tersanesi San. ve Tic. Ltd. Şti.
4	Cansu deniz Nakliyat ve Gemi San. ve Tic. Ltd. Şti.
ÇANAKKALE	
1	Gülman Tersanesi
2	Zeytinoğlu Tersanesi
3	Bekirli Tersanesi
4	Gelibolu Gemi Endüstri Tersanesi
5	Eras-İçdaş Tersanesi
6	Pera Denizcilik Tersanesi
BALIKESİR	
1	Bandırma Gemi İnşa San. Tic. Ltd. Şti.
2	Kapıdağ Tersanesi
MERSİN	
1	Akter Akdeniz Taşucu Gemi İnşa San. A.Ş.
ADANA	
1	Tersan Tersanecilik
2	UGOD

Source: Ministry of Transport, Maritime Affairs and Communications

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

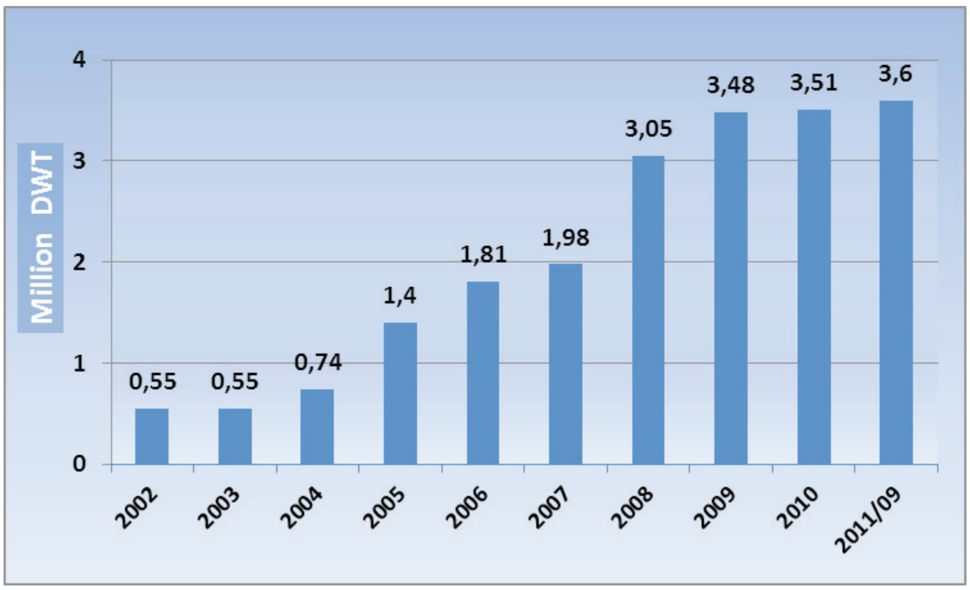
Most of the ships constructed in Turkish shipyards are being built for export. Especially between 2002-2009, almost the total amount of these ships exported to the EU member countries.

GRAPH (41): Export Figures of Turkish Shipbuilding Industry



Source: Turkish Shipbuilders' Association

GRAPH (42): Shipyards Project Capacities between 2002-2011

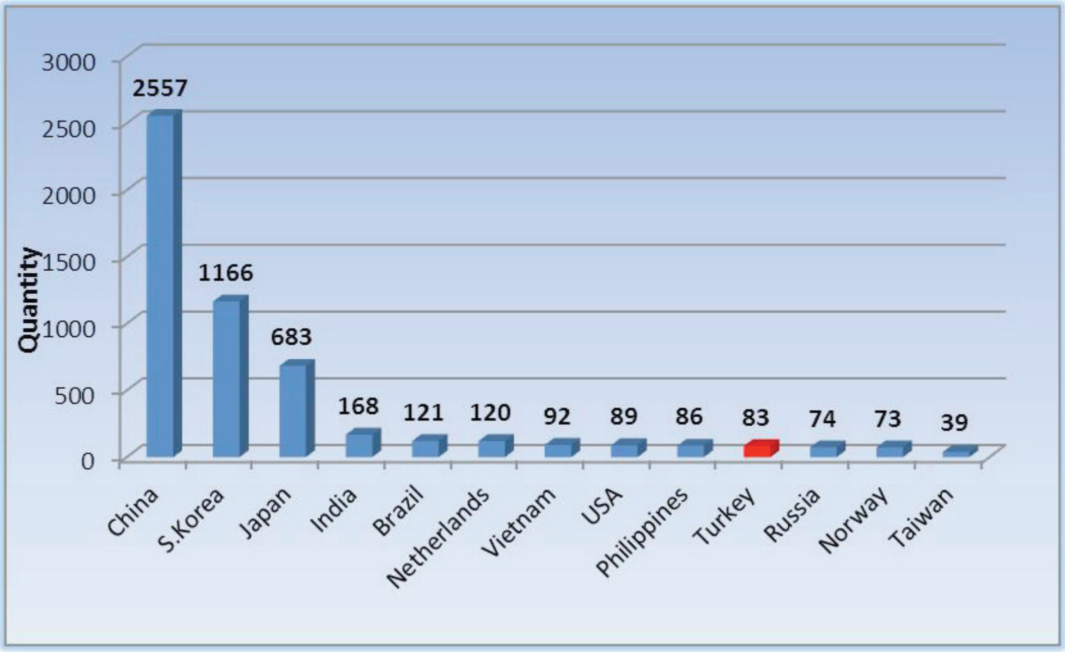


Source: Ministry of Transport, Maritime Affairs and Communications

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

By the end of 2011, orders in our yards was decreased to 0,7 Million DWT which was over 4 Million DWT in 2007.

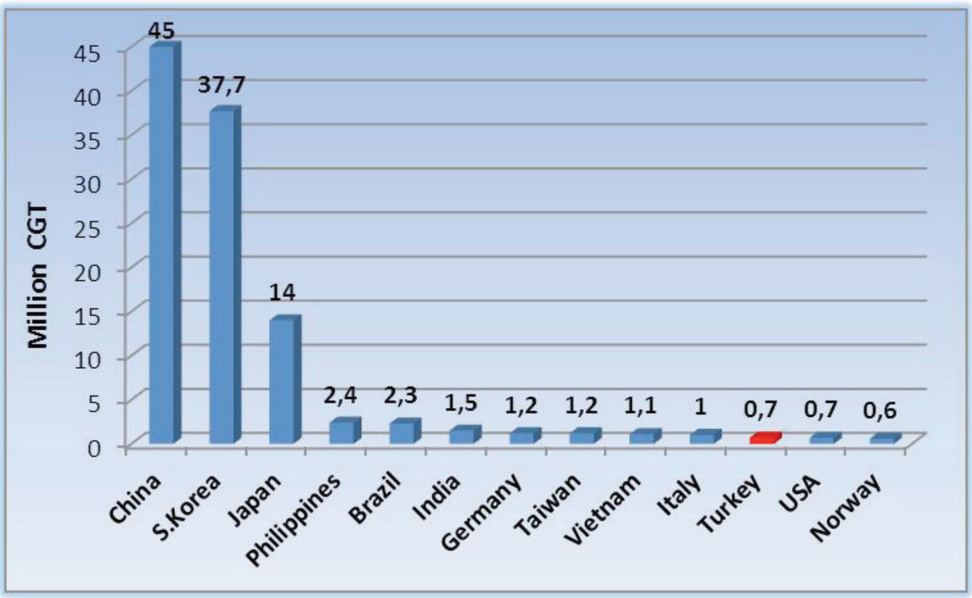
GRAPH (43): Orderbook by Builder Country (Quantity)



Source: Clarkson Research Services 01/2012

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

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

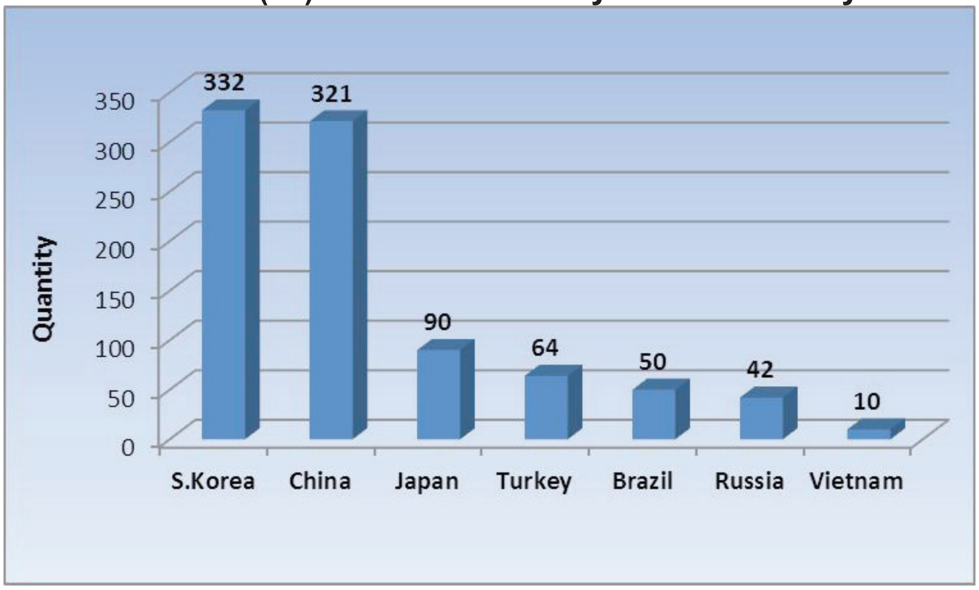


Source: Clarkson Research Services 01/2012

Turkish yards are in the 11th place of world orderbook ranking list according to tonnage basis in CGT.

Our shipyards have a good reputation in building of small and medium tonnage chemical tankers. By January 2012, Turkey was in the 4th place among the countries which takes tanker orders.

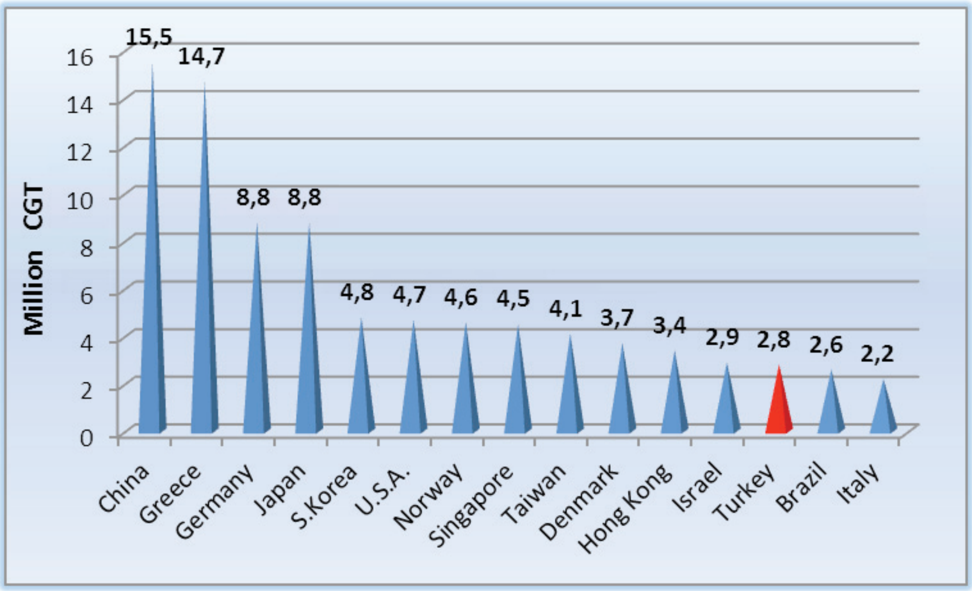
GRAPH (45) : Tanker Orders by Builder Country



Source: Clarkson Research Services 01/2012

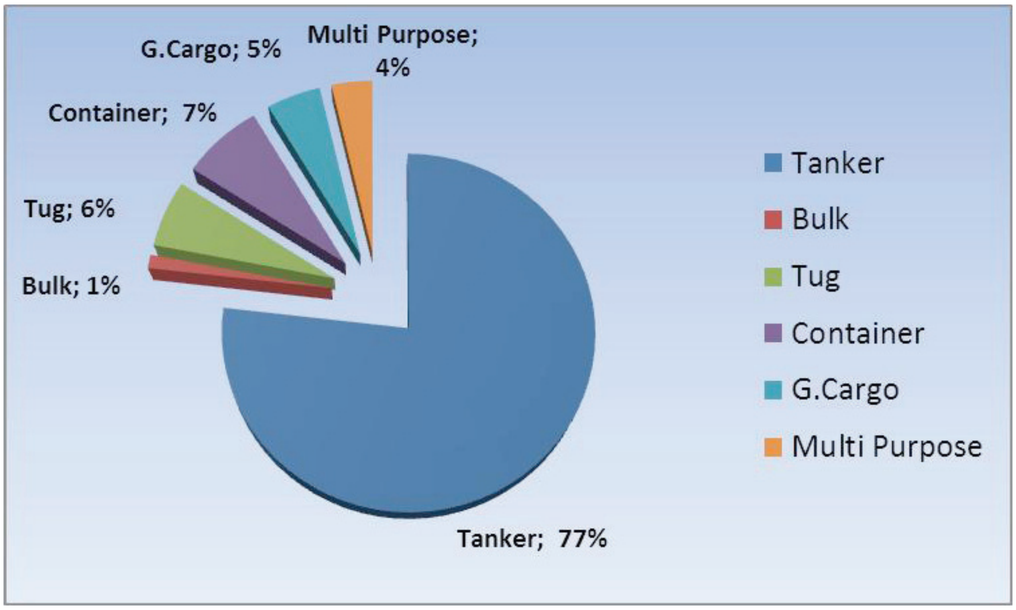
Turkish shipowners with their orders worldwide about 2,8 million CGT of 170 ships are in the 13 th place in world ranking.

GRAPH (46): Orderbooks by Owner Country



Source: Clarkson Research Services 01/2012

GRAPH (47): Distribution of Orders According to Shiptype



Source: Clarkson Research Services 02/2012

Yacht and Boat Building Industry

Yacht and boat building is one of the most important sectors with its high accretion value, high export ratio and it provides employment. This industry is combination of sectors in yards which deals with ironing, painting, electric, electronic textile, decoration etc.

Yacht and boat building industry is quite different from the shipbuilding because of its concept, scope and technology.In shipbuilding industry long term investments and big coastal areas are needed for production, but in boat & yacht building relatively less investments, areas and time are needed.Boat &yacht building comparatively do not need very big investments but has a big accretion value.

Turkey; with its beautiful coast, cultural and historical resources, has a great market potential not only for yachts but especially for mega-yacht tourism. Inclusion of mega-yacht mooring places to the projects which are planning to be constructed in Ataköy and Zeytinburnu,will be a great prestige and income for our marine tourism.

If we summarize the advantages of our boat&yacht building industry, the main positive aspects are;

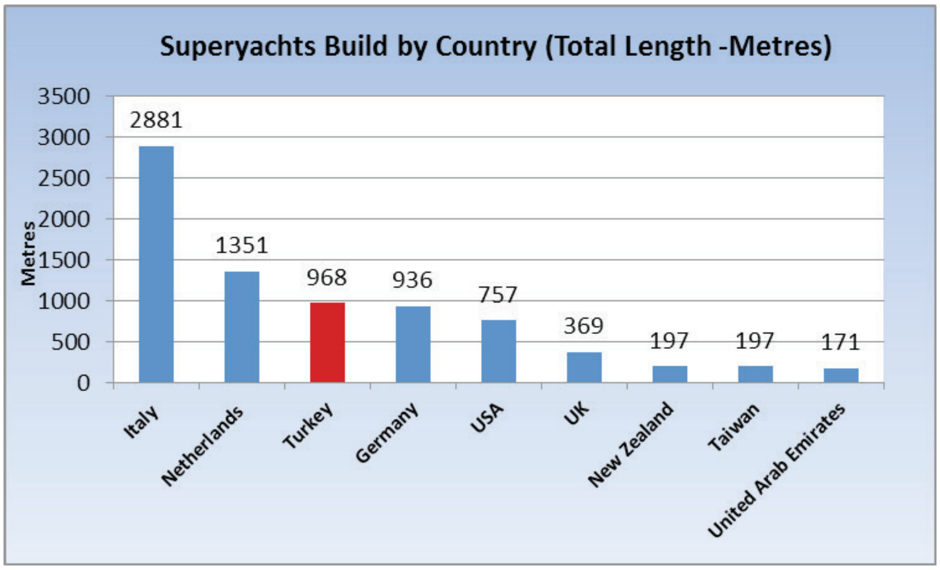
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to international markets
- Appropriate climate
- Our country’s potential in boat&yacht building

Main disadvantages are;

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

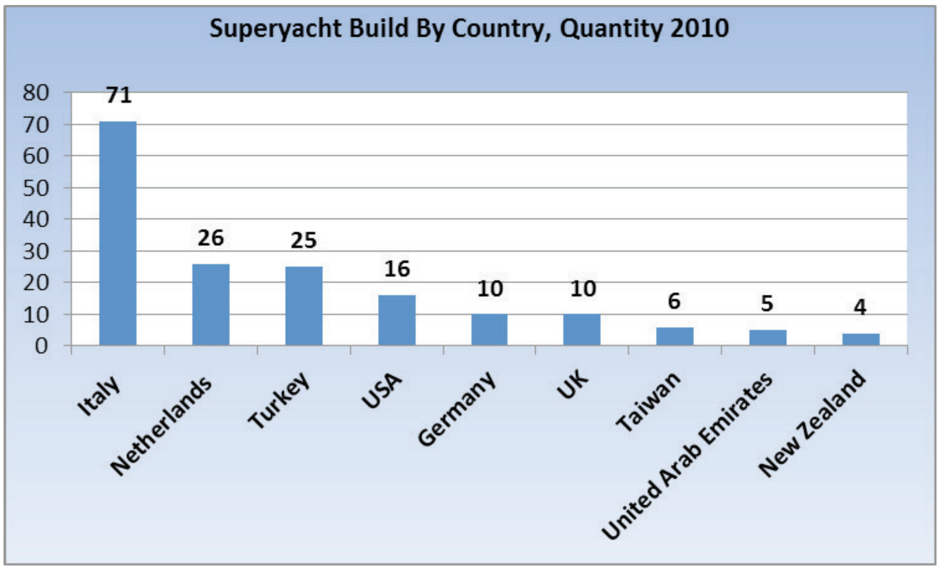
The 195 pieces of 30 metre & plus superyachts delivered in 2010 were built in 24 diffrent countries. Turkey is in the 3rd place with 25 superyachts with the total length of 968 metres which equals to 11,20% of market share.

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



Source:The Super Yachting Index- Fourth Edition July 2011

GRAPH (49): Superyachts Build by Country, Quantity 2010



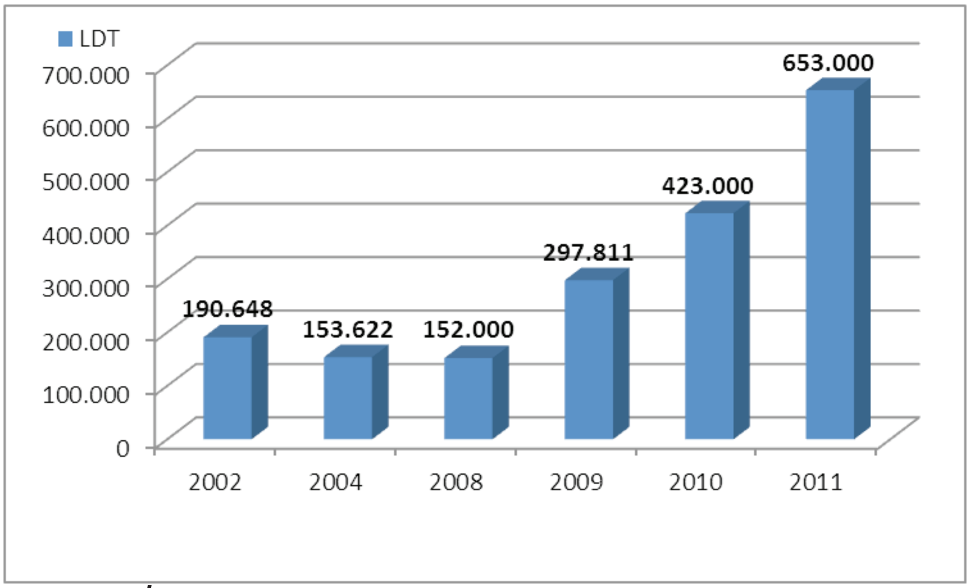
Source:The Super Yachting Index- Fourth Edition July 2011

Ship Breaking Industry

Aliağa region which is located in the city of İzmir, is in the leading position for ship breaking and recyling activities with 21 facilities. In 2009;

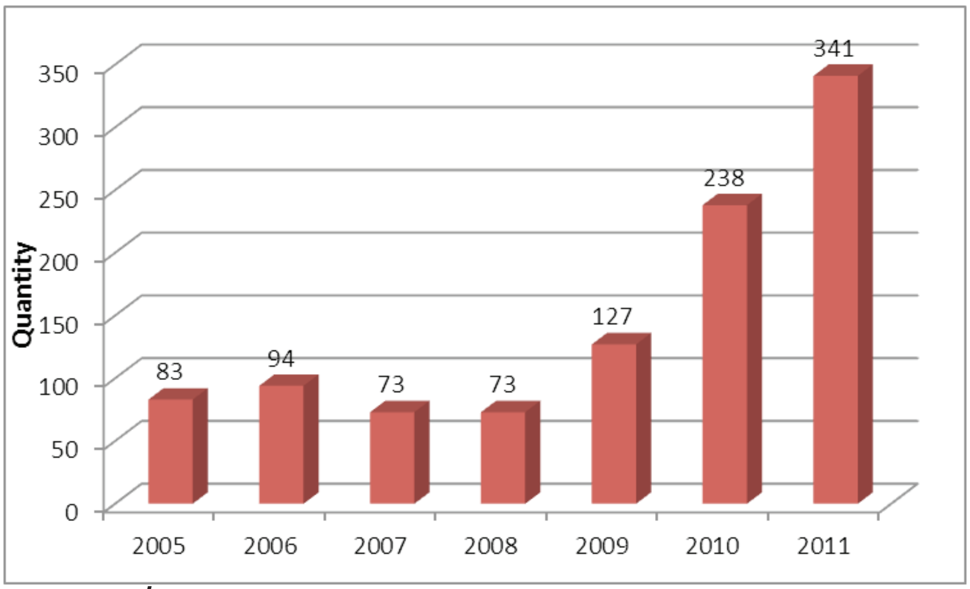
- Annual capacity is 900.000 LDT
- Max.Vessel Tonnage (Recyled) is 50.000 LDT
- Annual net scrap production 250.000 Tons

GRAPH (50): Recyled Vessels in LDT (2011)



Source: GEMİSANDER

GRAPH (51): Recyled Vessels in Quantity (2011)



Source: GEMİSANDER

By the effect of the new regulations, especially about the tankers, ship breaking in Turkey increased 69% in quantity, 64% in LDT when compared with the previous year.

Sub- Industry

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

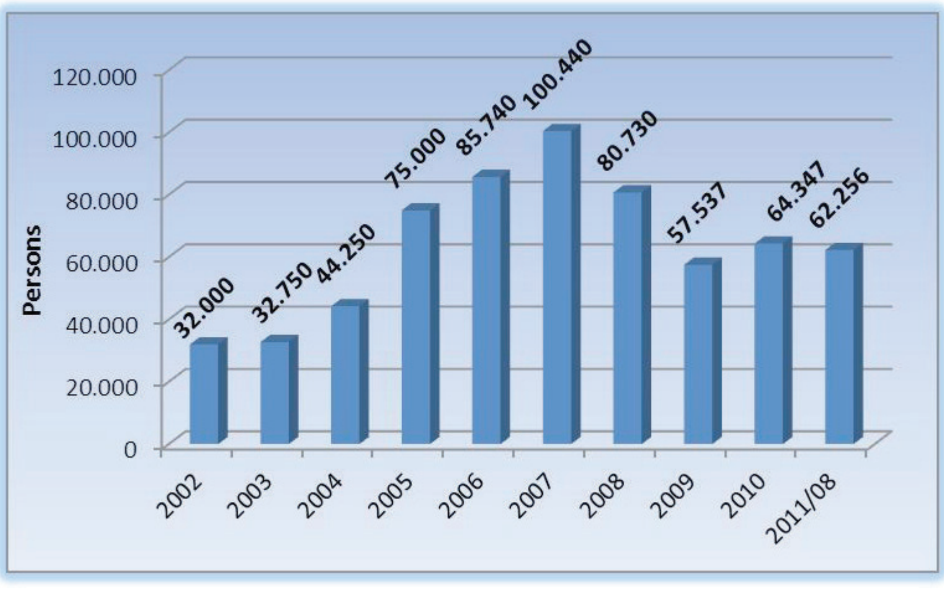
Turkish sub-industry regarded as one of the best in supplying anchor, chain, bollard, electric cables, hydrolic units but in electronic equipment especially in navigational systems due to their producer are a few basic worldwide, sector needs to obtain from import resources.Steel sheet production in Turkey can also meet the small amount of the requests.

Turkish Sub-industry is able to produce;
Anchor, chain, bollard, locking equipments - Windlass and equipments - Valves and Central heating Systems - Electric Panels and Tables - Fire Fighting Systems - Pumps - Isolation Equipments - Pipes – Refrigerated Units - Hatch Covers - Diesel generator – Boiler - Carpenter and furnishings.

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

Sub-industry creates employement as 1 to 3.In 2002 employement in sub-industry was 30.000 people and it raised to 103.500 but unfortunately due to the global economic crisis it decreased to 57.537 by the end of 2009.

GRAPH (52):Shipbuilding Sub-Industry Employement



Source: Ministry of Transport, Maritime Affairs and Communications

TABLE (51) : Orderbook of Turkish Shipyards as of February 2012

	Hull No.	Type	Dwt	GRT	Size	Unit	CGT	Delivery	Yard	Yard Status	Contract Date	Current Owner
1	H65	AHTS	1,9		10,876	HP	4,494	2012-03	Selah Shipyard	Established <2000	01.01.2011	Marnavi S.P.A.
2	A-04	Chem & Oil	5,5	3,3	5,5	DWT	7,235	2012-01	Unknown Yard /Turkey	Established <2000	01.07.2008	Akar Deniz Tasimac.
3	5	Chem & Oil	15,985	7,993	15,985	DWT	11,77	2012-	Duzgit Shipyard	Greenfield	01.06.2010	Duzgit Group
4	6	Chem & Oil	8,3		8,3	DWT	9,123	2012-	Duzgit Shipyard	Greenfield	01.07.2010	Duzgit Group
5	1	MPP	9,5	4,896	9,5	DWT	6,207	2012-	Akdeniz Gemi	Greenfield	01.07.2008	Akdeniz Gemi
6	36	Chem & Oil	38	22,495	38	DWT	20,793	2012-04	UM Deniz Shipyard	Established <2000	01.01.2007	Unknown
7	34	Container	10,6	8,97	917	TEU	9,261	2012-	UM Deniz Shipyard	Established <2000	01.04.2005	Volum Denizcilik
8	N/A	Chem & Oil	12,7		12,7	DWT	11,527	2013-06	Marmara Tersanesi	Established <2000	03.12.2010	Yilmar Shipping
9	N/A	Chem & Oil	8,5		8,5	DWT	9,243	2013-05	Marmara Tersanesi	Established <2000	03.12.2010	Yilmar Shipping
10	N/A	Chem & Oil	8,5		8,5	DWT	9,243	2013-10	Marmara Tersanesi	Established <2000	03.12.2010	Yilmar Shipping
11	N/A	GCargo	11		11	DWT	8,223	2013-03	Marmara Tersanesi	Established <2000	01.08.2008	Yilmar Shipping
12	N/A	GCargo	11		11	DWT	8,223	2013-05	Marmara Tersanesi	Established <2000	01.08.2008	Yilmar Shipping
13	N/A	Escort Tug	265	484	5,218	HP	2,125	2012-	Med Marine Towage	Established 2000-10	01.01.2010	Jadranski Pomorski
14	N/A	Harbour Tug			5	HP	1,891	2012-	Sanmar Ltd	Established <2000	01.09.2010	Seaspan Marine
15	N/A	Harbour Tug			5	HP	1,891	2012-	Sanmar Ltd	Established <2000	01.09.2010	Seaspan Marine
16	N/A	Harbour Tug			5	HP	1,891	2012-	Sanmar Ltd	Established <2000	01.09.2010	Seaspan Marine
17	9	Chem & Oil	7,064	4,812	7,064	DWT	8,903	2012-	Soli Shipyard	Established 2000-10	01.11.2007	Unknown Turkish
18	28	GCargo	7,5		7,5	DWT	6,486	2012-01	Karadeniz Shipyd.	Established 2000-10	01.03.2009	Unknown
19	3	GCargo	3		3	DWT	3,608	2012-01	Kocatepe S/Y	Established <2000	01.02.2009	Royal Amasus Hansen
20	217	Chem & Oil	7,6	5,128	7,6	DWT	9,22	2012-01	Anadolu Shipyard	Established <2000	01.12.2008	Anadolu Kim. Tanker.
21	221	Chem & Oil	6	3,954	6	DWT	7,992	2012-	Anadolu Shipyard	Established <2000	01.07.2008	Anadolu Kim. Tanker.
22	16	Products	7,05	4,681	7,05	DWT	5,934	2012-02	Besiktas Shipyard	Established 2000-10	28.10.2009	Palmali Shipping

23	17	Products	7,05	4,681	7,05	DWT	5,934	2012-06	Besiktas Shipyard	Established 2000-10	28.10.2009	Palmali Shipping
24	18	Products	7,05	4,681	7,05	DWT	5,934	2012-07	Besiktas Shipyard	Established 2000-10	28.10.2009	Palmali Shipping
25	19	Products	7,05	4,681	7,05	DWT	5,934	2012-10	Besiktas Shipyard	Established 2000-10	28.10.2009	Palmali Shipping
26	49	Bulk	24,968	16	24,968	DWT	10,639	2012-03	Cicek Shipyard	Established <2000	01.10.2008	Deniz Endustrisi
27	15	Chem & Oil	6,4		6,4	DWT	7,907	2012-01	Icdas Shipyard	Established 2000-10	01.09.2007	Icdas Celik Enerji
28	16	Chem & Oil	6,4		6,4	DWT	7,907	2012-03	Icdas Shipyard	Established 2000-10	01.09.2007	Icdas Celik Enerji
29	17	Chem & Oil	6,4		6,4	DWT	7,907	2012-05	Icdas Shipyard	Established 2000-10	01.09.2007	Icdas Celik Enerji
30	18	Chem & Oil	6,4		6,4	DWT	7,907	2012-07	Icdas Shipyard	Established 2000-10	01.09.2007	Icdas Celik Enerji
31	1	Chem & Oil	6,4	4,1	6,4	DWT	8,153	2012-	Unknown Yard /Turkey	Established <2000	01.07.2007	Den-Ta Denizcilik
32	68	Chem & Oil	13,5		13,5	DWT	11,921	2012-	Yardimci Deniz	Established <2000	01.04.2008	Yardimci Shpg. Group
33	37	MPP	9,7	7,5	9,7	DWT	8,155	2012-04	Madenci S/Y	Established <2000	01.07.2005	Unknown
34	118	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2012-01	Selay Shipyard	Established 2000-10	01.01.2006	Selay Deniz. Sanayi
35	119	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2012-03	Selay Shipyard	Established 2000-10	01.07.2007	Selay Deniz. Sanayi
36	120	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2012-05	Selay Shipyard	Established 2000-10	01.07.2007	Selay Deniz. Sanayi
37	121	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2012-07	Selay Shipyard	Established 2000-10	01.07.2007	Selay Deniz. Sanayi
38	122	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2012-09	Selay Shipyard	Established 2000-10	01.07.2007	Selay Deniz. Sanayi
39	123	Chem & Oil	6,25	4,236	6,25	DWT	8,301	2012-11	Selay Shipyard	Established 2000-10	01.07.2007	Selay Deniz. Sanayi
40	128	Chem & Oil	3		3	DWT	5,213	2012-	Selay Shipyard	Established 2000-10	01.09.2007	Selay Deniz. Sanayi
41	129	Chem & Oil	3		3	DWT	5,213	2012-	Selay Shipyard	Established 2000-10	01.09.2007	Selay Deniz. Sanayi
42	130	Chem & Oil	3		3	DWT	5,213	2012-	Selay Shipyard	Established 2000-10	01.09.2007	Selay Deniz. Sanayi

43	131	Chem & Oil	3		3	DWT	5,213	2012-	Selay Shipyard	Established 2000-10	01.09.2007	Selay Deniz. Sanayi
44	77	Chem & Oil	4,999	3,308	4,999	DWT	7,245	2012-01	Yardimci Deniz	Established <2000	01.10.2007	Yardimci Shpg. Group
45	55	Container	12,5	9,5	1	TEU	9,63	2012-04	Yardimci Deniz	Established <2000	01.07.2006	Yardimci Shpg. Group
46	56	Container	12,5	9,5	1	TEU	9,63	2012-04	Yardimci Deniz	Established <2000	01.07.2006	Yardimci Shpg. Group
47	26	Chem & Oil	6,48	4,242	6,48	DWT	8,307	2012-07	Desan Deniz	Established <2000	30.11.2007	Kaptanoglu Shpg. Grp
48	42	Chem & Oil	6,824	4,859	6,824	DWT	8,951	2012-01	Tuzla Gemi	Established <2000	01.01.2006	Unknown
49	87	Chem & Oil	5,6	3,583	5,6	DWT	7,57	2012-01	Celiktekne	Established <2000	01.10.2007	KGS Denizcilik
50	88	Chem & Oil	5,6	3,583	5,6	DWT	7,57	2012-03	Celiktekne	Established <2000	01.10.2007	KGS Denizcilik
51	75	Chem & Oil	9		9	DWT	9,538	2012-01	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
52	76	Chem & Oil	9		9	DWT	9,538	2012-03	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
53	77	Chem & Oil	9		9	DWT	9,538	2012-05	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
54	78	Chem & Oil	9		9	DWT	9,538	2012-07	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
55	79	Chem & Oil	9		9	DWT	9,538	2012-09	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
56	80	Chem & Oil	9		9	DWT	9,538	2012-11	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
57	81	Chem & Oil	9		9	DWT	9,538	2013-01	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
58	82	Chem & Oil	9		9	DWT	9,538	2013-03	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
59	83	Chem & Oil	9		9	DWT	9,538	2013-05	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
60	84	Chem & Oil	9		9	DWT	9,538	2013-07	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
61	85	Chem & Oil	9		9	DWT	9,538	2013-09	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
62	86	Chem & Oil	9		9	DWT	9,538	2013-11	Celiktekne	Established <2000	01.10.2007	FORS Denizcilik
63	63	Chem & Oil	6,138	3,999	6,138	DWT	8,042	2012-01	Torlak Shipyard	Established <2000	01.09.2007	MRC Shipping
64	17	Chem & Oil	12		12	DWT	11,173	2012-01	Aykin Deniz.	Established <2000	01.09.2007	MRC Shipping
65	18	Chem & Oil	12		12	DWT	11,173	2012-08	Aykin Deniz.	Established <2000	01.09.2007	MRC Shipping
66	59	Chem & Oil	16,745	12,137	16,745	DWT	14,81	2012-01	Turkter-Tersane	Established 2000-10	01.09.2007	Yardimci Shpg. Group
67	2052	Chem & Oil	11,259	7,321	11,259	DWT	11,215	2012-	Dearsan Shipyd.	Established <2000	01.07.2007	Yardimci Shpg. Group
68	2061	Chem & Oil	11,259	7,321	11,259	DWT	11,215	2012-01	Dearsan Shipyd.	Established <2000	01.07.2007	Yardimci Shpg. Group
69	26	Chem & Oil	5,3		5,3	DWT	7,413	2012-04	Eregli Shipyard	Established <2000	12.10.2007	John T. Essberger
70	80	Chem & Oil	12,5		12,5	DWT	11,427	2012-05	Marmara Tersanesi	Established <2000	01.08.2007	Yildirim Group

71	81	Chem & Oil	12,5		12,5	DWT	11,427	2012-10	Marmara Tersanesi	Established <2000	01.08.2007	Yildirim Group
72	36	MPP	9,7	7,5	9,7	DWT	8,155	2012-01	Madenci S/Y	Established <2000	01.07.2005	Unknown
73	10	Chem & Oil	25	17,514	25	DWT	18,119	2012-	Eregli Shipyard	Established <2000	01.01.2007	Med Marine
74	9	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2012-01	Eregli Shipyard	Established <2000	01.01.2007	Med Marine
75	20	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2012-03	Eregli Shipyard	Established <2000	01.01.2007	Med Marine
76	30	Chem & Oil	8,28	5,651	8,28	DWT	9,726	2012-01	Eregli Shipyard	Established <2000	01.01.2007	Med Marine
77	156	Container	26,811	21,092	1,878	TEU	16,564	2012-01	Sedef Gemi End.	Established <2000	01.12.2006	Kasif Kalkavan Group
78	157	Container	26,811	21,092	1,878	TEU	16,564	2012-01	Sedef Gemi End.	Established <2000	01.12.2006	Kasif Kalkavan Group
79	19	Chem & Oil	25	17,712	25	DWT	18,232	2012-01	Admarin Shipyard	Established 2000-10	01.07.2007	Galata Denizcilik
80	90	Chem & Oil	4,9		4,9	DWT	6,827	2012-01	Ustaoglu Shipyard	Established <2000	01.01.2006	Tanmarin Denizcilik
81	N/A	Chem & Oil	4,9		4,9	DWT	6,827	2012-04	Ustaoglu Shipyard	Established <2000	01.01.2006	Tanmarin Denizcilik
82	35	Container	10,6	8,97	917	TEU	9,261	2012-	UM Deniz Shipyard	Established <2000	01.04.2005	Volum Denizcilik

Source: Clarkson Research Ser. 02/2012

PORTS

CHAPTER IV

PORT DEVELOPMENTS

Ports Information in General

The coastline of Anatolia is 8333 Km long. Total numbers of ports are 175 along the coastline. 6 ports are operated by Turkish Maritime Administrations and 4 out of 7 railway connected ports are operated by Turkish State Railways.

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

ANTALYA REGION	**7 PORTS**
ÇANAKKALE REGION	**24 PORTS**
İSTANBUL REGION	**79 PORTS**
İZMIR REGION	**22 PORTS**
MERSİN REGION	**18 PORTS**
SAMSUN REGION	**16 PORTS**
TRABZON REGION	**9 PORTS**

and operated by;

GOVERNMENT	**22 PORTS**
MUNICIPALITY	**27 PORTS**
PRIVATE	**126 PORTS**

The major part of international trade is being realized through maritime transportation in Turkey. Approximately 90 % of goods (import-export) have been maritime transported in 2011

Theoretical capacity of Turkish ports are as below;

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

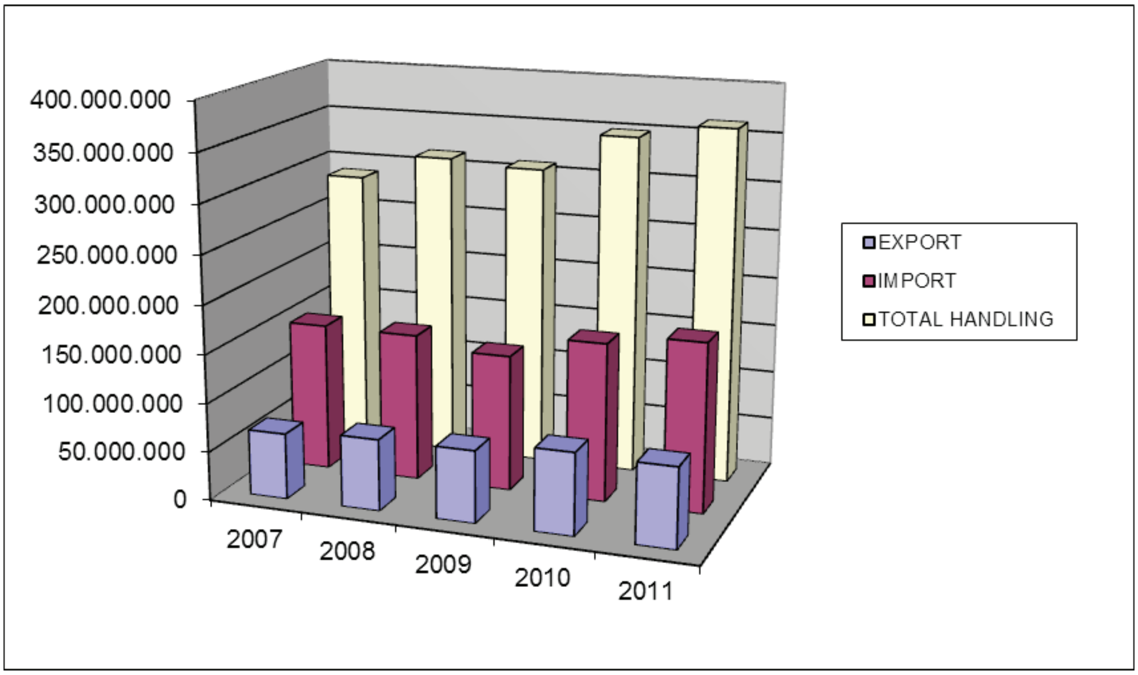
Table below shows total cargo handled at Turkish ports according to type of transportation in the last five years.

TABLE (52): Cargo Handling Figures At Turkish Ports (Acc. to Transport Mode)

MODE OF TRANSPORT		2007	2008	2009	2010	2011
EXPORT	TURKISH	9.761.897	10.654.742	9.578.520	11.615.686	12.273.915
	FOREIGN	57.835.842	62.590.230	64.191.743	72.329.476	69.502.777
	TOTAL	**67.597.739**	**73.244.972**	**73.770.263**	**83.945.162**	**81.776.692**
IMPORT	TURKISH	27.003.125	21.136.641	20.387.046	28.878.432	30.120.033
	FOREIGN	125.310.476	130.394.670	119.475.045	133.747.337	143.426.365
	TOTAL	**152.313.601**	**151.531.311**	**139.862.090**	**162.625.769**	**173.546.398**
CABOTAGE	LOADING	16.364.074	18.922.148	18.305.867	18.561.807	21.257.193
	UNLOADING	18.741.552	20.134.058	19.485.900	19.434.485	22.387.290
	TOTAL	**35.105.626**	**39.056.206**	**37.791.767**	**37.996.292**	**43.644.483**
TRANSIT	LOADING	30.593.600	50.744.950	58.012.586	58.767.061	58.603.055
	UNLOADING	2.473.350	-	-	5.355.657	5.776.095
	TOTAL	**33.066.950**	**50.744.950**	**58.012.586**	**64.122.718**	**64.379.150**
GR.TOTAL	LOADING	114.555.413	142.912.070	150.088.716	161.274.030	161.636.940
	UNLOADING	173.528.503	171.665.369	159.347.990	187.415.911	201.709.783
	TOTAL	**288.083.916**	**314.577.439**	**309.436.706**	**348.689.941**	**363.346.723**

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

GRAPH 53: Cargo Handling Figures According To Years



The goal of Turkey is to become a centre for transit cargoes in the region. The strategical position of Turkey is increasing after the pipe lines like Baku-Tiflis-Ceyhan, and projects like Nabucco Gas Pipeline and South East Anatolia Project (GAP). Privatized and modernized ports will also add strength to its position.

The major problems beyond the insufficient ratio of transit cargo movements, are disharmony to technological developments and insufficient railway integrations to ports that will supply cargoes to be distributed fast and on time.

363.346.723 tons of cargo is realized at Turkish ports in 2011.

- 22,5 % of handling is export with 81.776.692 tons.
- 47,8 % of handling is import with 173.546.398 tons.
- 12 % of handling is cabotage with 43.644.483 tons.
- 17,7 % of handling is transit with 64.379.150 tons.

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

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

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

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

Port/Facility	Type of Cargo	Existing Capacity	End of Project
Borusan Lojistik	Container	400,000 TEU	650,000 TEU (2015)
	General Cargo	5,000,000 Tons	6,500,000 Tons (2015)
Delta Petrol	Liquid	612,500 m³	1,000,000 m³ (2012)
Ege Gübre	Container	400,000 TEU	600,000 TEU
Evyap	Container	600,000 TEU	1,200,000 TEU (2015)
Gemport	Container	350,000 TEU	600,000 TEU (2011)
Mersin	Container	850,000 TEU	1,700,000 TEU (2012)
İsdemir	Container	-	2,200,000 TEU (2015)
Toros Tarım (Ceyhan)	General Cargo	15,000,000 Tons	25,000,000 Tons
	Liquid Bulk Cargo	235,000 m³	1,500,000 m³
Toros Tarım (Samsun)	Solid Bulk/ General Cargo	3,300,000 Tons	8,500,000 Tons
Yılport	Container	450,000 TEU	2,500,000 TEU (2015)
	General Cargo	2,500,000 Tons	4,000,000 Tons
	Liquid	500,000 m³	1,000,000 m³ (2015)
Asya Port	Container	-	1,900,000 TEU (2013)
Aksa	General Cargo	-	4,000,000 Tons
DP World	Container	-	1,300,000 TEU
Solventaş	Liquid	4,000,000 m³	5,000,000 m³ (2014)
Derince	Container	-	250,000 TEU
Batıçim	Container	-	300,000 TEU (2015)
	General Cargo	6,000,000 Tons	7,500,000 Tons (2015)
İgsaş	General Cargo	2,000,000 Tons	2,500,000 Tons (2015)
Altıntel	General Cargo	1,000,000 Tons	5,000,000 Tons (2105)
	Liquid	1,500,000 m³	6,000,000 m³ (2015)
Roda	Container	120,000 TEU	200,000 TEU (2012)
	General Cargo	2,000,000 Tons	2,500,000 Tons (2012)
İzmir Alsancak	Container	750,000 TEU	2,100,000 TEU (2020)

Additional capacity increase and new port investments generally aim at 2015. In case of realization of these targets Turkey's existing 11.1 million TEU capacity is expected to reach 21.6 million TEU by 2015 with an increase of 10.5 million TEU. Parallel to cargo increase most investments are planned in the Marmara Region (6,7 million TEU), followed by the Mediterranean (2,2 million TEU) and the Aegean Sea (1,6 million TEU).

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

Turkish ports should go into an expertising process on certain types of cargoes and/or new port projects for container handling so as to become more competitive in the Mediterranean and Black Sea markets. Recently private container terminals increased specially in the Marmara Region.

Turkish ports hold stratejic position within the Eastern Mediterranean and Black Sea Shipping Lines and at the intersection point of East-West and North-South directional international transport corridors. They are in an advantageous position to attract transshipment/transit cargoes. Ports in all regions of Turkey are so located that they can serve to different transportation nets. The Mediterranean and Aegean Sea ports are located with little miss distance and have ability to attract Asian-European main shipping lines' cargoes passing through the Mediterranean. Specially, the Mediterranean ports are in a position to operate as transshipment/transit ports for delivering cargoes coming from main shipping lines to Middle East and Central Asian countries. Meanwhile Ports in the Marmara Region are important in terms of Turkish connection of Trans-European and Pan-European transport corridors formed by EU and extending those corridors to East. As a result of growing trade and transport volume in Black Sea which is the most important means of access for trading among the landlocked Central Asian countries with Europe, the importance of our ports in the area have increased.

TABLE (53):Handling Figures of Turklim Member Ports TCDD Ports And Others

CONTAINER (TEUS)

	2007	%	2008	%	2009	%	2010	%	2011	%
TURKLIM Members	3.389.876	72,13%	3.964.373	75,83%	3.485.468	77,10%	4.932.869	84,1%	5.679.049	85,88%
TCDD Ports	1.299.308	27,65%	1.241.640	23,75%	1.014.261	22,43%	904.258	15,42%	897.036	13,56%
Others	10.345	0,22%	22.141	0,42%	21.057	0,47%	28.658	0,48%	36.950	0,56%
TOTAL	4.699.529	100,00%	5.228.154	100,00%	4.520.786	100,00%	5.865.785	100,00%	6.613.035	100,00%

GENERAL AND BULK CARGO (TON)

	2007	%	2008	%	2009	%	2010	%	2011	%
TURKLIM Members	61.365.612	66,66%	64.782.826	67,61%	61.970.360	88,19%	73.829.860	72,52%	76.690.158	92,83%
TCDD Ports	7.576.826	8,23%	7.073.936	7,37%	5.449.558	7,76%	7.277.001	7,15%	5.922.616	7,17%
Others (×)	23.114.992	25,11%	24.110.277	25,12%	2.845.898	4,05%	20.705.912	20,33%		0,00%
TOTAL	92.057.430	100,00%	99.670.340	100,00%	76.053.292	100,00%	101.812.773	100%	82.612.774	100%

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

LIQUID CARGO (TON)

	2007	%	2008	%	2009	%	2010	%	2011	%
TURKLIM Members	12.306.397	91,37%	10.988.112	71,70%	12.675.876	90,07%	14.040.662	88,92%	12.791.433	92,52%
TCDD Ports	1.161.891	8,63%	1.220.516	7,25%	1.109.185	7,88%	981.683	6,22%	1.033.477	7,48%
Others (×)			3.226.768	21,06%	288.789	2,05%	767.080	4,86%		0,00%
TOTAL	13.468.288	100,00%	15.435.396	100,00%	14.073.850	100,00%	15.789.425	100,00%	13.824.910	100,00%

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

VEHICLE

TURKLIM Members	CONS. EQ	BUS	TRUCK	CAR	OTHER	TOTAL
2007	371	380	208.134	643.885	2	852.772
2008	364	411	262.294	671.343	23.999	958.411
2009	783	243	256.879	646.470	36.806	941.181
2010	2.543	0	531.472	844.243	57.819	1.436.077
2011	2.440	1.780	646.563	904.373	56.035	1.611.191

Source: TURKLIM

TDI Ports and Privatizations

TABLE (54): The Ports Operated By Turkish Maritime Administrations (TDİ)						
PORTS	PIER LENGTH (Meters)	DEPTH (Meters)	HANDLING CAPACITY (000x ton/year)	SHIP CAPACITY (number/years)	STORAGE CAPACITY (000x ton/year)	PASSANGER CAPACITY (person/years)
İSTANBUL	1.386,00	(-8,-12)	-	3.950	-	3.860.000
ÇANAKKALE	90,00	(-6,-7)	300	365	-	110.000
LAPSEKİ	106,00	(-6,-8)	100	100	10	-
KABATEPE	295,00	(-4,-5)	-	365	-	90.000
GÖKÇEADA (Port of Kuzu)	900,00	(-6,-7)	400	700	200	200.000
GÖKÇEADA (Uğurlu Pier)	76,00	(-6,-8)	-	365	-	-
TOTAL	**2.853,00**		**800**	**5.845**	**210**	**4.260.000**

Source: TDI

- In 1997, Ports of Tekirdağ, Rize, Ordu, Sinop, Giresun and Hopa
- In 1998, Port of Antalya,
- In 2000, Ports of Marmaris and Alanya
- In 2003, Ports of Çeşme, Kuşadası, Trabzon and Dikili,

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

TCDD Ports and Privatizations

Table 55: Specifications and Capacities of TCDD Ports

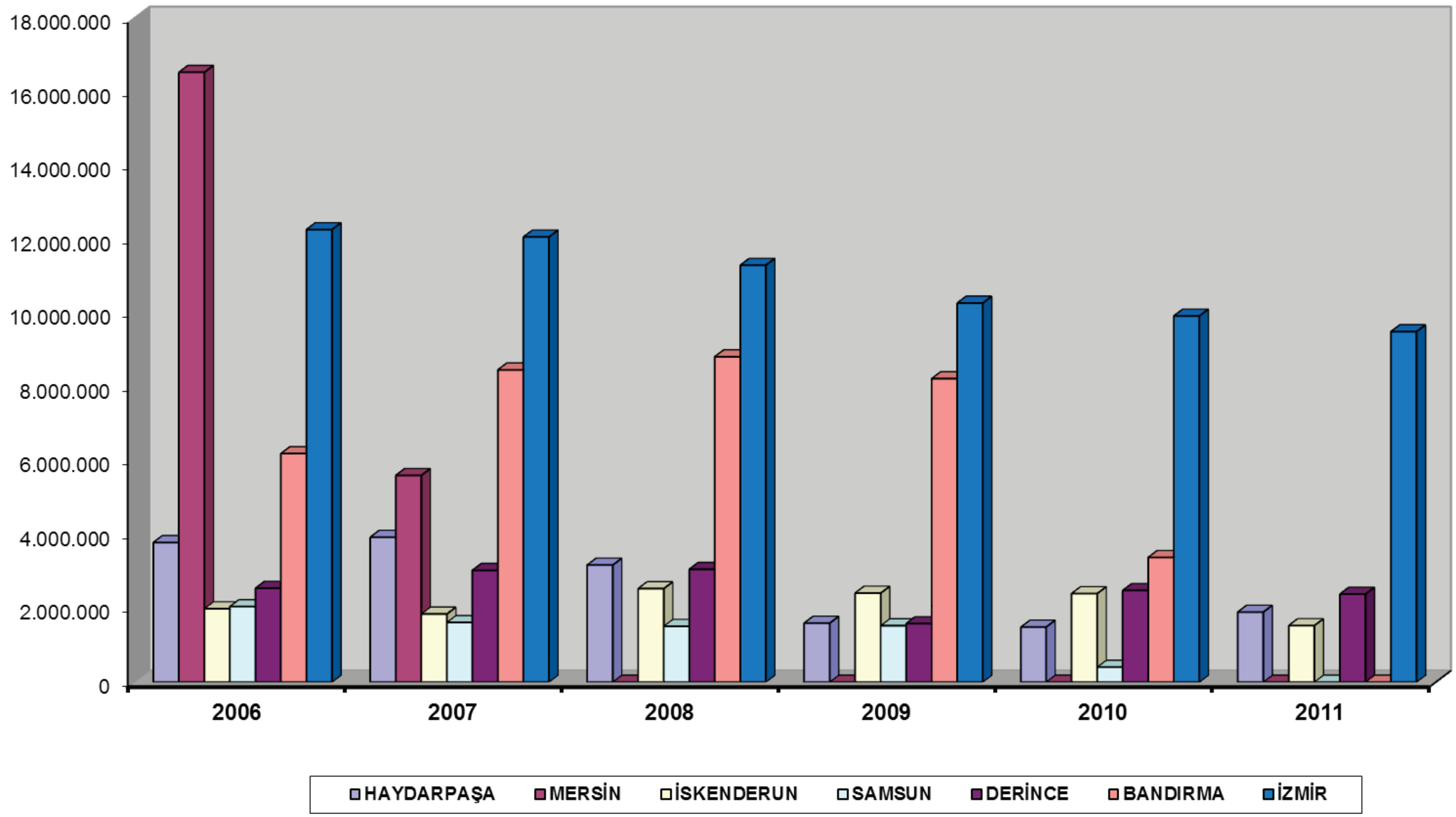
Ports	Total Wharf Length (m)	Port Area (*1000 m2)	Max. Draught (m)	Number of Workers	Total Ship Receipt (Ship/Year)	Total Handling Capacity (*1000 Tons/Year)	Total Wharf Capacity (*1000 Tons/Year)	Capacity of Container Wharf Equipment (*1000 TEU)	Storage Capacity (*1000 Tons/Year)	
									General Cargo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

Source: TCDD

TABLE (56): TCDD Ports 2006-2011 Handling Figures Acc. To Cargo Groups						
PORT	**YEAR**	**GENERAL CARGO**	**CONTAINER**	**DRY BULK**	**LIQUID BULK**	**TOTAL**
HAYDARPAŞA	2006	74.091	3.711.503	0	0	3.785.594
HAYDARPAŞA	2007	650.820	3.277.365	0	0	3.928.185
HAYDARPAŞA	2008	40.559	3.132.790	0	0	3.173.349
HAYDARPAŞA	2009	40.136	1.557.784	0	0	1.597.920
HAYDARPAŞA	2010	31.684	1.435.678	24499	0	1.491.861
HAYDARPAŞA	2011	297.365	1.600.626	0	0	1.897.991
MERSİN	2006	1.276.260	7.181.091	2.971.386	5.105.014	16.533.751
MERSİN	2007	378.177	2.428.451	1.273.370	1.524.534	5.604.532
MERSİN	2008	0	0	0	0	0
MERSİN	2009	0	0	0	0	0
MERSİN	2010	0	0	0	0	0
MERSİN	2011	0	0	0	0	0
İSKENDERUN	2006	241.133	0	842.284	905.051	1.988.468
İSKENDERUN	2007	368.151	1.021	607.619	869.947	1.846.738
İSKENDERUN	2008	775.363	0	996.755	763.138	2.535.256
İSKENDERUN	2009	730.671	0	827.299	855.373	2.413.343
İSKENDERUN	2010	793.774	689	823.830	782.213	2.400.506
İSKENDERUN	2011	485.202	0	325.688	721.856	1.532.746
SAMSUN	2006	879.027	0	1.149.035	18.229	2.046.291
SAMSUN	2007	896.596	0	688.703	31.006	1.616.305
SAMSUN	2008	797.021	0	661.990	54.100	1.513.111
SAMSUN	2009	705.281	3.440	787.266	33.019	1.529.006
SAMSUN	2010	187.930	794	209.691	6.230	404.645
SAMSUN	2011	0	0	0	0	0
DERİNCE	2006	1.374.072	4.915	1.073.113	92.662	2.544.762
DERİNCE	2007	1.734.764	3.603	1.215.897	76.772	3.031.036
DERİNCE	2008	1.966.399	3.178	983.982	104.789	3.058.348
DERİNCE	2009	964.081	2.370	570.856	49.410	1.586.717
DERİNCE	2010	1.071.481	6.214	1.356.534	51.031	2.485.260
DERİNCE	2011	1.264.824	10.143	1.005.367	106.203	2.386.537
BANDIRMA	2006	4.348.701	0	1.733.899	113.531	6.196.131
BANDIRMA	2007	5.557.147	156	2.768.107	139.433	8.464.843
BANDIRMA	2008	5.719.067	508	2.875.799	226.746	8.822.120
BANDIRMA	2009	5.787.476	175	2.232.264	206.894	8.226.809
BANDIRMA	2010	2.177.071	0	1.113.763	90.500	3.381.334
BANDIRMA	2011	0	0	0	0	0
İZMİR	2006	586.881	8.274.042	3.044.234	364.776	12.269.933
İZMİR	2007	692.052	8.858.429	2.304.523	213.172	12.068.176
İZMİR	2008	717.219	8.750.429	1.593.619	242.589	11.303.856
İZMİR	2009	379.198	7.751.632	1.942.878	204.402	10.278.110
İZMİR	2010	485.805	6.995.792	2.296.522	148.439	9.926.558
İZMİR	2011	523.849	6.754.509	2.020.321	205.418	9.504.097
TOTAL	2006	8.780.165	19.171.551	10.813.951	6.599.263	45.364.930
TOTAL	2007	10.277.707	14.569.025	8.858.219	2.854.864	36.559.815
TOTAL	2008	10.015.628	11.886.905	7.112.145	1.391.362	30.406.040
TOTAL	2009	8.606.843	9.315.401	6.360.563	1.349.098	25.631.905
TOTAL	2010	4.747.745	8.439.167	5.824.839	1.078.413	20.090.164
TOTAL	2011	2.571.240	8.365.278	3.351.376	1.033.477	15.321.371

** Mersin Port 2007 Tonnage is till end of April*
** Samsun Port 2010 Tonnage is till end of March*
** Bandırma Port was handed over to Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş. on 18.05.2010.*

GRAPH (54): TCDD Ports 2006 – 2011 Handling Figures



GRAPH (55): 2011 TCDD Ports Handling Acc. To Cargo Groups

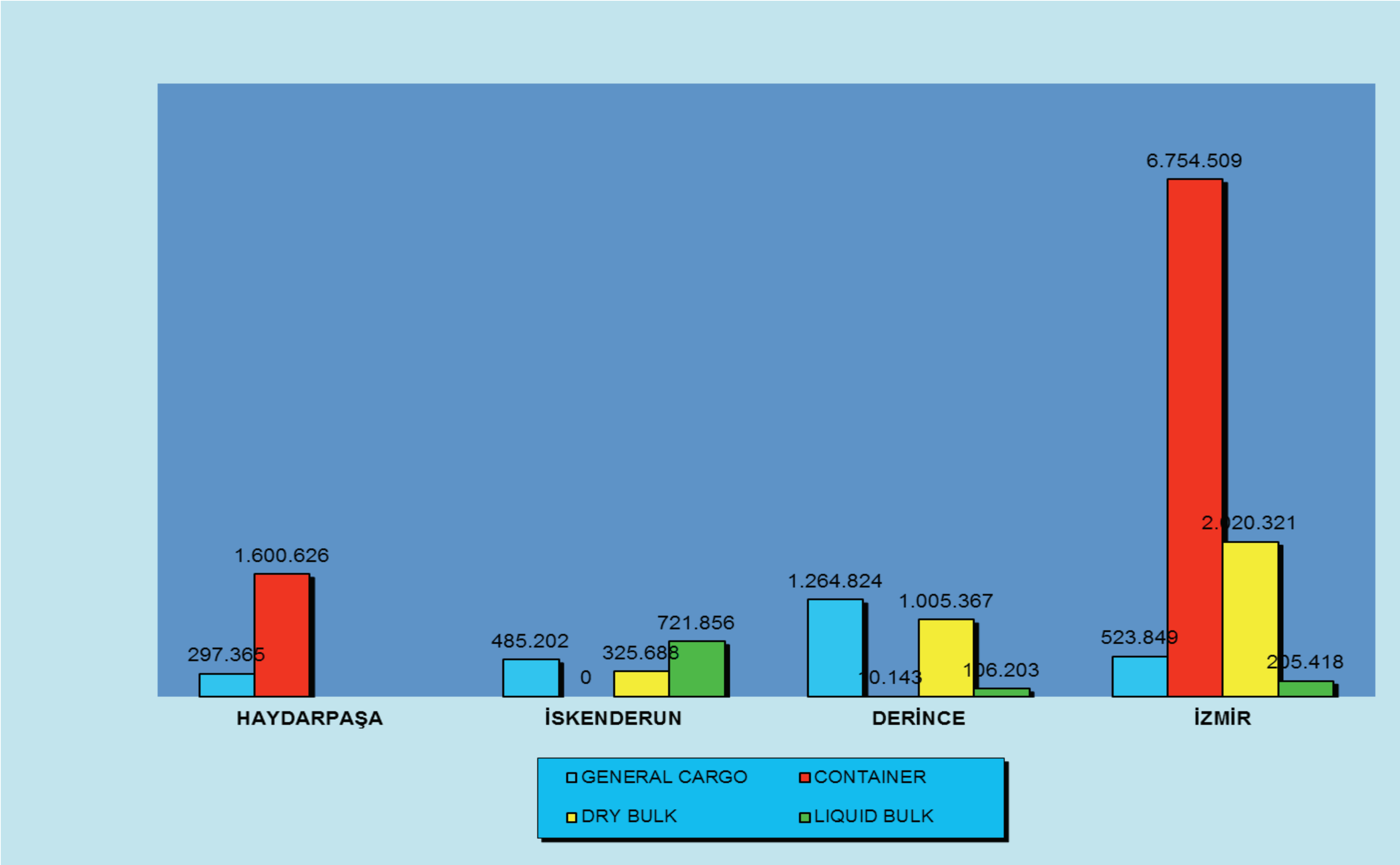
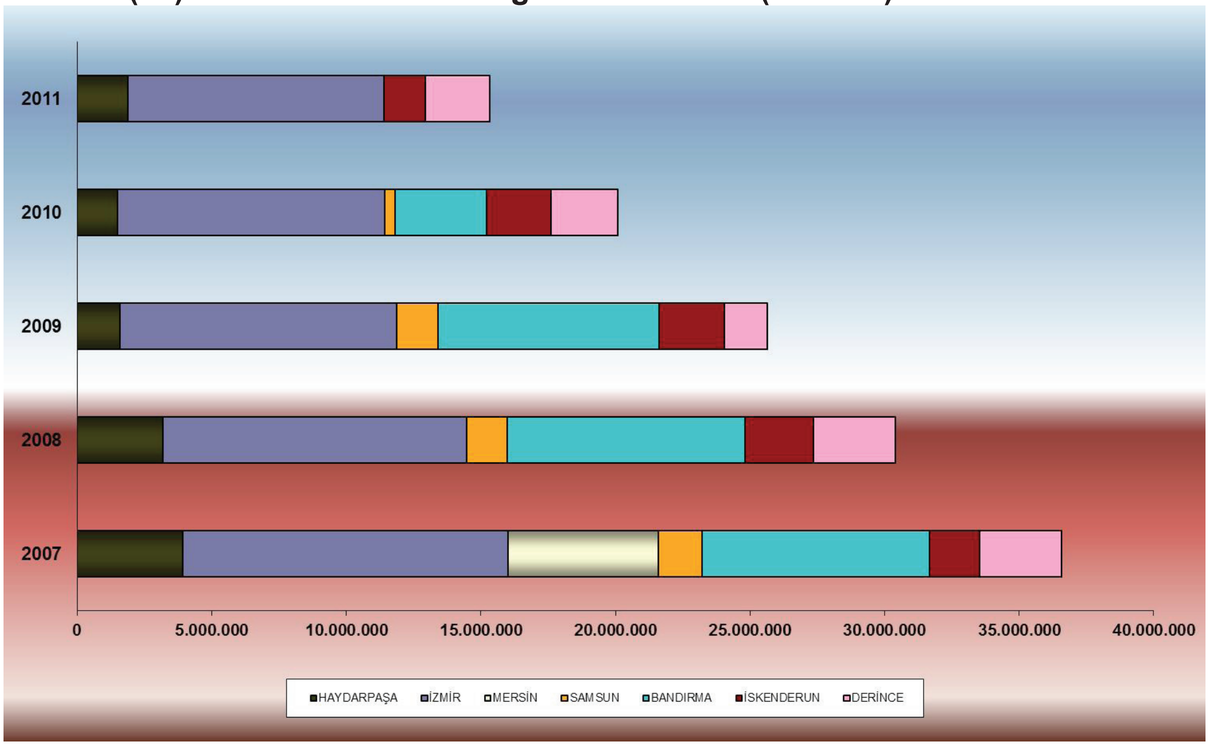


Table (57): TCDD Ports Loading And Unloading Figures

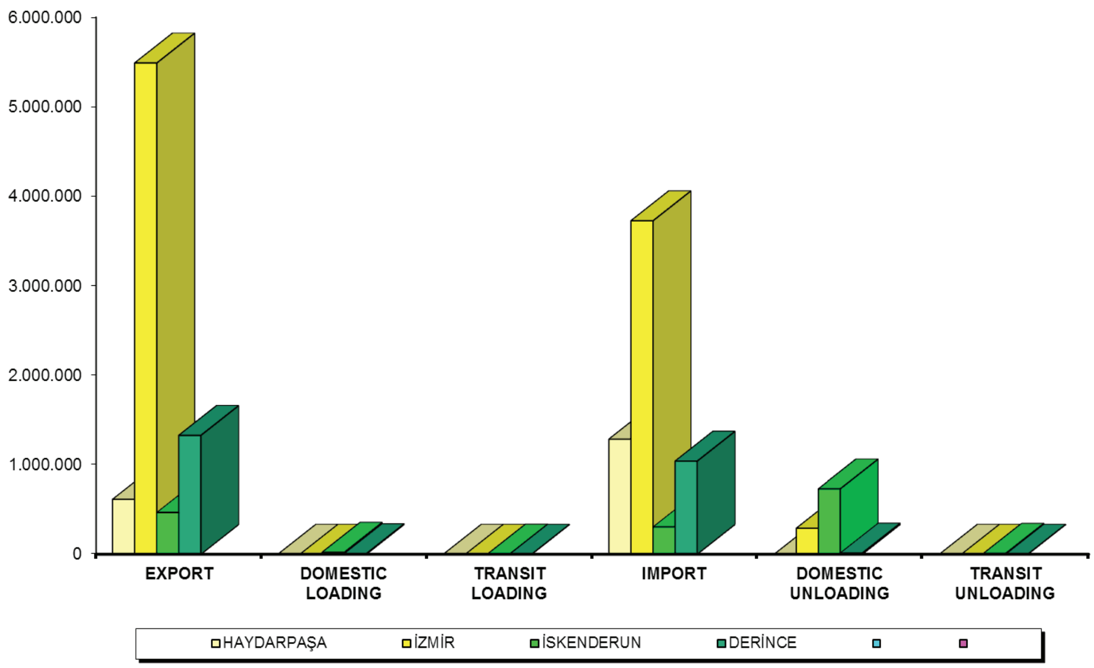
YEARS	LOADING			UNLODAING			TOTAL
	EXPORT	DOMESTIC	TRANSIT	IMPORT	DOMESTIC	TRANSIT	
HAYDARPAŞA							
2007	1.065.764	310.685	0	2.259.776	291.960	0	3.928.185
2008	1.133.144	0	0	2.039.605	600	0	3.173.349
2009	537.233	949	0	1.056.288	3450	0	1.597.920
2010	403.616	20515	0	1.067.730	0	0	1.491.861
2011	**612.846**	**0**	**0**	**1.285.145**	**0**	**0**	**1.897.991**
İZMİR							
2007	7.724.318	15.355	0	4.180.422	148.081	0	12.068.176
2008	7.135.766	0	0	4.073.723	94.367	0	11.303.856
2009	7.048.167	0	0	3.122.568	107.375	0	10.278.110
2010	6.340.777	0	0	3.308.371	277.410	0	10.278.110
2011	**5.488.035**	**0**	**0**	**3.725.904**	**290.158**	**0**	**9.504.097**
MERSİN							
2007	2.119.530	6.100	150.145	2.804.897	222.208	301.652	5.604.532
2008	0	0	0	0	0	0	0
2009	0	0	0	0	0	0	0
2010	0	0	0	0	0	0	0
2011	**0**	**0**	**0**	**0**	**0**	**0**	**0**
SAMSUN							
2007	531.109	6.990	0	1.042.818	31.171	4.217	1.616.305
2008	497.155	0	0	996.868	13.670	5.418	1.513.111
2009	566.951	0	0	957.831	2.453	1.771	1.529.006
2010	150.598	988	0	248.093	4.667	299	404.645
2011	**0**	**0**	**0**	**0**	**0**	**0**	**0**
BANDIRMA							
2007	761.558	3.035.399	2.000	1.908.423	2.755.463	2.000	8.464.843
2008	831.194	2.980.449	1.430	2.125.593	2.882.024	1.430	8.822.120
2009	676.922	3.075.320	0	1.616.595	2.857.972	0	8.226.809
2010	298.149	1.125.521	0	923.863	1.033.801	0	3.381.334
2011	**0**	**0**	**0**	**0**	**0**	**0**	**0**
İSKENDERUN							
2007	365.121	1.457	406	622.762	834.604	22.388	1.846.738
2008	695.983	11.442	33.318	1.002.140	739.022	53.351	2.535.256
2009	782.031	42.230	558	710.119	861.367	17.038	2.413.343
2010	836.452	85.301	269	668.723	790.185	19.576	2.400.506
2011	**465.918**	**21.025**	**1.676**	**304.453**	**729.548**	**10.126**	**1.532.746**
DERİNCE							
2007	843.687	1.234	0	2.185.773	342	0	3.031.036
2008	1.061.350	162	4.922	1.989.065	599	2.250	2.224.344
2009	787.645	0	704	759.747	38.368	253	1.586.717
2010	1.580.194	0	0	884.841	20.094	131	2.485.260
2011	**1.327.729**	**6.164**	**96**	**1.040.057**	**12.491**	**0**	**2.386.537**
TOTAL							
2007	13.411.087	3.377.220	152.551	15.004.871	4.283.829	330.257	36.559.815
2008	11.354.592	2.992.053	39.670	12.226.994	3.730.282	62.449	30.406.040
2009	10.398.949	3.118.499	1.262	8.223.148	3.870.985	19.062	25.631.905
2010	9.609.786	1.232.325	269	7.101.621	2.126.157	20.006	20.441.716
2011	**7.894.528**	**27.189**	**1.772**	**6.355.559**	**1.032.197**	**10.126**	**15.321.371**

** Mersin Port 2007 Tonnage is till end of April*
** Samsun Port 2010 Tonnage is till end of March*
** Bandırma Port was handed over to Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş. on 18.05.2010.*

GRAPH (56): TCDD Ports Handling Acc. To Years (Tonnes)



GRAPH (57): 2011 TCDD Ports Cargo Handling Acc. To Transportation Modes



Source: TCDD

Haydarpaşa Port

Haydarpaşa Port is in the province of İstanbul which is one of the most important metropolises. İstanbul is not only the most industrialized region but it has also the foremost cultural sightseeing and fascinating historical artifacts. İstanbul is known as an open air museum in the world.

Haydarpaşa is in the meeting point of and in the area covering Black Sea Countries and the waterway of Rhein-Main-Danube Canal and it is gaining substantial importance in this aspect.

Haydarpaşa port has all modes of transport such as sea, rail and land road. It renders services 24 hours, the length of berths is 2,675 meters, ships receipt capacity is 2,213 per year, and also container handling capacity is 360.000 TEU.

Port Capacities

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

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

Derince Port

As an import and export gate for Izmit industrial hinterland, Derince Port is located in the East Marmara Sea. With a regular train ferry services between Derince Port and Costanta Port of Romania, the port gives an opportunity for combined transport of rail and sea

Port Capacities

	Ships/Year	*Berth Lenght (m)*	*Max. Depth (-m)*
Container	300	200	14
Dry Cargo	324	752	6, 10
Ro-Ro	238	140	14
Total	862	1,092	

Storage Area	*m²*	**Capacity**
Open (Tons/Year)	122,990	2,952,000
Closed (Tons/Year)	2,000	32,000

İzmir Port

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

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

Port Capacities

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

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

Port Privatizations of Turkish Railways

Privatization Completed Ports

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

Privatization Tender Cancelled Port

PORT NAME	DATE OF TENDER	CANCELLING DATE OF TENDER
DERİNCE	21.06.2007	14.06.2010
İZMİR	03.05.2007	28.04.2010

Privatized TCDD Ports

Mersin International Port (MIP)

Strategic Location

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

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

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

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

Access by railroad

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

Access by highway

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

Free Port Zone

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

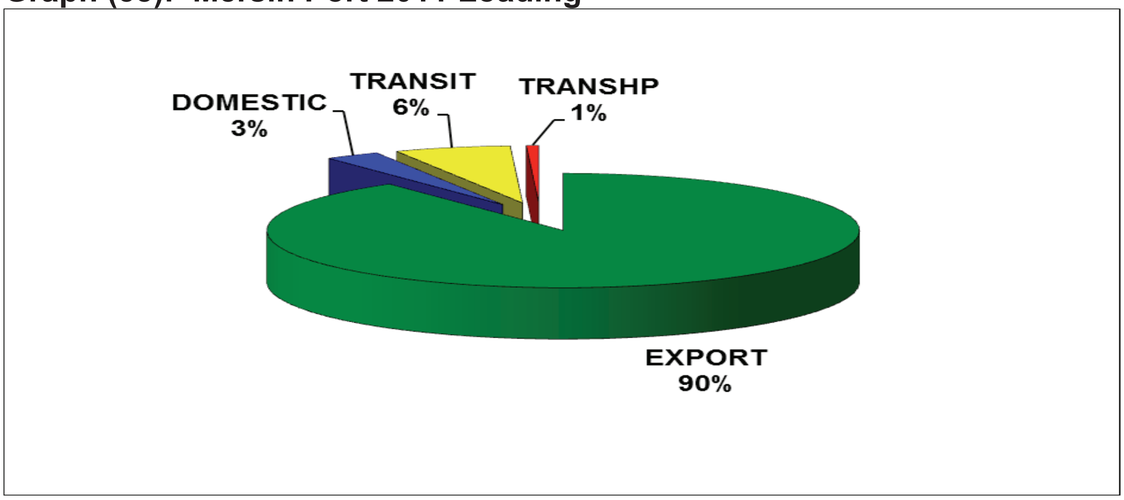
Table (58): Handling Figures of Mersin International Port (2011)

MERSIN INTERNATIONAL PORT									
TYPE OF CARGO	LOADING (Tonnes)				UNLOADING (Tonnes)				TOTAL
	EXPORT	DOMESTIC	TRANSIT	TRANSHP	IMPORT	DOMESTIC	TRANSIT	TRANSHP	
CEMENT	994.466	53.114	37.781		2.777		2.443		1.090.581
CEREALS	91.466	34.712	13.911	96	1.189.230	11.974	9.823	98	1.351.310
CHEMICALS	578.436	14.035	4.251	10.359	1.594.074	34.498	25.218	10.188	2.271.059
CITRUS	32.726		1.808		52.285		354		87.173
CNTR			296.756				275.722		572.478
CONST. MACHINERY	10.814		104	34	13.419		7.025	94	31.490
COTTON	50.311		3.064	1.079	402.279	1.101	463	2.072	460.369
EMPTY MAFI			9				8		17
FERTILIZERS	17.176	35.411	226	59	177.246	25.128	2.570	71	257.887
FOOD STUFF	1.040.850		24.353	888	757.124	8.146	64.991	2.307	1.898.659
FROZEN MEAT	4.274		433		20.264		109.604		134.575
FRUITS	137.887		4.928	327	82.538	40	400.262	212	626.194
GENERAL CARGO	1.734.143	2.310	155.754	43.988	1.683.844	108.830	286.434	36.277	4.051.580
GLASS	168.046	977	208	772	22.654		251	135	193.043
LEGUMES	171.639		2.884	244	514.600	184	9.387	137	699.075
LIVESTOCK					55.856		1.730		57.586
MACHINERY	28.773		2.026	559	46.477	454	3.219	800	82.308
MINERALS	2.335.012	17.585	23.525	3.140	551.844	5.485	1.219	3.235	2.941.045
PETR. PRODUCTS	170.148	116.141	432	338	3.398.806	561.758	20.716	344	4.268.683
RICE	92.689		2.312		238.360		12.530		345.891
SODIUM CARB.	525.722	6.250	194	88	483		47		532.784
SUGAR	5.334		3.348		836		1.097		10.615
TEXTILE	234.928	117	8.300	767	577.369	813	26.657	1.782	850.733
TIMBER	2.949		4.958	20	25.829	1.818	3.827		39.401
VEGETABLE OIL	32.359		646	74	620.680	12.566	3.539	276	670.140
VEHICLES	9.249		3.413	270	27.319	34	56.751	567	97.603
TOTAL	8.469.397	280.652	595.624	63.102	12.056.193	772.829	1.325.887	58.595	23.622.279

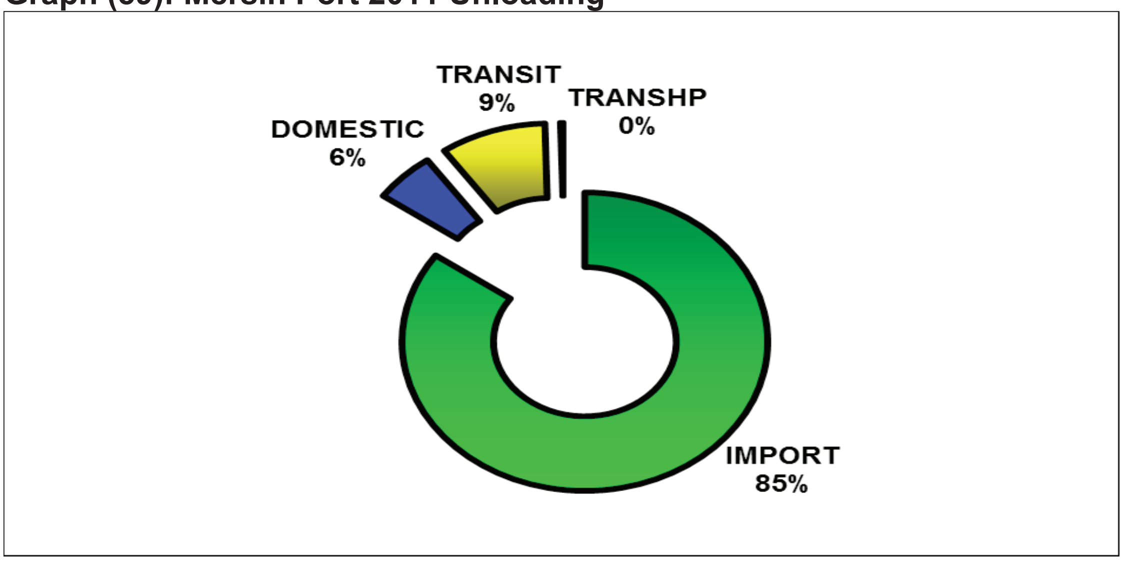
Table (59): Container Handling Figures of MIP (2011)

CONTAINER TYPES		LOADED	DISCH.	TOTAL
		Num.	Num.	Num.
20' CNTR	FULL	175.720	99.379	275.099
	EMPTY	11.334	87.717	99.051
40' CNTR	FULL	115.039	168.298	283.337
	EMPTY	68.136	22.382	90.518
BOX	FULL	290.759	267.677	558.436
	EMPTY	79.470	110.099	189.569
TEU	FULL	405.798	435.975	841.773
	EMPTY	147.606	132.481	280.087
TOTAL	BOX	370.229	377.776	748.005
	TEU	553.404	568.456	1.121.860

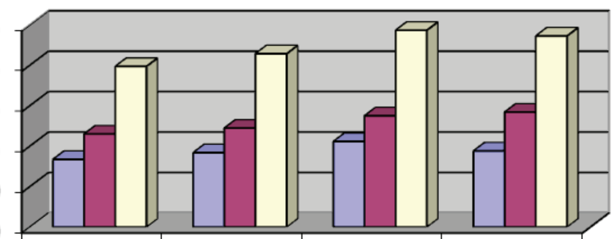
Graph (58): Mersin Port 2011 Loading



Graph (59): Mersin Port 2011 Unloading



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



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

Source: MIP

Samsunport (Samsun)

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

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

Storage and port services are provided within 350.000 sqm port area of 445.000 sqm . In Samsunport, there are steel cereal silos, warehouses and general cargo storage areas.

Main Port
Dock numbers 1-2-3-4-5 have a total length of 776 meters and a draft of 7,5 to 10 meters.
Dock number 9 has a length of 400 meters and a draft of 6 meters.
Industry Dock
Dock numbers 6-7 have a total length of 400 meters and a draft of 11 meters.
Dock number 8 is Rail ferry Ramp, suitable for 1520 mm rail cars.

1183 vessels called Samsun Port in 2011. Handling Figures of Samsun Port according to cargo groups are as below;

Handling Figures of Çelebi Bandırma Port

Year	Dry Bulk (Tons)	Liquid Bulk (Tons)	General Cargo (Tons)	Container (Tons)	Total
2011	1.064.298	14.848	1.354.972	82.212	2.516.330
2010	844.993	32.008	1.038.791	4.015	1.920.807

Source: Samsunport

Çelebi Bandırma Port

The port has connections to Istanbul, Turkey's business and industrial center, to the Southern Marmara and Aegean Region and has a strategic location at the south coast of Marmara. It offers bulk load, ro-ro and mixed load handling services. Also in addition to having the longest pier in the region it is one of the biggest bulk load ports of Turkey. When the ro-ro services commenced in 2004, Port of Bandırma became an important stop for the shipment of truck loads from the Marmara region to inland regions.

Çelebi, thanks to the railway and highway connections and wide warehouses of Port of Bandırma, is considered the port that can provide the greatest benefit to the Southern Marmara, Central Anatolia and the Aegean Sea Regions. Çelebi will start a reconstruction process for the port so that it can serve this wide hinterland with a capacity of 10 mn tons of dry bulk and mixed load, and 300,000 TEU containers and 200,000 vehicles in the next 10 years.

The Port will also serve as an alternative to the increasing need of automotive industry in Bursa, which has an ever increasing export volume.
The improvements are estimated to bring the share of the port in international cargo handling from 2.7% in 2009 to 5,2% in 2020. Port of Bandırma will not only turn into one of the logistics centers in the region, but also contribute to the economical and social development of the region with the creation of employment opportunities.
Çelebi, aims to invest 50 million USD in the next 5 years in Port of Bandırma.

Handling Figures of Çelebi Bandırma Port

Year	General Cargo (Tons)	Bulk (Tons)	Liquid (Tons)	Container (TEU)	Ro-Ro (Pcs)	Passenger (Pcs)
2011	345.082	3.214.328	190.912	2.072	198.366	967.115
2010 *	145.631	2.060.021	67.170	0	129.044	No Data

** 2010 Values Are Since 18.05.2010.*

Source: Çelebi Bandırma Port

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

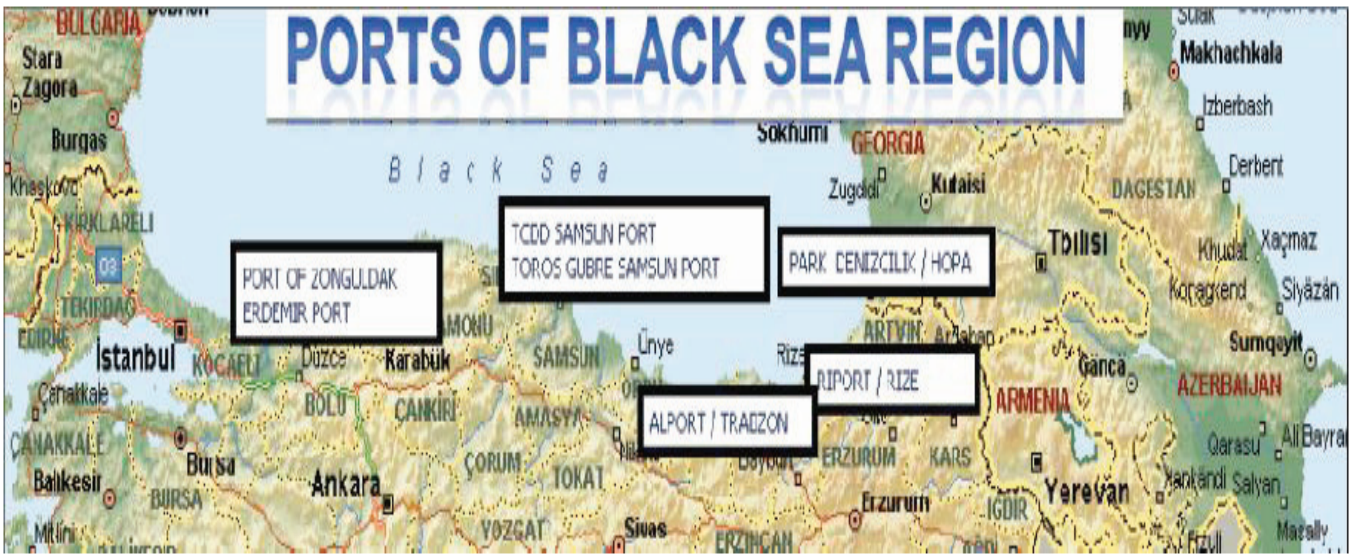
PRIVATE PORTS ACCORDING TO REGION
ANTALYA DISTRICT
1. ALİDAŞ ALANYA LİMANI 2. ANTALYA LİMANI SERBEST BÖLGE RIHTIMI 3. ÇEKİSAN ŞAMANDIRASI 4. MOİL ŞAMANDIRA PLATFORMU 5. ORTADOĞU ANTALYA LİMAN İŞLETMELERİ A.Ş. (PORT AKDENİZ) 6. POAŞ ANTALYA ŞAMANDIRA TERMİNALİ
ÇANAKKALE DISTRICT
1. AKÇANSA ÇANAKKALE LİMANI 2. BAGFAŞ İSKELESİ 3. PORT OF BANDIRMA 4. BORUSAN LİMANI 5. BP GEMLİK İSKELESİ 6. GEMLİK GÜBRE LİMANI 7. GEMPORT 8. RODA LİMAN DEPOLAMA VE LOJİSTİK İŞLETMELERİ A.Ş. 9. İÇDAŞ İSKELESİ 10. DOLAMİT MADENCİLİK RIHTIMI 11. ÖZGÜMÜŞ MADENCİLİK RIHTIMI
İSTANBUL DISTRICT
1. ASYAPORT 2. AUTOPORT LİMAN İŞLETMELERİ A.Ş. 3. AKÇANSA AMBARLI LİMANI 4. AMBARLI DEPOLAMA TESİSLERİ 5. ANADOLU ÇİMENTO TESİSLERİ 6. SET ÇİMENTO SANAYİ VE TİCARET A.Ş. 7. AYGAZ LPG DEPOLAMA VE DOLUM TESİSLERİ 8. ÇEKİSAN ÇEKMECE DEPOLAMA 9. KUMPORT LİMANI 10. MARDAŞ 11. MARPORT

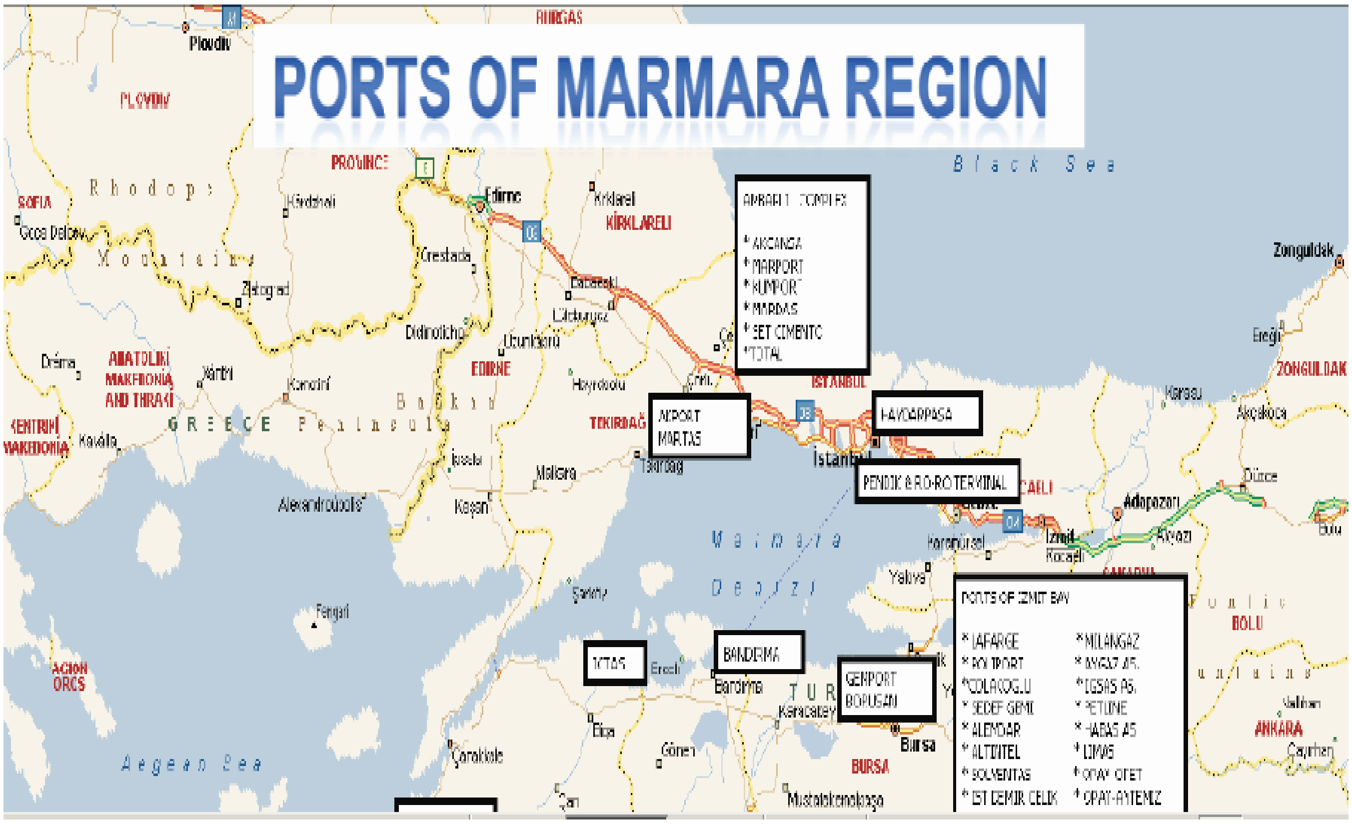
12. PETROL OFİSİ HARAMİDERE TESİSLERİ
13. TOTAL HARAMİDERE İSKELESİ
14. ANADOLU YAKASI KUMCULARI İSKELELERİ
15. MOBIL OIL SERVİBURNU İSKELESİ
16. PETROL OFİSİ ÇUBUKLU TESİSLERİ
17. ZEYPORT
18. AKÇANSA YALOVA ÇİMENTO TERMİNALİ İSKELESİ
19. AKSA AKRİLİK KİMYA SANAYİ A.Ş.
20. AKTAŞ TERMİNALİ
21. ALEMDAR DİLİSKELESİ
22. ALTINTEL İSKELESİ
23. AYGAZ YARIMCA DOLUM TESİSİ
24. ÇOLAKOĞLU METALURJİ TESİSLERİ
25. DİLER LİMAN TESİSLERİ
26. EVYAP DENİZ İŞLETMECİLİĞİ LOJİSTİK VE İNŞAAT A.Ş.
27. FORD OTOSAN YENİKÖY İSKELESİ
28. GÜBRETAŞ TESİSLERİ
29. HABAŞ TERMİNALİ
30. İGSAŞ İSTANBUL GÜBRE SANAYİ A.Ş.
31. EFESAN PORT
32. KIZILKAYA LİMANI
33. KORUMA KLOR ALKALİ SAN. VE TİC. A.Ş.
34. KROMAN ÇELİK LİMAN TESİSLERİ
35. LAFARGE ASLAN ÇİMENTO İSKELESİ
36. LİMAŞ İZMİT TERMİNALİ
37. MARMARA TRANSPORT İSKELESİ
38. MİLANGAZ ŞAMANDIRA TESİSLERİ
39. NUH ÇİMENTO SAN. A.Ş. (NUHPORT)
40. OPAY PLATFORM İSKELESİ
41. PETLINE PLATFORMU
42. PETROL OFİSİ DERİNCE İSKELESİ
43. POLİPORT
44. SEDEF KONTEYNER TERMİNALİ VE LİMAN İŞLETMELERİ
45. SHELL DERİNCE TESİSLERİ
46. SOLVENTAŞ
47. TOTAL GEBZE TERMİNALİ
48. TURKUAZ İSKELESİ
49. TÜPRAŞ İZMİT RAFİNERİ TESİSLERİ
50. TÜPRAŞ KÖRFEZ SIVI YÜK İSKELESİ
51. YALOVA ELYAF İSKELESİ
52. YARIMCA ROTA LİMANI
53. DP WORLD YARIMCA LİMANI
54. ERDEM EREĞLİ ÇİMENTO ÖZEL LİMANI
55. ERDEMİR LİMANI
56. EREN HOLDİNG LİMANI
57. BÜTANGAZ TERMİNALİ
58. OPET MARMARA TERMİNALİ İSKELE VE PLATFORMU
59. AKPORT
60. MARTAŞ MARMARA EREĞLİSİ LİMAN TESİSLERİ
61. ÇAYIROVA CAM SANAYİ İSKELESİ
62. GİSAŞ TUZLA İSKELESİ
63. U.N. RO-RO PENDİK LİMANI
64. YILPORT

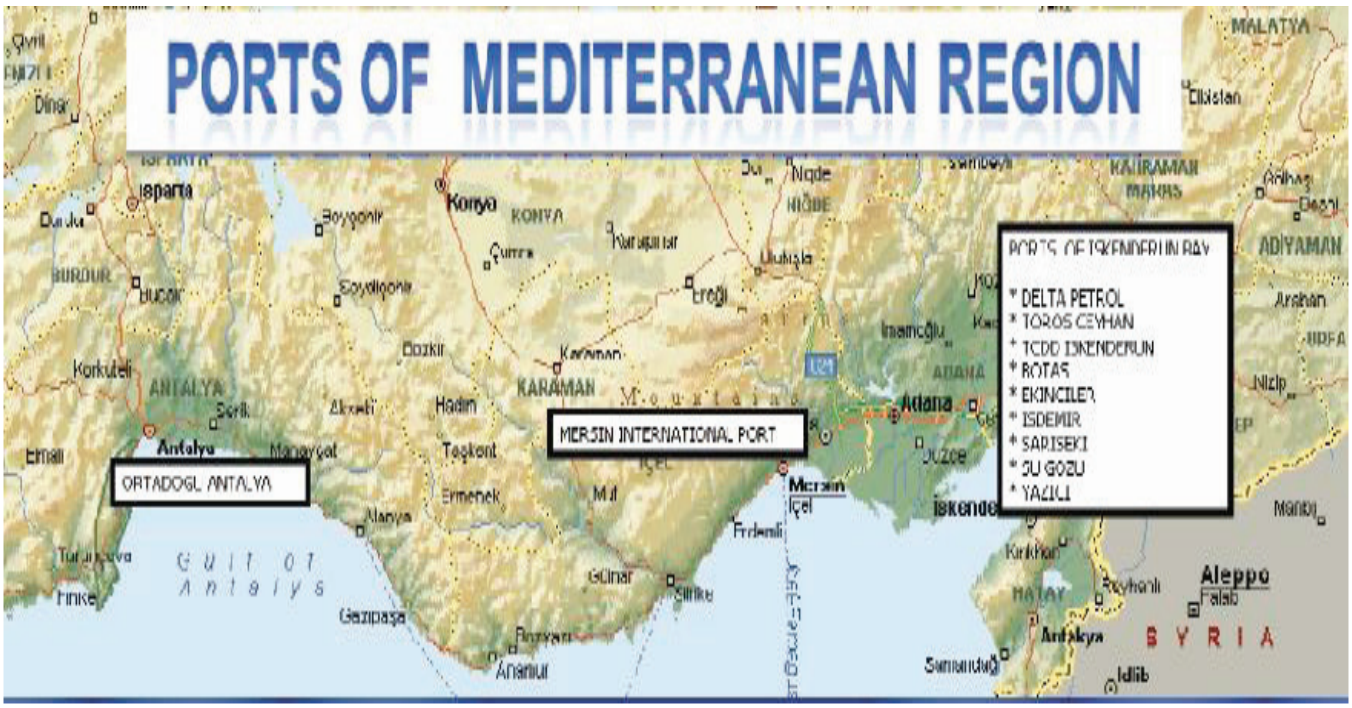
İZMİR DISTRICT
1. AKDENİZ KİMYA NEMPORT LİMANI 2. EGE ÇELİK LİMANI 3. EGE GÜBRE LİMANI 4. EGE GAZ LNG TERMİNALİ 5. HABAŞ İSKELESİ 6. BATIÇİM A.Ş. BATI LİMAN TESİSLERİ 7. İDÇ LİMANI 8. PETROL OFİSİ ALİAĞA TESİSLERİ 9. TOTAL OIL İSKELESİ 10. TÜPRAŞ LİMANI 11. PETKİM LİMANI 12. BODRUM CRUISE PORT 13. GÜLLÜK GEMİ YANAŞMA İSKELESİ 14. ÇEŞME LİMANI 15. DİKİLİ İSKELESİ 16. MOPAK İSKELESİ 17. KUŞADASI YOLCU LİMANI 18. MARMARİS LİMANI
MERSİN DISTRICT
1. TOROS CEYHAN TERMİNALİ 2. ADVANSA SASA POLYESTER TESİSLERİ 3. ÇEKİSAN ŞAMANDIRASI 4. GÜBRETAŞ SARISEKİ İSKELESİ 5. İSDEMİR LİMANI 6. DELTA PETROL LİMANI 7. ORHAN EKİNCİ İSKELESİ 8. YAZICI İSKELESİ 9. ATAŞ TERMİNALİ 10. MERSİN LİMANI 11. MMK ATAKAŞ DÖRTYOL LİMAN İŞLETMESİ 12. MESBAŞ RIHTIMI
SAMSUN DISTRICT
1. SAMSUNPORT 2. TOROS TARIM SANAYİİ SAMSUN LİMAN İŞLETMESİ 3. SÜRSAN ŞAMANDIRASI 4. ORDU LİMANI 5. AYGAZ ŞAMANDIRALARI 6. PETROL OFİSİ ŞAMANDIRALARI 7. TOTAL OIL ŞAMANDIRASI 8. YILDIZ ENTEGRE AĞAÇ SAN. ŞAMANDIRASI 9. SİNOP LİMANI
TRABZON DISTRICT
1. GİRESUN LİMANI 2. PARK DENİZCİLİK HOPA LİMAN İŞLETMELERİ A.Ş. 3. RİPORT 4. ÜNYE ÇİMENTO TESİSİ LİMANI 5. POAŞ ŞAMANDIRA TESİSLERİ 6. TRABZON LİMANI

Graph (61): Geographical Distribution of Main Ports in Turkey

Source: TURKLIM




PORTS OF MARMARA REGION
AMBARLI COMPLEX
* AKCANSA
* MARPORT
* KUMPORT
* MARDAS
* SET CIMENTO
* TOTAL
AKPORT
MARTAS
HAYDARPASA
PENDIK & RO-RO TERMINAL
ICTAS
BANDIRMA
GEMPORT
BORUSAN
PORTS OF IZMIT BAY
* LAFARGE
* COLAKOGLU
* SEDEF GEMI
* ALEMDAR
* ALTINTEL
* SOLVENTAS
* IST DEMIR CELIK
* MILANGAZ
* IGSAS AS.
* HABAS AS
* LIMAS
Black Sea
Marmara Denizi
Aegean Sea
Istanbul
Edirne
Bursa
Izmit
Kocaeli
Adapazari
Zonguldak
Plovdiv


PORTS OF MEDITERRANEAN REGION
PORTS OF ISKENDERUN BAY
* DELTA PETROL
* TOROS CEYHAN
* TCDD ISKENDERUN
* ROTAS
* EKINCILER
* ISDEMIR
* SARISEKI
* SU GOZU
* YAZICI
MERSIN INTERNATIONAL PORT
ORTADOGU ANTALYA
Gulf of Antalya
Antalya
Konya
Karaman
Mersin
Adana
Aleppo
SYRIA


PORTS OF AEGAN REGION
ALIAGA PORT COMPLEX
* BATICIM
* EGE GUBRE
* PETKIM
* HABAS
* PETROL OFISI
* TOTAL
* TUBRAS
* EGE GAZ
* IDC
CESME
IZMIR
GULLUK


PORTS OF IZMIT BAY


•LAFARGE ASLAN ÇİMENTO A.Ş.
•www.lafarge.com.tr
• ROTA Limanı
• www.rotadenizcilik.com.tr
•EVYAP Deniz İşletmeciliği
•www.evyap.com.tr
•ÇOLAKOĞLU METALURJİ A.Ş.
•www.colakoglu.com.tr
• SOLVENTAŞ TEKNİK
• www.solventas.com.tr
•TCDD DERİNCE LİMAN İŞLETMESİ
•www.tcdd.gov.tr
•ALEMDAR DİLİSKELESİ LİMAN
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TURKISH STRAITS
EMES
ARKAS

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.

Beside its geopolitic and strategic importance, the Turkish Straits is highly congested with international maritime traffic due to being only waterway between the Black Sea and the Mediterranean Sea without any alternative.

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

TABLE (60) : Ships Passing Through the Turkish Straits

YEARS	ISTANBUL	ÇANAKKALE
1998	49.304	38.777
1999	47.906	40.582
2000	48.079	41.561
2001	42.637	39.249
2002	47.283	42.669
2003	46.939	42.648
2004	52.452	48.421
2005	54.794	49.077
2006	54.880	48.915
2007	56.506	49.913
2008	54.396	48.978
2009	51.422	49.453
2010	50.871	46.686
2011	49.798	45.397

In the year 2011, 49.798 ships in total have passed through Istanbul Strait with a monthly average of 4.149 ships, 45.397 ships in total have passed through Çanakkale Strait with a monthly average of 3.783 ships. Daily averages are 138 ships for İstanbul Strait and 126 ships for Çanakkale Strait.

In the year 2011, 138.496.245 tons of dangerous cargoes transited through İstanbul Strait. 156.327.711 tons of dangerous cargoes transited through Çanakkale Strait. In addition to these figures, approximately more than two million people pass across the İstanbul Strait daily by small passenger vessels. This value is four times higher than Suez Channel and three times than Panama Channel. This density of traffic between Asia and Europe increases by the population of İstanbul which has reached nearly 15 million.

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

TABLE (61) Statistics of Ships Passing through İstanbul Strait

YEARS	TOTAL SHIPS	WITH PILOT	SP1	TRANSIT	SMALLER THAN 200M	BIGGER THAN 200M	SMALLER THAN500GT	BIGGER THAN 500GT
1999	47906	18424	30619	26323	45738	2168	3552	44354
2000	48079	19209	38564	26858	45776	2203	3345	44734
2001	42637	17767	38940	26113	40184	2453	2155	40482
2002	47283	19905	44726	29398	44170	3113	1933	45350
2003	46939	21175	45340	28951	44016	2923	1782	45157
2004	54564	22318	54564	34256	51512	3052	2107	52457
2005	54794	24494	54686	34111	51291	3503	1610	53184
2006	54880	26589	53324	31880	51227	3653	2176	52704
2007	56606	26685	55132	31826	52953	3653	2138	54468
2008	54396	27001	53232	31762	50485	3911	1800	52536
2009	51422	25073	50712	32297	47551	3871	1128	50294
2010	50871	26035	50020	28668	47248	3623	1377	49494
2011	49798	26011	49179	27938	45998	3800	1046	48752

TABLE (62) Statistics of Ships Passing through Çanakkale Strait

YEARS	TOTAL SHIPS	WITH PILOT	SP1	TRANSIT	SMALLER THAN 200 M	BIGGER THAN 200M	SMALLER THAN 500 GT	BIGGER THAN 500 GT
1999	40582	10002	24553	26900	38014	2568	1492	39090
2000	41561	11130	33861	27033	38864	2697	1398	40163
2001	39249	10704	37525	26452	36289	2960	936	38313
2002	42669	12164	42077	29900	39004	3665	689	41980
2003	42648	13020	42648	29114	38925	3723	677	41971
2004	48421	14404	48421	36310	44504	3917	1327	47094
2005	49077	15661	48979	34784	44585	4492	1211	47866
2006	48915	16871	48264	32061	44070	4845	1404	47511
2007	49913	16885	48802	31981	44968	4945	1873	48040
2008	48978	18334	48565	31981	43755	5223	844	48134
2009	49453	18588	49210	32559	44277	5176	615	48838
2010	46686	18678	46469	28768	41588	5098	598	46088
2011	45379	18920	45196	27983	39885	5494	572	44807

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

TABLE(63): The Ships Carried Dangerous Cargoes – İstanbul Strait

Years	Total passage	Number of Tankers	%	Dangerous Cargoes (Tons)
1997	50942	4303	12	63.017.194
1998	49304	5142	13	68.573.523
1999	47906	5504	12	81.515.453
2000	48079	6093	13	91.045.040
2001	42637	6516	15	101.000.000
2002	47283	7427	16	122.953.338
2003	**46939**	**8097**	**17**	**134.603.741**
2004	**54564**	**9399**	**17**	**143.448.164**
2005	**54794**	**10027**	**18**	**143.567.196**
2006	**54880**	**10153**	**19**	**143.452.401**
2007	**56606**	**10054**	**18**	**143.939.432**
2008	**54239**	**9303**	**17**	**140.357.231**
2009	**51422**	**9299**	**18**	**144.656.744**
2010	**50871**	**9273**	**18**	**146.748.375**
2011	**49798**	**9113**	**18**	**138.496.245**

TABLE (64):The Ships Carried Dangerous Cargoes – Çanakkale Strait

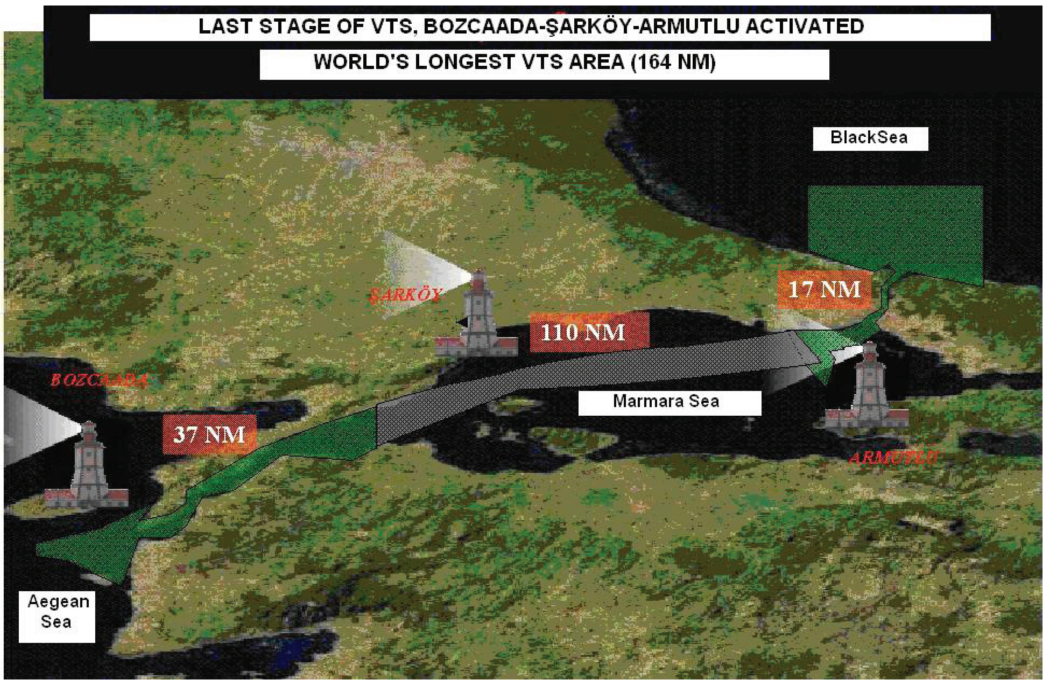
Years	Total passage	Number of Tankers	%	Dangerous Cargoes (Tons)
1997	36543	6043	17	80.485.711
1998	38777	6546	17	81.974.831
1999	40582	7266	18	95.932.049
2000	41561	7529	18	102.570.322
2001	39249	7064	18	109.000.000
2002	42669	7627	18	130.866.598
2003	**42648**	**8114**	**19**	**145.154.920**
2004	**48421**	**9016**	**19**	**139.203.656**
2005	**49077**	**8813**	**18**	**148.951.376**
2006	**48915**	**9567**	**20**	**152.725.701**
2007	**49913**	**9271**	**18**	**149.320.062**
2008	**48978**	**8758**	**18**	**149.052.174**
2009	**49453**	**9567**	**19**	**152.105.494**
2010	**46686**	**9250**	**20**	**156.928.857**
2011	**45379**	**8828**	**19**	**156.327.711+**

Activities Made for Controlling the Maritime Traffic in Turkey

Turkish Straits Vessel Traffic Services - Additional Traffic Observation Stations

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

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



Vessel Trafic Management System (VTMS) Project

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

and risky, most of the dangerous cargoes are handled and passenger transportation takes place and a single Vessel Traffic Management Center (VTMC) in which a single territory image is created be established within the Administration in Ankara.
Through 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 in a view to protecting the sea environment as well as to provide one or more of the services of information, navigation assistance and traffic organization in some or all of the regional VTS areas. Regional VTS Systems consist of 24 Traffic Surveillance Posts and 3 Vessel Traffic Services Centers.

Via the Vessel Traffic Management Center (VTMC) to be established in Ankara, the following shall be ensured

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

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

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

- The works in İzmit VTS Region (VTSC and TGI) have been completed and provisionally accepted.
- Iskenderun-Mersin VTS: TGI construction works have been completed while VTSC construction works are under progress.
- Izmir VTS: TGI and VTSC construction works are under progress.

Automatic Identification System (AIS)

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

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

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

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

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

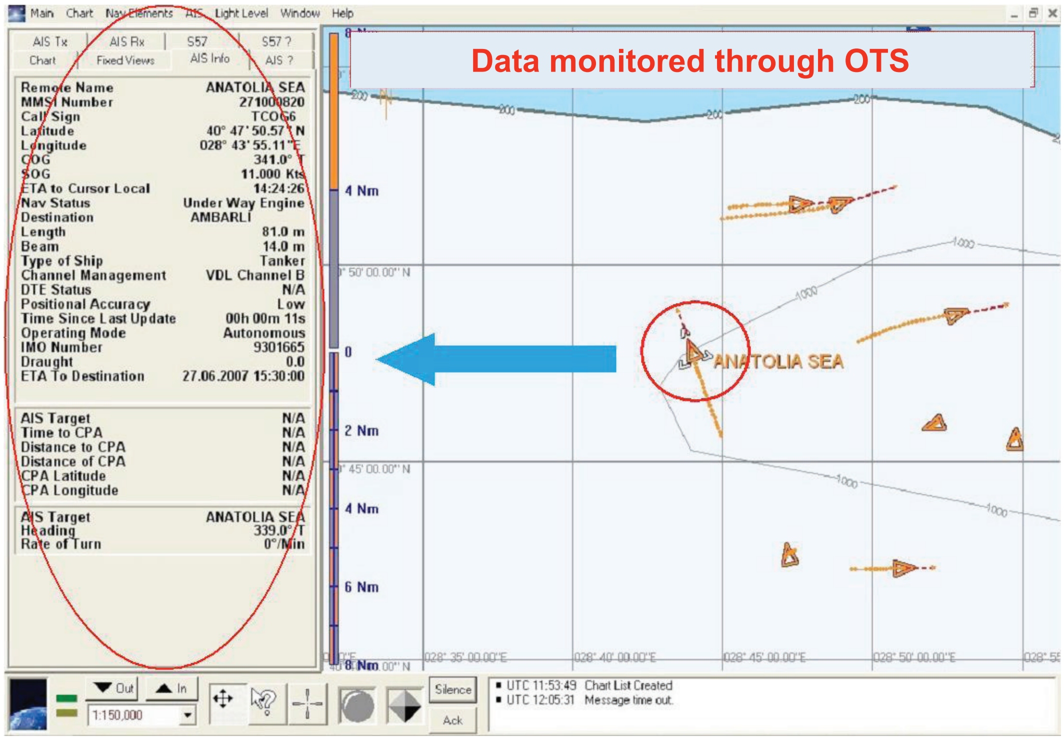
It is very important that the system infrastructure is installed on an elevated location in order to allow that the OTS Base Stations to be used between the vessels and the land have an effective coverage. Since such system operates on VHF band, it is essential that the antennas have optical sight of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

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

Data Monitored through OTS

Static Data

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



Dynamic Data

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

Navigational Data

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

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

One of the most important issues regarding OTS is that in case of any emergency of the vessel (fire, conflict, grounding, accident, etc.), she can urgently inform the situation to the coastal stations and that coastal stations can intervene at short notice because the vessel's location is known.

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

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

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

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

were achieved through OTS.

- **OTS Class-B CS**

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

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

(Long Range Identification and Tracking – LRIT) System

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

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

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

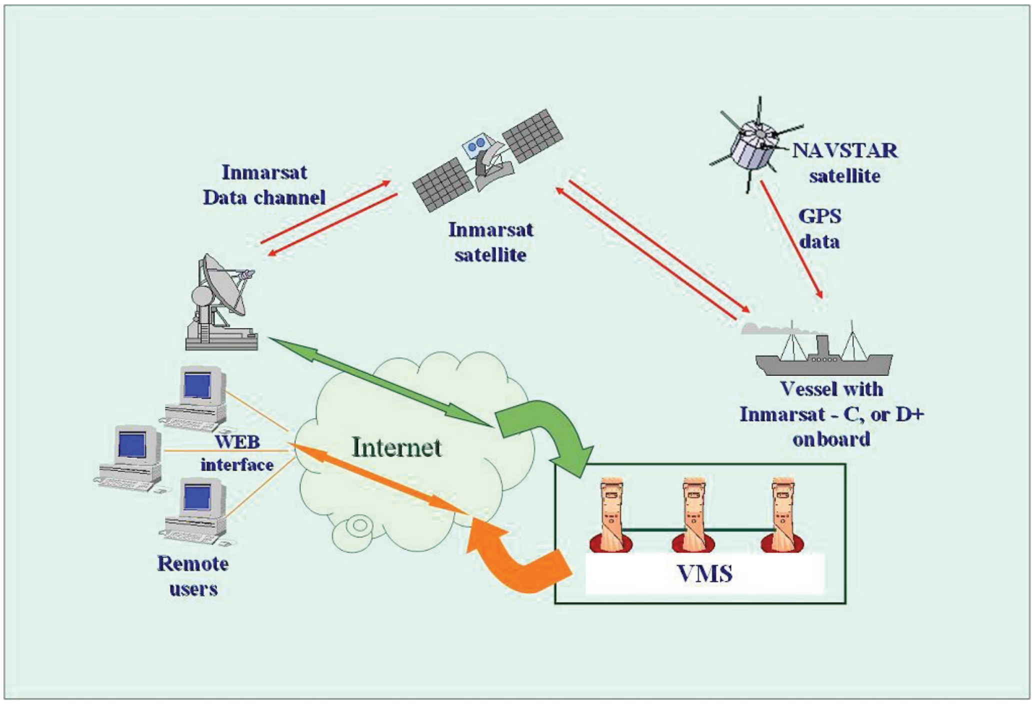
IMO member states will be able to receive long range identification and tracking information of the vessels with respect to security and other issues agreed by IMO. The responsibilities of countries as flag, port and coast states are defined.

Owing to LRIT, the countries can interrogate;

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

within the framework of rules set by IMO.

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



Operating Principle of LRIT

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

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

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

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

LRIT Current Situation

Global data sharing has been launched in LRIT System as from 30.09.2009. The National LRIT Data Center of our country was installed by TÜRKSAT A.Ş. on behalf and under the coordination of Directorate General of Maritime and Inland Waters regulation in the physical environment of Radio Operation Directorate of the General Directorate of Coastal Security. In this context, the companies to carry out LRIT compatibility test on the vessels flying Turkish flag to be traced via the system in question have been authorized by our Directorate and the tests of all of about 600 vessels flying Turkish Flag have been completed and these vessels certified.

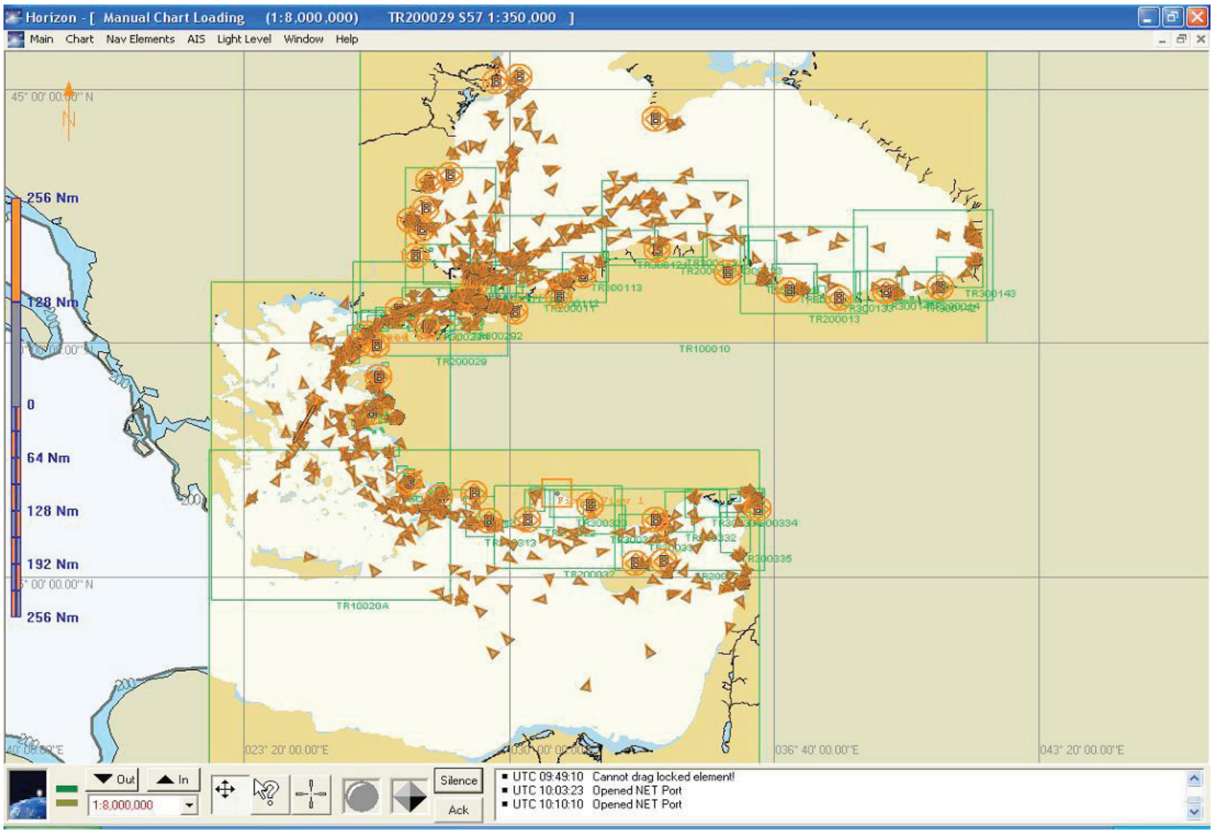
The National LRIT Data Center of our country has successfully passed the testing process coordinated by International Maritime Organization (IMO) and mandatory for data centers for integration with global LRIT system on 08/03/2010.

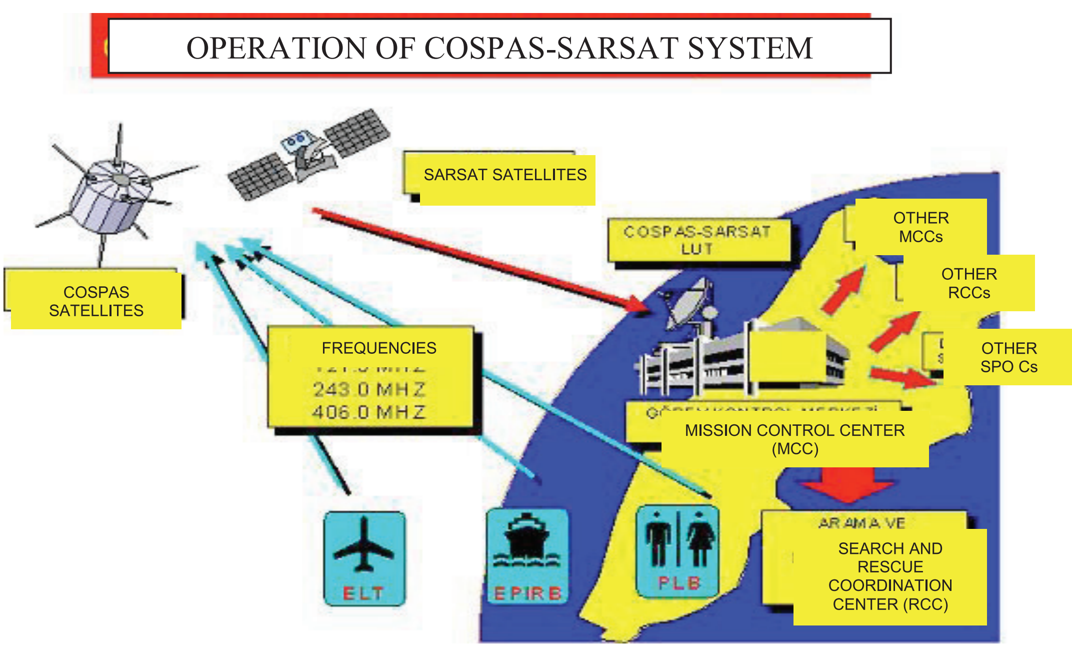
It has been possible with LRIT system to monitor the vessels flying Turkish flag everywhere in the world and vessels flying foreign flags for a distance of up to 1000 nautical miles from the coast. LRIT system operates by using INMARSAT satellites and the cost of the LRIT information requested is completely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

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

Cospas-Sarsat System

The Cospas-Sarsat (COSPAS: Cosmicheskaya Sistyema Poiska Avariynich Sudov- Space System for the Search of Vessels in Distress – SARSAT: Search And Rescue Satellite Aided Tracking) system is an international system ensuring detection via COSPAS and SARSAT satellites of the location of accident where any vessel, aircraft or persons have been engaged in an accident which notified by signals they transmitted via 121.5 MHz, 243 MHz or 460 MHz frequency, and promptly taking of action for rescue required.





The COSPAS-SARSAT (COSPAS: *Cosmicheskaya Sistyema Poiska Avariynich Sudov- Space System for the Search of Vessels in Distress* – SARSAT:

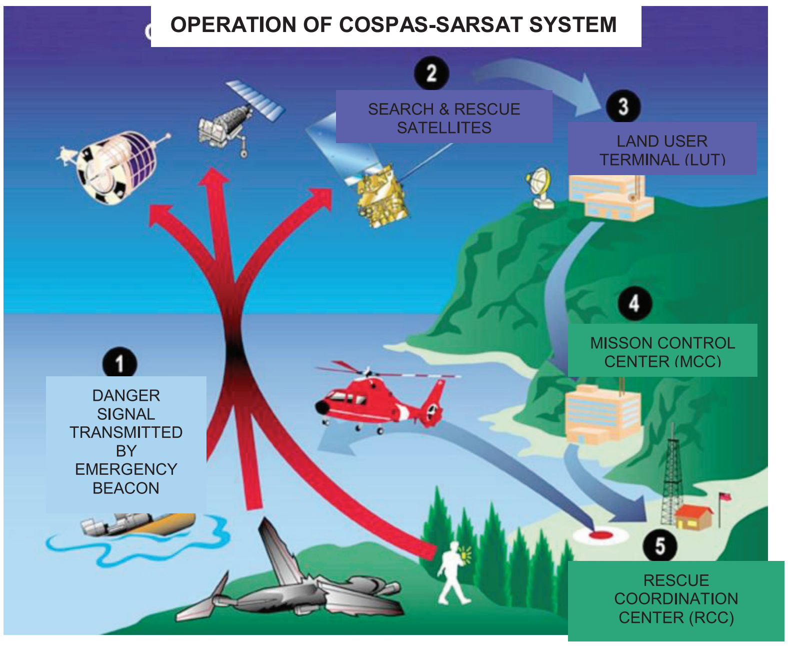
Search And Rescue Satellite Aided Tracking) system is an international system ensuring detection via the satellites of COSPAS-SARSAT system of the location of accident where any vessel, aircraft or persons have been engaged in an accident which notified by signals they transmitted via 460 MHz frequency,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

The COSPAS-SARSAT system consists of a space section and ground section;

The space section consists of COSPAS, SARSAT and Geosynchronous satellites.

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

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



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

Cospas-Sarsat System in TURKEY

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

2 Units of LEOLUT and 1 Unit of GEOLUT Unit:

Installed at Esenboğa Airport.

LEOLUT

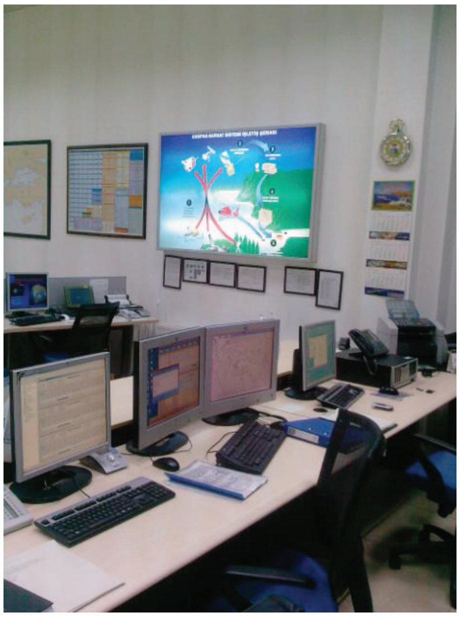
It is an earth receiver station. It receives the accident signals (460 MHz) and, if entered, the position data transmitted by the satellite, by tracing a stationary Geosynchronous satellite, it sets the actual frequency of the accident warning device and sends the device parameters to MCC.

GEOLUT

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

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

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



4 units of RCC Units:

1 unit of RCC is installed at the Main Search and Rescue Coordination Center of Undersecretariat for Maritime Affairs
1 unit of RCC is installed at the Turkish Coast Guard Command
1 unit of RCC is installed at Atatürk Airport
1 unit of RCC is installed at Esenboğa Airport.

Application Details of TRMCC:

1- The EPIRB - ELT - PLB and SSAS beacons on vessels, aircrafts or persons are activated at 406 MHz.
2- The activated signals are received by COSPAS-SARSAT LEOSAR and GEOSAR satellites.
3- Signals are transmitted to GEOLUTs and LEOLUTs located at Esenboğa via 1544,5 MHz carrier frequency.
4- The data processed in LUTs are sent to TRMCC located at AAKKM via the leased line.
5- If the data received at TRMCC are;

- in our own SRR; they are routed to relevant Search and Rescue Centers (Main AKKM, Naval AKKM, Air AKKM) depending on the location and nature of the signal detected.
- in SPOC SRRs; they are routed to the assigned search and rescue center of relevant country via AFTN and e-mail. TRMCC serves Iran, Iraq and Afghanistan, the SPCO countries in its service zone.
- in the service zone of another MCC; they are routed to relevant MCC as described in COSPAS-SARSAT A.001.

6- Necessary filing is performed.

Meosar system

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

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

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

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

With the MEOSAR system fully commissioned,

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

10 satellites have already been launched by USA within the scope of MEOSAR System (*it is planned to use about 80 satellites when the system becomes fully operational*) and through the instrumentality of such satellites, the countries which have established their MEOLUTs has already started to collect analytic data. Data Exchange with Canada, United Kingdom and Brazil which previously established the system has started and active contribution is made to the development of the system with tests.


MARINE TOURISM

CHAPTER VI

MARINE TOURISM

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

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

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

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

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

Marine tourism revenue is 20 % percentage in the General Tourism

➢ Yacht Tourism

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

◈ Blue Voyage

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

Almost 75-80 % of the yacht fleet consists of traditional wooden or classical vessels sailing on the waters of Aegean and Mediterranean for hundreds of years. The blue voyage has made an evolution in terms of boat building technologies by adapting tradition to tourism.

The route of the Blue Voyage from Kusadasi down to Antalya covers and area of 350 sea miles. This route is shortened or lengthened according to the wish of the guest 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.

- **Statistic of The Yachts & Capasity of The Registered Yachting Facilities**

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

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

TABLE 65: Marine Tourisim Facility with Tourism Administration Certifiacate (2011)

Business Tourism Documentation of Yacht Harbour

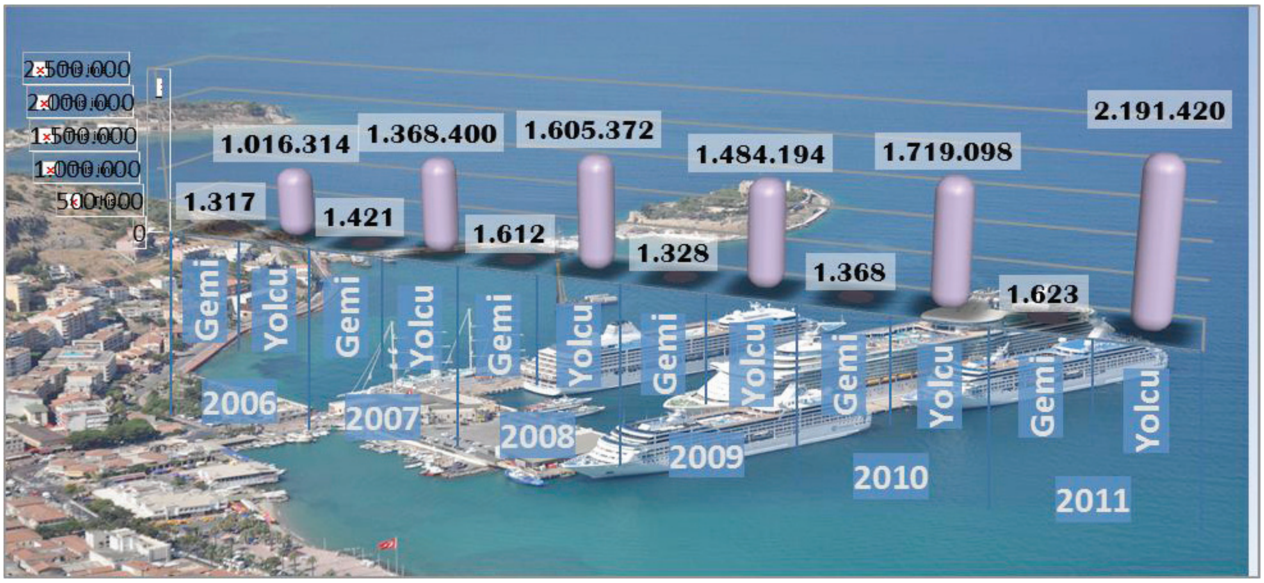
			CAPACITY	
PORT NAME	**TYPE**	**CITY OF**	**AT SEA**	**ON SHORE**
1-Setur Kuşadası Yacht Port	Main Yacht Port	Kuşadası / AYDIN	310	-
2-Ataköy Yacht Port	Secondary Yacht Port	Ataköy / İSTANBUL	700	40
3-Akdeniz Kemer Marina	Secondary Yacht Port	Kemer / ANTALYA	150	150
4-Kaleiçi Yacht Port	Yacht Berthing 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-Marin 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 Turizm Yat Çekek Yeri	Yacht Slipway Facility	Gebze / KOCAELİ	-	60
2-Ayvalık Yat Çekek Yeri	Yacht Slipway Facility	Ayvalık / BALIKESİR	-	140
3-Albatros Yat Çekek Yeri	Yacht Slipway Facility	Marmaris / MUĞLA	40	48
4-Yat Lift	Yacht Slipway Facility	Bodrum/MUĞLA		400
5-Ağanlar Yat Çekek Yeri	Yacht Slipway Facility	Bodrum/MUĞLA	-	200
6-Göcek Yat Çekek Yeri	Yacht Slipway Facility	Fethiye/MUĞLA	-	156
TOTAL			**40**	**1004**
GRAND TOTAL			**1044**	
Yacht Harbour Investment Tourisim Ducumantation				
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	Main Yacht Port	Bodrum / MUĞLA	336	100
6-Alaçatı Yacht Port	Main Yacht Port	Çeşme/İZMİR	260	250
7-Ataport Yacht Port	Main Yacht Port	Zeytinburnu/İSTANBU L	1000	100
8-Alanya Yacht Port	Main Yacht Port	Alanya/ANTALYA	287	160
9-Marintürk Exclusive Göcek	Yacht Berthing Space	Göcek-Fethiye/MUĞLA	96	-
10-Marintürk Göcek Village Port	Secondary Yacht Port	Göcek-Fethiye/MUĞLA	116	200
11-Mandalya Yacht Berthing Space	Yacht Berthing Space	Milas/MUĞLA	50	-
12-Çeşme Yacht Port	Main Yacht Port	Çeşme/İZMİR	377	100
13-Burhaniye Yacht Port	Secondary Yacht Port	Burhaniye/BALIKESİ R	210	100
14-Yalova Yacht Port	Main Yacht Port	YALOVA	240	80
15-Sığacık Yacht Port	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-Marmarin Yat Çekek Yeri	Yacht Slipway Facility	Marmaris/MUĞLA	-	200
2-Yat Marin Yat Çekek Yeri	Yacht Slipway Facility	Marmaris/MUĞLA	-	100
3-Ege Yat Çekek Yeri	Yacht Slipway Facility	Milas/MUĞLA	-	15
TOTAL			**-**	**315**
GRAND TOTAL			**-**	**315**
Source:Ministry of Cultere and Tourisim 17.02.2011				

➢ Cruise Tourism in Turkey

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

GRAPH 62: Statistics of Cruises and Passengers Arrived at Turkish Port Between **2006-2011**



Cruise Ports of Turkey

İstanbul
İzmir
Kuşadası
Fethiye
Marmaris
Bodrum
Antalya
Alanya
Mersin
Sinop
Samsun
Trabzon

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

TABLE 66: Number of Transit Passengers Coming by Cruise Ships (2003-2010)

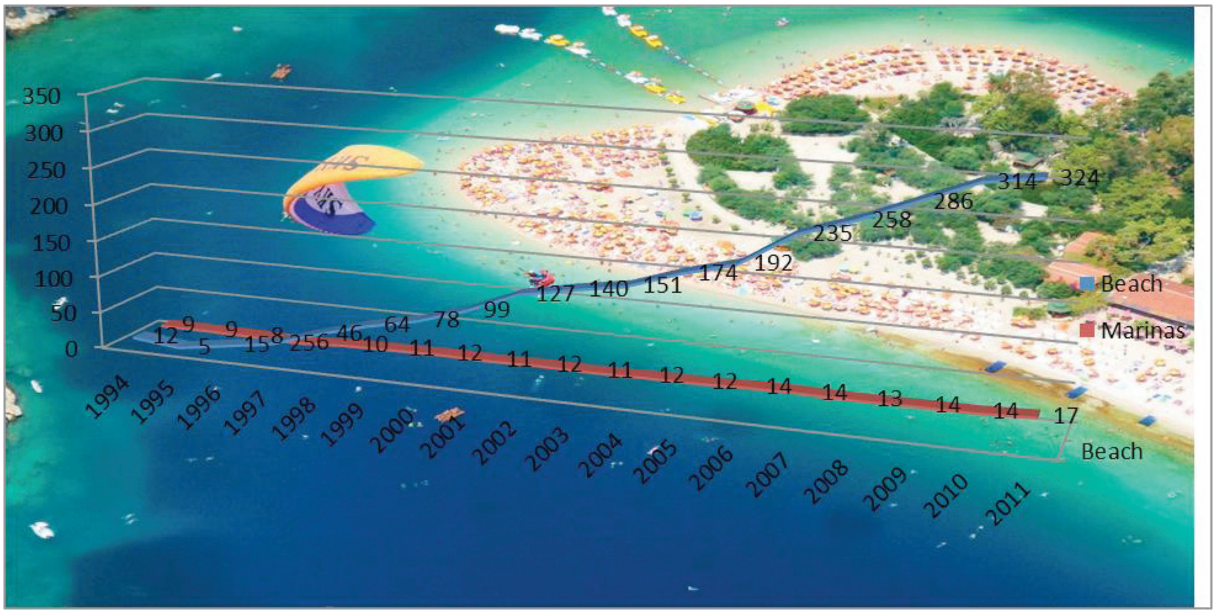
PORT NAME	2003		2004		2005		2006		2007		2008		2009		2010	
	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER	SHIP	PASSENGER
Alanya	63	30.737	106	56.139	100	70.190	114	80.440	124	93.937	84	57.000	73	50.285	2	1.071
Antalya	92	48.012	63	51.049	40	30.424	32	13.015	34	15.680	41	25.057	23	12.549	41	103.859
Bartın	-	-	-	-	-	-	-	-	-	-	8	957	10	941	4	555
Bodrum	63	15.416	79	33.231	55	8.921	66	10.478	63	9.892	126	52.862	87	38.414	89	31.700
Çanakkale	23	3.629	25	4.191	33	7.460	24	5.008	23	5.207	31	8.776	33	8.712	17	7.670
Çeşme	-	-	-	-	-	-	-	-	-	-	3	1.819	1	817	16	9247
Datca	-	-	-	-	-	-	-	-	-	-	1	207	3	1.041	3	778
Dikili	25	16.661	23	6.405	19	4.444	23	3.990	13	2.631	29	10.424	13	6.592	26	15.401
Fethiye	22	2.532	21	3.682	7	3.157	67	3.566	4	948	13	4.217	8	2.615	5	879
Göcek	-	-	-	-	-	-	-	-	-	-	6	1.121	10	1.532	16	2.274
Güllük	-	-	-	-	-	-	-	-	-	-	19	2.747	5	1.172	1	279
İskenderun	-	-	-	-	-	-	-	-	-	-	3	819	2	1.884	1	106
İstanbul	199	200.079	141	114.390	202	176.768	306	273.553	340	422.896	404	489.544	313	476.541	342	508.246
İzmir	5	3.271	33	75.934	39	66.285	105	184.797	122	287.357	133	318.451	129	315.454	159	378.266
Kaş	-	-	-	-	-	-	-	-	-	-	6	600	4	1.341	8	1.317
Kemer	-	-	-	-	-	-	-	-	-	-	1	37	0	0	6	602
Kuşadası	337	225.330	348	221.417	441	301.105	471	368.696	613	466.677	601	518.872	506	462.746	517	493.911
Marmaris	51	32.977	74	74.753	97	83.094	83	65.265	64	60.039	70	101.874	74	81.472	84	146.531
Mersin	-	-	-	-	-	-	-	-	-	-	4	941	3	1.583	1	106
Mudanya	-	-	-	-	-	-	-	-	-	-	1	482	4	1.309	1	24
Samsun	0	0	1	257	3	1.364	9	2.661	8	186	5	596	9	1.524	4	825
Sinop	-	-	-	-	-	-	-	-	-	-	6	3.136	14	7.861	7	7.098
Taşucu	-	-	-	-	-	-	-	-	-	-	1	18	3	440	2	201
Trabzon	7	3.204	13	3.816	12	4.351	17	4.845	13	2.950	15	4.813	18	7.369	14	7.952
Tuzla	-	-	-	-	-	-	-	-	-	-	1	2	0	0	2	0
TOTAL	887	581.848	927	645.264	1.048	757.563	1.317	1.016.314	1.421	1.368.400	1.612	1.605.372	1.328	1.484.194	1.368	1.719.098

(Source: Undersecratariat of Maritime Affairs)

➢ Blue Flag Compaign

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

GRAPH 63 Number of Turkish Beaches and Marinas with Blue Flags by Years



Source: TURÇEV

TABLE 67 : Number of Internatioanal Year of The Blue Flag in 2010

BEACHES			MARINAS		
1	Spain	523	1	Germany	111
2	Greece	421	2	Spain	84
3	France	321	3	Holland	76
4	Turkey	314	4	France	74
5	Portugal	241	5	Denmark	69
6	Italy	231	6	İtaly	61
7	Denmark	216	7	İsveç	51
8	Crothia	116	8	Crothia	20
9	Irland	75	9	Turkey	14
10	North Irland	71	10	Portugal	14
11	South Cyprus	54	11	Greece	9
	Other 27 Country	301	12	Other 21 Country	44
	TOTAL	2884		TOTAL	627

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 Ministry of Health, and funded by the Ministry of Tourism, and taking into account the physical, pH and microbiological parameters. (Source: Ministry of Culture and Tourism)

➢ UNDERWATER DIVING

In the seas of Turkey, divers can discover a fascinating submerged world, from underwater caverns to sunken ships and even the remains of ancient cities. The only areas prohibited to diving are military zones and areas under protection. Diving for scientific research is also prohibited.

Equipped Diving Rules

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

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

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

Material There is no limit for equipment during sportive diving. Balance vest (life vest, BC), tube pressure monitor, depth monitor and time hour usage is obligatory. Usage of lifting balloon or similar materials is forbidden.

Decompressed dives are completely forbidden. High pressurized tube filling compressor in land or in ships, which requires permission from corresponding authorities, can be present during diving.

Agency, club, establishment, hotel, holiday village, school etc. who organize diving, as well as ships should provide first aid material in stock. Underwater photographing and video cameras and all kinds of related materials can be used during diving.

Material Maintenance

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

Ships to be used during dives

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

Diving permission

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

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

TURKISH FISHING SECTOR

CHAPTER VII

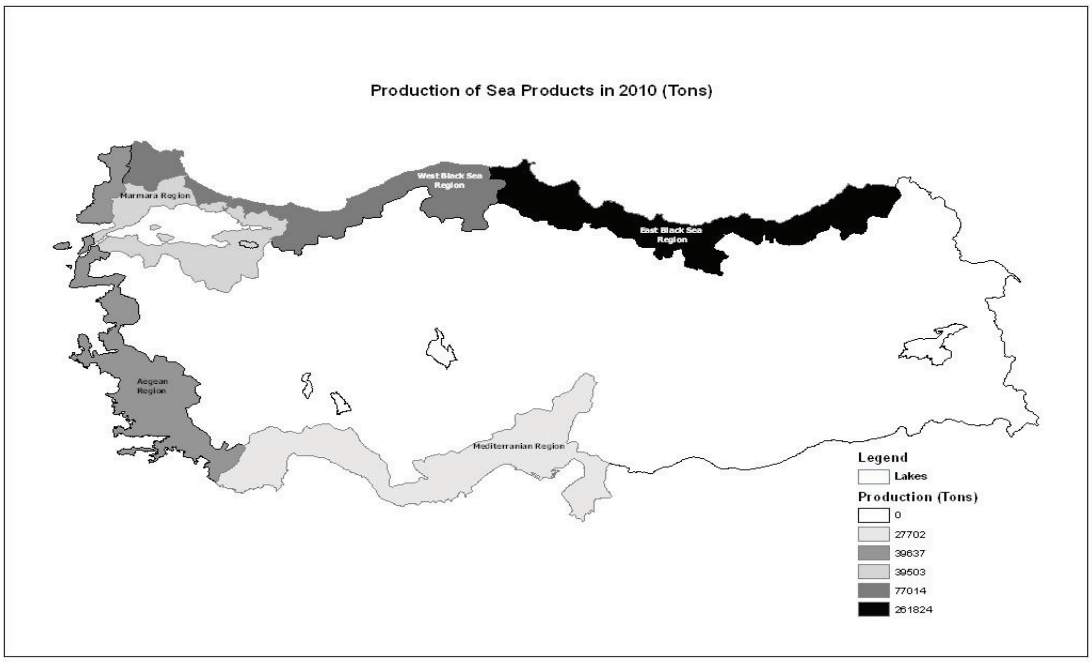
TURKISH FISHING SECTOR

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

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

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

GRAPH 64: Distrubition of Fisheries Production Volume (2010)



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

In 2009 years;

Fishery production decreased by 3,58% in 2009 with respect to the previous year and became approximately 623 thousand tons. The total fishery production consisted of sea fish by 61,12%, other sea products by 7,13%, inland water products by 6,29% and aquaculture by 25,47%.

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

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

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

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

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

Increase in Capture Production and Aquaculture Production 2010

Increase in fishery production by 4,83%

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

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

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

Increase in marine production by catching by 4,85%

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

Changes in fish species

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

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

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

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

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

TABLE 68: Production of Fisheries Exports, Imports and Consumption (1996-2010)

	Production (Ton)	Export(Ton)	Import(Ton)	Domestic concuption (Ton)	Processed(Ton)	Not processed (T on)	Per capital consuption (Kg)
1996	549.646	12.785	29.648	540.564	17.842	8.103	8,602
1997	500.260	18.402	39.829	490.339	21.000	10.348	7,663
1998	543.900	11.558	31.417	528.935	30.000	4.824	8,119
1999	636.824	15.955	39.552	503.249	150.000	7.172	7,590
2000	582.376	14.533	44.230	538.764	71.000	2.309	7,985
2001	594.977	18.978	12.971	517.832	62.755	8.383	7,547
2002	627.847	26.860	22.532	466.289	156.000	1.230	6,697
2003	587.715	29.937	45.606	470.131	120.000	13.253	6,649
2004	644.492	32.804	57.694	555.859	105.000	8.523	7,812
2005	544.773	37.655	47.676	520.985	30.000	3.809	7,229
2006	661.991	41.973	53.563	597.738	60.000	15.843	8,191
2007	772.323	47.214	58.022	604.695	170.000	8.436	8,567
2008	646.310	54.526	63.222	555.275	95.742	3.989	7,812
2009	622.962	54.354	72.686	545.368	90.211	5.715	7,569
2010	653.080	55.109	80.726	505.059	168.073	5.565	6,918

TABLE 69: Quantitiy and Value of Fish Products (2006-2010)

Quantity (Tons) Value (TL)

		Sea products		Aquaculture production		Freshwater products
		Sea Fish	Other sea products	Inland water	Marine water	
2006						
	Quantity	409 945	79 021	56 694	72 249	44 082
	Value	1 385 654 500	192 960 000	240 782 500	525 447 250	128 368 500
2007						
	Quantity	518 201	70 928	59 033	80 840	43 321
	Value	1 077 682 500	116 822 250	265 498 500	574 264 000	128 647 000
2008						
	Quantity	395 660	57 453	66 557	85 629	41 011
	Value	870 455 400	112 518 000	266 555 080	584 091 000	114 205 000
2009						
	Quantity	(1) 380 636	44 410	76 248	82 481	39 187
	Value	648 105 810	64 418 660	324 497 250	628 438 250	124 863 410
2010						
	Quantity	399 656	46 024	78 568	88 573	40 259
	Value	838 416 410	97 404 690	338 205 100	728 573 500	142 694 100

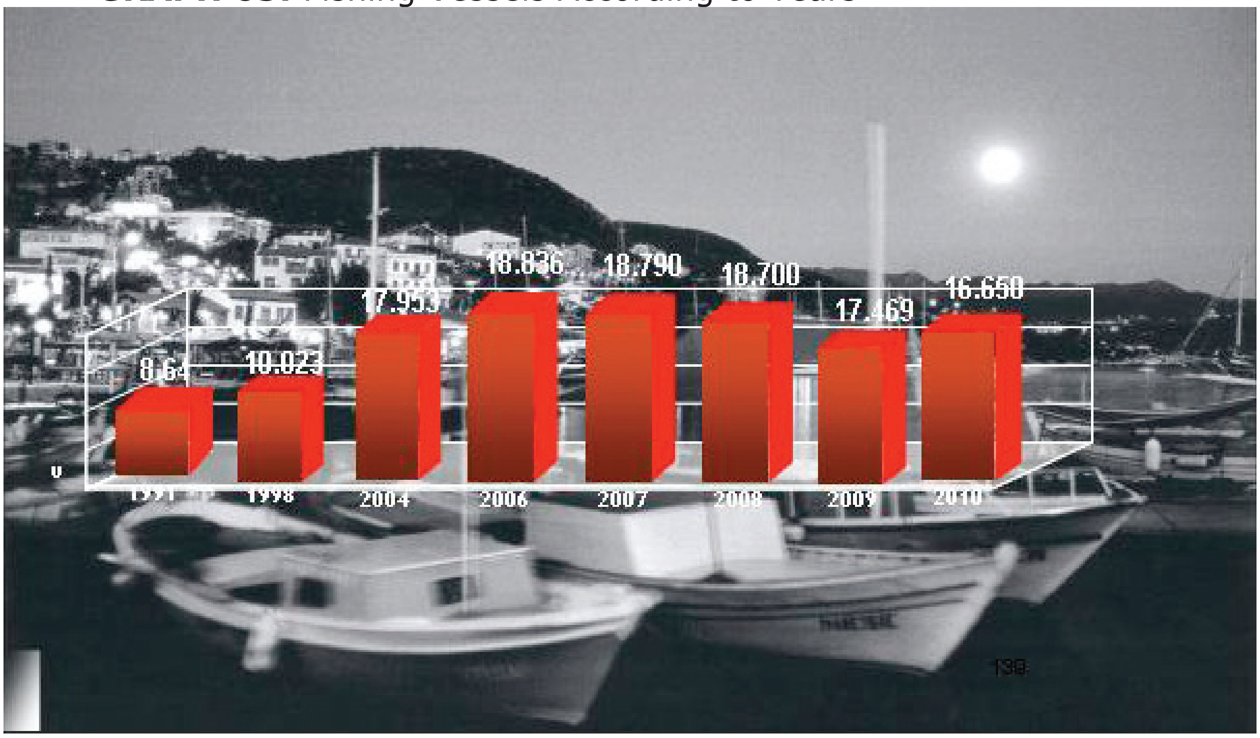
(1) Capture of sea fish production of the year of 2009 is revised.

Fishing Fleet and Catching Water Products

The fishing technology in Turkey is considered to be efficient. Seaborn fishing is being done by artisanal fishing (extension meshes,drag side meshes,pareketa,fish trap) and industrial fishing (Purserseine-trawler)

The types of fishing, common in Turkey are short distance fishing and shore fishing (medium distance fishing). The ocean type (off-shore) fishing is in the beginning process. As of end of 2008, there are 128 fisherman shelters, 44 smaller type of fisherman shelters and 58 slips.

GRAPH 65: Fishing Vessels According to Years



Corporate bodies and persons should have fishing certificates according to Water Products Law Number 1380. The Ministry of Agriculture may restrict the certificates in order to protect of fishing potential. There are 18,790 certificated fishing vessels in Turkey and 1,010 are of big sizes. Dredging and encircle fishing is done by the fishing vessels longer then 12 meters. The Black Sea Region has the major share in fishing sector in Turkey with 1640 km coast line: there are 202 fisherman shelters and slips. In İstanbul, there are 44 shore facilities, consisting of 8 ports, 26 fisherman shelters, and 10 slips.

Fishing vessels in Turkey are generally small vessels, which are suitable for shore fishing. There are 16,650 fishing vessels in total and 83 % of these boats consists of vessels of 5-12 meters which perform shore fishing.

Production distribution of large scale fishermen, collected through survey and having vessels bigger than 10 meters, which have an important share in capture production and small sacale fishermen,collected through survey, having vessels equal to or less than 10 meters

TABLE 70: By Nature of Fishing Vessels (2006-2010)

	2006	2007	2008	2009	2010
Operating type					
Trawler	725	655	543	552	669
Purseseiner	543	493	526	505	485
Trawler-Purseseiner	394	423	469	431	337
Carrier vessels	202	252	213	156	130
Other	15 959	15 858	15 410	15 201	15 029
Material of construction					
Wood	16 747	16 560	16 007	15 748	15 497
Sheetiron	943	1 051	1 071	1 014	1 020
Fiberglass	133	70	83	83	133
Group of tonnage (groston)					
1 - 4	13 024	13 423	13 155	12 783	12 423
5 - 9	2 352	1 904	1 753	2 033	2 132
10 - 29	1 224	1 132	1 054	902	952
30 - 49	399	404	393	376	373
50 - 99	381	396	371	368	413
100 - 199	282	291	291	272	247
200 - 499	144	112	127	97	98
500+	17	19	17	14	12
Group of horsepower (kw)					
1 - 9.9	6 104	6 658	6 141	6 490	6 026
10 - 19.9	3 519	3 172	2 651	2 508	2 407
20 - 49.9	3 446	3 435	3 297	3 402	3 629
50 - 99.9	1 801	1 802	2 147	1 924	1 960
100 - 199.9	1 666	1 305	1 598	1 327	1 363
200 - 499.9	880	823	826	803	868
500+	407	486	501	391	397
Group of length (meters)					
1 - 4.9 (1)	158	226	159	-	-
5 - 7.9	10 051	9 882	9 448	9 312	9 196
8 - 9.9	5 022	4 938	4 855	4 947	4 871
10 - 11.9	623	606	666	748	728
12 - 14.9	640	625	664	585	603
15 - 19.9	482	485	467	422	420
20 - 29.9	641	637	632	623	609
30 - 49.9	194	264	255	198	215
50+	12	18	15	10	8
Situation of generator usage (kw)					
Without generator	17 133	16 855	16 311	16 162	15 938
Power group of generator					
1 - 5	82	61	76	40	37
6 - 10	54	53	78	65	44
11 - 20	61	67	49	43	37
21 - 50	129	159	170	145	169
51 - 99	145	210	222	187	197
100+	219	276	255	203	228
Situation of size of deep freeze depot (m^3)					
Without deep freeze depot	6 880	16 749	16 266	15 963	15 605
Size of deep freeze depot group					
1 - 10	517	485	541	420	635
11 - 20	196	215	177	244	208
21 - 50	149	159	122	169	143
51+	81	73	55	49	59

TurkStat, Fishery Statistics, 2010

(1) The length of vessel 1-4.9 is out of coverage in 2009 and 2010.

Water Production Facilities

According to Article 13 of the Law of Water Products, No:1380, water products farming in Turkey is made by the permission of the Ministry of Agriculture and Village Affairs. In order to arrange more orderly practicing of water products farming, to keep its effects on environment at minimum level, to achieve healthy and quality fish production ; instead of applying the Circular called “Methods and Principles of Water Products Farming” dated 11.10.1999 and serial number 8300, No:SUDB/1999-1, within the frame of rules of harmonization of the European Union Joint Shipping Products Policy Acquirements; “The Regulation of Water Products” was published in the Official Products Gazette dated 29.06.2004, No.25507 and was carried into effect.

In 1971, there was only one water product facility, whereas at the end of 2002 there were 1840 certified facilities, 1,417 of them are inland water and 423 of them are seaborn production facilities. Head Sea Bream and the Sea Bass facilities are located generally at Southern Agean and West Mediterranean. Trout facilities are generally located in The Black Sea Region . Cultivated fishing production was 4,100 tons in 1988 whereas at the end of 2008 this production reached 152.186 tons.

Put into production at the country's current potential for the development of the fisheries is of great significance. The baby needed to aquaculture, collected from nature or produced in hatcheries can be imported from abroad are provided.

Aquaculture production in 2008 at a rate of 8.8% compared to the previous year has increased. Aquaculture production in marine and Inland Waters in 2008, an increase by 8.8% over the previous year was approximately 152 thousand tons.

Aquaculture production in 2008 as the amount of 43.73% of daily Inland Waters, 56.27% 's were carried out in the sea. According to the previous year in 2008, the aquaculture production in the sea at a rate of 5.92%, içsulardaki Aquaculture production has increased at a rate of 12.75%.

Inland Waters 43.32% with the most important species reared trout, sea bass with 32.37%, 20.81% is with the largemouth.The most important species reared trout Inland Waters with 41.8%, with 30% in sea bass, sea bream is 24%.

Foreign Trade in Water Products

◈ Exports

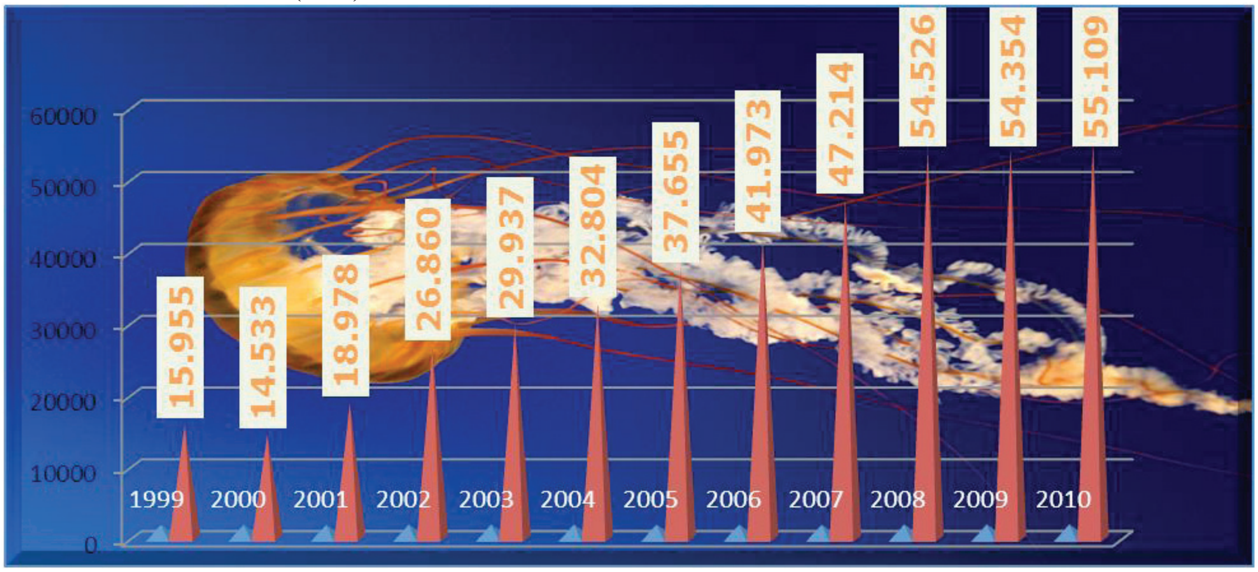
In the previous years, major part of Turkish export water products consisted of frozen fish; but currently it consists of canned fish. Export of canned-fish, is mostly realized to Germany, England, Belgium, Spain, Italy and France. Export to Far East is also developing and some of the main markets are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

15,955 in 1999 (tons), 55,109 In 2010 the exports (tons), reaching the last elevan years, according to the amount of exports increased nearly 170 % has been achieved. Seafood export figures available are examined, the amount and value of our exports in the past year has continued to increase with benchmarks.

As regards 2010 in our country's exports of fish products Japan has the biggest share, being followed by Holland, Greece, Italy, Spain, German, France and Lebanon . Although the markets to which our water products exportation is directed are mostly those of the European Union, we also export fish to all the regions of the world.

GRAPH 66: Exports of Water Production (1999-2010)

Amount (Ton)



Import

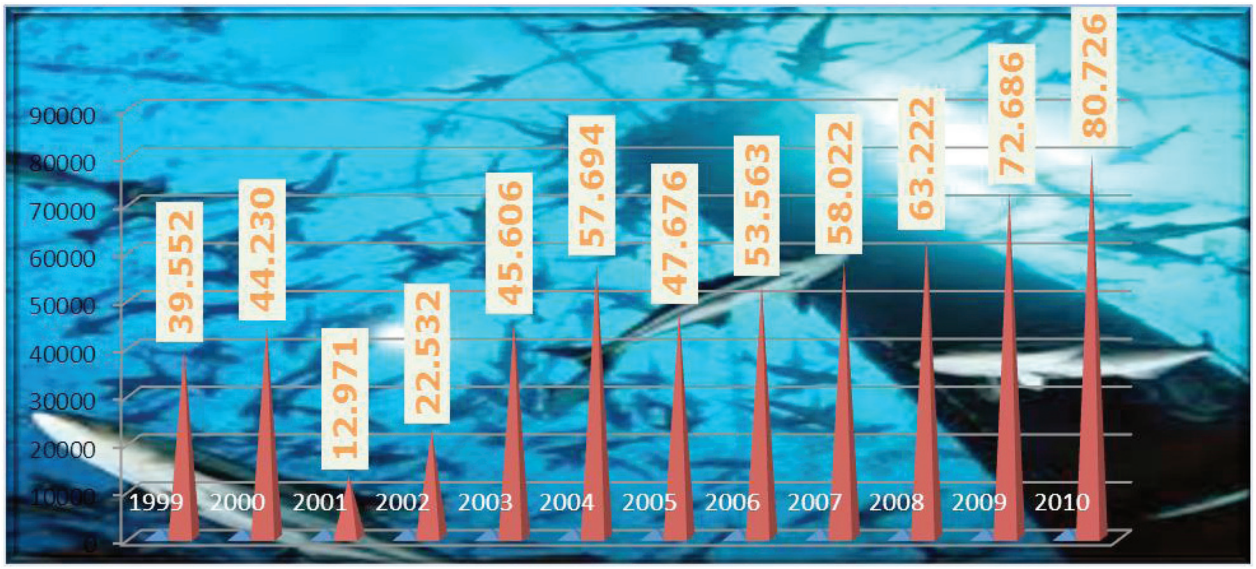
There is an increase in sea food imports. 90 % of sea food imports consists of frozen fish. An impo120 rtant share in import is from The Danube where Tuna fish comes. Import of this fish is made from the European Union countries (especially Holland, UK, and Norway), also from some of the African countries (Ghana) and the Far Eastern countries (Singapore,Thailand)

39,552 in 1999 (tons), 80,726 In 2010 the exports (tons), reaching the last elevan years, according to the amount of exports increased nearly 100 % has been achieved.

As regards 2010, in our country's imports of fish products Norway has the biggest share, being followed by France, India, USA, Morocco , Georgia and Greece

GRAPH 67:Imports of Water Products 1999 – 2010

(Amount (Ton))



Water Products Processing Industry

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

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

MARINE TRAINING

CHAPTER VIII

MARITIME EDUCATION

Ministry of Transport, Maritime Affairs and Communications is the main authoritiy in Turkey in the field of shipping. Ministery issued Regulations for Seafarers so that to adopt maritime training to IMO standards in 2002. Turkey is in the white list with regard to seafarers training since 2000 and the Turkish certificates and diplomas are accepted as equal on the part of IMO

Turkish Chamber of Shipping, one of the most important NGO's of maritime sector, strongly supports the Maritime Education and considers the maritime training as one of its administrative and main functions. In this framework; First Priority: has been given to the lack of Officers Problem and as such the main objective has been to provide a solution to it in the long and medium terms. Second Priority: has been given to the training of highly qualified and sufficient numbers of Maritime Operators.

Turkish Maritime Education Foundation (TÜDEV) was established in Istanbul on 7 January 1993 by 52 founder members, most of whom were from the maritime community. The aim of the Turkish Maritime Education Foundation is to help Turkish Maritime Shipping's reaching to a high level to create Shipping Policies that will help to increase the economical strength and productivity of our Country and will support the development of maritime schools and educational foundations in Turkey both as the level of maritime education and the related facilities.

There are 11 faculties of maritime studies (including one in Northern Cyprus Turkish Repuplic) which supplies education at bachelor's level (four years), 12 Anatolian High Schools and 62 Anatolian Technical High Schools. Piri Reis University was established in 2008 and a modern university campus was constructed in Tuzla/ İstanbul. A list of maritime schools and the number of students are shown below.

FACULTIES OF MARITIME STUDIES

1 Zirve Üniversitesi Deniz Ulaştırma İşletme Mühendisliği
2 Dokuz Eylül Üniversitesi - Denizcilik Fakültesi
3 İstanbul Teknik Üniversitesi - Denizcilik Fakültesi
4 İstanbul Üniversitesi - Mühendislik Fakültesi
5 Karadeniz Teknik Üniversitesi - Sürmene Deniz Bilimleri Fakültesi
6 Kocaeli Üniversitesi - Barbaros Denizcilik Yüksekokulu
7 Piri Reis Üniversitesi - Denizcilik Yüksek Okulu
8 Rize Üniversitesi - Turgut Kıran Denizcilik Yüksekokulu
9 Yakın Doğu Üniversitesi - Denizcilik Fakültesi
10 Yıldız Teknik Üniversitesi - Makine Fakültesi
11 Zonguldak Karaelmas Üniversitesi - Deniz işletmeciliği ve Yönetimi Yüksekokulu

MARITIME ANATOLIAN HIGH SCHOOLS

1 Bahçeşehir Üniversitesi - Meslek Yüksekokulu
2 Çanakkale Üniversitesi - Gelibolu Piri Reis Meslek Yüksekokulu

3 Galatasaray Üniversitesi - Meslek Yüksekokulu
4 İstanbul Teknik Üniversitesi - Meslek Yüksekokulu
5 Kocaeli Üniversitesi - Karamürsel Meslek Yüksekokulu
6 Mersin Üniversitesi - Deniz ve Ticaret Meslek Yüksekokulu
7 Ordu Üniversitesi - Fatsa Meslek Yüksekokulu
8 Uludağ Üniversitesi - Gemlik Asım Kocabıyık Meslek Yüksekokulu
9 Yakın Doğu Üniversitesi - Denizcilik Meslek Yüksekokulu
10 Yalova Üniversitesi - Yalova Meslek Yüksekokulu
11 Zonguldak Karaelmas Üniversitesi - Alaplı Meslek Yüksekokulu
12 Mustafa Kemal Üniversitesi - Pirinçlik Meslek Yüksekokulu

MARITIME ANATOLIAN TECHNICAL HIGH SCHOOLS

1.Ceyhan Denizcilik Anadolu Meslek Lisesi
2. Fettah Tamince Denizcilik Anadolu Meslek Lisesi
3. Manavgat Ticaret ve Sanayi Odası Denizcilik Anadolu Meslek Lisesi
4. Kuşadası Denizcilik Anadolu Meslek Lisesi
5. Ayvalık Denizcilik Anadolu Meslek Lisesi
6. Bandırma Denizcilik Anadolu Meslek Lisesi
7. Kurucaşile Denizcilik Anadolu Meslek Lisesi
8. Bartın Denizcilik Anadolu Meslek Lisesi
9. Tatvan Denizcilik Anadolu Meslek Lisesi
10.Gemlik Denizcilik Anadolu Meslek Lisesi
11.Biga Denizcilik Anadolu Meslek Lisesi
12. Armatör Yakup Aksoy Denizcilik Anadolu Meslek Lisesi
13. Çanakkale Denizcilik Anadolu Meslek Lisesi
14. Kaptan Ahmet Fatoğlu Denizcilik Anadolu Meslek Lisesi
15. Espiye Şehit Cengiz Sarıbaş Denizcilik Anadolu Meslek Lisesi
16. Tirebolu Denizcilik Anadolu Meslek Lisesi
17. Sefa Atakaş Denizcilik Anadolu Meslek Lisesi
18. Ziya Kalkavan Denizcilik Anadolu Meslek Lisesi
19. Barbaros Hayrettin Paşa Denizcilik Anadolu Meslek Lisesi
20. Pendik Denizcilik Anadolu Meslek Lisesi
21. Piri Reis Denizcilik Anadolu Meslek Lisesi
22. Hacı Rahime Ulusoy Denizcilik Anadolu Meslek Lisesi
23. Ulusoy Denizcilik Anadolu Meslek Lisesi
24. Güzelbahçe İMKB Denizcilik Anadolu Meslek Lisesi
25. Şehit İdari Ateşe Çağlar Yücel Denizcilik Anadolu Meslek Lisesi
26. Nevvar Salih İşgören Denizcilik Anadolu Meslek Lisesi
27. İnebolu Denizcilik Anadolu Meslek Lisesi
28. Gölcük Denizcilik Anadolu Meslek Lisesi
29. Hereke Nuh Çimento Denizcilik Anadolu Meslek Lisesi
30. Mersin Deniz Ticaret Odası Denizcilik Anadolu Meslek Lisesi
31. Silifke Denizcilik Anadolu Meslek Lisesi
32. Gündoğan Fahriye Ilıcak Denizcilik Anadolu Meslek Lisesi
33. Fethiye Denizcilik Anadolu Meslek Lisesi
34. Fatsa Atatürk Denizcilik Anadolu Meslek Lisesi
35. Ünye Denizcilik Anadolu Meslek Lisesi
36. Işıklı Denizcilik Anadolu Meslek Lisesi

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

MARITIME SECTOR REPORT 2010 has been prepared by the Turkish Chamber of Shipping in accordance with the related laws. We kindly request you to present your suggestions to our Chamber, concerning with the subjects to be reviewed in more details in the Reports of years to come.

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

Turkish Chamber of Shipping

Publication No : 87
ISBN : 978-605-137-089-7

Coordinator
Cpt. Ahmet TAĞMAÇ

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